

## Affiliate Persons Account Request Process for Volunteer International Visitors

- 1) In the My.CalPoly.edu portal menu select **Technical Service Request** from the Single Click Access menu.
- 2) Select **New Account Request**
- 3) Complete information for the Requestor (you).
- 4) For the Account Recipient information, follow the directions in the yellow box (shown below).
  - a. Enter **"aother"** for the Rec Username Lookup since this person has no username yet.

**Recipient Information - Individual Receiving Account/Services**

To lookup the recipient, do the following:  
 1. If the person is a current member of Cal Poly (Staff or Student), type in the Recipient's username in the Rec Username Lookup field.  
 2. Select the **Click to Lookup Recipient** button to populate the Recipient fields. Use the Directory Information Channel (CP Portal) to lookup a username.  
 3. If the person is **not** a current member of Cal Poly, use **aother** (Anonymous Other) for the Recipient username.

Populate Recipient fields: **Recipient same as Requestor**

Rec Username Lookup: **aother** **Click to Lookup Recipient**

**type** → **click**

*Rec Name:	Anonymous Other	*Rec Email:	
*Rec Primary Phone:	n/a	*Rec Dorm Phone:	n/a
*Rec DeptID:	206500	*Rec Department :	n/a
*Rec Building:		*Rec Room:	

**result** ←

**Request Details**

\*Request Type: **New Account** Request Sub-Type: **Affiliated User Account**

- 5) Under Request Details, select **New Account** and Request Sub-Type is **Affiliated User Account**.
- 6) Complete the information for your visiting scholar, including the program participation dates at Cal Poly. For Relationship to CP, select **Visiting Scholar** from the drop-down list.

**Request Details**

\*Request Type: **New Account** Request Sub-Type: **Affiliated User Account**

**Affiliated Person Account Request - Click here for HELP**

**Step - 1, Affiliated Person (Recipient) Information**  
 1. Fields with a Red Asterisk (\*) are required.  
 2. You must get approval from both the Sponsored by (see drop down menu on form for authorized list) and Chart Field approver (along with the Chart Field to be used) before starting this request.  
 3. You must get the Sponsor's approval in writing (email) and either attach the email to the request (select the Attach/Manage button just below the Description field) or copy and paste the contents of the email to the end of the description in the Description field.  
 4. Start - End Dates: no more than one (1) year apart  
 5. The account must be renewed yearly.  
 6. A real birth date is required to identify the user in the data warehouse  
 7. See help link above for full details

\*First Name: Sally Preferred First:

Middle Name:  Preferred Middle:

\*Last name: Scholar Preferred Last:

\*Birth Date (MM/DD/YYYY): 01/01/1990 \*Start Date (MM/DD/YYYY): 09/15/2016

\*Recipient Contact Phone: +86-123-4567-14 \*End Date (MM/DD/YYYY): 06/15/2017

\*Recipient Contact email: sally.scholar@myuni.edu \*Relationship to CP: **Visiting Scholar**

Recipient Contact Address:

Has this person been previously associated with Cal Poly? (e.g. current or former student, faculty, staff, etc.)

\*Previously Associated: **Yes** If known, please supply previous username and/or EMPLID

Previous Information: **012345678**

- 7) From the **Previously Associated** drop-down, select **"Yes,"** then enter the **Empl ID** in the **Previous Information** box.
- 8) Complete information on your Approver and your Dean or Associate Dean.
- 9) Enter your **chart field**. NOTE: Information Services is not currently charging departments anything to do this, but it is still required on the form.
- 10) Select the **Systems** your visitor will need. (E-mail/Calendar at a minimum).
- 11) Read the appropriate Usage Agreement then click both usage agreement checkboxes.
- 12) Check **Ready for Approval** if you are ready to submit the request now. If you just want to save it and finish it later, you can do that.
- 13) Enter in the Requester Notes: **"NOTE: This Visiting Scholar has a PeopleSoft record as a Person of Interest. His/her Empl ID is: XXXXXXXX. Please do not create a duplicate PeopleSoft record."**