

Beyond - How to Create and Manage Direct Hire Orders

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What are Direct Hire Orders?

Direct Hire job orders allow you to track customer requests for employees that they will directly hire on for their business. While these orders are similar to other order types, they are customized to help with direct hire billing and additional candidate information. This article reviews the process of creating direct hire orders, managing the information, and billing successful assignments.

This article covers the following:

1. [Setting Up Permissions](#)
2. [Creating a Direct Hire Order](#)
3. [Direct Hire Differences](#)
4. [Finding Candidates](#)
5. [Direct Hire Assignments](#)
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Setting Up Permissions

For users utilizing Default Security Groups, no additional permissions are required to access the Direct Hire functionality in Beyond.

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Read/Write access to the "Direct Hire" fields and forms within Customer/Job Order/Assignment, along with Access to the necessary pages within Customer/Job Order/Assignment to the Security Groups that require the functionality.

The required fields and forms can be found by searching "Direct Hire" when creating/editing a Security Group with Advanced Permissions:

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>
Direct Hire	X	
Customer		<input checked="" type="checkbox"/> Access
Visifile Page		<input checked="" type="checkbox"/> Access
Job Order Defaults Form		<input checked="" type="checkbox"/> Access
Direct Hire Fee Percentage Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Details		
Sales & Service Page		<input checked="" type="checkbox"/> Access
Job Order Defaults Form		<input checked="" type="checkbox"/> Access
Direct Hire Fee Percentage Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Job Order		<input checked="" type="checkbox"/> Access

Additionally, the Direct Hire Placement Fee form is controlled by Advanced Permissions by searching for "Placement Fee":

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>
placement fee	X	
Assignment		<input checked="" type="checkbox"/> Access
Visifile Page		<input checked="" type="checkbox"/> Access
Deactivate Placement Fees Form		<input checked="" type="checkbox"/> Access
Details		
Details Page		<input checked="" type="checkbox"/> Access
Add Or Edit Assignment Placement Fee Form		<input checked="" type="checkbox"/> Access
Notes Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Weekend Bill Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
...		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

Finally, the Candidate Preferences and Position Summary cards have been added to Beyond and can also be controlled by Advanced Permissions by searching for "Candidate Preferences" and "Position Summary" respectively:

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>
Candidate Pr	X	
Job Order		<input checked="" type="checkbox"/> Access
Visifile Page		<input checked="" type="checkbox"/> Access
Candidate Preferences Form		<input checked="" type="checkbox"/> Access
Required Skills Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Additional Skills Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Ideal Candidate Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Top 3 Knock-out Factors Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Three most important attributes for success Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Details		

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>	
Position Su	X		
Job Order		<input checked="" type="checkbox"/>	Access
Visifile Page		<input checked="" type="checkbox"/>	Access
Position Summary Form		<input checked="" type="checkbox"/>	Access
Primary Responsibility Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Pay Range Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Interviewed Candidates Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Reason For Open Position Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Noteworthy Benefits Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Using Manager and Process Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Creating a Direct Hire Order

1. Navigate to the customer record, select the Quick Add option at the top right, and select "Job Order".
2. Select the "Job Order Type" of "Direct Hire":

Add New Job Order

* Customer
123 Nursing - Primary

* Job Order Type
Direct Hire

SAVE AS DRAFT CANCEL **SUBMIT**

3. Select "Submit" to create the job order:

Add New Job Order

* Customer
123 Nursing - Primary

* Job Order Type
Direct Hire

SAVE AS DRAFT CANCEL **SUBMIT**

Direct Hire Differences

Financials Card

From the details page, users will notice that general layout is the same as that of a temp order other than the information within the "Financials" card being catered to a Direct Hire job order:

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS

- Customer Information
- Job Information
- Job Board Options
- Time Clock
- Financials

Fee Percentage	Salary
--	0.00
Fee	
0.00	
- Contact Roles
- Interest Codes
- Other Information

Within the "Financials" card, you can enter a salary, fee percentage, or straight fee for the placement.

Note Fee percentages can be setup as a default from the customer record within Customer > Details > Sales and Service > Job Order Defaults > Direct Hire Fee Percentage:

VISIFILE DETAILS DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

- Sales Information
- Sales Pipeline
- Job Order Defaults

PO Number	Supervisor
12983	Isabella Heuer
Cost Center	Burden
--	--
Sub Entity / Dept	Location
--	--
Check Delivery	Direct Hire Fee Percentage
--	10.00%
Customer Extra 1	Customer Extra 2
--	--
Customer Extra 3	
--	

If the fee percentage was setup as a default from the customer record, it will automatically populate within newly created job orders.

Once the salary has been entered into the "Financials" card, users may place a fee directly into the field or utilize the fee percentage area to calculate the total fee.

Example: If you enter a salary of \$50,000 and a fee percentage of 10%, the fee field will automatically calculate a fee of \$5,000:

Direct Hire Financials

Fee Percentage	Salary
10.000000	50000.00
Fee	
5000.00	

CANCEL SUBMIT

Note If you do not use the fee percentage to calculate the fee, leave this field empty.

Position Summary and Candidate Preferences

Enter specific information pertaining to the job order within the "Position Summary" and "Candidate Preferences" cards located within Job Order > Details > Position Notes. Fields such as pay range, reasons for the open position, additional skills, etc. can be added:

The screenshot shows a web interface with a navigation bar at the top containing: VISIFILE, DETAILS (selected), CANDIDATES, CANDIDATE MATCHING, DOCUMENTS, MESSAGES, CUSTOM DATA, and ASSIGNMENTS. Below the navigation bar are two main sections:

- Position Summary:** A table with two columns. The first column contains 'Primary Responsibility' (Nursing), 'Interviewed Candidates' (---), and 'Noteworthy Benefits' (Healthcare Benefits). The second column contains 'Pay Range' (30-45), 'Reason For Open Position' (Staffing Shortage), and 'Hiring Manager and Process' (---). A red pencil icon is in the top right corner.
- Candidate Preferences:** A table with two columns. The first column contains 'Required Skills' (Registered Nurse), 'Ideal Candidate' (---), and 'Three most important attributes for success' (---). The second column contains 'Additional Skills' (Communication, Responsible, On-Time) and 'Top 3 Knock-out Factors' (---). A red pencil icon is in the top right corner.

Once the details form is completed users may start searching for potential candidates.

Finding Candidates

The "Candidates" tab on the job order can help you keep track of potential candidates and where they are in your hiring process.

To build a candidate call sheet for the position, navigate to the "Candidates" tab, select "+", and enter the search criteria:

The screenshot shows the 'CANDIDATES' tab selected in the navigation bar. A modal window titled 'Add New Candidate - Enter Candidate Information' is open. It has two steps: '1 Enter Candidate Information' and '2 Assignment Restrictions'. Below the steps, it says 'Add Candidates To Job Order:' followed by a folder icon, '123 Nursing - Primary', and 'Unknown: 0 of 1 positions filled'. Below that, it says 'Please use the search to find candidates to add:'. There is a '* Required' label. The search form has four fields: 'Last Name', 'First Name', 'Govt ID', and 'Id'. A red search icon is on the right. At the bottom right, there are 'CANCEL' and 'NEXT >' buttons.

Note For more information on candidates, please see the article titled [Beyond - How to Track Candidates on an Order](#).

Direct Hire Assignments

You can assign an individual to a Direct Hire Order the same way you make assignments for any other order type.

Note For more information on creating assignments, please see the article titled [Beyond - How to Create an Assignment Record](#).

Once you have assigned an employee to a direct hire order, navigate to the individual assignment record to verify the start date and fee to ensure invoicing is processed accurately.

Adding a Placement Fee

Users will need to verify/add the placement fee.

To do this, navigate to Assignment > Details > Financials Card and select the "+" icon to the right to open the "Add Placement Fee" window:

The screenshot shows a navigation bar with 'VISIFILE', 'DETAILS' (selected), 'MESSAGES', and 'CUSTOM DATA'. Below are several expandable cards: 'Details', 'Job Information', 'Employee Contact Methods', 'Other Contact Methods', and 'Financials'. The 'Financials' card is expanded, showing a table with the following data:

Fee Percentage	Salary
10%	50,000.00
Fee	PO Number
5,000.00	--

At the bottom of the 'Financials' card, there is a red '+' icon and the text 'No Placement Fees'.

The rate will pull in automatically based on what was calculated originally from the order, however, if negotiations have occurred and the fee/percentage has changed, the new fee can be entered into the rate field:

The 'Add Placement Fee' dialog box contains the following fields and options:

- * Weekend Bill
- Rate: 5000.00 (highlighted with a red box)
- Notes
- Is Active
- CANCEL SUBMIT

Enter the Weekend Bill date of the fee. This date tells the system when to create the transaction:

Note This date should reflect a date that falls within the weekend bill date of when the customer should be invoiced.

Add Placement Fee

* Weekend Bill	Rate
8/28/2022	5000.00

Notes
This is a Direct Hire Placement Fee

Is Active

CANCEL SUBMIT

Additionally, enter any applicable notes and once finished, select "Submit" to add the Placement Fee.

If you bill the customer multiple times for the same placement, this can be accounted for by adding multiple placement fees.

For example, suppose the customer agrees to pay \$5,000 the first week, and \$500 the second week. Select the "+" icon, enter the additional placement fee with the new date and select "Submit" to save:

Add Placement Fee

* Weekend Bill	Rate
9/4/2022	500.00

Notes
This is an additional Direct Hire Placement Fee.

Is Active

CANCEL SUBMIT

Once the Placement Fees have been added, they will appear within the aforementioned "Financials" card:

VISIFILE DETAILS MESSAGES CUSTOM DATA

Employee Contact Methods

Other Contact Methods

Financials

Fee Percentage: 10% Salary: 50,000.00

Fee: 5,000.00 PO Number: --

HIDE PLACEMENT FEES

Active	Rate	Weekend Bill	Note
<input checked="" type="checkbox"/>	500.00	9/25/2022	Direct Hire Placement Fee
<input checked="" type="checkbox"/>	500.00	1/1/2023	Direct Hire Placement Fee

HIDE PLACEMENT FEES

Assignment End Dates and Deactivating Direct Hire Fees

In the event an assignment has an end date that is set before Direct Hire Fees are to be applied, you will see the following message when setting the assignment end date:

Job Information - Job Information

1 Job Information 2 Deactivate Placement Fees

* Job Title: Unknown Business Code: [Dropdown]

* Original Start Date: 8/23/2022 Expected End Date: [Dropdown]

* Start Date: 8/23/2022 End Date: 8/23/2022

This assignment is ending before all Direct Hire fees have been processed. You will be prompted to deactivate the remaining fees upon clicking Submit.

Upon selecting "Next" when updating the end date, you will be prompted to deactivate the Direct Hire Fees that are still considered active:

Job Information - Deactivate Placement Fees

1 Job Information 2 Deactivate Placement Fees

Disclaimer: This assignment is ending before all Direct Hire fees have been processed. Do you want to cancel the remaining fees?

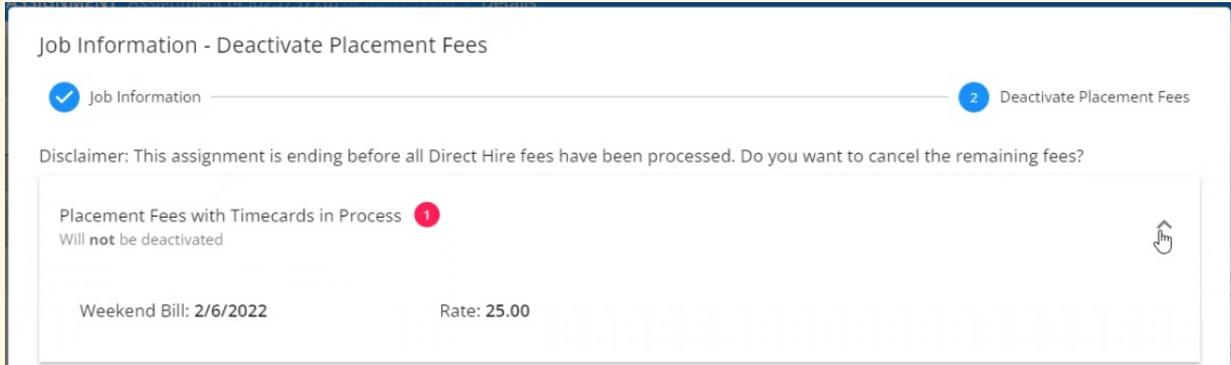
Placement Fees to be deactivated 2

Will be deactivated

Weekend Bill: 8/28/2022	Rate: 5,000.00
Weekend Bill: 9/4/2022	Rate: 500.00

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT & SKIP DEACTIVATION SUBMIT & DEACTIVATE

Note In the event you have a Direct Hire Fee that is part of a timecard that needs to be processed, you will see the following and that Direct Hire Fee will not be deactivated:

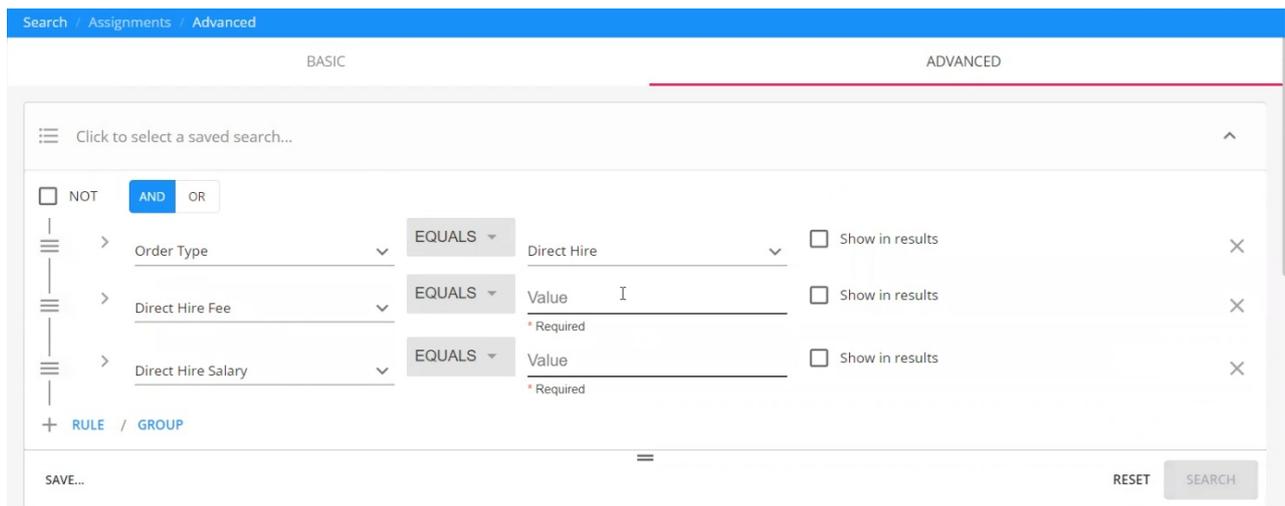


Once the information has been reviewed, you will have the option to either continue and not deactivate the Direct Hire Fees or continue and process to deactivate the Direct Hire Fees that can be deactivated.

Assignment Advanced Search

Users now have the ability to search for assignments using the following parameters:

- Order Type - Direct Hire
- Direct Hire Fee
- Direct Hire Salary



Direct Hire Invoicing

Once the Direct Hire job order and assignment records have been setup, the remainder of the timecard/invoicing

process occurs in Enterprise.

Note For more information on the Direct Hire process in Enterprise, please see the following articles:

- [Enterprise - How to Create and Manage Direct Hire Orders](#)
- [Enterprise - How to Create a Direct Hire Invoice](#)

Related Articles