



# Trustaff Margin Calculator Project Kick Off

06/10/2020 Update

PROPRIETARY AND CONFIDENTIAL

#### Margin Calculator

Trustaff uses today an in-house built Margin Calculator to support the Recruiter's conversation with Candidates to:

- 1. Communicate the position's pay terms
- 2. Negotiate with the Candidate final terms and conditions
- 3. Calculate the match margin
- 4. Document any special terms and conditions

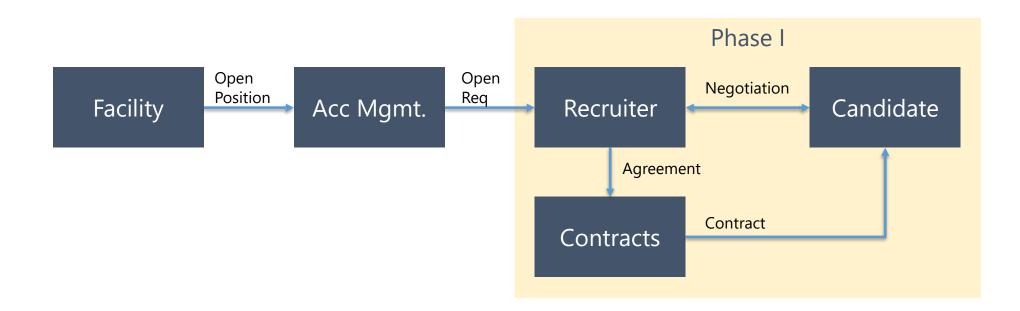
The current tool has the following challenges:

- Long total process time from Contract negotiation to Nurse Contract signed due to multiple reviews, data fixes and manual data entry
- 2. Allows the Recruiter to submit bad information (no proactive validations)
- 3. Uses fixed formulas for margin calculations (i.e. use of averages for some burdens)
- 4. Known exceptions have to be managed manually (36-hr warrantee vs rotating matches)
- 5. Does not reuse erecruit and other sources, creating data discrepancies
- 6. Final calculations have to be reviewed again by Contracts, with a high rate of defects
- 7. No direct transfer from Margin Calculator to final Nurse Contract
- 8. Margin Calculator data has to be typed manually into erecruit

## Objective

Trustaff desires to create a new Margin Calculator that reduces the overall time from contract negotiation to contract signature by:

- 1. Provide Recruiters real-time feedback to avoid bad data entry
- 2. Dynamically use existing data from current systems (erecruit, GL, etc.)
- 3. Ability to add and remove conditions into the Margin Calculation
- 4. Integrates with Contract Management software (Intelagree) to reduce manual data entry
- 5. Automatically flow data into erecruit



#### **System Flexibility** More Automation Less Automation Ability to manage Today **Future** exceptions with back-and-Fit data into predefined 70% flows correctly forth scenarios, if failed, go into Frequently process is predefined exception track completed with phone (less than 10%) calls to make changes

Success Criteria			
Account Management	Contracts	Recruitment	Accounting
Reuse data – enter once use many	Minimize copy & paste to create contracts Flow data from calculator to contract	Fast contract process (speed to signature) Easy to sign (one click) Easier to manage exceptions	Accurate margin calculations

### Phases and Deliverables

In order to create a business solution in the shortest time possible, a phased approach is proposed:

Phase I Minimum viable product

THIS PROJECT KICK
OFF SCOPE

- Create a Margin Calculator that eliminates entry errors (invalid data), thus minimizing time to validate and send back for changes
- Integrate with Contract Management Software (Intelagree)
- Redesign User Interface (UX/UI)
- Deploy solution in Microsoft Azure
- Integrates with Bucket system to minimize downstream process changes

Phase II Real-time data integration

- Integrate with current systems (erecruit, GL, etc.) to pull dynamically formula data
- Integrates with erecruit to document match margin data
- Manage escalations and manager approvals outside Bucket
- Manage Margin adjustments and refresh contracts automatically

Phase III
Full automation

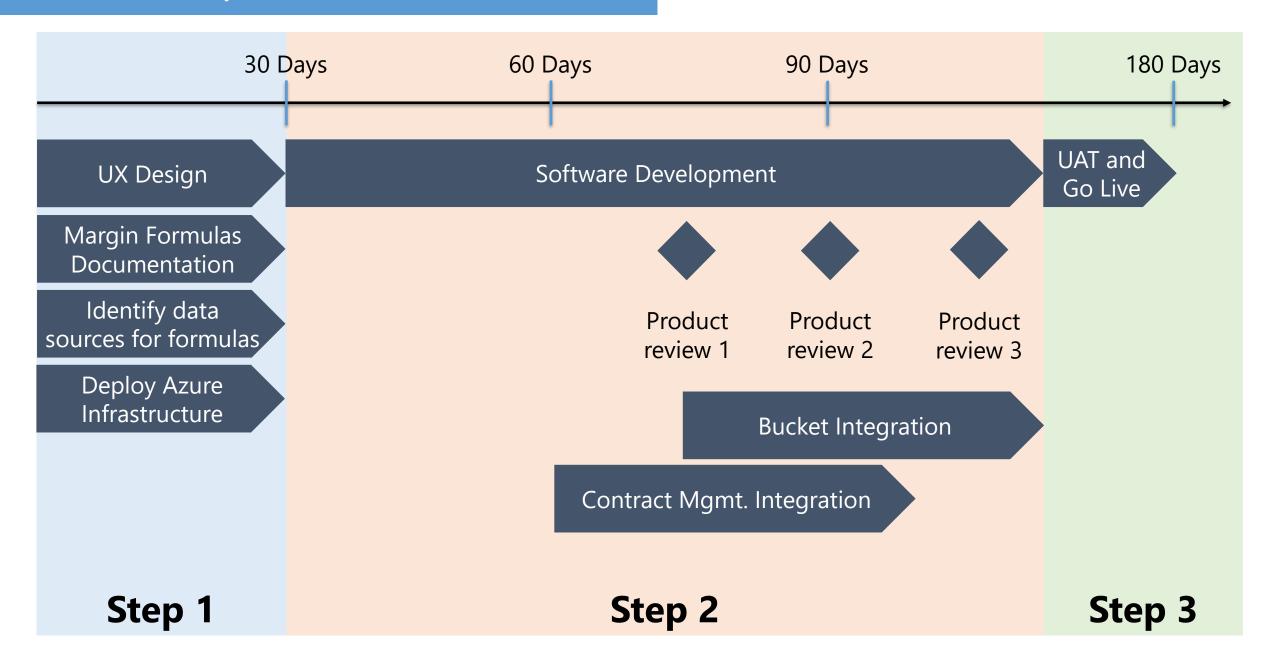
- Full automation from Nurse Negotiation to Contract Signature with no intermediate manual steps
- Add statistical controls and notifications to monitor

Project Plan: 4 months

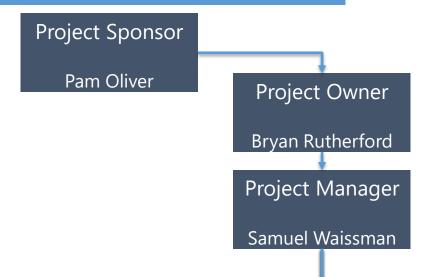
Estimated: 3 months

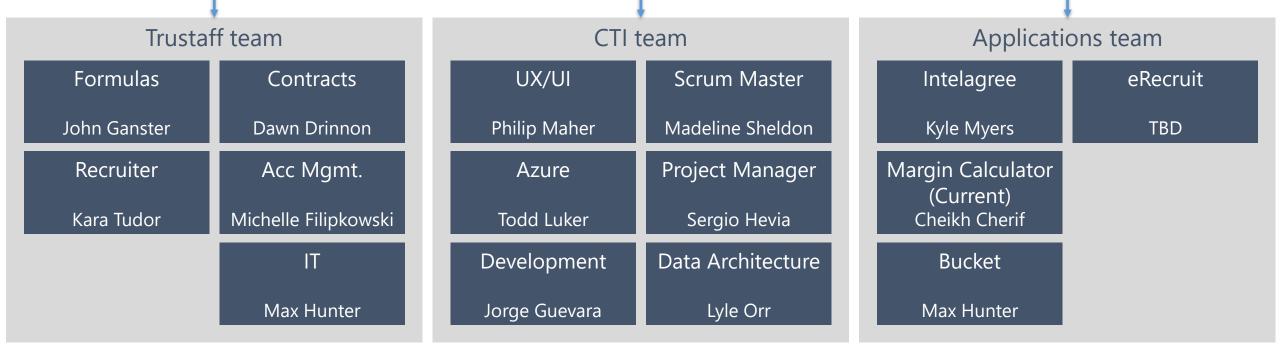
Estimated: 3 months

## Phase I Proposed Timeline



## Project Team







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