

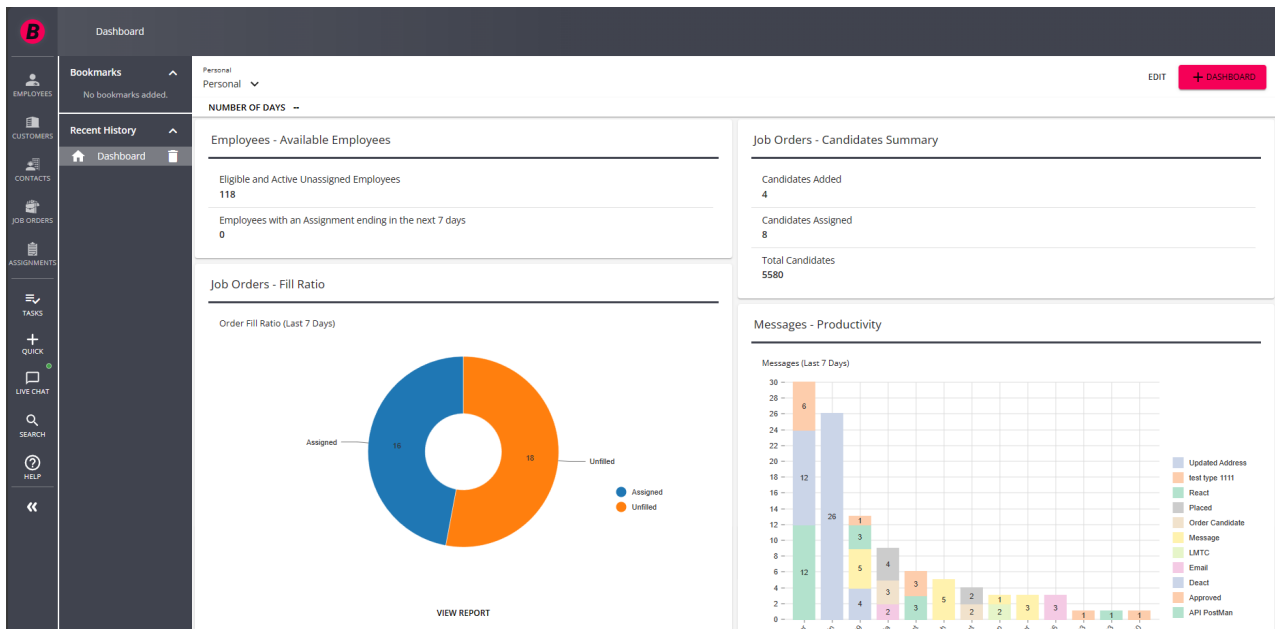
Beyond - Assignment Frequently Asked Questions

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This article will review some of the most common questions about assignment records in Beyond.

What is Beyond?

TempWorks Beyond™ is a comprehensive mobile applicant tracking system (ATS) and customer relationship management (CRM) browser-based solution offered for the staffing industry. It allows you to access your applicant & customer records from any device connected to the internet and utilizing a web browser (for more information on logging in see [Beyond: How to Log In](#)).



FAQ List:

1. [What is an Assignment Record?](#)
2. [How Do I Create an Assignment Record?](#)
3. [How Do I Keep Track of Candidates?](#)
4. [What are Assignment Restrictions?](#)
5. [Can I Update Rates on Assignments?](#)
6. [How Do Assignment Records Impact Payroll?](#)
7. [Can I Track Additional Information on Assignment Records?](#)
8. [How Do I End an Assignment?](#)
9. [Can I End Multiple Assignments at Once?](#)
10. [What is the Other Contact Methods Card and How Does it Work?](#)

Q: What is an Assignment Record?

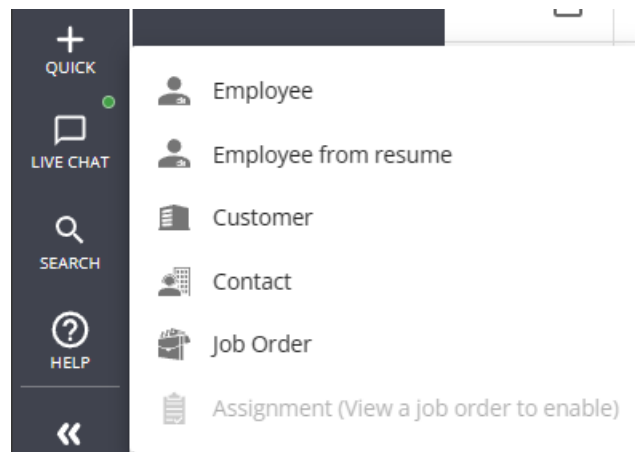
Answer: The assignment record shows where an employee has worked in the past or is currently working. Assignment records tie together employee, customer, and order information. Assignment records are for individual employees allowing you to further customize information including pay and bill rates.

Check out [Beyond - Record Types](#) for more information on what records are available in Beyond.

Q: How Do I Create an Assignment?

Answer: There are many different ways to create an assignment record in Beyond. One of the easiest ways is to view an order that you need to fill and then find the employee you want to assign.

Select the "+ Quick" icon at the left, then select '**Assignment**':



This will try to assign the last order you looked at with the current employee you are viewing. Keep in mind the assignment option will be grayed out when no orders have been viewed recently.

Check out [Beyond - How to Create an Assignment](#) for more detailed instructions on all the options you have to create assignment records.

Note Any record added into Enterprise will be automatically added into Beyond and visa versa.

Q: How Can I Keep Track of Candidates?

Answer: Trying to put together a list of your potential candidates? Need employees to go through an interview process with the customer? You can keep track of candidates on the candidates tab of an order:

VISIFILE DETAILS CANDIDATES DOCUMENTS MESSAGES CUSTOM DATA						
Filter by status...						
Search returned 3 results						+
Employee ↑	Status	Primary Phone	Interest Code Match %	Resume		
Christopher Robin BuzzOffer on May 22, 2020	BuzzOffer	(456) 789-1250	33%		⋮	
Dantalion Haagenti Candidate on Dec 13, 2019	Candidate	(984) 561-2022	0%		⋮	
Amy Adams Interview1 on Jun 11, 2020	Interview1	(234) 432-3456	67%		⋮	

Want to learn more? Check out [Beyond - The Candidates Tab](#).

Q: What are Assignment Restrictions?

Answer: Assignment restrictions are a way to alert your recruiters to potential problems when assigning an employee. This can include hard stops, like when an employee record is missing a SSN, or a soft stop, when an employee is missing a required interest code.

Soft stop assignment restrictions can be seen as warning that can be approved while hard stops need to be fixed before an assignment record can be made.

Add New Assignment - Assignment Restrictions

- Enter Assignment Information
 2 Assignment Restrictions

One or more restrictions cannot be approved. Please correct the records as indicated below or select a different combination of employee and job order.

Assignment Restrictions

- Cannot approve:** Employee status is unwashed, Please verify employee details and update washed status.
[Adams, Tracy](#)
- The employee is missing the following interest code: 7 Panel Drug Tested
[Adams, Tracy](#)
- Employee I9 has not been received.
[Adams, Tracy](#)
- Employee is missing ACA Hire Date
[Adams, Tracy](#)

To learn more, check out [Beyond - Assignment Restrictions](#).

Q: How Can I Update Rates on Assignments?

Answer: You can update any pay or bill rate directly on the assignment under the details tab. However, if you have an order with multiple assignments that now have wrong pay rates, you may want to update rates for multiple assignments at once.

Search for the orders or assignments you want to update rates for and use the check boxes to select the orders or assignments you want to update.

Search returned 78 results
Active, Customer

3 selected assignments [Clear Selection](#)

<input type="checkbox"/>	Assignment Id ↑	Employee Name ↑	Customer	Department	Job Title	Bill Rate
<input checked="" type="checkbox"/>	4302412576	Abootorabi, Deborah	Old Ed's Soda Shop	Primary	Customer Service Rep.	24
<input type="checkbox"/>	4302377233	Acosta, Marlin	Old Ed's Soda Shop	Primary	Customer Service Rep.	24
<input checked="" type="checkbox"/>	4302377287	Adams, Amy	Old Ed's Soda Shop	Primary	Customer Service Rep.	24

Use the action menu to choose Mass Update Rates and follow the prompts to update rates.

Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method

Increase Rates By Value

- Increase Rates By Value
- Increase Rates By Percentage
- Change Rates To Value

Change Multiplier Code To

Do not change Multiplier Code


CANCEL NEXT >

Check out [Beyond - How to Mass Update Rates](#) for more information.

Q: How Do Assignment Records Impact Payroll?

Answer: Assignment Records have a direct impact on both payroll and invoicing. Each assignment record holds important back office information including pay and bill rates, work sites, worker comp codes etc. that will all flow onto the timecard each week the employee is paid.

You can think of the assignment record as a source of truth for payroll and invoicing processes so it's extremely important that this information is accurate.




^ Financials 	
Multiplier Code 1.5	Overtime Factor 1.5000
Bill Rate 37.50	Pay Rate 25.00
Salary Bill Rate 0.00	Salary Pay Rate 0.00
Unit Bill Rate 0.0000	Unit Pay Rate 0.0000
Overtime Bill Rate 56.25	Overtime Pay Rate 37.50
Doubletime Bill Rate 75.00	Doubletime Pay Rate 50.00
Worker Comp Code Tx8742	W-2 Yes
Employer High Tech & Staffing Services, Inc	Vendor High Tech & Staffing Services, Inc
Burden --	PO Number 12983
Payroll Note --	Other Agency Pay 0.00
Select Rate Sheet >	

To make things easier on you and your team, we recommend considering the following:

- Utilize [Customer Defaults](#) to limit and automatically populate options like worker comp codes, multiplier codes, etc.
- Focus on populating the [order](#) with as much information as you can because the pay/bill rates, worker comp codes, worksite, etc. set here will populate on to each assignment record
- Consider making a checklist for those on your sales or recruiting staff that take order requests to make sure they fill out all the necessary information every time. You could also look at having a default form customers use to make the order requests to make sure they are providing all the information.

Q: Can I Track Additional Information on Assignment Records?

Answer: Yes. Whether you are looking to track uniform size, badge Id, or an additional date, you can utilize the custom data tab to keep track of all your miscellaneous items.

VISIFILE	DETAILS	MESSAGES	CUSTOM DATA
^ Custom Data			
1st	False		
2nd	False		
3rd	False		
acct code	--		

Custom data needs to first be set up by your admin in Enterprise. Check out [Enterprise - How to Setup and Manage Custom Data](#) for more information.

Check out [Beyond - Custom Data](#) for more information on where you can find custom data options in Beyond.

Q: How Do I End an Assignment?

Answer: When an employee has finished an assignment, it's important to end the assignment to keep your records up to date and ensure your employee is showing up as unassigned in employee searches.

To end an assignment, you need to enter the End Date and set the Status to anything other than open:

The screenshot shows two sections: 'Details' and 'Job Information'. In the 'Details' section, the 'Status' field is set to 'Open' and is highlighted with a red box. In the 'Job Information' section, the 'End Date' field is currently empty and is also highlighted with a red box. Other fields include Employee ID (13111), Customer (Old Ed's Soda Shop - Primary), and Start Date (5/18/2020).

Check out [Beyond - How to End an Assignment](#) for more information.

Q: Can I End Multiple Assignments at Once?

Answer: Yes! If you have lots of assignments ending at the same time, you can update them all at the same time using an order or assignment search to gather them and choosing the option to Mass Update Assignments:

The screenshot shows a search interface with 'BASIC' and 'ADVANCED' tabs. The search criteria include 'Customer Name' set to '100' and 'Status' set to 'Active'. A 'SEARCH' button is visible. Below the search bar, it says 'Search returned 149 results' and '20 selected items'. A dropdown menu is open, showing options: 'Mass Update Rates', 'Mass Update Assignments' (which is highlighted with a mouse cursor), and 'Assign a New Workflow...'. Below the menu, a table of assignment results is visible, with the first two rows selected (checked).

	Last Name	First Name	Customer Name	Assignment Id	Employee Id	Status
<input checked="" type="checkbox"/>			100			Active
<input checked="" type="checkbox"/>	4302412691	Stout	Jerry	100 Acre Woods, Inc.	Primary	Laborer
<input checked="" type="checkbox"/>	4302412742	Peterson	Fran	100 Acre Woods, Inc.	Primary	Laborer

Check out [Beyond - Mass Update Assignments](#) for more information.

Q: What is the Other Contact Methods Card and How Does it Work?

Answer: The "Other Contact Methods" card is located on the details tab of the assignment record and will display relevant phone numbers and email addresses based on the order.



The screenshot shows a user interface with three expandable sections. The first section, 'Employee Contact Methods', is expanded and shows an email address 'ta@somedomain.com' with an 'Email' label and a copy icon. The second section, 'Other Contact Methods', is also expanded and shows the name 'Amy Andrew' and a phone number '(456) 891-5362' with a copy icon. The third section, 'Financials', is collapsed and shows a 'Multiplier Code' field with the value 'None' and a red edit icon.

This is populated based on the contact information on the customer record and the contact roles selected on the order. To learn more, check out [Beyond - Assignment Details](#)

Related Articles