


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 Smart HR Transactions page to initiate a template transaction. |
| 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 <u>with</u> a position and one for adding a contingent worker <u>without</u> position data. Click the UC_ADD_CWR_POSN list item. UC_ADD_CWR_POSN |

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

Select Template | UC_ADD_CWR_POSN Create Transaction

Transaction Type | All Refresh


Transactions in Progress Personalize | Find | 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 |

Delete Selected Transactions

Go To [Transaction Status](#)

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



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 x | Q

*Effective Date 11/26/2018

Action Add Contingent Worker

Reason Code Add Contingent Worker

*Address Format United States

Continue Cancel

| Step | Action |
|------|---|
| 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 . |

Smart HR Transactions

Smart HR Transactions New Window | Help | Personalize Page

[Enter Transaction Details](#)

The following transaction details are required.

Template Add Contingent Worker With Position

Organizational Relationship Contingent Worker

*Employee ID NEW x

*Effective Date 11/26/2018

Action Add Contingent Worker

Reason Code Add Contingent Worker

*Address Format United States

| Step | Action |
|------|---|
| 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. <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 PR National ID

Person Address 01 - United States

*Address Type Home 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: Personal Data and Job Data . 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 Legal First Name field. <input type="text"/> |
| 14. | Enter the desired information into the Legal First Name field. For this example, enter Buffy . |
| 15. | Click in the Legal Last Name field. <input type="text"/> |
| 16. | Enter the desired information into the Legal Last Name field. For this example, enter Queen . |
| 17. | Click in the Date of Birth field. <input type="text"/> |
| 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. <input type="text"/> |

| Step | Action |
|------|--|
| 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. |

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 also shows a table with one entry for 'Email Address'. Below these are sections for 'UC Patent Acknowledgment' (with '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 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 . |

Smart HR Transactions

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

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. | Note: If the Address Format selected was Global (for employees that have an international address), this section would display as Person Address 01 - Global . |

Smart HR Transactions

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

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 Address Format selected was United States. Complete the Person Address 01 - United States section.</p> <p>Click in the Address Line 1 field.</p>  |
| 25. | <p>Enter the desired information into the Address Line 1 field.</p> <p>For this example, enter 1234 Lakeshore Drive.</p> |
| 26. | <p>Click in the City field.</p>  |
| 27. | <p>Enter the desired information into the City field.</p> <p>For this example, enter Oakland.</p> |
| 28. | <p>Click in the State field.</p>  |
| 29. | <p>Enter the desired information into the State field.</p> <p>For this example, enter CA.</p> |
| 30. | <p>Click in the Postal Code field.</p>  |
| 31. | <p>Enter the desired information into the Postal Code field.</p> <p>For this example, enter 94610.</p> |
| 32. | <p>Click in the Patent Acknowledgment Sign Dt field.</p>  |
| 33. | <p>In the Patent Acknowledgment Sign Dt field, enter the date on which the individual signed the UC patent acknowledgement.</p> <p>For this example, enter 11/26/2018.</p> |
| 34. | <p>If applicable, to indicate the person did not originally sign the standard Patent Acknowledgment form, select the Modified Patent Ackmnt Sign Dt 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 Ackmnt 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 Job Data 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:
Effective Date: 11/26/2018 Action/Action Reason: ADD/ADD (Add Contingent Worker)
Employee ID: NEW Employee Record:

Personal Data | Job Data

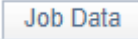
Employee Information

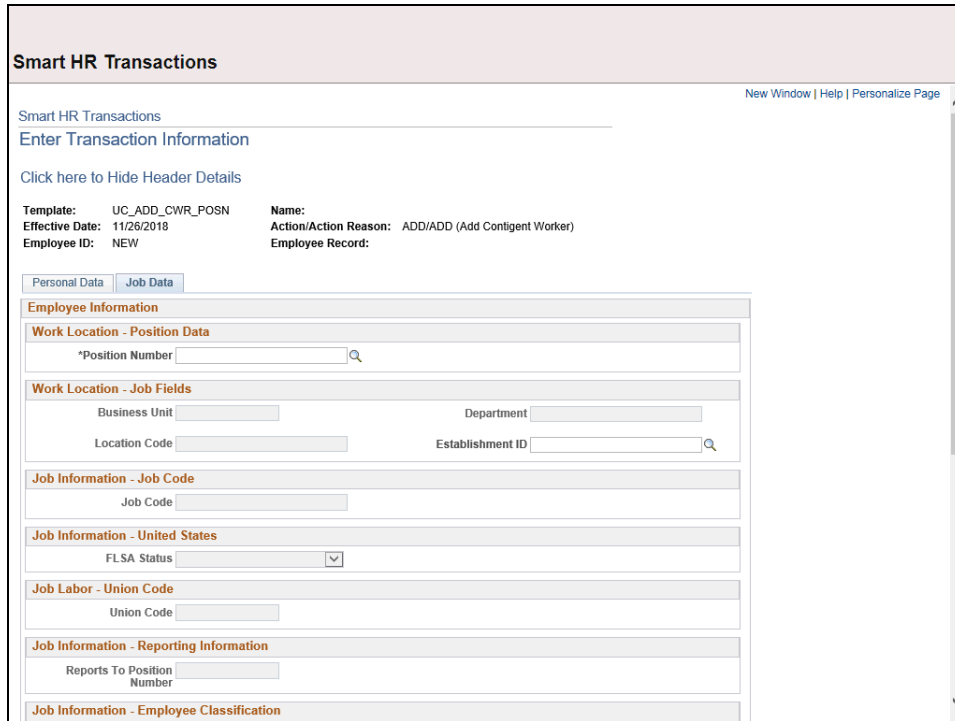
Name - Legal Name/Name
*Legal First Name Buffy Legal Middle Name
*Legal Last Name Queen Legal Suffix
First Name Middle Name
Last Name

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 Job Data 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 Position Number 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 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 . |

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

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 Employee Class field, enter 13 for staff CWRs or 14 for academic CWRs. Click in the Employee Classification field. <input type="text"/> |
| 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. <input type="text"/> |
| 45. | Enter the desired information into the Expected Job End Date field. For this example, enter 06/28/2019 . |

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 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. |

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 Save and Submit button. <div style="text-align: center; border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;"> <input type="button" value="Save and Submit"/> </div> |

Smart HR Transactions


New Window | Help | Personalize Page

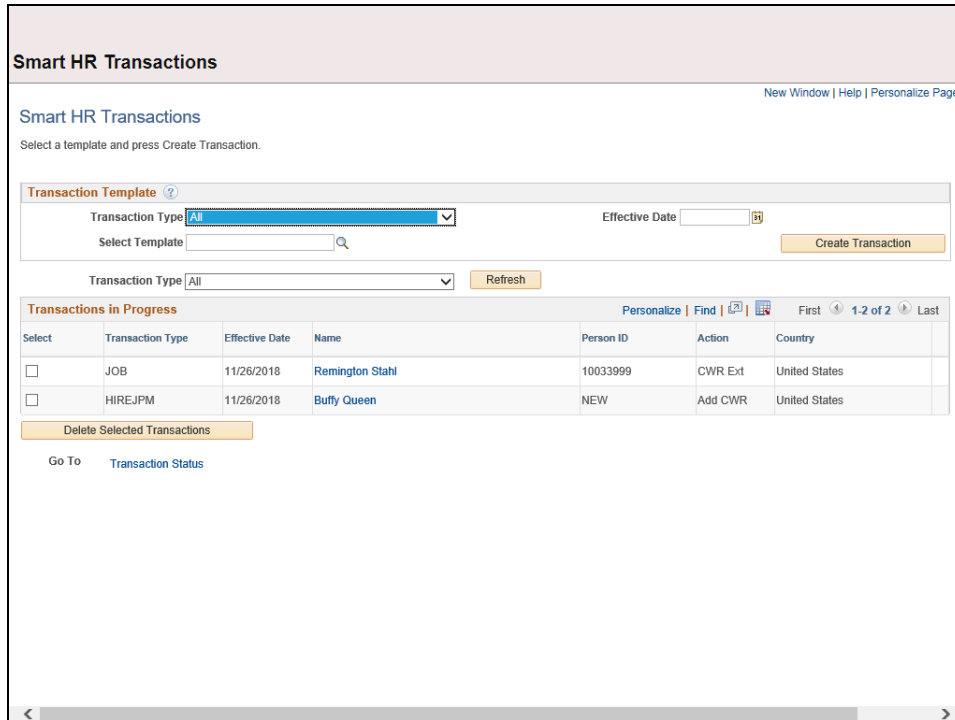
Smart HR Transactions

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 OK button.  |
| 52. | The template transaction is routed for approval and appears in the Transactions in Progress 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: Effective Date:

Select Template:

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 |

Go To [Transaction Status](#)

| Step | Action |
|------|---|
| 53. | You have initiated adding a contingent worker (with position) template transaction. End of Procedure. |