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

**Navigation:** Menu > Workforce Administration > Smart HR Template > Smart HR Transactions OR Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > Smart HR Transactions

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<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>1.</td>
<td>Use the <strong>Smart HR Transactions</strong> page to initiate a template transaction.</td>
</tr>
</tbody>
</table>
| 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
4. 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.

   Click in the **Effective Date** field.

5. Enter the desired information into the **Effective Date** field.

   For this example, enter **11/26/2018**.
Step 6. Click the **Create Transaction** button.

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

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<tbody>
<tr>
<td>7.</td>
<td>In the <strong>Employee ID</strong> field, accept the default value of <strong>NEW</strong>. 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.</td>
</tr>
<tr>
<td>8.</td>
<td>In the <strong>Effective Date</strong> field, enter the appropriate start date for the new contingent worker. If necessary, click the <strong>Cancel</strong> button to return to the previous page and correct the <strong>Effective Date</strong>.</td>
</tr>
</tbody>
</table>

### Smart HR Transactions

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**: 1/12/24
- **Address Format**: United States

<table>
<thead>
<tr>
<th>Action</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue</td>
<td>Cancel</td>
</tr>
</tbody>
</table>

9. The **Address Format** field defaults to **United States**. If the employee has an international address, select the **Global** option.

For this example, the **Address Format** of **United States** is selected.

10. Click the **Continue** button.
Step | Action
--- | ---
11. | The add contingent worker template appears. Header details appear above the tabs. You can show/hide the header information as needed.
12. | 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 13
Click in the **Legal First Name** field.

### Step 14
Enter the desired information into the **Legal First Name** field.

For this example, enter **Buffy**.

### Step 15
Click in the **Legal Last Name** field.

### Step 16
Enter the desired information into the **Legal Last Name** field.

For this example, enter **Queen**.

### Step 17
Click in the **Date of Birth** field.

### Step 18
Enter the desired information into the **Date of Birth** field.

For this example, enter **04011987**.

### Step 19
National ID is an optional for a contingent worker.

Click in the **National ID** field.
### UCPath Task:
Initiate Add Contingent Worker (With Position)
Template Transaction

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<tr>
<td>20.</td>
<td>Enter the individual's social security number in the <strong>National ID</strong> field. For this example, enter <strong>67718999</strong>.</td>
</tr>
<tr>
<td>21.</td>
<td>Scroll down to display additional fields and page functions. Click the scroll bar.</td>
</tr>
</tbody>
</table>

Based on the **Address Format** you selected when initiating the template transaction, this section will display as either **Person Address 01 - United States** or **Person Address 01 - Global**.
### Step 23. Note:

If the **Address Format** selected was **Global** (for employees that have an international address), this section would display as **Person Address 01 - Global**.
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<thead>
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</table>
| 24.  | For this example, the **Address Format** selected was **United States**. Complete the **Person Address 01 - United States** section.  
Click in the **Address Line 1** field. |
| 25.  | Enter the desired information into the **Address Line 1** field.  
For this example, enter **1234 Lakeshore Drive**. |
| 26.  | Click in the **City** field. |
| 27.  | Enter the desired information into the **City** field.  
For this example, enter **Oakland**. |
| 28.  | Click in the **State** field. |
| 29.  | Enter the desired information into the **State** field.  
For this example, enter **CA**. |
| 30.  | Click in the **Postal Code** field. |
| 31.  | Enter the desired information into the **Postal Code** field.  
For this example, enter **94610**. |
| 32.  | Click in the **Patent Acknowledgment Sign Dt** field. |
| 33.  | In the **Patent Acknowledgment Sign Dt** field, enter the date on which the individual signed the UC patent acknowledgement.  
For this example, enter **11/26/2018**. |
| 34.  | If applicable, to indicate the person did not originally sign the standard Patent Acknowledgment form, select the **Modified Patent Ackmnt Sign Dt** check box. |
### Step 35.
If necessary, scroll up to display the **Job Data** tab.

Click the scroll bar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>36.</td>
<td>Click the <strong>Job Data</strong> tab.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Job Data" /></td>
</tr>
</tbody>
</table>

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<tr>
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<tbody>
<tr>
<td>37.</td>
<td>Click in the <strong>Position Number</strong> field.</td>
</tr>
</tbody>
</table>

38. 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. For this example, enter **40001852**.

39. Press **[Tab]** to populate the position-related fields.

40. Several fields automatically populate based on the selected position number.

   Ensure the **Job Code** begins with CWR.
Step | Action
--- | ---
41. | Scroll down to display additional fields and page functions.  
   | Click the scroll bar.
42. | In the Employee Class field, enter **13** for staff CWRs or **14** for academic CWRs.  
   | Click in the Employee Classification field.
43. | Enter the desired information into the Employee Classification field.  
   | For this example, enter **14**.
44. | 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.
45. | Enter the desired information into the Expected Job End Date field.  
   | For this example, enter **06/28/2019**.
### Smart HR Transactions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Information - Job Code</td>
<td></td>
</tr>
<tr>
<td>Job Information - United States</td>
<td>FLA Status: No FLA Required</td>
</tr>
<tr>
<td>Job Labor - Union Code</td>
<td></td>
</tr>
<tr>
<td>Job Information - Reporting Information</td>
<td>Reports To Position: Manager</td>
</tr>
<tr>
<td>Job Information - Employee Classification</td>
<td></td>
</tr>
</tbody>
</table>

### UC Job Data
- [ ] Complete

### Work Location - Expected Job End Date
- Expected Job End Date: 09/25/2024
- [ ] End Job Automatically

### Step | Action
---|---
46. | **When the End Job Automatically** check box is selected, UCPath will insert a "Termination/Job Record End Date - Auto Term" row to a Contingent Worker Record (CWR) with an expired job.
47. | Use the **Supporting documents** link to attach supporting documents for the concurrent hire.
48. | Scroll down to display additional fields and page functions.
  - Click the scroll bar.
49. | 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.
**Step** | **Action**
---|---
50. | **Click the Save and Submit button.**

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**Smart HR Transactions**

**Submit Confirmation**

- The submits were 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 the person.

**OK**
51. Click the OK button.

52. The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.

53. You have initiated adding a contingent worker (with position) template transaction. **End of Procedure.**