

Customer Contract 9R1

Contracts are used to house information and set up “rules” that should be applied to each Order that a Customer places.

Contracts can be set up as Blanket Contracts to cover multiple Customers if the same rules apply to each Customer. They can also be set up individually for each level of a Customer.

There are two ways to navigate to the Contract area:

- Customer/Visifile
- Customer/Invoicing/Main Form


From the **Visifile screen**, click on the **Contract button**.

From the **Invoicing/Main Tab**, click on the **See button**.

The screenshot shows the 'Invoicing' tab selected in a navigation bar. Below the navigation bar is a 'Refresh' button. The main content area is divided into several sections:

- Invoicing:** Contains fields for Style (Invoice), InvCnt (3), Col (S), InvEmail, GlobalUniqueID (2D-37A690FEE435), Currency (USD), Collate, EApprv, TimeCardAttach, AllowWebTimeEntry, Consolidate invoicing w/ parent, and an Invoice Adjustments button.
- Group invoices by:** A grid of checkboxes for Dept, Sup, Aldent, SubE, W/E, Br, CC, Site, PO, SkillCode, Div, and DeptAddr.
- Invoicing schedule:** Includes 'Bill customer daily' (checkbox), 'Bill customer nonweekly?' (radio buttons for Yes/No), and a BillCycle dropdown.
- Contract:** Features an LkpContract dropdown menu with a 'See' button highlighted by a red circle, and a Contract text field containing 'Crom'.
- Select fields to add to the invoice line item detail:** A table with columns 'Invoice Line Item Field' and 'Input Mask'.

This will open the Contract form of TempWorks.

 This area houses all of the contracts, look up contracts as needed.

To Create a New Contract

Click on the **NRS button**.



This will prompt you to create a new record within the Contract area.

Contract Add Quick

ContractID:

ContractID:

ContractStatus:

Start Date: EndDate:

Contract Effective Date:

Contract Type:

Ok Cancel

ContractIdent

Indicate the Identifying name of this Contract.

ContractStatus

Choices are Active or Inactive.

Start/End Dates

Enter the Start and End Dates of this Contract.

EffectiveDate

Indicate the date this Contract goes into Effect.

ContractType

Select the Type of Contract.

Click OK.

Visifile Form

ContractID Lkp: Contract # Lkp: View all

146 Builders Supply 146 Builders Su

Visifile Defaults JobSetup RequireDocs Other Directory Switchboard

ContractIdent: 146

ContractID: Builders Supply

ContractStatus: A

Start Date: 10/01/04 EndDate: 09/30/05

Contract Effective Date: 10/01/04

Contract Type: national

Government Contract: Prevailing Wage: Order Flag:

LiveDate:

Time Card To Use:

Rate Review Date:

Contract Version: 1.0

Special Benefits:

Insurance Requirements:

Indemnification:

Contract Description:

Reporting Requirements:

Conversion Agreement Details:


General Note:

IsPeo:

Follow the tab order and enter information into each field as it pertains to the field title.

Contract ID

Type whatever you wish to name the contract into this field.

 You will want to make sure that the contract name is easily identifiable for when associating with customers.

Contract Status

Indicate the status of this contract (Active, Inactive, etc.).

Contract Effective Date

Indicate the date this contract is effective.

Contract Type

Indicate the type of contract (Standard, National Account, etc.).


Government Contract

If this is a Government contract, select by clicking the checkbox.

Prevailing Wage

If this is a Government contract and prevailing wages must be paid, select by clicking Prevailing Wage and the Order Flag checkboxes.

OrderFlag

 By clicking the checkbox for this field, a short cut button will be created and displayed within the Order Details Sub Tab for any orders placed for this Contract.

Live Date

Indicate the date which this Contract is Live.

TimeCard to Use

Designate the type of timecards this contract requires assigned Employees to use by clicking the down arrow and selecting from the options that appear on the drop down list.

Rate Review Date

Input the date that the contract is up for rate negotiations and review.

Contract Version

Indicate the version of TempWorks that the contract is valid for.

Special Benefits

Within this field, input any information related to benefits.

Insurance Requirements

Enter any information related to insurance requirements.

Indemnification

Site reimbursement guidelines for liability at the Customer Site.

Contract Description

Enter any Description of this Contract.

Reporting Requirements

Within this field, input the specific information for the reporting requirements for the Employees assigned to this Customer.

Conversion Agreement Details

Conversion agreements for assigned Employees should be entered here.

General Note

Within this field, input any additional information regarding the Contract.

Is PEO

Click checkbox to enter a check if this is a PEO Customer.

Defaults Form

The screenshot shows a software interface with a top navigation bar containing tabs: Visifile, Defaults, JobSetup, RequireDocs, Other, Directory, and Switchboard. The 'Defaults' tab is active. Below the navigation bar are four data entry sections:


- Default Multiplier Codes:** A table with columns 'Multiplier code' and 'Default code'. The first row shows '1.5' and an unchecked checkbox. A 'See Multiplier Code' button is located above the table. Record navigation shows '1 of 1'.
- Contract Services:** A table with columns 'ServiceCode', 'Billable?', and 'Bill Rate'. The first row shows '5 Panel Drug Screen', an unchecked checkbox, and '\$0.00'. Record navigation shows '1 of 1'.
- Default Shifts:** A table with columns 'ShiftName', 'StartTime', 'EndTime', and '# Hours'. Rows include 'Day' (7:00-14:00, 7 hours), 'Evening' (15:00-22:00, 7 hours), and 'GraveYard' (22:00-6:00, 8 hours). Record navigation shows '4 of 4'.
- Contract Accruals:** A table with column 'AccrualID'. The first row shows 'Admin Vac'. Record navigation shows '1 of 1'.

Multiplier Codes

This is a close-up of the 'Default Multiplier Codes' section from the screenshot above. It shows a table with two columns: 'Multiplier code' and 'Default code'. The first row has '1.5' in the first column and an unchecked checkbox in the second. The second row has an asterisk '*' in the first column and a checked checkbox in the second. A 'See Multiplier Code' button is at the top right. Record navigation at the bottom shows '1 of 1'.

If applicable, use the Multiplier area to select agreed upon Multipliers, which will default to any Order placed for this Contract.

Select the Multiplier Code and indicate whether or not this Multiplier should default automatically to each order (If not, the multiplier must be presented as an option within the Order).

 If the Multiplier you are looking for is not included in the list, create a new Multiplier Code.

Creating a Multiplier

To create a multiplier that can be associated with a specific Contract, click on the **See Multiplier Codes Button** on the **Defaults form**.

The **Markup form** will open.

Multiplier Look-up: [Dropdown]

Multiplier Code: **Swing Diff Pay:**

RT Markup: **Swing Diff Bill:**

OT Markup*: x **Grave Diff Pay:**

DT Markup*: x **Grave Diff Bill:**

Apply Bill: (Calculate the overtime bill rates based on the regular bill rates)

Apply Pay: (Calculate the bill rates based on the pay rates)

Note:

*** OTRate and DTRate Markup Calculations:**

BillRate = [PayRate] x [RTMarkup]
 OTBillRate = (([PayRate] or [BillRate]) x [OTMultiplier]) x [OTMarkup]
 DTBillRate = (([PayRate] or [BillRate]) x [DTMultiplier]) x [DTMarkup]

Ex.
 PayRate = \$10.00 Calculated Values:
 RTMarkup = 1.4 BillRate = \$10.00 x 1.4 = \$14.00
 OTMarkup = 1.3 OTBillRate = (\$10.00 x 1.5) x 1.3 = \$19.50
 OTMultiplier = 1.5 DTBillRate = (\$10.00 x 2.0) x 1.2 = \$24.00
 DTMarkup = 1.2
 DTMultiplier = 2.0

Sample Calculations:

PayRate:
BillRate:
OBillRate:
DBillRate:

Calculate

Click the **NRS button** to create a new Multiplier.

Follow the tab order and enter the information into each field as it pertains to the title of each field.

Multiplier Code

Input the name of the Multiplier that you are creating.



The name should easily identifiable when associating Customers and Orders with the multiplier.

RTMarkup

Input the regular time markup rate that will be applied to any Order associated with this multiplier.

OTMarkup

Input the over-time markup rate that will be applied to any Order associated with this multiplier.

DTMarkup

Input the double-time markup rate that will be applied to any Order associated with this multiplier.

Apply Bill

If the multiplier code should be applied to the Bill Rate, click this checkbox.

Apply Pay

If the multiplier code should be applied to the Pay Rate, click this checkbox.

SwingDiffPay

Input the swing differential that any Employee working the swing shift will receive while working on an assignment for this Customer.

SwingDiffBill

Input the swing differential bill rate that will be charged to this Customer for any assignment.

GraveDiffPay

Input the grave differential that any Employee working the grave shift will receive while working on assignment for this Customer.

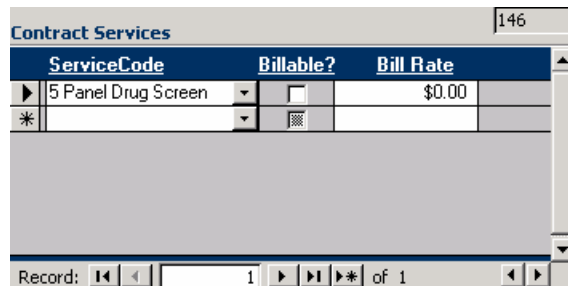
GraveDiffBill

Input the grave differential bill rate that will be charged to the Customer for any Employee who is working the grave shift.

Note

Input any additional information related to the multiplier.

When all fields are complete, click the **Close Form button** in the top left corner of the screen.

Services

ServiceCode	Billable?	Bill Rate
▶ 5 Panel Drug Screen	<input type="checkbox"/>	\$0.00
* []	<input type="checkbox"/>	

Record: 1 of 1

Within this tab, you can assign the Contract specific Services required.

Service Code


Use the dropdown arrow to select the Services required for all Orders for this Contract.

Billable?

Indicate by clicking in the box if this Service is billable back to the Customer.

Bill Rate

If this Service is billable, indicate the bill rate for this Service.

 When an Order is entered into TempWorks for any Customer affiliated with this Contract, the Services entered here will automatically default onto the Order.


Shifts

Default Shifts				
ShiftName	StartTime	EndTime	# Hours	Refresh
Day	7:00	14:00	7	
Evening	15:00	22:00	7	
GraveYard	22:00	6:00	8	

Record: 4 of 4

Within this tab specify the Shifts this Customer uses.

Shift Name

 Indicate the name of the Shift. This should be whatever the Customer calls it so that when placing an order for the customer there won't be any confusion.

Shift Start

Indicate the time this Shift usually begins.

Shift End

Indicate the time this Shift usually ends.

Accruals

Contract Accruals	
AccrualID	
Admin Vac	
*	

Record: 1 of 1

Use the **Accrual Tab** to indicate a **Vacation Package** specific to the Contract you are creating. The Vacation Package selected here will cover any Employee assigned to a Customer affiliated with this Contract.


JobSetup Form

Visifile											
Defaults			JobSetup			RequireDocs		Other		Directory	
Title Code	Description	Shift	DefaultMultiplier	TitleCode	Payrate	Billrate	OBillrate	DBillrate			
Forklift		Day	1.5	B015	\$0.00	\$0.00	\$0.00	\$0.00			
Forklift		Evening		B015	\$16.00	\$33.00					
Forklift		GraveY.		B015	\$18.00	\$37.00					

Within the JobSetup Form; Job Titles, shifts, multiplier codes and pay and bill rates can be set up to default onto each Order placed for any Customer affiliated with this Contract.


Title Code Description

Select the Job Title.

 The Job Title can be any Job Title the Customer uses.


Shift

Select the Shift for which that Job Title will be working.

 If this Job Title will be working more than one shift, enter a row for each Shift as shown above.

Default Multiplier

If there is an agreed upon Multiplier for this Job, use the drop down arrow to choose that Multiplier.


 This field can be left blank if there is no agreed upon default Multiplier for this Job Title.

Title Code

The Title Code will automatically be generated when entering the Title Code Description.


Pay Rate

Enter the Pay Rate (if there is an agreed upon Pay Rate).

 This field can be left at \$0.00 if there is no agreed upon Pay Rate.

Bill Rate

Enter the Bill Rate (if there is an agreed upon Bill Rate).

 This field can be left at \$0.00 if there is no agreed upon Bill Rate.

Obill Rate

Enter the Overtime Bill Rate if it is different than the standard 1.5 Overtime markup.

Dbill Rate

Enter the Doubletime Bill Rate if it is different than the standard 2.0 Doubletime markup.

Required Docs Form

Required Contract Documents				Required Document Add				
Category Lkup		Radiology Technician		JobTitle	Scope	DocName	Authority	
Add All Req Documents				ALL	FEDERAL	Copy SS Card	ALL	
				ALL	FEDERAL	Rubella	ALL	
				ALL	STATE	ACLS	ALL	
				Radiology Technici	FEDERAL	ARRT	ALL	
				Radiology Technici	FEDERAL	ARRT Verification	ALL	
				Radiology Technici	FEDERAL	Copy SS Card	ALL	

Act	Scope	Document Name	Authority	Required	StateDep	DateDep	Job Title	Notes
<input checked="" type="checkbox"/>	FEDERAL	Copy SS Card	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALL	
<input checked="" type="checkbox"/>	FEDERAL	Rubella	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALL	
<input checked="" type="checkbox"/>	STATE	ACLS	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALL	
<input checked="" type="checkbox"/>	FEDERAL	ARRT	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Radiology Technician	
<input checked="" type="checkbox"/>	FEDERAL	ARRT Verification	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Radiology Technician	
<input checked="" type="checkbox"/>	FEDERAL	CPR	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Radiology Technician	
<input checked="" type="checkbox"/>	FEDERAL	Criminal Background	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Radiology Technician	

From the **Details** form click on the **HC** button.



This form may be hidden if your company is not conducting Healthcare Placements.

Use this form to indicate all Job Titles being filled for this Customer. For each Job Title there are specific documents required. There may be additional documents that the Customer requests.

For each Document listed requirements and dependencies will be displayed.

If Additional Documents are needed for this Customer:

- Go to the first available line, lookup Document to add.



Required Documents selected here will default onto each Order placed for the Customer affiliated with this Contract. When searching for a specific Job Title, TempWorks can match the Documents required to the Documents possessed by each candidate.

Other Form

Within the Other Form additional information can be tracked.

Contract Miscellaneous

Use this area to track any additional information needed.

See Multiplier Codes

Use this area to add or view Multiplier Codes. (See above for instructions.)

PEO Billing and Employee

PEO Fee Type	Invoice Text	Active	Fee Rate	Is Amount	Is Ratio	Include Fall Off	Max Per Employee
Benefit expense	Benefit expense	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$30.00

Record: 2 of 2 (Filtered)

If the Customer is a PEO enter the necessary Expense items within the PEO form.

PEO Fee Type

Enter the type of fee into this field.

Invoice Text

Enter the text you would like to appear on the Invoice.

Active

Click checkbox to check if this is an active fee.

Fee Rate

Enter the fee amount.

Is Amount

Click to check if this is the actual amount.

Is Ratio

Click to check if this is a ratio of the amount.

MaxPer Employee

Enter the maximum allowable per employee.

Holiday Tab

In Calc Method use P for Premiums (fixed dollar) M for Multipliers (percentage increase - 1.5 is time and half)						
Holiday/Code	Calc Method	Bill	Pay	paycode:	Priority	
▶ Christmas	P	30	25	Hol		
*						

From the **Details form** click on the **Holiday button**.

Use the Holiday Tab to set up various Shift Differentials and Holiday pay requirements.

Holiday/Code

Using the drop down arrow, select the Holiday/Code.

Calc Method

Using the drop down arrow, select the Calculation Method.

P – for Premiums, or fixed dollar amounts.

M – for Multipliers.

Bill

Enter the Bill Rate or Multiplier to be used for the Bill Rate.

Pay

Enter the Pay Rate or Multiplier to be used for the Pay Rate.

Pay Code

Select the Pay Code to be used for this differential (Holiday, vacation, sick, etc.).

Priority

Prioritize the Shift Differentials by rating in the Priority field.

Directory Form

The Directory Form includes various searches which can be conducted on the Contracts.

Show all

Displays all Contracts.

By My RepName

Displays all Contracts for the Rep currently logged into TempWorks.

By RepName

Prompts for a specific Rep Name and displays all Contracts for that Rep.

By ContractName

Prompts for a specific Contract name.

By Shift Name

Prompts for a specific Shift name.

Created Date Range

Prompts for a Date Range in which Contracts were created.