

## JPMORGAN CHASE (JPMC) CONTINGENT WORKER SINGLE POINT OF CONTACT TRAINING

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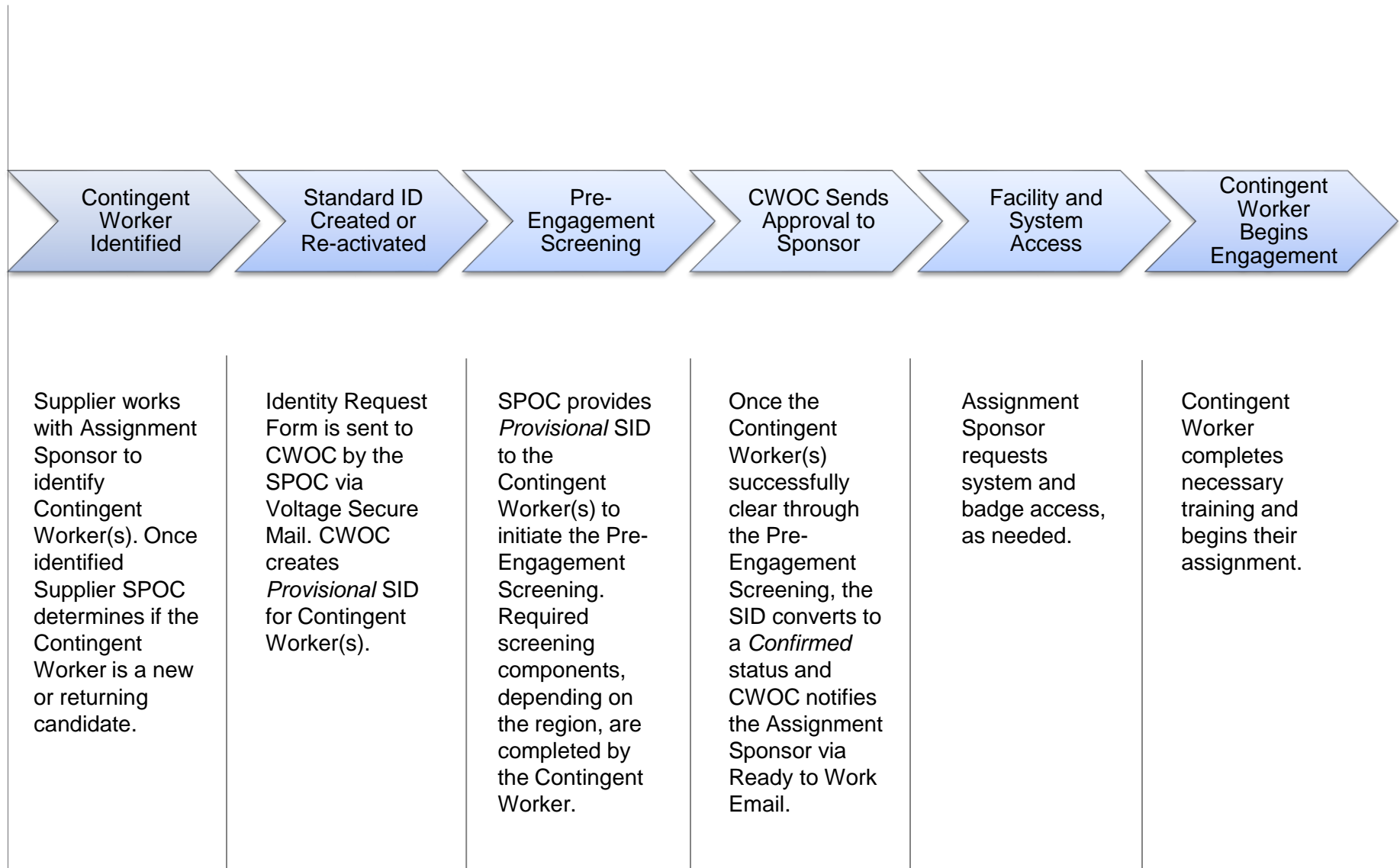
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# Single Point of Contact's Roles and Responsibilities

A Single Point of Contact (SPOC) is an employee of the supplier who will submit all Contingent Worker information accurately and securely to the Contingent Worker Operation Center (CWOC). Suppliers can designate a maximum of eight people in their organization to serve as SPOCs. At least one SPOC must be designated prior to commencing any onboarding transactions. Responsibilities of the SPOC are outlined below:

- Serve as the main point of contact with the CWOC Group regarding the onboarding of Contingent Workers
- Ensure supplier personnel filter all requests to CWOC or other internal J.P. Morgan departments through the registered SPOC
- Works directly with the internal JPMC Assignment Sponsors to deliver a streamline onboarding process
- Initiates and ensures that Contingent Worker(s) complete Pre-Engagement Screening and meet assignment authorization requirements for the assignment location
- Follow-up, resolve, and serve as the main source of contact to deal with issues during Contingent Worker onboarding
- Know the distinction between *Provisional* versus *Confirmed* Standard IDs (SIDs)
  - *Provisional* SID – Status of the SID prior to clearing through the Pre-Engagement Screening
  - *Confirmed* SID – Status of the SID once the Pre-Engagement Screening is successfully completed and 'Cleared' status appears on the SPOCs End of Day Report

# Contingent Worker Onboarding Lifecycle



## Types of Contingent Workers

There are two types of Contingent Workers:

- New
- Returning

A Contingent Worker that already has an assigned SID due to a previous assignment or employment at JPMC, is considered a returning worker. Supplier SPOCs should identify returning workers and provide their previously assigned SID if known.

Prior JPMC employees (including JPMC legacy organizations) require a Human Resources re-entry check prior to the onboarding process to ensure that the individual is permitted to return to JPMC. The re-entry check is important in that it ensures that the individual was not removed for cause, or if the job was eliminated, that sufficient time has passed to return. For a former JPMC employee, the Supplier SPOC submits a Re-entry Check Form to the CWOC Group for the re-entry eligibility status. If the former employee is 'eligible', the SPOC may consider the individual as a candidate for an assignment.

When candidates (new, returning, or eligible former employees) have been selected for assignments, it is the responsibility of the Supplier SPOC to securely submit the required onboarding information via the Identity Request Form to the CWOC Group.

## Identity Request Form

The Identity Request Form (IDRF) is used by the supplier SPOC to input the Contingent Worker's Information. It is the responsibility of the SPOC to submit the Identity Request Form in its entirety and as accurately as possible. While some of the JPMC related information is not available to the SPOC, it is one of the SPOC's duties to reach out to the Assignment Sponsor to gather the required information to submit on the form. The Legend tab provides an overview including who is responsible for completing each field, the Supplier or the Sponsor.

Once a secure email containing the IDRF has been submitted to CWOC, CWOC will review the submission for quality. Incomplete or inaccurate submissions will be rejected and the Supplier SPOC will be notified via email. Clean submissions will be processed and the Assignment Sponsor will receive an auto-generated email containing the Contingent Worker's *Provisional* SID. Supplier SPOCs will receive an End of Day Report each day with the SID results.

A *Provisional* SID permits the Assignment Sponsor to pre-order the following items to jumpstart the Contingent Worker's ability to begin their assignment once his/her SID switches to a *Confirmed* SID status.

- Workspace
- Phone
- Desktop Hardware (PC, Printer, VDI)

## Pre-Engagement Screening

The SPOC initiates Pre-Engagement Screening (PES) by providing Contingent Worker(s) with their *Provisional* SID found on the End of Day Summary Report. It is the Contingent Worker's responsibility to follow the instructions for PES found in the [Global Contingent Worker Pre-Engagement Screening \(PES\) Initiation Guide](#). Specific screening requirements and turn-around times will vary by country and are based on the Contingent Worker's physical work location. Each End of Day Summary Report will contain the Contingent Worker's PES results:

Screening Status	Description
Cleared	Worker has Cleared PES.
Not Cleared	Candidate is ineligible at this time. If you require further information regarding PES, the candidate can contact GWS.
Pending GS&I Review	Validation of PES record is required.
Rejected - Referral Related	Request was rejected. If you require further clarification, please contact CWOC.
SID Terminated - PES not Completed by Start Date	SID terminated because there is no record of cleared PES by the start date.

Contingent Workers may be privy to additional internal checks which are outlined within the "Pending Approval(s)" section and defined on the Legend tab of the EOD Summary Report. For more detailed information, please refer to the [Contingent Worker Operations Center Onboarding Toolkit](#)

The Assignment Sponsor will receive notification of the Contingent Worker's successful PES completion through a "Ready to Work" email which updates the Contingent Worker's SID status to *Confirmed*. Once the Ready to Work email is released, the Assignment Sponsor and Contingent Worker may begin to coordinate the Contingent Worker's assignment details (Logistics, Start Date, Time, etc.)

## Voltage Secure Mail

**Voltage SecureMail is a JPMC enterprise-wide solution for securing email communications with internal and external recipients**

- SPOCs do not need any special software for incoming/outgoing secure messages.
- Both the message body and any attachments are always protected provided the recipient responds to the initial message received from CWOC.Group@jpmchase.com
- It will work with any fully functional browser on any platform.
- SPOCs need to create an account and test Voltage SecureMail during their initial setup with CWOC before they can successfully submit an IDRF with Contingent Worker information.

## Resources

The majority of the forms needed for the onboarding process can be found on the JPMC internet on the [Supplier Personnel Policies](#) page. Forms housed on this page include:

- The Re-entry Check Form- This form is completed by Contingent Workers who have previously worked as an employee of JPMC or a JPMC heritage company.
- Identity Request Form- This form must be completed and submitted by the Supplier SPOC, with input from the Contingent Worker and the Assignment Sponsor, for each worker in order to obtain a JPMC *Provisional* SID and start the onboarding process.
- Global Contingent Worker Pre-Engagement Screening (PES) Initiation Guide - used by the Supplier and Contingent Worker to initiate the required regional background screening.
- Contingent Worker Operations Center Onboarding Toolkit – contains detailed information Assignment Sponsors and Suppliers need to onboard new and returning Contingent Workers to JPMC.

### Contingent Worker Operations Center (CWOC)

- Email – [CWOC.Group@jpmchase.com](mailto:CWOC.Group@jpmchase.com)
- Helpline – (201) 595-1951 or (855) 900-2962

For all PES related inquiries please reach out to one of the Global Workforce Screening's regional teams:

- Europe / Middle East / Africa - [EMEA.SECURITY.CHECKING@jpmorgan.com](mailto:EMEA.SECURITY.CHECKING@jpmorgan.com)
- United States /Canada - [gws.contingent.workers@chase.com](mailto:gws.contingent.workers@chase.com)
- Latin America / Bahamas - [jpmc.latam.pes@jpmchase.com](mailto:jpmc.latam.pes@jpmchase.com)
- Asia Pacific - [Asia.PES@jpmorgan.com](mailto:Asia.PES@jpmorgan.com)