Overview

- This job aid is intended for a HCM Initiator.
- This job aid will cover the steps for a HCM Initiator to adding a new contingent worker within iO.

*Note: Use Add a Pending Worker (Worker Type: Contingent Worker)*

<< -- NOT “Add Contingent Worker”! -- >>

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1. **Navigate to New Person**

1. You can access the **New Person** task in two ways:

   a. (Option 1) Click the **Navigator** icon in the upper left-hand corner of the iO page.

   Under the **My Client Groups** section click the drop-down arrow and select **New Person** from the drop-down list.
b. (Option 2) Under the My Client Groups tab on the home page, you can scroll down and click on the New Person tile on the Main Page.

![Image of the Home Page with the My Client Groups tab highlighted]

2. Enter Identification Information

1. Upon entering the New Person page, click Add a Pending Worker. (NOT “Add a Contingent Worker”)

![Image of the New Person Page with the Add a Pending Worker button highlighted]

2. Under the Basic Details section enter the data for the following fields:

a. **Proposed Start Date**: Use the calendar icon to select an effective date for the new contingent worker.
b. **Action**: Add Pending Worker
c. **Action Reason**: Use the drop-down menu to make a selection.d. **Legal Employer**: William Marsh Rice University LE
e. **Worker Type**: Contingent Worker
3. Under the Personal Details section enter the required fields:

![Personal Details Section]

- **Enter Name**: Type the contingent worker’s last, first, and preferred first name.
- **Gender**: Use the drop-down menu to select the contingent worker’s Gender.
- **Date of Birth**: Enter the adjunct’s Date of Birth by using the calendar icon. This is helpful for avoiding creating duplicate identities in iO.

  *Note: The HCM Initiator may not know the Gender, DOB or other personal info. This information can be obtained later in the checklist assigned to the contingent worker.*

4. After entering all contingent worker identification information, click **Next** in the upper right-hand corner of the screen.
3. Enter Person Information

1. Now enter more personal information for the contingent worker:

   ![Addresses]

   a. **Country**: The country will default to the United States.
   b. **Address Line 1**: Enter the contingent worker’s address by typing.
   c. **Address Line 2**: Enter if needed.
   d. **ZIP Code**: Enter your contingent worker’s current ZIP Code. After entering the ZIP Code, then either the City, State, County will autofill, OR you will need to use the drop-down menus to manually enter the City, State, and County information.

2. Add Phone Details. Select the + icon. **Note: If the information is not known during the time of entry, the phone and email section can be skipped and obtained during onboarding.**

   ![Phone Details]

3. Select the **Type** of phone and **Country Code** by using the drop-down menus. Then manually type the **Area Code** and the phone **Number**.

   ![Phone Details]

4. Next add Email Details. To do this, select the + icon.
5. Under the Email Details section, select the Type of email by using the drop-down menu and then manually type the adjunct’s Email.

6. Skip the “Legislative Information” section.

   a. Also skip Citizenship and Visa information.

7. Click Next in the upper right-hand corner of the screen.

8. The Person Profile page is not applicable for adjuncts. Click Next in the upper right-hand corner of the screen to continue to Employment Information.
4. Enter Employment Information

1. Now enter assignment information:

<table>
<thead>
<tr>
<th>Assignment</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>*Business Unit:</td>
<td>GENERAL</td>
</tr>
<tr>
<td>Include for Automatic Conversion:</td>
<td>No</td>
</tr>
<tr>
<td>*Proposed Person Type:</td>
<td>Contingent Worker</td>
</tr>
<tr>
<td>Projected End Date:</td>
<td>Adjuncts should always have a Projected End Date for their appointment. Per Policy 201, 3.c.4., INITIAL adjunct appointments may be for up to TWO years, and reappointments may be for up to THREE years.</td>
</tr>
</tbody>
</table>

a. Assignment Name: This is the title that will show up in the directory.
b. **Grade:** Faculty – Nonstandard academic rank. (This should always be the rank for an adjunct appt, even if they have another rank for another assignment.)

c. **Department:** Choose value from drop-down menu.

d. **Location:** Search on name of building. It’s formatted as building/floor/room#. If not applicable, select “No Rice Location Assigned.”

e. **Assignment Category:** Adjunct and Unpaid Faculty.

f. Under the **Manager Details** section search for and add the name of the department chair. (Choose their Dept Chair position.)

g. **Manager Type:** Line Manager

2. Click **Next** in the upper right-hand corner of the screen to continue to the Compensation and Other Information page.

3. The Compensation and Other Information page is not applicable for contingent workers. Click **Next** in the upper right-hand corner of the screen to continue to Review the entry for the adjunct.

4. Finally, review and verify all information.
5. When finished reviewing, click **Submit**.

6. You will receive a Warning message after pressing submit. Press **Yes** to continue.

7. Finally, you will receive a Confirmation that your request was submitted. Press **OK** to finish.