## Add and Manage Placement Rate Cards

Rate Cards hold the rate information for a set of Earn Codes for Contract Placements.   A Contract Placement must have at least a base Earn Codes – typically Regular, Overtime and Doubletime. Additional codes (such as Sick Pay, Holiday, Training, etc.) can be included.

Rate Cards are effective dated, so rate changes are tracked for the life of the Placement. If an entered Rate Card version has an error, the Version can be edited.

Add Rate Card
- On a **Placement**, navigate to the **Rate Cards** tab
- Click **Add Rate Card**
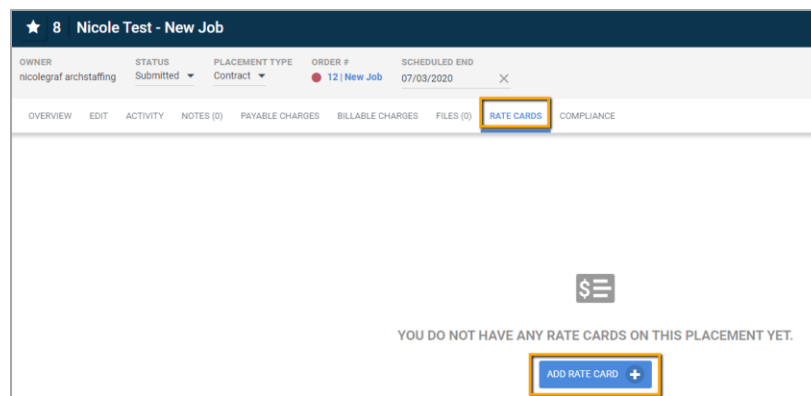
- The **Rate Card** detail screen displays with the Base Rate Earn Codes populated
- **Effective Date** is set as one day prior to the Placement Start Date.
  - This ensures there are valid Rates for the Placement. It should not be changed
- Complete the fields for Regular, Overtime and Doubletime. All are required. Entering and updating fields will cause other fields to automatically calculate.
    - Enter a Regular **Pay Rate.**
    - Overtime and Doubletime Pay Rate automatically calculate based on the **Pay Multiplier**
  - For Regular, enter a **Markup** to calculate the **Bill Rate** or enter a set **Bill Rate**
    - The Overtime and Doubletime **Bill Rate** calculates using the same **Markup**. If no Markup is entered, the Overtime and Doubletime **Bill Rate** calculates based on the **Bill Multiplier**.
    - If the Overtime or Doubletime **Markup** or **Multiplier** is different than Regular, update the specific field
  - If Doubletime is not applicable you can enter either 0 or allow the calculated Doubletime to remain. The Rate is not used unless Doubletime is part of the client overtime rules

- Additional Earn Codes may be populated, based on how the Company is configured, Update the fields to the populate the correct Pay and Bill Rate
- If instructed to add additional Earn Codes, click **Add Rate.** *See Add Additional Earn Codes section for details*
- Click **Save**

Add Additional Earn Codes and Rates

When instructed, include additional Earn Codes on the Placement Rate Card. These indicate there are different items that may be paid and/or billed

- On a **Rate Card** click **Add Rate**
- Select an Earn Code
- Enter a Pay Rate and either a Markup or Bill Rate
  - If you are not billing a client, enter 0 in the Bill Rate field
  - If the Earn Code is Pay Only, the Bill fields are disabled
- Click **Save**

Edit Rate Card

Edit a Rate Card if the information enter is <u>incorrect </u>(was never accurate). Edit correct a mistake. It is not used if the rates are changing.   (See **Add a New Version** if the rate information is changing as of a specific date).
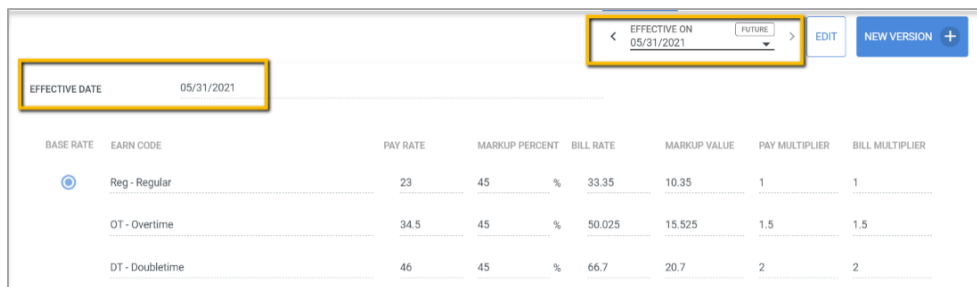
- On a **Placement**, navigate to the **Rate Cards** tab. Access the Version with incorrect details. Click **Edit**
- Update the incorrect fields. If rates are changed, ensure that related rates are accurate
- Click **Save**

Add New Version and View Version of Rate Card

- On a **Placement**, navigate to the **Rate Cards** tab. Click **New Version.** The current version **Rate Card** copies the new Version.

- In **Effective Date** enter the date these rates are valid. This can be a future or past date
- Update the values that are changing. Always consider all Earn Codes when making a change. For example, a new Regular Rate may also mean new rate for Sick or Holiday.
  - o If needed, update the Pay **Rate** and **Bill** fields for Regular, Overtime and Doubletime.
  - o Update any other Earn Code Pay and or Bill fields as needed.
- Click **Save**
  - o If the new version is a future effective Date, the new version is displayed. If not, the current Version is displayed

- To view different Versions, click the **Effective On** drop down
  - o The version currently displayed has a check mark; the Current Version (effective as of today) is in green text. Users can view current and future dated Versions

3