Job Aid: Contingent (CWR) Hires

Use this process to add a new Contingent Worker (CWR) to UCPath. CWRs, usually consultants or short-term hires, may not be paid directly by the UC; however, they still require an Employee ID (**EMPL ID**) and Job Record (**EMPL Recs**) in UCPath.

1. Collect required data

Before you begin, you will need the following CWR information: Legal Name, Address, Department, Job Code, Effective Date and Employee Classification. It may also be helpful to collect the External System ID Name and External System Number.

See the *Reference Guide for Hires* for more information on hiring.

2. Navigate to the appropriate tile in UCPath

Navigation: Workforce Administration (Homepage) > Manage Human Resources (Tile) > **Create Contingent Worker (Tile)**.

> ⚠ Location transactors with the role **ULSHR_HR_WFA_INQUIRY** will have view access to the **Manage Human Resources (Tile) > Organizational Relationship (Tile)** but will be unable to transact.
>
> To ensure you have the correct permissions to transact, see *Reference Guide for Hires*.

3. Search to verify the person is not in the system

You can search for the person using the search page provided in this process or use **Person Organization Summary**. Refer to the *View Person Organization Summary* simulation for more information.

In the search fields, enter one of the following:

- **Legal Name**: Most CWRs do not have a Social Security Number (SSN) on record; using their first and last legal name is the best search practice.
- **National ID** (SSN) is the only field needed if used.

> ⚠ If you need additional windows open to do other UCPath activities, open them before starting the process. Select **New Window** from the **Actions** ⋮ drop-down list.

4. Review results and determine action

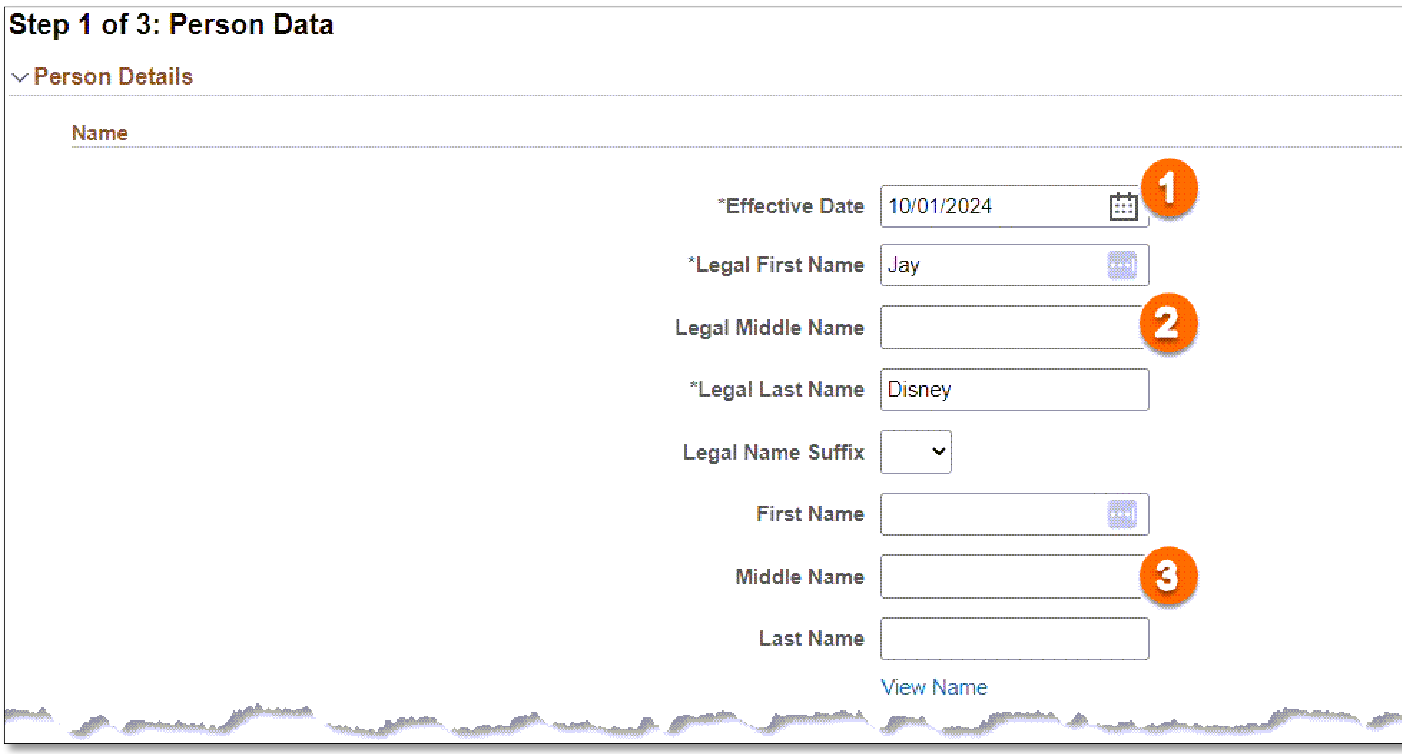
There are two potential categorical outcomes of your search:

- **No matches found**
  - If no results are returned, click the **Continue** button in the **Request Details** box that is displayed and proceed to step 5.
  - If results are returned but none match the new hire, click the **Create Contingent Worker** button and then the **Continue** button in the **Request Details** box. Proceed to step 5.

- **Match found**
  - If an existing row matches the new hire, confirm this is the correct person, and then click the **Organizational Relationship** link from within the matching row to enter job data. Click the **Add Contingent Worker Relationship** button to add the new CWR relationship. Proceed to step 6.
  - If an existing row matches the new hire but the **Organizational Relationship** link is inactive, navigate to **HR Tasks (Tile)** > **Person Organization Summary** to confirm that there is no organizational relationship. Then, navigate to Manage Human Resources (Tile) > **Organizational Relationship (Tile)** to add a new organizational relationship. Proceed to step 6.

5. Enter Person Data

Required fields include Effective Date, Legal Name, and Address. To avoid downstream duplication errors, include other non-required fields you might have. See the *Reference Guide for Hires* for more information on optional fields in this section.



#	Field Name and Description
1	Select the **Effective Date** defaults to <today> and is the date this person is added to the system. The **Effective Date** in the **Person Data** section can be back-dated up to 30 days but cannot be future-dated and cannot be later than the Contingent Worker appointment date.
2	**Legal First** and **Last Name** auto-populates if initially entered on the **Search** page.

3	**First Name, Middle Name, Last Name** are the names the person wants to be known as, see important note below.

Legal Name identifies a person for legal or certain official purposes. In UCPath, the **Legal Name** filed is always labeled "**Legal Name**". Its presentation and use are restricted to protect confidentiality.

The **Name** fields are the self-chosen or personal and/or preferred professional names used instead of **Legal Names**. The **Name** fields (First, Middle & Last) are the data typically returned in searches and reports throughout the system, while the **Legal Name** fields are usually reserved for legal documentation such as W-2s, tax forms, etc. If **Name** is not entered, it is defaulted from **Legal Name**.

- Enter Social Security Number if known, **Birthdate**, **Address**, USA or international. For State, enter the full state name, **phone**, **email address,** etc.

Click the **Next** button to run validation.

If there are data issues, **Validation Messages** appear.

- **Errors** cause hard stops and must be corrected before continuing. Correct and then click the **Next** button to rerun validation.
- **Warnings** are informational and can be accepted without any action taken. However, you should review the warnings and ensure they are acceptable. After warnings have been reviewed and no additional changes are necessary, select the **Proceed with warning** check box and then click the **Next** button to proceed.

If there are no **Validation Messages**, the next section, **Job Data**, displays.

- Review any messages displayed and take corrective actions if needed, then click the **Next** button to re-run validation.
- After resolving all errors and carefully reviewing all warnings, click the **Proceed with warning** check box and then the **Next** button to continue.

If the **Person Data** passes validation, an **EMPL ID** is created and assigned to the employee, no approval is needed.

The **EMPL ID** is now created and added to the system; no approval is required. You can use the **Previous** button to return to the **Person Data** section and correct any field, including **Effective Date**. This data cannot be updated in **Manage Human Resources** once the transaction is submitted for approval. If the transaction is cancelled, changes can be made until you exit the transaction.

Copy the **EMPL ID** for later reference if needed.

Refer to the *Job Aid: Manage Human Resources Errors and Warnings* for more information.

6. Enter Job Data

Required fields include Effective Date, Department, Job Code and Employee Class. See the *Reference Guide for Hires* for more information on optional fields in this section.

> ⚠ If you clicked the active **Organizational Relationship** link as noted in step 4, select the Action Reason of **Add Contingent Worker** in the drop-down list and then click the **Continue** button within the **Add Contingent Worker Relationship** pop-up window.

- **Effective Date** in the **Job Data** section is the date the CWR relationship begins. Defaults to today's date; must be equal to or greater than the date the Person's ID (**EMPL ID**) was created.
- **Department** is the functional work group that the individual belongs to, for example Legal Affairs, Chancellors Office, Finance, Payroll and so forth.
- **Job Code** is the job code that matches the type of contingent worker.
- **Employee Class** can be either **Academic Contingent Worker** or **Staff Contingent Worker** appointments.

Click the **Next** button in the upper right corner of the page to run validation.

If there are data issues, **Validation Messages** appear.

- **Errors** cause hard stops and must be corrected before continuing. Correct these and then click the **Next** button to rerun validation.
- **Warnings** are informational and can be accepted without any action taken. However, you should review the warnings and ensure they are acceptable. After warnings have been reviewed and no additional changes are necessary, select the **Proceed with warning** check box and then click the **Next** button to proceed.

  Refer to the *Job Aid: Manage Human Resources Errors and Warnings* for more information.

7. Review the Summary and Submit

- Review and ensure that the information is complete and accurate.
- Review the **Effective Date** fields for both **Person Data** and **Job Data**. Remember, this data cannot be updated in **Manage Human Resources** once the transaction is submitted for approval.
- If corrections are needed, click the **Previous** button to return to the previous steps and correct as appropriate. If there are issues with updating data, record the **EMPL ID**, exit out of the transaction instead of submitting for approval and then go to **Organizational Relationship** and add the **Job Data** there with the correct data.
- To complete the process, click the **Submit** button.
  - The **Comments** box appears. Enter any useful or applicable comments, then click the **Submit** button to continue.
  - The transaction is automatically routed for approval.

- The **Submit Confirmation** page appears next, listing the Approvers. The transaction is now routed for approval per the **Approval Chain** list, which can include multiple Approvers. The submitter will receive an email notification about the transaction and additional emails as the transaction moves through the approval process. Refer to the *Job Aid: Hire Approval Process* for more information.

If your Location requires approvals, when approved, the process is completed. The new contingent worker relationship is now added and the CWR has a new job record (**EMPL Rec**).