# Assignment Management

This document provides Hiring Manager and Program Office staff with the steps necessary to manage assignments in IQN VMS. In general, any adjustment to non-contractual aspects of an assignment are **edits** while adjustments to contractual terms are **amendments**. Contract Terms are clearly identified on each assignment record in a separate section and they typically impact the budget. Amendments require supplier acceptance and include approval workflows; edits do not.

**NOTE**: Numeric and bullet lists describe process steps. The information icon () identifies supplemental and/or advisory content.

## To edit an assignment:

1. Log in to IQNavigator using your *user name* and *password*. *Make your Buyer Organization selection during login or use the Change Organization feature once your Home dashboard appears.*
2. Click the **Manage** menu drop-down arrow located in the Header Menu bar.
3. Click **Assignments**. The Positions list screen appears.
4. Use the Search box () or Advanced Search link to find the contractor’s assignment record you want to adjust.

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|  | • Click the double arrow icon ( ) to change the sort order (where applicable) for any specific column.• Click the Configurable Columns link () to add/remove or change the overall display order.• Use the Items per page selector () to adjust how many items display per screen. • Click the Quick View overview icon () to view an assignment record summary and/or drill down to the full assignment record. A checkmark icon () in the Quick View column indicates an approval in process and a circling arrows icon () indicates pending changes to contract terms.• Click the ID-Version hyperlink to view the full assignment details record. The hyphen separates the assignment number from the version number. Each **amendment** generates a new “version” of an assignment to represent the change to contract terms. The user can easily locate the “current” version of an assignment by looking at the version number. There is no new version number for **edits** since there is no change to contract terms. |

1. Click the **See all Actions** arrow () in the Actions column to view the list of action options. Action options vary based on the status as shown in the Current Phase column.
2. Click **Edit Assignment**. The Edit Assignment screen appears.
3. Scroll down to the Assignment Details section to make your changes (i.e., **edits**) to the assignment record. A red asterisk (\*) indicates a required field.

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|  | Notice that the Contract Terms section is “read only”. Changes to Contract Terms require an **amendment**. (The amendment process is covered in the next section.)Any fields in the Assignment Details section that are “read only” are uneditable fields and their content remains unchanged throughout the lifecycle of the assignment record. |

1. Use the available edit features to make your changes:
* The pencil icon () opens all editable fields for a specific line item.
* The trashcan icon () deletes the line item.
* The Add New button () adds a line item.
* The calendar date picker () lets you select a date entry where indicated.
* The question icon () provides insights/tips for specific data fields.
* Use the other features as needed.
1. Click **Submit** to save your edit(s). If no errors are detected, the screen refreshes and indicates, **You have submitted successfully.**If your submit is unsuccessful, check the error alerts and adjust as indicated, then click **Submit** again. Edits go into effect immediately once your submit is successful.

## To amend an assignment (Contract Terms):

1. Complete Steps 1 through 6 as described in the section above*.*
2. Notice that **all** the fields in the Contract Terms section are “read only” while the rest of the assignment record is in <edit> mode.
3. Click the **Amend** button located in the upper right-hand side of the screen. The Contract Terms section is now in <amend edit> mode.
4. Use the calendar date picker () or manually enter a date in the Effective Date field. This designates the date that your **approved** change(s) will take effect.

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|  | When extending an assignment, if the assignment’s End Date is already in the past, then you must enter that End Date as the Effective Date to ensure there are no gaps in the assignment’s duration. If the End Date is a FUTURE date, then enter **today’s** date. This ensures that the extension goes to the Supplier for acceptance as soon as the extension (i.e., amendment) is approved. |

1. Make changes in the Contract Terms section as needed. A red asterisk (\*) indicates a required field. The budget-impacted fields will auto-calculate based on your entries.

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|  | Adjustments may be made to data fields in other sections at this time, but they will be processed as **edits** and not update based on your designated Effective Date; they will be effective immediately once your submit is successful. |

1. Click **Submit** to save your change(s). If no errors are detected, the screen refreshes and indicates, **You have submitted successfully. If you would like to add approvers, click "Add" button.**Click **Submit** again to complete your amendment request. The status updates to **You have submitted successfully.** A summary of your AMENDMENTS displays in the Contract Terms section.
If your submit is unsuccessful, check the error alerts and adjust as indicated, then click **Submit** again. Keep making adjustments as indicated by the error alerts until your submit is successful.
2. Click the **Return To My Positions** button to return to your Manage/Assignments list.

*Optional*. At any time during the amendment approval process, you can return to the Edit Assignment record and click the **Retract** button to cancel the changes you made to the Contract Terms. Once you click Retract, a dialog window opens. Indicate your reason from the displayed list or use the Other Reason text box to explain your retraction. Click **Submit** to complete your retraction.

## To adjust/review the Onboarding checklist:

1. Complete Steps 1 through 5 as described in the “To edit an assignment” section.
2. Click **View Onboarding**. The Position Details screen appears with the Onboarding Checklist in <edit> mode.
3. Adjust/Review as needed.
4. Click **Save** when your adjustments are complete, or,
5. Click **Cancel** when your review is complete.

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|  | Notice that if you choose View Onboarding from the Actions column, you only have the ability to make changes to the Onboarding Checklist on the Positions Details screen. If you need to make changes to other assignment details, click the **See all Actions** arrow (  ) located to the right of the assignment status bar and select Edit Assignment, then follow the instructions in the previous sections to edit or amend the assignment. |

1. Click **« Back** to exit the Positions Detail screen.

## To close an assignment (including evaluation):

1. Complete Steps 1 through 5 as described in the “To edit an assignment” section.
2. Click **Close Assignment**. A Close Assignment dialog window opens.
3. Select your Yes/No response for, “Was this assignment completed successfully?” **NOTE**: YES indicates that the worker did what was expected while on contract while NO indicates that the worker did not meet expectations. If the reason for closing the assignment is related to the assignment (e.g., client no longer wants to keep the position open), then be mindful of how you respond to this question.
4. Click **Next**.

If your response is “Yes”:

* Enter the Actual End Date (required).
* Select reason(s) from the available Reason list (required).
* Click **Next** and complete the Evaluation. A red asterisk (\*) indicates a required field.
* Click **Finish** when your evaluation is complete. Screen refreshes and returns you to the Positions Details screen. Notice that the assignment now has a status of Closed.
* Click **« Back** to exit the Positions Detail screen.

If your response is “No”:

* Enter the Actual End Date (required).
* Indicate if you want to use the same requisition to fill this position with a different resource, (Yes/No).
* Select reason(s) from the available Reason list (required).
* Click **Next** and complete the Evaluation. A red asterisk (\*) indicates a required field.
* Click **Finish** when your evaluation is complete. Screen refreshes and returns you to your Manage/Assignments list. Notice that the Resource’s assignment record is no longer visible on your Assignments list.

## Off Boarding (optional):

Off Boarding tasks are optional in IQNavigator. If a client decides to incorporate off boarding tasks into their program, current options include:

* **As a Position Details checklist** – This would be similar to the Onboarding checklist. With this option, a separate section of the Position Details record is dedicated to off boarding related tasks and the Actions drop-down selection list includes an option for View Off Boarding to provide direct access to this section. Items on the checklist are client-defined.
* **As part of the Close Assignment process** – The client-defined off boarding checklist can be incorporated into the Close Assignment dialog window.
* **As part of the end of assignment evaluation** – Similar to the Close Assignment option, this would incorporate the client-defined off boarding checklist into the end of assignment evaluation process.

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|  | Off Boarding as a status and Off Boarding as a task are two completely different functions. Care should be taken to avoid confusing the two. Off Boarding as a status indicates that an assignment has passed its End Date and needs to be closed. On the Positions list screen, it is a quick way for managers to identify which records need to be actioned—just check the Current Phase column for the status. As a task, Off Boarding is an option that, as noted above, can be incorporated into a customer’s program in a variety of ways. Two of the primary off boarding tasks are deactivating a contractor’s credentials to access the customer’s work location(s) and online systems. |