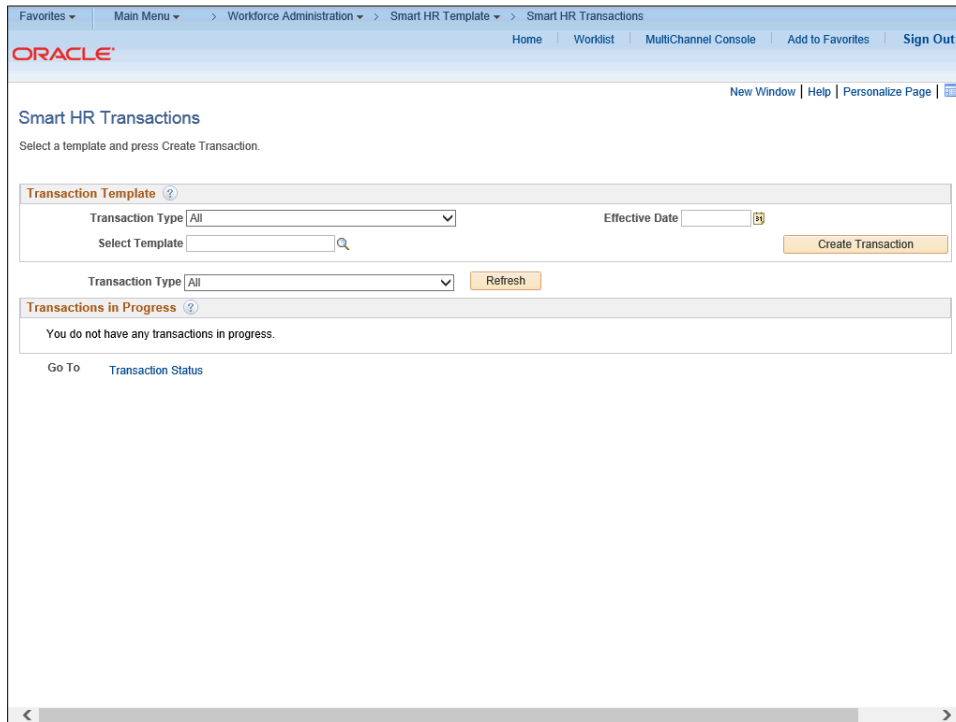



Use this task to initiate adding a contingent worker (no position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

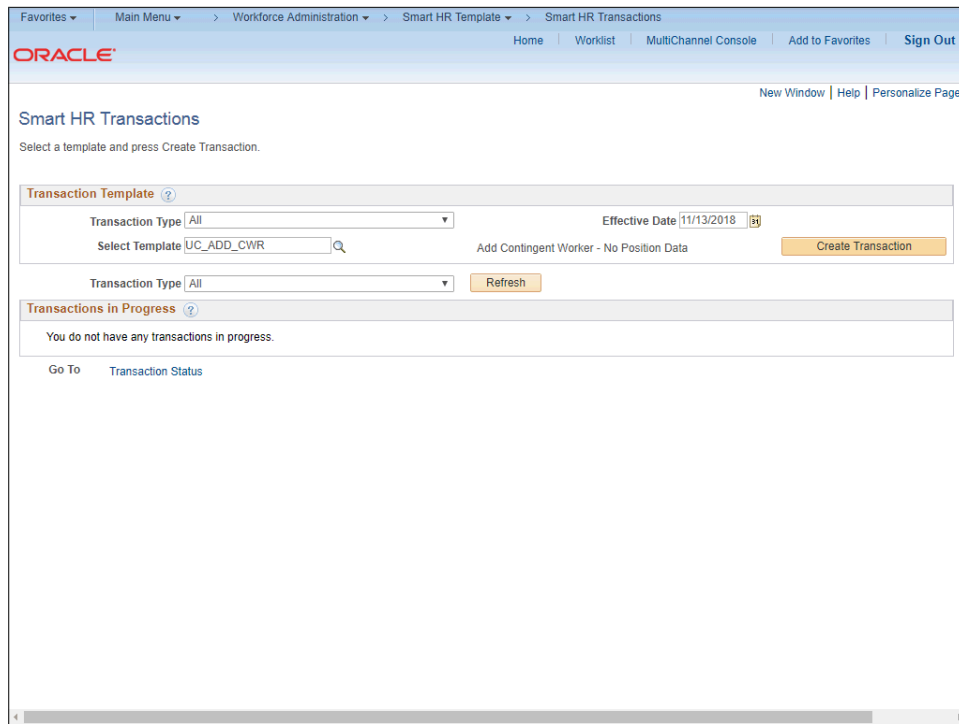
Note: This page also may be available in **Workcenter** depending on your security access.

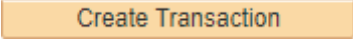


Step	Action
1.	Use the Smart HR Transactions page to initiate a template transaction.
2.	Click the Look up Select Template button. Note: The Transaction Type field is not used by UC 
3.	Select the appropriate add contingent worker template. Notice there are two add contingent worker templates, one for adding a contingent worker with a position and one for adding a contingent worker without position data. Click the UC_ADD_CWR list item. UC_ADD_CWR

**UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction**

Step	Action
4.	Click in the Effective Date field. <input data-bbox="396 1079 537 1115" type="text"/>
5.	The Effective Date field is the effective date of the selected template action. The date you enter in this field automatically populates the Effective Date field on the Enter Transaction Details page. You can update the Effective Date on the Enter Transaction Details page if needed. Enter the desired information into the Effective Date field.



Step	Action
6.	Click the Create Transaction button. 
7.	In the Employee ID field, accept the default value of NEW . After the WFA Production team at UCPATH Center processes the new hire template, the system automatically generates the next sequential UC Employee ID number for the individual.
8.	The Effective Date is populated based on your entry on the previous page. Ensure that you entered the correct hire date or the date the contingent worker begins the job. For this example, accept the default date.

**UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction**

Smart HR Transactions
Enter Transaction Details

The following transaction details are required.

Template Add Contingent Worker - No Position Data

Organizational Relationship Contingent Worker

*Employee ID NEW


*Effective Date 11/13/2018

Action Add Contingent Worker

Reason Code Add Contingent Worker

*Address Format United States

Continue Cancel

Step	Action
9.	Click the Continue button. 
10.	The add contingent worker template appears. Header details appear above the tabs. You can show/hide the header information as needed.
11.	The add contingent worker template includes two tabs: Personal Data and Job Data . Fields that are required by the system are indicted with an asterisk *.

Step	Action
12.	Click in the First Name field. <input type="text"/>
13.	Enter the desired information into the First Name field.
14.	Click in the Last Name field. <input type="text"/>
15.	Enter the desired information into the Last Name field.
16.	Click in the Date of Birth field. <input type="text"/>

UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Primary Name - English

*First Name Ignacio Middle Name
*Last Name Perro Name Suffix

Birth Information

Date of Birth

Person National ID United States

National ID Type PR National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

*Address Type Home Address Line 1
Address Line 2 City
State *Postal Code
County

Step	Action
17.	Enter the desired information into the Date of Birth field.

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Primary Name - English

*First Name Ignacio Middle Name
*Last Name Perro Name Suffix

Birth Information

Date of Birth 04/01/1987

Person National ID United States

National ID Type PR National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

*Address Type Home Address Line 1
Address Line 2 City
State *Postal Code
County

Step	Action
18.	National ID is an optional field for a contingent worker. Click in the National ID field.
19.	Enter the individual's social security number in the National ID field.

The screenshot shows the Oracle UCPATH PILOT interface for 'Enter Transaction Information'. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'ORACLE' and 'Smart HR Transactions'. The sub-header is 'Enter Transaction Information'. Below the header, there are tabs for 'Personal Data' and 'Job Data'. The 'Employee Information' section includes fields for 'Primary Name - English' (First Name: Ignacio, Middle Name, Last Name: Perro, Name Suffix) and 'Birth Information' (Date of Birth: 04/01/1987). The 'Person National ID United States' section has a 'National ID Type' dropdown set to 'PR' and a 'National ID' field containing '555229876'. The 'Person Alternate Employee ID' section has a 'UC Location Match ID' field. The 'Person Address 01 - United States' section has fields for 'Address Type' (Home), 'Address Line 1', 'Address Line 2', 'City', 'State', 'Postal Code', and 'County'. A red box highlights the 'National ID' field.

Step	Action
20.	Scroll down to display additional fields and page functions. Click the scroll bar.

UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction

Step	Action
21.	Click in the Address Line 1 field. <input type="text"/>
22.	Enter the desired information into the Address Line 1 field.
23.	Click in the City field. <input type="text"/>
24.	Enter the desired information into the City field.
25.	Click in the State field. <input type="text"/>
26.	Enter the desired information into the State field.
27.	Click in the Postal Code field. <input type="text"/>
28.	Enter the desired information into the Postal Code field.
29.	Click in the Patent Acknowledgment Sign Dt field. <input type="text"/>

Step	Action
30.	In the Patent Acknowledgment Sign Dt field, enter the date on which the individual signed the UC patent acknowledgement.
31.	If applicable, to indicate the person did not originally sign the standard Patent Acknowledgment form, select the Modified Patent Ackmnt Sign Dt check box.
32.	Use the Comments field to enter specific details or an explanation regarding the transaction. This field is referenced by the WFA Production team at UCPath Center to gain additional information for the transaction.

The screenshot displays the Oracle UCPath interface for initiating a contingent worker transaction. The 'UC Patent Acknowledgment' section is highlighted, showing the 'Patent Acknowledgment Sign Dt' field set to 11/13/2018. Below this, there is a 'Comments' text area. At the bottom of the form, the 'Transaction ID' is 'NEW', and the 'Requester ID' is '10095340' with the name 'Ima Gudadmin'.

Step	Action
33.	If necessary, scroll up to display the Job Data tab. Click the scroll bar.

UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Primary Name - English

*First Name Ignacio Middle Name
*Last Name Perro Name Suffix

Birth Information

Date of Birth 04/01/1987

Person National ID United States


National ID Type PR National ID 555229876

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

*Address Type Home Address Line 1 1234 Lakeshore Drive
Address Line 2 City Oakland
State CA *Postal Code 94610

Step	Action
34.	Click the Job Data tab. 

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Work Location - Job Fields

*Business Unit *Department
*Location Code

Job Information - Job Code

*Job Code

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

*Employee Classification

Job Information - Standard Hours

FTE

Work Location - Expected Job End Date

Expected Job End Date

Comments

Step	Action
35.	The fields in the Work Location - Job Fields section are required.
36.	Click in the Business Unit field. <input data-bbox="396 411 613 449" type="text"/>
37.	Enter the desired information into the Business Unit field.
38.	Click in the Department field. <input data-bbox="396 600 760 638" type="text"/>
39.	Enter the desired information into the Department field.
40.	Click in the Location Code field. <input data-bbox="396 789 760 827" type="text"/>
41.	Enter the desired information into the Location Code field.
42.	You must enter a valid contingent worker Job Code . Contingent worker job codes begin with CWR.
43.	Enter the desired information into the Job Code field.

**UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction**

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Work Location - Job Fields

*Business Unit UCOP1 *Department 814100
*Location Code KAISER

Job Information - Job Code

*Job Code CWR006

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

*Employee Classification

Job Information - Standard Hours

FTE

Work Location - Expected Job End Date

Expected Job End Date

Step	Action
44.	Click in the Reports To Position Number field. <input type="text"/>
45.	Enter the desired information into the Reports To Position Number field.

Smart HR Transactions
 Enter Transaction Information
 Click here to Hide Header Details

Template: UC_ADD_CWR Name:
 Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
 Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Work Location - Job Fields
 *Business Unit UCOP1 *Department 814100
 *Location Code KAISER

Job Information - Job Code
 *Job Code CWR006

Job Information - Reporting Information
 Reports To Position Number 40003278

Job Information - Employee Classification
 *Employee Classification

Job Information - Standard Hours
 FTE

Work Location - Expected Job End Date
 Expected Job End Date

Comments

Step	Action
46.	Click in the Employee Classification field. <input type="text"/>
47.	In the Employee Class field, enter 13 for staff CWRs or 14 for academic CWRs. Enter the desired information into the Employee Classification field.
48.	Click in the FTE field. <input type="text"/>
49.	Enter the desired information into the FTE field.

**UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction**

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR Name:
Effective Date: 11/13/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Work Location - Job Fields

*Business Unit UCOP1 *Department 814100
*Location Code KAISER

Job Information - Job Code

*Job Code CWR006

Job Information - Reporting Information

Reports To Position Number 40003278

Job Information - Employee Classification

*Employee Classification 13

Job Information - Standard Hours

FTE 1

Work Location - Expected Job End Date

Expected Job End Date

Comments

Step	Action
50.	<p>Scroll down to display additional fields and page functions.</p> <p>Click the scroll bar.</p>

Smart HR Transactions

*Business Unit UCOP1 *Department 814100
*Location Code KAISER

Job Information - Job Code

*Job Code CWR006

Job Information - Reporting Information

Reports To Position Number 40003278

Job Information - Employee Classification

*Employee Classification 13

Job Information - Standard Hours

FTE 1

Work Location - Expected Job End Date

Expected Job End Date

Comments

Comments

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW

Initiator Comments:

Step	Action
51.	In the Expected Job End Date field, enter the date on which the person's job assignment ends. Click in the Expected Job End Date field. <input type="text"/>
52.	Enter the desired information into the Expected Job End Date field.
53.	Use the Supporting documents link to attach supporting documents for the concurrent hire.
54.	Enter comments for the Approver in the Initiator Comments field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion. You can enter Initiator Comments on any of the tabs within this template.

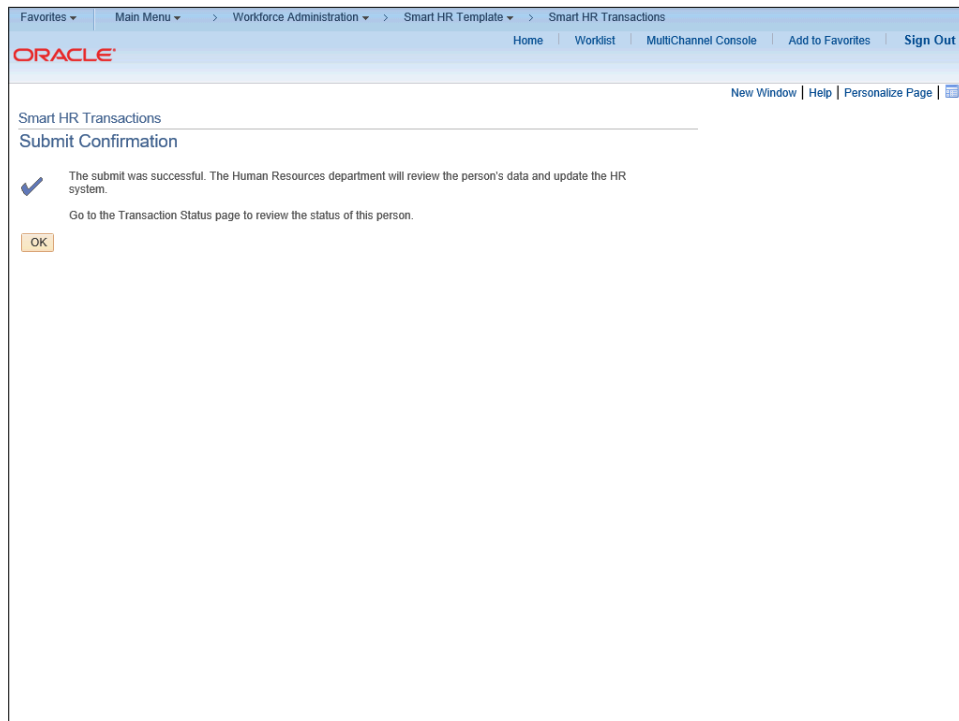
The screenshot shows the Oracle UCPATH PILOT interface for initiating a contingent worker transaction. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The Oracle logo is in the top left, and navigation links (Home, Worklist, MultiChannel Console, Add to Favorites, Sign Out) are in the top right. The form contains several sections:


- Business Unit:** UCOP1
- Department:** 814100
- Location Code:** KAISER
- Job Information - Job Code:** CWR006
- Job Information - Reporting Information:** Reports To Position Number: 40003278
- Job Information - Employee Classification:** Employee Classification: 13
- Job Information - Standard Hours:** FTE: 1.000000
- Work Location - Expected Job End Date:** Expected Job End Date: 03/29/2019
- Comments:** A large text area for entering comments.

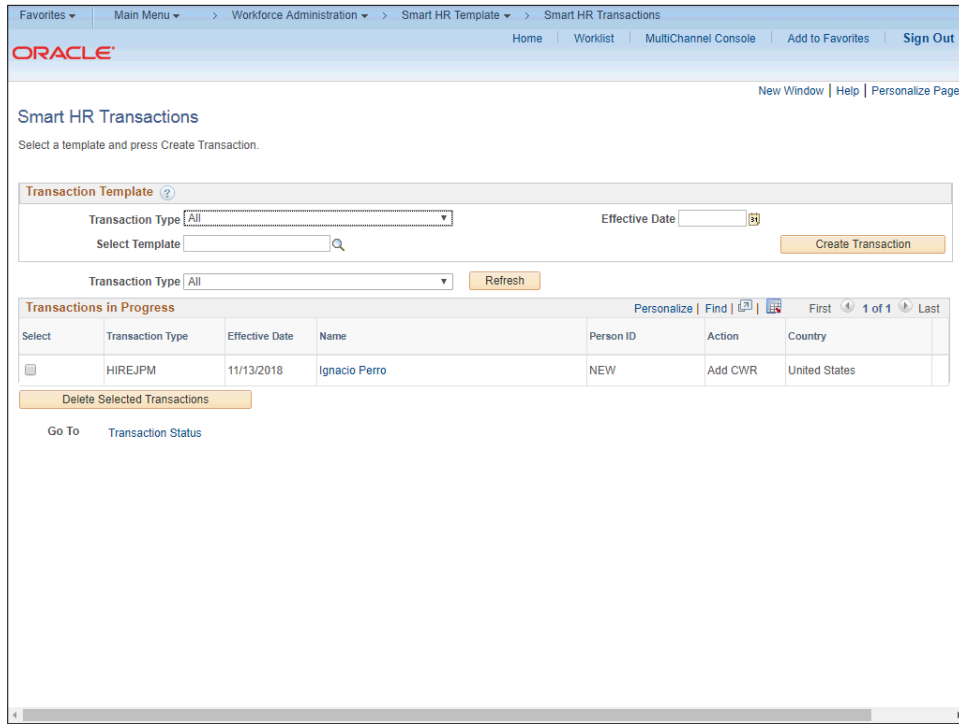
 At the bottom, there are buttons for 'Save and Submit', 'Save for Later', and 'Cancel', along with a 'Supporting documents' link. Below the buttons, the 'Transaction ID' is set to 'NEW' and there is an 'Initiator Comments' field.

Step	Action
55.	Click the Save and Submit button. <input type="button" value="Save and Submit"/>

**UCPath Task:
Initiate Add Contingent Worker (No Position)
Template Transaction**



Step	Action
56.	Click the OK button. 
57.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.



Step	Action
58.	You have initiated adding a contingent worker (no position) template transaction. End of Procedure.