

POI TEMPLATE INSTRUCTIONS

Template Field Name	Optional	Recommended	Required	Notes
ACTION			X	Valid values are A, I, U. A=Add a new POI record to the system; I=Inactivate an existing POI record; U=Update a data field(s) on an existing POI record
POI ID			X	Required when Action is I or U. Length = 6. Leading zeros must be retained
FIRST_NAME			X	
LAST_NAME			X	
MIDDLE_NAME	X			
SEX	X			Valid values are M, F
ADDRESS_TYPE			X	Required when Action=A. Valid address types are HOME and BUSN
ADDRESS_1			X	Required when Action=A. Do not use any punctuation or other symbols in the address. i.e. #, -, . etc
ADDRESS_2	X			
CITY			X	Required when Action=A
STATE			X	Required when Action=A
POSTAL			X	Required when Action=A
EMAIL_ADDR		X		
E_ADDR_TYPE		X		Valid email address types are HOME and BUSN. If an email address is provided, this field is required
PHONE		X		Format ###-###-####.
PHONE_TYPE		X		Valid phone types are HOME, BUSN and CELL. If a phone number is provided, this field is required

POI TEMPLATE INSTRUCTIONS

Template Field Name	Optional	Recommended	Required	Notes
LOCATION			X	Required when Action=A. 3 character deptid followed by 001, i.e. CON001
POI ALTERNATE ID	X			Limited to 15 characters/numbers, etc
ADDITIONAL POI DATA 1	X			Limited to 15 characters/numbers, etc
ADDITIONAL POI DATA 2	X			Limited to 15 characters/numbers, etc
ADDITIONAL POI DATA 3	X			Limited to 15 characters/numbers, etc
DEPARTMENT/ORGANIZATION ID			X	Required when Action=A. Department or Organization, i.e. CON, ASR, UCSF, etc
PLANNED EXIT DATE			X	Required when Action=A. Required when Action=U if updating this field. Format is mm/dd/yyyy
SPONSOR DSW ID			X	Required when Action=A. Required when Action=U if updating this field. Field length is limited to 5 digits when the first digit is a zero, else the limit is 6 digits. Example: 012345 should be reported as 12345

Additional Information:

**You must submit your file in a .csv format using the following naming convention:
MRG_HR0864_YYYYMMDD**

When making changes to an existing POI record use Action=U and include the following: POI ID, First Name, Last Name and only the data values you want to update. Example - To change the Planned Exit Date you will populate the POI ID field, the First/Last Name fields and the Planned Exit Date field.

To reactivate an existing POI use Action=U and include any changes i.e. Planned Exit Date, etc. You do not need to indicate the status. Any Inactive record that is reported with an Action=U will be automatically reactivated.