Enterprise - Commonly Asked Questions - Orders & Assignments

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Q: What is the difference between an order and an assignment?

A: An order is the request for candidates from the customer, i.e.: Please send 4 data entry operators. An assignment is the actual fulfillment of that order (4 employees have been placed on assignment).

Q: How do I view all of my unfilled orders?

A: On the order search form, select a filled status of unfilled, an active status of active, or all statuses. Click search. If desired, the search can also be filtered by branch or a specific representative using the "Branch" and "RepName" drop down menus.

Q: Where can I find all of the employees assigned to an order?

A: All employees that are currently-or have ever been-assigned to a position will be displayed on an order's visifile. To view any of the assignment's details, double-click on it under the "assignments" section of the order visifile.

Q: Am I able to make a copy of the current order being displayed?

A: Yes. From the order's record you wish to copy, click the actions menu and select copy order.

Q: When I try to assign an employee to the order, or make them a candidate, I receive an assignment restriction that their employee status is unwashed. Why can't I assign (or consider) this employee?

A: On the details section of their employee record, the washed status needs to be set to familiar. Prior to changing their status to familiar, verify that all on-boarding processes have been completed for them. After confirming all processes are complete, update the employee's washed status to familiar using the drop down. Provided there were no other assignment restrictions to address, they can now be assigned or made a candidate on the order.

Q: When I try to assign an employee to the order, or make them a candidate, I receive an assignment restriction of customer status (hold for credit check) prevents the assignment creation. Why can't I assign (or consider) this employee?

A: On the customer record's details section, their status needs to be set to active. If a first-time customer has a status of prospect when the order is created, the status will automatically update to hold for credit check. If the new customer authorization process has been completed, using the status drop down, change the status to active. You will now be able to assign employees and attach candidates to the order.

Q: What information needs to be completed on the order before creating assignments?

A: There are two fields on an order's details form that should be completed before assignments are created, they are: customer & department. It is strongly recommended that the worker comp code & worksite are completed, as well. Other helpful fields include: (employees) required, order type, job title, start date, pay rate, bill rate, pay periods & contacts.

Q: Why aren't there any available purchase order numbers listed in the po setup form?

A: Purchase order numbers must be added to the customer/invoice set up/po setup form or pay/bill/other/po setup form before they will be visible in the po number drop down menu on the order/details/po setup form. If they still do not appear and the order is for a department, ensure the purchase order is attached to that department record. If it is attached at a higher level of the customer, confirm that the "apply to all child departments" box is checked on the po setup form.

Q: I'm unable to select the multiplier which applies to this order, how do I pull it in?

A: First, the multiplier code must be added to the database by a system administrator. Then, it needs to be added to the multiplier codes area on the defaults section of a customer record. If this order is for a department, make sure that the multiplier code is attached to the department record. If the code already exists on the customer's primary record (or a level higher than the current department in their org. structure), click the "apply multiplier codes to departments" check box and save. Once these changes above have been saved, multiplier codes will be available on the order details form.

Q: I assigned the wrong person to an order. What should I do?

A: On the details section of an assignment, enter the "actual date ended" to match the start date and change the assignment's status to "deleted mistakenly entered".

Q: What needs to be on the assignment for accurate payroll and invoice processing?

A: The assignment record determines what shows up on in the time entry area, thus what will be calculated and displayed on the paycheck and invoice. As a result, the job title, start date and rates (bill rate, pay rate, salary bill, salary, unit bill, unit pay, overtime rates) need to be accurate on the assignment details page. It is also very important to end assignments in a timely manner, so they will no longer continue to show up in time entry after the assignment has ended; this requires the actual date ended and status be entered.

Q: Is it possible to copy an assignment?

A: No, an assignment needs to be created from the order record. If an employee is being brought back at a later time for the position, the employee can be assigned to the order they were previously assigned to. If the previous order has been closed, copy the order, verify its information is still correct, and assign the employee to the copied order.

Q: How do I document that an employee has pulled a no-show?

A: If it is the first day of the assignment, the employee will not be paid, nor will the customer be billed: enter the start date as the actual date ended and update the assignment's status drop down to no show/no call. If the no-show happens after the assignment has begun (the employee fails to return from lunch or or on any subsequent days), update the "actual date ended field" to the date the employee did not show up and use the status of "no show/no call but has hours to be paid/billed"; this will still create a timecard for the current billing period, but will not do so moving forward.

Q: The wrong worker comp code is listed for the assignment. How do I change it?

A: The worker comp code is being generated from the order; therefore, if it is wrong on the assignment, it was wrong on the order. Navigate to the order record this assignment was based on and update the worker comp dropdown to the desired code. Upon saving, you will be prompted to update the assignment.

Q: The wrong worksite is listed for the assignment. How do I change it?

A: The worksite is being pulled from the order this assignment was based on. Update the worksite on the order details screen and, upon saving, you will also be prompted to update the assignment.

Q: How is a 1099 consultant or sub-contractor assignment differ from an assignment for a W2 employee?

A: On the assignment details form, a non- W2 employee's assignment will display their vendor name (staffing company name or a sub-contractor, employee name, or their company name for a 1099) in the company field and the W2 check box will be unchecked. For a sub-contractor, the pay rate amount is what will be paid to the vendor, not the employee. The "other agency pay" field on the assignment details page can be used to reflect what the employee's actual pay rate will be.

Q: I assigned a 1099 consultant/sub-contractor, but the company field isn't displaying correctly and the W2 check box is still checked. What went wrong?

A: Before an assignment is created for a consultant or sub-contractor, the vendor field on the employee details form needs to be populated with the correct vendor name (staffing company name for a sub-contractor, employee name, or their company name for a 1099). If the appropriate vendor isn't available, the vendor record needs to be added by a system administrator. This change will not affect an assignment that has already been created, so on the assignment details page, key in the "actual date ended" so it matches the start date and change the status to deleted/mistakenly entered. After ending the assignment ,open the order and reassign the employee.

Q: The employee is going to be converted to full- time with the customer. What needs to be done on the assignment?

A: On the assignment details page, update the "actual date ended" field so that it displays the last day the employee will be employed by your company. The status code should be changed to hired perm (or something similar). If a conversion fee applies, it can be entered as a one time adjustment either on the assignment or during time entry, depending on your company's preference.

Q: How do I document the employee's performance on the assignment?

A: If the assignment is ending, the status on the assignment details can be updated to indicate their performance. Assignment statuses, such as excellent, good, released-not a good fit, are a performance snapshot which allow other users to quickly grasp an employee's previous assignment performances. The status will be displayed on the employee/visifile and order/visifile forms. Additional information can be added in the perf. note field on the assignment/details form or in the assignment/message area.

Q: What is the create timecard function in the actions area used for?

A: If the employee submits a late timecard and their assignment has already ended, a transaction will not pull into time entry. Clicking on create timecard from the assignment actions will insert a one-time transaction into time entry so that late timecard can be paid. Make sure that you select the correct weekend date for the late time card for reporting.

Q: The assignment rates have changed. Can I just update the rates on the assignment?

A: Potentially. Changing the rates on the current assignment has the potential to cause some problems for payroll and invoice processing. For example: The rates are changed and go into effect as of 1/5/2016. That same afternoon, a pay clerk pulls in the assignment information to create time entry transactions for weekend bill 1/3/2016. Since the assignment rates have already been updated, the rate changes are going to be applied a week early.

-OR-

The deadline is missed to enter these rate changes and a retroactive paycheck needs to be processed to correct the rates from a previous week. To avoid these issues, click on the assignment record's actions menu and select extend assignment. At the prompt, enter the date when the new rates should go into effect. In the assignment details form that appears enter the new rates that will apply. The original assignment will have been updated so that the actual date ended is the day prior to the start date of the new assignment and the status will automatically be entered as rate change.

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