



Vacancy Record - Placements

refers to:

vacancies form → placements

This table shows the candidates who have been placed in the vacancy. Normally you make a placement from the **Short List** but you can add it directly from here. The Placement holds all the details required for invoicing a Perm placement or generating timesheets for a Temp. **It is important to get the details correct.**

To place a candidate from the **vacancy placement screen** (no short list):

- Click on the **Placements** option on the left hand side of the screen.
- Click on the **Add** button. In the selector enter the **keyname** of the candidate you are entering.
- Select the candidate, and click **Ok**.
- Enter/confirm the **start date** and **Leave date** (if known) and click on **OK**.
- If the placement completes the number of posts to be filled you will be asked if you want to change the vacancy state to Filled and change the progress state of all unsuccessful candidates in the short list to Rejected. If you say **Yes** then the status will have to be manually changed when the placement comes to an end.
- Now **complete** the details of the Placement form.

Availability

2.23.1+ There is now a new Tab on the Placement Record for Availability. This reflects the Person's availability on their record and will update if any new Unavailability or holiday days are added via either the Temp Desk Availability tab or the Availability on the Persons Record.

Switchable in User record > Layout Settings > Hide Placement Availability



Temp Placement of Anna Horton as Administrator at 1248

Details: People: Anna Horton, Client: 1248, Jayden Salinas, Job Title: Administrator, Client Department, Their Ref., Contract, Placement Date: 28/09/2022, Override Invoice Layout, Alternative Inv Address: Alt 1, Invoice Prefix: Z, Invoice Email: at1@iqx.co.uk, Invoice Address: 1 Main Street.

Add Placement Extension: Start Date: 07/07/2028, Leave Date, Work Pattern: M_W_F 09:00 7.5 hours, Department: Construction, Consultant: SHELLEY, Our Ref.: 3854, Concurrent or Shifts, Override IR35, Days per Week: 5.

Calendar: Only Match if Availability Entered. Enter Availability, Book Shifts, Enter Holiday, Enter Unavailability, Clear, Last Year, Next Year.

Extending a Placement

When an existing placement requires to be extended rather than create a whole new placement users can use the Placement Extension System (from version 2.21.4 onwards). Users with the layout role to enable them to authorise Placement Extensions will see this new button on Placements.

Temp Placement of Craig Adams as Scott Test 1 at A & M Stephens

Details: Applicant: Craig Adams, Company: A & M Stephens, A Stephens, Job Title: Scott Test 1, Client Department, PO Number, Contract, Placement Date: 09/04/2021, Override Invoice Layout, Sales Brand: Alt1, Invoice Prefix: A1, Invoice Email: at1@iqx.co.uk.

Add Extension: Start Date: 09/04/2021, Leave Date: 13/06/2021, Department: Events, Consultant: SCOTTM, Our Ref.: 3460, Concurrent or Shifts, Override IR35, Days per Week: 5, Work Pattern: MTWTF 09:00 7.5 hours.

When this is pressed you are then prompted to select the reason for the extension, the new leave date and the reporting start date, you can also add any relevant notes at this point.



The 'Add Placement Extension' dialog box contains the following fields and buttons:

- Extension Reason: A dropdown menu.
- Leave Date: A date field with the value 13/06/2021.
- Reporting Start Date: A date field with the value 13/06/2021.
- Notes: A text area.
- Buttons: 'Ok' and 'Cancel'.

All of the changes made are detailed in a placement extension table which can be viewed at the bottom of the Placement. This shows the original Start Date, original Leave Date, the updated Leave Date as well as who changed it and when. This table is also updated if you manually change the Leave Date or create a Provisional Timesheet that is beyond the current Leave Date.

The screenshot shows the 'Temp Placement of Craig Adams as Scott Test 1 at A & M Stephens' window. It includes a left sidebar with navigation options, a central form for placement details, and a table at the bottom for extension history.

Placement Details:

- Applicant: Craig Adams
- Company: A & M Stephens, A Stephens
- Job Title: Scott Test 1
- Client Department:
- PO Number: 12345
- Contract:
- Placement Date: 09/04/2021
- Override Invoice Layout:
- Sales Brand: Alt1
- Invoice Prefix: A1
- Invoice Email: alt1@iqx.co.uk

Extension History Table:

Original Start Date	Original Leave Date	Reporting Start Date	Leave Date	Who Changed	When Changed	Who Authorised	When Authorised	Extension Reason
09/04/21			13/06/21	SCOTTM	26/05/21 10:33	SCOTTM	04/06/21 11:45	
09/04/21			06/06/21	SCOTTM	26/05/21 10:31	SCOTTM	26/05/21 10:31	More Time
09/04/21			06/06/21	SCOTTM	26/05/21 10:31			

This feature requires system administrator setup.

Placement Link

To assist with candidates who work a random pattern over a period of time e.g. a Monday one week, a Tuesday the next and a Thursday and Friday the week after a new view has been added to the placement called Placement Link.

In this view there is a Copy Placement button which will copy the entire placement including question answers, notes, rates, work pattern and the user can then amend any details that need to be updated e.g. work pattern.

If all of the placements relate to each other they can also be linked in this view for ease of navigation.



Temp Placement of Nela Black as HCA Band 2 at 5 Live

Job Reports Delete Withdraw Help

AWR Linked Placement
Shifts
Timesheets
Accounts
Staged Invoices
Questionnaire
Availability
Notes
Contacts
Documents
Location Map
Directions
Job Roles
Audit Trail
Appointments
Chat
Modify Screen
Placement
Extensions
Placement Link

People: Nela Black
Client: 5 Live, Tarris Dog
Job Title: HCA Band 2
Client Department:
Their Ref.:
Contract:
Placement Date: 06/04/2023
Override Invoice Layout:

Add Placement Extension
Start Date: 10/10/2022
Leave Date:
Work Pattern: MTWTF__ 08:00 8 hours
Department: Nursing
Consultant: SHELLEY
Our Ref.: 3857
Concurrent or Shifts:
Override IR35:
Days per Week: 5

Expand Add Delete Copy Placement

Link Type	Our Ref.	Their Ref.	Contract	Consultant	Start Date	Leave Date
Primary	3752	123		SHELLEY	03/04/23	09/04/23
Primary	3859			SHELLEY	17/04/23	18/04/23

see also

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