

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.

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]	JOB	11/26/2018	Remington Stahl	10033999	CWR Ext	United States
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Go To	Transaction Status					

Step	Action
1.	Use the <b>Smart HR Transactions</b> page to initiate a template transaction.
2.	Click the Look up Select Template button.
	Note: The Transaction Type field is not used by UC.
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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



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Step	Action
4.	Click in the Effective Date field.
5.	The <b>Effective Date</b> field is the effective date of the selected template action. The date you enter in this field automatically populates the <b>Effective Date</b> field on the <b>Enter Transaction Details</b> page. You can update the <b>Effective Date</b> on the <b>Enter Transaction Details</b> page if needed. Enter the desired information into the <b>Effective Date</b> field.

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	JOB	11/26/2018	Remington Stahl		10033999	CWR Ext	United States
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Go To							
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Step	Action
6.	Click the Create Transaction button. Create Transaction
7.	In the <b>Employee ID</b> field, accept the default value of <b>NEW</b> . 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 <b>Job Effective Date</b> field, enter the appropriate start date for the new contingent worker.



Favorites	Workforce Administration 🔹 > Smart HR Template 🔹 > Smart HR Transactions
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Smart HR Transactions	
Enter Transaction Details	
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Template	Add Contingent Worker With Position
Organizational Relationship	Contingent Worker
*Employee ID	NEW × Q
*Effective Date	11/26/2018
Action	Add Contingent Worker
Reason Code	Add Contigent Worker
*Address Format	United States
Continue Cancel	

Step	Action
9.	Click the <b>Continue</b> 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: <b>Personal Data</b> and <b>Job Data</b> . Fields that are required by the system are indicted with an asterisk *.

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Enter Transaction Information				
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Click here to Hide Header Details				
Femplate: UC_ADD_CWR_POSN Effective Date: 11/26/2018	Name: Action/Action Reason: AD	D/ADD (Add Contigent Worker)		
Employee ID: NEW	Employee Record:	bindbb (rad conligent frenkel)		
Personal Data Job Data				
Employee Information				
Primary Name - English				
*First Name		Middle Name		
*Last Name		Name Suffix	~	
			<u> </u>	
Birth Information				
Date of Birth	Ħ			
Person National ID United States				
National ID Type PR	Q	National ID		
	~	Nutonario		
Person Alternate Employee ID				
UC Location Match ID				
Person Address 01 - United States				
*Address Type Home	$\checkmark$	Address Line 1		
Address Line 2		City		
State				
State	Q	*Postal Code		
County				

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



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Smart HR Transactions				
Enter Transaction Info	rmation			
Click here to Hide Header	Details			
Template: UC_ADD_CWR	POSN Name:			
Effective Date: 11/26/2018		on: ADD/ADD (Add Contigent W	/orker)	
Employee ID: NEW	Employee Record:			
Personal Data Job Data				
Employee Information				
Primary Name - English				
*First Name Bu	ffy	Middle Name		
*Last Name Qu	1000	Name Suffix	~	
		Name Suma	•	
Birth Information				
Date of Birth	<b>B</b>			
Person National ID United	States			
National ID Type PR	٤ 🔍	National ID		
Person Alternate Employee	e ID			
UC Location Match ID				
Person Address 01 - United	d States			
*Address Type Ho	ome 🗸	Address Line 1		
Address Line 2		City		
State	Q	*Postal Code		
State	Q	Postal Code		
County				

Step	Action
17.	Enter the desired information into the <b>Date of Birth</b> field.

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Smart HR Trar	nsactions						r i
Enter Trans	saction Information						
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Template: Effective Date: Employee ID:	UC_ADD_CWR_POSN 11/26/2018 NEW	Name: Action/Action Reason: Employee Record:	ADD/ADD (Add Contigent W	orker)			
Personal Data	a Job Data						
Employee Infe	ormation						
Primary Nam	ne - English						
	*First Name Buffy		Middle Name				
	*Last Name Queen		Name Suffix	~			
Birth Informa	ation						
I	Date of Birth 04011987	×					
Person Natio	onal ID United States						
Nati	ional ID Type PR	٩	National ID				
Person Alter	mate Employee ID						
UC Locat	tion Match ID						
Person Addr	ress 01 - United States						
*A	ddress Type Home	<b>Y</b>	Address Line 1				
Ad	Idress Line 2		City				
	State	Q	*Postal Code				
	County						

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

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Smart HR Transactions					
Enter Transaction Information					
Click here to Hide Header Details					
Template: UC_ADD_CWR_POSN	Name:				
Effective Date: 11/26/2018 Employee ID: NEW	Action/Action Reason: Employee Record:	ADD/ADD (Add Contigent Worker)			
Employee ID: NEW	Employee Record:				
Personal Data Job Data					
Employee Information					
Primary Name - English					
*First Name Buffy		Middle Name			
*Last Name Queen		Name Suffix	~		
Birth Information					
Date of Birth 04/01/1987	Ħ				
Person National ID United States					
National ID Type PR	٩	National ID 677118999	×		
Person Alternate Employee ID					
UC Location Match ID					
Person Address 01 - United States					
*Address Type Home	<b>Y</b>	Address Line 1			
Address Line 2		City			
State	Q	*Postal Code			
County					

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



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Date of Birth 04/01/1987	31			
erson National ID United States				
National ID Type PR	٩	National ID 677118999		
Person Alternate Employee ID				
UC Location Match ID				
Person Address 01 - United States				
*Address Type Home		Address Line 1		
Address Line 2		City		
State	Q	*Postal Code		
County				
IC Patent Acknowledgment				
Patent Acknowledgment Sign Dt	31	Modified Pater	nt Ackmnt Sign Dt	
comments				
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eturn to Enter Transaction Details Page				
Save and Submit Save for La	ter Cancel	Supporting documents		
ansaction ID: NEW				

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

Step	Action
30.	In the <b>Patent Acknowledgment Sign Dt</b> 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 <b>Modified Patent Ackmnt Sign Dt</b> check box.

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Date of Birth 04/01/1987					^
Person National ID United States					
National ID Type PR	٩	National ID 677118999			
Person Alternate Employee ID					
UC Location Match ID					
Person Address 01 - United States					
*Address Type Home V		Address Line 1 1234 Lakeshore Driv	'e		
Address Line 2		City Oakland			- 1
State CA	Q	*Postal Code 94610			_
County					_
UC Patent Acknowledgment					
Patent Acknowledgment 11/26/2018 × Sign Dt		Modified Patent	Ackmnt Sign Dt		
Comments					
Comments					
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Return to Enter Transaction Details Page					
Save and Submit Save for Later	Cancel	Supporting documents			
Transaction ID: NEW					- 1
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Step	Action
32.	If necessary, scroll up to display the Job Data tab.
	Click the scroll bar.



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Femplate: UC_ADD_CWR_POS Effective Date: 11/26/2018		ADD/ADD (Add Contigent Worker)		
Employee ID: NEW	Employee Record:			
Personal Data Job Data				
Employee Information				
Primary Name - English				
*First Name Buffy		Middle Name		
*Last Name Queen		Name Suffix	7	
Birth Information				
Date of Birth 04/01/19	87 関			
Date of Birth 04/01/19	107 11			
Person National ID United State	s			
National ID Type PR	٩	National ID 677118999		
Person Alternate Employee ID				
UC Location Match ID				
Person Address 01 - United Stat	tes			
*Address Type Home	$\checkmark$	Address Line 1 1234 Lakeshore D	rive	
Address Line 2		City Oakland		
State CA	Q	*Postal Code 94610		
	~	Postal Code 94010		
County				

Step	Action
33.	Click the <b>Job Data</b> tab.
	Job Data

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Smart HR Transactions			- 1
Enter Transaction Infor	mation		
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			
Work Location - Position Da			
*Position Number	Q		
Work Location - Job Fields			
Business Unit	Department		
Location Code	Establishment ID Q		
Job Information - Job Code			
Job Code			
Job Information - United Sta	ates		
FLSA Status	$\checkmark$		
Job Labor - Union Code			
Union Code			
Job Information - Reporting	Information		
Reports To Position Number			
Job Information - Employee	Classification		

Step	Action
34.	Click in the <b>Position Number</b> field.
35.	Enter a position number, which is associated with a job code that starts with CWR. For example, job code CWR003.
	When you press <b>Tab</b> to move out of the field or click in another field, the system populates all other fields, such as <b>Business Unit</b> , <b>Department</b> , <b>Location</b> and <b>Establishment ID</b> , based on the position number.
	Enter the desired information into the <b>Position Number</b> 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.

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mployee ID: NEW	Employee Record:	ADDIADD (Aud Conligent Worker)			
Personal Data Job Data					
mployee Information					
Work Location - Position Data					
*Position Number 4000	1852 🔍				
Work Location - Job Fields					
Business Unit UCOF	P1	Department 821000			
Location Code FRAM	IKLIN	Establishment ID UCOP	٩		
Job Information - Job Code					
Job Code CWR	019				
Job Information - United State	es				
FLSA Status No FI	LSA Required V				
Job Labor - Union Code					
Union Code 99					
Job Information - Reporting I	nformation				
Reports To Position 40000 Number	1876				
Job Information - Employee (	Classification				

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



Step	Action			
39.	In the <b>Employee Class</b> field, enter <b>13</b> for staff CWRs or <b>14</b> for academic CWRs.			
	Click in the <b>Employee Classification</b> field.			
40.	Enter the desired information into the <b>Employee Classification</b> field.			
41.	In the <b>Expected Job End Date</b> field, enter the date on which the person's job assignment ends.			
	Click in the Expected Job End Date field.			
42.	Enter the desired information into the <b>Expected Job End Date</b> field.			
43.	Use the <b>Supporting documents</b> 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 <b>Initiator Comments</b> on any of the tabs within this template.			

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	Job Code CV							
Job Informati	ion United St	atos						
		FLSA Required	$\sim$					
Job Labor - U	Inion Code							
	Union Code 99							
Job Informati	ion Reportin	a Information						
	To Position 40	-						
	Number							
		e Classification						
*Employee CI	lassification 14	Q		Classified/Unclassifie	Not Applicable	¥		
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Work Locatio	on - Expected ob End Date 06							
Comments	ob Elite Dute 00	20/2010						
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Save and	Submit	Save for Later	Cancel	Supporting document	s			
Transaction ID:								
	NEW							
Initiator Comme	nts:							
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Step	Action				
45.	Click the Save and Submit button.				
	Save and Submit				

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Smart	t HR Transactions
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✓	The submit was successful. The Human Resources department will review the person's data and update the HR system.
	Go to the Transaction Status page to review the status of this person.
OK	
	-

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



Transact	ion Template 👔					
	Transaction Type			Effective Date	31	
	Select Template		Q			Create Transaction
	Transaction Type All		~	Refresh		
Transact	ions in Progress			Personalize	Find   🗖   🔣	First 🕚 1-2 of 2 🕑 Last
elect	Transaction Type	Effective Date	Name	Person ID	Action	Country
	JOB	11/26/2018	Remington Stahl	10033999	CWR Ext	United States
	HIREJPM	11/26/2018	Buffy Queen	NEW	Add CWR	United States
Go To	ele Selected Transaction:	3				

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