# CONTRACTOR PEOPLESOFT ID PROCESSES

**Instruction**: When a contractor is hired, transferred, or termed, the Building Liaison is responsible for entering appropriate information within the IDOH SharePoint site and within PeopleSoft HR to ensure timely coordination of access and resources. Please review each process carefully. Contact IDOH Human Resources with questions.

## CHECK TRANSACTION REQUEST STATUS

To check the status of a transaction you've submitted and to obtain newly created contractor PeopleSoft IDs, use the **Smart HR Transaction Status** found here: ***Menu*** > ***Workforce Administration*** > ***Smart HR Template*** > ***Smart HR Transactions Status.*** As a reminder, please allow up to three business days for SPD HR Data to process requests once submitted. Transaction Status:

- Draft: The form was started, but has not been submitted by the user
- Hired/Added: Processed in the system
- Completed: Processed in the system
- Canceled: Removed from the queue by HR Data

## REACTIVATION REQUESTS

***Menu*** > ***Workforce Administration*** > ***Smart HR Template*** > ***Smart HR Transactions*** > ***SOI_CWR_REACTIVATE***

**Scenario**: Current contractor deactivated for any reason

1. Follow the PeopleSoft HR navigation above.
2. Click Create Transaction.
3. Enter the contractor's PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the contractor's job information: Business Unit, Department, Location Code, Job Code (must be NONEMP), Supervisor ID (must be an active employee or contractor) using this guide to identify correct IDOH fields.
5. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion**.
    a. Follow the Check Transaction Request Status instructions above for updates.
6. Submit an OTC ticket here to update the contractor's Active Directory account.

**Scenario**: Former contractor being rehired as a contractor
*(If this contractor was a state employee, follow the Add a Contingent Worker instructions below.)*

1. Follow steps 1-5 above to reactivate the contractor's PSID.
2. Instead of step 6 above, submit a New Hire access request via the IDOH SharePoint Resource Management form.

## CREATE PEOPLESOFT ID FOR NEW CONTRACTOR

Before submitting a request to add a contractor, ensure the contractor is not already in PeopleSoft either as an employee or contractor. **A person can only have one PeopleSoft ID in the system**. Having more than one PeopleSoft ID can cause significant delays and access issues in various systems. Instructions here.

**NOTE**: You will only have access to see PeopleSoft IDs for those who currently or previously last worked at IDOH. If you know the contractor has worked in another agency, follow the Create PeopleSoft ID for New Contractor but in the comments at the end, enter "Contractor previously worked at [AGENCY NAME] so should already have a PSID."

**Scenario**: Individual has never worked as a SOI employee/contractor and does NOT have a previous PSID

1. View Contingent Worker Record to determine if this person already has a PSID assigned to them. If yes, follow the next scenario guidance or the Transfer section guidance as appropriate.
2. Follow the Add Contingent Worker instructions found on this page using this guide to identify correct IDOH fields. When entering Supervisor IDs, that person MUST be an active state employee or contractor. Once submitted, the form will route to SPD HR Data to review.
3. While this request could take **up to three business days for processing**, check daily for the new PSID via the View Contingent Worker instructions here or follow the Check Transaction Request Status steps.
4. Submit a New Hire access request via the IDOH SharePoint Resource Management form.

**Scenario**: Current or former state employee (in any agency) being rehired as a contractor

**NOTE**: It is highly recommended to allow for a three-business day gap from the date the employee completes state employment to the date they begin as a contractor to avoid a gap in access. State employees cannot be termed in PeopleSoft until the day after their last day worked (usually a Monday). Contractors cannot be "rehired" until this happens. Notify the supervisor of this recommendation.

1. Follow the Add Contingent Worker instructions found on this page; however, enter the previous PSID into the EMP ID field. Use this guide to identify correct IDOH fields. When entering Supervisor IDs, that person MUST be an active state employee or contractor.
2. Once submitted, the form will route to SPD HR Data to review and could take **up to three business days** to be processed; however, check daily for the new PSID via the View Contingent Worker instructions here or follow the Check Transaction Request Status steps.
3. Submit a New Hire access request via the IDOH SharePoint Resource Management form.

## TERMINATE CONTRACTOR PEOPLESOFT ID

**Scenario**: Contractor resigns or is dismissed
*(If the contractor is just switching agencies, divisions, and/or supervisors, follow the Transfer instructions above.)*

1. Follow the Terminate Contingent Worker instructions found on this page.
2. Submit a Termination request via the IDOH SharePoint Termination Form

## TRANSFER

**Scenario**: Contractor transfers to a different agency, supervisor, location, and/or division but is still a contractor

***Menu*** > ***Workforce Administration*** > ***Smart HR Template*** > ***Smart HR Transactions > SOI_CWR_JOBDAT_CHG***

1. Follow the PeopleSoft HR navigation above.
2. Click on Create Transaction.
3. Enter the contractor's PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the contractor's updated job information using this guide to identify correct IDOH fields. When entering Supervisor IDs, that person MUST be an active state employee or contractor.
4. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion.**
    a. Follow the Check Transaction Request Status instructions above for updates.
5. Submit an OTC ticket here to update the contractor's Active Directory account.

## MODIFY CONTRACTOR PERSONAL INFORMATION (DOB, Name, Driver's License)

**Scenario**: Active contractor changes their personal data such as name, date of birth, driver's license

***Menu > Workforce Administration > Smart HR Template > Smart HR Transactions***

1. Follow the PeopleSoft HR navigation above. Use Smart Form ***SOI_PERSDATA_CWR.***
2. Click Create Transaction.
3. Enter the contractor's PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the contractor's updated personal information. Include information in all the fields even if it is not changing. NOTE: National ID is their driver's license. Only include alphabetical characters if their license number contains it. *Do not include state abbreviations in this value.*
5. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion.**
    a. Follow the Check Transaction Request Status instructions above for updates.

## MODIFY CONTRACTOR ADDRESS

**Scenario**: Active contractor changes their address

***Menu > Workforce Administration > Smart HR Template > Smart HR Transactions***

1. Follow the PeopleSoft HR navigation above. Use Smart Form **SOI_CWR_ADDRUPD.**
2. Click Create Transaction
3. Enter the contractors' PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the updated information: Address Type (most commonly "business"), street address, city, state, county (defaults to Marion, update as necessary*)*
5. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion**.
    a. Follow the Check Transaction Request Status instructions above for updates.

## MODIFY CONTRACTOR EMAIL ADDRESS

**Scenario**: Active contractor changes their email

***Menu > Workforce Administration > Smart HR Template > Smart HR Transactions***

**NOTE**: Email is used to notify contractors regarding required training.

1. Follow the PeopleSoft HR navigation above. Use Smart Form **SOI_CWR_EMAILUPD.**
2. Click Create Transaction.
3. Enter the contractor's PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the contractor's updated email address. The email type defaults to "business" and is marked preferred. Make changes as necessary.
5. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion.**
    a. Follow the Check Transaction Request Status instructions above for updates.
6. Submit an OTC ticket here to update the contractor's Active Directory account if necessary.

## MODIFY CONTRACTOR PHONE NUMBER

**Scenario**: Active contractor changes their phone number

***Menu > Workforce Administration > Smart HR Template > Smart HR Transactions***

1. Follow the PeopleSoft HR navigation above. Use Smart Form **SOI_CWR_PHONEUPD.**
2. Click Create Transaction.
3. Enter the contractor's PeopleSoft ID in the Empl ID section and click Continue.
4. Enter the contractor's updated phone number.
5. Select Phone Type ("business" is most common and will be marked as preferred)
6. Once all information is entered, click Save and Submit. This form routes to HR Data for review upon submission. **Please allow up to three business days for completion.**
    a. Follow the Check Transaction Request Status instructions above for updates.
7. Submit an OTC ticket here to update the contractor's Active Directory account if necessary.