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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<td>Use the <strong>Smart HR Transactions</strong> page to initiate a template transaction.</td>
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| 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**
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| 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**. |
| 6.   | Click the **Create Transaction** button.  
   ![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 **Effective Date** field, enter the appropriate start date for the new contingent worker. If necessary, click the **Cancel** button to return to the previous page and correct the **Effective Date**. |
| 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.  
   ![Continue Button] |
| 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 *. |
| 13.  | Click in the **Legal First Name** field.  
   ![Legal First Name Field] |
| 14.  | Enter the desired information into the **Legal First Name** field.  
   For this example, enter **Buffy**. |
| 15.  | Click in the **Legal Last Name** field.  
   ![Legal Last Name Field] |
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| 16. | Enter the desired information into the **Legal Last Name** field.  
For this example, enter **Queen**. |
| 17. | Click in the **Date of Birth** field. |
| 18. | Enter the desired information into the **Date of Birth** field.  
For this example, enter **04011987**. |
| 19. | National ID is an optional for a contingent worker.  
Click in the **National ID** field. |
| 20. | Enter the individual's social security number in the **National ID** field.  
For this example, enter **677118999**. |
| 21. | Scroll down to display additional fields and page functions.  
Click the scroll bar. |
| 22. | 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**. |
| 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**. |
| 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**. |
<p>| 28. | Click in the <strong>State</strong> field. |</p>
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| 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. |
| 35.  | If necessary, scroll up to display the **Job Data** tab.  
      Click the scroll bar. |
| 36.  | Click the **Job Data** tab.  
      ![Job Data](Image) |
| 37.  | Click in the **Position Number** field. |
| 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**. |
| 41.  | Scroll down to display additional fields and page functions.  
      Click the scroll bar. |
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| 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**. |
| 46.  | When the **End Job Automatically** check box is selected, UCPath will insert a "Termination/Job Record End Date - Auto Term" row to a Contignent 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. |
| 50.  | Click the **Save and Submit** button. |
| 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**. |