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

Revised 01/09/2024

Contents

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.

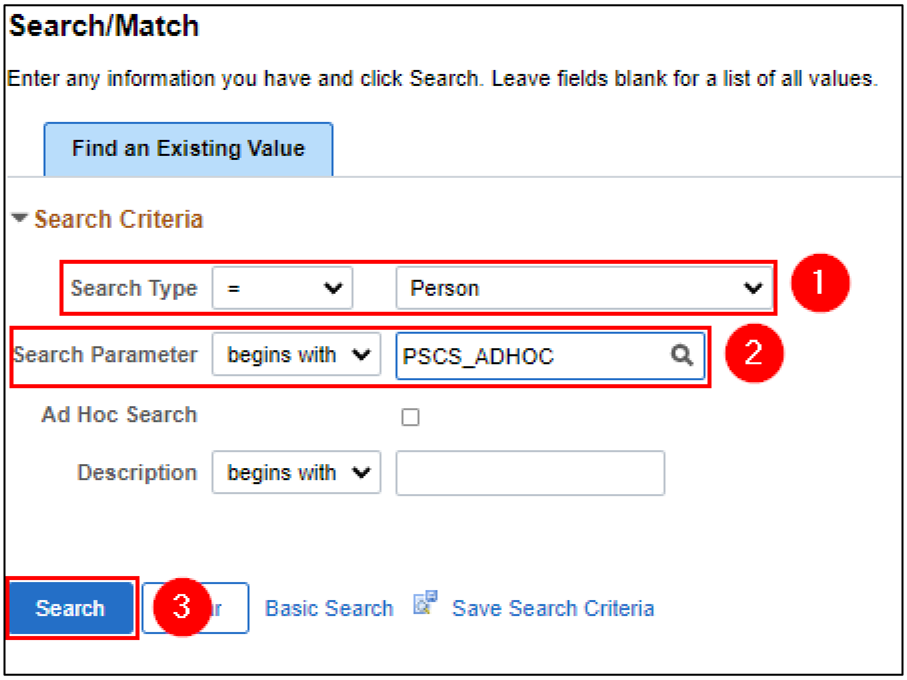
CWRs should not be added into positions that have not been evaluated by the Agency Position Management Specialist.

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.

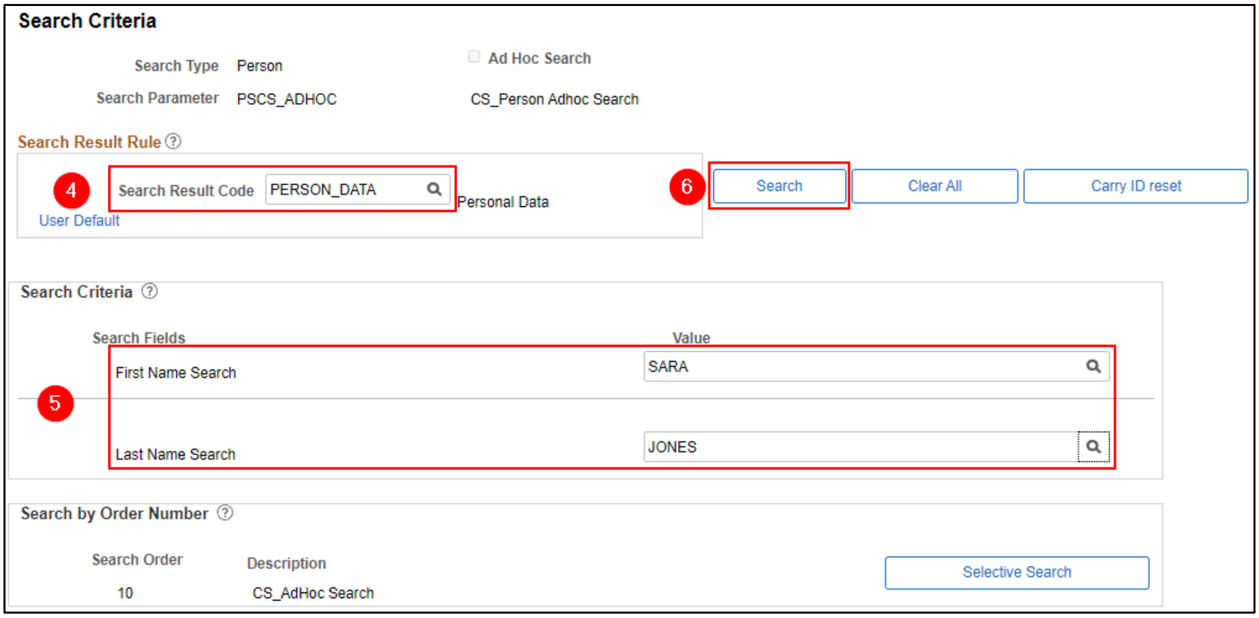
Search For an Existing Person

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

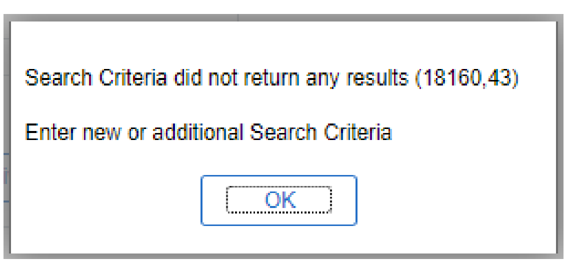


1. **Search Type** = Person
2. **Search Parameter** = PSCS_ADHOC
3. Click **Search**



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.



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

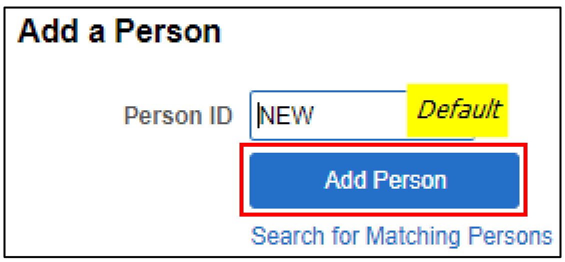
(New person in the system only)

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.

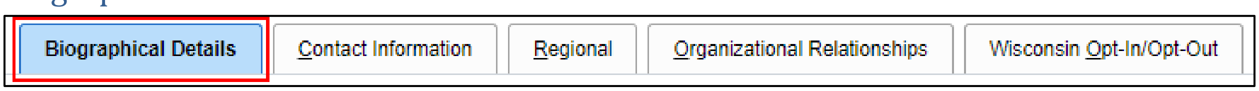
Navigation:
Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person



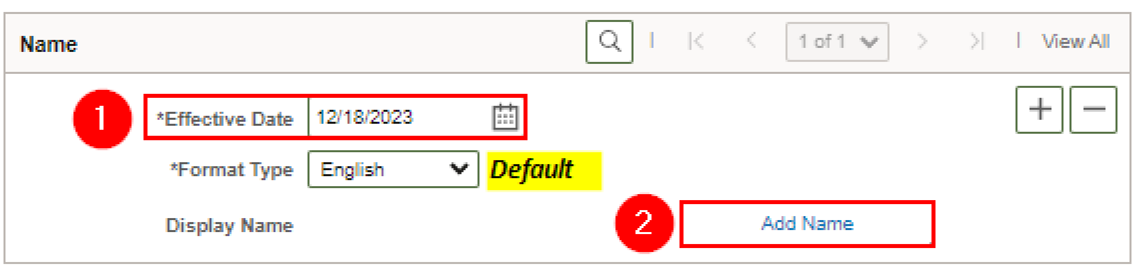
Click Add Person

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

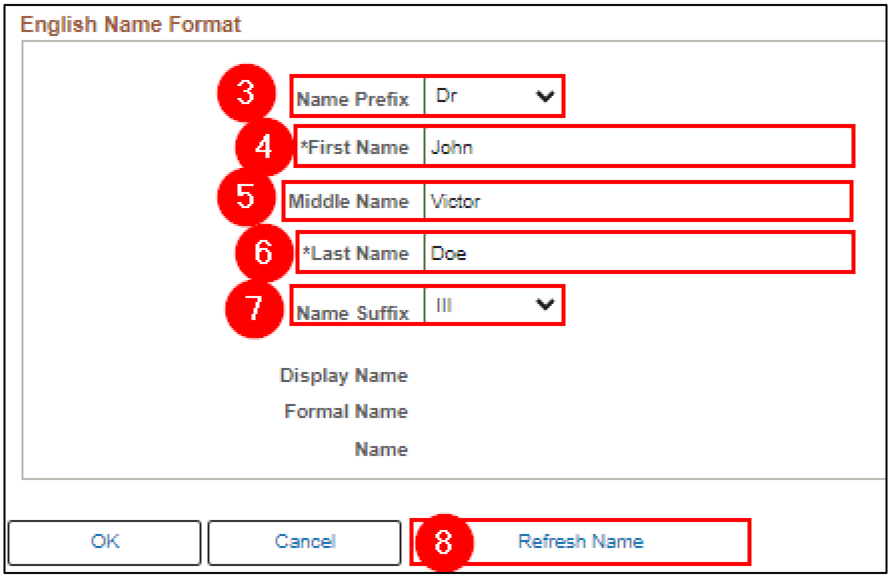
Biographical Details tab



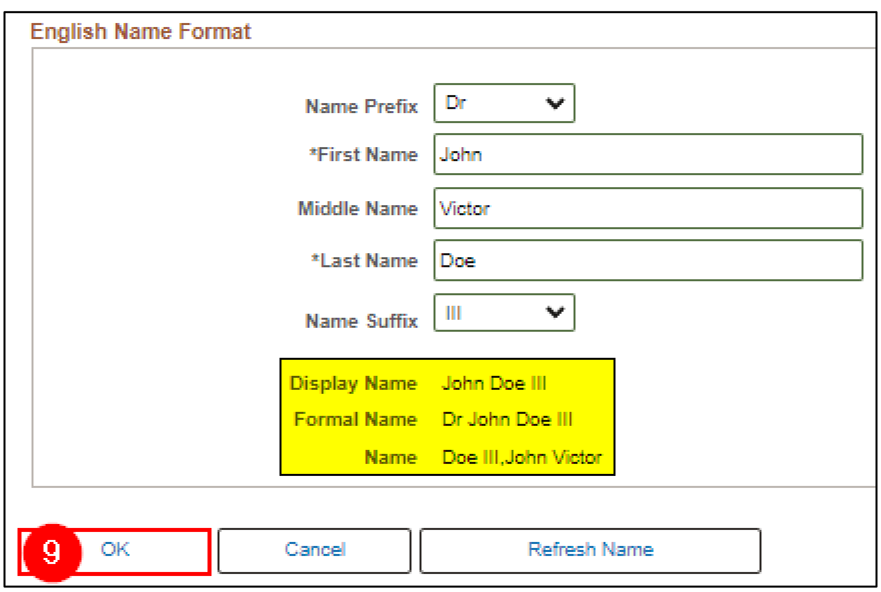
Name



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

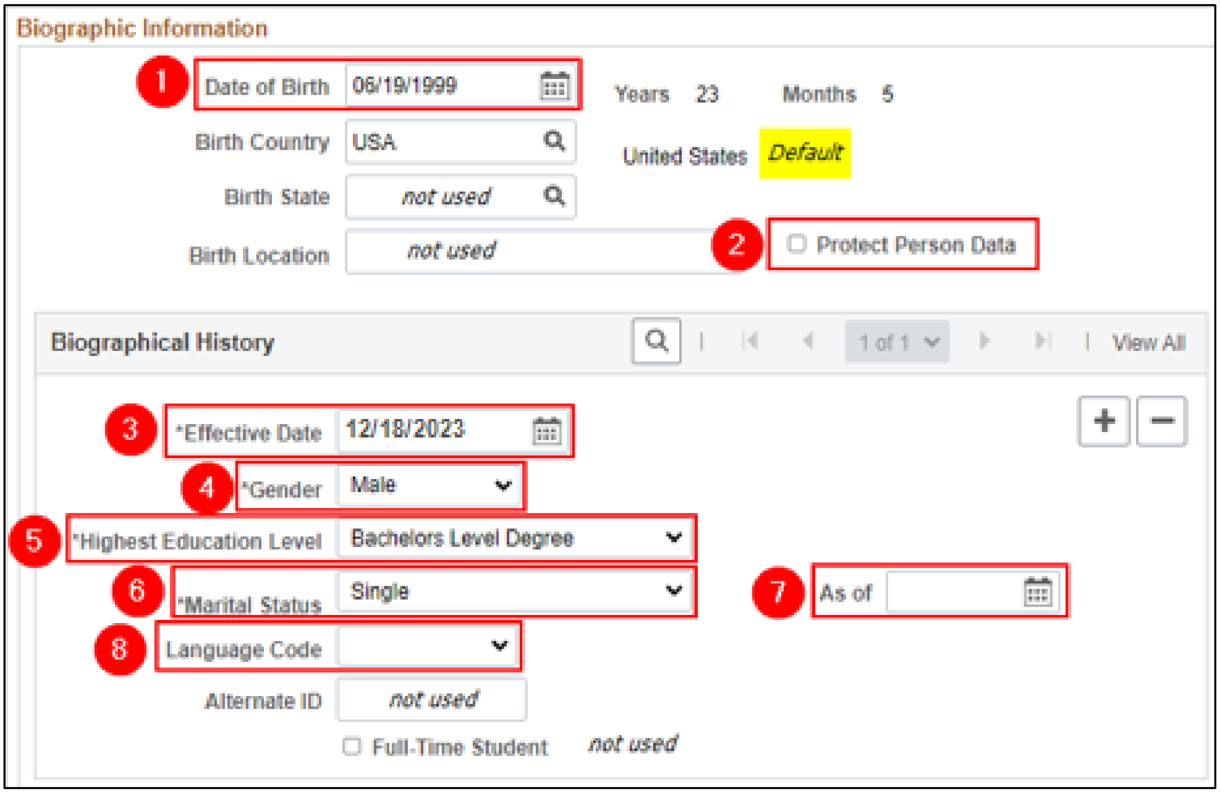


3. **Name Prefix:** Preferred prefix of the employee (optional)
    - Dr
    - Miss
    - Mrs
    - Hon.
    - Mr
    - Ms
4. ***First Name:** The employee's legal first name as it appears on their Social Security Card
5. **Middle Name:** The employee's middle name or middle initial as it appears on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



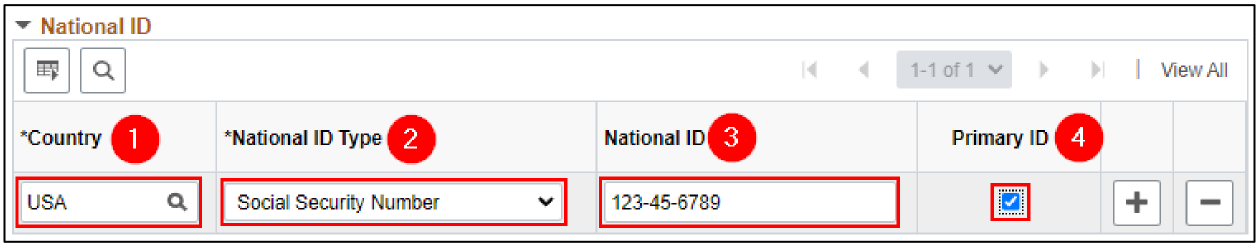
9. Click **OK**

Biographic Information



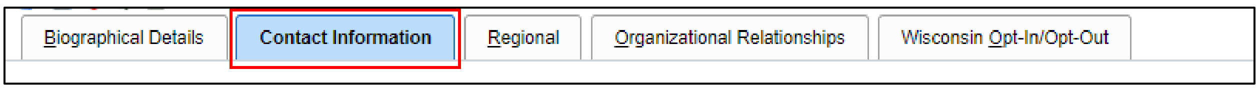
1. ***Date of Birth:** This data is required for benefits and WRS purposes
2. **Protect Person Data:** This box should be UNCHECKED for most employees. Used as an indicator for employees who have personal situations that make it necessary for their data to be excluded from external systems (only check 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

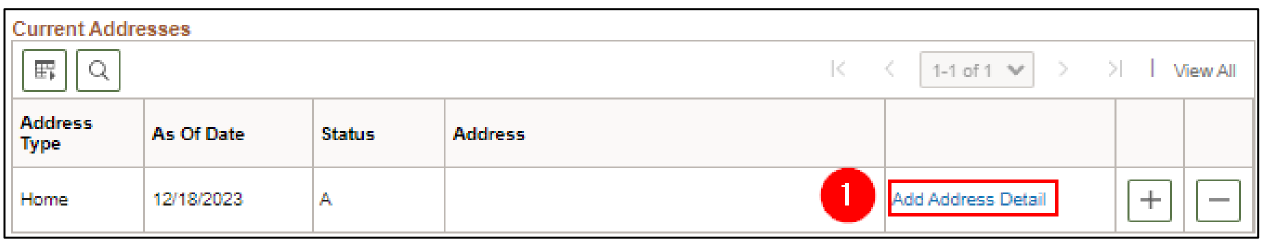


1. ***Country**: USA (Default)
2. ***National ID Type**: Social Security Number (Default)
3. ***National ID**: Enter the person's Social Security Number
4. ***Primary ID**: Keep selected

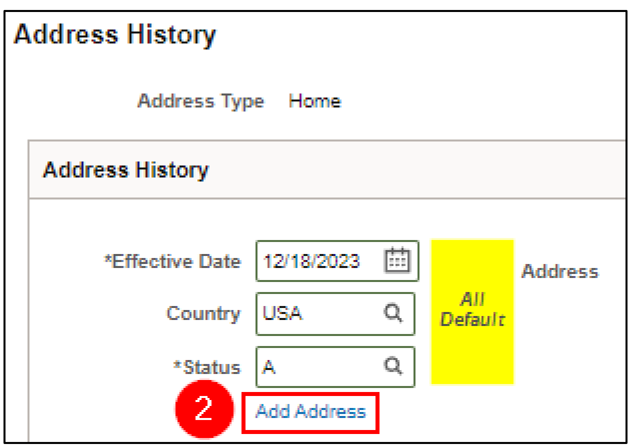
Contact Information tab



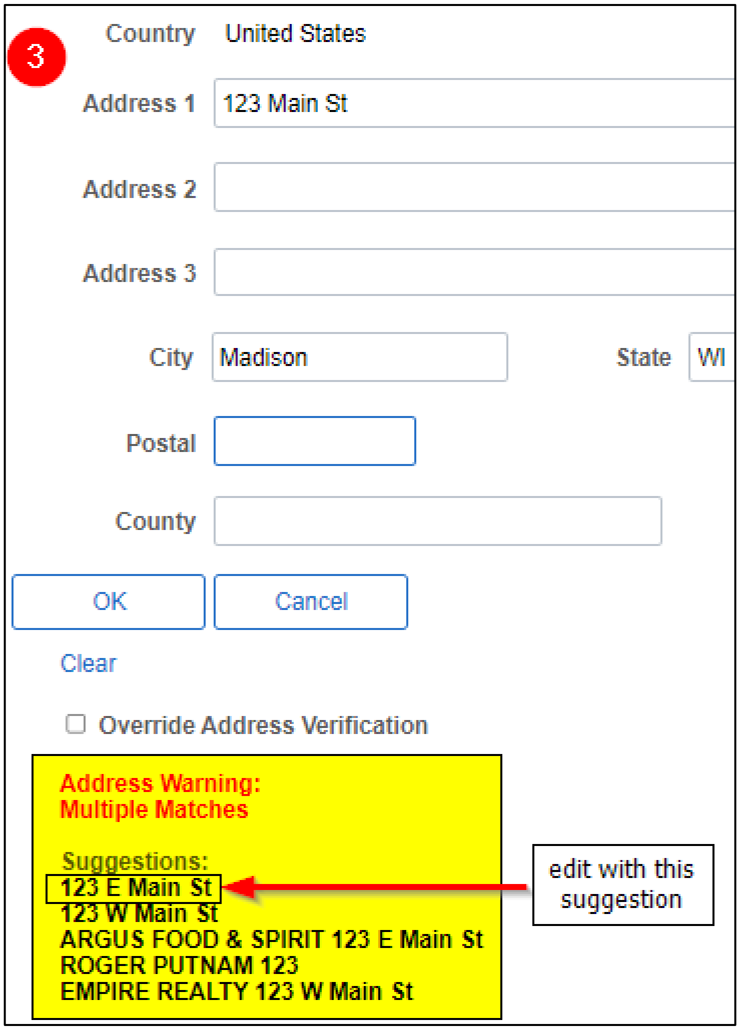
Current Addresses

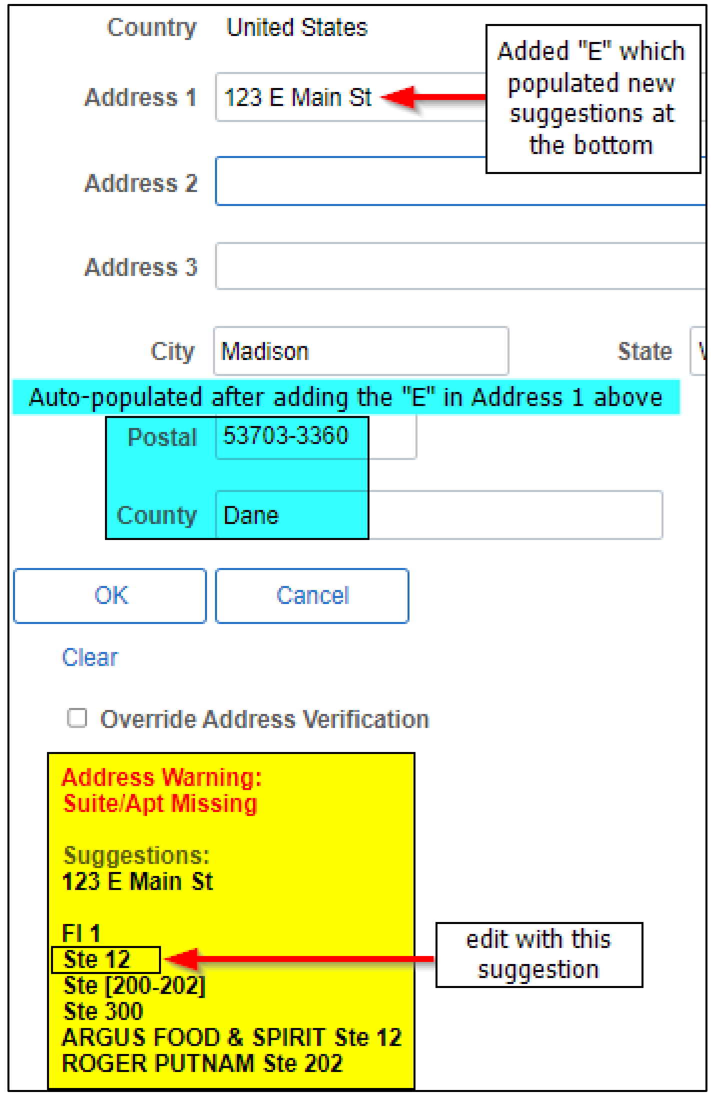


1. Click **Add Address Detail** to add the employee's home address



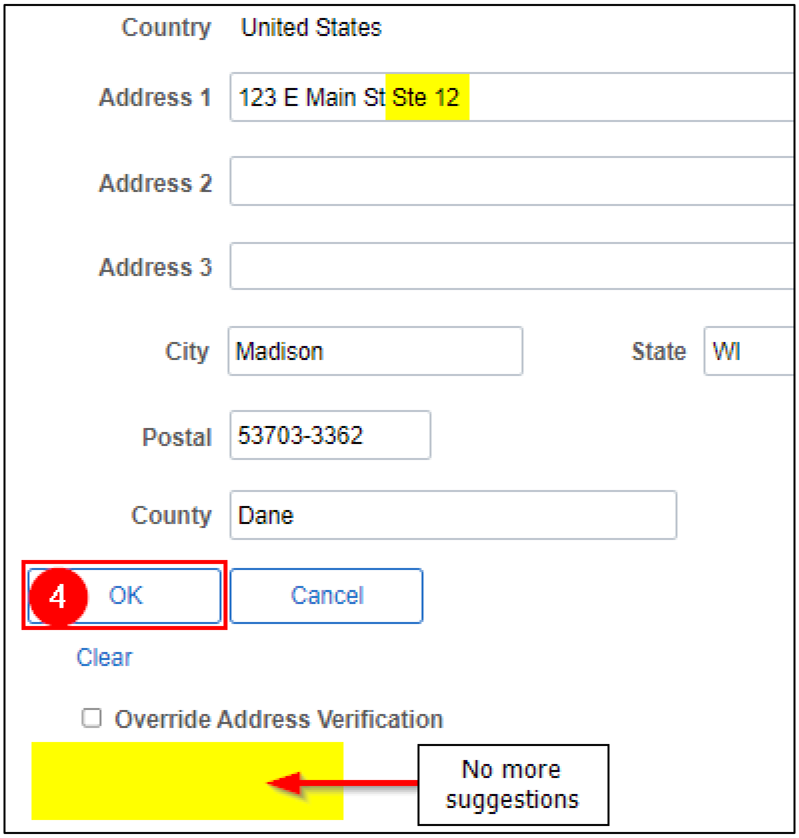
2. Click **Add Address**



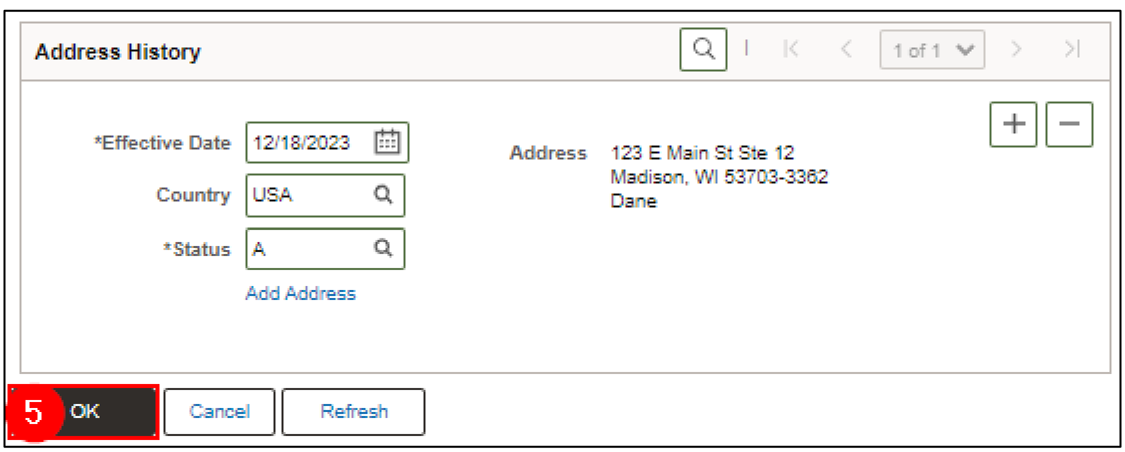


3. Enter applicable address information

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.

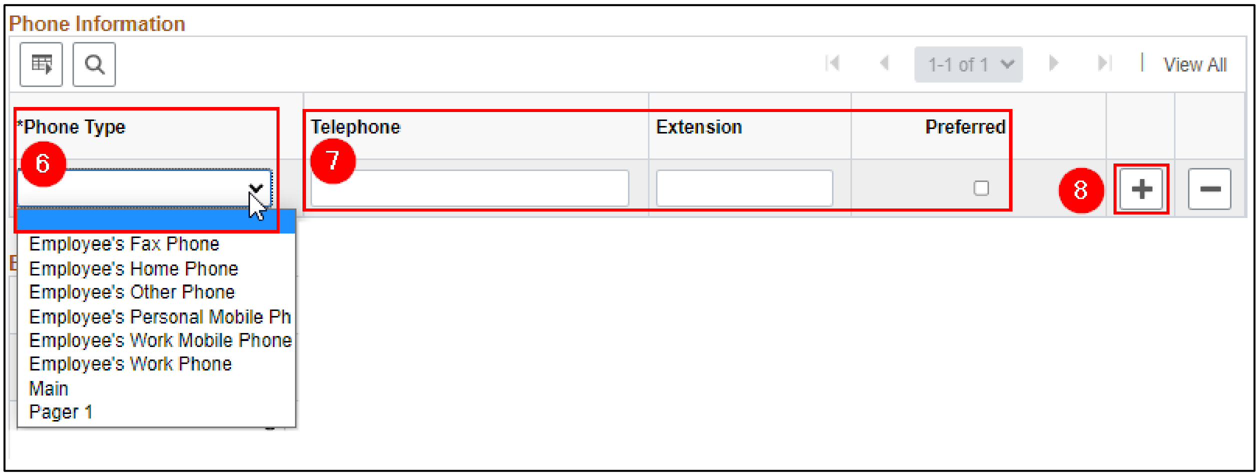


4. Once the Address Warnings disappear click **OK**



5. Click **OK**

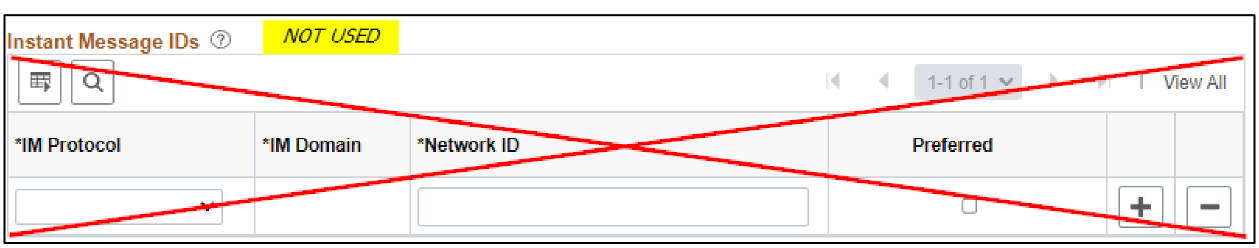
Phone Information



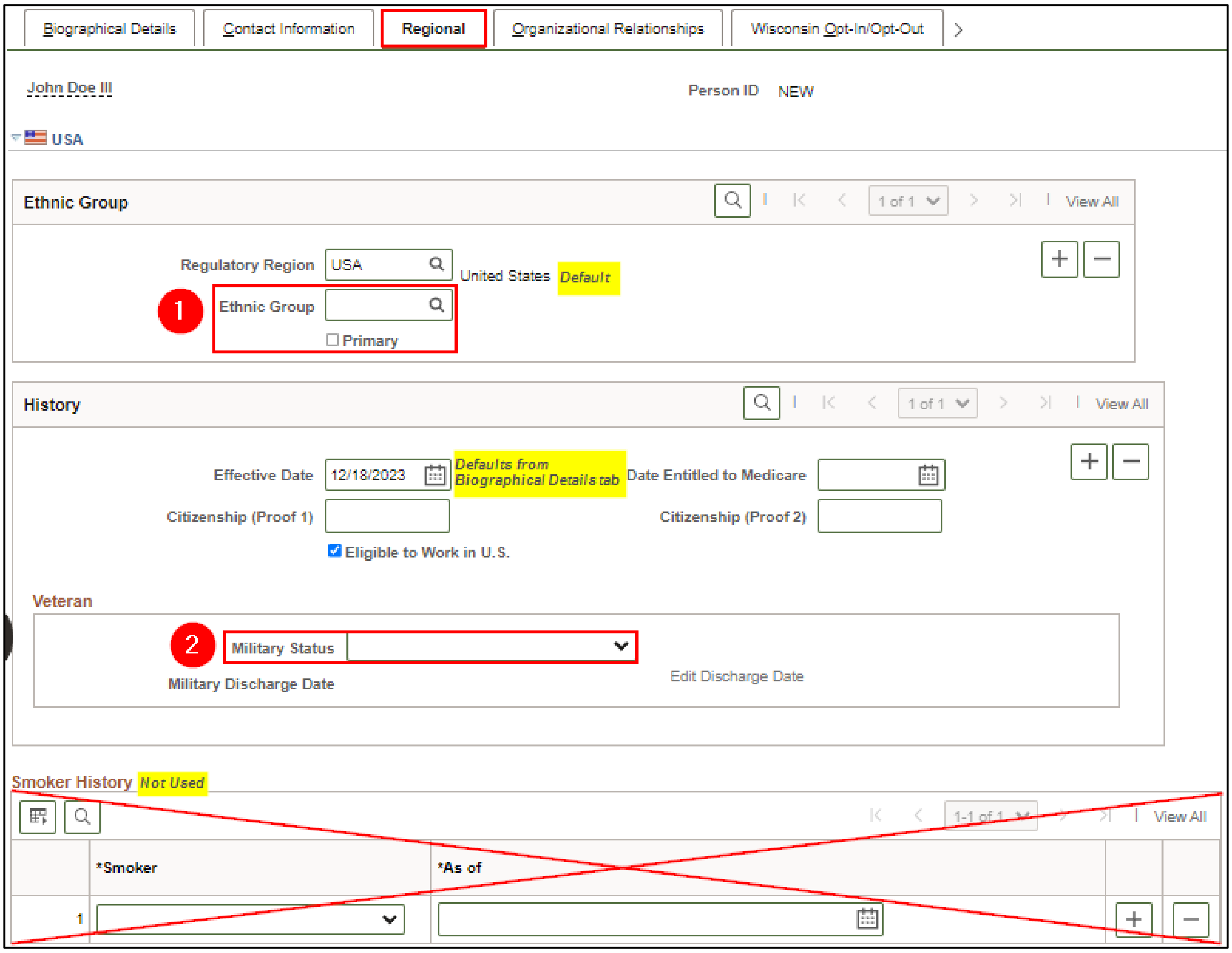
6. Select a value from the ***Phone Type** list
   - Employee's Work Phone can only be entered/modified by Agency HR Specialist
7. Enter the **Telephone** number, **Extension** (if applicable), and select the **Preferred** checkbox where appropriate
8. Click "+" to add an additional Phone Type, if applicable

Email Addresses

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

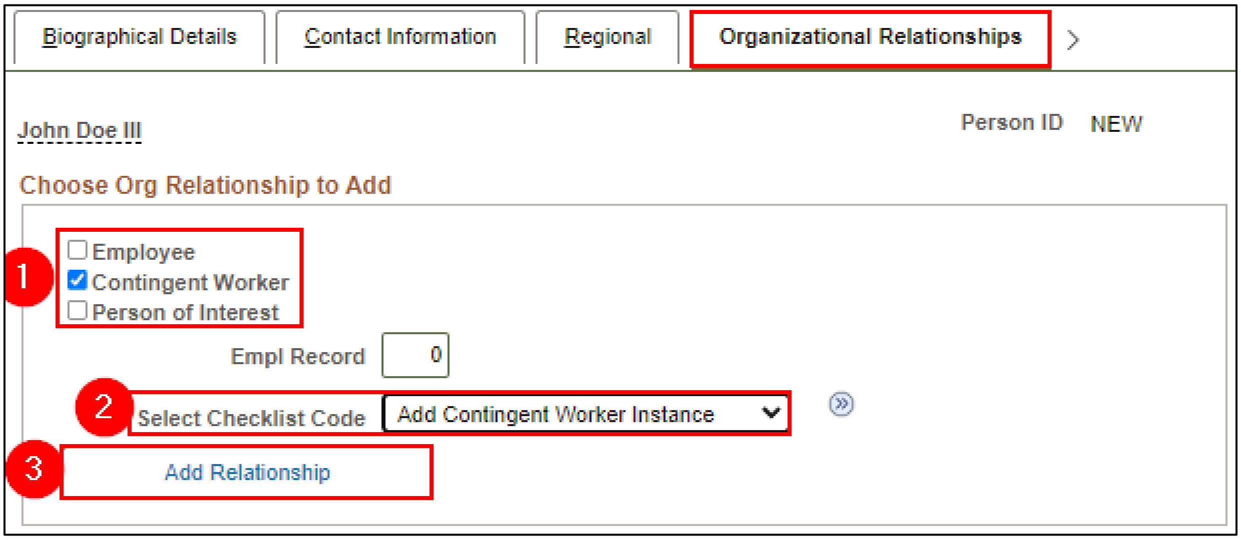


Regional tab



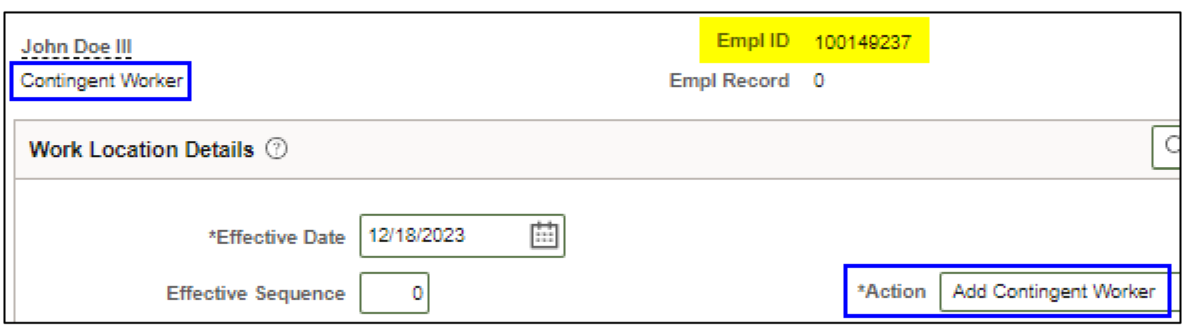
1. Enter or select *__Ethnic Group__
   - The employee may identify as more than one ethnic group. Select plus sign (+) to add additional Ethnic Groups.
   - Select the *__Primary__ checkbox for the ethnic group that is considered primary
2. Select an appropriate value from the **Military Status** list.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

Organizational Relationships tab



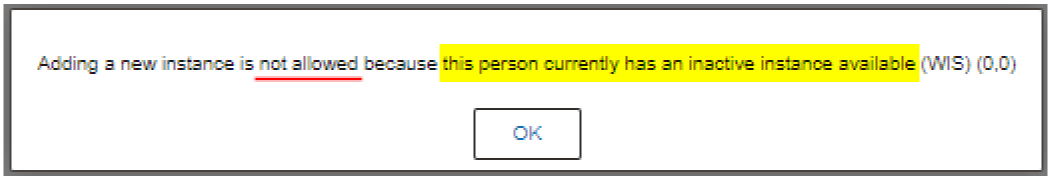
1. Select the **Contingent Worker** checkbox
2. **Select Checklist Code**: Add Contingent Worker Instance
3. Click **Add Relationship**

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

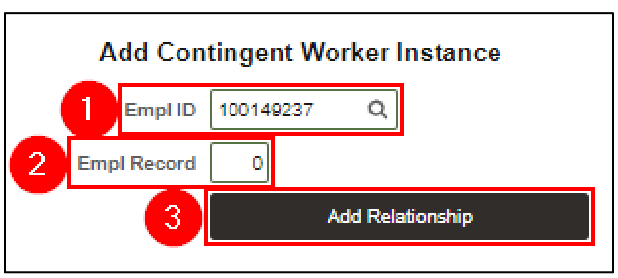
Add a New CWR Instance

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

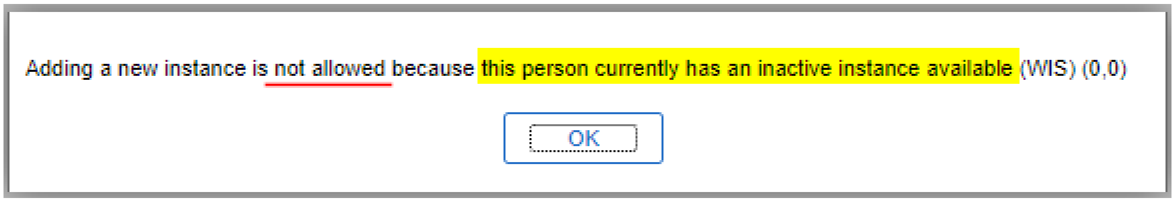
Create a new CWR instance for the new job. This instance is automatically assigned a new Empl Record number which is used to track transactions and records associated to the job.

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

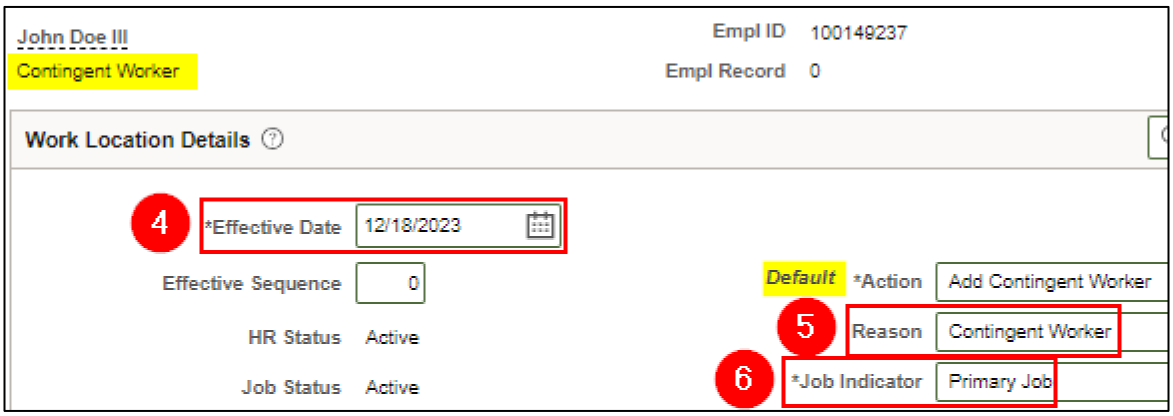


1. Enter or select the desired **Empl ID**
2. Once you tab out of the Empl ID field, the Empl Record field will automatically fill based on the highest existing **Empl Record** in the system. Do not manually override.
3. Click **Add Relationship**

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”.

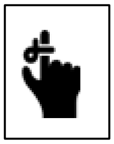


4. Enter or select the desired ***Effective Date** for the start of the job
5. **Reason:** Select *Contingent Worker*
6. Select the most appropriate ***Job Indicator**

Continue to Enter Job Data.

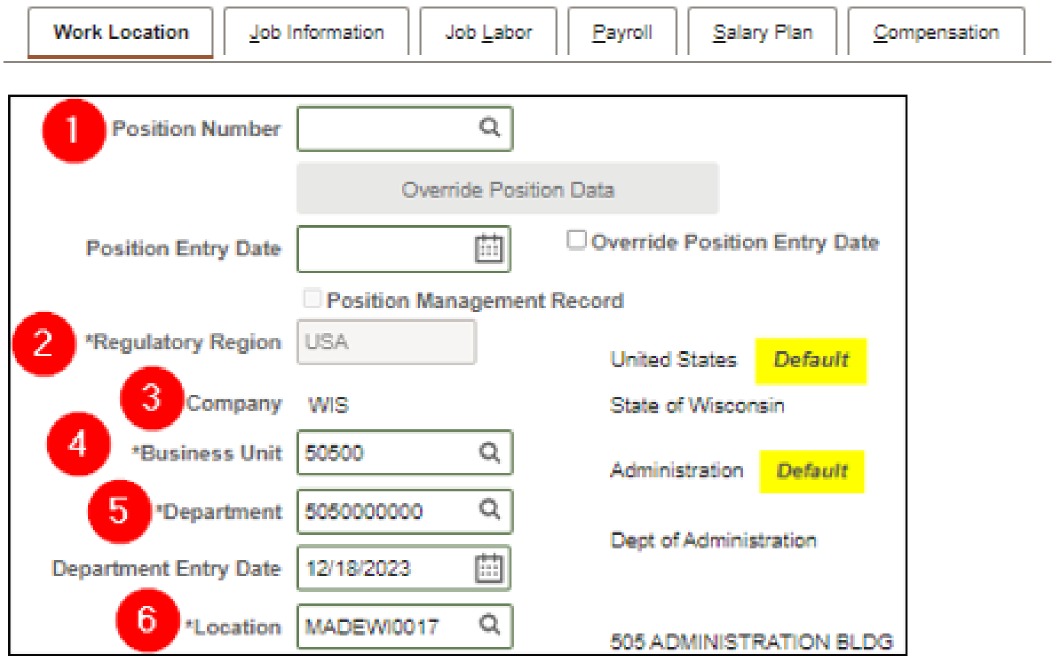
Enter Job Data

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



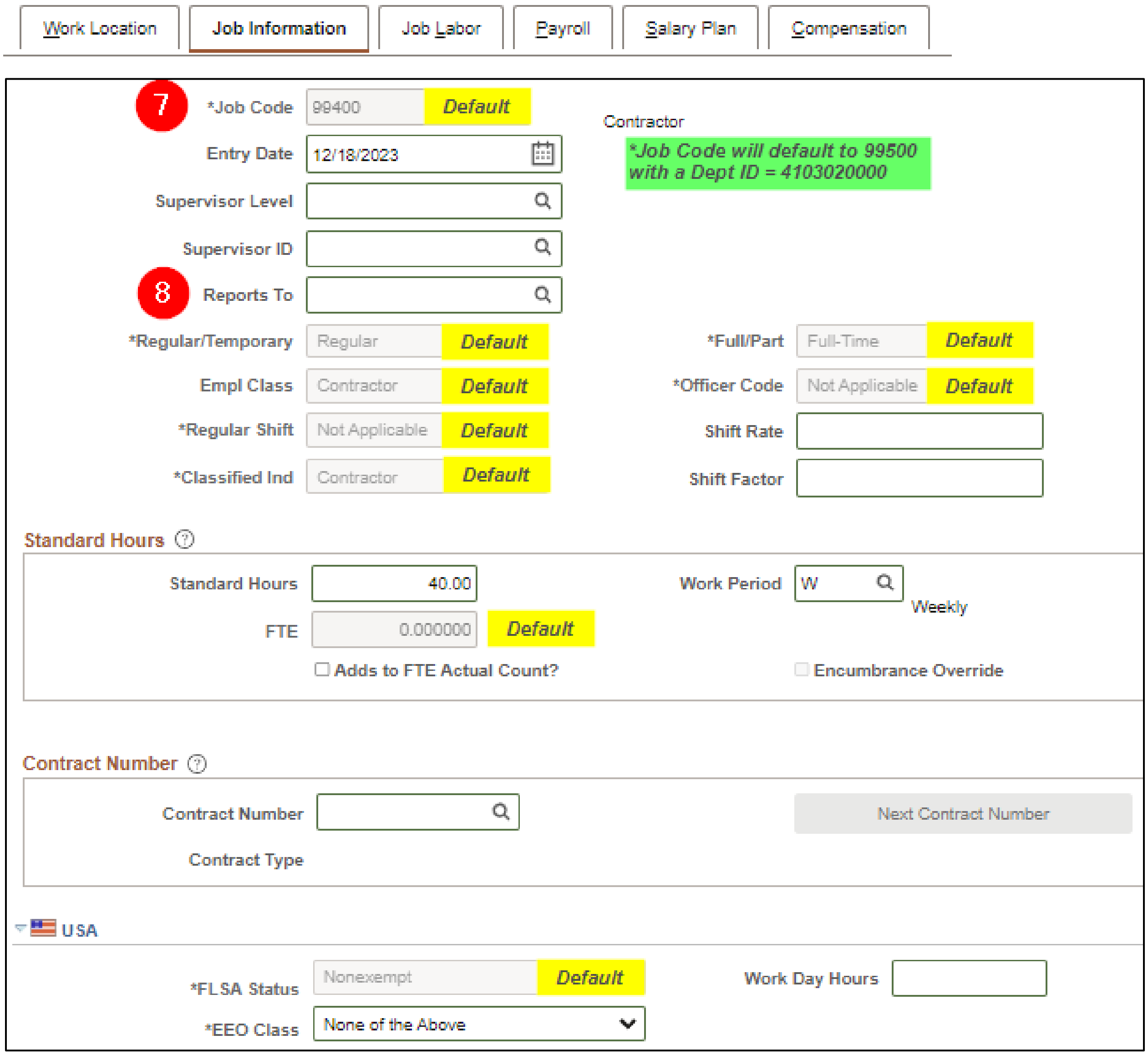
1. Enter the **Position Number** for this CWR, if you have one.

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

Skip to the Job Information tab section.

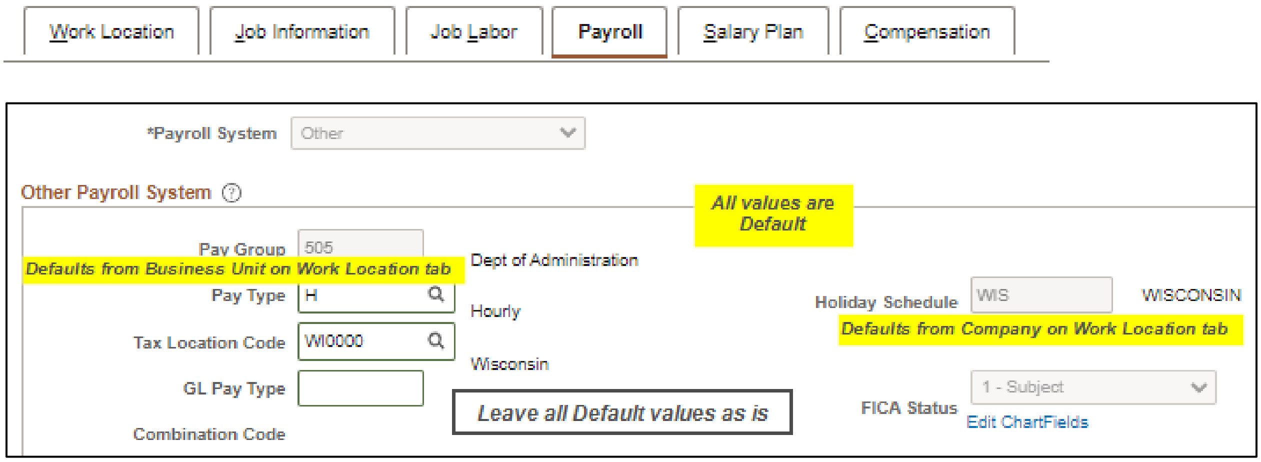
2. ***Regulatory Region:** USA (Default value)
3. **Company:** Select your agency's company (LEG, WCC, WCS or WIS)
4. ***Business Unit:** This defaults to 50500 (Administration). Change this field to match your Business Unit, if different.
    a. If 50500 is correct, please change it to 14400 first and 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



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

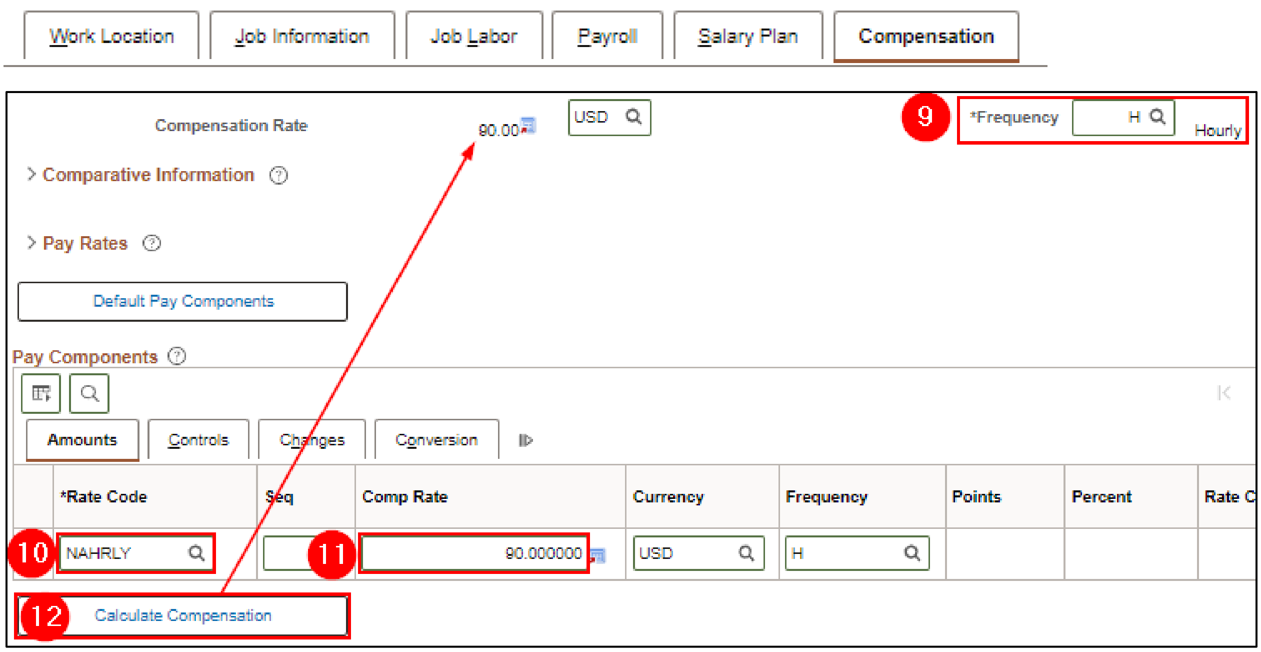
Payroll tab



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

Compensation tab

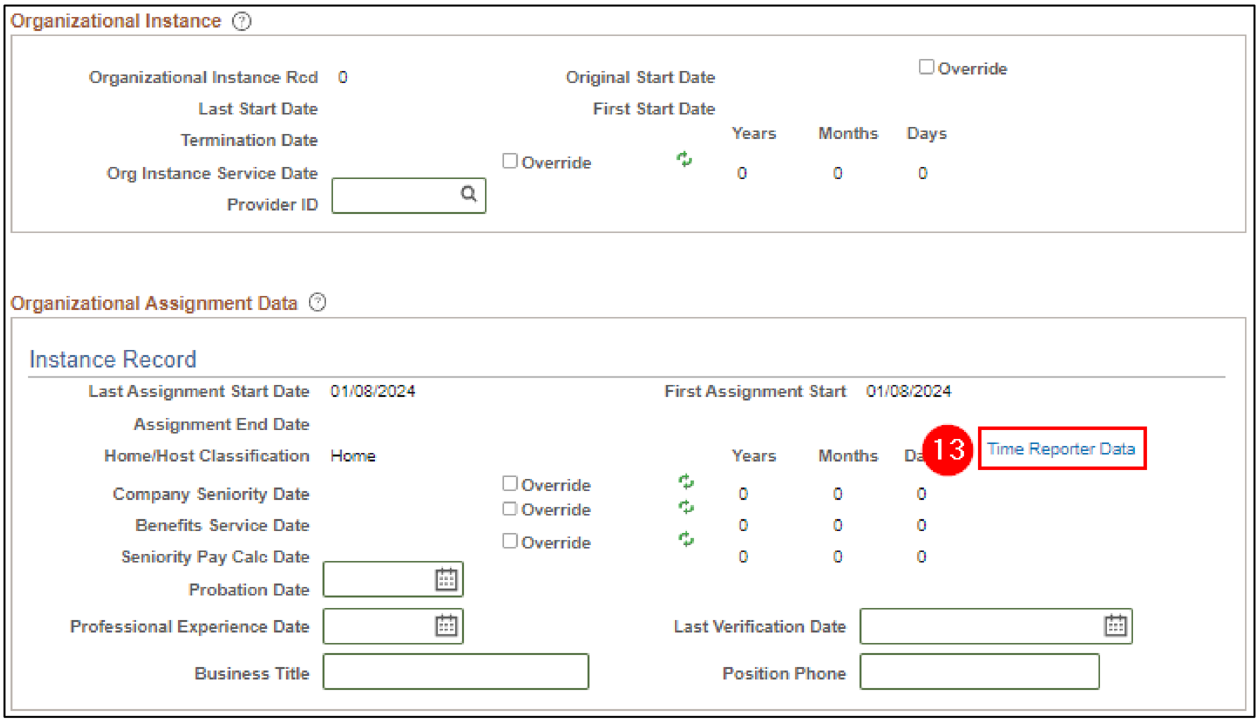
NOTE: Most CWR records do not have compensation.
This section only applies if your CWR has compensation.



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

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.



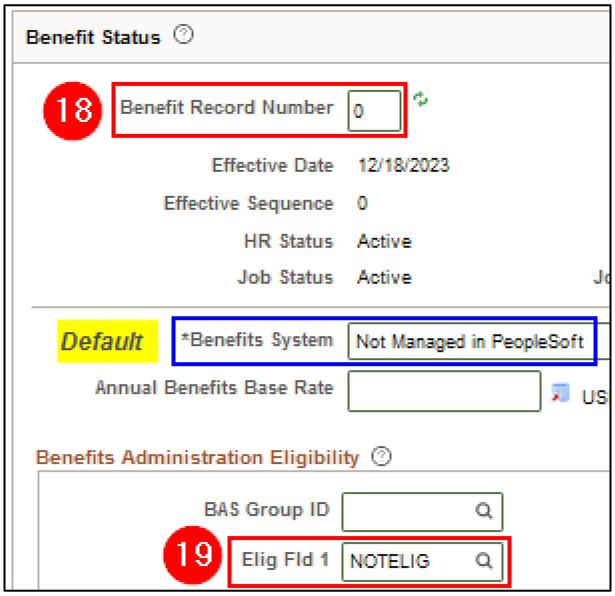
13. If entering **Time Reporter Data** via Employment Data page on behalf of the Time and Labor Specialist, refer to the next section.

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.

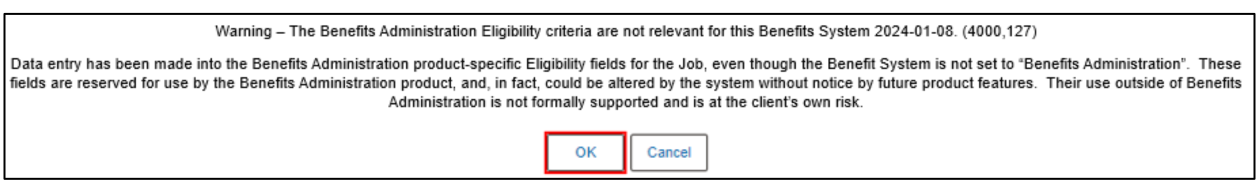
Benefits Program Participation link



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**.

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).