



matrix

cr.net

Supplier Guide - Agency Workers

Contents

1

[Who are Matrix?](#)

2

[How Does the System Work?](#)

3

[Registration, Accreditation and Enrolments](#)

4

[Order Review and Candidate Submission](#)

5

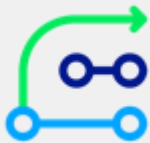
[Placement and Timesheet](#)

6

[Who to Contact](#)

Who are Team Matrix?

- As a Neutral Vendor Managed Service Provider, we specialise in managing and improving recruitment supply chains
- Team Matrix brings **Technology** and **People** together to improve **Clients** recruitment processes and supply chains
- We believe temporary recruitment should be reliable, simple and fast while reducing costs:



Using technology to ensure transparency and delivery of the best candidates



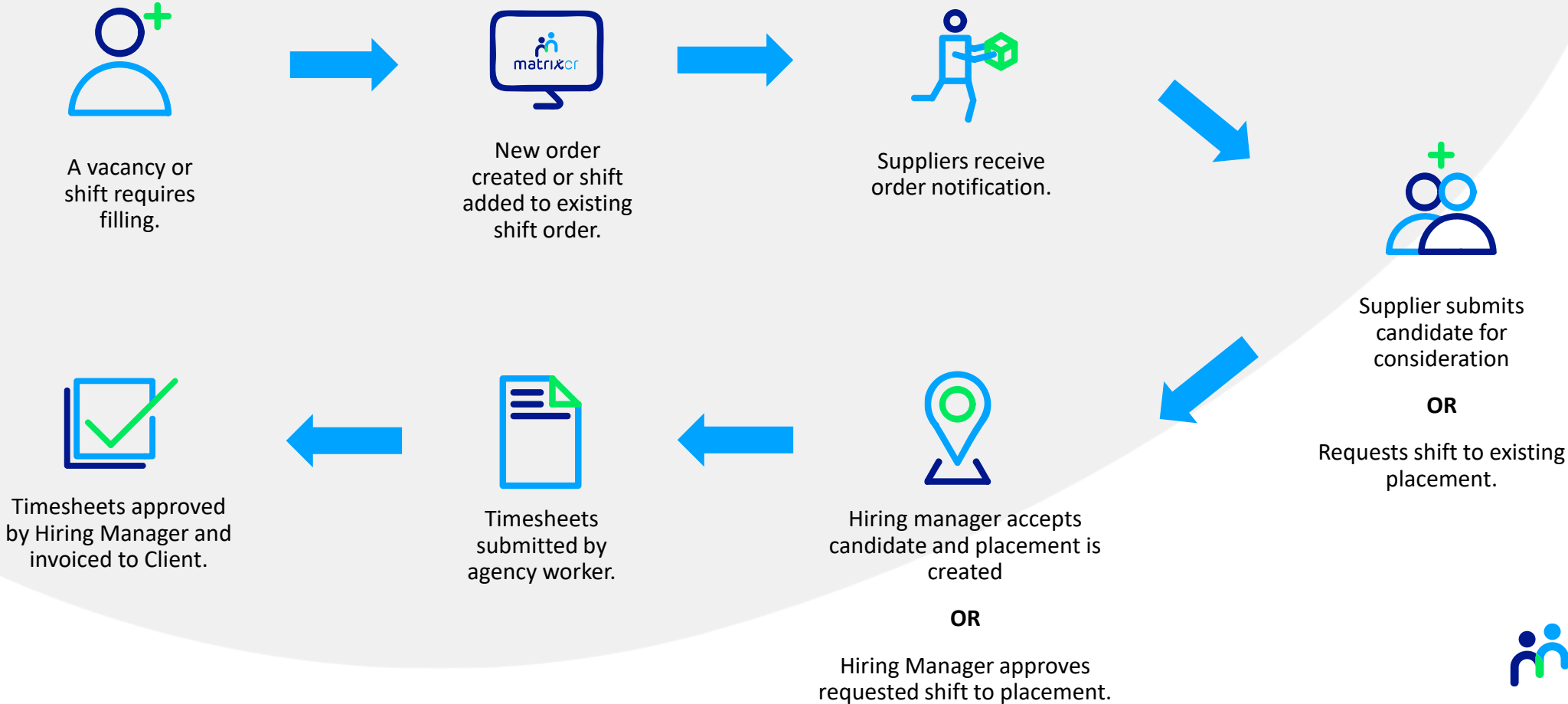
Driving savings on year-on-year spend with the support of our expert staff



Ensuring Clients receive the best value from our system and services

How does the system work?

The End-to-End Process



Contents:

[Registration](#)

[Login](#)

[Home Screen](#)

[Adding Supplier Locations](#)

[Accreditation](#)

[Enrolment](#)

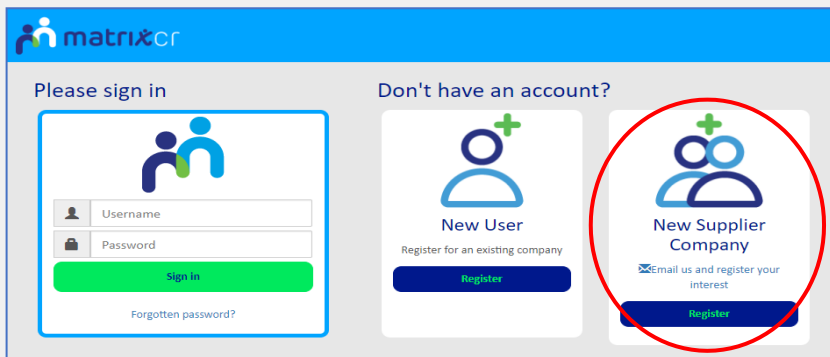
[Resubmitting a Failed Review](#)



Registration, Accreditation, and Enrolments

Registration

1. Visit www.matrix-cr.net in your internet browser
2. You can register as a new Supplier from the Matrix-CR.net login page:



3. Complete the required registration fields with your Company information:

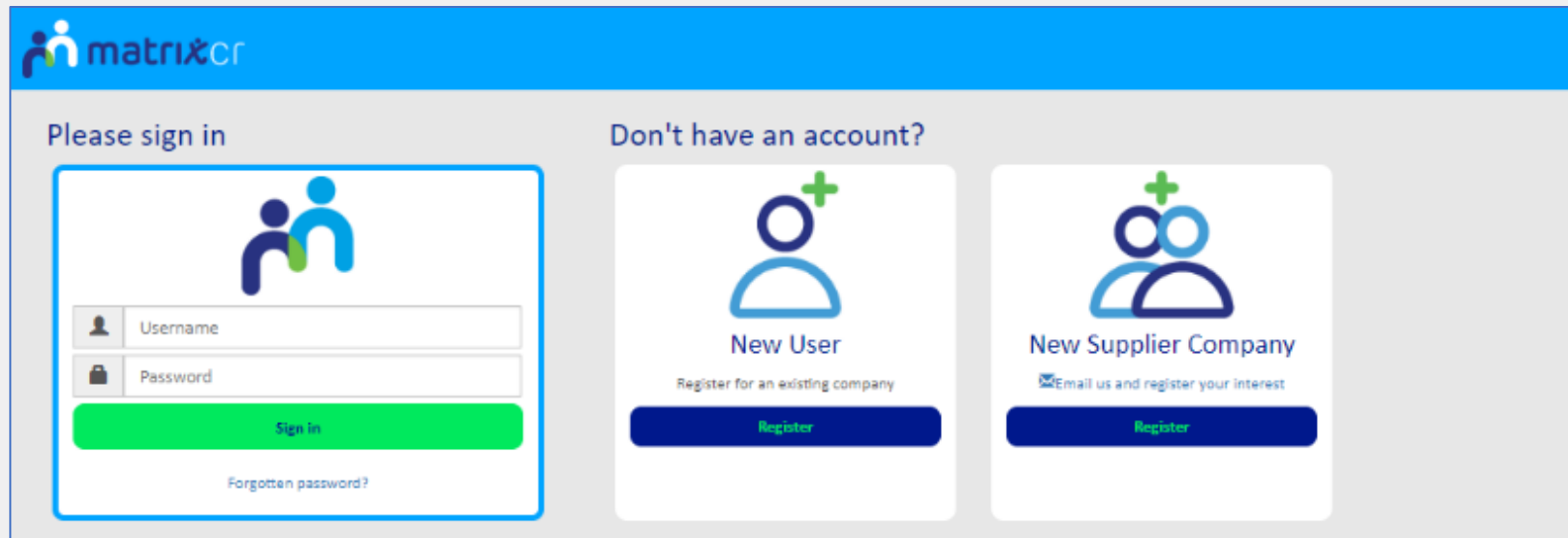
4. Complete the User details fields to set up your user profile:

5. Click **'Finish'** to complete the registration process. You will receive your Username and Password via email.

Login

Visit www.Matrix-CR.net in your internet browser

1. Login to your Matrix-CR.Net profile by entering your Username and Password.
2. If you have forgotten your Password, please click on the '**Forgotten password?**' link underneath the Sign In button and follow the instructions.

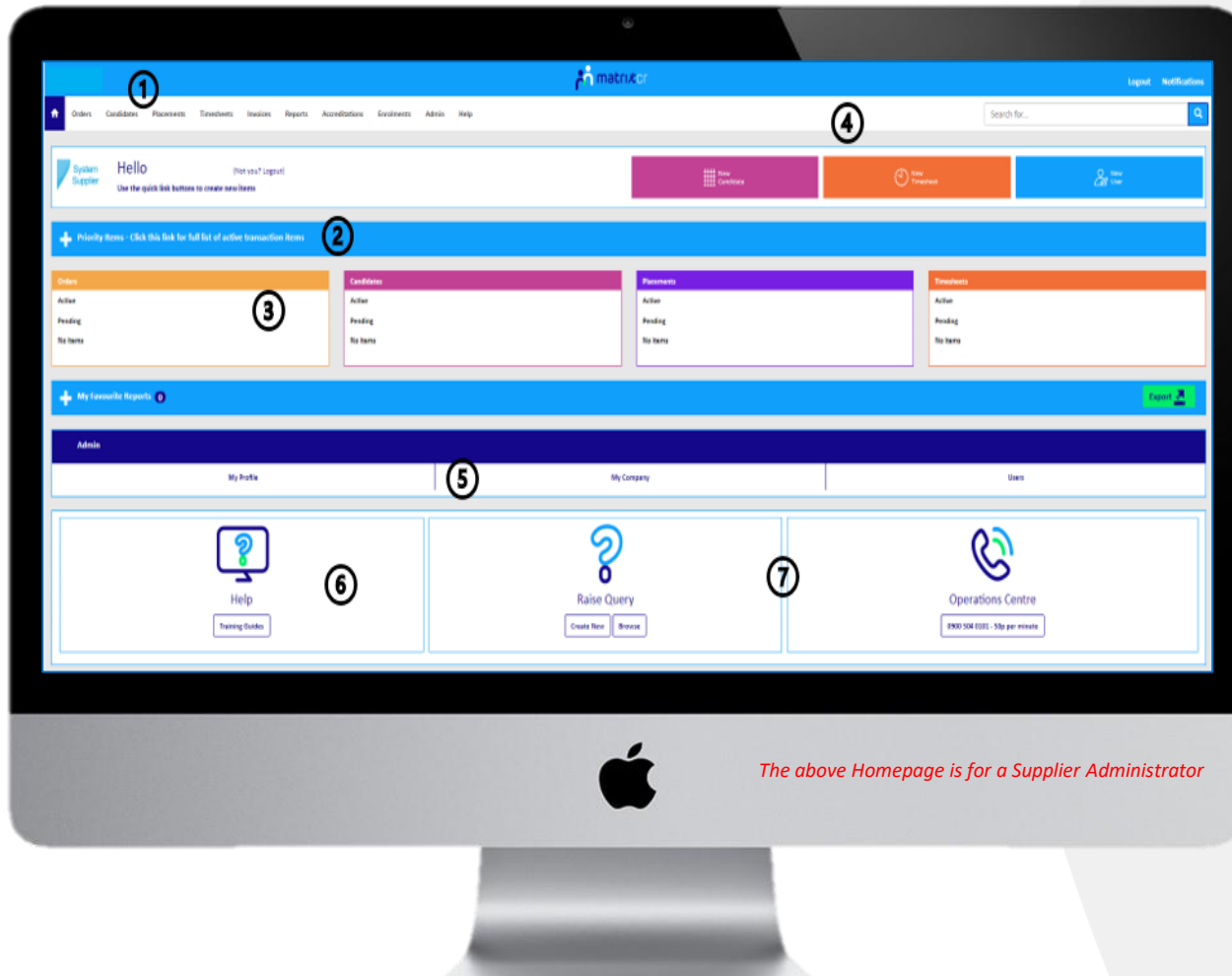


The screenshot shows the Matrix-CR website's login and registration page. At the top left is the Matrix-CR logo. The page is divided into three main sections:

- Please sign in:** This section contains a login form with two input fields: 'Username' and 'Password'. Below the fields is a green 'Sign In' button. Underneath the button is a link for 'Forgotten password?'.
- Don't have an account?:** This section contains two registration options:
 - New User:** Features a user icon with a plus sign, the text 'New User', and the subtext 'Register for an existing company'. Below is a blue 'Register' button.
 - New Supplier Company:** Features a group of people icon with a plus sign, the text 'New Supplier Company', and the subtext 'Email us and register your interest'. Below is a blue 'Register' button.

When successfully logged in, you will be taken directly to your Matrix-CR.Net homepage

Home Screen

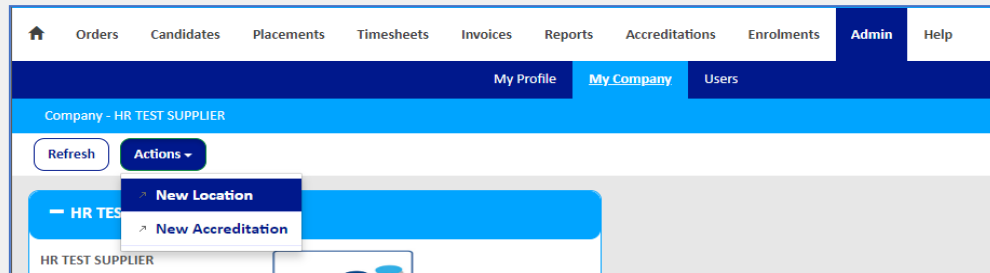


1. **Navigational tabs** to each corresponding section and sub tabs on CR.Net
2. **List of Priority Items** – this is anything requiring your action or attention
3. **Quick access buttons** to each stated sub tab section
4. **Quick buttons** for adding New Timesheets, New Candidates and New Users
5. **Admin sub sections** for personal profile management and Company information
6. **Training Guides** and Videos available on CR.Net
7. **Different methods to contact** the Customer Success Team

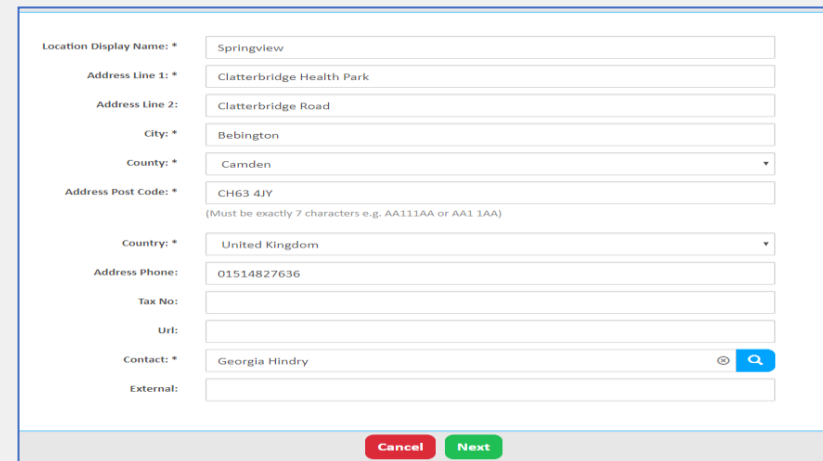
Adding Supplier Locations

Your Company's branches can be set up separately on Matrix-CR.net.

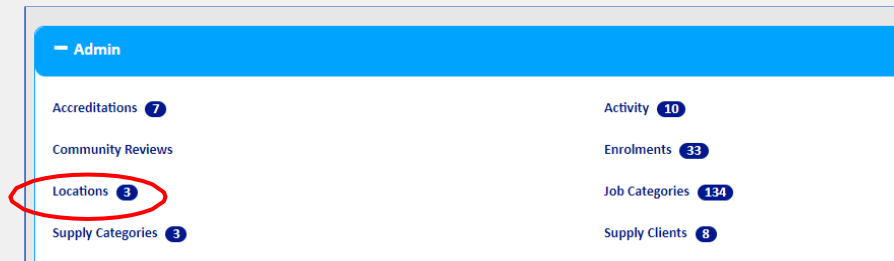
1. Navigate to **'My Company'** sub tab under the **'Admin'** navigational tab, or at the bottom of your Homepage in the Admin Sub Section.
2. Click **'Actions'**, **'New Location'**:



3. Complete the fields with the branch location details:

A screenshot of the 'New Location' form in the Matrix-CR.net Admin interface. The form contains the following fields: 'Location Display Name' (Springview), 'Address Line 1' (Clatterbridge Health Park), 'Address Line 2' (Clatterbridge Road), 'City' (Bebington), 'County' (Camden), 'Address Post Code' (CH63 4JY), 'Country' (United Kingdom), 'Address Phone' (01514827636), 'Tax No.', 'Url', 'Contact' (Georgia Hindry), and 'External'. There are 'Cancel' and 'Next' buttons at the bottom right.

4. Supplier company locations can then be found in Admin section of the **'My Company'** page:



Accreditation

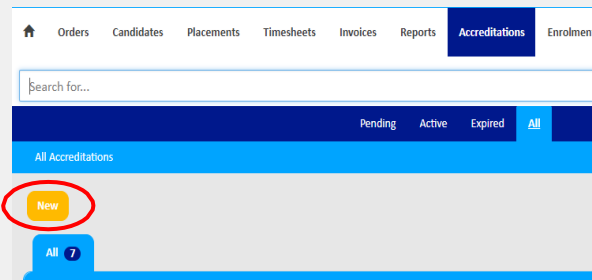
All Suppliers must complete an Accreditation to supply on Matrix-CR.net. Once approved, Suppliers will then be able to submit an Enrolment to supply to a Matrix Client.

Suppliers must complete an Accreditation for each supply category they wish to supply to, i.e agency workers or permanent recruitment.

If you wish to supply to a Matrix SAAS Client, you must also complete a separate Accreditation for each Client.

1. All Accreditations can be found under the Accreditations tab on the Navigation bar


2. To start a new Accreditation, click on the **'New'** button:



3. Choose which supply category and Client you wish to create an Accreditation for.

**Leave the Client field blank if you wish to Accredite for all Matrix MSP Clients. For Matrix SAAS Client's, you must complete an Accreditation for each Client – you will be able to select them on the dropdown Client menu*

4. Click **'Next'** and answer all the listed questions

- At the bottom of the page, upload copies of the requested documents using the  icon and complete the fields for issue and expiry date.

Downloadable Templates

Please use the following downloadable templates where appropriate to submit your documents

Document Type	Template File Name
Supplier Agreement	Matrix CR - Supplier Agreement - 2022-04-05.docx
Director's form	Director's Form .docx
Self Bill Agreement	NEW Matrix SCM Self Bill Agreement 71022 Edit.docx

+ Current Documents

Re-upload Documents

Please upload new versions of the documents below where required. The page above shows the details of the last review and should indicate which documents need to change

Document Type	Old File Name	New File Name
Director's form		<input type="text"/> B
Director's Passport		<input type="text"/> B
Employers Liability		<input type="text"/> B
Professional Indemnity		<input type="text"/> B
Public Liability		<input type="text"/> B
Reference		<input type="text"/> B
Self Bill Agreement		<input type="text"/> B
Supplier Agreement		<input type="text"/> B

Cancel
Submit

Template documents can be downloaded from the Hyperlinks under the Downloadable Templates section on the page:

- Confirm to the Matrix terms and conditions and submit the Accreditation for review:

By Clicking submit you are agreeing to the Matrix-SCM terms and conditions of Accreditation.

I Agree That I Am Certified To Accept Responsibility For Submitting This Documentation On Behalf Of My Company

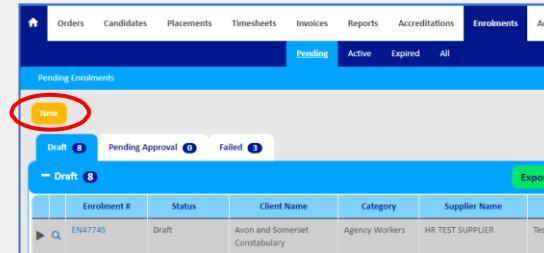
Cancel
Submit



Enrolment

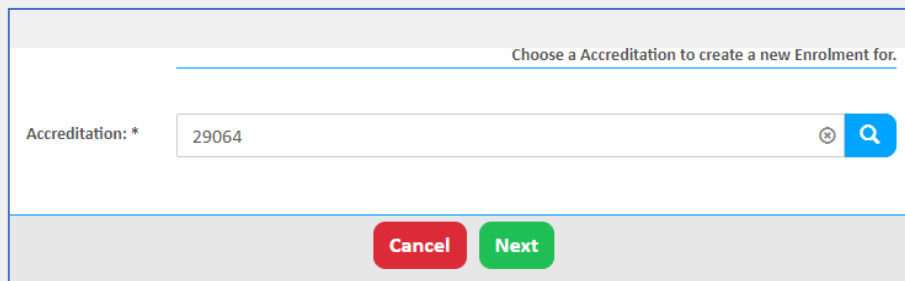
Suppliers must also complete an Enrolment to supply to a Matrix Client.

Suppliers must complete a separate Enrolment for each Client they wish to supply to, and for each Supplier location that wishes to supply to that Client.

1. All Enrolments can be found under the Enrolments tab on the Navigation bar.
2. To start a new Enrolment, click on the **'New'** button:



3. Use the  icon to search for the Accreditation you wish to create a new Enrolment for, select the Accreditation via the  icon:



The screenshot shows a form titled 'Choose a Accreditation to create a new Enrolment for.' with a search input field containing '29064' and a magnifying glass icon. Below the input field are 'Cancel' and 'Next' buttons.



The screenshot shows a search results table with columns for Accreditation #, Status, Client Name, Category, and HR TEST. The table contains three rows of results. Below the table is a 'Showing all items.' button.

Accreditation #	Status	Client Name	Category	HR TEST
▶ AC30506	Approved		Permanent Recruitment	HR TEST
▶ AC29507	Approved	Cambridgeshire County Council	Agency Workers	HR TEST
▶ AC29064	Approved		Agency Workers	HR TEST

- Select the Client you wish to create the Enrolment for, and which Supplier Location the Enrolment will be for:

Client: * Hackney Council

Supplier Location: * HR TEST SUPPLIER - Milton Keynes

Buttons: Cancel, Next

- If you are enrolling to a client who have non-Vatable roles, the types of roles you will receive and can supply i.e., Vatable or VAT exempt, will be determined by your Companies VAT registration status. For example, a Non-VAT Registered supplier will only be able to supply VAT exempt roles. If your Company is VAT Registered, you will have the choice to select which types of roles you can supply as shown below. Once selected, click **Next** to continue the enrolment process. Please be aware Matrix are unable to advise on which option you should pick.

Client: * VAT Exempt Testing HR

Supplier Location: * seconddemoval - Location A

Vat Role Type: Roles subject to VAT

Buttons: Cancel, Next

- Upload a completed and signed copy of the Client Supplier Addendum using the icon. A template can be downloaded from the 'Download Documents' section on the page.

- Select which job categories within the Client you wish to supply to by clicking on **'Find more items...'**, ticking the categories, clicking on **'Add'** and then **'Done'**:

Job Categories

Click "Find More Items" to add additional Job Categories to this Enrolment.

Drivers (Care)

Buttons: Find more items..., Refresh List

Buttons: Find, Add, Add All, Done

Job Category	Supply Category	Display
<input checked="" type="checkbox"/> Drivers (Care)	Agency Workers	<input checked="" type="checkbox"/>

Showing all items.



- Click **'Finish'** to submit the Enrolment for review.

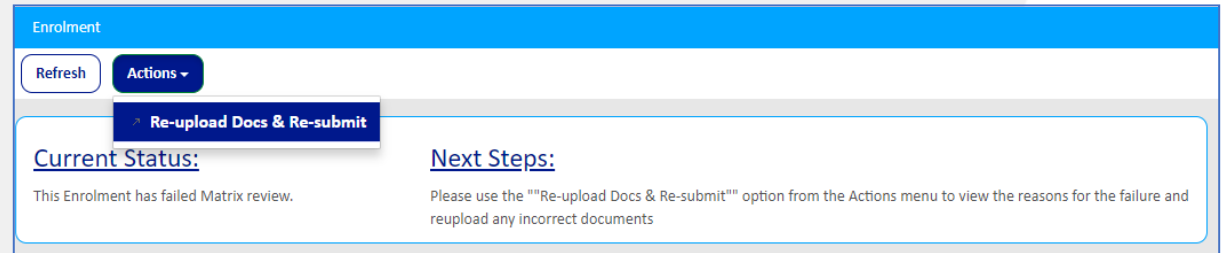
If you need to change the VAT status of your company, please contact the Matrix Supplier Engagement Team and Matrix Admin Finance Team. If you need to change the types of roles you are supplying i.e., would like to supply all roles not only Vatable roles, please contact the Matrix Supplier Engagement Team. Be aware Matrix are unable to advise on the types of roles you should supply i.e., Vatable or Non-Vatable.

If you are supplying a Client with Non-Vatable Roles, you will be required to approve your supplier self-bill each Wednesday. Failure to approve will result in delays of payment.

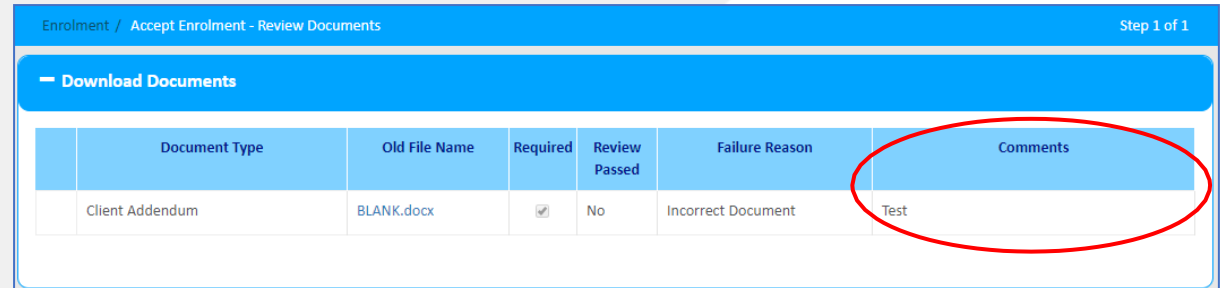
Resubmitting a Failed Review

All Accreditations and Enrolments will be reviewed on Matrix-CR.net. If an Accreditation or Enrolment is failed for any reason, you will receive an email notification and an opportunity to update the failed documents.

1. Use the  icon to click into the failed Accreditation or Enrolment from the relevant tab on the Navigation bar
2. Click **'Actions'**, **'Re-upload Docs & Re-submit'** to view the reasons for failure and to upload the correct documents:
3. Re-upload the correct documents using the  icon and re-submit for review.



The screenshot shows the 'Enrolment' page. At the top, there is a 'Refresh' button and an 'Actions' dropdown menu. The 'Actions' menu is open, and 'Re-upload Docs & Re-submit' is highlighted. Below the menu, there are two sections: 'Current Status:' and 'Next Steps:'. The 'Current Status:' section states 'This Enrolment has failed Matrix review.' The 'Next Steps:' section provides instructions: 'Please use the ""Re-upload Docs & Re-submit"" option from the Actions menu to view the reasons for the failure and reupload any incorrect documents.'



The screenshot shows the 'Download Documents' table. The table has the following columns: Document Type, Old File Name, Required, Review Passed, Failure Reason, and Comments. The 'Comments' column is circled in red. The table contains one row of data:

Document Type	Old File Name	Required	Review Passed	Failure Reason	Comments
Client Addendum	BLANK.docx	<input checked="" type="checkbox"/>	No	Incorrect Document	Test

Contents

[Creating a Candidate User Profile](#)

[Removing a Candidate User Profile](#)

[Order Review](#)

[Accepting and Declining Orders](#)

[Order Messaging](#)

[Submitting a Candidate](#)

[Withdraw or Cancel a Submitted Candidate](#)

[Adding or Removing Shifts on Candidate Submission](#)

[Requesting Shifts on Active Placements](#)

[Approving Shift Requests from Managers](#)

[Relevant 'Other Items' on Shift Orders](#)

[Managing Interview Requests](#)



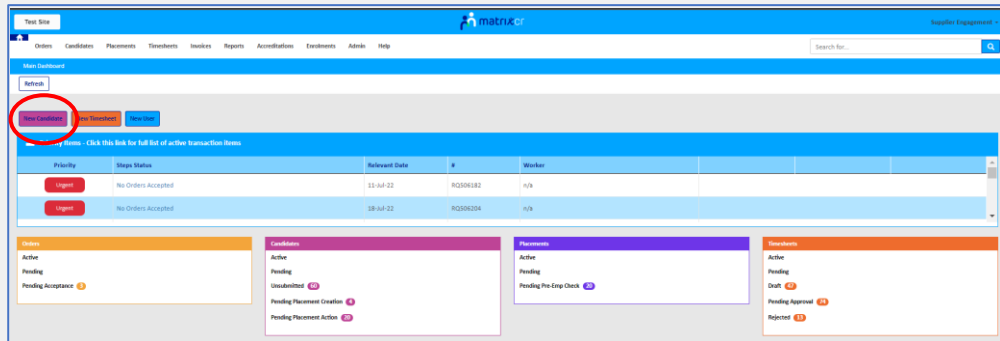
Order Review and Candidate Submission

Creating a Candidate User Profile

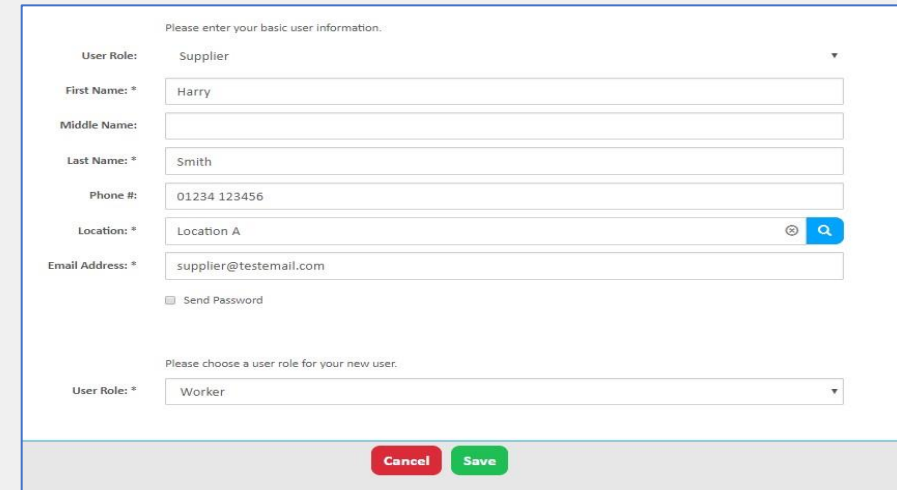
Each of your available Candidates must have a user profile within your Matrix-CR.Net system to be able to be submitted to an Order. The Candidate's profile only needs to be added once and will then be saved for future Candidate submissions.

Suppliers have the ability to allow their Candidate's to have their Matrix- CR.Net login details, giving them access to their Placements and submit their own Timesheets when they are working as part of a Placement. Alternatively, Suppliers can submit Timesheets on behalf of the Candidate.

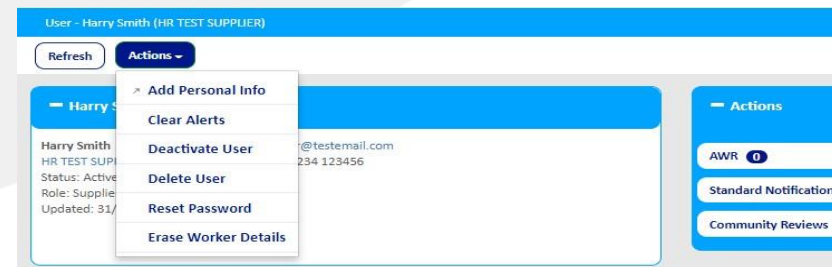
1. From the homepage, click on the **'New User'** button or navigate to the Users section under the **'Admin'** tab on the Navigation bar:





2. Fill in the required fields with your Candidate's details, and click **'Save'**:

A screenshot of the 'New User' form in Matrix-CR.Net. The form is titled 'Please enter your basic user information.' and contains the following fields: 'User Role' (dropdown menu set to 'Supplier'), 'First Name' (text box with 'Harry'), 'Middle Name' (text box), 'Last Name' (text box with 'Smith'), 'Phone #' (text box with '01234 123456'), 'Location' (text box with 'Location A' and a search icon), 'Email Address' (text box with 'supplier@testemail.com'), and 'Send Password' (checkbox). Below these fields, there is another dropdown menu for 'User Role' set to 'Worker'. At the bottom of the form, there are 'Cancel' and 'Save' buttons.

3. You can load and update your Candidate's personal details by going to **'Actions'**, **'Add Personal Info'** and completing the requested information. This information will be applied when submitting your Candidate to an order:



4. On the Candidate's profile page, you can upload compliance documents to automatically load to a submission by scrolling down to Documents and clicking on . Fill in the relevant details and use  to upload the relevant file:



The screenshot shows a form for uploading a document. It includes the following fields:

- Document Type: * CV
- Object: Candidate
- File Name: * Worker CV.rtf
- Issue Date: 02/08/2018
- Issue Number: 001

At the bottom of the form, there are two buttons: **Cancel** (red) and **Save** (green).

5. If you have provided your Candidate access to Matrix-CR.net, the user details (including email address and contact number) can be updated by clicking on the user name header to open the User profile details:



The screenshot shows the user profile details for Harry Smith (HR TEST SUPPLIER). The user name header is circled in red. The details include:


- Harry Smith
- HR TEST SUPPLIER
- Status: Active
- Role: Supplier
- Updated: 31/07/2018 14:11
- Email: supplier@testemail.com
- Telephone: 01234 123456
- Last Login:

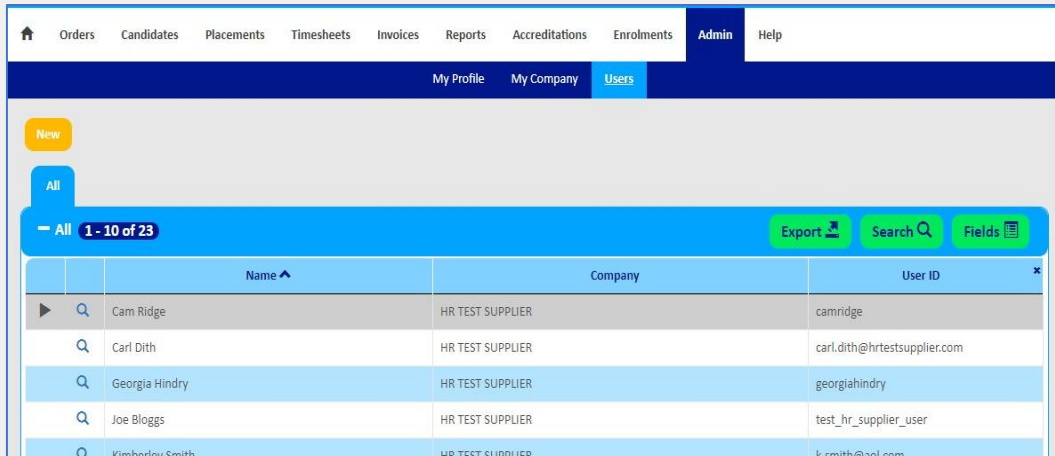
6. Scroll down the page to the editable fields
7. Click **'Save'** at the top of the page to update the Candidate's User details
8. To reset a Candidate's password, choose the **'Reset Password'** option from the **'Actions'** button on the Candidate's User summary page

Removing a Candidate User Profile

You can erase worker details, or deactivate or delete a Candidate's User profile at any time.

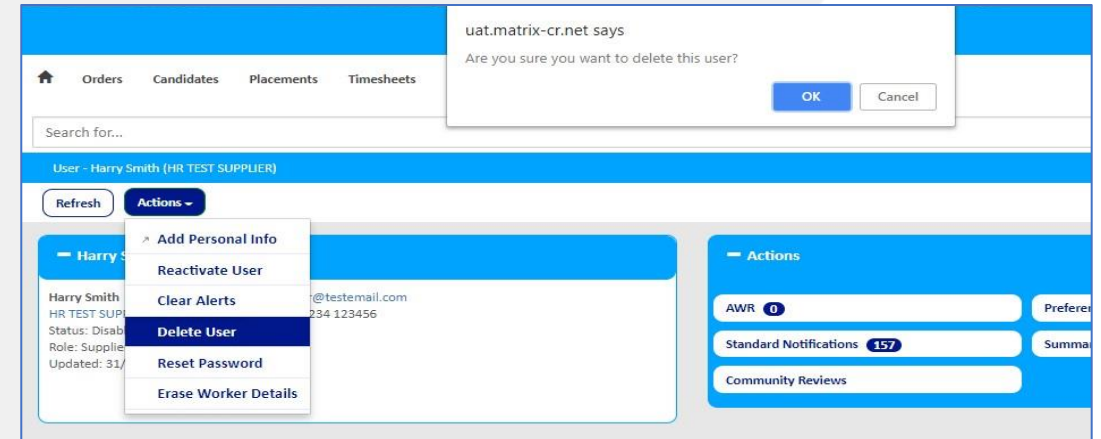
Note: If the Candidate has any active submissions or Placements on Matrix-Cr.net this will not automatically cancel these.

1. Use the  icon to click into the User profile of the Candidate you would like to remove, either from the **'Admin'** tab on the Navigation bar, or from the Users list at the bottom of the homepage
2. Choose the relevant option from the **'Actions'** button and follow the prompt at the top of the page:



The screenshot shows the 'Admin' section of the Matrix-Cr.net interface, specifically the 'Users' tab. A table lists several users, with the first row highlighted. The table has columns for Name, Company, and User ID.

Name	Company	User ID
Cam Ridge	HR TEST SUPPLIER	camridge
Carl Dith	HR TEST SUPPLIER	carl.dith@hrtestsupplier.com
Georgia Hindry	HR TEST SUPPLIER	georgiahindry
Joe Bloggs	HR TEST SUPPLIER	test_hr_supplier_user
Kimberley Smith	HR TEST SUPPLIER	k.smith@aol.com



The screenshot shows the user profile page for 'Harry Smith (HR TEST SUPPLIER)'. The 'Actions' dropdown menu is open, showing options: Add Personal Info, Reactivate User, Clear Alerts, Delete User, Reset Password, and Erase Worker Details. A confirmation dialog box is displayed at the top, asking 'Are you sure you want to delete this user?' with 'OK' and 'Cancel' buttons.

Order Review

As an enrolled supplier, you will receive an email notification when a new order has been submitted by a Client.

1. Navigate to the Order, either by following the link on the email notification or Priority Item notification on the Homepage, or by visiting the 'Orders' tab on the Navigation bar:

The screenshot shows the 'Orders' page with a navigation bar at the top containing 'Orders', 'Candidates', 'Placements', 'Timesheets', 'Invoices', 'Reports', 'Accreditations', 'Enrolments', 'Admin', and 'Help'. Below the navigation bar, there are tabs for 'Pending', 'Active', and 'All'. The 'Pending' tab is selected, and a sub-tab 'Pending Acceptance' shows 26 items. A table displays the following data:

#	Supplier	Client	Job Title	Date Submitted	Accept/Decline
RQ317235	HR TEST SUPPLIER - Location A	Armagh City, Banbridge and Craigavon Borough Council	Administration Assistant	19/07/2018 11:37	Accept/Decline
RQ317234	HR TEST SUPPLIER - Location A	Armagh City, Banbridge and Craigavon Borough Council	Administration Assistant	19/07/2018 10:39	Accept/Decline
RQ317232	HR TEST SUPPLIER - Location A	Armagh City, Banbridge and Craigavon Borough Council	Administration Assistant	19/07/2018 10:26	Accept/Decline
RQ316937	HR TEST SUPPLIER - Test	Swindon Borough Council	Information Guide	10/07/2018 16:43	Accept/Decline
RQ316812	HR TEST SUPPLIER - Test	Swindon Borough Council	Waste Driver/Collector	10/07/2018 12:20	Accept/Decline
RQ316806	HR TEST SUPPLIER - Test	Swindon Borough Council	Waste Collector	10/07/2018 12:13	Accept/Decline

2. Use the magnifying glass icon to open the Order summary page, where you will be able to review the details of the role and any required candidate compliance and attributes:

The screenshot shows the Order summary page for Order # RQ316937 (Status: Open). The page is divided into several sections:

- Order Details:**
 - Order #: RQ316937
 - Category: Agency Workers
 - Job Title: Information Guide
 - Job Category: Admin & Clerical
 - Client: Swindon Borough Council
 - Client Location: Wat Tyler West
 - Justification: Temporary or Seasonal Peak in Workload
 - Estimated Supply Total: £3,948.00
 - Status: Open
 - IR35 Status: Inside IR35
- Client Information:**
 - Client Owner: Wayne Millin
 - Client Manager: Wayne Millin
 - Hours Per Week: 25.00
 - Start Date: 16/07/2018
 - End Date: 15/10/2018
 - Start Time: 09:00
 - End Time: 14:00
- Links:**
 - Printable Detail
 - Interviews Report
- Other Items:**
 - Activity
 - Cost Codes (1)
 - Notes (0)
 - Pre-Employment Documents (0)
 - Questions And Answers (0)
 - Report Map
 - Placements (0)
 - Suppliers (1)
 - Document Sets (0)
 - Skills (10)
 - Locations (1)
 - Candidates (0)
 - Qualifications (4)
 - Rates (0)
 - Order Documents (1)
 - Shortlisted Candidates (0)
 - Subjective Codes (0)
 - IR35 Details
- Required Candidate Documents (1 - 5 of 8):**

Object	Document Type	Document Name	Sort Order	Required
Candidate	CV		1	✓
Candidate	5 Years References		2	✓
Candidate	Confidentiality Agreement		3	✓
Candidate	Criminal Convictions Declaration		4	✓
Candidate	Eligibility to work in the UK		5	✓
- Skills (10):**

Attribute	Value
Ability To Communicate Effectively Both Orally & In Writing To A Wide Range Of People	Intermediate
Self Motivated, Flexible & Resourceful	Intermediate
Ability to use Microsoft packages, in particular Word, Excel and Outlook	Intermediate
Logical thinking with creative problem-solving ability	Intermediate
Trustworthy and reliable	Intermediate
Ability To Work As Part Of A Team And On Own Initiative	Intermediate
Previous experience in similar role	Intermediate
A high level of accuracy and attention to detail	Intermediate
Ability To Organise Own Workload To Meet Targets & Deadlines	Intermediate
Ability To Carry Out Numerical Calculations	Intermediate
- Qualifications/Certifications (4):**

Attribute	Value
GCSE Grade A-C (or equivalent) in English Language and Mathematics	Passed
First Aid Trained	Does not Hold
Member of relevant Professional Body	Does not Hold
Relevant professional level qualification	Does not Hold

Accepting and Declining Orders

You are required to accept or decline new orders to inform the Client of your ability to fulfil the role.

1. From the Order summary page, use **'Actions'** to choose whether to Accept or Decline the Order:

Order - # RQ316937 (Status: Open)

Refresh Actions

Accept / Decline

Current Status:
The order is currently Open to suppliers.

Next Steps:
Review the details of the order and use the green 'Actions' button at the Accept/Decline to inform the client whether it is your intention to respond with a New Candidate/Offer to submit your response to the order.

Order - # RQ316937 (Status: Open) Links

2. Click on the **'Accept/Decline'** link for the relevant Order:

Order - # RQ316937 (Status: Open) / Suppliers (Filtered on Parent) 1

Please select a supplier location to accept this Order for from the list below by clicking the "Accept/Decline" link in the list (Hide)

Refresh Advanced Search Filters Customize

#	Supplier	Client	Status	Date Submitted	Accept/Decline
1	RQ316937 HR TEST SUPPLIER - Test	Swindon Borough Council	Pending Acceptance	10/07/2018 16:4	Accept/Decline

3. Select the Option you wish to proceed with and click **'Save'**:
 - a. Accept the Order as one you will be able to fill, and proceed to submitting a candidate straight away
 - b. Accept the Order but return to the Order page, and submit a Candidate at a later time
 - c. Decline the Order to inform the Client you are unable to submit a Candidate for the Order details requested. This will not affect future order distributions to you.

Accept - Progress To New Candidate
 Accept - Return To Order
 Decline

If you are declining this Order, can you please provide a reason below.

Reason: Unable to meet requirement

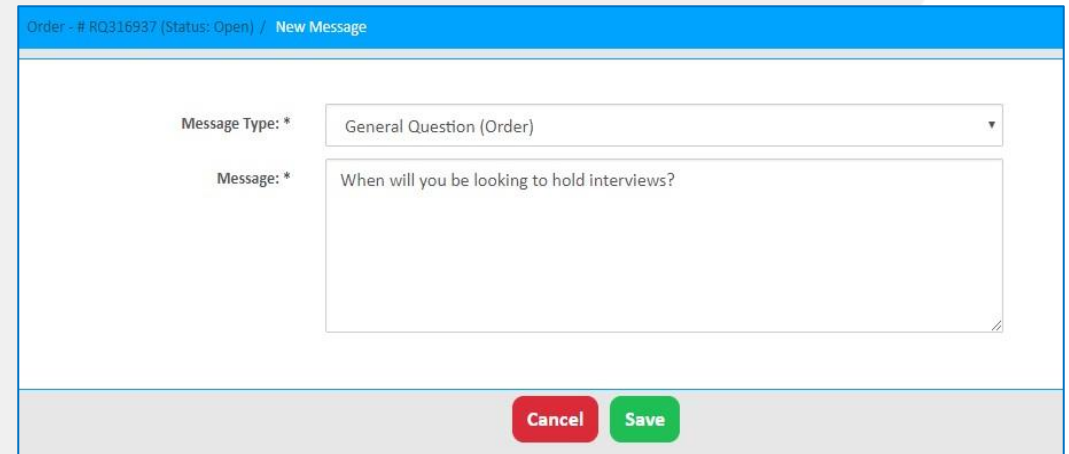
Comments: No candidates available for job title requested.

Cancel Save

Order Messaging

If you have any questions about an Order, you can use the Order messaging function to communicate with the Client.

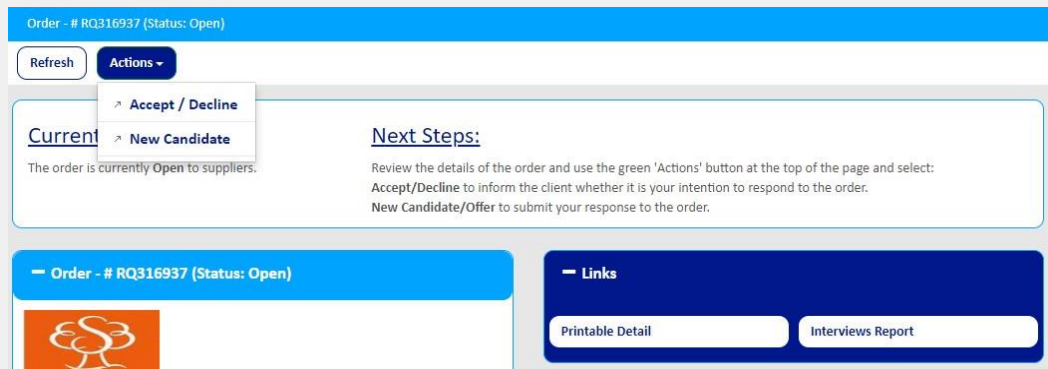
1. The Order messaging tool is at the bottom of the Order summary page. To send a new message, click on **'New'** and type your message in the free type box:



2. When the client responds to the message you will receive an email notification to alert you to the reply, and the answer will be displayed in the messaging section at the bottom of the Order summary page.

Submitting a Candidate

1. Navigate to the Order that you wish to submit a Candidate to. Use the **'Actions'** button on the Order summary page to select the **'New Candidate'** option:



Order - # RQ316937 (Status: Open)

Refresh Actions


Accept / Decline
New Candidate

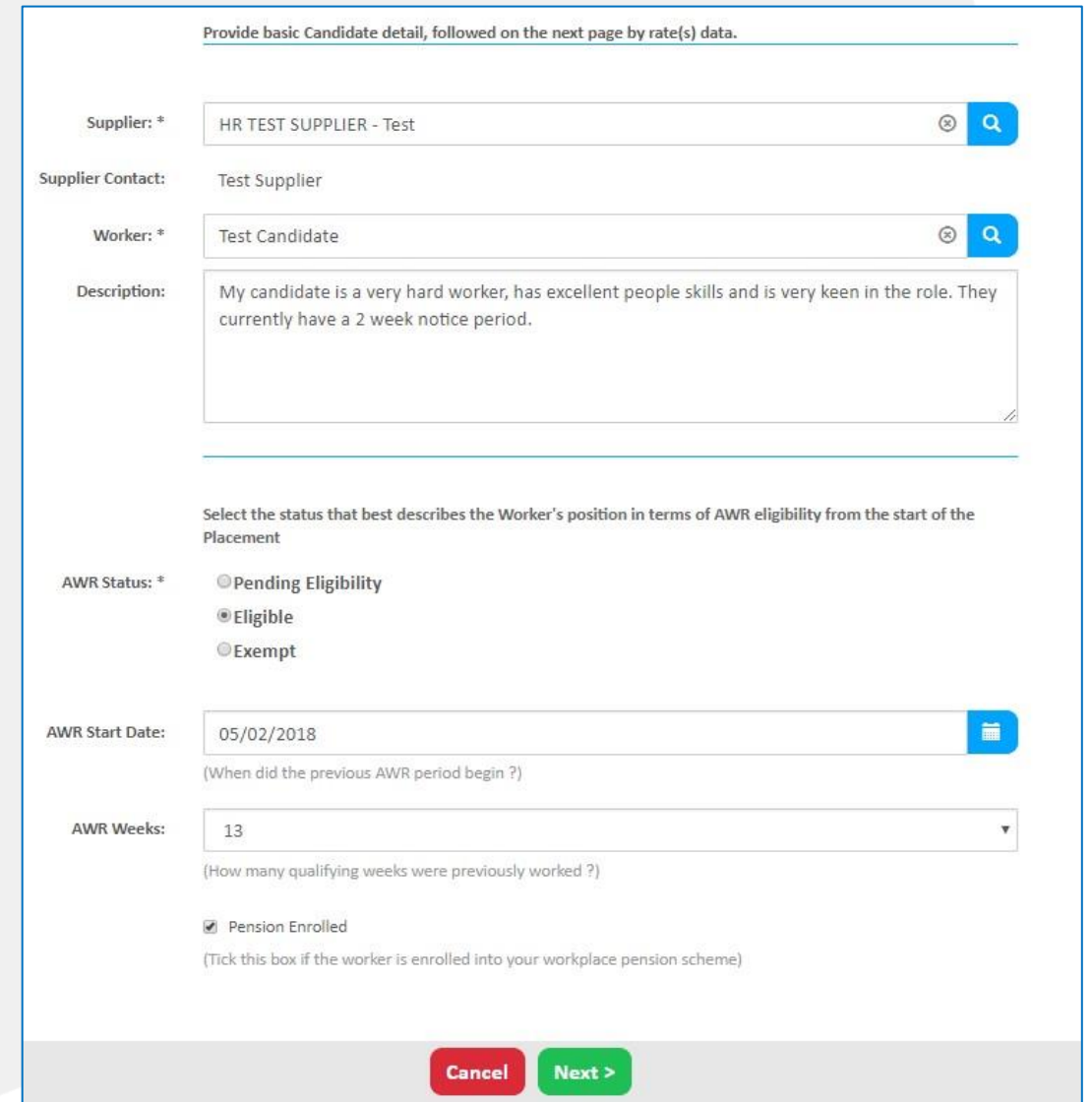
Current
The order is currently Open to suppliers.

Next Steps:
Review the details of the order and use the green 'Actions' button at the top of the page and select: Accept/Decline to inform the client whether it is your intention to respond to the order. New Candidate/Offer to submit your response to the order.

Order - # RQ316937 (Status: Open)

Links
Printable Detail Interviews Report

2. Select the candidate you would like to submit to the order using the  icon and complete the requires fields.
3. Complete the required fields with the requested personal details (if required). You may notice that some or all of these fields have been pre-populated with the information from the Candidate's User profile.



Provide basic Candidate detail, followed on the next page by rate(s) data.

Supplier: * HR TEST SUPPLIER - Test

Supplier Contact: Test Supplier

Worker: * Test Candidate

Description: My candidate is a very hard worker, has excellent people skills and is very keen in the role. They currently have a 2 week notice period.

Select the status that best describes the Worker's position in terms of AWR eligibility from the start of the Placement

AWR Status: *
 Pending Eligibility
 Eligible
 Exempt

AWR Start Date: 05/02/2018
(When did the previous AWR period begin ?)

AWR Weeks: 13
(How many qualifying weeks were previously worked ?)

Pension Enrolled
(Tick this box if the worker is enrolled into your workplace pension scheme)

Cancel Next >

- Respond to the required Candidate attributes with your Candidate's level against each skill and qualification listed using the drop down options; and respond to any screening questions that have been asked:

Skills


Skills required for this Candidate

Attribute	Value *
Ability To Communicate Effectively Both Orally & In Writing To A Wide Range Of People	Intermediate ▼
Self Motivated, Flexible & Resourceful	Beginner ▼
Ability to use Microsoft packages, in particular Word, Excel and Outlook	Advanced ▼
Logical thinking with creative problem-solving ability	Intermediate ▼
Trustworthy and reliable	Intermediate ▼
Ability To Work As Part Of A Team And On Own Initiative	Intermediate ▼
Previous experience in similar role	Beginner ▼
A high level of accuracy and attention to detail	Advanced ▼
Ability To Organise Own Workload To Meet Targets & Deadlines	Beginner ▼
Ability To Carry Out Numerical Calculations	Advanced ▼

Qualifications / Certifications









Qualifications required for this Candidate

Attribute	Value *
First Aid Trained	Passed ▼
GCSE Grade A-C (or equivalent) in English Language and Mathematics	▼
Member of relevant Professional Body	▼
Relevant professional level qualification	▼

- Upload the required compliance documents for your candidate by using the  button and adding any applicable comments. You may notice that some or all of these documents have been pre-populated with the documents uploaded to the candidates user profile.

Pre-Employment Documents

Upload the required Pre-Employment Document(s) for this Candidate

Document Type	Document Name	Supplier Comment	Required
Photo ID	Blank.docx 	<input type="text"/>	True
National Insurance Number	Passport 1.jpg 	<input type="text"/>	True
Matrix Right to Work Form	Clearance 2.jpg 	<input type="text"/>	True
Eligibility to work in the UK	BLANK.docx 	<input type="text"/>	True
CV	Blank.docx 	Agency CV <input type="text"/>	True
Criminal Convictions Declaration	Blank.docx 	<input type="text"/>	True
Confidentiality Agreement	Blank.docx 	<input type="text"/>	True
5 Years References	test.docx 	References from Jan 2013 - July 2018 <input type="text"/>	True

- If any information is missing, Matrix-CR.net will flag this in the Progress section of the Candidate submission page. To update the missing information, click on the heading where a red cross is shown and complete the fields:

Candidate - # OF1068396 (Status: Unsubmitted)

Refresh Actions

Current Status: This is Unsubmitted

Next Steps: If you wish to submit please complete the relevant information and upload any required documentation. Use the green 'Actions' button at the top of the page and select:
Cancel if this item is no longer required
Submit to send this to the client (only available when all of the relevant fields have been completed OR Supplier has not already Submitted No. of Candidates allowed for the Order)

Unsubmitted Progress 4

Action	Status	
Have the required safeguarding measures been completed for the uploaded documents?	Incomplete	✘
Have rates been added ?	Completed	✔
Have you supplied values for all Skills?	Completed	✔
Have you supplied values for all Qualifications?	Completed	✔

- If all details are correct, click **'Actions'**, **'Submit'** to submit the Candidate to the Order for the client hiring manager to review:

Candidate - # OF1068396 (Status: Unsubmitted)

Refresh Actions

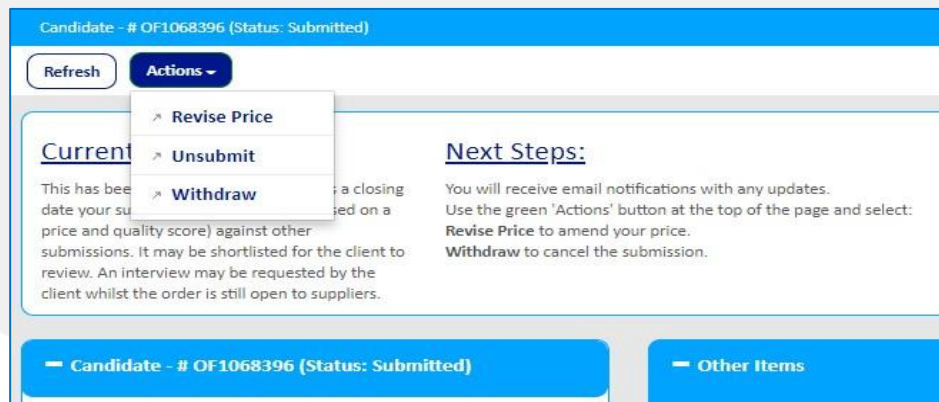
Current Status: This is Unsubmitted

Next Steps: If you wish to submit please complete the relevant information and upload any required documentation. Use the green 'Actions' button at the top of the page and select:
Cancel if this item is no longer required
Submit to send this to the client (only available when all of the relevant fields have been completed OR Supplier has not already Submitted No. of Candidates allowed for the Order)

Cancel
Submit

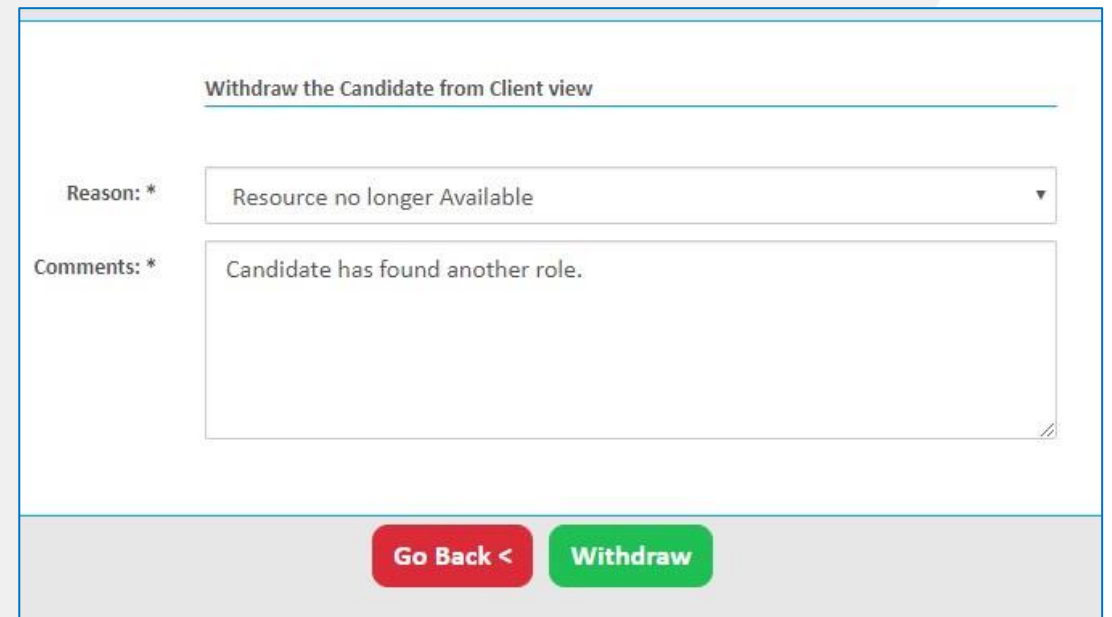
Withdraw or Cancel a Submitted Candidate

1. In **'Unsubmitted'** status, a Candidate submission can be cancelled at any time from the **'Actions'** button.
2. If you need to amend a Candidate submission, select the **'Unsubmit'** option to move the Candidate back into **'Unsubmitted'** status and allow you to amend the details. Whilst a Candidate is in **'Unsubmitted'** status, they cannot be reviewed for a role by the Client.
3. You can withdraw a Candidate from consideration at any time whilst the Order is Open for submissions. Select the **'Withdraw'** option under **'Actions'** to withdraw your candidate.



4. If a candidate is withdrawn, you will need to provide a reason from the drop-down options and further information as to the reason why.

Note: You will not be able to resubmit a withdrawn Candidate.



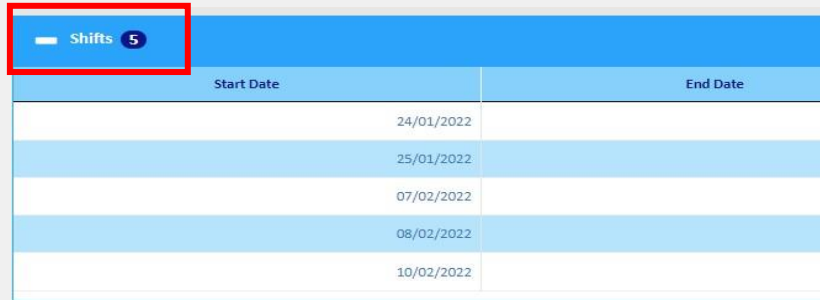
The screenshot shows a form titled 'Withdraw the Candidate from Client view'. It has two main sections: 'Reason: *' and 'Comments: *'. The 'Reason' section has a dropdown menu with the selected option 'Resource no longer Available'. The 'Comments' section has a text area with the text 'Candidate has found another role.' Below the form, there are two buttons: a red 'Go Back <' button and a green 'Withdraw' button.

Adding or Removing Shifts on Candidate Submission

If you wish to add or remove shifts from a candidate submission before they have been reviewed by the client, you must put your candidate back to 'Unsubmitted' status via the 'Actions' button as outlined previously. When your candidate is in 'Unsubmitted' status, you are able to remove or add shift requests from the order if the candidate's availability has changed since the original submission.

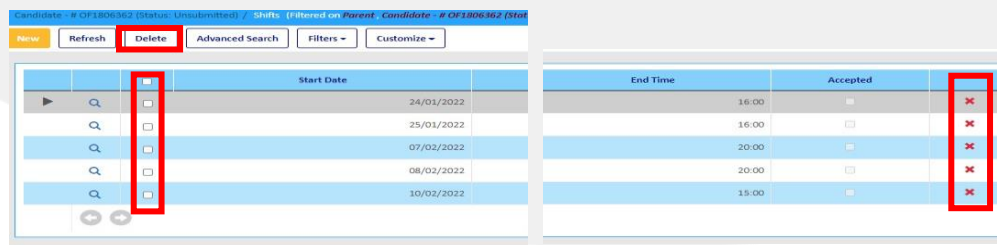
Removing Shifts from Candidate Submission

- Once the candidate is in unsubmitted status, navigate to the 'Shifts' section on their candidate profile:



Start Date	End Date
24/01/2022	
25/01/2022	
07/02/2022	
08/02/2022	
10/02/2022	

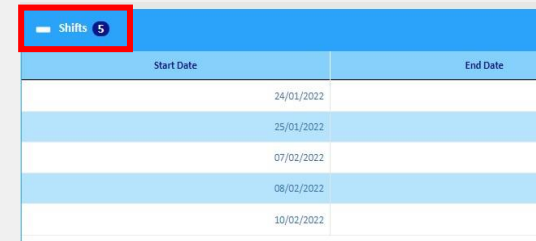
- To remove shifts, click the tick boxes of the shifts needing to be removed and select 'Delete'. Alternatively, you can click the red cross to the right-hand side of the shift in question. Once finished amending shifts, submit your candidate for client review via the Actions button.



Start Date	End Time	Accepted
24/01/2022	16:00	<input type="checkbox"/>
25/01/2022	16:00	<input type="checkbox"/>
07/02/2022	20:00	<input type="checkbox"/>
08/02/2022	20:00	<input type="checkbox"/>
10/02/2022	15:00	<input type="checkbox"/>

Adding Shifts from Candidate Submission

- Once the candidate is in unsubmitted status, navigate to the 'Shifts' section on their offer page:
- To add shifts, click the 'New' button:




Start Date	End Date
24/01/2022	
25/01/2022	
07/02/2022	
08/02/2022	
10/02/2022	



Start Date	End Date
24/01/2022	
25/01/2022	
07/02/2022	
08/02/2022	
10/02/2022	

- You will then need to select which shifts you want to add via the tick boxes and click 'Finish'. Once finished amending shifts, submit your candidate for client review via the Actions button.

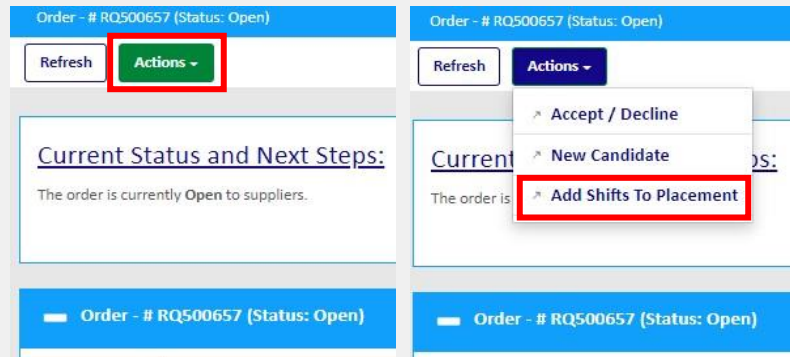


Start Date	End Date
14/02/2022	14/02/2022
22/02/2022	22/02/2022
23/02/2022	23/02/2022
26/02/2022	26/02/2022
27/02/2022	27/02/2022
03/03/2022	03/03/2022
04/03/2022	04/03/2022

Requesting Shifts on Active Placements

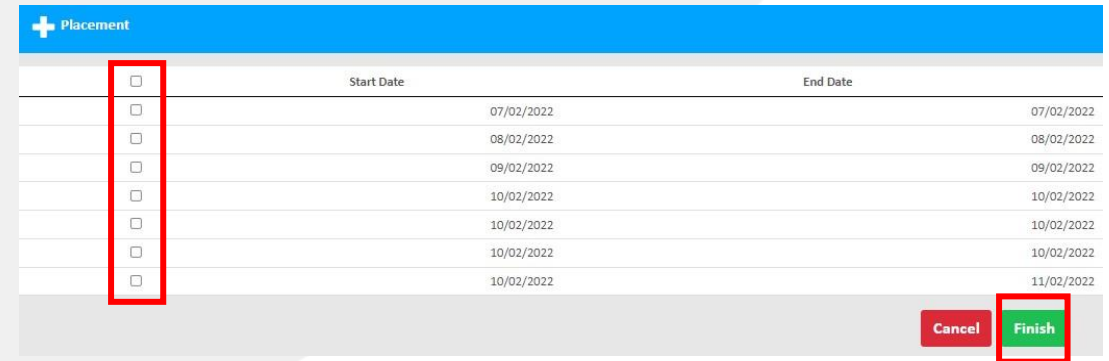
Suppliers have the ability to request shifts for their candidates in Active placement on the system from an open Order. Please be aware the Placement and Order must be linked (the Order the Placement was created through) and shift requests must be made via the Order.

1. Login to the Matrix CR.Net system and navigate to the Order which your candidate has been accepted on and currently has an active placement against.
2. Once in the order, click the **'Actions'** button and select **'Add Shifts To Placement'**.



3. Navigate to the placement you are requesting the shifts for using the placement in question and click save.

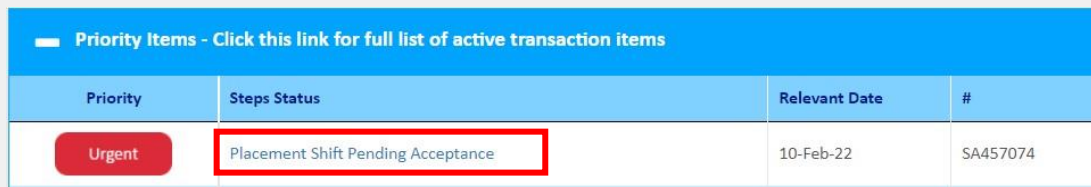
4. Select the shifts you are requesting via the tick boxes on the left of the shift information and click **'Finish'**. The manager will need to approve the shift request before they appear on the placement. If your candidate has worked a shift that is not on the Order please contact Matrix.



Approving Shift Requests from Managers

Managers can request shifts for their candidates in Active Placements on the system from an open Order. If a manager requests your candidate for a shift on an open order, you will need to approve this request.

1. You will be able to see the pending request in your priority items where you can click the hyperlink and be re-directed to the placement in question.



Priority Items - Click this link for full list of active transaction items

Priority	Steps Status	Relevant Date	#
Urgent	Placement Shift Pending Acceptance	10-Feb-22	SA457074

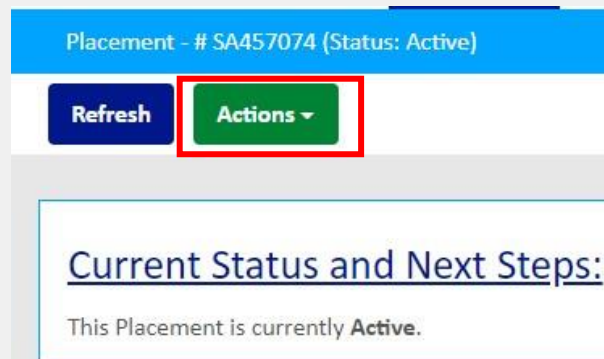
3. Use the tick boxes to select the relevant shifts and click **'Accept'** or **'Decline'**.



<input type="checkbox"/>	Start Date	End Date	Start Day	Start Ti
<input type="checkbox"/>	10/02/2022	11/02/2022	Thursday	

Save Cancel **Accept**

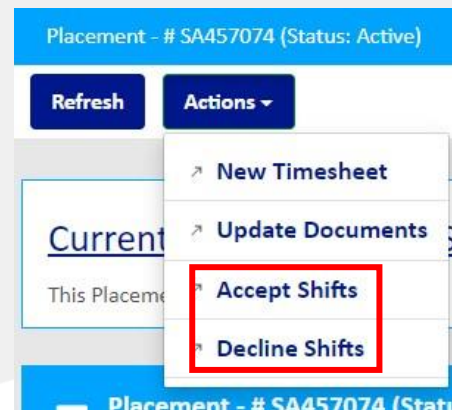
2. Once on the placement, **'Accept'** or **'Decline'** the shifts through the **'Actions'** button.



Placement - # SA457074 (Status: Active)

Refresh **Actions**

Current Status and Next Steps:
This Placement is currently **Active**.



Placement - # SA457074 (Status: Active)

Refresh **Actions**

- New Timesheet
- Update Documents
- Accept Shifts**
- Decline Shifts**

Relevant 'Other Items' on Shift Orders

This section of the guide will highlight relevant boxes under the 'Other Items' section on Shift Orders.

Other Items	
Activity	Skills 7
Cost Codes 1	Locations 1
Notes 0	Notifiers 0
Candidates 0	Pre-Employment Documents 0
Candidate Questions 1	Qualifications 0
Questions And Answers 0	Rates 10
Report Map	Order Documents 1
Placements 0	Placement Shifts 0
Shifts 7	Shifts Calendar View 7
Shortlisted Candidates 0	Suppliers 223
Subjective Codes 0	Document Sets 1

Shifts:

Clicking into this tab will show the full list of open shifts currently against the order. This can be filtered for searching purposes via '[Advanced Search](#)'

Placement Shifts:

Clicking into this tab allows you to see all shifts associated with your placements generated from that specific order. This can be filtered for searching purposes via '[Advanced Search](#)'. This can also be exported to Excel via the '[Actions](#)' button. You can navigate directly to any associated placements by clicking the hyperlinked SA# in column 2.

You are also able to see any shifts which are pending your acceptance or any shifts currently pending manager approval in this section under '[Shift Status](#)'.

Shifts Calendar View:

Clicking this tab allows you to view all shifts – at both an order, and placement level – in a stylized calendar/rota design. The calendar view has interactive elements, and a colour scheme to indicate the status of the displayed shift records (i.e. if shifts are filled, unfilled or pending approval/acceptance).

If you need to cancel any shifts on the system for your candidates, i.e name changes or if the worker is no longer available to carry out the shift, please get in contact with Matrix.

If a manager contacts you directly regarding shift cancellations, please contact Matrix.

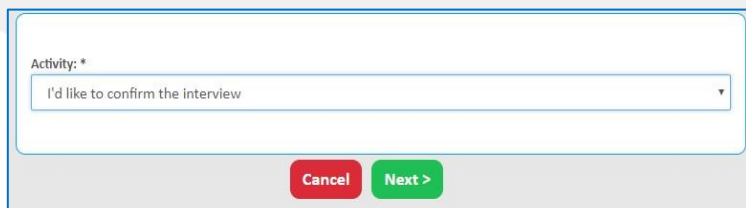
Managing Interview Requests

If a Client is interested in interviewing your Candidate, they will request this through the MatrixCR.net Order. You will receive an email notification when an interview is requested.

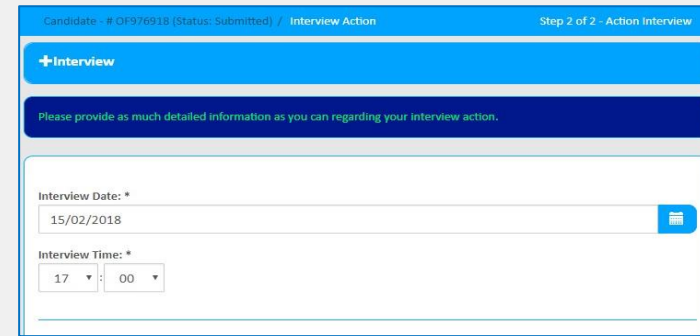
1. Use the email notification, or navigate to the **'Candidates'** tab on the Navigation bar to open the Candidate's submission page. Scroll to the bottom of the page to the Interviews section:



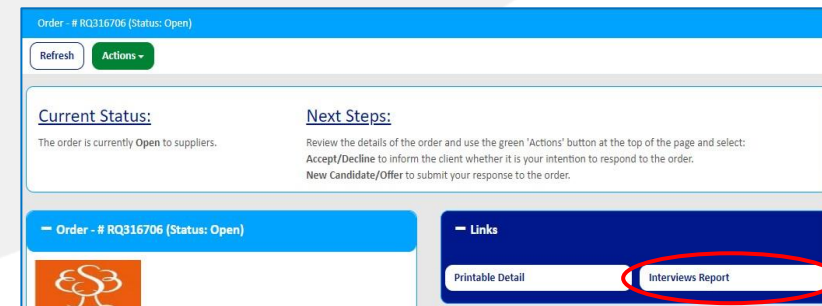
2. Click on **'Action'** and choose your response to the request
 - a. The interview can be confirmed for the date and time requested by the Client. You will be required to submit a comment.
 - b. You can request to rearrange the interview to a date and time that better suits your Candidate.
 - c. The interview request can be cancelled if the Candidate is no longer available. You will be required to submit a comment.



3. If you have chosen to rearrange the interview, you will be asked to submit a new date and time for the interview, and provide any additional information if required:



4. A report detailing the requested interviews with your Candidate's, including the date, time, further information and response, can be downloaded from the Order summary page:



Contents

[Pre-Employment Checks](#)

[Failed and Passed Pre-Employment Checks](#)

[Placement Summary Page and Messaging](#)

[Creating a New Timesheet](#)

[Submitting a New Timesheet](#)

[Adding Expenses](#)

[Uploading Supporting Documents](#)

[Duplicating a Timesheet](#)

[Rejected Timesheets](#)



Placement and Timesheet

Pre-Employment Checks

1. If your Candidate is successful, a Placement will be created by the Client, and you will be notified via email.
2. This Placement will then be checked by a Matrix Customer Success Executive to ensure all your Candidate documents are present and correct.
3. Once created, the Placement will appear under the 'Pending Pre-Employment Checks' status on your portal:

Orders	Candidates	Placements	Timesheets
Active	Active	Active	Active
Pending	Pending	Pending	Pending
Pending Acceptance 3	Unsubmitted 59	Pending Pre-Emp Check 20	Draft 46
	Pending Placement Creation 4		Pending Approval 74
	Pending Placement Action 20		Rejected 13

4. All Placement details can be viewed on the Placement summary page:

Placement - # 5A457867 (Status: Active)

system supplier

Placement # : 5A457867
Job Title : Customer Service Executive
Job Category : Customer Service
Category : Agency Workers
Supplier : HR TEST SUPPLIER - Location A
Client : Asda
Client Location : 4396 - Aylesbury
IR35 Status : Inside IR35
Status : Active
Order # : RQ507792
Candidate # : OF1807679
Placement Justification : Annual Leave Cover

Contract Type : PAVE
Worker : Adam Adam
Supplier Contact : Jess Castle Test Supplier
Client Owner : Greg Davies
Client Manager : Greg Davies

Links

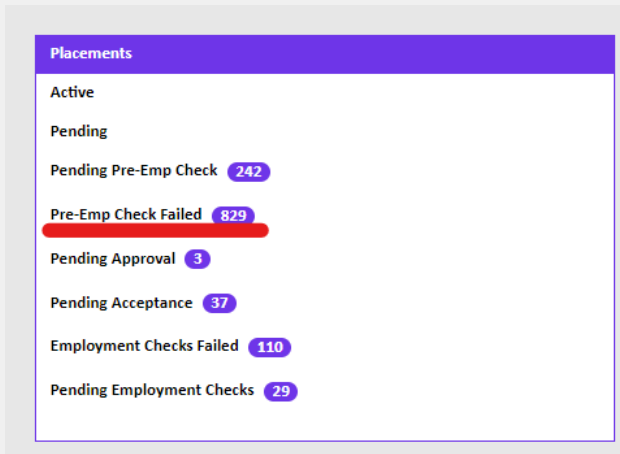
Printable Detail


Other Items


Activity	Documents 2
Notes 0	Rate Ranges 0
Timesheet Item Categories 1	Timesheet Questions 0
Report Map	Order Questions 0
Pre-Employment Document Checks	Document Audits
Worker's Documents	Verification Approvers 0
IR35 Details	

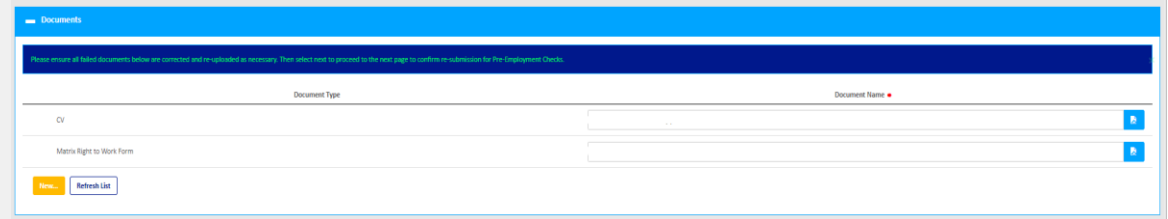
Failed and Passed Pre-Employment Checks

1. If your candidate's placement fails pre-employment checks, you will receive an email notification.
2. To view the placement and the reason for the failure, click on Pre-employment Check Failed section, this will take you to a list of all placements that have failed pre-employment checks.

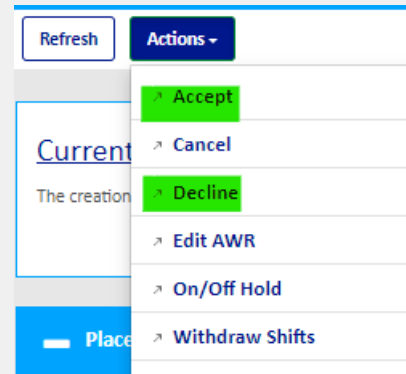


3. To update the failed documents on the placement, click on the  icon, then click on the **Actions** button, and select Re-submit for pre-employment checks.

4. Under the **'Documents'** section, select the  button to upload new/updated documents, then click **Next**, and **Re-Submit**




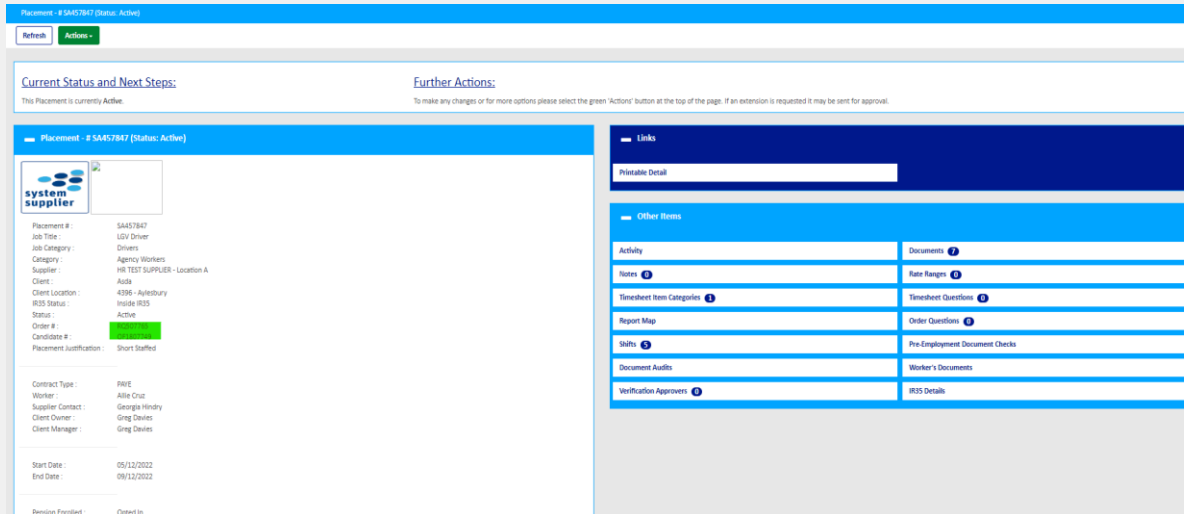
5. If your candidate has passed pre-employment checks, you will receive a system notification and the placement status will change to **'Pending Acceptance'**.
6. You will need to review the placement information and either **'Accept'** or **'Decline'** it.



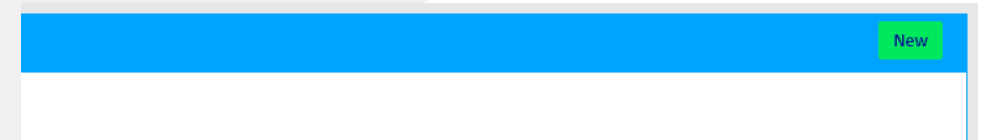
6. **To accept** – Means you are confirming to the Client that you are able to deliver the service as detailed within the Placement and agreeing to all previous terms and conditions stipulated:
To decline – Means you are informing the Client you are unable to provide the service as detailed within the Placement:

Placement Summary Page and Messaging

1. You can review all placement details from the Placement Summary Page. Click on the  icon under the **'Placements'** tab after locating your placement.
2. Links to the client order and the candidate profile can be accessed here:



3. You must review all the information on the placement and ensure it is correct.
4. A messaging tool is available on the portal, where you can raise messages to the client to clarify questions regarding the placement. All messages are between you and the client only and are displayed at the bottom of placement summary page.
5. To raise a new message, scroll to the bottom of the Placement summary page and click **'New'**.

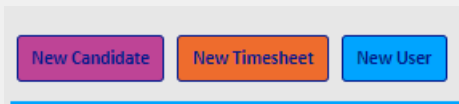




Creating a new Timesheet

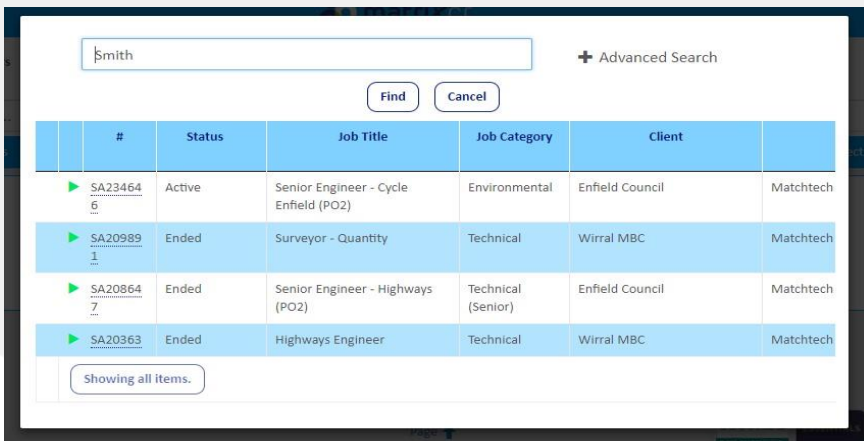
Timesheets can be submitted by an agency worker themselves, or by a Supplier contact on the worker's behalf.

From the Homepage

1. On the Matrix-CR.net homepage, click the **'New Timesheet'** button, or click on the **'New'** button from the Timesheets tab on the Navigation bar:



2. Select the Placement for which you are creating the timesheet by clicking on the  icon and click  to select it.

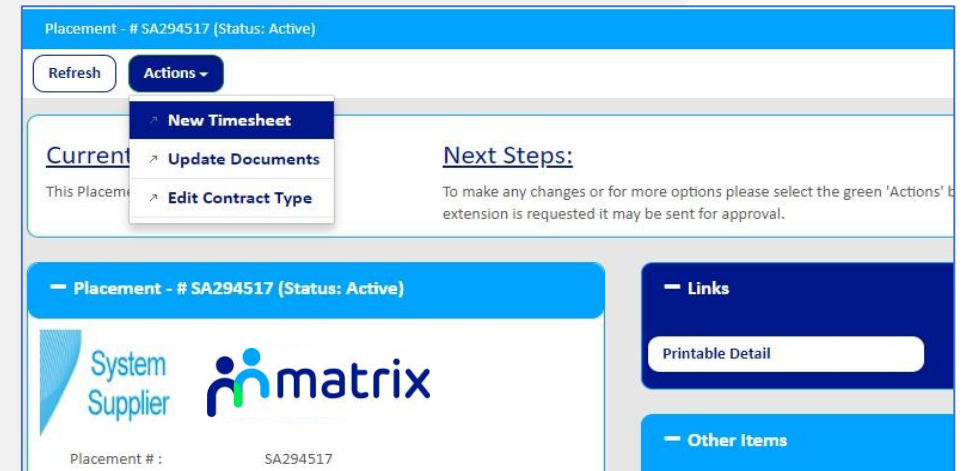


#	Status	Job Title	Job Category	Client	Matchtech
▶ SA23464 6	Active	Senior Engineer - Cycle Enfield (PO2)	Environmental	Enfield Council	Matchtech
▶ SA20989 1	Ended	Surveyor - Quantity	Technical	Wirral MBC	Matchtech
▶ SA20864 7	Ended	Senior Engineer - Highways (PO2)	Technical (Senior)	Enfield Council	Matchtech
▶ SA20363	Ended	Highways Engineer	Technical	Wirral MBC	Matchtech

Showing all items.

From the Placement

1. Navigate to the Placement summary page from the **'Placements'** tab on the Navigation bar
2. Use the **'Actions'** button and select **'New Timesheet'**:



Placement - # SA294517 (Status: Active)

Refresh Actions

- New Timesheet
- Update Documents
- Edit Contract Type

Next Steps:
To make any changes or for more options please select the green 'Actions' button. If an extension is requested it may be sent for approval.

Placement - # SA294517 (Status: Active)

System Supplier matrix

Placement # : SA294517

Links
Printable Detail

Other Items

Submitting a new Timesheet

1. Choose the week end date from the drop-down list for the week you would like to submit a Timesheet for, and click 'Next'. Please note, the week end date is the Sunday.

The screenshot shows the 'New Timesheet' form in a web application. The navigation bar includes 'Orders', 'Candidates', 'Placements', 'Timesheets', 'Invoices', 'Reports', 'Accreditations', 'Enrolments', 'Admin', and 'Help'. The 'Timesheets' tab is active. The form is titled 'New Timesheet' and 'Step 1 of 1 - Basic Details'. Under the 'Placement' section, the following details are displayed: Placement #: SA294517, Job Title: Planning Officer - P112, Job Category: Housing & Planning, Client: Client, Worker: Tom Cannon, and Original End Date: 18/08/2018. Below this, there is a 'New Timesheet' section with a dropdown menu for 'End Date: *' currently set to '05/08/2018'. At the bottom, there are 'Cancel' and 'Next >' buttons.

2. Use the drop-down lists to populate the start and end times of the days worked by the agency worker for that week. Remember to include any breaks taken:

The screenshot shows the 'Timesheet Items' table. The table has columns for Item Category, Item Type, Item Date, Rate Type *, Cost Code *, Start Time, End Time, Break Time, Hours Worked, and Copy. The table contains seven rows of data, one for each day of the week from Monday to Sunday. Each row has a red 'X' icon in the 'Item Category' column. The 'Hours Worked' column shows values: 6.75, 7.50, 7.00, 4.75, and 26.00. At the bottom of the table, there are 'New', 'Save', and 'Refresh List' buttons.

Item Category	Item Type	Item Date	Rate Type *	Cost Code *	Start Time	End Time	Break Time	Hours Worked	Copy
X Hours	Monday	30/07/2018	Regular	P499	09:00	17:00	1 hr :15	6.75	
X Hours	Tuesday	31/07/2018	Regular	P499	08:30	17:15	1 hr :15	7.50	
X Hours	Wednesday	01/08/2018	Regular	P499	09:00	17:00	1 hr :00	7.00	
X Hours	Thursday	02/08/2018	Regular	P499			0 hr :00		
X Hours	Friday	03/08/2018	Regular	P499	12:00	17:30	0 hr :45	4.75	
X Hours	Saturday	04/08/2018	Regular	P499			0 hr :00		
X Hours	Sunday	05/08/2018	Regular	P499			0 hr :00		
								26.00	

3. Use the X icon to delete any rows that are not required.

- Use the copy function to copy the start, end and break times to all days listed. Click on the box under copy against the day that you would like to duplicate across all days to update the Timesheet Items:

Item Category	Item Type	Item Date	Rate Type *	Cost Code *	Start Time	End Time	Break Time	Hours Worked	Copy
Hours	Monday	30/07/2018	Regular	P499	09:00	17:00	1 hr :15	6.75	<input type="checkbox"/>
Hours	Tuesday	31/07/2018	Regular	P499	08:30	17:15	1 hr :15	7.50	<input type="checkbox"/>
Hours	Wednesday	01/08/2018	Regular	P499	09:00	17:00	1 hr :00	7.00	<input type="checkbox"/>

- Add new rows by clicking on 'New' and selecting the day you would like to add, and how many rows you would like to add:

Item Category	Item Type	Item Date	Rate Type *	Cost Code *	Start Time	End Time	Break Time	Hours Worked	Copy
Hours	Monday	30/07/2018	Regular	P499	09:00	17:00	1 hr :15	6.75	<input type="checkbox"/>
Hours	Tuesday	31/07/2018	Regular	P499	08:30	17:15	1 hr :15	7.50	<input type="checkbox"/>
Hours	Wednesday	01/08/2018	Regular	P499	09:00	17:00	1 hr :00	7.00	<input type="checkbox"/>
Hours	Thursday	02/08/2018	Regular	P499			0 hr :00		<input type="checkbox"/>
Hours	Friday	03/08/2018	Regular	P499	12:00	17:30	0 hr :45	4.75	<input type="checkbox"/>
Hours	Saturday	04/08/2018	Regular	P499			0 hr :00		<input type="checkbox"/>
Hours	Sunday	05/08/2018	Regular	P499			0 hr :00		<input type="checkbox"/>

Item Category:
Hours

Click Save in order to add a new Timesheet item to this Timesheet

Item Type: *
Wednesday

Number of Timesheet Items to add: *
2

- If enhanced rates are set up on a Placement (eg Overtime), choose the rate type from the drop down menu against the day worked:

Item Category	Item Type	Item Date	Rate Type *	Start Time	End Time	Break Time	Hours Worked	Copy
Days	Monday	23/07/2018	Bank Holiday	09:00	17:30	1 hr :30	7.00	<input type="checkbox"/>
Days	Tuesday	24/07/2018	Bank Holiday	07:45	14:30	0 hr :45	6.00	<input type="checkbox"/>
Days	Wednesday	25/07/2018	Regular	08:30	16:45	1 hr :00	7.25	<input type="checkbox"/>
Days	Thursday	26/07/2018	Overtime Mon-Sat	09:00	14:00	0 hr :45	4.25	<input type="checkbox"/>
Days	Thursday	26/07/2018	Regular	14:00	18:00	0 hr :00	4.00	<input type="checkbox"/>
Days	Friday	27/07/2018	Regular	14:00	18:00	0 hr :00	4.00	<input type="checkbox"/>
Days	Saturday	28/07/2018	Regular	00:00	00:00	0 hr :00	0.00	<input type="checkbox"/>
Days	Sunday	29/07/2018	Overtime Sunday	09:00	12:30	0 hr :00	3.50	<input type="checkbox"/>

- When all details have been completed, click 'Finish'.
- Choose the option to Confirm and Submit Timesheet to submit for approval, or choose to Return to Timesheet to review the Timesheet details before submitting:

Submit Timesheet to your pre-defined approvers for their approval.

Confirm and Submit Timesheet

Return to Timesheet to review and amend details

Comments:

- The summary page will detail the Timesheet items that you have submitted, along with an overview of the total hours, expenses and values to be submitted for that week:

Timesheet - # SR3932111 (Status: Draft)

System Supplier matrix

Timesheet # : SR3932111
 Job Title : Planning Officer - P112
 Supplier : Matchtech Group Plc - Matchtech
 Client : Client
 Status : Draft
 Placement # : SA294517

Worker : Tom
 Start Date : 16/07/2018
 End Date : 22/07/2018

Total Units : 40.00
 Total Hours : 40.00
 Total Expenses Units : 0.00
 Service Total : £1,155.60
 Ltd Service Total : £1,440.00
 Supply Net Total : £1,506.00
 Supply Gross Total : £1,807.20

Links
 Printable Detail

Other Items
 Activity Documents
 Notes Questions - Supplier

Item Category	Item Type	Date Item	Rate Type	Deliverable	Cost Code	Subjective Code	Units	PAYE Pay Rate	Ltd Pay Rate	Supply Bill	Service Amount	Supply Net	Ltd Service Amount	Start Time	End Time	Break Time
Item Category - Hours 5																
Hours	Monday	16/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	0.50
Hours	Tuesday	17/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	0.50
Hours	Wednesday	18/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	0.50
Hours	Thursday	19/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	0.50
Hours	Friday	20/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	0.50
Subtotal							40.00	£144.45	£180.00	£188.25	£1,155.60	£1,506.00	£1,440.00			2.50
Σ							40.00	£144.45	£180.00	£188.25	£1,155.60	£1,506.00	£1,440.00			2.50

- To submit the Timesheet from the summary page, click **'Actions'**, **'Submit'**:

Timesheet - # SR3932111 (Status: Draft)

Refresh Actions

Current
 This item is

Next Steps:
 Use the green 'Actions' button at the top of the page and select:
 Add Expenses to add expenses.
 Cancel to delete the item.
 Duplicate to copy and use the details for an alternative week ending.
 Edit to make changes to the information currently provided.
 Submit to send to the client for approval.

+ Submission Progress 2

Adding Expenses

1. If the Placement has been set up to allow for expenses to be claimed, Matrix-CR.net will ask if you would like to add expenses when you start to create a new Timesheet:

2. If you need to add expenses on an existing draft Timesheet, click **'Actions'**, **'Add Expenses'** on the Timesheet summary page:

3. Fill in the details of the expenses to be claimed using the boxes and drop down lists, including the day, expense type, unit and description:

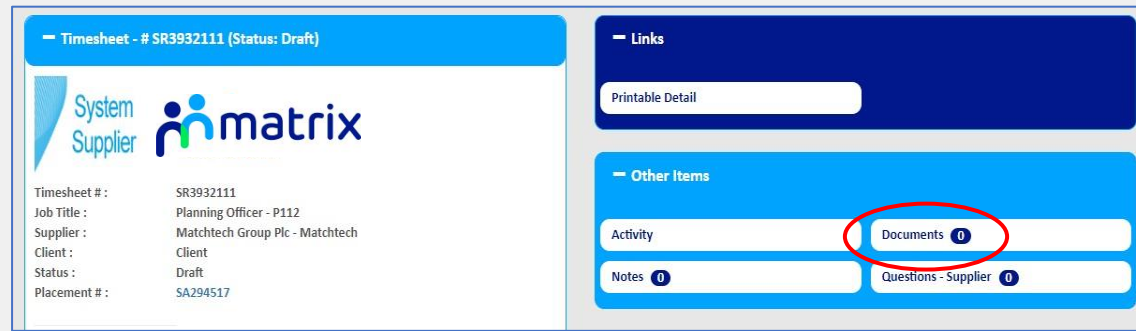
Item Category	Item Type	Item Date *	Rate Type *	Cost Code	Units *	Unit Cost *	Description
Fee (Expenses)	Expense	30/07/2018	Casual Users Mileage	H0250	65	£0.47	Return trip to Town Hall
Fee (Expenses)	Expense	31/07/2018	Casual Users Mileage	H0250	10	£0.14	Trip to town for stationary
Fee (Expenses)	Expense	01/08/2018	Oyster Card - Zones 1	H0250	1	£2.00	Between sites
Fee (Expenses)	Expense	02/08/2018	Oyster Card - Zones 1	H0250	1	£2.50	Travel to Hire car
Fee (Expenses)	Expense	02/08/2018	Casual Users Mileage	H0250	23	£3.50	Hire car - return trip to site


4. Add new rows by clicking on **'New'** and selecting the day you would like to add, and how many rows you would like to add.
5. When all details have been completed, click **'Finish'**.
6. Choose the option 'Confirm and Submit Timesheet' to submit for approval, or choose to **'Return to Timesheet'** to review the Timesheet details before submitting.

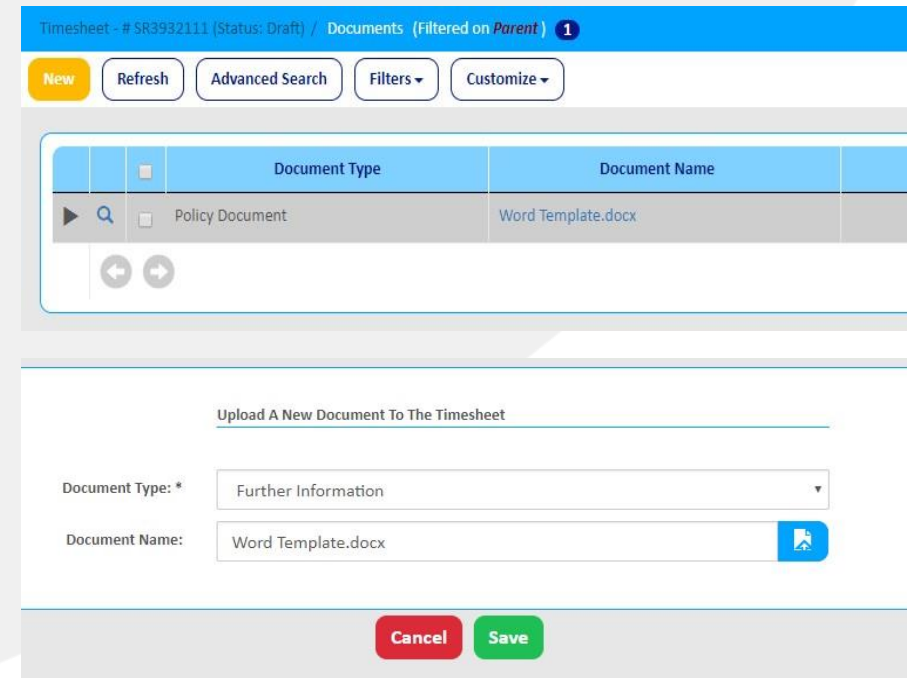
Uploading Supporting Documents

Some clients may request for supporting documents to be uploaded to a Timesheet, such as copies of receipts for expenses claimed.

1. Navigate to the **'Documents'** section under **'Other Items'** on the Timesheet summary page:



2. Click on **'New'** and choose the type of file to upload. Use the  button to search for and upload the correct file:

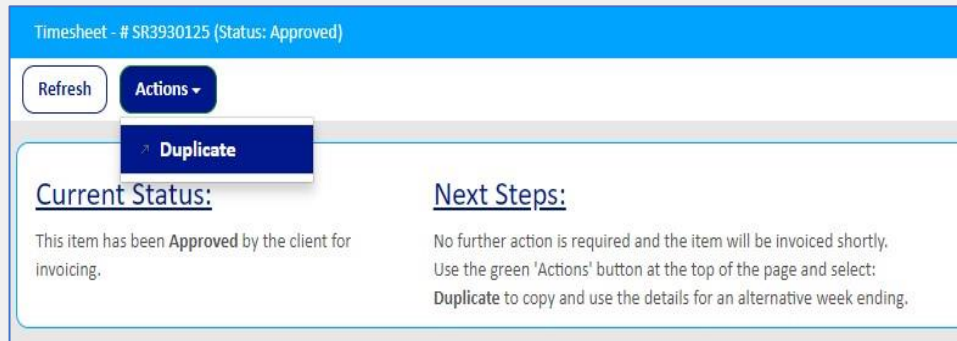


3. You will be taken back to the Timesheet summary page, where you can submit the Timesheet with the uploaded documents.

Duplicating a Timesheet

If an agency worker works a set pattern of hours each week, you can duplicate an existing Timesheet.

1. Navigate into the existing timesheet you would like to duplicate. The Timesheet can be in any status
2. From the **'Actions'** button, click **'Duplicate'**:
3. Select the new week-end date that you would like to duplicate the Timesheet for, using the drop-down list:



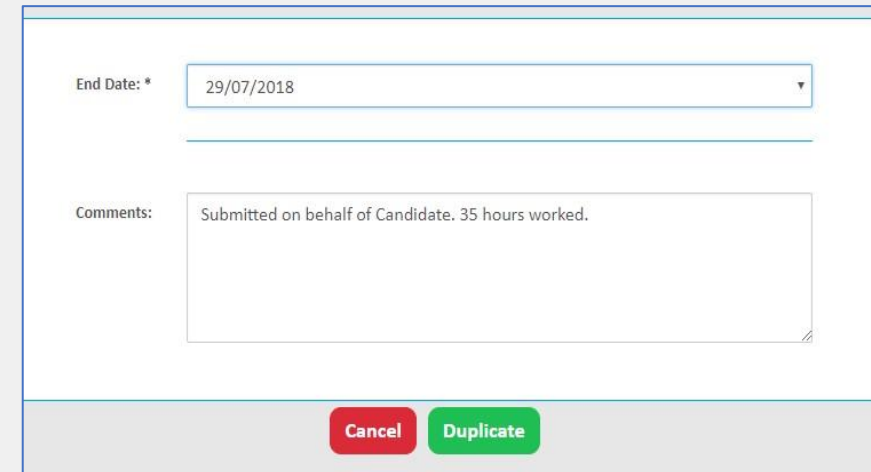
Timesheet - # SR3930125 (Status: Approved)

Refresh Actions

Duplicate

Current Status:
This item has been **Approved** by the client for invoicing.

Next Steps:
No further action is required and the item will be invoiced shortly. Use the green 'Actions' button at the top of the page and select: Duplicate to copy and use the details for an alternative week ending.



End Date: * 29/07/2018

Comments: Submitted on behalf of Candidate. 35 hours worked.

Cancel Duplicate

4. The Timesheet items will be pre-populated from the original timesheet. You will have the option to amend these details if needed
5. Once all the Timesheet items have been input, click **'Finish'** and then **'Submit'** to submit the timesheet for approval.

Rejected Timesheets

Submitted Timesheets will go to the listed client approver to action. The Timesheet will either be approved or rejected, depending on the details that have been submitted. You will receive an email notification once a Timesheet has been actioned.

1. Rejected Timesheets can be found in the Timesheets section on the Homepage, or under **'Pending'** Timesheets from the Navigation bar:

#	Status	Client	Supplier	Service Total	Ltd Pay Rate Total	Supply Gross Total	Worker Name	Level1 Name
SR3813429	Rejected	Swale and Maidstone Borough Council	Matchtech Group Plc - Matchtech	£25.35	£31.60	£231.95	Colin Hale	Maidstone Borough Council
SR3713181	Rejected	Slough Borough Council	Matchtech Group Plc - Matchtech	£0.00	£0.00	£104.90	Raheleh Hosseini	Customer And Community Services
SR3713180	Rejected	Slough Borough Council	Matchtech Group Plc - Matchtech	£50.85	£61.41	£85.56	Raheleh Hosseini	Customer And Community Services
SR3678911	Rejected	Hackney Council	Matchtech Group Plc - Matchtech	£399.84	£516.00	£662.40	Ben Hall	Neighbourhoods and Housing

2. The reasons for the rejected Timesheet are shown in the **'Activity'** section under **'Other Items'** on the Timesheet summary page

Timesheet - # SR3813429 (Status: Rejected)

System Supplier: MAIDSTONE BOROUGH COUNCIL

Swale

Timesheet #: SR3813429
 Job Title: Site Supervisor
 Supplier: Matchtech Group Plc - Matchtech
 Client: Swale and Maidstone Borough Council
 Status: Rejected
 Placement #: SA289314

Worker: Colin Hale
 Start Date: 14/05/2018
 End Date: 20/05/2018

Links: Printable Detail

Other Items:

- Activity** (highlighted with a red circle)
- Adjustments: 2
- Documents: 0
- Notes: 0
- Questions - Supplier: 0

3. You can edit, resubmit or withdraw the Timesheet from the **'Actions'** button on the summary page

Timesheet - # SR3678911 (Status: Rejected)

Refresh Actions

- Duplicate
- Edit
- Re-Submit
- Withdraw

Next Steps:
 Use the green 'Actions' button at the top of the page and select:
Duplicate to copy and use the details for an alternative week ending.
Edit to update before resubmitting.
Re-Submit to return the item for approval.
Withdraw to remove the item.

4. Once edited and resubmitted, the Timesheet will go back to the client approver to review and action.

Notes:

- Matrix-CR.net will automatically raise a zero hour Timesheet if no Timesheet has been created after four weeks. Zero hour timesheets will be automatically submitted and approved; these cannot be amended once actioned.
- If the information on an approved and invoiced Timesheet is incorrect, you will not be able to amend the details.
- Matrix can edit and submit adjustment Timesheets for incorrect or zero hour timesheets at a small fee. To contact the Matrix Operations Team, please raise a query on Matrix-CR.net or contact us in 'Need further support'

Please email Supplier Engagement to request an up-to-date contact sheet for the Customer Success Team:

supplier.engagement@teammatrix.com