

# HR-XML Consortium

## 3.2.1 Contingent Staffing

### Specifications

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HR-XML released a set of specifications in 2002 that it branded as Staffing Industry Data Exchange Standards (SIDES). The equivalent set of "nouns" is carried forward within the HR-XML 3.X generation of specifications, with the exception of `StaffingAction` and `StaffingOrganization`. The prior SIDES specifications also included a set of component schemas shared among the set of SIDES schemas. Within the HR-XML 3.X architecture, the vast majority of components are shared globally across the entire library. Consequently, the separate component schemas in the prior SIDES specifications have either been rolled into those globally shared base of components or replaced with suitable components from that shared base.

The three key staffing schemas in the HR-XML library are:

**StaffingOrder.** Contains a set of information sufficient to place and manage an order with a staffing supplier. Can also be used in "request for quote" (RFQ) operations under which a customer seeks pricing and offer information from a supplier in connection with a "requisition." A staffing requisition (a statement of staffing resource requirements) is a component of an order.

**StaffingResource.** Contains information relating to a person proposed, or with which a staffing customer has contracted, to fulfill a staffed position or role.

**StaffingAssignment.** A staffing assignment conveys the set of terms and conditions related to the placement of a staffing resource with a staffing customer. A staffing assignment document may reference or constitute the contractual agreement between a staffing customer and staffing supplier with respect to the staffing placement. The `StaffingAssignment` document brings together information about the resource requirements to be filled (the requisition or position referenced in a `StaffingOrder`), with the resource selected to fill that position (previously described and communicated using the `StaffingResource`), and the various agreed upon terms (pay rates, start date, and expected end date among other details).

## Actors

Actors commonly involved within supported staffing scenarios are:

- **Staffing Supplier.** A staffing supplier or "staffing agency" identifies and provides human resources to fill service requirements defined by a customer organization. Staffing companies typically maintain an employment relationship with the resources supplied to the customer. Typically, customers turn to staffing agencies to fill project-based, temporary, or so-called "contingent" staffing needs. Some customers also may use a resource's assignment under a staffing arrangement to evaluate the resource's fit for direct employment within the customer organization. Staffing suppliers typically assume legal and payroll tax obligations with respect to

the resource whereas the customer merely pays the supplier a set rate (and possibly expenses) to the staffing supplier.

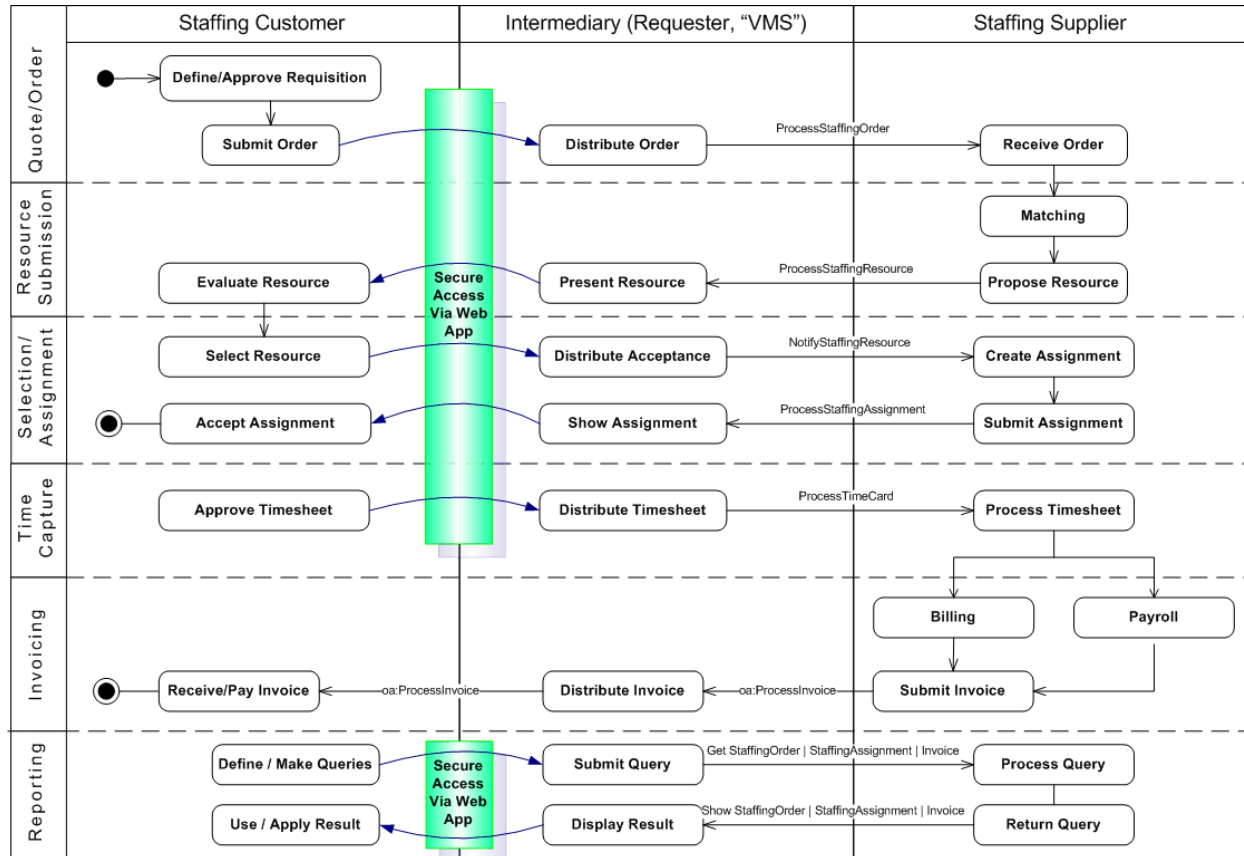
- **Staffing Customer.** A staffing customer is a party that procures the services of contract or temporary workers or similar resources through a staffing agency. The customer may work directly with a specific supplier or may work with one or more suppliers through an intermediary staffing vendor management service.
- **Master Vendor (MV).** Manages the contingent labor needs of a client giving first preference always to their own inventory of temporary employees.
- **Vendor on Premise (VOP).** A Master Vendor who manages the client's labor need onsite. This presence makes the relationship between vendor and client closer, leading to better understanding and quality of service. This is a somewhat archaic term since this practice is now more common for accounts of any size.
- **Vendor Management System (VMS).** The system, generically known as an eProcurement Tool, which supports several different business models: Vendor Managed Services, Managed Services Provider (MSP), Master Vendor (MV), etc. The use of the system should not imply the exact transactional business model in place.
- **eProcurement Tool.** The application used by a Managed Service Provider (MSP), Vendor on Premise (VOP), Master Vendor (MV), Vendor Managed Service, etc. to help provide their service.

Other possible actors include applicant tracking systems (some ATS systems may also have certain VMS capabilities), job boards, and a variety of other intermediary or third-party recruitment service providers.

Of course, the candidate or human resource is the other actor involved in staffing scenarios. However, HR-XML specifications do not specifically address direct interactions with candidates.

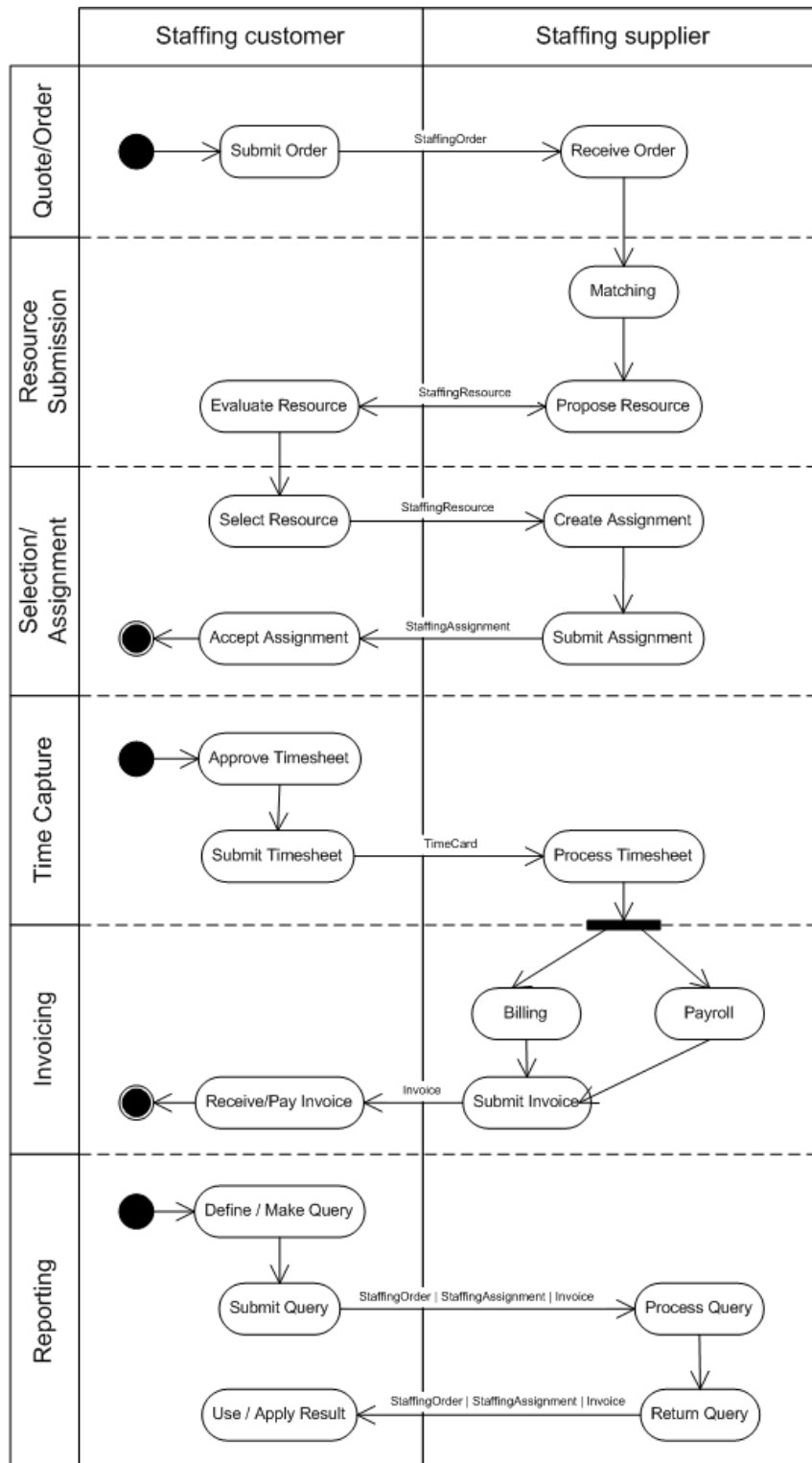
### Intermediary Staffing Order Scenario

The diagram below is intended as a high-level depiction of the way HR-XML specifications can be used to support staffing processes.



### Traditional Process Scenario

The diagram below illustrates the HR-XML transactions between staffing customers and suppliers without an intermediary.



## Staffing Order

### Overview

The StaffingOrder noun is used to communicate resource requirements that a customer desires to fill through the services of a staffing agency. The StaffingOrder can be a direct order, or it can be an request for quotation (RFQ). The StaffingOrder is also used to send back information from the staffing agency to the customer on offered resources. The order and RFQ are communicated by customers to staffing suppliers either directly or through intermediary vendor management or staffing management services. The Quote is communicated by staffing suppliers to customers either directly or through intermediary vendor management or staffing management services.

### Trigger / Preconditions

#### *Order/RFQ*

An order is directly triggered by the approval to place an order to fill a staffing requisition. A RFQ is directly triggered by an open position and the need to fulfill that position. A requisition is a definition of resource requirements.

Common events that create or contribute to staffing resource requirements are:

- **Project Commencement.** The commencement of a new project or anticipation of a project start can trigger the need to bring on board new resources - direct hires and/or temporary staff sourced through a staffing supplier. These projects might be relatively long lived (months or years) or in some cases very brief (an event of hours or days).
- **Busy Periods.** Some businesses have seasonal or otherwise cyclical "busy periods" during which regular staff must be augmented with temporary resources. These might be direct hires and/or temporary staff sourced through a staffing supplier.
- **Family or Medical Leave.** Employers may grant or in some jurisdictions, be required to grant, leave to employees for such reasons as the birth and care of the newborn child of an employee; placement with the employee of a child for adoption or foster care; care for an immediate family member (spouse, child, or parent) with a serious health condition; or when the employee is unable to work because of a serious health condition. Where mandated by law, there may be associated notice and record keeping requirements. Extended periods of leave also can result in the need to transfer or requisition resources to fill the employee's responsibilities during the period of leave.
- **Business Growth.** Periods of rapid business growth can trigger the need for new resources - both in the form of regular hires and contingent staff.



A quote is directly triggered by the reception of an order or RFQ. A Quote contains general information about the offered resource and contains a reference to a StaffingResource that provides specific information about the offered resource.

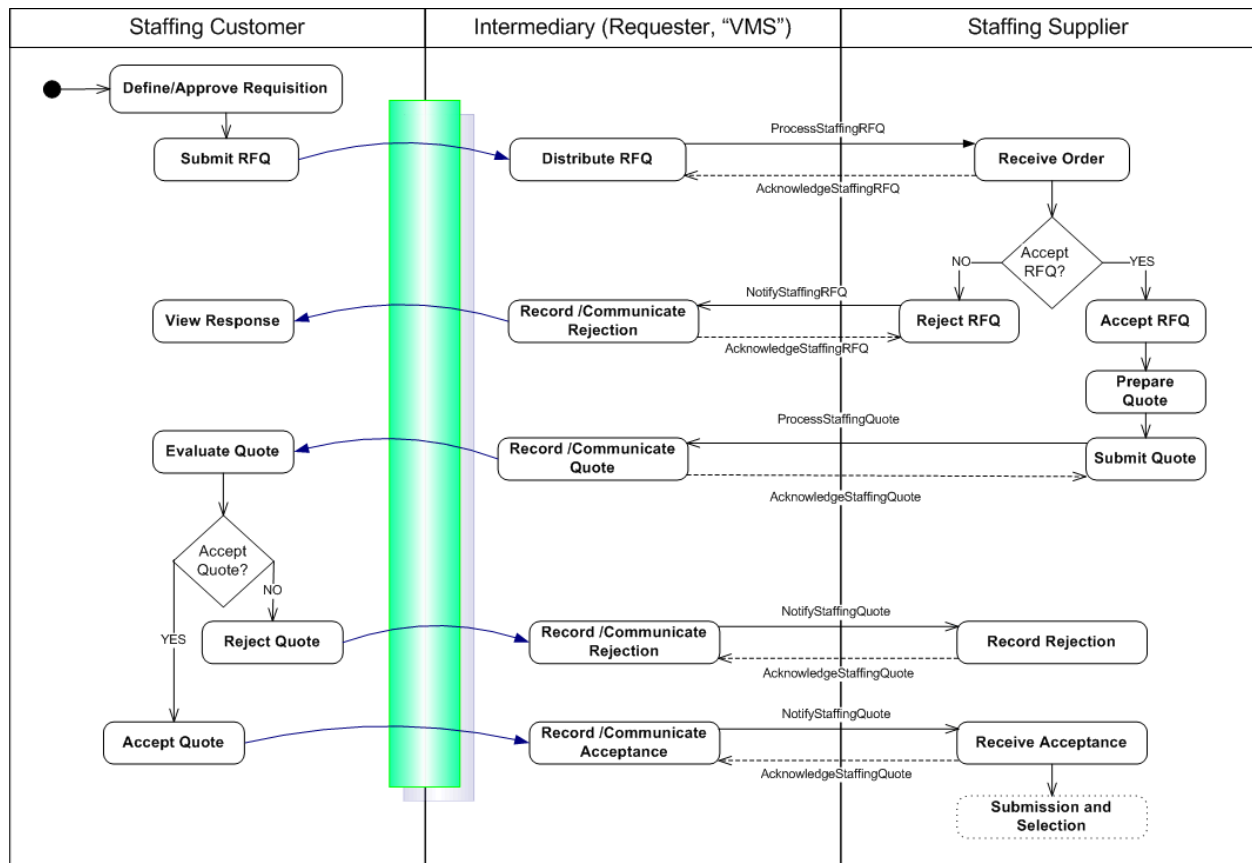
Preconditions for sending the Quote are:

- **Receipt of an Order.** In the case where a customer sends an order to the staffing supplier, the supplier is expected to send a quote to offer a resource. In the case where a customer asks for multiple resources in one order, the staffing supplier is expected to send a Quote for each person offered.
- **Receipt of a Quote.** In the case where a customer sends an RFQ to the staffing supplier, the supplier is expected to send a quote to offer a resource. In the case where a customer asks for multiple resources in one RFQ, the staffing supplier is expected to send a Quote for each person offered.

### Intermediary Staffing Order Scenarios

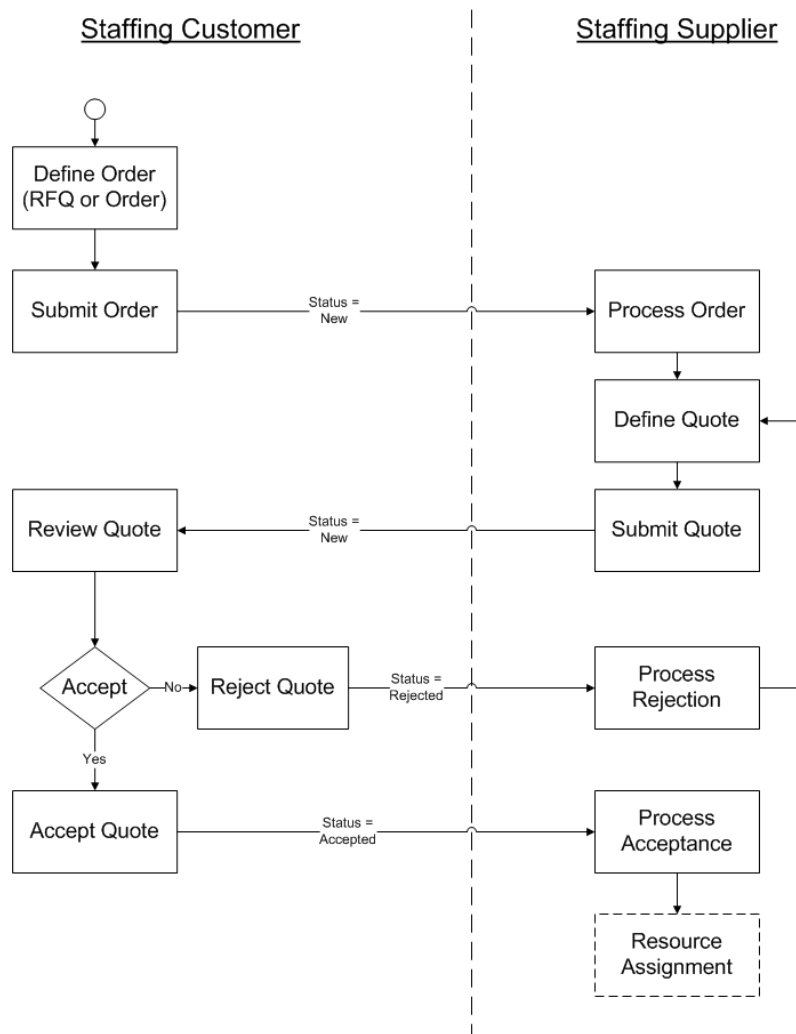
Staffing Requisition/Order created in Intermediary: A staffing requisition/order is created by the hiring manager/staffing customer user or staffing management services (MSP, VOP or Master Vendor ). Based on the flexibility of the Intermediary system, the staffing customer sourcing rules and approval workflow, the staffing requisition/order is sourced to the staffing suppliers.

Staffing Requisition/Order interfaced into Intermediary: A staffing requisition/order is created by the hiring manager/staffing customer user in a 3rd party system. The main purpose of this model is to take advantage of the familiarity with the system, existing approval hierarchy and position management. The staffing requisition/order is interfaced into the Intermediary system and is automatically sourced to the staffing suppliers based on the customer sourcing rules.



### Traditional Staffing Order Scenario

The diagram below illustrates the transaction between the Staffing Customer and Staffing Supplier without an Intermediary.



## Overview

The StaffingResource noun provides a staffing supplier a means to communicate and manage information about a person who is a resource or a potential resource to fill customers' staffing requirements.

Note: The Staffing Resource is somewhat parallel in concept to the Candidate noun. In the version 3.X architecture, both nouns are based on many of the same underlying data types for personal data and "profile" information (work experience, educations, etc.). Thus, core data from one noun can easily be mapped to the other. The difference between the two is that StaffingResource contains additional details tailored to interactions between staffing suppliers and staffing customers. For example, StaffingResource allows for the specification of the staffing supplier's rates associated with the resource. StaffingResource also supports such things as the ability to associate a resource with a particular staffing requisition or order.

## Triggers / Preconditions

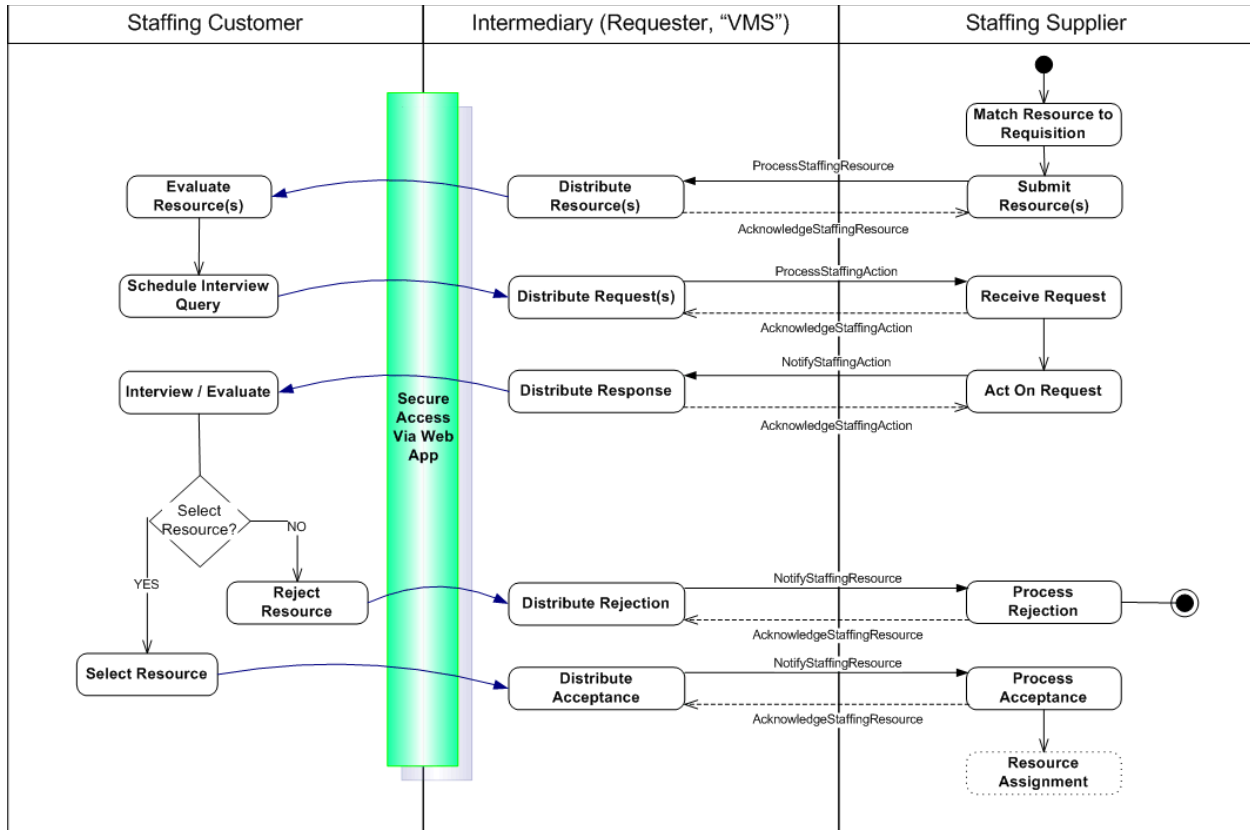
Candidate submission usually comes in response to a specific staffing order or requisition. However, some staffing suppliers may have arrangements to be on an on-going search for resources to fill certain types of positions. While a staffing or definition resource requirement would precede submission, immediate triggers include:

- **Candidate Match.** This refers to the result of an initial search process that identifies the candidate as someone who may meet basic job qualifications for a position opening or staffing requisition. The candidate may have been identified as a result of his or her application for an opening or the candidate may have been sourced from a search of a database or other candidate source. Additional research and screening may be necessary to confirm that the individual satisfies job qualifications.
- **Candidate Submission.** This occurs when a third-party recruiter ("head hunter") or staffing supplier submits a candidate to a client or other organization seeking to fill a resource need.
- **Candidate Qualification.** Broadly speaking, this refers to a stage within the employer's hiring process at which the candidate is considered to have met the basic job qualifications or otherwise still remains within a pool of candidates considered for a position after the elimination of unqualified candidates. The process and policy governing how candidates are qualified varies widely from employer-to-employer. The key aspect of "qualification" as an event, is that it is likely to trigger other hiring or evaluation processes, such as the scheduling of on-site or follow-up interviews and pre-employment assessments and screenings. Qualification often is not a single threshold, but a series of graduated thresholds, each of which might serve

## Supported Processes

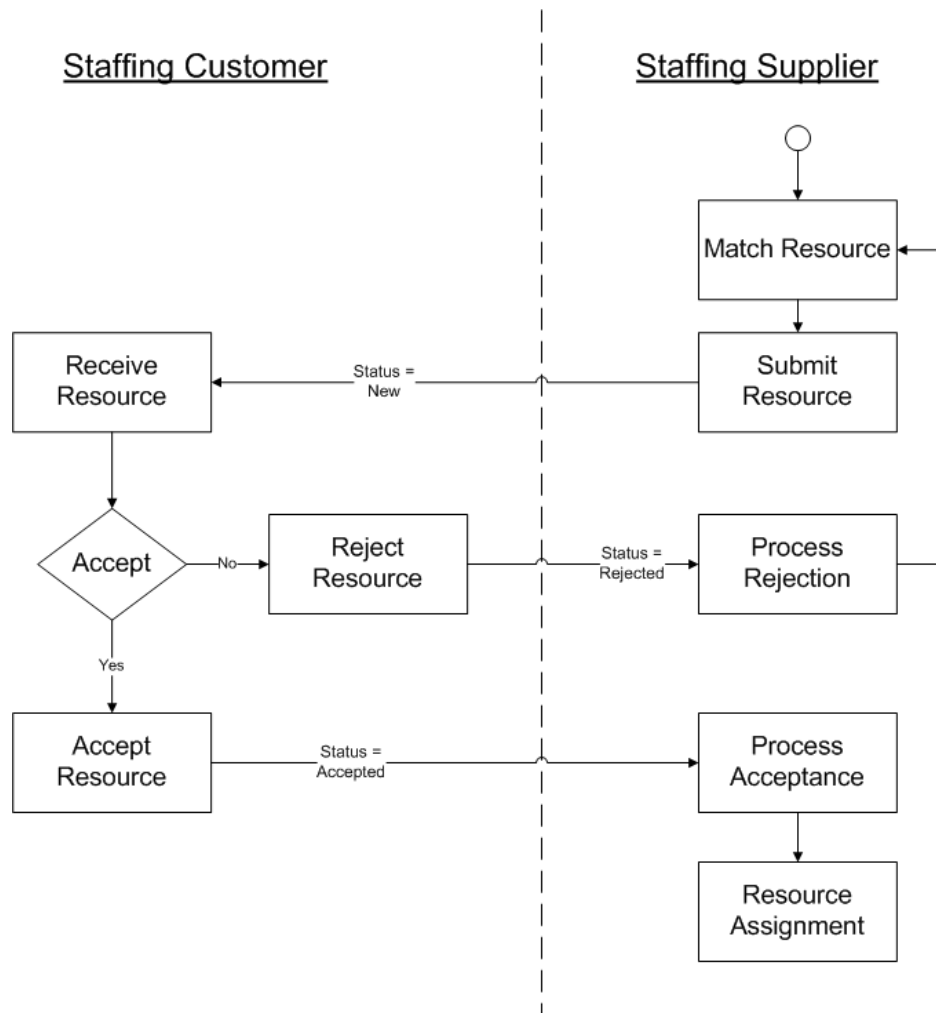
### Intermediary Staffing Order Scenario

The diagram below illustrates the transaction between the Staffing Customer and Staffing Supplier with an Intermediary.



### Traditional Staffing Resource Scenario

The diagram below illustrates the transaction between the Staffing Customer and Staffing Supplier without an Intermediary.



### Overview

The StaffingAssignment noun is used to confirm, document, and manage terms agreed upon between a staffing customer, staffing supplier, and human resource concerning the deployment of the staffing resource. The StaffingAssignment document brings together information about the resource requirements to be filled (the particular requisition, position, etc. referenced in the StaffingOrder), with the resource selected to fill that position (previously described and communicated using the StaffingResource), and the various agreed upon terms (rates, start date and expected end date, etc.). This StaffingAssignment document may itself constitute a contract between a staffing supplier and staffing customer and also may reference or include the contract between the staffing supplier and staffing resource.

### Trigger / Preconditions

Interactions are triggered when staffing assignment terms are proposed, agreed upon, or updated (a change of assignment end date, for example).

- **Begin Assignment.** This is the beginning of an individual's assignment or engagement within a particular work role or with a particular client employer. A new assignment can trigger a variety of related activities, such as training and development, the start of probationary review cycles, the recording of applicable administrative and pay changes, and the granting of necessary access, equipment, and other facilities necessary for the individual to be fully productive within the new assignment.
- **End of Temporary Assignment.** The end of a temporary assignment would trigger a variety of processes, including the suspension of certain access and de-provisioning of accounts or privileges created for fulfillment of the temporary assignment. For an individual placed by a staffing agency, the end of an assignment would trigger notifications relating to the assignment termination as well as tasks such as preparation and submission of final time cards and final invoice preparation.
- **Project Completion.** Project completion might trigger a wide variety of tasks, such as updating objective plans, reporting results against an objective plan, performance review, calculation of any associated compensation, termination of the completed assignment, and reassignment.
- **Staffed Project Completion.** In the case of projects staffed with outside resources, project completion might trigger tasks as termination of the completed assignment, reassignment, and such events as preparation and submission of final time cards and associated final invoice preparation.

The diagram below depicts one of many possible scenarios. The management of a staffing assignment typically involves a series of communications. Typically, the assignment confirms and brings together facts that have already been agreed to with respect to the assignment. Before an assignment begins, proposed or "finalized" terms usually are communicated to the staffing customer by the staffing supplier. Likewise, the end or termination of an assignment also would likely be communicated, particular in cases where such termination occurs before an expected assignment end date. In other cases, facts surrounding the assignment and changes to those facts might require reporting and/or affirmative approval or rejection by one of the parties.

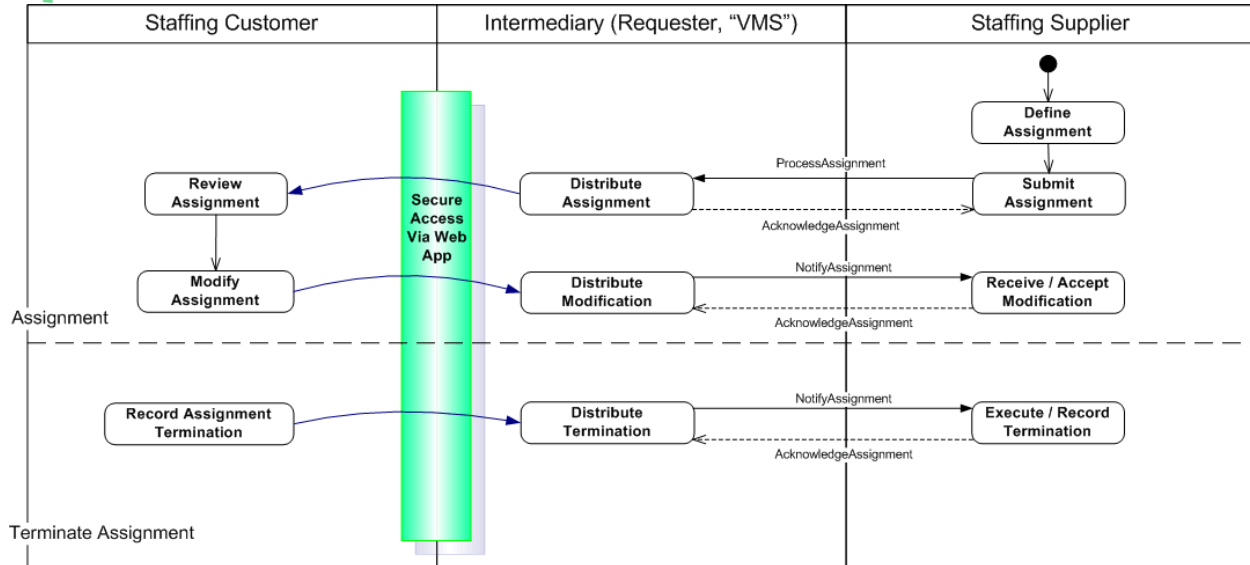
The diagram describes the initial creation of an assignment by the staffing supplier using `ProcessStaffingAssignment` and then a subsequent update or change by the staffing customer using `NotifyStaffingAssignment` (for example, a change in start or end date). Similarly, `NotifyStaffingAssignment` is used to communicate the end of the assignment, which would be particularly relevant in the case of project-based work where the assignment end date might fall before or after an expected project end date.

### **Intermediary Staffing Order Scenario**

This scenario assumes that both requester and supplier systems host web services to carry out the interaction. This may not always be the case. In some cases, one part of the communication might be fulfilled using "out-of-band" communications means such as fax, telephone, etc.

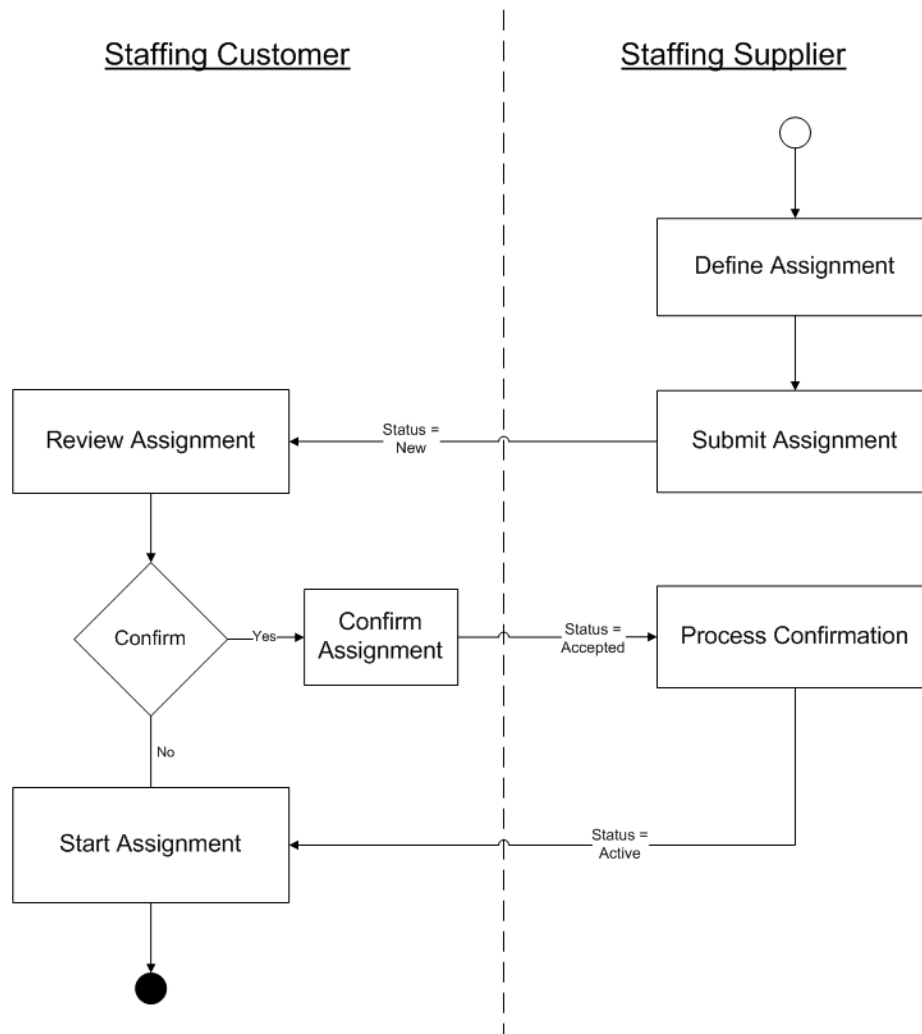
A staffing work order/assignment is created in the Intermediary (VMS, MSP, VOP) system by a customer service coordinator or staffing management services. Depending upon the customer rules, the staffing assignment may be routed through approval process, typically customer approval process and a staffing supplier approval process. In the customer approval process, the customer approver is verifying purchase orders, dates, rates etc. After the staffing customer approval process, the staffing workorder/assignment is routed to the staffing supplier for approval. The staffing supplier approval process typically involves the staffing agents to verify the rates, dates and add any staffing supplier reference information for future use. Once the staffing work order/assignment is accepted by the staffing suppliers, the staffing assignment is triggered to the suppliers for consumption.





### Traditional Staffing Assignment Scenario

The diagram below illustrates a transaction between the Staffing Customer and Staffing Supplier without an Intermediary.



## Appendix A: Examples

Examples for each of these components can be found in the Instances folder.

### Staffing Order

*ProcessStaffingOrder-Example-1.xml*

*ProcessStaffingOrder-Example-2.xml*

*ProcessStaffingOrder-Example-3.xml*

*ProcessStaffingOrder-Example-4.xml*

*ProcessStaffingOrder-Quote-Example-1.xml*

*ProcessStaffingOrder-RFQ-Example-1.xml*

### Staffing Resource

*ProcessStaffingResource-Example-1.xml*

*ProcessStaffingResource-Example-2.xml*

*ProcessStaffingResource-Example-3.xml*

### Staffing Assignment

This example creates a new StaffingAssignment document that proposes terms of a staffing assignment. Note that the ContractStatusCode = Unsigned.

*ProcessStaffingAssignment-Example-1.xml*

This example communicates that the contract has been accepted and signed. Note that the ContractStatusCode = Signed. Note also that this BOD instance uses an "incremental" style of data management where only the changed fields of the related document are communicated. A full refresh (a so-called "snap shot") approach is an alternative approach, but not presented here.

*NotifyStaffingAssignment-Example-1.xml*

Whether and how a customer can cancel a staffing assignment order requires an understanding between trading partners. The "Cancel" verb is used "where the business implications must be calculated and a simple data processing term such as delete can't fully convey the business meaning and required processing associated with the meaning."

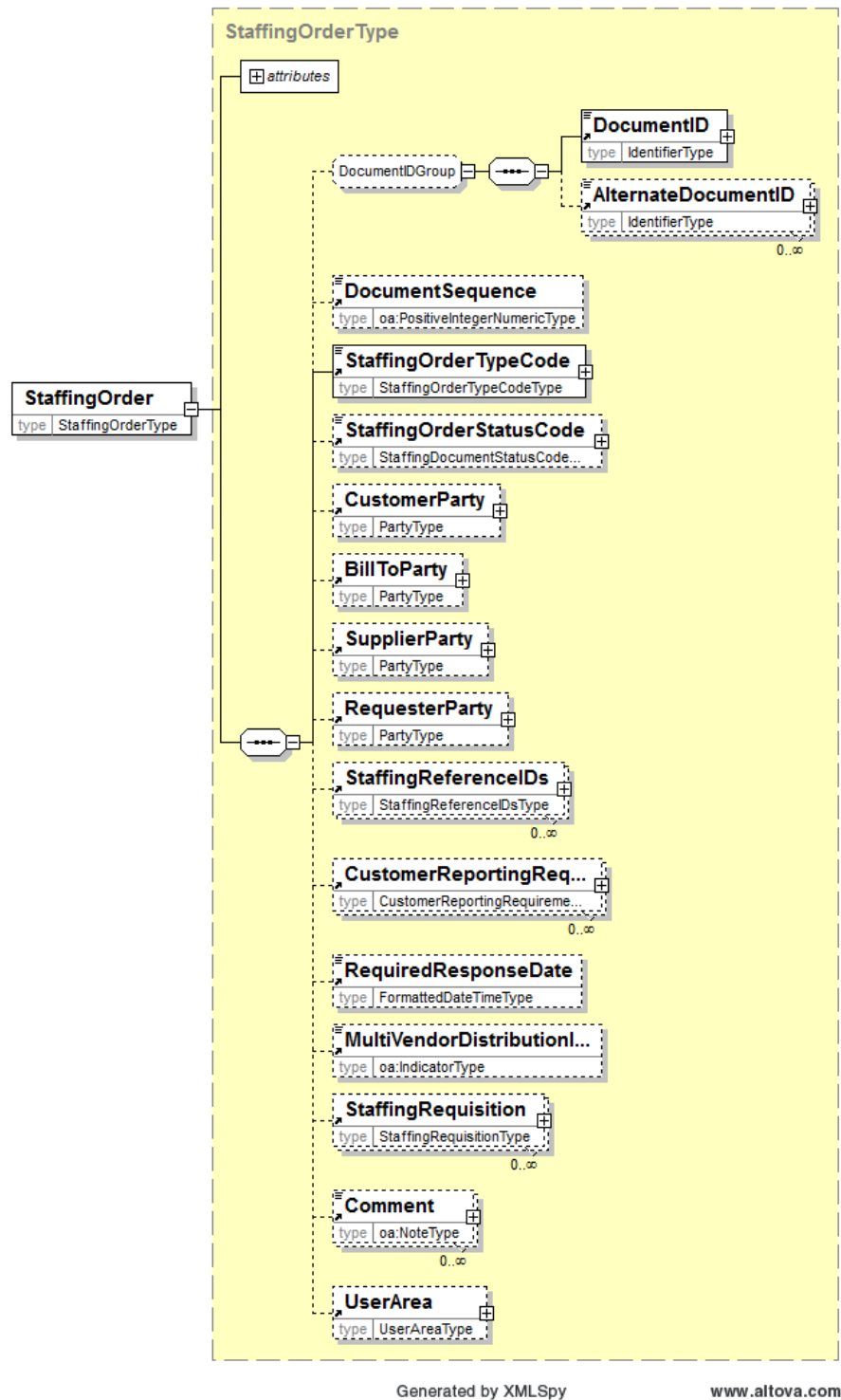
- An "Incremental" update approach is assumed.

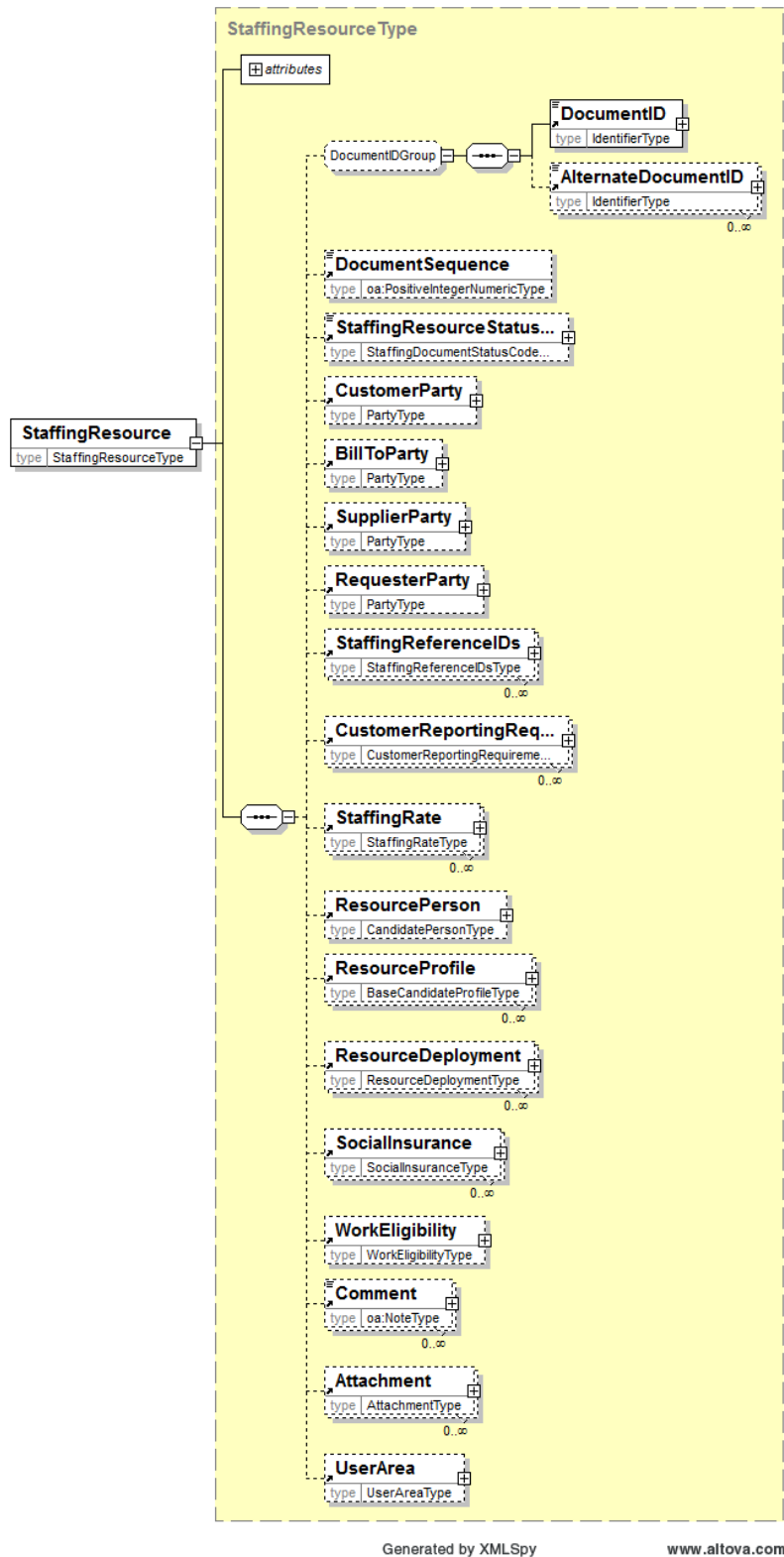
- The ActionExpression is scoped at the /CancelStaffingAssignment/DataArea/StaffingAssignment level. "Delete" is specified as the actionCode.
- The associated DocumentID is specified. No other content is provided.

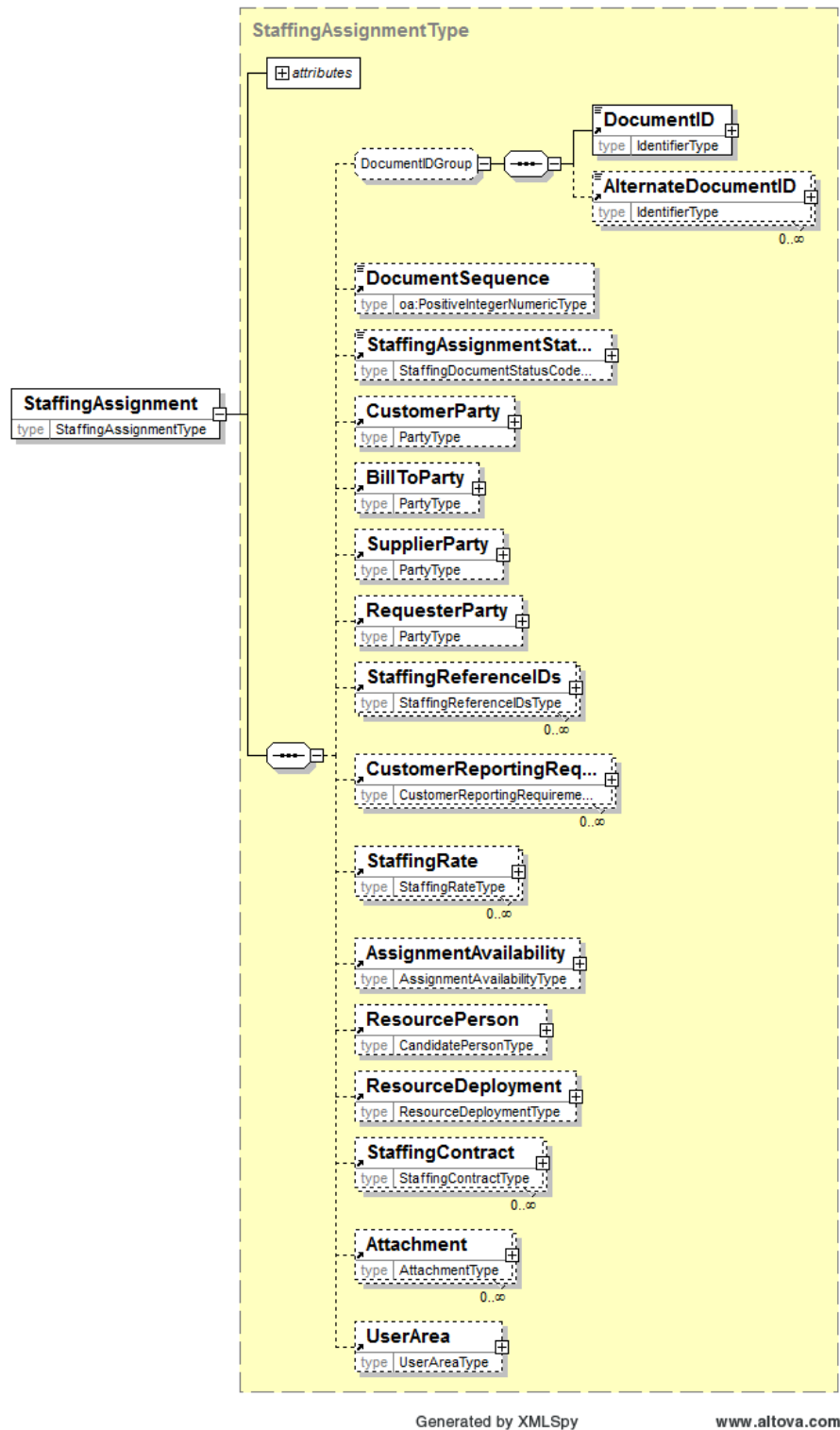
*CancelStaffingAssignment-Example-1.xml*

## Appendix B: Noun Layouts

### Staffing Order



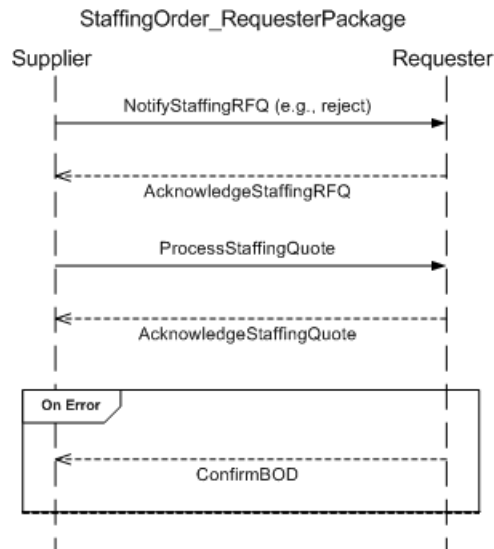




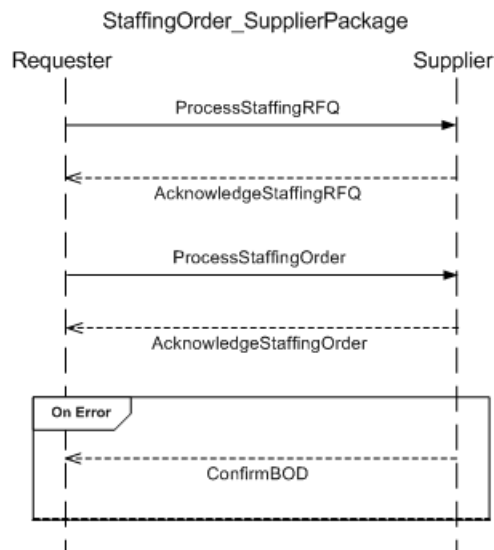
## Appendix C: Business Document Object (BOD) Diagrams

### Staffing Order

A service that a staffing customer or requester would host to handle responses to "request for quotes" (RFQ), and to receive quotes. Note: StaffingRFQ and StaffingQuote use the StaffingOrder noun with a StaffingOrderTypeCode to differentiate the type of order.



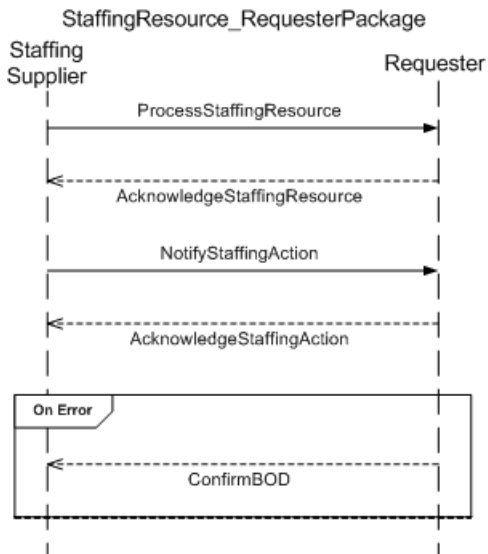
A service that a staffing supplier would host to process "request for quotes" (RFQ), quotes, and staffing orders. Note: StaffingRFQ and StaffingQuote use the StaffingOrder noun with a StaffingOrderTypeCode to differentiate the type of order.



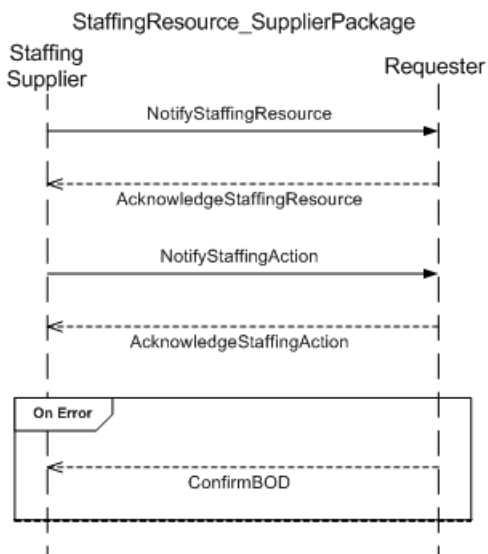


## Staffing Resource

A service that a staffing customer or intermediary system would host to manage submissions by staffing suppliers of proposed staffing resources. Note: StaffingAction is not included in this 3.2.1 release and is only used here to describe one possible business interaction.

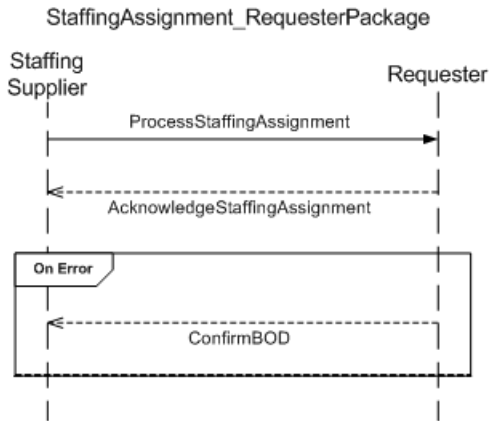


A service that a staffing supplier would host to handle interactions following or related to the submission of proposed staffing resources to fill a staffing customer requisition. Note: StaffingAction is not included in this 3.2.1 release and is only used here to describe one possible business interaction.



## Staffing Assignment

A service that a staffing customer or intermediary system would host to manage assignment documents submitted by staffing suppliers. The StaffingAssignment sets out the terms under which a resource will fill a requisition.



A service that a staffing supplier would host to handle interactions following or related to a staffing assignment with a staffing customer. The StaffingAssignment sets out the terms under which a resource will fill a requisition.

