matrix
cr.net

Supplier Guide - Agency Workers

matrix

Contents

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

A vacancy or shift requires filling.

New order created or shift added to existing shift order.

Suppliers receive order notification.

Supplier submits candidate for consideration

OR

Requests shift to existing placement.

Hiring manager accepts candidate and placement is created

OR

Hiring Manager approves requested shift to placement.

Timesheets submitted by agency worker.

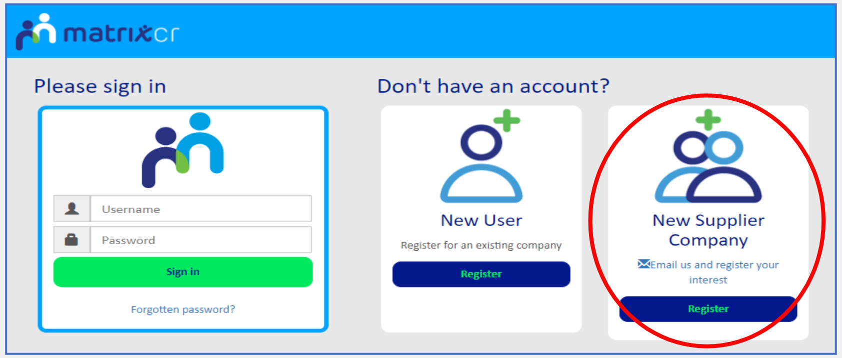
Timesheets approved by Hiring Manager and invoiced to Client.

Registration, Accreditation, and Enrolments

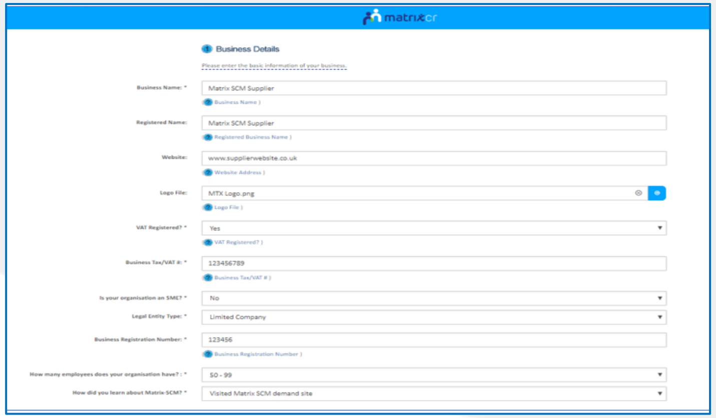
Contents:

Registration

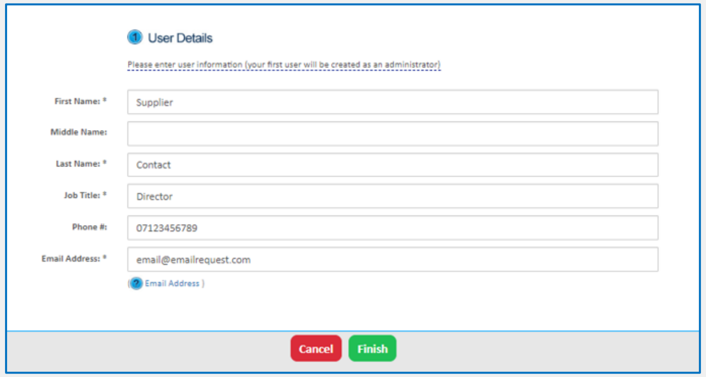
1. Visit www.matrix-cr.net in your internet browser
2. You can register as a new Supplier from the Matrix-CR.net login page:



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



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

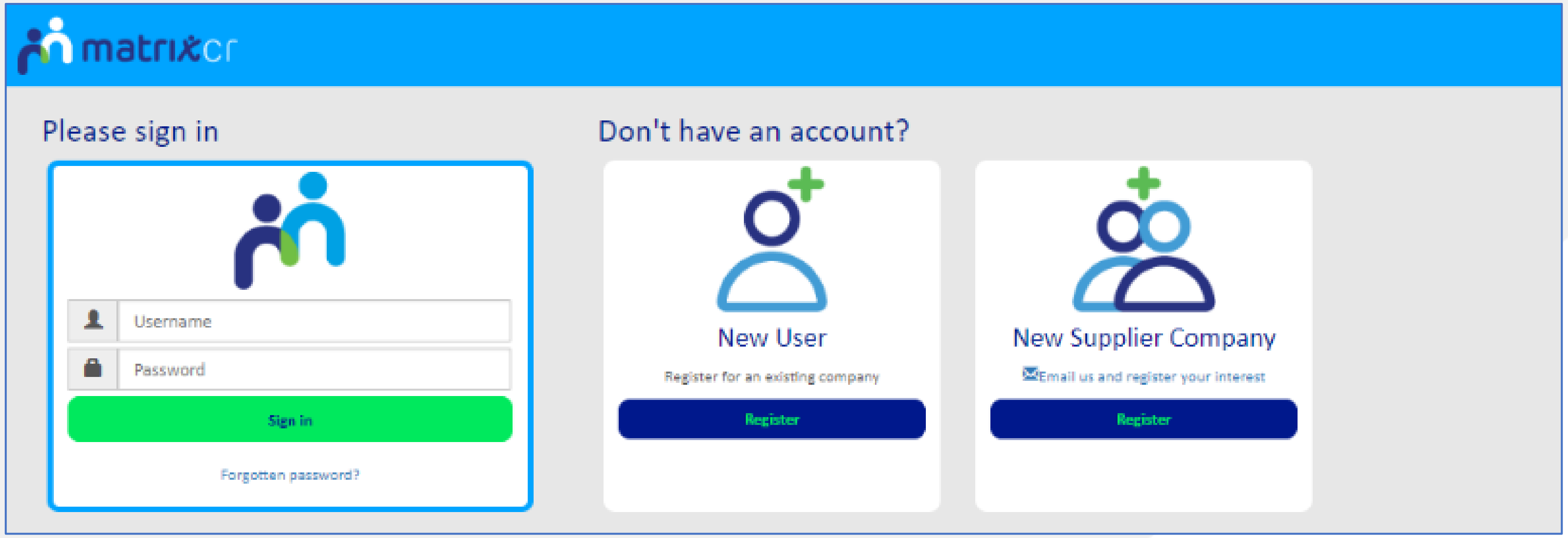


5. Click **'Finish'** to complete the registration process. You will receive your Username and Password via email.

Login

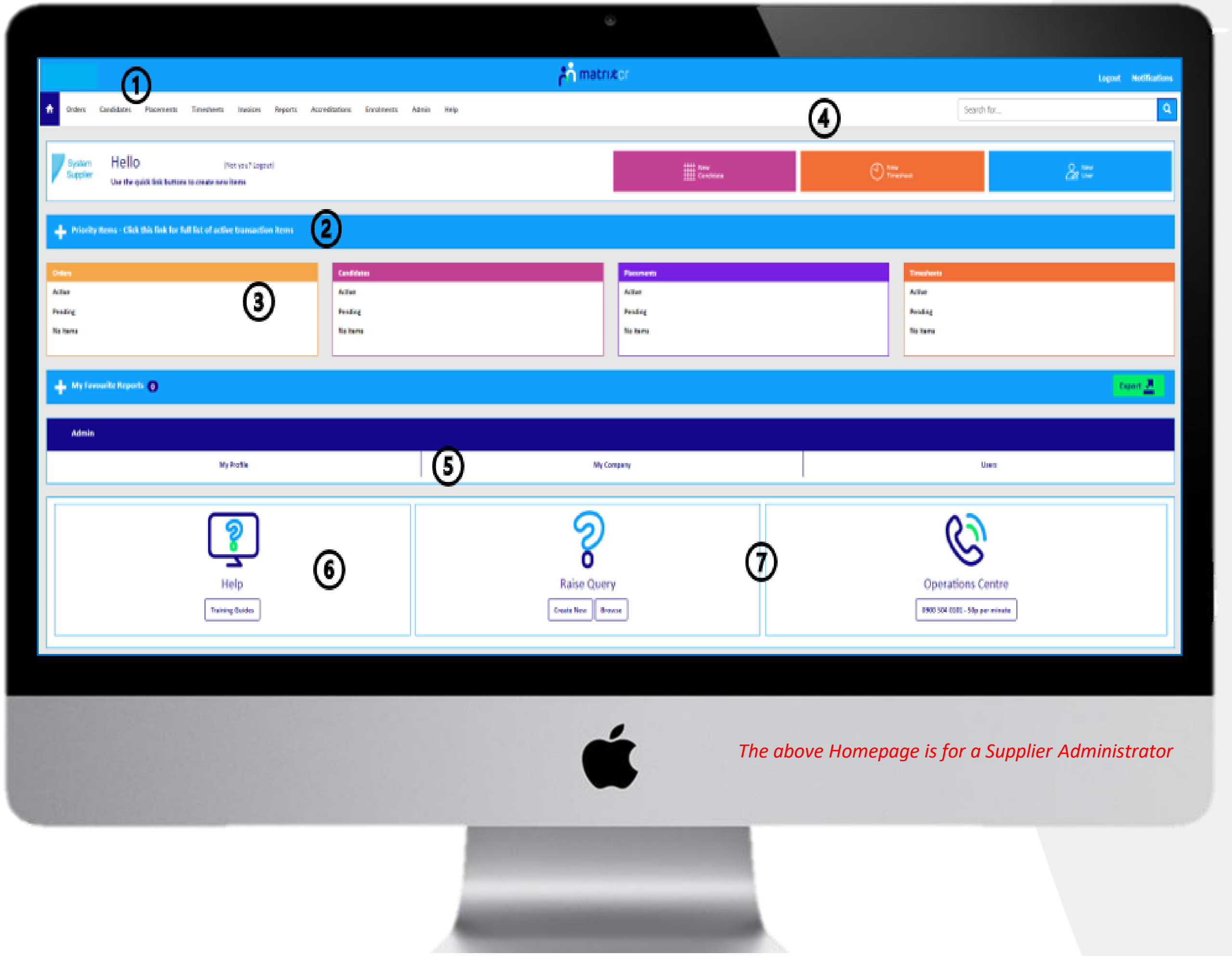
Visit www.Matrix-CR.net in your internet browser

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.



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

Home Screen



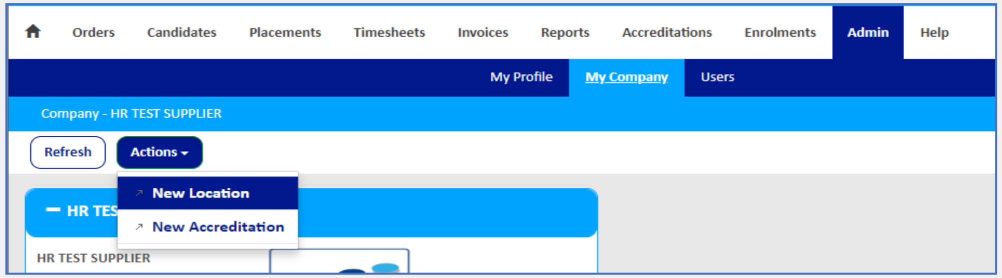
The above Homepage is for a Supplier Administrator

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

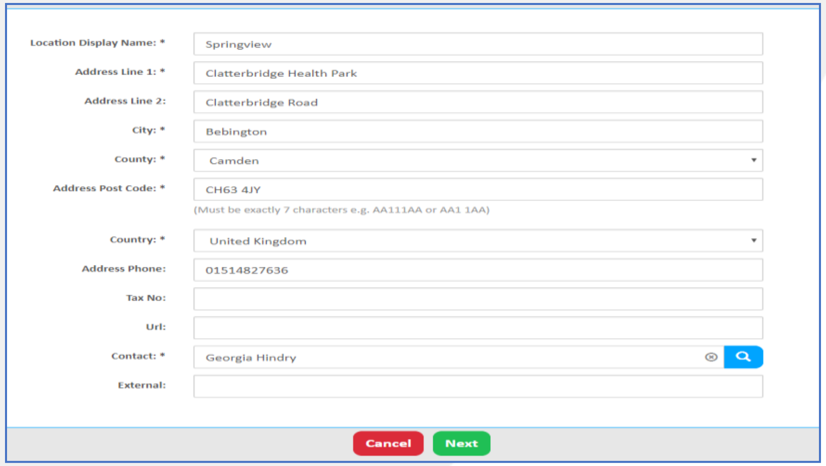
Adding Supplier Locations

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

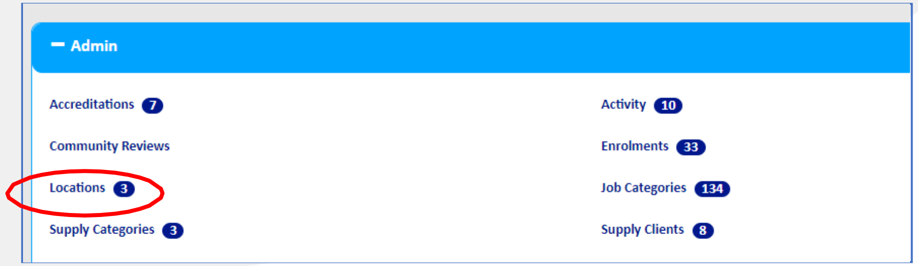
1. Navigate to **'My Company'** sub tab under the **'Admin'** navigational tab, or at the bottom of your Homepage in the Admin Sub Section.
2. Click **'Actions'**, **'New Location'**:



3. Complete the fields with the branch location details:



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



Accreditation

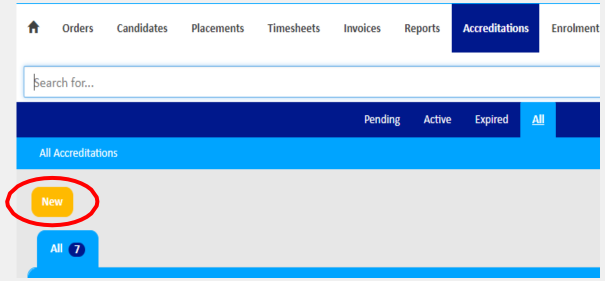
All Suppliers must complete an Accreditation to supply on Matrix-CR.net. Once approved, Suppliers will then be able to submit an Enrolment to supply to a Matrix Client.

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

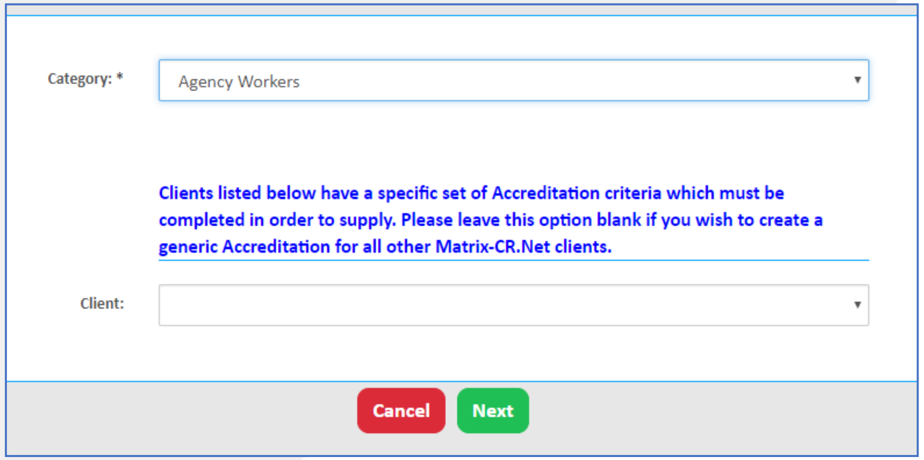
If you wish to supply to a Matrix SAAS Client, you must also complete a separate Accreditation for each Client.

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:



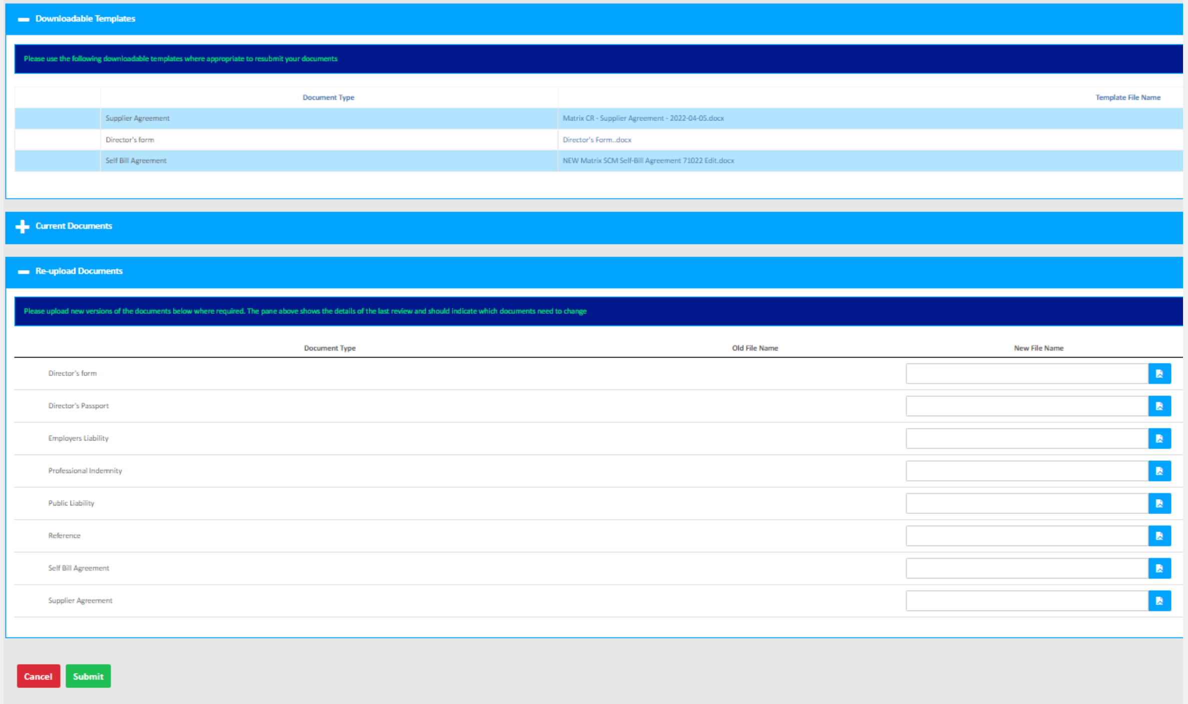
3. Choose which supply category and Client you wish to create an Accreditation for.



***Leave the Client field blank if you wish to Accredit 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*

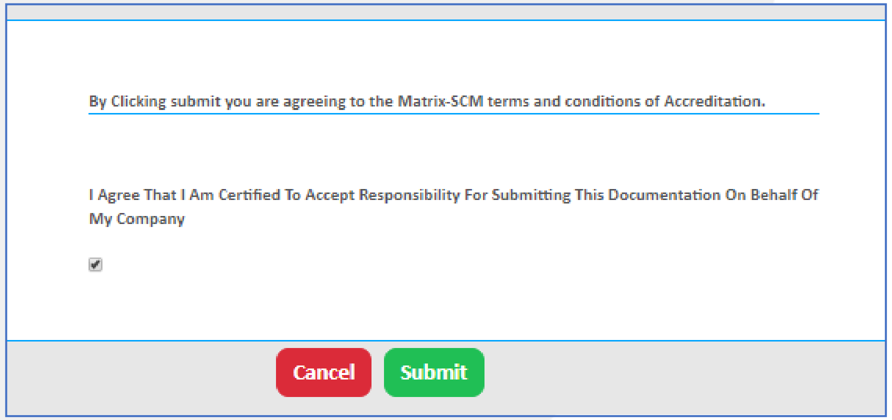
4. Click **'Next'** and answer all the listed questions

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



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

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

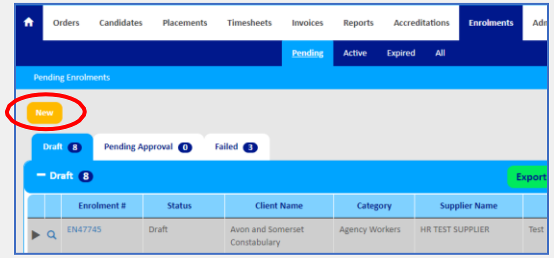


Enrolment

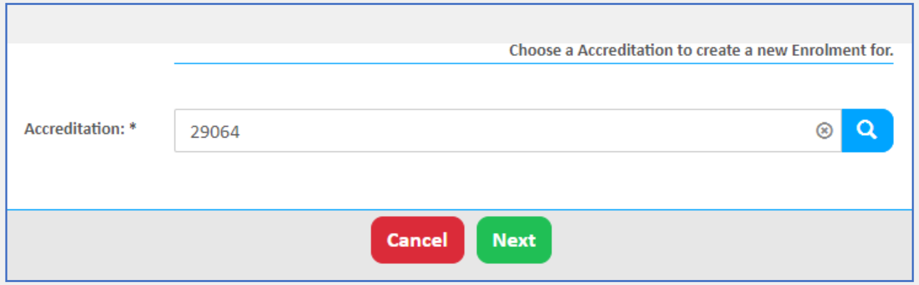
Suppliers must also complete an Enrolment to supply to a Matrix Client.

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.

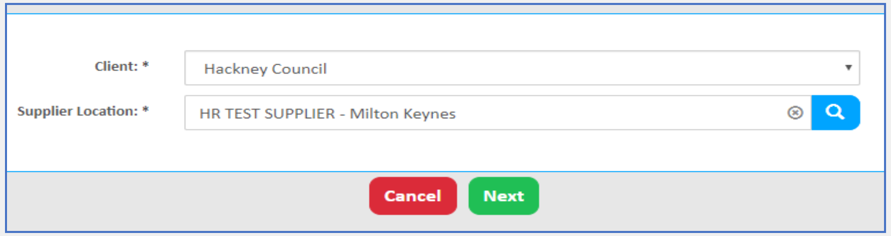
1. All Enrolments can be found under the Enrolments tab on the Navigation bar.
2. To start a new Enrolment, click on the **'New'** button:



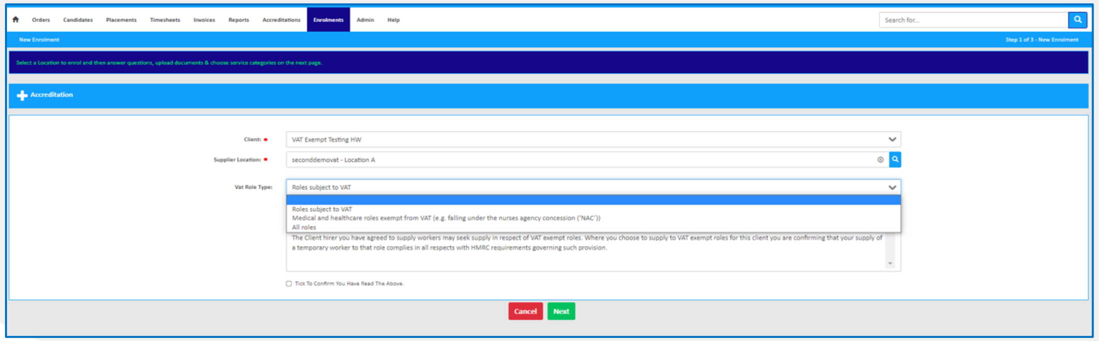
3. Use the icon to search for the Accreditation you wish to create a new Enrolment for, select the Accreditation via the icon:



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

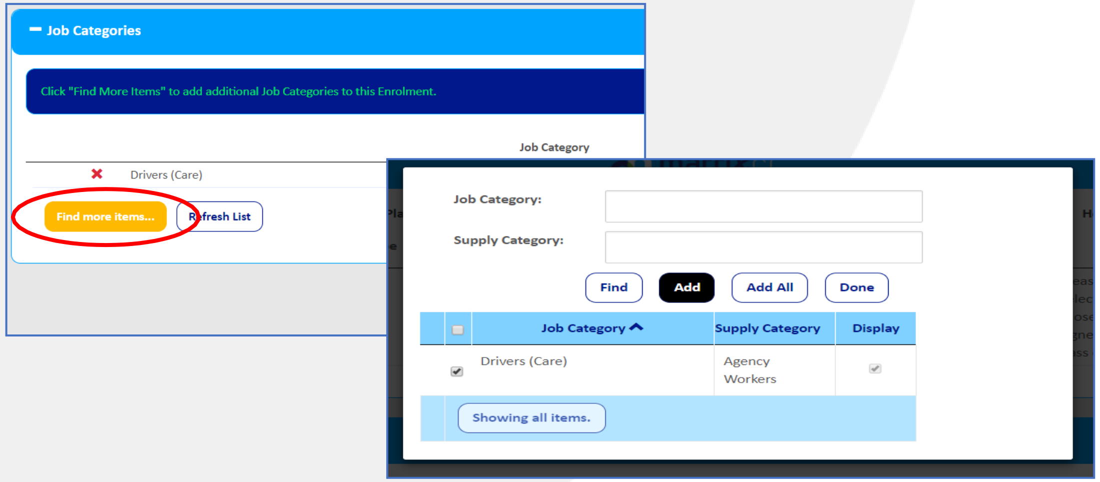


5. If you are enrolling to a client who have non-Vatable roles, the types of roles you will receive and can supply i.e., Vatable or VAT exempt, will be determined by your Companies VAT registration status. For example, a Non-VAT Registered supplier will only be able to supply VAT exempt roles. If your 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.



6. 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.

7. 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'**:



8. 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.

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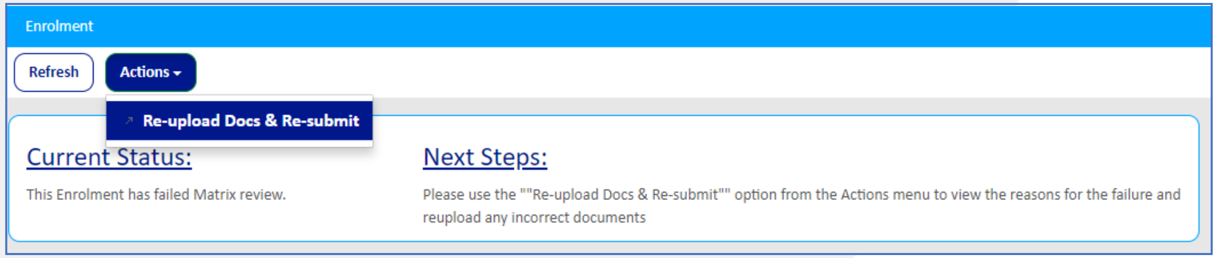
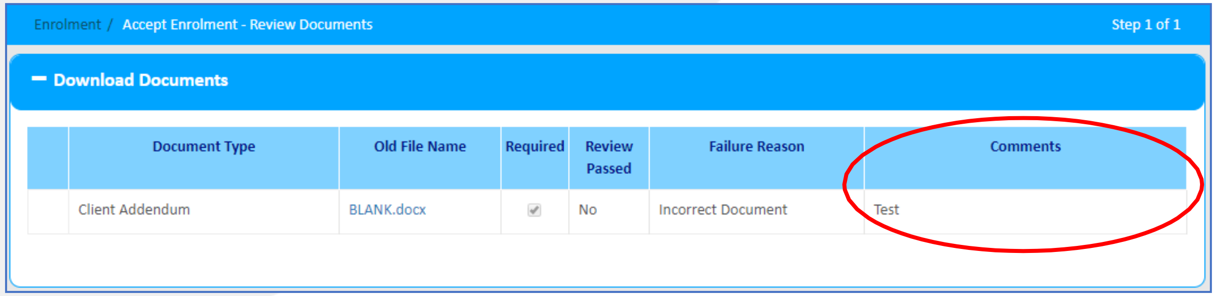
Resubmitting a Failed Review

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.

Contents

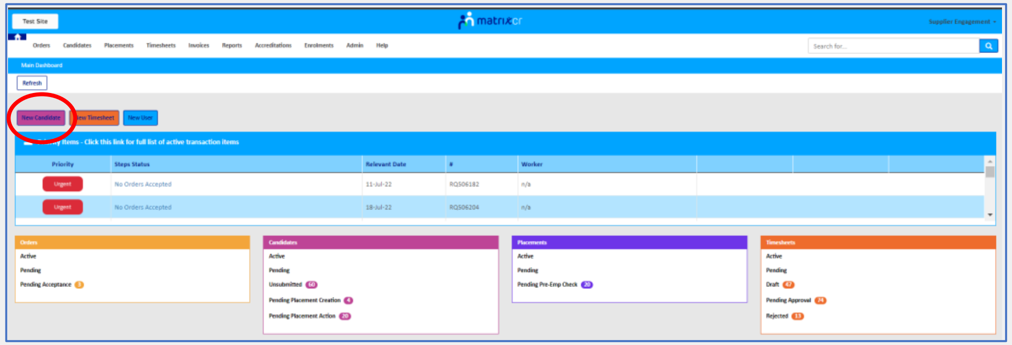
Order Review and Candidate Submission

Creating a Candidate User Profile

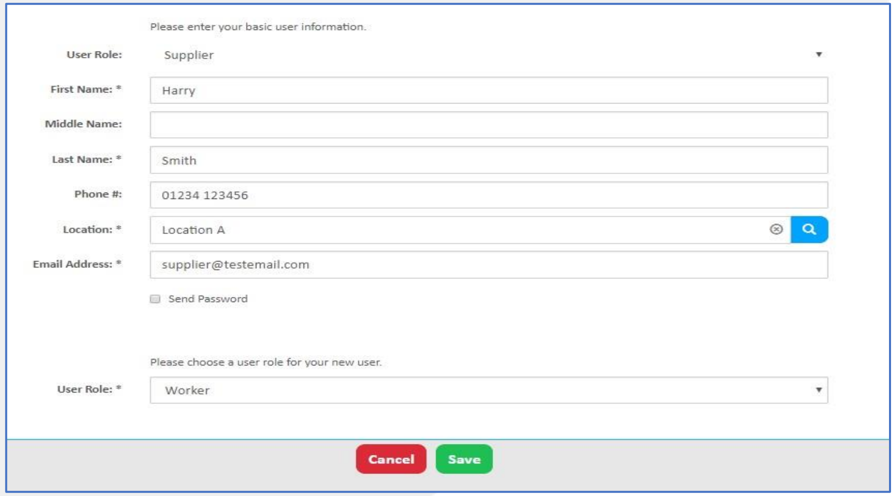
Each of your available Candidates must have a user profile within your Matrix-CR.Net system to be able to be submitted to an Order. The Candidate's profile only needs to be added once and will then be saved for future Candidate submissions.

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.

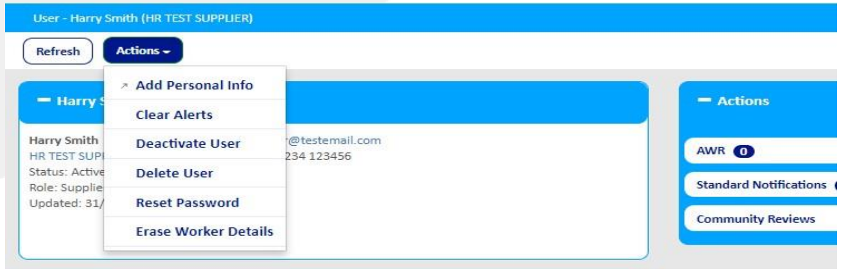
1. From the homepage, click on the **'New User'** button or navigate to the Users section under the **'Admin'** tab on the Navigation bar:



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

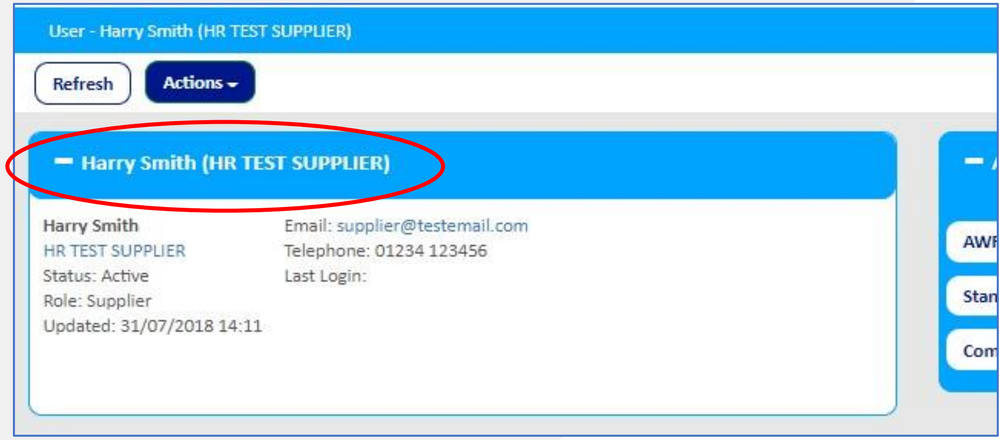


3. You can load and update your Candidate's personal details by going to **'Actions'**, **'Add Personal Info'** and completing the requested information. This information will be applied when submitting your Candidate to an order:



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 New. Fill in the relevant details and use to upload the relevant file:

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:



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

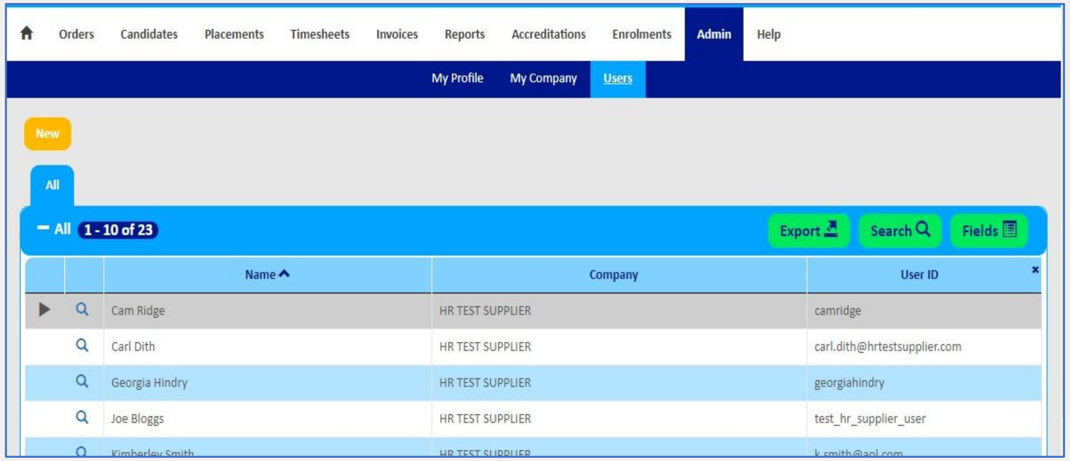
8. To reset a Candidate's password, choose the **'Reset Password'** option from the **'Actions'** button on the Candidate's User summary page

Removing a Candidate User Profile

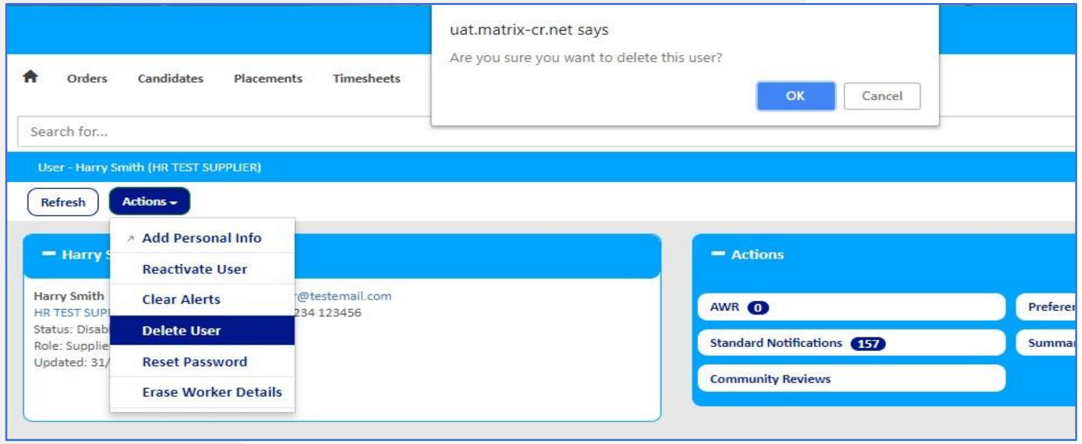
You can erase worker details, or deactivate or delete a Candidate's User profile at any time.

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



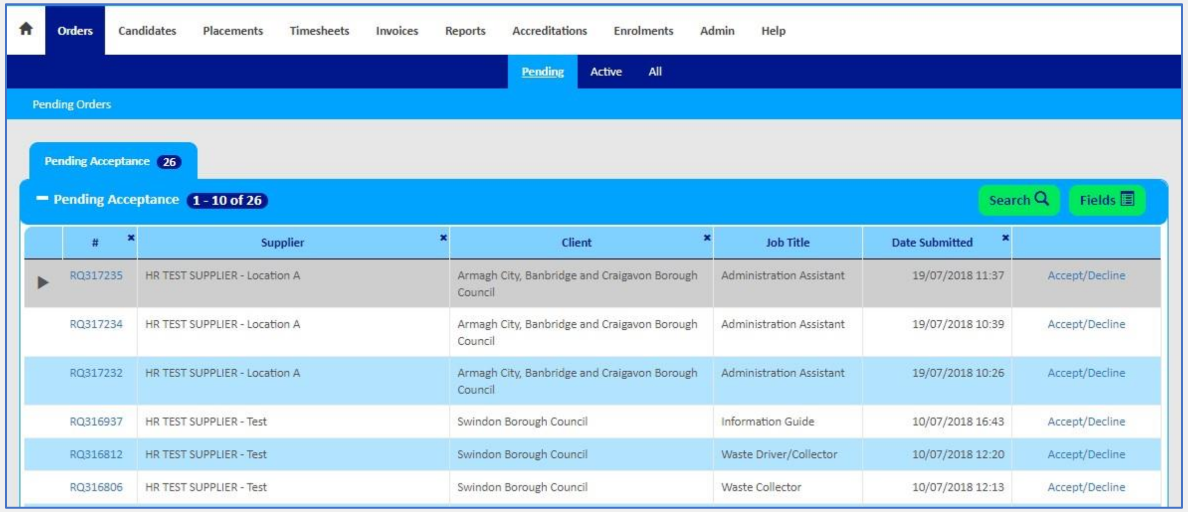
2. Choose the relevant option from the **'Actions'** button and follow the prompt at the top of the page:



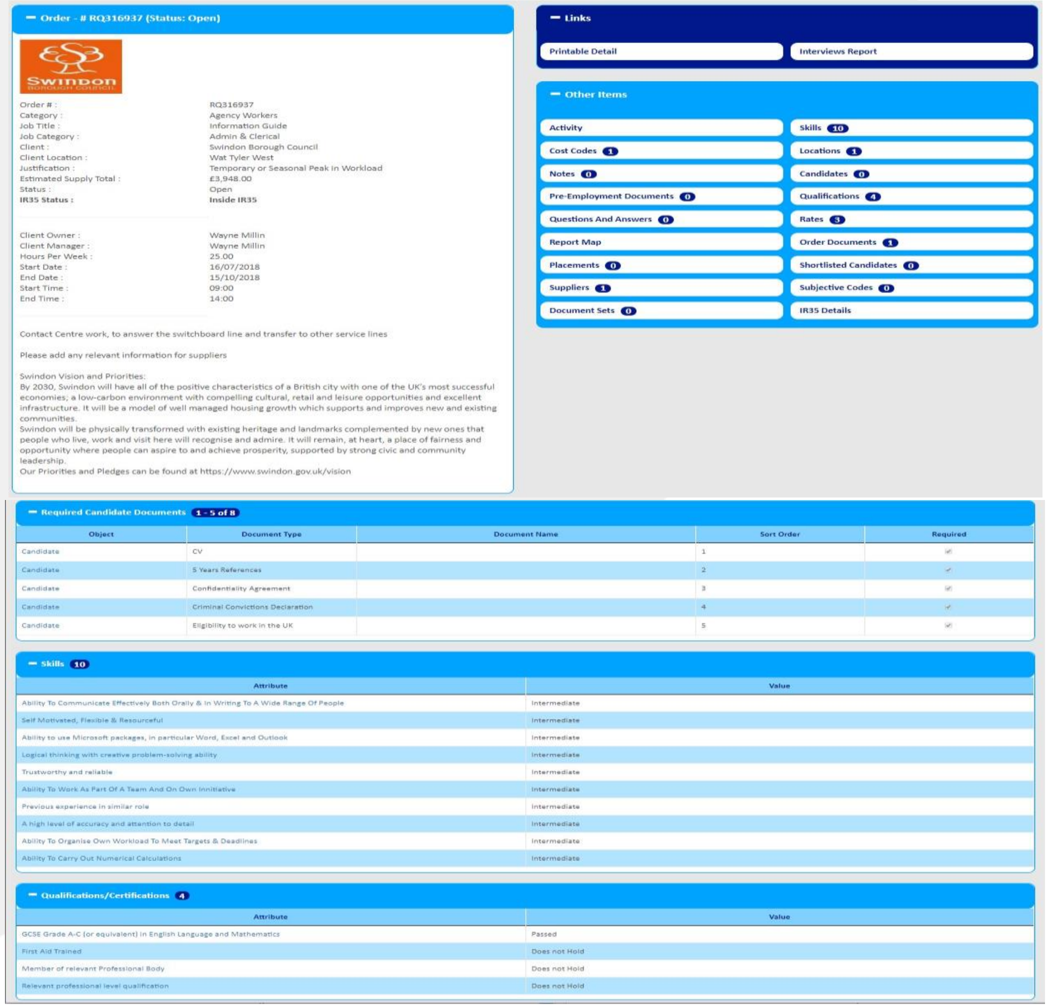
Order Review

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:



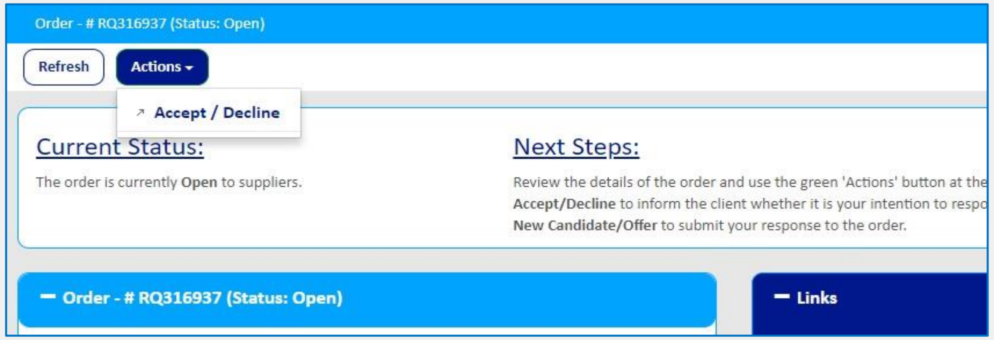
2. Use the icon to open the Order summary page, where you will be able to review the details of the role and any required candidate compliance and attributes:



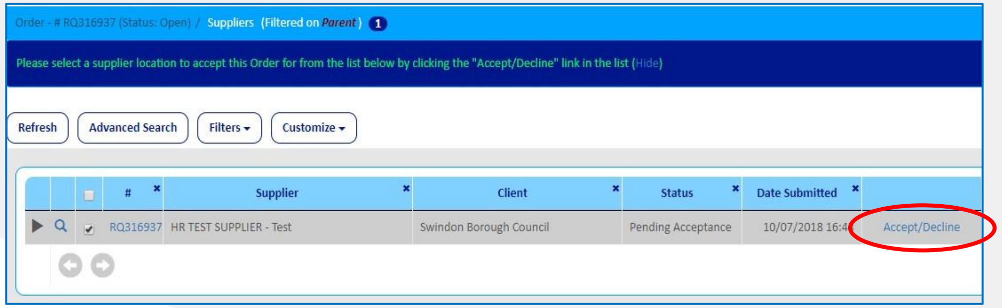
Accepting and Declining Orders

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

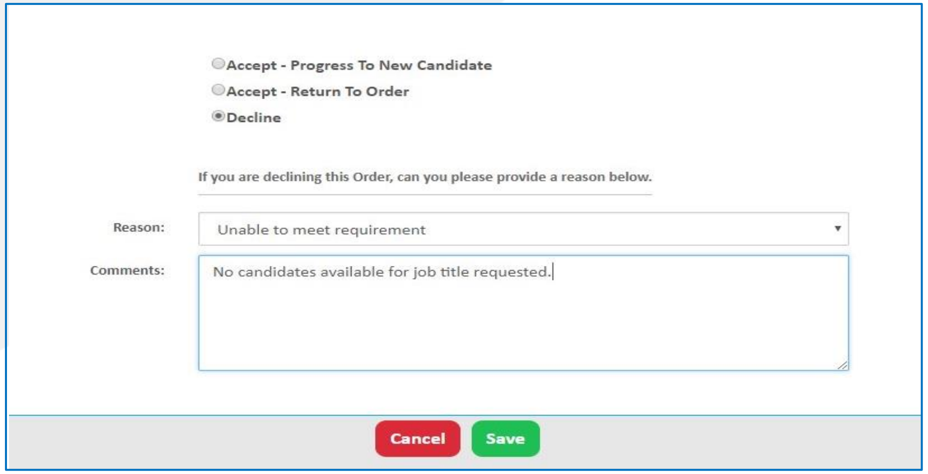
1. From the Order summary page, use **'Actions'** to choose whether to Accept or Decline the Order:



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



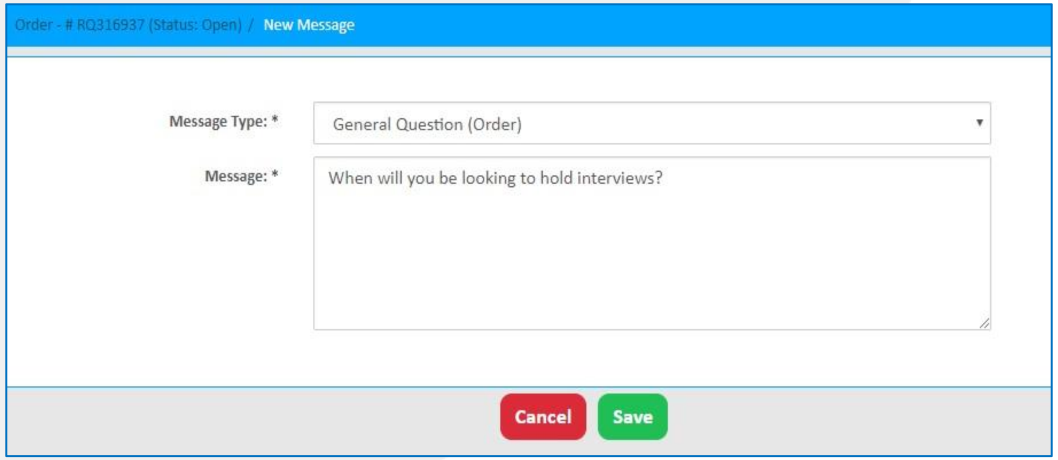
3. Select the Option you wish to proceed with and click **'Save'**:
   a. Accept the Order as one you will be able to fill, and proceed to submitting a candidate straight away
   b. Accept the Order but return to the Order page, and submit a Candidate at a later time
   c. Decline the Order to inform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



Order Messaging

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

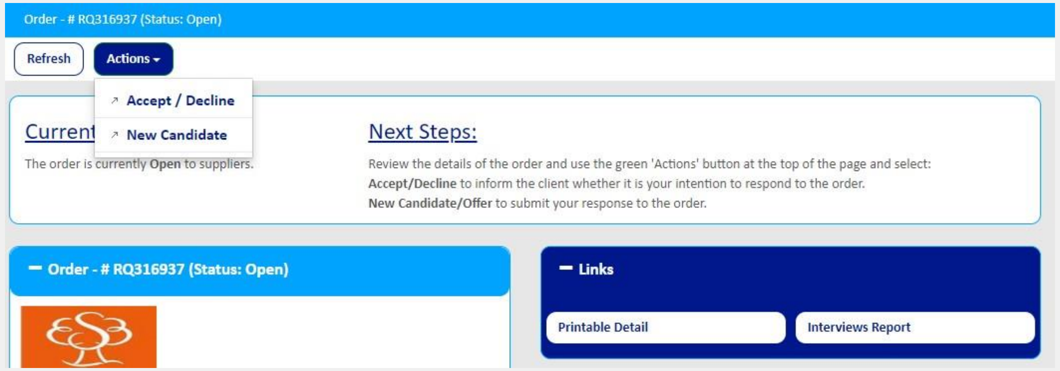
1. The Order messaging tool is at the bottom of the Order summary page. To send a new message, click on **'New'** and type your message in the free type box:



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.

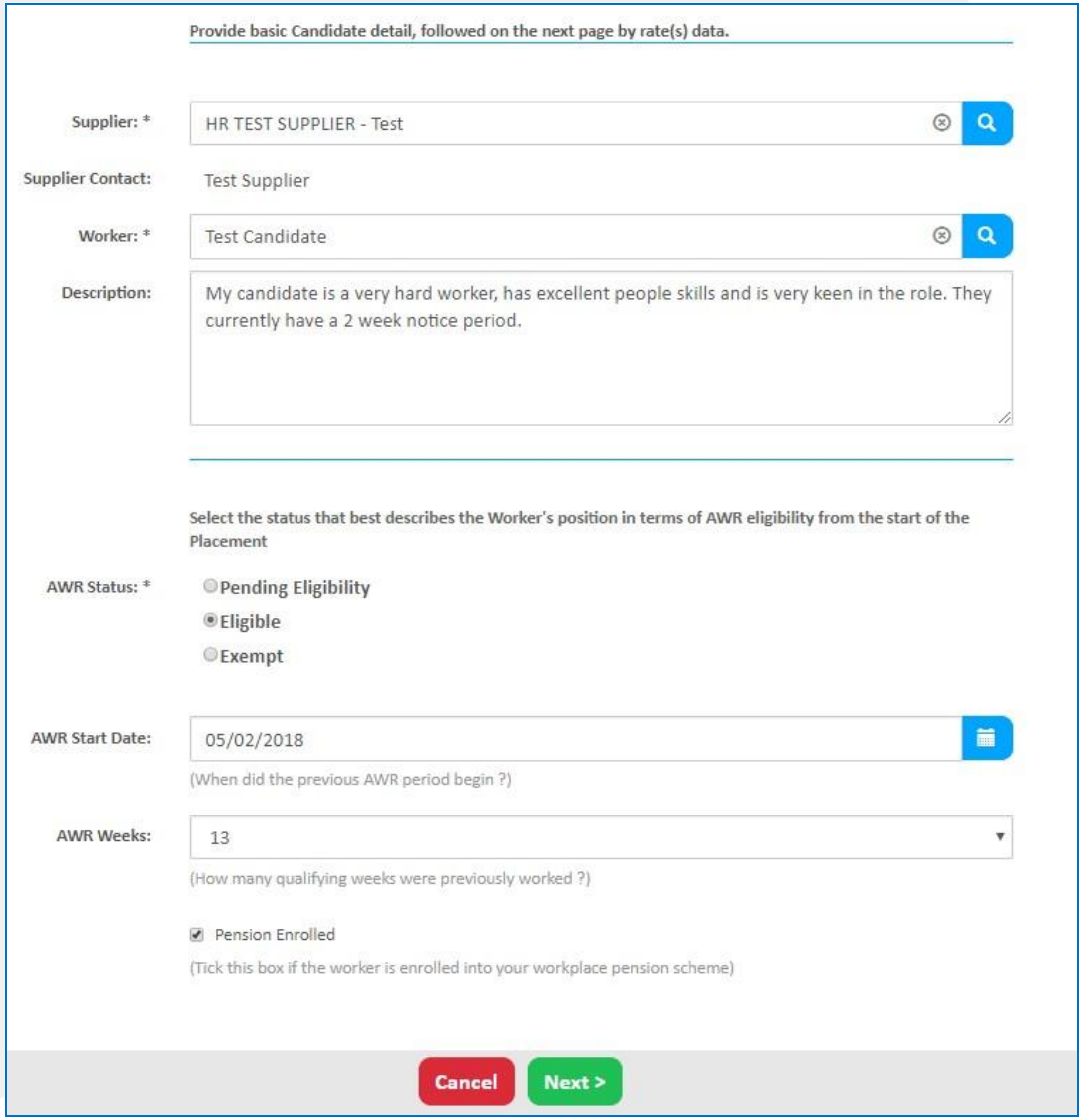
Submitting a Candidate

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:



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.



4. 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 Innitiative	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	

5. 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		True
National Insurance Number	Passport 1.jpg		True
Matrix Right to Work Form	Clearance 2.jpg		True
Eligibility to work in the UK	BLANK.docx		True
CV	Blank.docx	Agency CV	True
Criminal Convictions Declaration	Blank.docx		True
Confidentiality Agreement	Blank.docx		True
5 Years References	test.docx	References from Jan 2013 - July 2018	True

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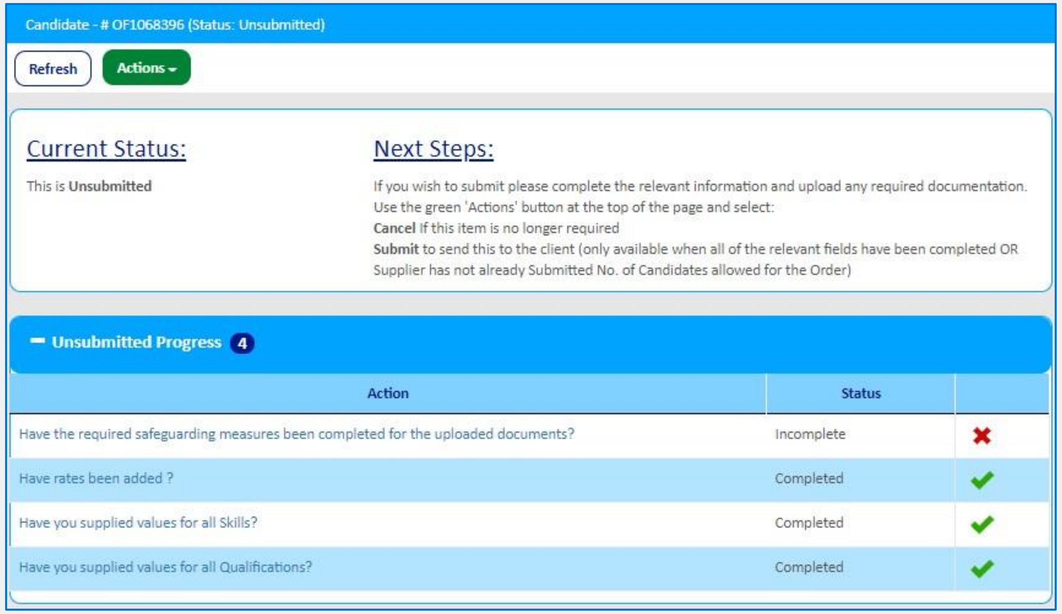
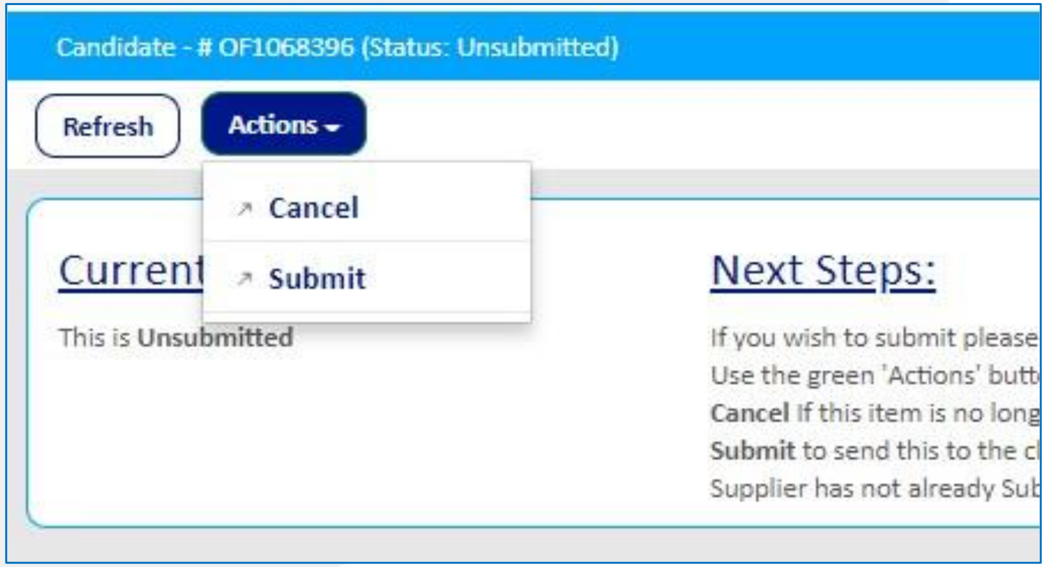
6. If any information is missing, Matrix-CR.net will flag this in the Progress section of the Candidate submission page. To update the missing information, click on the heading where a red cross is shown and complete the fields:



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

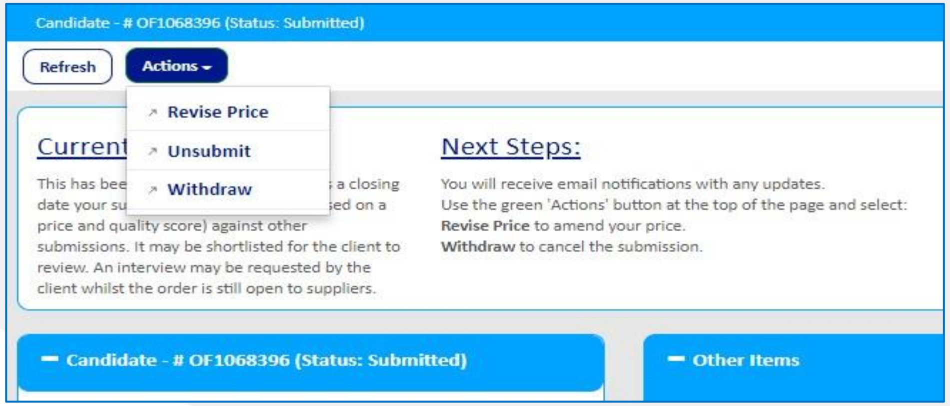


Withdraw or Cancel a Submitted Candidate

1. In **'Unsubmitted'** status, a Candidate submission can be cancelled at any time from the **'Actions'** button.

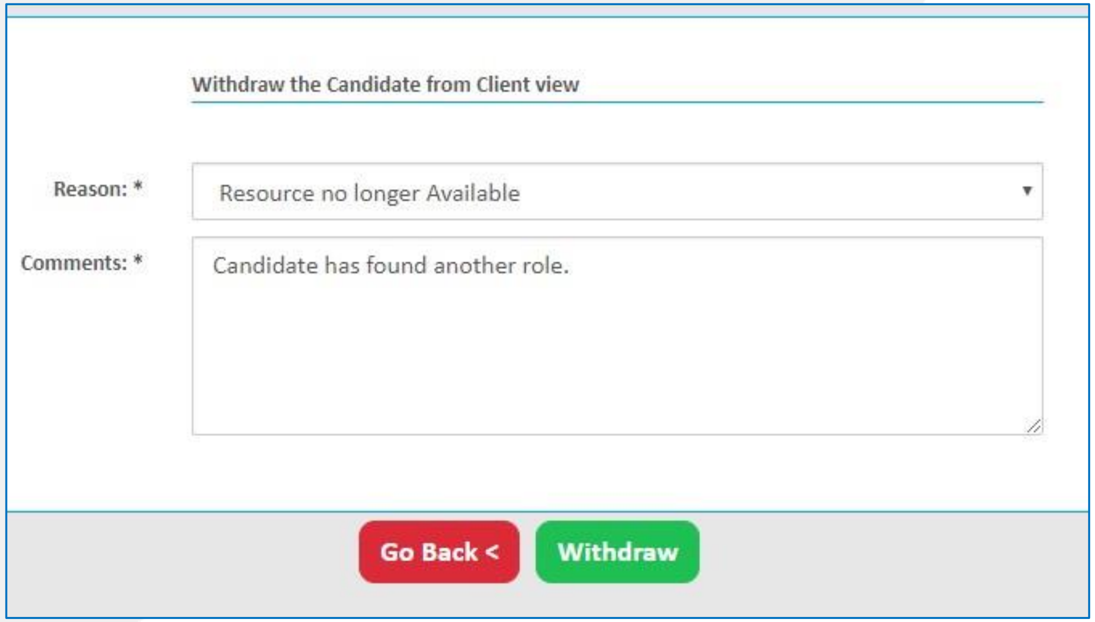
2. If you need to amend a Candidate submission, select the **'Unsubmit'** option to move the Candidate back into **'Unsubmitted'** status and allow you to amend the details. Whilst a Candidate is in **'Unsubmitted'** status, they cannot be reviewed for a role by the Client.

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.

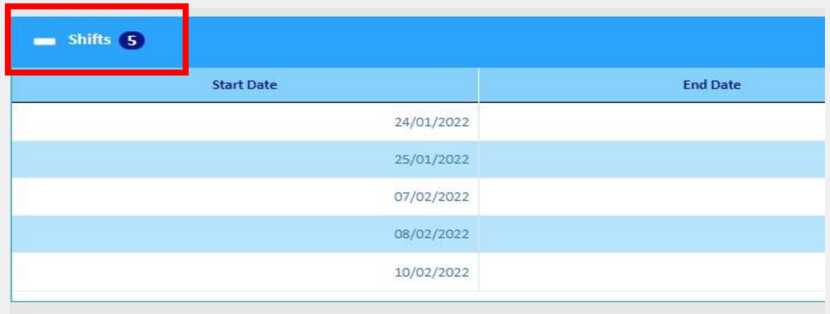


Adding or Removing Shifts on Candidate Submission

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

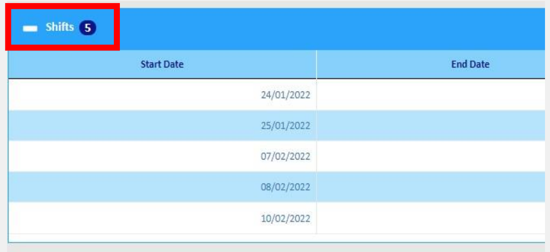
1. Once the candidate is in unsubmitted status, navigate to the **'Shifts'** section on their candidate profile:



2. 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.

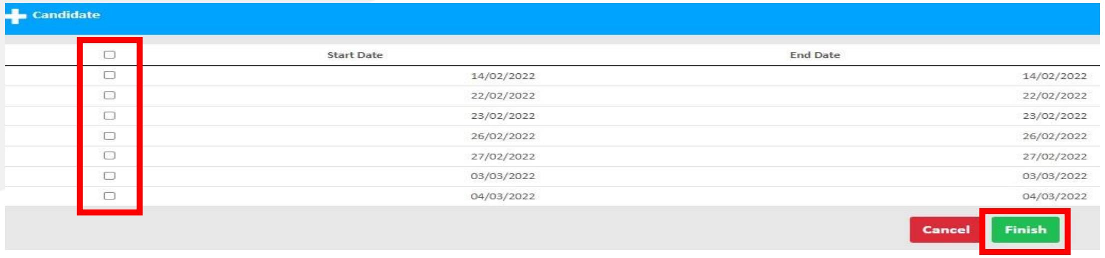
Adding Shifts from Candidate Submission

1. Once the candidate is in unsubmitted status, navigate to the **'Shifts'** section on their offer page:



2. To add shifts, click the **'New'** button:

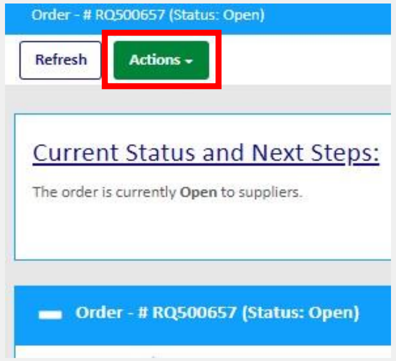
3. You will then need to select which shifts you want to add via the tick boxes and click **'Finish'.** Once finished amending shifts, submit your candidate for client review via the Actions button.

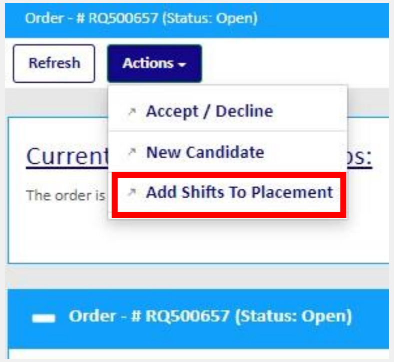


Requesting Shifts on Active Placements

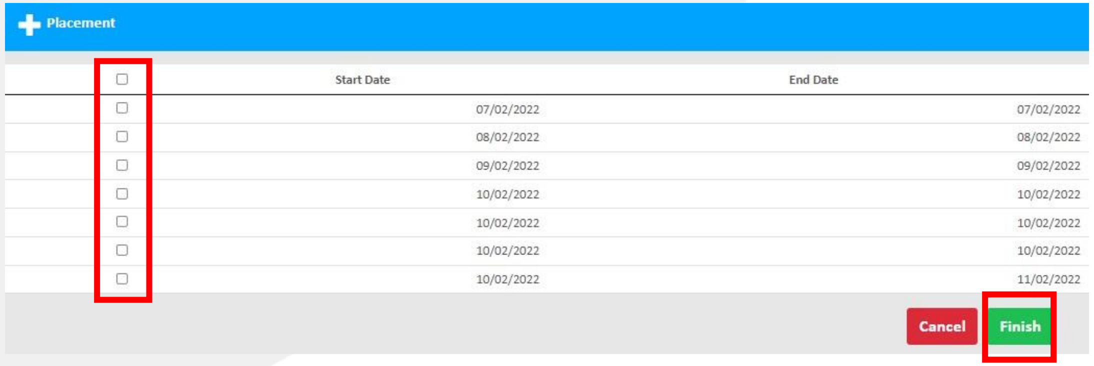
Suppliers have the ability to request shifts for their candidates in Active placement on the system from an open Order. Please be aware the Placement and Order must be linked (the Order the Placement was created through) and shift requests must be made via the Order.

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'**.





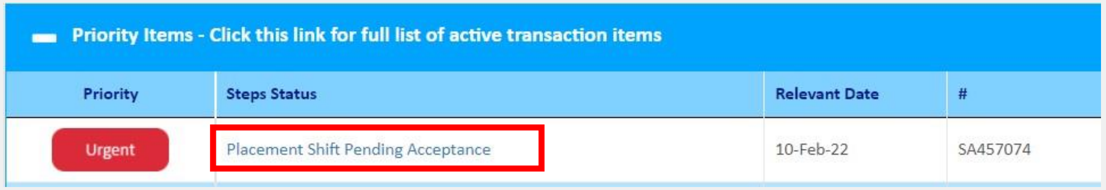
3. Navigate to the placement you are requesting the shifts for using the placement in question and click save.
4. Select the shifts you are requesting via the tick boxes on the left of the shift information and click **'Finish'**. The manager will need to approve the shift request before they appear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



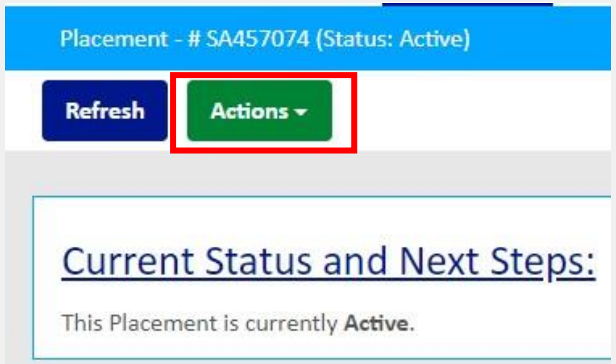
Approving Shift Requests from Managers

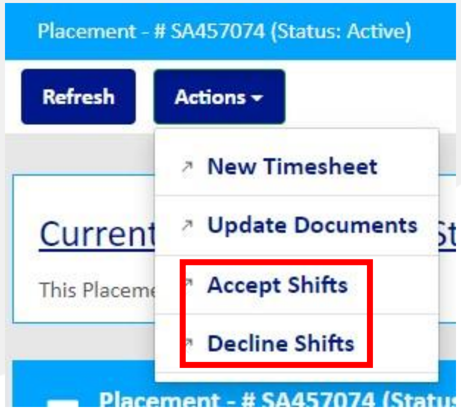
Managers can request shifts for their candidates in Active Placements on the system from an open Order. If a manager requests your candidate for a shift on an open order, you will need to approve this request.

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.



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

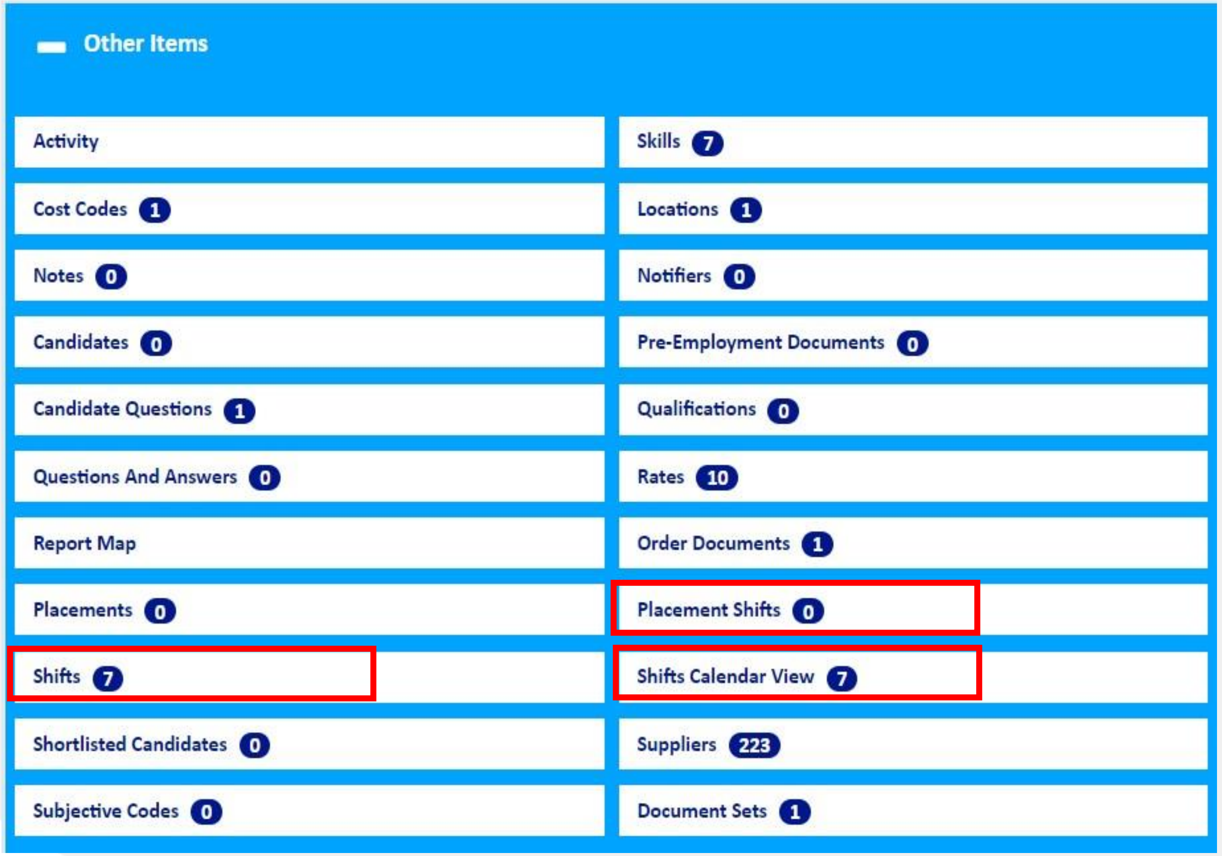




3. Use the tick boxes to select the relevant shifts and click **'Accept'** or **'Decline'** .

Relevant 'Other Items' on Shift Orders

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



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).

<u>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.</u>

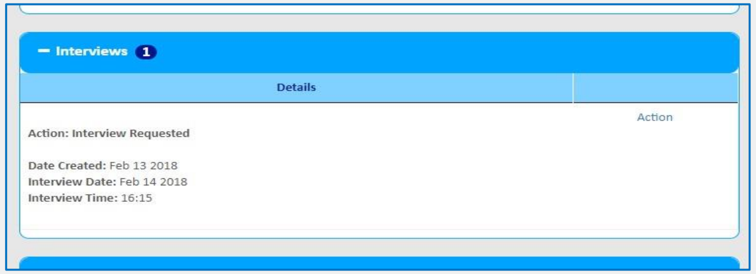
<u>If a manager contacts you directly regarding shift cancellations, please contact Matrix.</u>

matrix

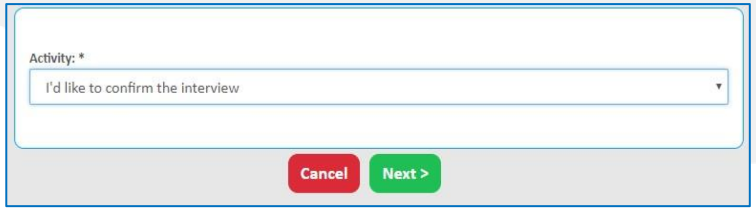
Managing Interview Requests

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.

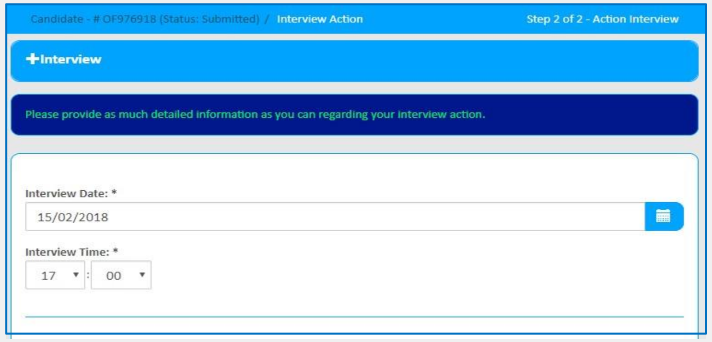
1. Use the email notification, or navigate to the **'Candidates'** tab on the Navigation bar to open the Candidate's submission page. Scroll to the bottom of the page to the Interviews section:



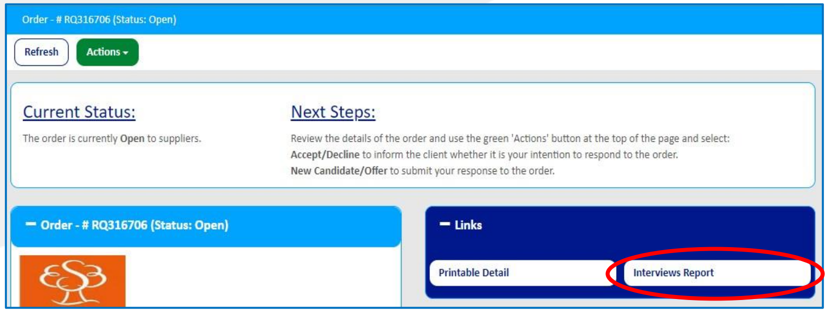
2. Click on **'Action'** and choose your response to the request
   a. The interview can be confirmed for the date and time requested by the Client. You will be required to submit a comment.
   b. You can request to rearrange the interview to a date and time that better suits your Candidate.
   c. The 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:

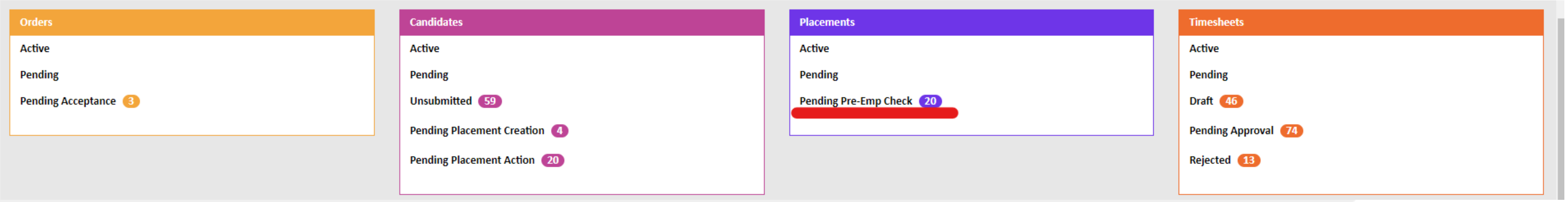


Contents

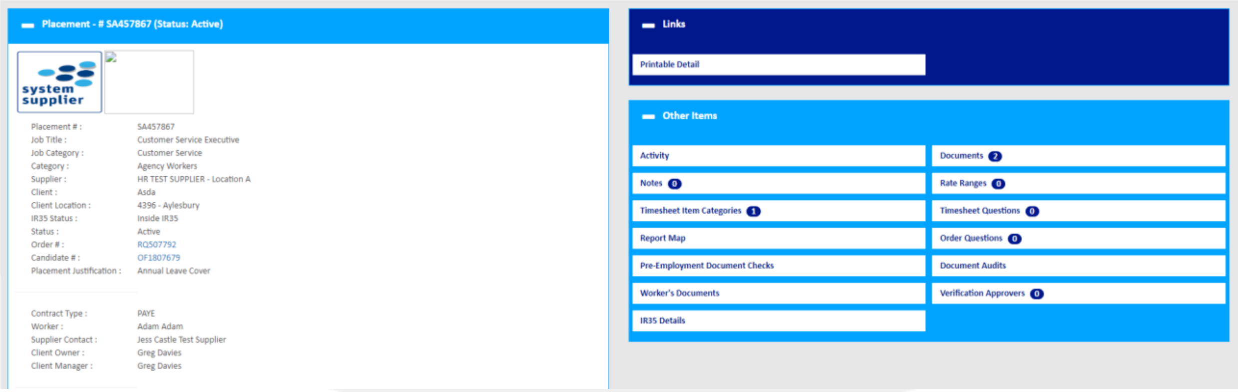
Placement and Timesheet

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:

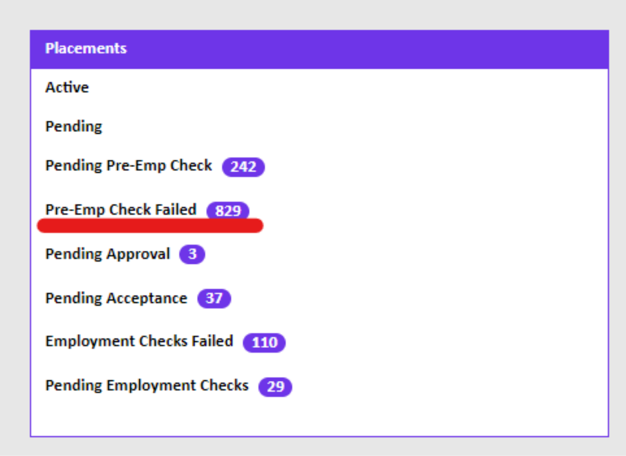


4. All Placement details can be viewed on the Placement summary page:

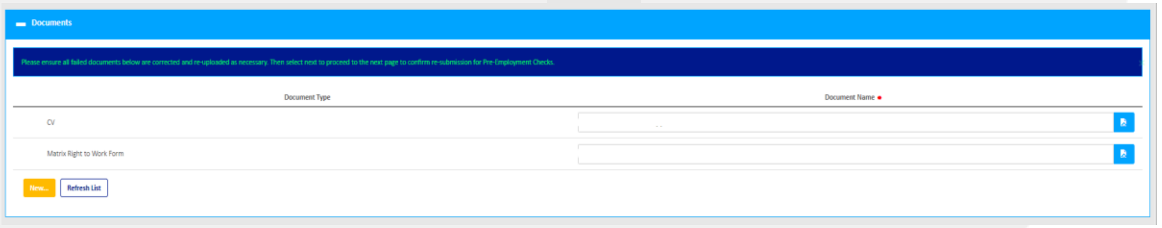


Failed and Passed Pre-Employment Checks

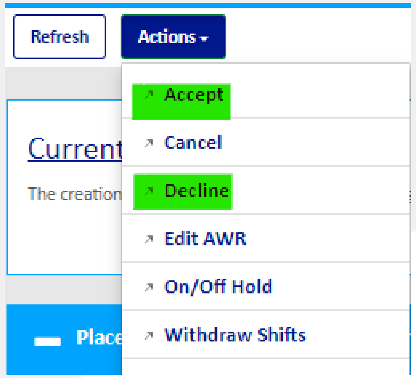
1. If your candidate's placement fails pre-employment checks, you will receive an email notification.
2. To view the placement and the reason for the failure, click on Pre-employment Check Failed section, this will take you to a list of all placements that have failed pre-employment checks.



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.

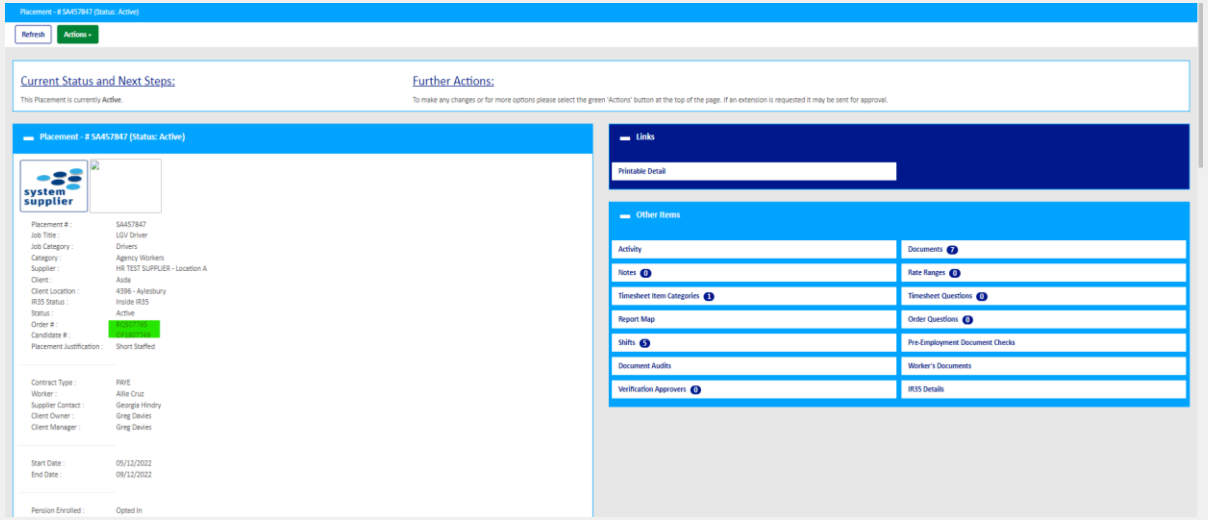


6. **To accept** – Means you are confirming to the Client that you are able to deliver the service as detailed within the Placement and agreeing to all previous terms and conditions stipulated:

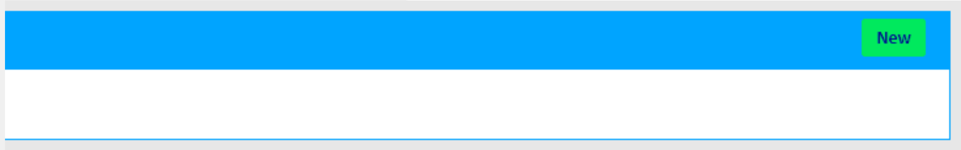
   To decline – Means you are informing the Client you are unable to provide the service as detailed within the Placement:

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'**.



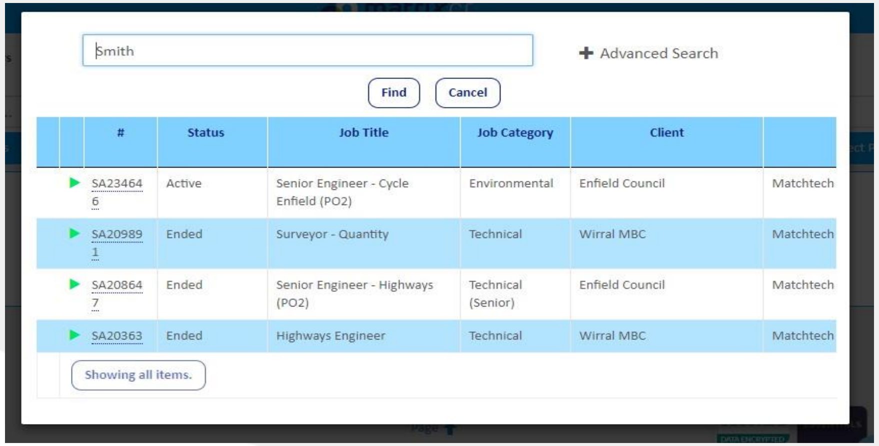
Creating a new Timesheet

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.



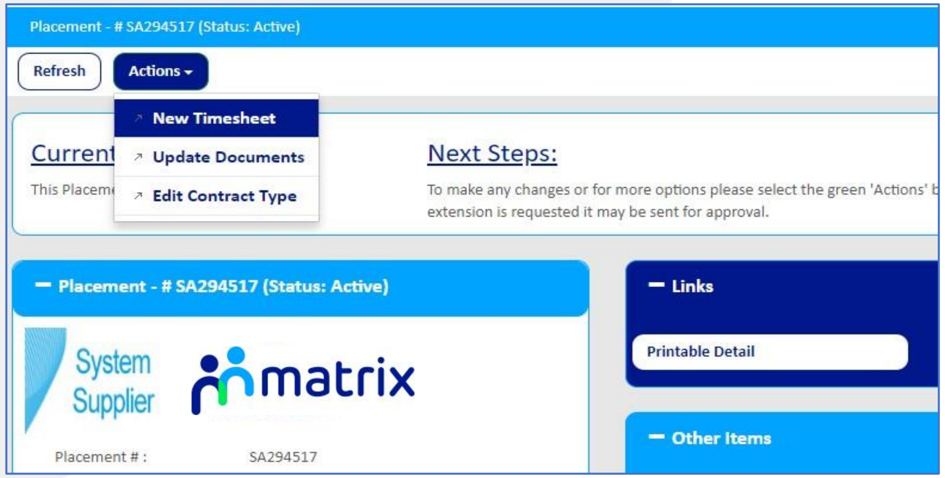
	#	Status	Job Title	Job Category	Client	
▶	SA234646	Active	Senior Engineer - Cycle Enfield (PO2)	Environmental	Enfield Council	Matchtech
▶	SA209891	Ended	Surveyor - Quantity	Technical	Wirral MBC	Matchtech
▶	SA208647	Ended	Senior Engineer - Highways (PO2)	Technical (Senior)	Enfield Council	Matchtech
▶	SA20363	Ended	Highways Engineer	Technical	Wirral MBC	Matchtech

Showing all items.

From the Placement

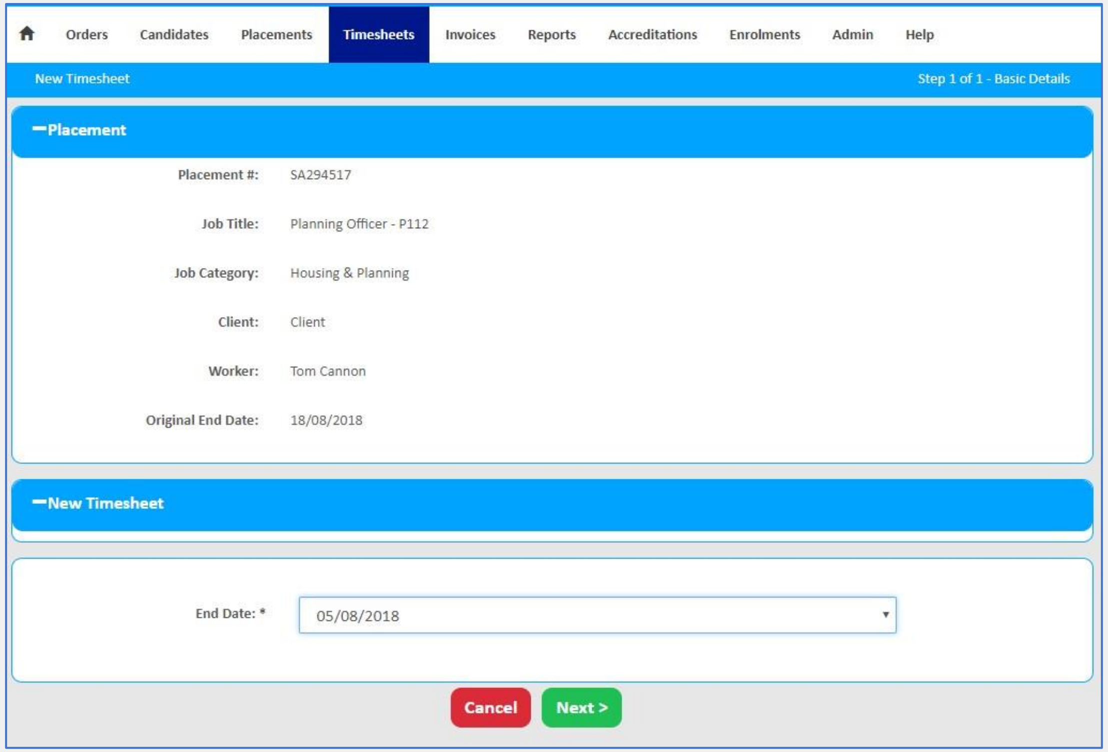
1. Navigate to the Placement summary page from the **'Placements'** tab on the Navigation bar

2. Use the **'Actions'** button and select **'New Timesheet'**:

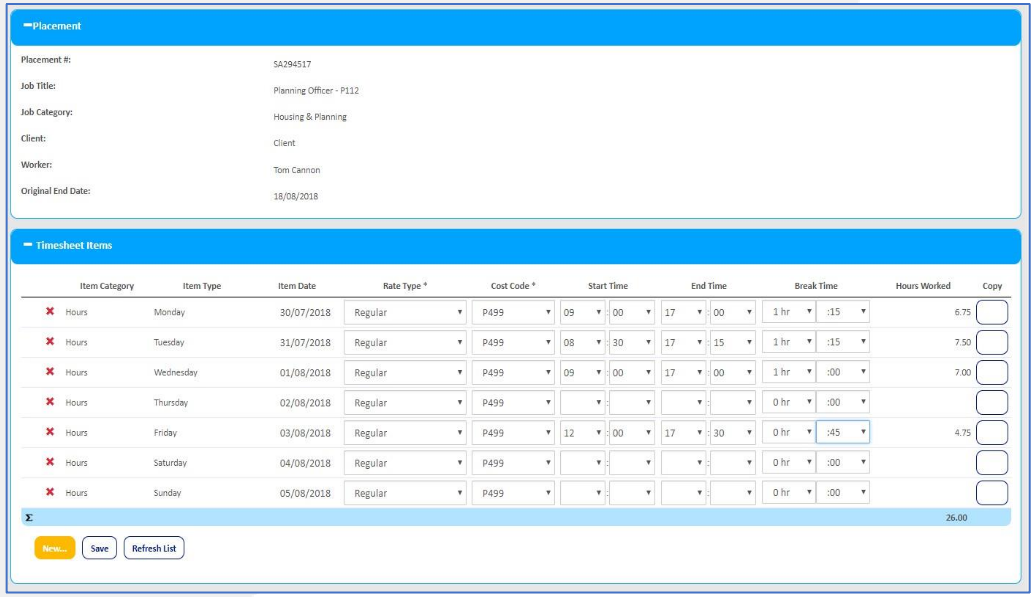


Submitting a new Timesheet

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.



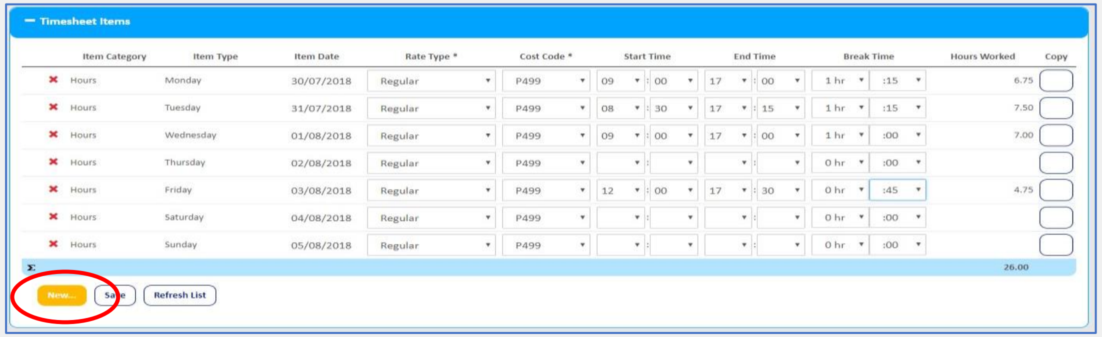
2. Use the drop-down lists to populate the start and end times of the days worked by the agency worker for that week. Remember to include any breaks taken:

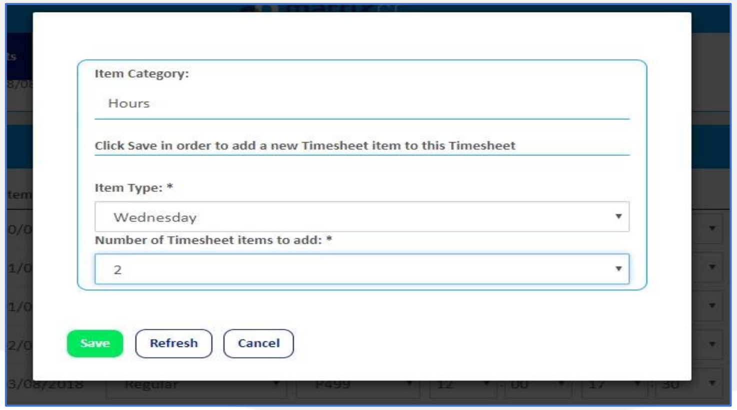


3. Use the icon to delete any rows that are not required.

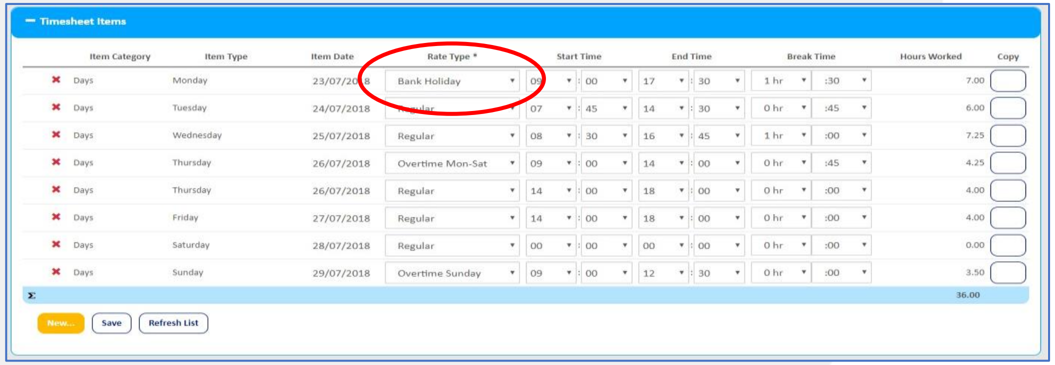
4. Use the copy function to copy the start, end and break times to all days listed. Click on the box under copy against the day that you would like to duplicate across all days to update the Timesheet Items:

5. 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:



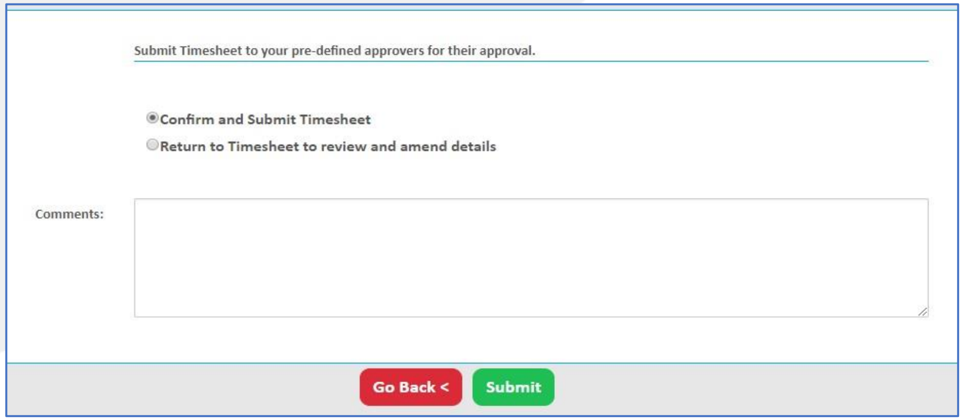


6. If enhanced rates are set up on a Placement (eg Overtime), choose the rate type from the drop down menu against the day worked:

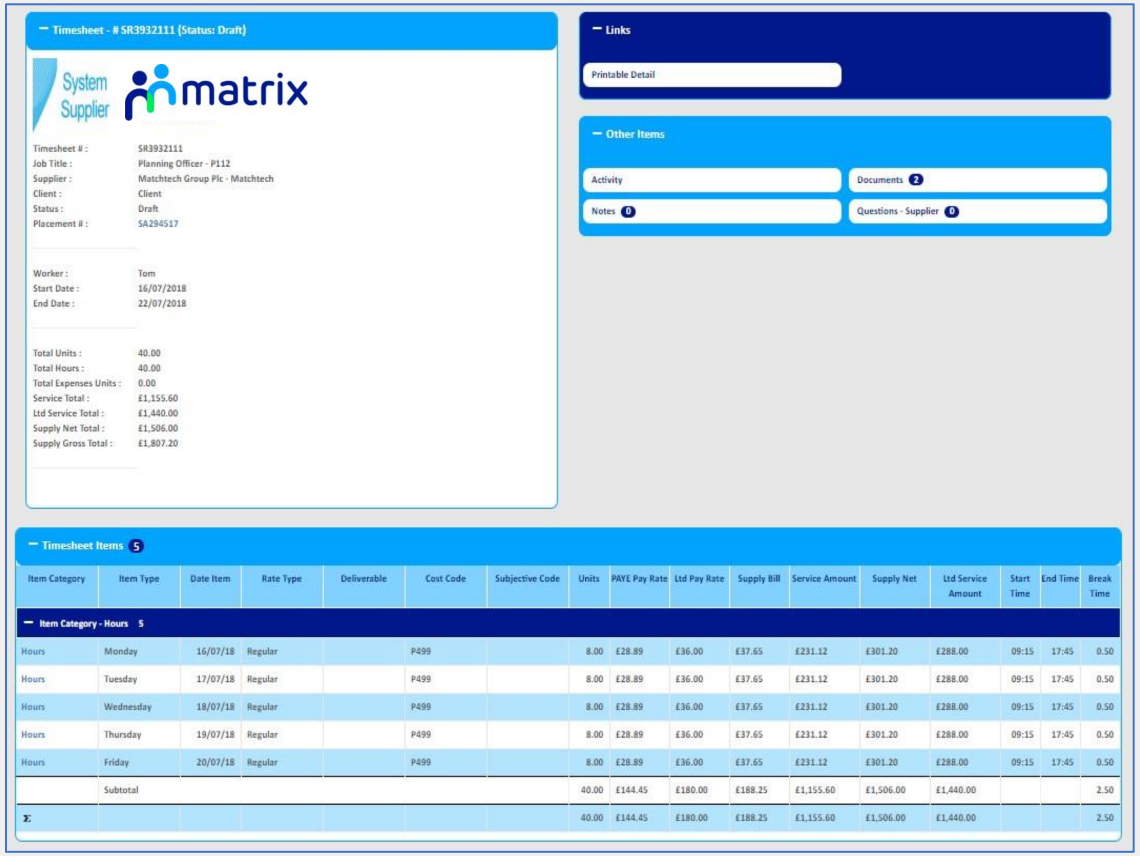


7. When all details have been completed, click **'Finish'**.

8. 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:

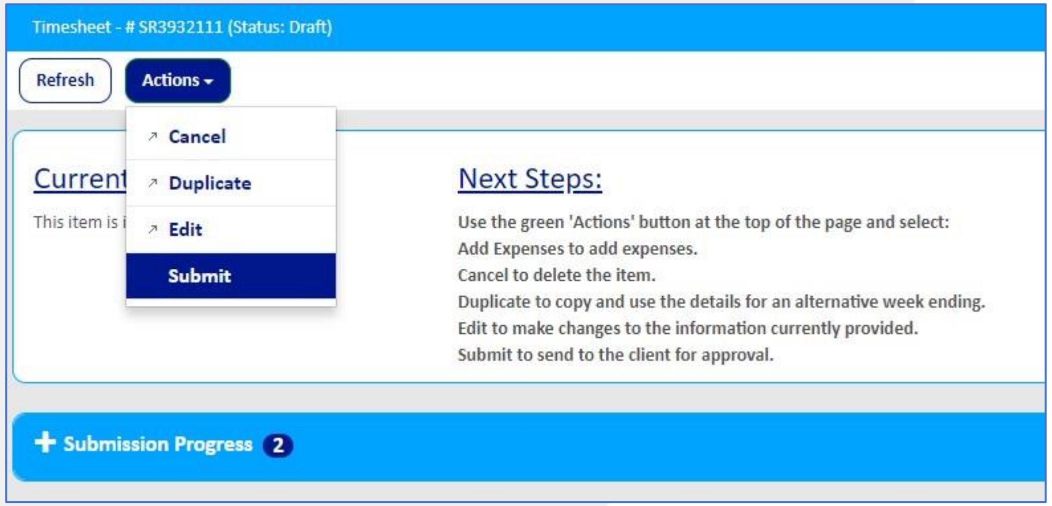


9. The summary page will detail the Timesheet items that you have submitted, along with an overview of the total hours, expenses and values to be submitted for that week:



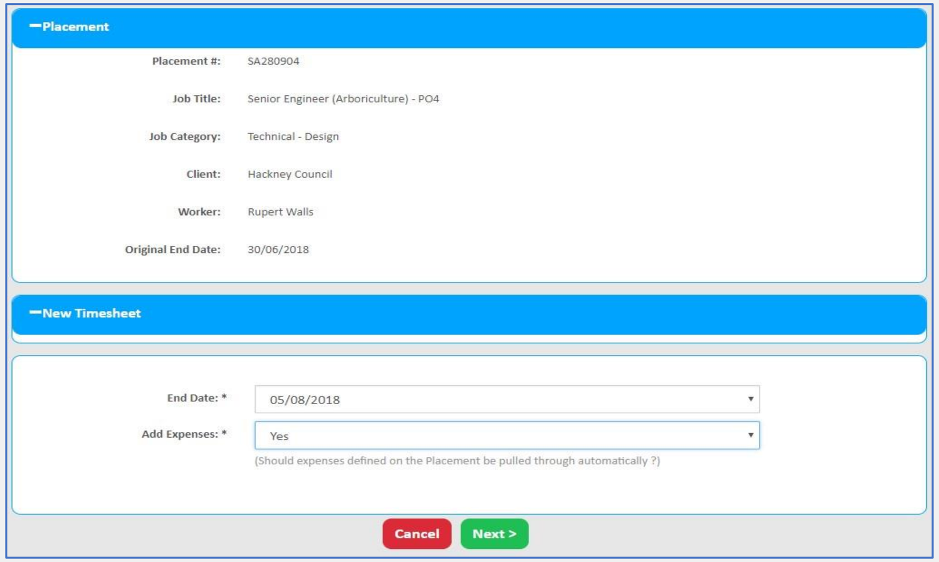
Item Category	Item Type	Date Item	Rate Type	Deliverable	Cost Code	Subjective Code	Units	PAYE Pay Rate	Ltd Pay Rate	Supply Bill	Service Amount	Supply Net	Ltd Service Amount	Start Time	End Time	Break Time
Hours	Monday	16/07/18	Regular		P499		8.00	£28.89	£36.00	£37.65	£231.12	£301.20	£288.00	09:15	17:45	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

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

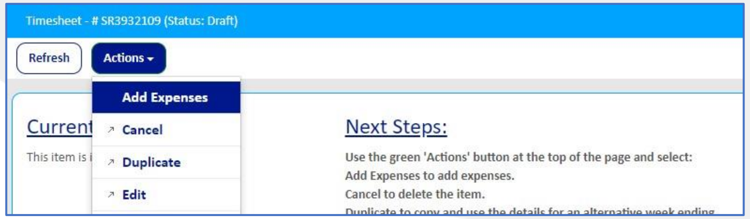


Adding Expenses

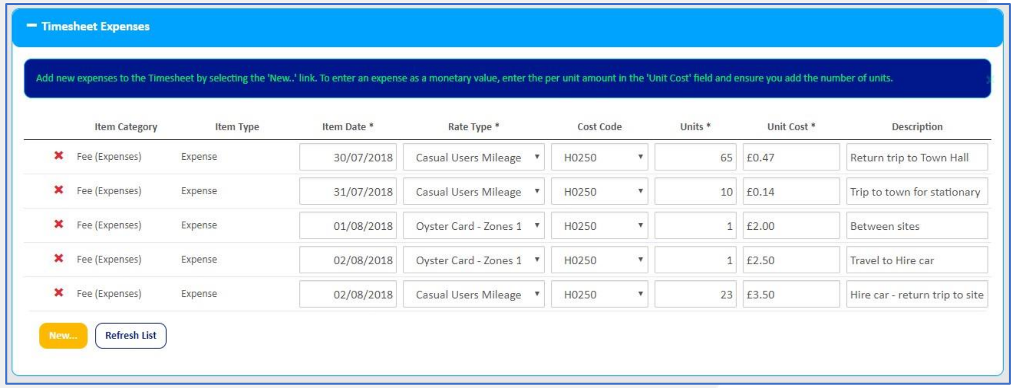
1. If the Placement has been set up to allow for expenses to be claimed, Matrix-CR.net will ask if you would like to add expenses when you start to create a new Timesheet:



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:



Timesheet Expenses

Add new expenses to the Timesheet by selecting the 'New..' link. To enter an expense as a monetary value, enter the per unit amount in the 'Unit Cost' field and ensure you add the number of units.

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

New... Refresh List

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'**.

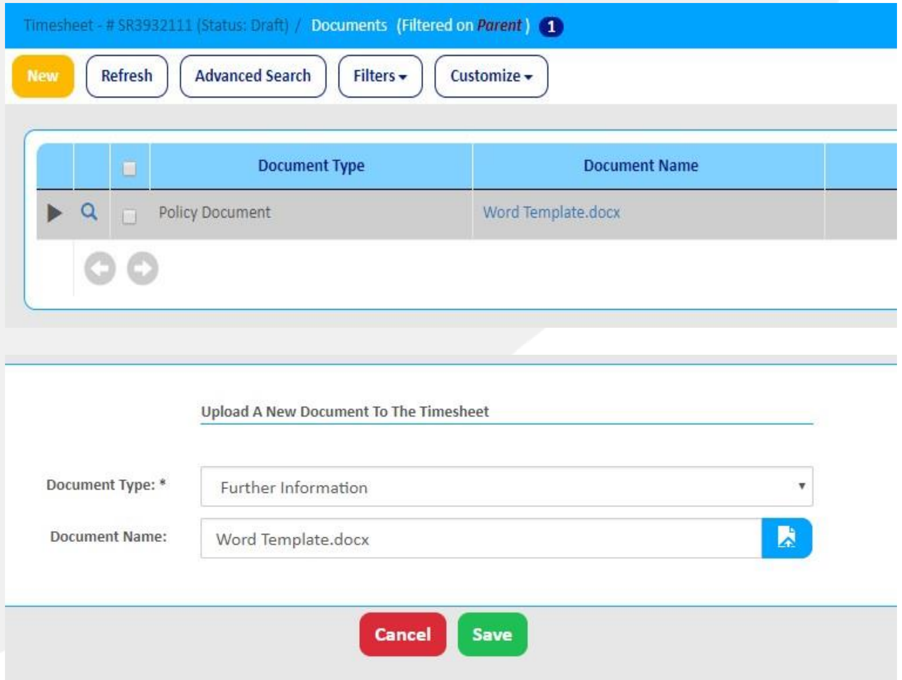
6. Choose the option 'Confirm and Submit Timesheet' to submit for approval, or choose to **'Return to Timesheet'** to review the Timesheet details before submitting.

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.

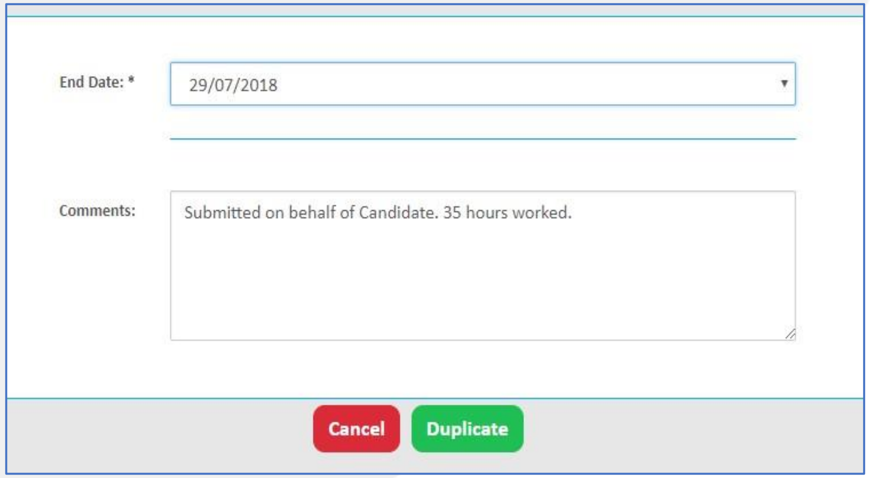
Duplicating a Timesheet

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:



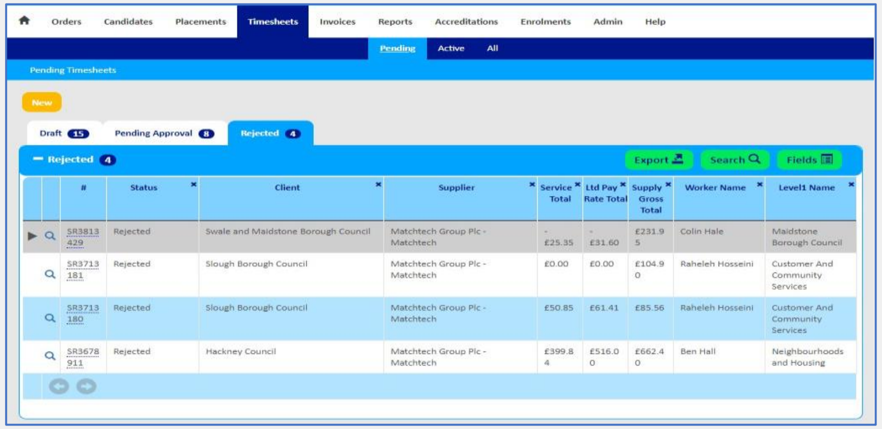
4. The Timesheet items will be pre-populated from the original timesheet. You will have the option to amend these details if needed

5. Once all the Timesheet items have been input, click **'Finish'** and then **'Submit'** to submit the timesheet for approval.

Rejected Timesheets

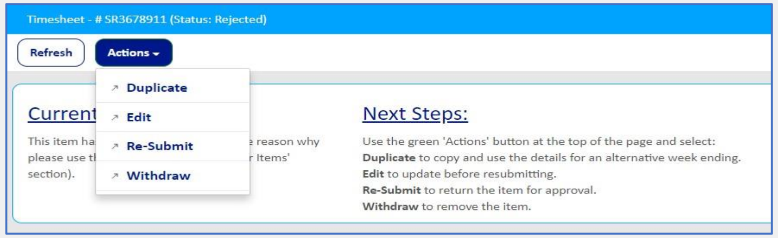
Submitted Timesheets will go to the listed client approver to action. The Timesheet will either be approved or rejected, depending on the details that have been submitted. You will receive an email notification once a Timesheet has been actioned.

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



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

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



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