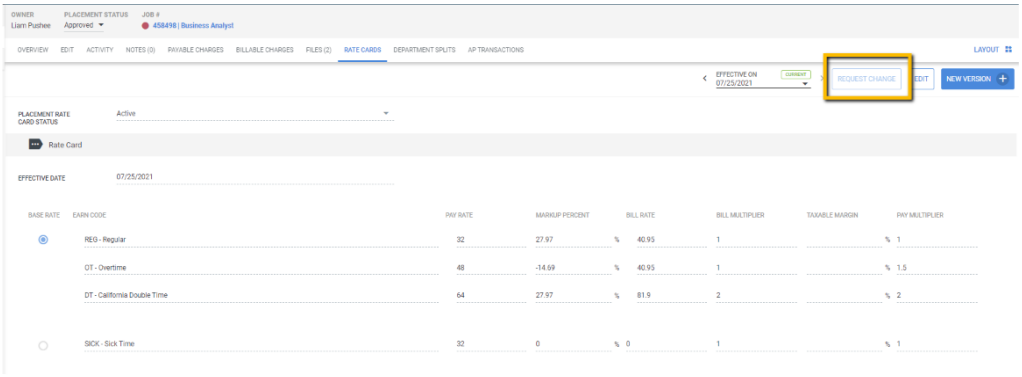
Placement Rate Card Change Request

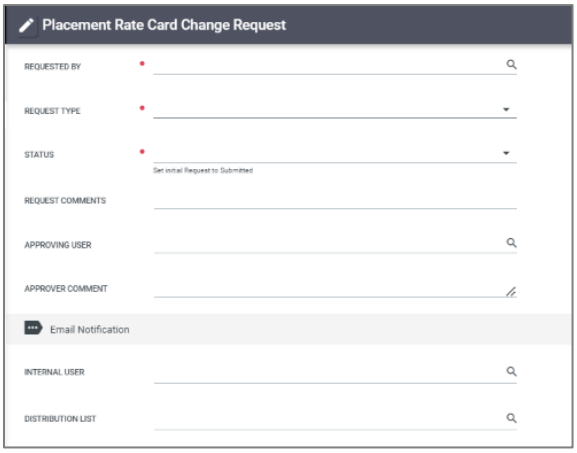
To correct details of an existing Placement Rate Card or to create a new version effective as of a specific date, use **Placement Rate Card Change Request**. The Placement Rate Card must be in **Active** status to create a Change Request and only one Change Request can be in process at a time. If the Placement Rate Card as current and future versions, Placement Rate Card Change Requests are created for each version that needs changes.

Create a Placement Rate Card Change Request

- Navigate to the Placement > Rate Card. Select the Rate Card you wish to change (Current or Future) by selection **Effective On**. Then click **Request Change**



- Enter Request details
  - In Request Type select
    - **Pay/Bill Change** when both the Pay and Bill Rate should change
    - **Pay Change** if the current Bill Rate remains the same and only Pay is updated
    - **Bill Change** when Pay rate remains the same and only the Bill is updated
  - Set **Status** to Submitted
  - Use **Request Comments** to explain/support the change request
  - If necessary, select who should approve the change request
  - Select value(s) in **Internal User** and/or **Distribution List** to send a notifications



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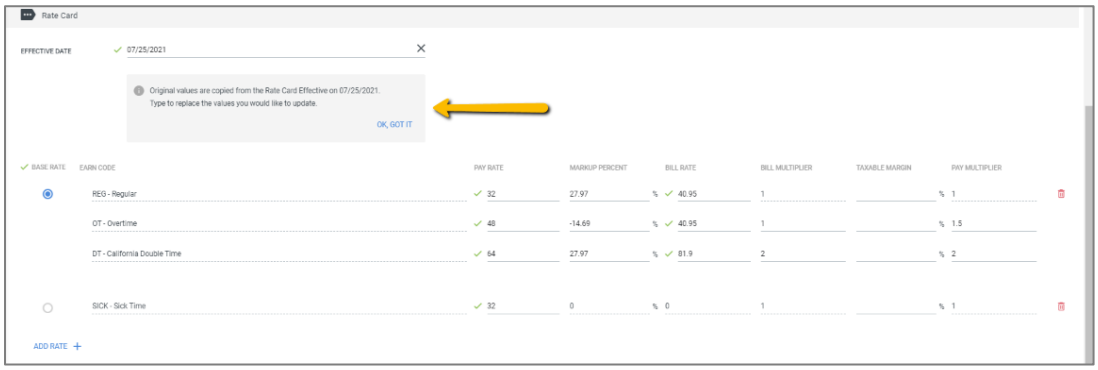
- Make changes to the Rate Card. The details presented are copied from the Rate Card selected, as noted on screen.
    - Enter **Effective Date** of the change. If you need to correct the existing Rate Card, leave the Effective Date as presented
    - For the existing Earn Codes, update which ever values need to change. You may need to update Reg/OT/DT separately depending on what the change is.
        - Know exactly what should change and what remain the same before you start. The Rate Card will calculate fields as you make changes so be very aware of the what the final values should be
            - If **Pay Rate** is updated, the Rate Card will either calculate the Bill Rate using the existing Markup and Multipliers or leave Bill Rate the same and update Markup % and Multipliers. *(Depends on setting)*
                - If the Bill Rate should not change, update to the correct value. Other fields will recalculate
            - If **Markup Percent** is updated, the Bill Rate will calculate
            - If **Bill Rate** is updated, no changes are done to Pay Rate
                - The Markup and perhaps Multipliers will change



- As changes are made, impacted fields are shaded blue.
    - In this example, the Regular **Pay Rate** was updated and the Bill Rate calculated
        - If necessary, update any other field. Fields will recalculate accordingly and be shaded blue
    - To add an additional Earn Code, click **Add Rate** and enter values
- Once the Rate Card values are correct, click **Save**

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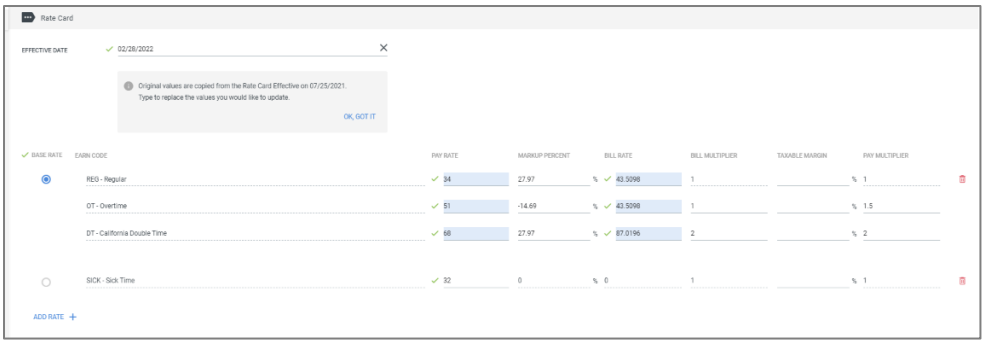
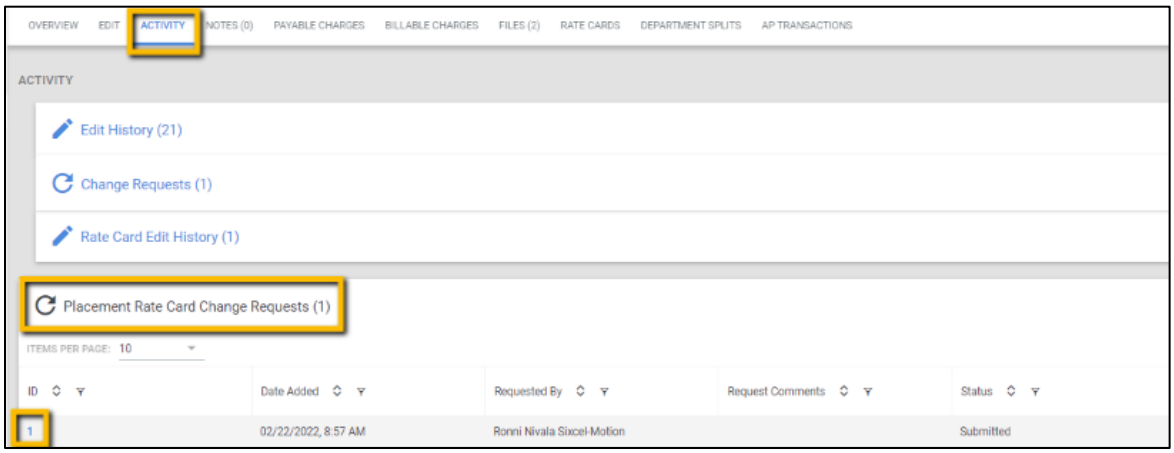


View a Placement Rate Card Change Request

Placement Rate Card Change Requests for a Placement are found under the Placement > **Activity** >Placement Change Requests

- Select **ID** to open the Placement Change Request



- The Placement Change Request Overview screen displays.
  - The Request displays on the left. The Placement Rate Card before and after display on the right.
  - Anyone can view the the Request and changes. Users with entitlements can Edit or Approve the Placement Rate Card Change Request.

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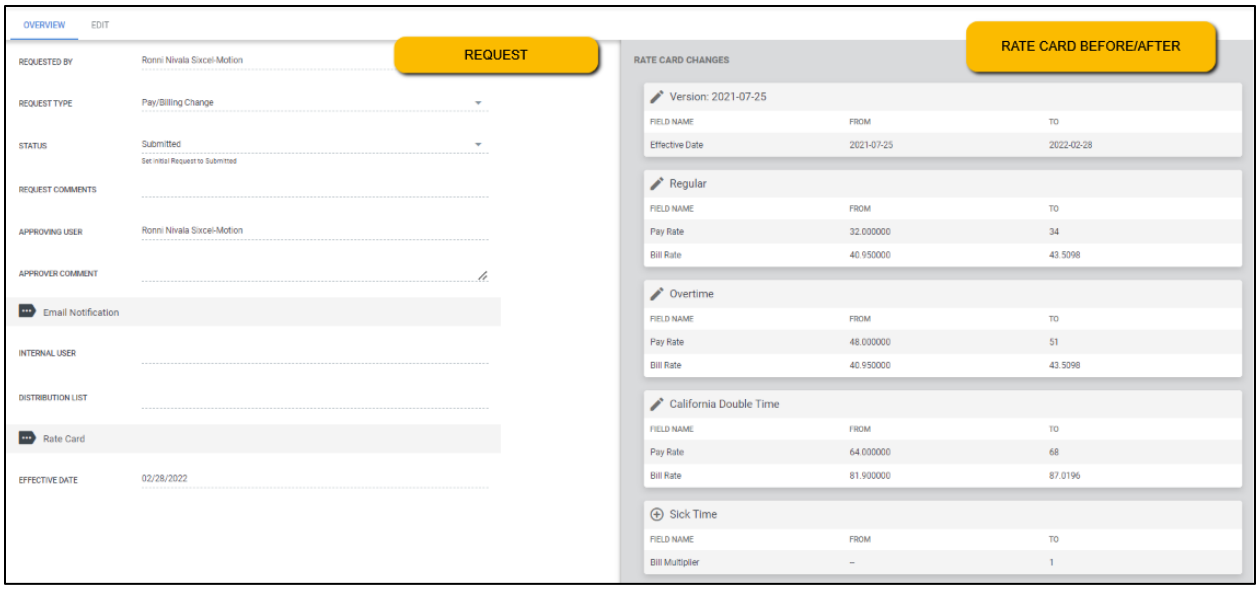
Placement


OVERVIEW
EDIT
REQUEST
REQUESTED BY
Ronni Nivala Sixcel-Motion
REQUEST TYPE
Pay/Billing Change
STATUS
Submitted
Set initial Request to Submitted
REQUEST COMMENTS
APPROVING USER
Ronni Nivala Sixcel-Motion
APPROVER COMMENT
Email Notification
INTERNAL USER
DISTRIBUTION LIST
Rate Card
EFFECTIVE DATE
02/28/2022
RATE CARD BEFORE/AFTER
RATE CARD CHANGES
Version: 2021-07-25
FIELD NAME FROM TO
Effective Date 2021-07-25 2022-02-28
Regular
FIELD NAME FROM TO
Pay Rate 32.000000 34
Bill Rate 40.950000 43.5098
Overtime
FIELD NAME FROM TO
Pay Rate 48.000000 51
Bill Rate 40.950000 43.5098
California Double Time
FIELD NAME FROM TO
Pay Rate 64.000000 68
Bill Rate 81.900000 87.0196
Sick Time
FIELD NAME FROM TO
Bill Multiplier – 1