


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**

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 add contingent worker template. Notice there are two add contingent worker templates, one for adding a contingent worker <u>with</u> a position and one for adding a contingent worker <u>without</u> position data.  Click the <b>UC_ADD_CWR_POSN</b> list item. <a href="#">UC_ADD_CWR_POSN</a>

**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions  
Select a template and press Create Transaction.

**Transaction Template** Effective Date

Transaction Type  Add Contingent Worker With Position

Select Template

Transaction Type

**Transactions in Progress** Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/26/2018	Remington Stahl	10033999	CWR Ext	United States

Go To [Transaction Status](#)

Step	Action
4.	<p>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.</p> <p>Click in the <b>Effective Date</b> field.</p> <div style="border: 1px solid #ccc; width: 80px; height: 20px; margin-left: 20px;"></div>
5.	<p>Enter the desired information into the <b>Effective Date</b> field.</p> <p>For this example, enter <b>11/26/2018</b>.</p>

**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions  
Select a template and press Create Transaction.

**Transaction Template** Effective Date 11/26/2018

Transaction Type: All Add Contingent Worker With Position **Create Transaction**

Select Template: UC\_ADD\_CWR\_POSN

Transaction Type: All

**Transactions in Progress** Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/26/2018	Remington Stahl	10033999	CWR Ext	United States

Go To [Transaction Status](#)

Step	Action
6.	Click the <b>Create Transaction</b> button. <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Create Transaction"/> </div>

**Smart HR Transactions** New Window | Help | Personalize Page

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: 11/26/2018

Action: Add Contingent Worker

Reason Code: Add Contingent Worker

\*Address Format: United States

Step	Action
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>Effective Date</b> field, enter the appropriate start date for the new contingent worker. If necessary, click the <b>Cancel</b> button to return to the previous page and correct the <b>Effective Date</b> .

**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions  
[Enter Transaction Details](#)

The following transaction details are required.

Template Add Contingent Worker With Position  
Organizational Relationship Contingent Worker

\*Employee ID

\*Effective Date

Action Add Contingent Worker  
Reason Code Add Contingent Worker

\*Address Format

Step	Action
9.	The <b>Address Format</b> field defaults to <b>United States</b> . If the employee has an international address, select the <b>Global</b> option.  For this example, the <b>Address Format</b> of <b>United States</b> is selected.
10.	Click the <b>Continue</b> button.  <input type="button" value="Continue"/>

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

**Template:** UC\_ADD\_CWR\_POSN      **Name:**  
**Effective Date:** 11/26/2018      **Action/Action Reason:** ADD/ADD (Add Contingent Worker)  
**Employee ID:** NEW      **Employee Record:**

**Employee Information**

**Name - Legal Name/Name**

\*Legal First Name       Legal Middle Name   
\*Legal Last Name       Legal Suffix    
First Name       Middle Name   
Last Name

**Birth Information**

Date of Birth

**Person National ID United States**

National ID Type        National ID

**Person Address 01 - United States**

\*Address Type        Address Line 1   
Address Line 2       City   
State        \*Postal Code   
County

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

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[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**

**Name - Legal Name/Name**

\*Legal First Name       Legal Middle Name   
\*Legal Last Name       Legal Suffix    
First Name       Middle Name   
Last Name

**Birth Information**

Date of Birth

**Person National ID United States**

National ID Type        National ID

**Person Address 01 - United States**

\*Address Type       Address Line 1   
Address Line 2       City   
State        \*Postal Code   
County

Step	Action
13.	Click in the <b>Legal First Name</b> field. <input type="text"/>
14.	Enter the desired information into the <b>Legal First Name</b> field. For this example, enter <b>Buffy</b> .
15.	Click in the <b>Legal Last Name</b> field. <input type="text"/>
16.	Enter the desired information into the <b>Legal Last Name</b> field. For this example, enter <b>Queen</b> .
17.	Click in the <b>Date of Birth</b> field. <input type="text"/>
18.	Enter the desired information into the <b>Date of Birth</b> field. For this example, enter <b>04011987</b> .
19.	National ID is an optional for a contingent worker. Click in the <b>National ID</b> field. <input type="text"/>

Step	Action
20.	Enter the individual's social security number in the <b>National ID</b> field.  For this example, enter <b>677118999</b> .
21.	Scroll down to display additional fields and page functions.  Click the scroll bar.

The screenshot displays the 'Smart HR Transactions' form. At the top, the 'Date of Birth' is set to 04/01/1987. Below this is the 'Person National ID United States' section, where 'National ID Type' is 'PR' and 'National ID' is '677118999'. The 'Person Address 01 - United States' section includes fields for 'Address Type' (Home), 'Address Line 1', 'Address Line 2', 'City', 'State', 'Postal Code', and 'County'. The 'Person Phone Number' section shows a table with one entry for 'Telephone' and 'Preferred'. The 'Person Email Address' section shows a table with one entry for 'Email Address'. Below these are sections for 'UC Patent Acknowledgment' (with 'Patent Acknowledgment Sign Dt' and 'Modified Patent Ackmnt Sign Dt' checkboxes) and 'UC External System ID' (with 'Business Unit' and 'External System' dropdowns). At the bottom is a 'Comments' section with a text area.

Step	Action
22.	Based on the <b>Address Format</b> you selected when initiating the template transaction, this section will display as either <b>Person Address 01 - United States</b> or <b>Person Address 01 - Global</b> .

**Smart HR Transactions**

Date of Birth 04/01/1987

**Person National ID United States**

National ID Type PR National ID 677118999

**Person Address 01 - United States**

\*Address Type Home Address Line 1  
Address Line 2 City  
State \*Postal Code  
County

**Person Phone Number** Personalize Find View All First 1 of 1 Last

Phone Type Telephone Preferred  
1

**Person Email Address** Personalize Find View All First 1 of 1 Last

Email Type Email Address  
1

**UC Patent Acknowledgment**

Patent Acknowledgment Sign Dt Modified Patent Ackmnt Sign Dt

**UC External System ID**

Business Unit External System  
External System ID

**Comments**

Comments

Step	Action
23.	<b>Note:</b> If the <b>Address Format</b> selected was <b>Global</b> (for employees that have an international address), this section would display as <b>Person Address 01 - Global</b> .

**Smart HR Transactions**

Date of Birth 04/01/1987

**Person National ID United States**

National ID Type PR National ID 677118999

**Person Address 01 - United States**

\*Address Type Home Address Line 1  
Address Line 2 City  
State \*Postal Code  
County

**Person Phone Number** Personalize Find View All First 1 of 1 Last

Phone Type Telephone Preferred  
1

**Person Email Address** Personalize Find View All First 1 of 1 Last

Email Type Email Address  
1

**UC Patent Acknowledgment**






Patent Acknowledgment Sign Dt Modified Patent Ackmnt Sign Dt

**UC External System ID**

Business Unit External System  
External System ID

**Comments**

Comments

Step	Action
24.	<p>For this example, the <b>Address Format</b> selected was <b>United States</b>. Complete the <b>Person Address 01 - United States</b> section.</p> <p>Click in the <b>Address Line 1</b> field.</p> 
25.	<p>Enter the desired information into the <b>Address Line 1</b> field.</p> <p>For this example, enter <b>1234 Lakeshore Drive</b>.</p>
26.	<p>Click in the <b>City</b> field.</p> 
27.	<p>Enter the desired information into the <b>City</b> field.</p> <p>For this example, enter <b>Oakland</b>.</p>
28.	<p>Click in the <b>State</b> field.</p> 
29.	<p>Enter the desired information into the <b>State</b> field.</p> <p>For this example, enter <b>CA</b>.</p>
30.	<p>Click in the <b>Postal Code</b> field.</p> 
31.	<p>Enter the desired information into the <b>Postal Code</b> field.</p> <p>For this example, enter <b>94610</b>.</p>
32.	<p>Click in the <b>Patent Acknowledgment Sign Dt</b> field.</p> 
33.	<p>In the <b>Patent Acknowledgment Sign Dt</b> field, enter the date on which the individual signed the UC patent acknowledgement.</p> <p>For this example, enter <b>11/26/2018</b>.</p>
34.	<p>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.</p>

**Smart HR Transactions**

Date of Birth 04/01/1987

**Person National ID United States**  
National ID Type PR National ID 677118999

**Person Address 01 - United States**  
\*Address Type Home Address Line 1 1234 Lakeshore Drive  
Address Line 2 City Oakland  
State CA \*Postal Code 94610  
County

**Person Phone Number** Personalize | Find | View All | First 1 of 1 Last  
Phone Type Telephone Preferred  
1

**Person Email Address** Personalize | Find | View All | First 1 of 1 Last  
Email Type Email Address  
1

**UC Patent Acknowledgment**  
Patent Acknowledgment Sign Dt 11/26/2018 Modified Patent Ackmt Sign Dt

**UC External System ID**  
Business Unit External System  
External System ID

**Comments**  
Comments

Step	Action
35.	If necessary, scroll up to display the <b>Job Data</b> tab.  Click the scroll bar.

**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions  
Enter Transaction Information  
[Click here to Hide Header Details](#)

Template: UC\_ADD\_CWR\_POSN      Name:      Action/Action Reason: ADD/ADD (Add Contingent Worker)  
Effective Date: 11/26/2018      Employee Record:  
Employee ID: NEW

Personal Data | Job Data

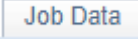
**Employee Information**

**Name - Legal Name/Name**  
\*Legal First Name Buffy Legal Middle Name  
\*Legal Last Name Queen Legal Suffix  
First Name Middle Name  
Last Name

**Birth Information**  
Date of Birth 04/01/1987

**Person National ID United States**  
National ID Type PR National ID 677118999

**Person Address 01 - United States**  
\*Address Type Home Address Line 1 1234 Lakeshore Drive  
Address Line 2 City Oakland  
State CA \*Postal Code 94610  
County

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

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC\_ADD\_CWR\_POSN      Name:      Action/Action Reason: ADD/ADD (Add Contingent Worker)  
 Effective Date: 11/26/2018      Employee Record:  
 Employee ID: NEW

Personal Data | **Job Data**

**Employee Information**

**Work Location - Position Data**

\*Position Number

**Work Location - Job Fields**

Business Unit       Department   
 Location Code       Establishment ID

**Job Information - Job Code**

Job Code

**Job Information - United States**

FLSA Status

**Job Labor - Union Code**

Union Code

**Job Information - Reporting Information**

Reports To Position Number

**Job Information - Employee Classification**

Step	Action
37.	Click in the <b>Position Number</b> field. <input type="text"/>
38.	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. For this example, enter <b>40001852</b> .
39.	Press [ <b>Tab</b> ] to populate the position-related fields.
40.	Several fields automatically populate based on the selected position number.  Ensure the <b>Job Code</b> begins with <b>CWR</b> .

**Smart HR Transactions**

New Window | Help | Personalize Page

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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      **Action/Action Reason:** ADD/ADD (Add Contigent Worker)  
**Employee ID:** NEW      **Employee Record:**

**Employee Information**

**Work Location - Position Data**

\*Position Number

**Work Location - Job Fields**

Business Unit       Department   
 Location Code       Establishment ID

**Job Information - Job Code**

Job Code

**Job Information - United States**

FLSA Status

**Job Labor - Union Code**

Union Code

**Job Information - Reporting Information**

Reports To Position Number

**Job Information - Employee Classification**

Step	Action
41.	Scroll down to display additional fields and page functions.  Click the scroll bar.
42.	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. <input type="text"/>
43.	Enter the desired information into the <b>Employee Classification</b> field.  For this example, enter <b>14</b> .
44.	In the <b>Expected Job End Date</b> field, enter the date on which the person's job assignment ends.  Click in the <b>Expected Job End Date</b> field. <input type="text"/>
45.	Enter the desired information into the <b>Expected Job End Date</b> field.  For this example, enter <b>06/28/2019</b> .

**Smart HR Transactions**

**Job Information - Job Code**  
Job Code CWR019

**Job Information - United States**  
FLSA Status No FLSA Required

**Job Labor - Union Code**  
Union Code 99

**Job Information - Reporting Information**  
Reports To Position Number 40000876

**Job Information - Employee Classification**  
\*Employee Classification 14 Classified/Unclassified Ind Not Applicable


**UC Job Data**  
Cubicle

**Work Location - Expected Job End Date**  
Expected Job End Date 06/28/2019  End Job Automatically

**Comments**  
Comments

Return to Enter Transaction Details Page  
   [Supporting documents](#)

Transaction ID: NEW

Step	Action
46.	When the <b>End Job Automatically</b> 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 <b>Supporting documents</b> 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 <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. You can enter <b>Initiator Comments</b> on any of the tabs within this template.

**Smart HR Transactions**

**Job Information - United States**  
FLSA Status

**Job Labor - Union Code**  
Union Code

**Job Information - Reporting Information**  
Reports To Position Number

**Job Information - Employee Classification**  
\*Employee Classification  Classified/Unclassified   
Ind

**UC Job Data**  
Cubicle

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

**Comments**  
Comments

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID:

Initiator Comments:


Step	Action
50.	Click the <b>Save and Submit</b> button. <input type="button" value="Save and Submit"/>

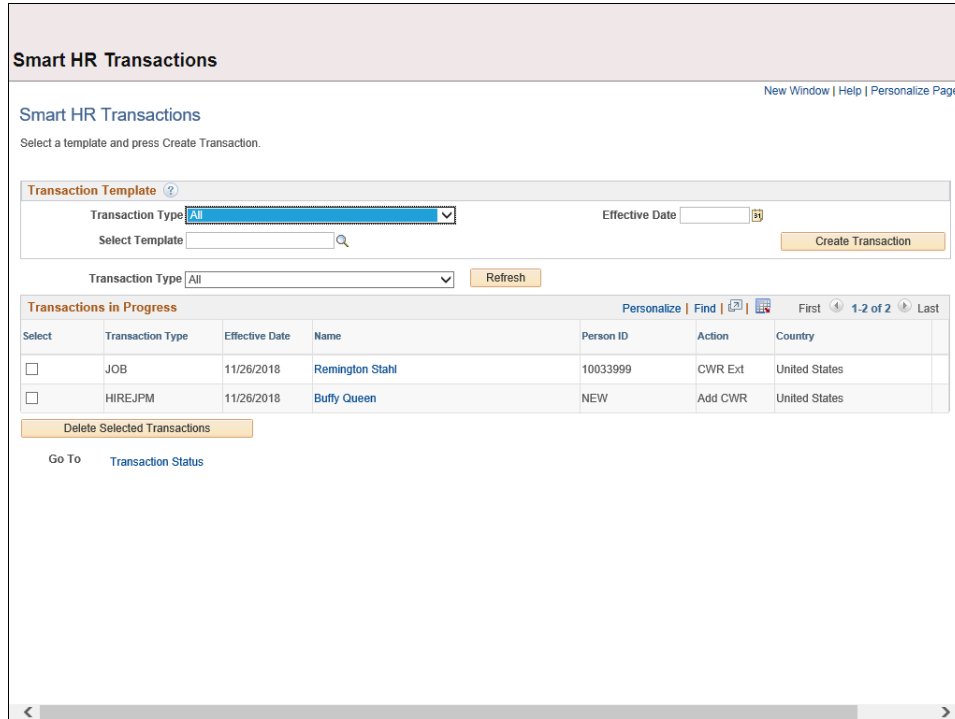
**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions

**Submit Confirmation**

✓ 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.

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





**Smart HR Transactions** New Window | Help | Personalize Page

Smart HR Transactions  
Select a template and press Create Transaction.

**Transaction Template** ?

Transaction Type: All Effective Date:   
 Select Template:  Create Transaction

Transaction Type: All Refresh

**Transactions in Progress** Personalize | Find |  |  First 1-2 of 2 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/26/2018	Remington Stahl	10033999	CWR Ext	United States
<input type="checkbox"/>	HIREJPM	11/26/2018	Buffy Queen	NEW	Add CWR	United States

Delete Selected Transactions

Go To [Transaction Status](#)

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