

Adding a New Employee to the People Directory and Adding a New Position for an Existing Employee

This article covers how to add a new employee to the People Directory/Account Management as well as adding a new position for an existing employee.

Employees need to have an entry in the People Directory in order to obtain the following:

- Email Account
- Campus Portal Access
- Parking Permit
- Campus-Wide ID (CWID)

Human Resources can also generate a CWID for a new state-side employee, but often this is not available until the employee's first day of work.

What You Need for This Request

You will need the following information on an employee to add them to the People Directory:

- Full Name (First Name, Last Name)
- Social Security Number and/or Campus-Wide ID (CWID)
- Gender
- Position Type (i.e. Full-Time Faculty, Part-Time Staff, Student Employee, etc)
- Department
- Collective Bargaining Unit (For more information, see the <u>CSU Classification</u> <u>Standards</u>. Note that this link will require you to <u>log in to the CSU employee</u> <u>portal</u>.)

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- Position Number (this is the campus position number comprised of agency-unitjob code-serial; i.e. 242-xxx-xxxx for state employees)
- Position Start Date
- Office Location and Work Phone (this can be the main department location/ extension)

Why do you need Social Security Number?

There are several ways that Campus-Wide ID (CWID) can be generated for a person, so it can be difficult to figure out if a person already has a Campus-Wide ID. Entering the person's Social Security Number (SSN) is the best way to make sure that a duplicate CWID is not issued for the person as it can impede a person's access to campus resources if more than one CWID exists for them.

Even if an employee gives you their CWID, it can be useful to enter their Social Security Number to double check that the correct CWID is associated with the Social Security Number.

How do I know if an employee is part-time or full-time?

Typically, you will be given the employee's information by an HR analyst in your department/college/division and that person should know whether the employee is part-time or full-time and they should have the position number and bargaining unit information as well.

Staff: usually those with a timebase of 1.0 are full-time and all other time bases are considered part-time. Consult with <u>Payroll Services</u>, <u>Auxiliary Services Human</u> <u>Resources</u>, or <u>Associated Students Human Resources</u> if you are unclear about the employee's timebase.

Faculty: it can be complicated to calculate a faculty's timebase, so you may need to contact your department/college/division HR coordinator or <u>Faculty Affairs &</u> <u>Records</u> to determine if the faculty is full or part time.

1. Log in to the IT Service Request Forms and access Account



Management.

View more details about accessing Account Management.

2. Click on People Directory.



If you are not already on the People Directory screen, click **People Directory**.

What do you want to do?

I want to add a new employee to the People Directory

1. From the People Directory Records screen, click on New Person.

Account Management		
PEOPLE DIRECTORY EMAIL/LOGIN ACCOUNTS	PHONE DIRECTORY SIGN OUT	HEL
People Directory Records		
Search and select a person or click "New Person".		
CWID ~	Search New Person	

To add a new person, click **New Person**.



2. First, enter the Social Security Number of the employee twice.

It is VERY important that you put the correct Social Security Number (SSN) for the employee in these fields. Putting in an incorrect number can result in problems accessing campus resources.

PEOPLE DIRECTORY	EMAIL/LOGIN ACCOUNTS PHONE DIRECTORY SIGN OUT HELP					
Add A Person To Pe	Add A Person To People Directory					
Please enter the inform	nation below. Please use the correct Social Security Number to avoid future problems with the account.					
* SSN * Confirm SSN	123456789 123456789					
* First Name						
* Last Name						
* Date of birth						
Next						

TIPS

- Most SSNs do not begin with "8." If you are given an SSN that begins with "8," check if this is a CWID by doing a lookup in the People Directory.
- If you did not personally see the Social Security Card of the employee, be sure that you (or the person who gave you the SSN) have verified it with the employee.



3. Next, enter the First Name, Last Name, and Date of Birth for the employee.

PEOPLE DIRECTORY EMAIL/LOGIN ACCOUNTS PHONE DIRECTORY SIGN OUT HELP						
Add A Person To People Directory						
	Please enter the inform	ation below. Please use the correct Social Security Number to avoid future problems with the account.				
	* SSN * Confirm SSN	123456789 123456789				
A B	* First Name * Last Name * Date of birth	Tuffy Titan 01/01/1960				
C	Next					

- A. Enter the First Name and Last Name of the employee. This should be their legal name.
- B. Enter the employee's Date of birth.
- C. Then click **Next**.

Was a match found?

Yes, there was a match for the SSN

1. First, check whether the employee's position has already been added (by someone else or automatically through the campus Human Resources system). Click View next to a position to view more details about the position.

Peopl	e Directory Re	cords						
Click	Click "View" next to desired position, in order to proceed with any email requests.							
CWID	~	800484735		Search New Person				
	CWID	Last Name	MI First Name	New Position				
Sele	ct 800484735	ARTHUR-	LORI	People Directory Position	Department	Percentage	Source	Status
				View Full-Time Staff	IT-Project Management	100.00	CMS	Active

Is the correct position already in the People Directory?

Yes, the correct position exists in the People Directory

You're done! You can now move on to request an email account or other IT assets.

Requesting an Email Account for a New Employee

Requesting an Email Account for a New Student Employee (zz Account)



No, the position exists but the information is incorrect

You will need to reach out to the appropriate source to update the position information.

If the Source is:

- CMS: contact Payroll Services.
- Auxiliary: contact Auxiliary Services Human Resources.
- AS: contact Associated Students Human Resources.
- **Blank**: contact IDM at <u>idm@fullerton.edu</u> with the correction(s) you want to make to the position information as this means another Department IT Coordinator entered the incorrect information manually.

No, the position does not exist

1. Click New Position to add the position.

	People	Directory Re	cords							
	Click "	Click "View" next to desired position, in order to proceed with any email requests.								
	CWID	~	800484735		Search	New Person				
l		CWID	Last Name	MI First Name	New Position					
	Select	800484735	ARTHUR-	LORI	Peo	ple Directory Position	Department	Percentage	Source	Status
					View Full-Tir	me Staff	IT-Project Management	100.00	CMS	Active

2. Select the Position Type Category.

Positions for CSUF Auxiliary Services and Associated Students, Inc. are typically added to the People Directory by their respective Human Resources departments. Please contact <u>Auxiliary Services Human Resources</u> or <u>Associated Students Human Resources</u> before entering positions in these categories.



- Your options for Position Type will change depending on which Position Type Category you select. Sometimes selecting a Position Type Category and then viewing your Position Type options can help you determine which options to choose.
- **State Worker**: person who is employed through the campus state side Human Resources (HRDI)
- **Other**: person who is (often) not employed by CSUF but is an affiliate such as a volunteer, contractor, or visiting scholar. <u>View the article on requesting a non-</u><u>CSUF User account</u> for more details about this Position Type Category.
- **Emeriti**: a faculty or staff member who has been granted <u>emeritus status</u> by the university
- **CSUF Auxiliary Services**: person who is employed by <u>CSUF Auxiliary Services</u>
- Associated Students, Inc: person who is employed by <u>Associated Students, Inc.</u>



3. Select the Position Type.



A. State Worker

- Full-Time Faculty
- Full-Time Staff
- Graduate Assistant
- Part-Time Faculty
- Part-Time Staff
- Student Employee
- Teaching Associate

B. Other

- **Continuing Learning Experience:** individuals who are members of the <u>Osher</u> <u>Lifelong Learning Institute (OLLI)</u> and need access to campus resources
- **Contractor**: vendor who has been contracted with the university to perform a task or service and needs access to campus resources to perform those tasks/services. Typically account name will be vendor name (e.g., c-verizon).
- **Temporary Appointment:** individual who has a temporary appointment with a department and needs access to campus resources, but is not in the state Human Resources, ASC HR, or ASI HR databases

- **Visiting Scholar**: international faculty not employed by the university who conduct research, teach, and/or consult with campus faculty members. Also known as Exchange Visitors.
- Volunteer: individual who is volunteering their time with a department on campus. Volunteers must be officially designated as such using the appropriate process: <u>Campus Human Resources Volunteer Program</u>, <u>Auxiliary Services HR Procedures</u> (see Volunteer Guidelines), or <u>Associated Students</u> <u>HR</u>.

C. Emeriti

- Faculty Emeritus
- Management Emeritus
- Staff Emeritus

D. CSUF Auxiliary Services

- CSUF Auxiliary Services Full-Time Faculty
- CSUF Auxiliary Services Full-Time Staff
- CSUF Auxiliary Services Part-Time Faculty
- CSUF Auxiliary Services Part-Time Staff (20)
- CSUF Auxiliary Services Part-Time Staff (30)

E. Associated Students, Inc.

- AS Full-Time Staff
- AS Non Student
- AS Part-Time Staff
- AS Student Assistant
- AS Student Leader
- AS Work Study

4. Select the department and collective bargaining unit for the employee's position.

Don't see a department? Contact <u>idm@fullerton.edu</u>. If you were not originally authorized as a Department IT Coordinator for the department, you will be asked to obtain authorization.



A	* Department	10351 - IT - Enterprise Resource Planning	<
В	* Collective Bargaining Unit	R09 - Technical V	

- A. Select the employee's Department. You will only see the department(s) that you are authorized for.
- B. Select the employee's Collective Bargaining Unit. This information should be included with their position information or you can view the <u>CSU Classification</u> Standards. (Note that this link will require you to log in to the CSU employee portal.)
 - You can use **U99 Unrepresented** for non-state employees (Associated Students ASI employees, CSUF Auxiliary Services employees) as well as Student Employees, Contractors, Visitors, and Visiting Scholars.

If the employee is associated with San Jose State University (SJSU), you can use RSJ - SJSU - Unrepresented.

5. Enter the campus position number and the position start date.

Note that if you enter an incorrect or incomplete position number, the information will be overridden by the information in the campus Human Resources system once the employee's job record is exported to the People Directory. However, you will want to make sure that the Department and Position Type are accurate so the People Directory can accurately connect the People Directory position to the Human Resources position.

A * Position Number	242 - 450 - 1038 - 000
B * Position start date (MM/DD/YYYY)	01/23/2023

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- A. Enter the employee's Position Number. This is Agency + Unit + Job Code + Serial Number. You should be able to find this information with the position description. You may enter the serial number as 000 as that number may not have been assigned by campus Human Resources yet.
- B. Enter today's date as the position start date. This will allow the employee to access the portal and email as soon as the accounts are generated; if you put a date in the future, the employee will not be able to access the portal until that date. You may not backdate this field.
 - For non-state employees, you may enter all zeroes as the position number (i.e., 000-000-0000-000). For state employees, please do NOT enter all zeroes; it may impact the employee's ability to get an appropriate parking permit and IT assets.

6. Enter the Office and Work Phone for the employee.



- A. Enter the Office where the employee will be located. If an office has not been assigned, you can enter the department office.
- B. Enter the Work Phone that the employee is assigned to. If an extension has not been assigned, you can enter the department's main number.

7. Review the information you've entered and then click Continue.

Add A Position To People Directory	
Please fill out the information below.	
CWID	80000000
First Name	Tuffy
Initials	
Last Name	Titan
Suffix	
Gender	F
* Position Type Category	State Worker
* Position Type	Full-Time Staff V
* Department	10351 - IT - Enterprise Resource Planning v
* Collective Bargaining Unit	R09 - Technical 🗸
* Position Number	242 - 450 - 1038 - 000
* Position start date (MM/DD/YYYY)	01/16/2023
Office (Example: SGMH-123B)	PLS (Pollak Library South) v - 237
* Work Phone (If no personal extension assigned, please use department general extension)	(657) 278 - 7777
Continue	

8. Verify the information you entered is correct. Then click Submit. Or click Back to return to the previous screen.

• You will not be able to edit this information later, so be sure that you have entered everything correctly.



Add A Position To People Directory					
Please verify and submit	Please verify and submit the information below.				
CWID	80000000				
First Name	Tuffy				
Initials					
Last Name	Titan				
Suffix					
Gender	F				
Position Type	Full-Time Staff				
Department	10351 – IT – Enterprise Resource Planning				
Collective Bargaining Uni	t R09 - Technical				
Position Number	242-450-1038-000				
Position start date	01/16/2023				
Office	PLS-237				
Work Phone	(657)278-7777				
Back Submit Cancel					

9. You're done!



No, there was no match found for the SSN

1. Enter the First Name and Last Name of the employee as well as Initials and Suffix (if applicable). Select the appropriate gender.

	PEOPLE DIRECTORY	EMAIL/LOGIN ACCOUNT	S PHONE DIRECTORY			
	Add A Person To People Directory					
	Please fill out the inform	ation below.				
	SSN	1	23456789			
(A)	* First Name		Гuffy			
В	Initials					
C	* Last Name	٦	Fitan			
D	Suffix (Jr., Sr., II, M.D., etc)	Please Select 🗸			
Ξ	* Gender		⊙ Male O Female			

- A. Enter the first name of the employee. This should be their legal first name.
- B. If known, enter the employee's middle initial.
- C. Enter the last name of the employee. This should be their legal last name.
- D. If appropriate, enter the employee's suffix (i.e., Jr, Sr., etc.).
- E. Select the employee's gender.
 - Unfortunately at this time, there are no additional options for gender identity. However, the gender selected in the People Directory will not override any gender identity information in other campus databases.

2. Select the Position Type Category.

Positions for CSUF Auxiliary Services and Associated Students, Inc. are typically added to the People Directory by their respective Human Resources departments. Please contact <u>Auxiliary Services Human Resources</u> or <u>Associated Students Human Resources</u> before entering positions in these categories.



- Your options for Position Type will change depending on which Position Type Category you select. Sometimes selecting a Position Type Category and then viewing your Position Type options can help you determine which options to choose.
- **State Worker**: person who is employed through the campus state side Human Resources (HRDI)
- **Other**: person who is (often) not employed by CSUF but is an affiliate such as a volunteer, contractor, or visiting scholar. <u>View the article on requesting a non-CSUF User account</u> for more details about this Position Type Category.
- **Emeriti**: a faculty or staff member who has been granted emeritus status by the university
- CSUF Auxiliary Services: person who is employed by CSUF Auxiliary Services
- Associated Students, Inc: person who is employed by Associated Students, Inc.



3. Select the Position Type.



A. State Worker

- Full-Time Faculty
- Full-Time Staff
- Graduate Assistant
- Part-Time Faculty
- Part-Time Staff
- Student Employee
- Teaching Associate

B. Other

- **Continuing Learning Experience:** individuals who are members of the <u>Osher</u> <u>Lifelong Learning Institute (OLLI)</u> and need access to campus resources
- **Contractor**: vendor who has been contracted with the university to perform a task or service and needs access to campus resources to perform those tasks/services. Typically account name will be vendor name (e.g., c-verizon).
- **Temporary Appointment:** individual who has a temporary appointment with a department and needs access to campus resources, but is not in the state Human Resources, ASC HR, or ASI HR databases

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- Volunteer: individual who is volunteering their time with a department on campus. Volunteers must be officially designated as such using the appropriate process: <u>Campus Human Resources Volunteer Program</u>, <u>Auxiliary Services HR Procedures</u> (see Volunteer Guidelines), or <u>Associated Students</u> <u>HR</u>.

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- Faculty Emeritus
- Management Emeritus
- Staff Emeritus

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- CSUF Auxiliary Services Full-Time Faculty
- CSUF Auxiliary Services Full-Time Staff
- CSUF Auxiliary Services Part-Time Faculty
- CSUF Auxiliary Services Part-Time Staff (20)
- CSUF Auxiliary Services Part-Time Staff (30)

E. Associated Students, Inc.

- AS Full-Time Staff
- AS Non Student
- AS Part-Time Staff
- AS Student Assistant
- AS Student Leader
- AS Work Study

4. Select the department and collective bargaining unit for the employee's position.

Don't see a department? Contact <u>idm@fullerton.edu</u>. If you were not originally authorized as a Department IT Coordinator for the department, you will be asked to obtain authorization.



A	* Department	10351 - IT - Enterprise Resource Planning	<
В	* Collective Bargaining Unit	R09 - Technical V	

- A. Select the employee's Department. You will only see the department(s) that you are authorized for.
- B. Select the employee's Collective Bargaining Unit. This information should be included with their position information or you can view the <u>CSU Classification</u> <u>Standards</u>. (Note that this link will require you to <u>log in to the CSU employee</u> <u>portal</u>.)
 - You can use U99 Unrepresented for non-state employees (Associated Students ASI employees, CSUF Auxiliary Services employees) as well as Student Employees, Contractors, Visitors, and Visiting Scholars.

If the employee is associated with San Jose State University (SJSU), you can use **RSJ - SJSU - Unrepresented**.

5. Enter the campus position number and the position start date.

Note that if you enter an incorrect or incomplete position number, the information will be overridden by the information in the campus Human Resources system once the employee's job record is exported to the People Directory. However, you will want to make sure that the Department and Position Type are accurate so the People Directory can accurately connect the People Directory position to the Human Resources position.

A * Position Number	242 - 450 - 1038 - 000
B * Position start date (MM/DD/YYYY)	01/23/2023

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- A. Enter the employee's Position Number. This is Agency + Unit + Job Code + Serial Number. You should be able to find this information with the position description. You may enter the serial number as 000 as that number may not have been assigned by campus Human Resources yet.
- B. Enter today's date as the position start date. This will allow the employee to access the portal and email as soon as the accounts are generated; if you put a date in the future, the employee will not be able to access the portal until that date. You may not backdate this field.
 - For non-state employees, you may enter all zeroes as the position number (i.e., 000-000-0000-000). For state employees, please do NOT enter all zeroes; it may impact the employee's ability to get an appropriate parking permit and IT assets.

6. Enter the Office and Work Phone for the employee.

A	Off Campus Email	
B	Office (Example: SGMH-123B)	PLS (Pollak Library South) v - 237
0	* Work Phone (If no personal extension assigned, please use department general extension)	(657) 278 - 7777

- A. You do not need to enter Off Campus Email when adding a user to the People Directory. You can add it if/when you request an email account for this employee.
- B. Enter the Office where the employee will be located. If an office has not been assigned, you can enter the department office.
- C. Enter the Work Phone that the employee is assigned to. If an extension has not been assigned, you can enter the department's main number.



7. Review the information you've entered and then click Continue.

Please fill out the information below.	
SSN	123456789
* First Name	Tuffy
Initials	
* Last Name	Titan
Suffix (Jr., Sr., II, M.D., etc.)	Please Select 🗸
* Gender	Male ○ Female
* Position Type Category	State Worker
* Position Type	Full-Time Staff 🔹 🗸
* Department	10351 - IT - Enterprise Resource Planning
* Collective Bargaining Unit	V99 - Unrepresented v
* Position Number	242 - 450 - 1038 - 000
* Position start date (MM/DD/YYYY)	01/23/2023
Off Campus Email	
Office (Example: SGMH-123B)	PLS (Pollak Library South) - 237
* Work Phone (If no personal extension assign please use department general extension)	ed, (657) 278 - 7777

8. Verify the information you entered is correct. Then click Submit. Or click Back to return to the previous screen.

• You will not be able to edit this information later, so be sure that you have entered everything correctly.



dd A Person To People Directory			
Please verify and submit t	he information below.		
SSN	123456789		
First Name	Tuffy		
Initials			
Last Name	Titan		
Suffix			
Gender	Male		
Position Type	Full-Time Staff		
Department	10351 – IT – Enterprise Resource Planning		
Collective Bargaining Unit	U99 – Unrepresented		
Position Number	242-450-1038-000		
Position start date	01/23/2023		
Off Campus Email			
Office	PLS-237		
Work Phone	(657)278-7777		
Back Submit Cancel			

9. You're done!

I want to add a new position for an existing employee

1. Enter search criteria to look up the employee's People Directory entry. Then click Search.

It's highly recommend that you search by CWID to ensure you access the correct employee.



People Directory Records			
Click "View" next to desired position, in order to proceed with any email requ	Jests.		
CWID v 800484735 Search	New Person		

2. Click New Position to add the position.

Peo	ople Directory Red	cords						
C	Click "View" next to desired position, in order to proceed with any email requests.							
CW	VID V	800484735		Search New Person				
	CWID	Last Name	MI First Name	New Position				
S	elect 800484735	ARTHUR-	LORI	People Directory Position	Department	Percentage	Source	Status
				View Full-Time Staff	IT-Project Management	100.00	СМS	Active

3. Select the Position Type Category.

Positions for CSUF Auxiliary Services and Associated Students, Inc. are typically added to the People Directory by their respective Human Resources departments. Please contact <u>Auxiliary Services Human Resources</u> or <u>Associated Students Human Resources</u> before entering positions in these categories.



* Position Type Category	Please Select 🗸
* Position Type	Please Select
* Department	State Worker
* Collective Bargaining Unit	Other
	Emeriti
* Position Number	CSUF Auxiliary Services
* Position start date (MM/DD/YYYY)	Associated Students, Inc.

- Your options for Position Type will change depending on which Position Type Category you select. Sometimes selecting a Position Type Category and then viewing your Position Type options can help you determine which options to choose.
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- Associated Students, Inc: person who is employed by Associated Students, Inc.



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A	* Department	10351 - IT - Enterprise Resource Planning	<
В	* Collective Bargaining Unit	R09 - Technical V	

- A. Select the employee's Department. You will only see the department(s) that you are authorized for.
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 - For non-state employees, you may enter all zeroes as the position number (i.e., 000-000-0000-000). For state employees, please do NOT enter all zeroes; it may impact the employee's ability to get an appropriate parking permit and IT assets.

7. Enter the Office and Work Phone for the employee.



- A. Enter the Office where the employee will be located. If an office has not been assigned, you can enter the department office.
- B. Enter the Work Phone that the employee is assigned to. If an extension has not been assigned, you can enter the department's main number.

8. Review the information you've entered and then click Continue.

Add A Position To People Directory	
Please fill out the information below.	
CWID	80000000
First Name	Tuffy
Initials	
Last Name	Titan
Suffix	
Gender	F
* Position Type Category	State Worker
* Position Type	Full-Time Staff V
* Department	10351 - Π - Enterprise Resource Planning 🗸 🗸
* Collective Bargaining Unit	R09 - Technical 🗸
* Position Number	242 - 450 - 1038 - 000
* Position start date (MM/DD/YYYY)	01/16/2023
Office (Example: SGMH-123B)	PLS (Pollak Library South) - 237
* Work Phone (If no personal extension assigned, please use department general extension)	(657) 278 - 7777
Continue	

9. Verify the information you entered is correct. Then click Submit. Or click Back to return to the previous screen.

You will not be able to edit this information later, so be sure that you have entered everything correctly.



Add A Position To Peo	ople Directory
Please verify and submit t	he information below.
CWID	80000000
First Name	Tuffy
Initials	
Last Name	Titan
Suffix	
Gender	F
Position Type	Full-Time Staff
Department	10351 – IT – Enterprise Resource Planning
Collective Bargaining Unit	R09 - Technical
Position Number	242-450-1038-000
Position start date	01/16/2023
Office	PLS-237
Work Phone	(657)278-7777
Back Submit Cancel	

10. You're done!

Need More Help?

Contact the IT Help Desk at <u>helpdesk@fullerton.edu</u> or 657-278-7777.