Candidate Form Submission - User Guide for Beeline Workers

CONTINGENT WORKER OPERATIONS CENTER (CWOC)

September 2022

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1. Introduction

Individuals contracted to provide services to JPMorgan Chase Bank, N.A and/or its affiliates (JPMC) who require unescorted building access and/or access to JPMC systems must be submitted to the Contingent Worker Operations Center (CWOC) Group to complete the contingent worker onboarding process. In instances where candidate selection and onboarding occurs within the Beeline application, individuals will be submitted in Beeline for any open requisition. After the offer is accepted by you, the supplier, the individuals should be submitted for onboarding through the Contingent Worker Onboarding module in Supplier Central.

Supplier Point of Contact (SPOC)

The Supplier is responsible for the oversight of their workforce that has been positioned within JPMC. The Supplier Point of Contact (SPOC) acts as a process conduit for consistency and sustained alignment with JPMC processes/policies. SPOCs also serve as main points of contact with the CWOC Group regarding the onboarding of contingent workers. Some of the JPMC related engagement details may not be known by the SPOC; the SPOC will need to leverage a Request report from Beeline to gather the required information to complete the Candidate Form accurately and in its entirety.

During SPOC registration, CWOC will provide a username to the SPOC for the initial log in to the Contingent Worker Onboarding within Supplier Central. The SPOC should first change the password then proceed with submitting a candidate. For Supplier Central sign in issues, here are a few tips to try for resolution.

- Ensure you are using your *Username* not your email address
- Use the “forgot password” option to reset your password you will receive a one-time auth code. Check your junk/spam. If you still have not received an email check with your IT team to ensure any @JPMCHASE.com emails are “whitelisted” so they are not blocked.
- When resetting your password ONLY use **@#$%^&*=** as special characters
- Only open one window and/or web browser when using the CWOC Online Candidate Form
- Clear the cache of the web browser you are using:
  - **Internet Explorer:** Tools > Internet Options > On the General tab, locate the “Delete” button > Check the “Cookies and website data” and select “Delete”
  - **Chrome:** Options (3 dots) on the top right-hand corner > Settings > Type “cache” in the search settings box > Click “clear browsing data” > Click “Clear data”
  - **Firefox:** Select “History” from the menu on the top > Select “Clear recent history” > Ensure “Cookies” and “Cache” have a check mark > Click “Clear Now”

JPMC Assignment Sponsor

The Assignment Sponsor is a JPMC employee who is accountable, along with Supplier, for the successful onboarding an oversight of contingent workers. The Assignment Sponsor is responsible for attaining any needed approvals during the onboarding process. The Assignment Sponsor will not have access to the CWOC Onboarding Candidate Form Submission.

2. Contingent Worker Operations Center

Candidate Form Submissions

Statuses displayed on this page indicate whether a Candidate Form is still in Draft or Submitted to the CWOC Group. The SPOC can refer to the *Export Report* feature within this page for worker onboarding statuses.

Draft Submissions

- This section displays all Candidate Forms currently in *Draft*.
- The Last Saved Date is the last date the Form was saved.
- To access a *draft* Candidate Form, click on the Edit button. All SPOCs for the supplier will be able to edit a *draft* Candidate Form; however, ***only*** the creator of the draft Candidate Form will have the ability to enter/edit/view candidates' personal information.
- To delete a draft Candidate Form, select the Delete button; ***only*** the creator of the *draft* Candidate Form will have the ability to delete.

Submissions

- This section displays all Candidate Forms that have been submitted for workers still in the onboarding process or onboarded (Ready to Work email sent) within the last fourteen days.
  - *Pending* – Candidate successfully submitted, pending review and processing by CWOC
  - *SID Created: A123456* – SID created/reactivated; pending clearance and/or additional approvals
  - *Rejected* – Submission was rejected due to inaccurate/incomplete information; an email would have been sent to the SPOC with details; the submission will display visible for three days following the rejection
  - *Onboarded* – Ready to Work email sent to the Assignment Sponsor; the SID will appear under Submissions, and on the resulting file from *Export Report*, for fourteen days after the email has been sent

Submit New Candidate

- Click the Submit New Candidate button to start a new Candidate Form; this can be used for new contingent workers and returning workers with a SID from a prior assignment
- While completing the Candidate Form, the SPOC may return to a previous Step or forward to the next Step. The SPOC may also *Save* the Candidate Form as a *Draft* or Close the Candidate Form with/without saving it. The Candidate Form includes the following 4 Steps.
  - Supplier Details
    - The Supplier is the source of this information.
  - Engagement Details
    - The Supplier should reference their Request report for this information.
  - Candidate Information
    - The Supplier should coordinate with the candidate to gather this information.
  - Review & Submit
    - This step allows the SPOC to review all entries from the prior 3 Steps and return to any given Step to make edits before submitting.

3. Contingent Worker Onboarding

Supplier Details

- **Supplier Name**
  - The supplier name will automatically populate, as it appears in the CWOC application.
- **Supplier Code**
  - The supplier code will automatically populate, as it appears in CWOC application.
- **Subcontractor**
  - If worker is a subcontractor of the supplier, slide toggle to Yes. All others, toggle should remain at No, the default setting.
- **Subcontracting Company Name**
  - If applicable, enter the supplier name for the subcontracting company.

Engagement Details

- **Service Type**
  - Select engagement type, which is established within the contract terms.
  - For Beeline Staff Aug workers, the Service Type should always be *Temp/Individual Contractors*
- **Payment Type**
  - Select engagement type, which is established within the contract terms.
  - For Beeline Staff Aug workers, the Payment Type should always be *Time & Materials*
- **IT / Non-IT**
  - Technology roles should be supplemented by the IT indicator being set to IT. All other roles should remain at Non-IT, the default setting.
- **Contract Source**
  - Valid selection options:
  - For Beeline Staff Aug workers, this should always be *Beeline Staff Aug*
- **Contract Number**
  - Enter the applicable Beeline Request number associated with the onboarding request.
- **Contract End Date**
  - The expiration date of the request; this end date will automatically populate based on the duration of the request.
- **Assignment Start Date**
  - After the Candidate Form is submitted to CWOC, the Start Date will automatically be changed to 30 days from the date of submission to account for the full timeframe estimated for CWOC handling and Pre-Employment Screening (PES) processing.
- **Assignment End Date**
  - Enter the worker's expected assignment end date, which may be up to one year in the future from the date of submission.
  - The expected assignment end date cannot exceed the contract end date (duration of Beeline assignment).

- **Req Number (Optional)**
  - Enter the applicable requisition number for the onboarding request.
- **Assignment Sponsor SID**
  - Enter the Standard ID of the Assignment Sponsor, an active JPMC employee, who is responsible for overseeing the worker throughout the assignment.
  - This can be obtained from the Request report
- **Work Location**
  - Enter the worker's work location code. Work location is a 5 digit code; add a leading zero if code is only 4 digits.
  - This can be obtained from the Request report
- **Cost Center**
  - Enter the JPMC Cost Center, the financial business unit through which the worker is being funded.
  - This can be obtained from the Request report
- **Job Code**
  - Enter the JPMC CW Job Code for this engagement.
- **Hourly Bill Rate Currency** (Optional)
  - Select the currency of payment of the contingent worker providing services.
- **Hourly Bill Rate** (Optional)
  - Enter the hourly bill rate for the contingent worker providing services.
- **Will supplier personnel have access to Confidential Supervisory Information which includes any document prepared by, on behalf of, or for the use of JPMC's bank regulators, such as exam reports, MRAs, or confidential communications between JPMC and its regulators (including materials prepared by JPMC)?**
  - This can be obtained from the Request report
  - Confidential Supervisory Information (CSI) is defined as follows:
    - documents prepared by a bank regulator reflecting the opinions, deliberations or recommendations of the regulator;
    - internally prepared documents of the Firm that reflect or contain the opinions, deliberations or recommendations of bank regulators; and
    - internally prepared documents concerning the Firm’s response to regulators’ opinions, deliberations or recommendations, or their requests.
- **Requires Badge?**
  - If worker requires a badge for unescorted building access, select Yes. All others, select No.
- **Requires System Access?**
  - If worker requires access to JPMC systems, select Yes. All others, select No.
- **Requires Seat?**
  - If worker requires a seat at a JPMC work location, select Yes. All others, select No.
- **Requires Email?**
  - If worker requires a JPMC email account, select Yes. All others, select No.
- **Is this submission for an intern?**

- If worker is an intern, select Yes. All others, select No.

- **Is it a requirement that the worker be a student?**
  - If worker is required to be a student, select Yes. All others, select No.
  - If Yes, enter Name of the Emerging Talent Program

Candidate Information

- **Candidate Role Type**
  - Select candidate role type; Beeline Staff Aug workers should be submitted as *Contingent Worker*
- **Last Name**
  - Enter the worker's legal last name - LEGAL NAME ONLY.
- **First Name**
  - Enter the worker's legal first name - LEGAL NAME ONLY.
- **Birth Date**
  - Enter the worker's date of birth (MM/DD/YYYY).
- **National ID**
  - Enter the worker's unique National Identity number.
    - For workers assigned within the United States, enter the 9-digit Social Security Number (SSN). (If a U.S.-based worker does not yet have a SSN, please supply a temporary alternate 9-digit number, starting with 988 +6 additional digits specific to the worker; for example, a supplier employee number.)
    - For workers assigned outside of the United States, enter the National ID used in the specific country of his/her work location.
- **Home Zip**
  - Enter the worker's home postal code/zip code.
- **Personal Email**
  - Enter the worker's primary ***personal*** contact email, which cannot be the worker's company email.
- **Personal Contact Phone**
  - Enter the worker's primary cell phone number excluding the country code and preceding zero. The country code will be picked from the work location provided in the submission
- **Prior SID** (Optional)
  - If this is a former worker, enter the worker's prior Standard ID.
- **How did this candidate come to your attention?**
  - Select appropriate response.
    - Valid selection options:
      - 1. This person was sourced by supplier to fill my business requirements.
      - 2. I identified this person based upon a prior personal or professional relationship. This person was not identified to me by anyone else.
      - 3. This person was identified to me by a JPMC employee.
      - 4. This person was identified to me from some other source, other than 1-3.
        - If 2, 3 or 4 is selected, ensure the referral has been submitted in the Referral Portal at least 24 hours prior to submitting this Candidate Form.

- **Referring Party's SID**
  - If the candidate was identified by a JPMC employee (option # 3 selected above), enter the Standard ID of the JPMC employee.
  - If option # 1, 2 or 4 was selected above, this field should remain BLANK.
- **Referring Party's First Name**
  - If the candidate was identified by a JPMC employee (option # 3 selected above), enter the first name of the JPMC employee.
  - If option # 1, 2 or 4 was selected above, this field should remain BLANK.
- **Referring Party's Last Name**
  - If the candidate was identified by a JPMC employee (option # 3 selected above), enter the last name of the JPMC employee.
  - If option # 1, 2 or 4 was selected above, this field should remain BLANK.
- **Is this worker a student?**
  - Select appropriate response.
- **Is this worker related to an employee of JPMC?**
  - Select appropriate response.
    - If Yes, provide SID of Relative Employed by JPMC
    - If Yes, provide Relationship to Employee
    - Valid Selection options:
      - Not Specified
      - Other
      - Spouse or Domestic Partner
      - Sibling or Step-sibling
      - Child or Step-Child
      - Parent, Step-Parent, or Legal Guardian
      - Related by Marriage (In-Law)
      - Aunt or Uncle
      - Niece or Nephew
      - Cousin
- **How did you, the Supplier, identify this worker?**
  - Select appropriate response.
  - Valid selection options:
    - 1. Pre-Identified by JPMC
    - 2. Sourced-Referral
    - 3. Sourced- Supplier Database
    - 4. Sourced- Online Careers Site
    - 5. Sourced- Advertisement
    - 6. Sourced- Social Media
    - 7. Employed by Supplier
    - 8. Networking Event/User
- **Business Justification Category**
  - Select appropriate response
  - Valid selection options:
    - Clerical / Administrative
    - FTE Pipeline

  - FTE/Vacancy Coverage
  - Leave of Absence (Incl. Paternal)
  - Project
  - Regulatory
  - Site Technology Support
  - Specialized Skills / Expertise
  - Vendor Proprietary / Product (OEM)
  - Volume Driven

- **If Contingent worker is in UK: is this worker Supplier PAYE (Pay As You Earn)?**
  - Select appropriate response of Yes or No.
  - This field will only be available after the Work Location is populated and if the location is in the UK.
- **Add Another Candidate**
  - A supplier can submit multiple candidates at one time provided the Engagement Details are the same

Review & Submit

- Review completed fields for accuracy.
- If any field needs to be corrected, go back to the appropriate page.
- Once all fields have been reviewed and Candidate Form is ready for submission, click **Submit Candidate** at the bottom of the page.
- Confirmation dialogue box will be displayed.
  - To return to the Review page, click **Cancel**.
  - If ready to submit the Candidate Form, click **Submit** to proceed.
    - Candidate Successfully Submitted dialogue box will be displayed.
      - Opt to submit another candidate with the same Supplier and Engagement Details pre-populated in the Candidate Form or return to the Candidate Form Submissions homepage.