



State of Wisconsin

Department of Administration

Adding a Contingent Worker (CWR)

New ADD

Purpose

This Job Aid will assist Agency Specialists entering an ADD row for a Contingent Worker

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Definition

There are three different types of instances that may be added in PeopleSoft:

- Employee (EMP)
 - Any person who receives remuneration for services rendered to the state under an employer-employee relationship directly paid by the State of Wisconsin.
- Contingent Worker (CWR)
 - Any person who is paid by a third-party vendor for contracted services provided to the state.
- Person of Interest (POI)
 - Any *unpaid* person of interest to the state. Examples of this type of organizational relationship could be a volunteer or intern.

This Job Aid is focused on a Contingent Worker (CWR). If the above definition for CWR does not apply to the person you are adding, please use the Job Aid appropriate for your person.

Position Maintenance

Ensure Position Data is Updated

NOTE: Most CWR records do not have a position number. This section only applies if your CWR has a position number.

Navigation: Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

Prior to entering a new ADD row into PeopleSoft the Agency Position Management Specialist will request updates to the position. This is done through the Position Request form. More information is available in the [Reviewing Position and Funding Data](#) Job Aid and [Maintain Position Data](#) Job Aid.

CWRs should not be added into positions that have not been evaluated by the Agency Position Management Specialist.

Ensure information such as Reports To, Department ID, Location, funding, etc. are all updated on the position *prior* to filling it. If updates are not made prior to filling it, you must submit a JIRA ticket to have the position updates made. Do not add position data rows to make corrections to a position that should have been made prior to filling it.

Search For an Existing Person

It is important to look up employee names in PeopleSoft prior to entering a hire to ensure that they aren't already in the system. Search for People is one way that an agency can view data about employees who are in other agencies.

Navigation: Main Menu > Workforce Administration > Personal Information > Search for People

The screenshot shows the 'Search/Match' interface in PeopleSoft. At the top, there is a header 'Search/Match' and a sub-header 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a button 'Find an Existing Value'. The main section is titled 'Search Criteria' and contains several fields. A red box labeled '1' highlights the 'Search Type' dropdown set to '=' and the 'Person' dropdown. Another red box labeled '2' highlights the 'Search Parameter' dropdown set to 'begins with' and the text input field containing 'PSCS_ADHOC'. A third red box labeled '3' highlights the 'Search' button. Below the 'Search' button are links for 'Basic Search' and 'Save Search Criteria'.

Search/Match

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search Type = Person 1

Search Parameter begins with PSCS_ADHOC 2

Ad Hoc Search ☐

Description begins with

Search 3 Basic Search Save Search Criteria

1. **Search Type** = Person
2. **Search Parameter** = PSCS_ADHOC
3. Click **Search**

Search Criteria

Search Type: Person ☐ Ad Hoc Search

Search Parameter: PSCS_ADHOC CS_Person Adhoc Search

Search Result Rule ⓘ

4 Search Result Code: PERSON_DATA 6

User Default

Search Criteria ⓘ

Search Fields	Value
5 First Name Search	SARA <input type="button" value="Search"/>
Last Name Search	JONES <input type="button" value="Search"/>

Search by Order Number ⓘ

Search Order	Description
10	CS_AdHoc Search

4. **Search Result Code = PERSON_DATA**
 1. Additional options are available to return various data for purposes other than determining if a person exists
 2. Refer to the [Search for Person](#) Job Aid for more details
5. Enter the desired person's first and last name into **First Name Search** and **Last Name Search** respectively
 - Press [Enter] or [Tab] on your keyboard to activate the Search button
 - Search values will change to all caps
6. Click **Search**

RESULTS: If the person does not exist in the system, the below message window displays. You should also search for the person in the Personnel Roster to ensure they have never been employed with the State before continuing with the ADD process. See [State Employee Roster Query](#) for instructions on how to search for people in the Personnel Roster. The [Enterprise Personnel Report](#) allows searching for people who are in PeopleSoft but not within your agencies security and are either active or inactive. This helps to avoid duplicating person records for people who already have an Empl ID in the system. If accurate results display, skip the [Add a Person](#) process and go directly to the ["Steal" an Existing Inactive CWR Record](#) process.

Search Criteria did not return any results (18160,43)

Enter new or additional Search Criteria



If a person exists in PeopleSoft as only a Contingent Worker (CWR) and/or Person of Interest (POI) they may not have all the information needed to search for them to avoid duplication. Please use all available search options to ensure the person is not already in the system before adding them. If you realize you've duplicated a person submit a JIRA ticket as soon as possible.

Add a Person

Enter Personal & Biographical Data

(New person in the system only)

If the person does not exist in PeopleSoft, add the person.

For an existing inactive CWR in your security, skip to [Enter Job Data](#).

For an existing inactive CWR outside of your security, skip to [“Steal” an Existing Inactive CWR Record](#).

Navigation:

Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person

Click Add Person



Do not change or add to the value of NEW in the Person ID field.
PeopleSoft generates the Person ID.

Biographical Details tab

Name

1. ***Effective Date:** The date that the add is effective, or today's date – whichever is earlier. The person data must have an effective date on or before the add effective date for job data to be created.
2. Click **Add Name** to enter the employee's name

3. **Name Prefix:** Preferred prefix of the employee (optional)
 - Dr
 - Hon.
 - Miss
 - Mr
 - Mrs
 - Ms
4. ***First Name:** The employee's legal first name as it appears on their Social Security Card
5. **Middle Name:** The employee's middle name or middle initial as it appears on their Social Security Card
6. ***Last Name:** The employee's legal last name as it appears on their Social Security Card
7. **Name Suffix:** The employee's suffix, if applicable
 - II
 - III
 - IV
 - Jr.
 - Sr.
 - V
8. Click Refresh Name. Information in the Display Name, Formal Name, and Name populates.

9. Click OK

Biographic Information


The screenshot shows a 'Biographic Information' form. At the top, there's a section for birth details. Below that is a 'Biographical History' section. Numbered callouts point to the following fields:

- 1: Date of Birth (06/19/1999)
- 2: Protect Person Data checkbox (unchecked)
- 3: Effective Date (12/18/2023)
- 4: Gender (Male)
- 5: Highest Education Level (Bachelors Level Degree)
- 6: Marital Status (Single)
- 7: As of date field
- 8: Language Code dropdown

Other visible fields include Birth Country (USA), Birth State (not used), Birth Location (not used), Years (23), Months (5), United States (Default), Alternate ID (not used), and Full-Time Student (not used).

1. ***Date of Birth:** This data is required for benefits and WRS purposes
2. **Protect Person Data:** This box should be UNCHECKED for most employees. Used as an indicator for employees who have personal situations that make it necessary for their data to be excluded from external systems (only check if the employee needs to have their data protected).
3. ***Effective date:** This date should be the same as the other person effective dates.
4. ***Gender:** This data is required for EEO reporting and WRS purposes
5. **Highest Education Level** (optional)
6. ***Marital Status:** If an employee plans to enroll in insurance, this field is required. If unknown at time of entry, update as soon as information is known.
7. ***As of date:** date the marital status became effective
 - This is not required if Marital Status = Single
 - This date is required if Marital Status is anything except Single
 - If married, the date must match the date list for the spouse on the Update Dependent/Beneficiary page.
8. **Language Code:** Preferred language (optional)

National ID

National ID				
*Country 1	*National ID Type 2	National ID 3	Primary ID 4	
USA	Social Security Number	123-45-6789		+ -

1. ***Country:** USA (Default)
2. ***National ID Type:** Social Security Number (Default)
3. ***National ID:** Enter the person's Social Security Number
4. ***Primary ID:** Keep selected

Contact Information tab

Biographical Details	Contact Information	Regional	Organizational Relationships	Wisconsin Opt-In/Opt-Out
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Current Addresses

Current Addresses					
Address Type	As Of Date	Status	Address		
Home	12/18/2023	A		1	Add Address Detail

1. Click **Add Address Detail** to add the employee's home address

Address History	
Address Type Home	
Address History	
*Effective Date	12/18/2023
Country	USA
*Status	A
2 Add Address	

2. Click **Add Address**

3

Country United States

Address 1 123 Main St

Address 2

Address 3

City Madison State WI

Postal

County

OK Cancel

Clear

☐ Override Address Verification

**Address Warning:
Multiple Matches**

Suggestions:
 123 E Main St
 123 W Main St
 ARGUS FOOD & SPIRIT 123 E Main St
 ROGER PUTNAM 123
 EMPIRE REALTY 123 W Main St

edit with this suggestion

Country United States

Address 1 123 E Main St

Address 2

Address 3

City Madison State WI

Auto-populated after adding the "E" in Address 1 above

Postal 53703-3360

County Dane

OK Cancel

Clear

☐ Override Address Verification

**Address Warning:
Suite/Apt Missing**

Suggestions:
 123 E Main St
 Fl 1
 Ste 12
 Ste [200-202]
 Ste 300
 ARGUS FOOD & SPIRIT Ste 12
 ROGER PUTNAM Ste 202

edit with this suggestion

3. Enter applicable address information



PeopleSoft populates the Postal and County and may correct address errors. If the address is auto-populating incorrectly, you can override the address validation by checking the Override Address Verification checkbox at the bottom.

Country United States

Address 1 123 E Main St Ste 12

Address 2

Address 3

City Madison State WI

Postal 53703-3362

County Dane

4 OK Cancel

Clear

☐ Override Address Verification

No more suggestions

4. Once the Address Warnings disappear click **OK**

Address History

*Effective Date 12/18/2023

Country USA

*Status A

Add Address

Address 123 E Main St Ste 12
Madison, WI 53703-3362
Dane

5 OK Cancel Refresh

5. Click **OK**

Phone Information

The screenshot shows the 'Phone Information' form. It has a table with columns: *Phone Type, Telephone, Extension, Preferred, and two empty columns for actions. A dropdown menu for *Phone Type is open, showing options like 'Employee's Fax Phone', 'Employee's Home Phone', 'Employee's Other Phone', 'Employee's Personal Mobile Ph', 'Employee's Work Mobile Phone', 'Employee's Work Phone', 'Main', and 'Pager 1'. Callout 6 points to the dropdown, 7 points to the Telephone field, and 8 points to the '+' button in the action column.

6. Select a value from the ***Phone Type** list
 - Employee's Work Phone can only be entered/modified by Agency HR Specialist
7. Enter the **Telephone** number, **Extension** (if applicable), and select the **Preferred** checkbox where appropriate
8. Click "+" to add an additional Phone Type, if applicable

Email Addresses

The screenshot shows the 'Email Addresses' form. It has a table with columns: *Email Type, *Email Address, Preferred, and two empty columns for actions. A dropdown menu for *Email Type is open, showing options like 'Business', 'Home', and 'Other'. Callout 9 points to the dropdown, 10 points to the *Email Address field, and 11 points to the '+' button in the action column.

9. Select a value from the ***Email Type** list
 - Business Type can only be entered/modified by Agency HR Specialist. Remember to verify the business email address when transferring a person between agencies to ensure its accurate.
10. Enter the ***Email Address** and select the **Preferred** checkbox next to the Business Email Address
11. Click "+" to add an additional Email Type, if applicable

The screenshot shows the 'Instant Message IDs' form, which is crossed out with a large red X. It has a table with columns: *IM Protocol, *IM Domain, *Network ID, Preferred, and two empty columns for actions. The form is marked as 'NOT USED'.

Regional tab

Biographical Details | Contact Information | **Regional** | Organizational Relationships | Wisconsin Opt-In/Opt-Out >

John Doe III Person ID NEW

USA

Ethnic Group 1 of 1 View All

Regulatory Region USA United States Default

1 Ethnic Group

☐ Primary

History 1 of 1 View All

Effective Date 12/18/2023 Defaults from Biographical Details tab Date Entitled to Medicare

Citizenship (Proof 1) Citizenship (Proof 2)

☒ Eligible to Work in U.S.

Veteran 2 Military Status

Military Discharge Date Edit Discharge Date

Smoker History Not Used 1 of 1 View All

*Smoker *As of

1

1. Enter or select ***Ethnic Group**
 - The employee may identify as more than one ethnic group. Select plus sign (+) to add additional Ethnic Groups.
 - Select the ***Primary** checkbox for the ethnic group that is considered primary
2. Select an appropriate value from the **Military Status** list. Use the Edit Discharge Date link, if applicable
 - Not a Veteran
 - Not indicated
 - Veteran

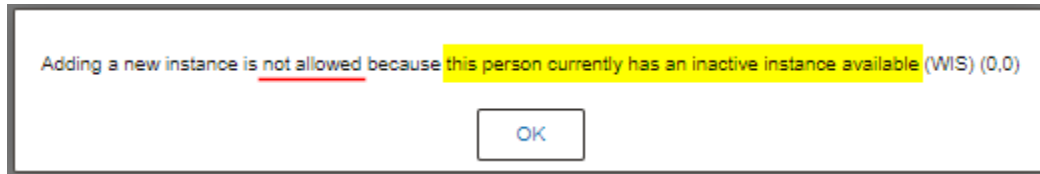
Organizational Relationships tab

1. Select the **Contingent Worker** checkbox
2. **Select Checklist Code:** Add Contingent Worker Instance
3. Click **Add Relationship**

RESULTS: At this point, Personal Data is complete. You will automatically be redirected to the Job Data page at the Work Location tab to continue the new hire process. Proceed to [Enter Job Data](#) process below. If you do not complete Job Data at this time you will need to [Add a New CWR Instance](#) later to complete the new hire process. Make note of the newly assigned Empl ID.

“Steal” an Existing Inactive CWR Record

If there is an inactive CWR record in the system for your person and you try to add a new CWR instance you will get the following error message:



Because the “steal” function requires a position number the system won’t let you steal a CWR record (unless you have a position number for your new CWR). When an inactive CWR is starting a new CWR job at a different agency or outside of your security at your agency, please submit a JIRA ticket requesting Central HR to add the “Steal” row for you. Please provide the following information:

- Effective date
- Business Unit
- Department ID
- Location
- Reports To
- Comp Rate, if applicable

Add a New CWR Instance

When to add a new CWR instance:

- When there is no inactive CWR instance available
- Hiring into a CWR when the person is already in PeopleSoft as an EMP and/or POI only
- If you don’t flow directly to job data when entering a new [person](#) into the system

Create a new CWR instance for the new job. This instance is automatically assigned a new Empl Record number which is used to track transactions and records associated to the job.

Navigation: Main Menu>Workforce Administration >Job Information>Add Contingent Worker Instance

1. Enter or select the desired **Empl ID**
2. Once you tab out of the Empl ID field, the Empl Record field will automatically fill based on the highest existing **Empl Record** in the system. Do not manually override.
3. Click **Add Relationship**

Despite your best efforts to locate the employee in the system prior to creating the new instance you may receive the following pop-up message:



This means the employee has an inactive Empl Record that you must “steal”.

John Doe III
Contingent Worker

Empl ID 100149237
Empl Record 0

Work Location Details ⓘ

4 *Effective Date 12/18/2023

Effective Sequence 0

HR Status Active

Job Status Active

Default *Action Add Contingent Worker

5 Reason Contingent Worker

6 *Job Indicator Primary Job

4. Enter or select the desired ***Effective Date** for the start of the job
5. **Reason:** Select *Contingent Worker*
6. Select the most appropriate ***Job Indicator**

Continue to Enter Job Data.

Enter Job Data

Navigation for Rehire: Main Menu > Workforce Administration > Job Information > Job Data



**DO NOT CLICK SAVE UNTIL ALL FIELDS IN ALL TABS AND LINKS
HAVE BEEN COMPLETED AS DIRECTED IN THIS SECTION**

Work Location tab

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
----------------------	-----------------	-----------	---------	-------------	--------------

1

Position Number

Q

Override Position Data

Position Entry Date

☐ Override Position Entry Date

☐ Position Management Record

2

*Regulatory Region

USA

United States

Default

3

Company

WIS

State of Wisconsin

4

*Business Unit

50500

Q

Administration

Default

5

*Department

5050000000

Q

Dept of Administration

Department Entry Date

12/18/2023

6

*Location

MADEWI0017

Q

505 ADMINISTRATION BLDG

1. Enter the **Position Number** for this CWR, if you have one.

All other information on this page will fill in automatically if you are using a Position Number.

Skip to the Job Information tab section.

2. ***Regulatory Region:** USA (Default value)
3. **Company:** Select your agency's company (LEG, WCC, WCS or WIS)
4. ***Business Unit:** This defaults to 50500 (Administration). Change this field to match your Business Unit, if different.
 - a. If 50500 is correct, please change it to 14400 first and then back to 50500 (this will trigger the automatic Job Code to fill in)
5. ***Department:** Enter the Department ID for this CWR
6. ***Location:** The location generally defaults from the Department ID automatically. If it is not correct, select the correct location for this CWR.

Job Information tab

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
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7

*Job Code

99400

Default

Entry Date

12/18/2023

Supervisor Level

Supervisor ID

8

Reports To

*Regular/Temporary

Regular

Default

Empl Class

Contractor

Default

*Regular Shift

Not Applicable

Default

*Classified Ind

Contractor

Default

Contractor

*Job Code will default to 99500 with a Dept ID = 4103020000

*Full/Part

Full-Time

Default

*Officer Code

Not Applicable

Default

Shift Rate

Shift Factor

Standard Hours ?

Standard Hours

40.00

Work Period

W

Weekly

FTE

0.000000

Default

☐ Adds to FTE Actual Count?

☐ Encumbrance Override

Contract Number ?

Contract Number

Next Contract Number

Contract Type

USA

*FLSA Status

Nonexempt

Default

Work Day Hours

*EEO Class

None of the Above

7. ***Job Code:** 99400
 - a. This is the only Job Code for a CWR for most agencies
 - b. DOC may also use 99500 for select contractors with Dept ID = 4103020000
 - c. If the field is blank, go back to the Work Location tab, change the Business Unit to something else and re-enter the correct Business Unit.
 - d. All other required values default, except Reports To
8. **Reports To:** Enter the Reports To for this CWR, if applicable

Payroll tab

*Payroll System

Other Payroll System ?

Pay Group
 Dept of Administration

Pay Type
 Hourly

Tax Location Code
 Wisconsin

GL Pay Type
 FICA Status

Combination Code
 Leave all Default values as is

All values are Default
 Defaults from Business Unit on Work Location tab
 Defaults from Company on Work Location tab

Everything on this tab will default appropriately. You do not need to change anything.

Compensation tab

NOTE: Most CWR records do not have compensation.
This section only applies if your CWR has compensation.

Compensation Rate

*Frequency Hourly

> Comparative Information ?

> Pay Rates ?

Default Pay Components

Pay Components ?

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate C
NAHRLY		90.000000	USD	H			

Calculate Compensation

9. ***Frequency:** select *H (Hourly)*
10. ***Rate Code:** select *NAHRLY*
11. **Comp Rate:** enter your CWR comp rate
12. Click the **Calculate Compensation** button and the entered **Comp Rate** will automatically display behind the **Compensation Rate** above.

Employment Data link

Job Data	Employment Data	Earnings Distribution	Benefits Program Participation
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All the dates will default and auto-populate to the effective date of the first Add Contingent Worker row. These dates are moot for CWR and should never be overridden.

Organizational Instance ⓘ

Organizational Instance Rcd 0

Original Start Date
 ☐ Override

Last Start Date

First Start Date

Years Months Days
 0 0 0

Termination Date
 ☐ Override

Org Instance Service Date

Provider ID

Organizational Assignment Data ⓘ

Instance Record

Last Assignment Start Date 01/08/2024
 First Assignment Start 01/08/2024

Assignment End Date

Home/Host Classification Home
 Years Months Days
 0 0 0

Company Seniority Date
 ☐ Override

Benefits Service Date
 ☐ Override

Seniority Pay Calc Date
 ☐ Override

Probation Date

Professional Experience Date

Business Title

Last Verification Date

Position Phone

13. If entering **Time Reporter Data** via Employment Data page on behalf of the Time and Labor Specialist, refer to the next section.

Enter Time and Labor Data

NOTE: Most CWR records do not have Time Reporter Data.
This section only applies if your CWR has Time Reporter Data.

Time and Labor Data can be entered by the Time and Labor Specialist role after the contractor's Personal and Job Data have been established. Or the Time and Labor Data can be entered by the HR Specialist Role during Job Data entry via the Employment Data page. If entered by the HR Specialist, be sure to obtain the proper values from the Time and Labor Specialist. The contractor will not be able to enter time until Time & Labor data is entered. The [Setting Up Employee Time Reporting Job Aid](#) is found [here](#).

Benefits Program Participation link

Job Data	Employment Data	Earnings Distribution	Benefits Program Participation
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Benefit Status ⓘ

18

Benefit Record Number 0

Effective Date 12/18/2023
 Effective Sequence 0
 HR Status Active
 Job Status Active

Default

*Benefits System Not Managed in PeopleSoft

Annual Benefits Base Rate US

Benefits Administration Eligibility ⓘ

BAS Group ID

19

Elig Fld 1 NOTELIG

14. **Benefit Record Number:** This will default to zero if no other instances exist in the system. This number should **NEVER** match a benefit record number from an employee instance.

15. **Elig Fld 1:** Select *NOTELIG*

Once you have rechecked all the tabs and links to ensure everything is correct, click **Save**.

Save

Return to Search

Notify

Refresh

The system doesn't like Elig Fld 1 filled in when the Benefit System is *Not Manages in PeopleSoft* so you will get the following warning when you click save:

Warning – The Benefits Administration Eligibility criteria are not relevant for this Benefits System 2024-01-08. (4000,127)
 Data entry has been made into the Benefits Administration product-specific Eligibility fields for the Job, even though the Benefit System is not set to "Benefits Administration". These fields are reserved for use by the Benefits Administration product, and, in fact, could be altered by the system without notice by future product features. Their use outside of Benefits Administration is not formally supported and is at the client's own risk.

OK

Cancel

Click **OK**.

! What if I save the Job Data but need to make corrections or add more information? !

If you clicked Save on the Job Data, but were not finished or need to make a correction, do NOT add additional rows to the job data in an attempt to 'correct' the information. Submit a STAR Support Ticket requesting the correction(s).