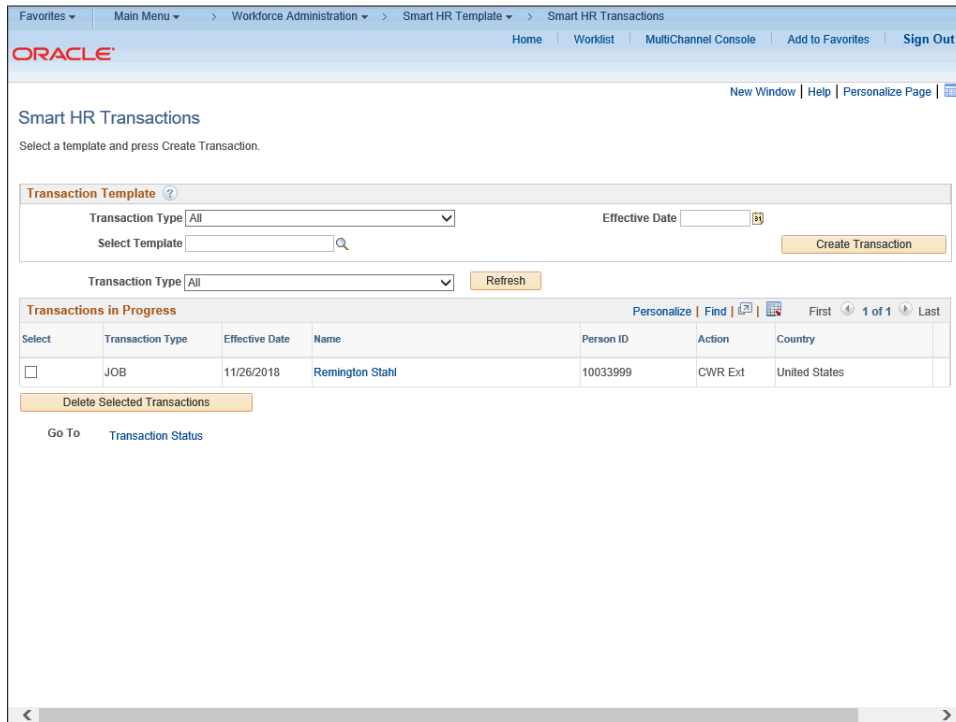



Use this task to initiate adding a contingent worker (with position) template transaction.

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

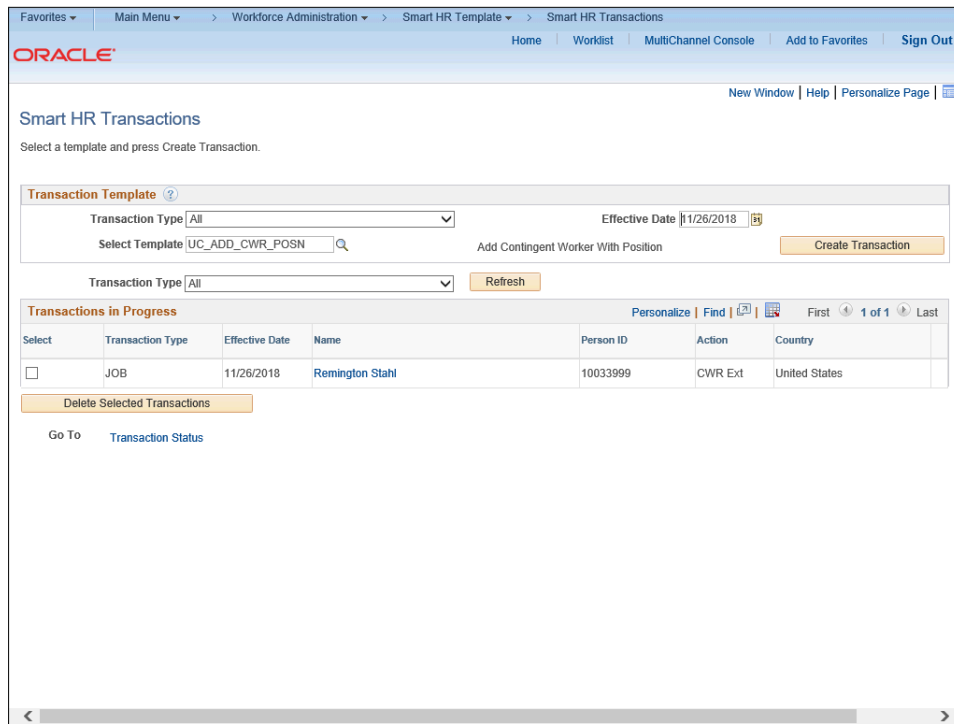
Note: This page also may be available in **Workcenter** depending on your security access.




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_POSN list item. UC_ADD_CWR_POSN

UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction

Step	Action
4.	Click in the Effective Date field. <input 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.	In the Job Effective Date field, enter the appropriate start date for the new contingent worker.


UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction

Smart HR Transactions
Enter Transaction Details

The following transaction details are required.

Template: Add Contingent Worker With Position
Organizational Relationship: Contingent Worker
*Employee ID: NEW
*Effective Date: 11/26/2018
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 *.

Smart HR Transactions
 Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR_POSN Name:
 Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contingent Worker)
 Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Primary Name - English

*First Name Middle Name
 *Last Name Name Suffix

Birth Information

Date of Birth

Person National ID United States

National ID Type National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

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

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 (With Position)
Template Transaction

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR_POSN Name:
Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birth Information

Date of Birth

Person National ID United States

National ID Type National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

*Address Type 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_POSN Name:
Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contigent Worker)
Employee ID: NEW Employee Record:

Personal Data Job Data

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birth Information

Date of Birth x |

Person National ID United States

National ID Type National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

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

Step	Action
18.	National ID is an optional 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 HR Transactions interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'Enter Transaction Information'. The form displays the following information:

- Template:** UC_ADD_CWR_POSN
- Effective Date:** 11/26/2018
- Employee ID:** NEW
- Name:** ADD/ADD (Add Contingent Worker)
- Action/Action Reason:** ADD/ADD (Add Contingent Worker)
- Employee Record:**

The form is divided into several sections:

- Employee Information:** Includes fields for Primary Name - English (First Name: Buffy, Middle Name, Last Name: Queen, Name Suffix).
- Birth Information:** Includes Date of Birth (04/01/1987).
- Person National ID United States:** Includes National ID Type (PR) and National ID (677118999).
- Person Alternate Employee ID:** Includes UC Location Match ID.
- Person Address 01 - United States:** Includes Address Type (Home), Address Line 1, Address Line 2, City, State, Postal Code, and County.

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

UCPath Task:
Initiate Add Contingent Worker (With 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.

The screenshot shows the Oracle UCPATH PILOT interface for entering transaction details. The 'UC Patent Acknowledgment' section is highlighted, showing the 'Patent Acknowledgment Sign Dt' field with the value '11/26/2018' and an unchecked 'Modified Patent Ackmnt Sign Dt' checkbox. Other visible fields include 'Date of Birth' (04/01/1987), 'National ID Type' (PR), 'National ID' (677118999), and 'Address Line 1' (1234 Lakeshore Drive).

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

UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR_POSN Name:
Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contingent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birth Information

Date of Birth

Person National ID United States

National ID Type National ID

Person Alternate Employee ID

UC Location Match ID

Person Address 01 - United States

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

Step	Action
33.	Click the Job Data tab. <input type="button" value="Job Data"/>

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR_POSN Name:
Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contingent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit Department
Location Code Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

Step	Action
34.	Click in the Position Number field. <input type="text"/>
35.	Enter a position number, which is associated with a job code that starts with CWR. For example, job code CWR003. When you press Tab to move out of the field or click in another field, the system populates all other fields, such as Business Unit, Department, Location and Establishment ID , based on the position number. Enter the desired information into the Position Number field.
36.	Press [Tab] to populate the position-related fields.
37.	Several fields automatically populate based on the selected position number. Ensure the Job Code begins with CWR .

Smart HR Transactions
 Enter Transaction Information

Click here to Hide Header Details

Template: UC_ADD_CWR_POSN Name:
 Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contingent Worker)
 Employee ID: NEW Employee Record:

Personal Data | Job Data

Employee Information

Work Location - Position Data
 *Position Number 40001852

Work Location - Job Fields
 Business Unit UCOP1 Department 821000
 Location Code FRANKLIN Establishment ID UCOP

Job Information - Job Code
 Job Code CWR019

Job Information - United States
 FLSA Status No FLSA Required

Job Labor - Union Code
 Union Code 99

Job Information - Reporting Information
 Reports To Position Number 40000876

Job Information - Employee Classification

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

UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction


Step	Action
39.	In the Employee Class field, enter 13 for staff CWRs or 14 for academic CWRs. Click in the Employee Classification field.
40.	Enter the desired information into the Employee Classification field.
41.	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"/>
42.	Enter the desired information into the Expected Job End Date field.
43.	Use the Supporting documents link to attach supporting documents for the concurrent hire.
44.	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.

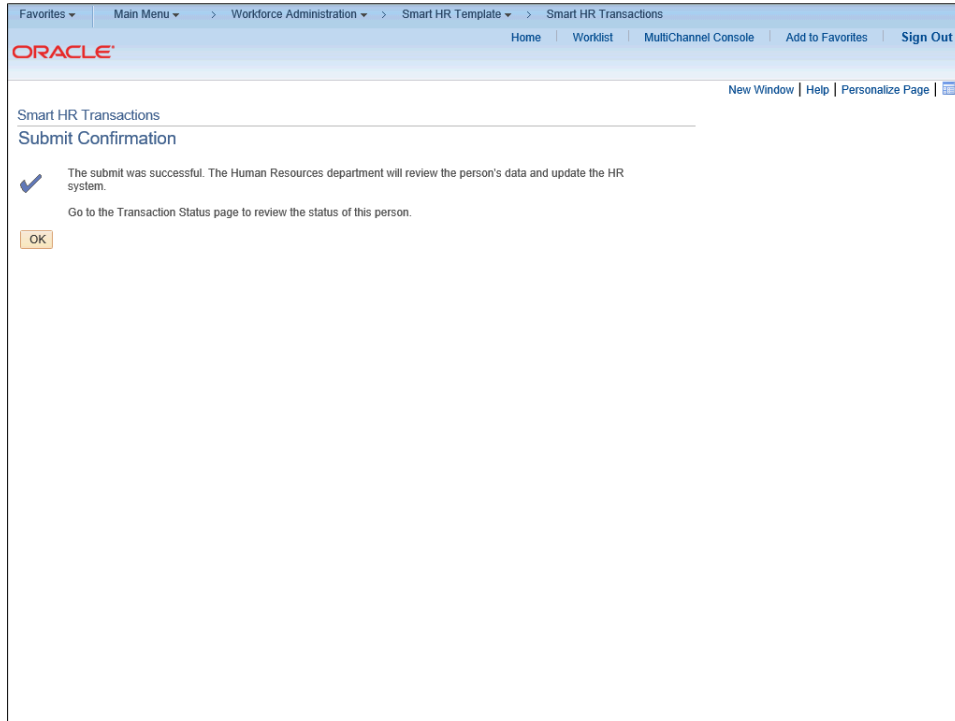
The screenshot displays the Oracle UCPath interface for initiating a contingent worker transaction. The breadcrumb trail shows: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'ORACLE' and navigation links include Home, Worklist, MultiChannel Console, Add to Favorites, and Sign Out.


The form is organized into several sections:

- Job Information - Job Code:** Job Code CWR019
- Job Information - United States:** FLSA Status No FLSA Required
- Job Labor - Union Code:** Union Code 99
- Job Information - Reporting Information:** Reports To Position Number 40000876
- Job Information - Employee Classification:** *Employee Classification 14, Classified/Unclassified Ind Not Applicable
- Work Location - Expected Job End Date:** Expected Job End Date 06/28/2019
- Comments:** A large text area for entering comments.

At the bottom, there are buttons for 'Return to Enter Transaction Details Page', 'Save and Submit', 'Save for Later', 'Cancel', and 'Supporting documents'. Below these buttons, the 'Transaction ID:' is 'NEW' and there is a text field for 'Initiator Comments:'.

Step	Action
45.	Click the Save and Submit button. 



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

UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction

Step	Action
48.	You have initiated adding a contingent worker (with position) template transaction. End of Procedure.