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# Candidate Form Submission - User Guide

CONTINGENT WORKER OPERATIONS CENTER (CWOC)

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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. The JPMC Assignment Sponsor is required to provide you with the Contingent Worker Requisition Number (CWOR) to complete the Candidate Submission Form accurately and in its entirety. For Beeline this will be the Beeline Requisition Number that is entered into the Requisition Number field.

After SPOC registration, CWOC will provide a username to the SPOC for the initial log on into Supplier Central. The SPOC should first choose *forgot password* then proceed with the prompts that lead to submitting a candidate.

## **JPMC Assignment Sponsor**

The Assignment Sponsor is a JPMC employee who is accountable, along with Supplier, for the successful onboarding and oversight of contingent workers. The Assignment Sponsor is responsible for providing SPOCs with the Beeline Requisition Number to complete the Candidate Submission Form accurately and in its entirety as well as attaining any needed approvals during the onboarding process. The Assignment Sponsor does not have access to the CWOC Onboarding Candidate Form Submission.

## 2. Supplier Central Overview

### Candidate Form Submissions

Statuses displayed on this page indicate whether a Candidate Form is still in Draft or Submitted to the CWOC Group.

#### 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*, click on the Edit button. All SPOCs for the supplier will be able to edit a *draft*; **only** the creator of the *draft* will have the ability to enter/edit/view candidates' personal information
- To **delete** a *draft*, select the Delete button; **only** the creator of the *draft* will have the ability to delete a form.

#### 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. Resubmissions will require reentry in a new form.
  - *Onboarded* – Ready to Work email sent to the Assignment Sponsor; the SID will appear under Submissions, and on the *Export Report*.
- The SPOC can refer to the *Export Report* feature within this page for the contingent worker(s) onboarding/screening status.

#### 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 move to previous Step or 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
    - Will automatically populate, as it appears in the CWOC application
  - Engagement Details
    - Will automatically populate once you enter the Beeline Requisition Number provided by the JPMC Assignment Sponsor
    - This data is not editable
  - 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. Candidate Submission Form

#### Candidate Information

##### ■ Engagement Details

- **Enter in the Beeline Requisition Number into the Requisition Number field**
  - Will automatically populate once you enter the Beeline Requisition Number provided by the JPMC Assignment Sponsor
  - This data is not editable

##### ■ Candidate Role Type

- Select candidate role type.
- Valid selection options:
  - Acquisition
  - Contingent Worker
    - Third party worker secured through a contracted industry Staffing Supplier as their employee deployed to conduct services at JPMC.
  - Joint Venture
  - Non-Hiring Intern
    - Intern working at JPMC under a pre-approved Strategic Internship Program.
  - Secondee - Client Training
    - Client employee deployed to JPMC under contractual agreement to receive On the Job training while conducting services at JPMC.
  - Secondee - Law Firm
    - Law Firm employee deployed to JPMC conducting services for JPMC.
  - Secondee - Regulatory Training
    - Government employee deployed to JPMC under contractual agreement to receive On the Job training while conducting services at JPMC Non-Hiring Intern

##### ■ First Name

- Enter the worker's legal first name - LEGAL NAME ONLY.

##### ■ Last Name

- Enter the worker's legal last name - LEGAL NAME ONLY.

##### ■ Pronouns (optional)

##### ■ Preferred First Name (optional)

##### ■ Preferred Last Name (optional)

##### ■ 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.
- **Cell Phone Country**
  - Use the drop-down option to choose the country code
- **Cell Phone**
  - Enter the worker's primary cell phone number excluding the country code and preceding zero.
- **Prior SID (Optional)**
  - If this is a former worker, enter the worker's prior Standard ID.
- **CW Work Location**
  - Will pre-populate based on the Beeline Request Number, the worker(s) can be aligned to a different location, if needed)
- **How did this candidate come to the Assignment Sponsor's 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.
- **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 Group

■ **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

■ **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.

■ **Assignment End Date**

- Will not pre-populate based on the CWOR, the worker(s) can be updated to one year in the future from the date of submission.
- The assignment end date cannot exceed the contract end date.

■ **Hourly Bill Rate Currency (optional)**

■ **Add Another Candidate**

- A supplier can submit multiple candidates at one time provided the Engagement Details are the same

**Categories offered based on regional requirements.**

■ **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.

## **Review & Submit**

- Review completed fields for accuracy.
- If any field needs to be corrected, go back to the appropriate page.
- **Note-** Assignment Start Date is automatically set to 30 days from the date of submission to account for the full timeframe estimated for CWOC handling and Pre-Employment Screening (PES) processing.
- 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.