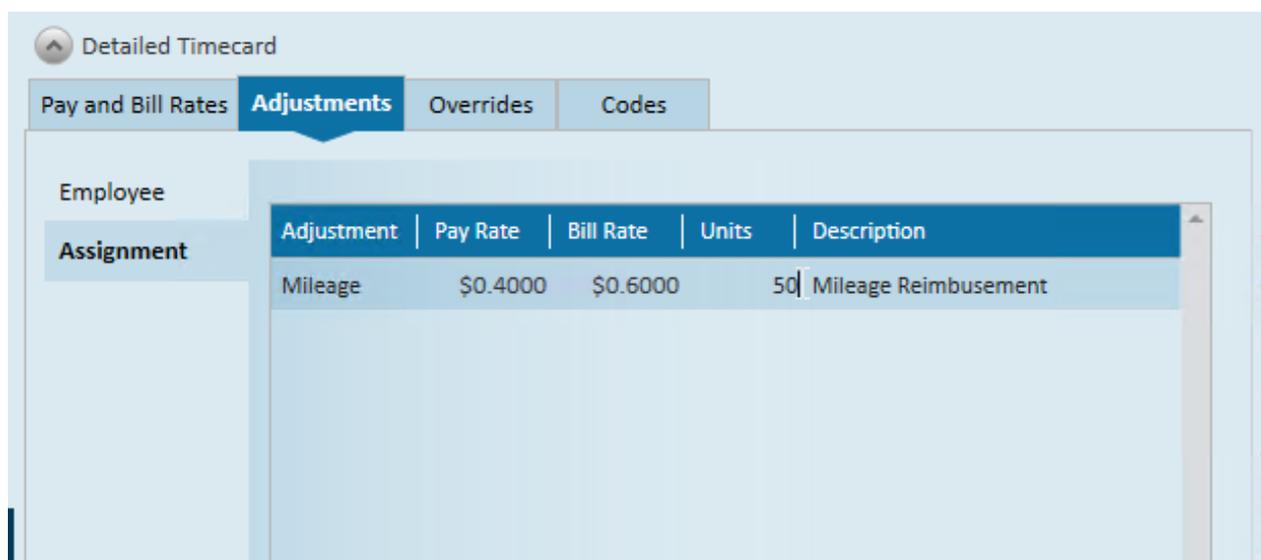


Enterprise - How to Utilize Assignment Adjustments

Last Modified on 01/08/2020 3:40 pm CST

What are Assignment Adjustments?

Assignment adjustments allow you to add assignment specific reimbursements, charges, and/or billing amounts to a transaction each week. These adjustments are reoccurring, just like [employee adjustments](#), but are specific to the assignment being worked and require that units be entered on them. Great examples of assignment adjustments include reimbursements such as mileage, phone plans, bus passes, etc. These options may differ in total amount for each week worked.



Adjustment	Pay Rate	Bill Rate	Units	Description
Mileage	\$0.4000	\$0.6000	50	Mileage Reimbursement

Adding an Assignment Adjustment to an Assignment or Order

1. Navigate to the Order or Assignment record you want to add the adjustment to.
 - Adding the adjustment on the order will automatically add the adjustment to any new assignment created but will not update current assignments
2. Select Details > Adjustments on the Left

Regions hospital, Primary
 Nurse Ansethetist
 0 of 1 positions filled
 Customer ID: 4295014990
 Order ID: 4295092053
 Branch: Eagan

visifile
 details
adjustments
 attendance
 interest codes

order adjustments

View on Order Record

Grier, Gus
 Cotton Candy, Production Worker
 Assignment ID: 4301407051
 Order ID: 4295091894

details
 accruals
adjustments
 calls
 commission allocations
 integrations

assignment :
 Drag a column he
 Adjustment
 Mileage

View on Assignment Record

3. Select the + to add a new adjustment
4. Fill out the following information:

manage adjustment

Adjustment: Mileage

Default Pay Rate: \$0.5000

Default Bill Rate: \$0.6000

Pay Code: Reg

0 

 Save

- Select the **Adjustment Type** from the drop down (if you do not see the option you are looking for, an [admin](#) can add it for you)
 - Enter the default **pay rate** (if this is a payable adjustment)
 - Enter the default **bill rate** (if this adjustment is billable)
 - Select the **Pay Code** that this adjustment will appear on (ex. Reg vs. Holiday vs. Bonus)
 - You can only apply one adjustment type to a pay code, as they cannot overlap in the system.
 - In the example above, the mileage adjustment applies only when paying regular pay (not on bonuses or holiday pay) & is paid @ \$0.50 per mile and billed back to the client @\$0.60
5. Select Save

Grier, Gus
 Cotton Candy, Production Worker
 Assignment ID: 4301407051 Employee ID: 4295038466
 Order ID: 4295091894 Branch: Eagan

No tasks to display for your current fil

tasks appointments

details
 accruals
adjustments
 calls
 commission allocations
 integrations
 messages

assignment adjustments

Drag a column header here to group by that column.

Adjustment	Pay Rate	Bill Rate	Pay Code
Mileage	0.5000	0.6000	Reg

Processing Assignment Adjustments in Time Entry

When timecards are created each week for assignments, payroll processors will need to review and enter information on the assignment adjustments before they will be processed through payroll and billing.

1. Navigate to Pay/Bill > Time Entry (ALT + i if you are a keyboard shortcuts fan)
2. Timecards with assignment adjustments will show adjustment information under the detailed timecard (double click on the transaction)

Has Assg Adj

Has Assg Adj	Status	Customer	Name	Pay Code	RT Hrs	OT Hrs	Bill	Pay	WE Date
		Tess's Auto body	Mayheiw, Molly	Reg	0	0	\$21.68	\$15.00	1/1/2020 12:...
		Stewardship	Peterson, Chris	Reg	0	0	\$21.15	\$13.00	1/5/2020 12:...
		The Citadel	Swanson, Ron	Reg	0	0	\$28.90	\$20.00	1/5/2020 12:...
		Winter Wonder...	Watson, Abby	Reg	0	0	\$40.00	\$25.00	1/5/2020 12:...
		Monsters Inc	Streen, Meryl	Reg2	0	0	\$23.20	\$16.00	1/5/2020 12:...

Detailed Timecard

Pay and Bill Rates Adjustments Overrides Codes

Hourly Salary

daily hours

Regular Hours: 0.00
 Overtime Hours: 0.00
 Double Time Hours: 0.00
 Number of Days: 0

Day 1: 0.00 Day 2: 0.00 Day 3: 0.00 Day 4: 0.00 Day 5: 0.00 Day 6: 0.00 Day 7: 0.00

units

Units: 0.00
 Unit Bill: \$0.00
 Unit Pay: \$0.00

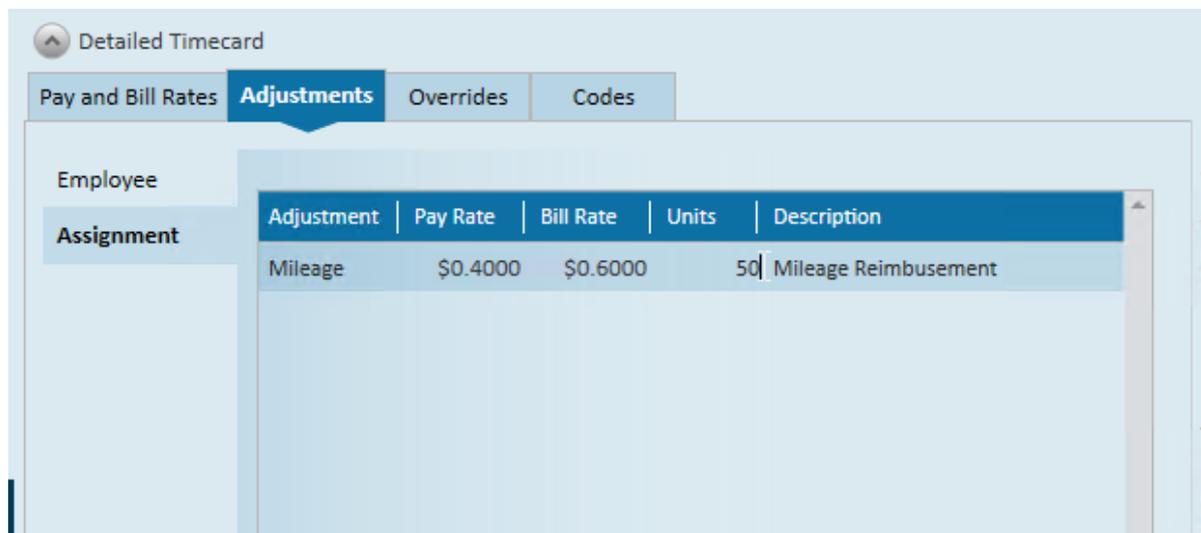
rates

Bill Rate: \$40.00
 OT Bill: \$50.00
 DT Bill: \$70.00
 Pay Rate: \$25.00
 OT Pay: \$37.50
 DT Pay: \$50.00
 Adj Gross: \$0.00
 Adj Net: \$0.00
 OT Plan: PlanSTD

payroll info

WE Bill: 1/5/2020
 WE Date: 1/5/2020
 Work Date:
 Inv Date:
 Pay Code: Regular earnings. H:
 Job Title: 8 hour Nurse
 PO Num:
 Payroll Note:

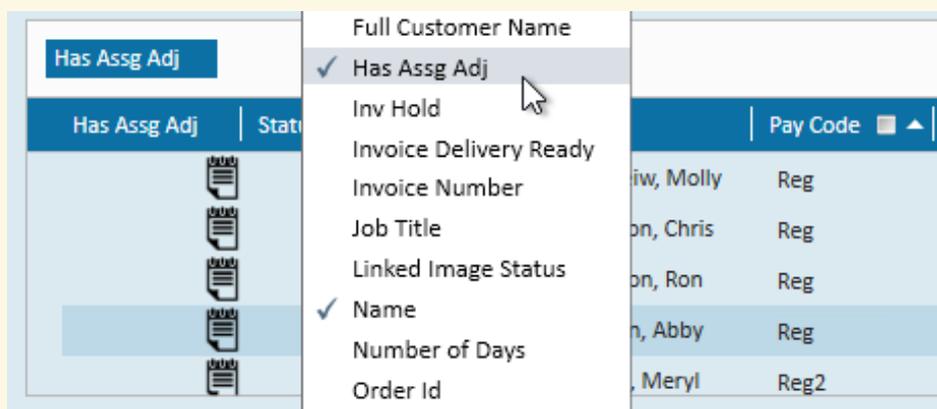
3. Navigate to the Adjustments tab and choose Assignment adjustments
4. If the adjustment applies for this week, you will need to add the number of units:



- For options like mileage, this would be the number of miles
- If this is a flat rate adjustment, you may just need to enter 1 unit to be paid and/or billed at the amounts specified
- You can also update the pay/bill rate if it is different this week. Just remember that it will go back to the previous rate next week because that is how it is entered on the assignment.

5. Save & proof and pay/invoice as normal

Note If you are entering assignment adjustment information often and need help identifying which transactions have adjustments you can add the "Has Assg Adj" column(right click on the column headers in Time Entry). This will provide a visual indicator to show this timecard has an assignment adjustment that may be applicable.



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