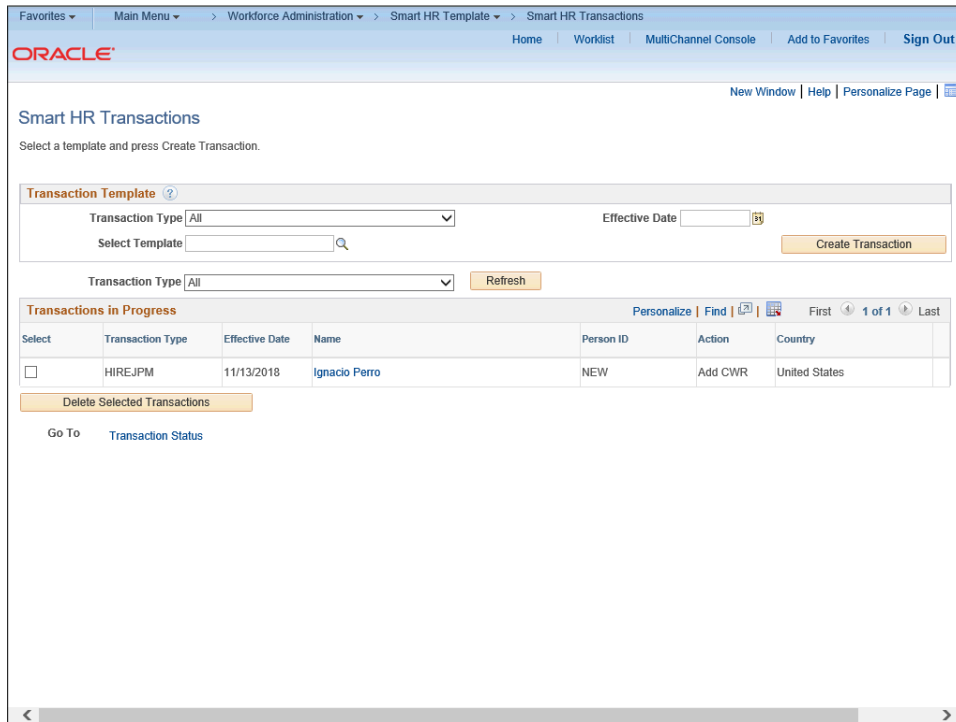



Use this task to initiate an extend contingent worker (with position) template transaction.

**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 <b>Smart HR Transactions</b> page to initiate a template transaction.
2.	Click the <b>Look up Select Template</b> button.  <b>Note:</b> The <b>Transaction Type</b> field is not used by UC. 
3.	Select the appropriate extend contingent worker template. Notice there are two extend contingent worker templates, one for contingent workers with a position and one for those without position data.  Click the <b>UC_EXT_CWR_POSN</b> list item. <a href="#">UC_EXT_CWR_POSN</a>

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

Step	Action
4.	Click in the <b>Effective Date</b> field. <input type="text"/>
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.
6.	Click the <b>Create Transaction</b> button. <input type="button" value="Create Transaction"/>

The screenshot shows the Oracle Smart HR Transactions interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'Smart HR Transactions' and the sub-header is 'Enter Transaction Details'. Below this, it states 'The following transaction details are required.' The form fields are: Template (Extend CWR (with Position) Appointment), Organizational Relationship (Contingent Worker), \*Employee ID (input field with a search icon), \*Employment Record Number (dropdown menu), \*Effective Date (11/19/2018 with a calendar icon), Action (Contingent Worker Extension), and Reason Code (Contingent Worker Extension). At the bottom, there are 'Continue' and 'Cancel' buttons.

Step	Action
7.	Click in the <b>Employee ID</b> field. <input type="text"/>
8.	In the <b>Employee ID</b> field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPATH department access.  Enter the desired information into the <b>Employee ID</b> field.

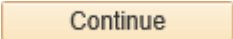
UCPath Task:  
Initiate Extend Contingent Worker (With Position)  
Template Transaction

Smart HR Transactions  
Enter Transaction Details

The following transaction details are required.

Template: Extend CWR (with Position) Appointment  
 Organizational Relationship: Contingent Worker  
 \*Employee ID: 10130617 Sydney Queen  
 \*Employment Record Number: 0 (Visiting Scholar)  
 \*Effective Date: 11/19/2018  
 Action: Contingent Worker Extension  
 Reason Code: Contingent Worker Extension

Continue Cancel

Step	Action
9.	The <b>Employment Record Number</b> defaults to the CWR's first record number based on your department security access. Select the correct <b>Employment Record Number</b> for the job you are extending.
10.	The <b>Effective Date</b> is populated based on your entry on the previous page. Ensure this is the date on which the contingent worker's employment extension begins.
11.	Click the <b>Continue</b> button. 

Smart HR Transactions  
 Enter Transaction Information

Click here to Hide Header Details

Template: UC\_EXT\_CWR\_POSN    Name: Sydney Queen  
 Effective Date: 11/19/2018    Action/Action Reason: CWE/CWE (Contingent Worker Extension)  
 Employee ID: 10130617    Employee Record: 0 (Visiting Scholar)

Return to Enter Transaction Details Page

Save and Submit    Save for Later    Cancel

**Job Data**

**Work Location - Position Data**  
 \*Position Number

**Work Location - Expected Job End Date**  
 Expected Job End Date

**Work Location - Job Fields**  
 Business Unit     Department   
 Location Code

**Comments**  
 Comments

Return to Enter Transaction Details Page

Step	Action
12.	The extend contingent worker template appears.  The top of the page displays header data, which you can show/hide as needed.
13.	Click in the <b>Position Number</b> field.  <input type="text"/>
14.	<b>Position Number</b> is a required field. Always enter the existing position number from the person's job data, unless the extension is accompanied by a change in position number. The position number must be associated with a job code that starts with CWR. For example, job code CWR001.  Enter the desired information into the <b>Position Number</b> field.
15.	Click in the <b>Expected Job End Date</b> field.  <input type="text"/>
16.	In the <b>Expected Job End Date</b> field, enter the date on which employment for the selected position is scheduled to end. This date must be greater than the transaction effective date.  Enter the desired information into the <b>Expected Job End Date</b> field.

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

The screenshot shows the Oracle Smart HR Transactions interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is "Smart HR Transactions" and the sub-header is "Enter Transaction Information". There is a link to "Click here to Hide Header Details".

Transaction Details:

- Template: UC\_EXT\_CWR\_POSN
- Effective Date: 11/19/2018
- Employee ID: 10130617
- Name: Sydney Queen
- Action/Action Reason: CWE/CWE (Contingent Worker Extension)
- Employee Record: 0 (Visiting Scholar)

Buttons: "Return to Enter Transaction Details Page", "Save and Submit", "Save for Later", "Cancel".


Job Data Section:

- Work Location - Position Data:** \*Position Number: 40069160
- Work Location - Expected Job End Date:** Expected Job End Date: 03/29/2019
- Work Location - Job Fields:** Business Unit: RVCMP, Department: D01046, Location Code: P5323
- Comments:** A text area for entering comments.

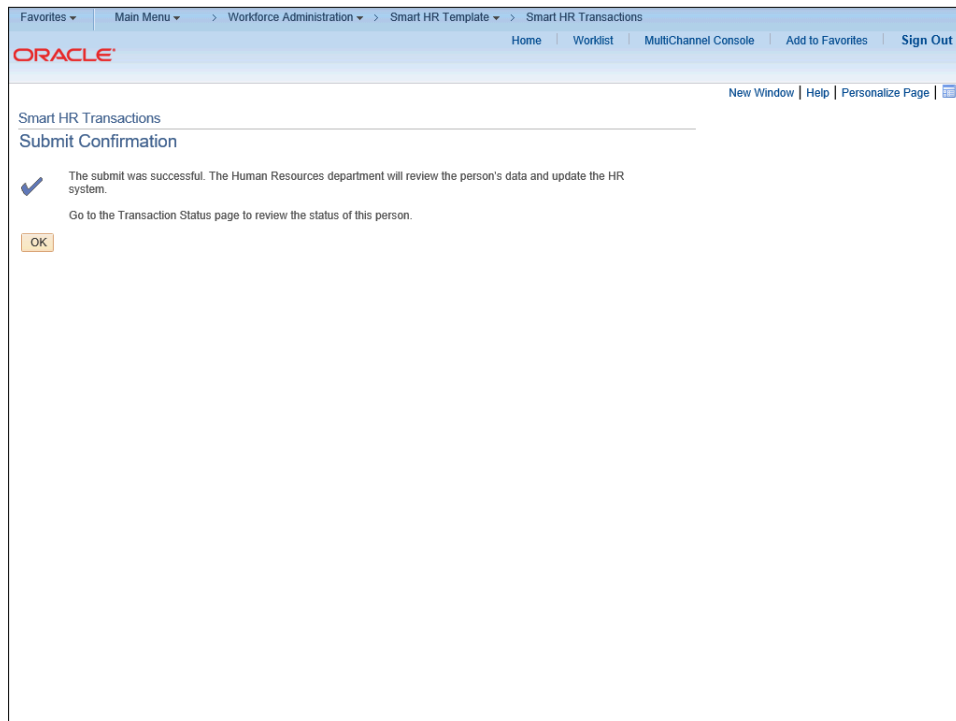
At the bottom, there is a link: "Return to Enter Transaction Details Page".

Step	Action
17.	The <b>Work Location - Job Fields</b> default from the position number.
18.	Use the <b>Comments</b> field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction.
19.	If necessary, scroll down to display additional fields and page functions. Click the scroll bar.

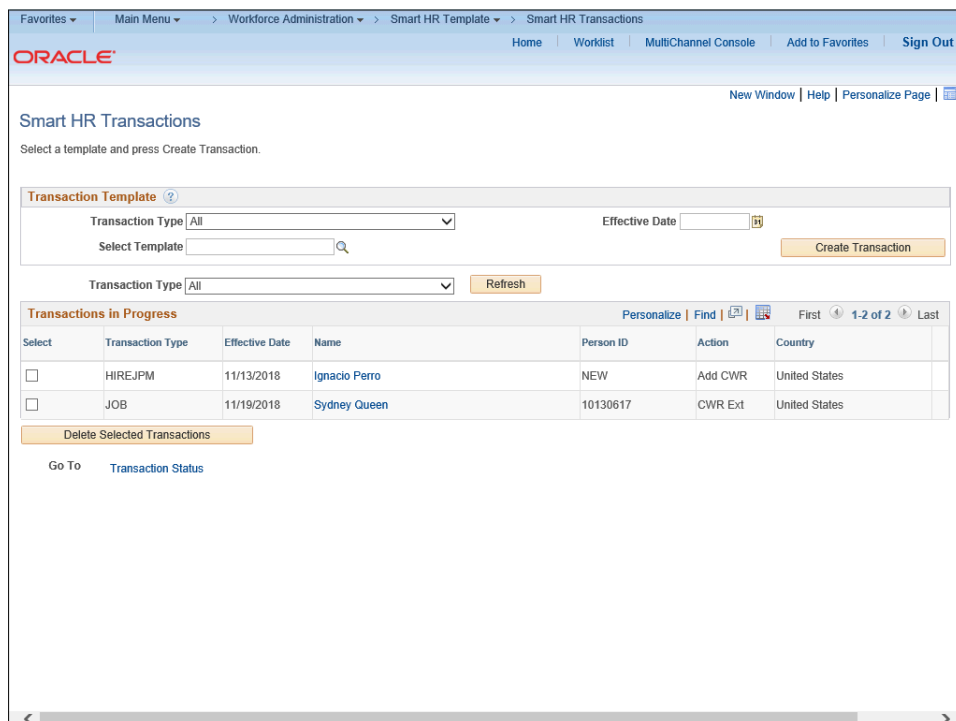
Oracle UCPATH PILOT interface showing transaction details for an Extend Contingent Worker. The page includes fields for Effective Date, Employee ID, Action/Reason, and Employee Record. It also features sections for Job Data (Position Number, Expected Job End Date), Job Fields (Business Unit, Department, Location Code), and a Comments field. Navigation buttons like 'Save and Submit', 'Save for Later', and 'Cancel' are visible.

Step	Action
20.	Use the <b>Supporting documents</b> link to attach supporting documents.
21.	Enter comments for the Approver in the <b>Initiator Comments</b> 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.
22.	Click the <b>Save and Submit</b> button.  <div style="text-align: center;">  </div>

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



Step	Action
23.	Click the <b>OK</b> button.





Step	Action
24.	The template transaction is routed for approval and appears in the <b>Transactions in Progress</b> section until it is processed.
25.	You have initiated an extend contingent worker (with position) template transaction. <b>End of Procedure.</b>