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**

<table>
<thead>
<tr>
<th>Step</th>
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</thead>
<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
Step | Action
--- | ---
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**.
UCPath Task: Initiate Add Contingent Worker (With Position) Template Transaction

6. Click the **Create Transaction** button.

---

**Step** | **Action**
--- | ---
6. | **Click the Create Transaction button.**

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Last changed on: 6/26/24
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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**

The following transaction details are required.

- **Template**: Add Contingent Worker With Position
- **Organizational Relationship**: Contingent Worker
- **Employee ID**: NEW
- **Effective Date**: 7/29/2023
- **Reason Code**: Add Contingent Worker
- **Address Format**: Selected United States

**Step** | **Action** |
<table>
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<th></th>
<th></th>
</tr>
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<tbody>
<tr>
<td>9.</td>
<td>The <strong>Address Format</strong> field defaults to <strong>United States</strong>. If the employee has an international address, select the <strong>Global</strong> option. For this example, the <strong>Address Format</strong> of <strong>United States</strong> is selected.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Continue</strong> button.</td>
</tr>
</tbody>
</table>
### Step 11
The add contingent worker template appears. Header details appear above the tabs. You can show/hide the header information as needed.

### Step 12
The add contingent worker template includes two tabs: **Personal Data** and **Job Data**.

Fields that are required by the system are indicated 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.
### Step 20.
Enter the individual's social security number in the **National ID** field.
For this example, enter **677118999**.

### Step 21.
Scroll down to display additional fields and page functions.
Click the scroll bar.

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

Click the scroll bar.
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<tr>
<td>36.</td>
<td>Click the <strong>Job Data</strong> tab.</td>
</tr>
</tbody>
</table>

### Smart HR Transactions

**Template Transaction**

**Initiate Add Contingent Worker (With Position)**

**UCPath Task:**

**UCPath**

**Initiate Add Contingent Worker (With Position)**

**Template Transaction**

- **Template:** UC_ADD_CWR_P001
- **Effective Date:** 11/36/24
- **Maintain Position:** NEW

#### Personal Data

- **Employee ID:**
- **Position Number:**
- **Business Unit:**
- **Department:**
- **Location Code:**
- **Establishment ID:**

#### Work Location - Position Data

- **Location Code:**

#### 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


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<td>37.</td>
<td>Click in the <strong>Position Number</strong> field.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter a position number, which is associated with a job code that starts with CWR. For example, job code CWR003.</td>
</tr>
</tbody>
</table>

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 41
Scroll down to display additional fields and page functions.
Click the scroll bar.

### Step 42
In the **Employee Class** field, enter 13 for staff CWRs or 14 for academic CWRs.
Click in the **Employee Classification** field.

### Step 43
Enter the desired information into the **Employee Classification** field.
For this example, enter 14.

### Step 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.

### Step 45
Enter the desired information into the **Expected Job End Date** field.
For this example, enter 06/28/2019.
### Step 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.

### Step 47
Use the **Supporting documents** link to attach supporting documents for the concurrent hire.

### Step 48
Scroll down to display additional fields and page functions.

Click the scroll bar.

### Step 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 50.** Click the **Save and Submit** button.

[Save and Submit]
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.**