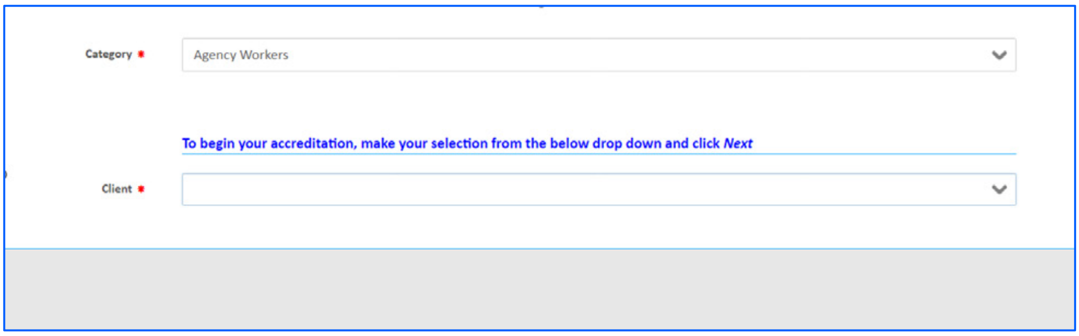
Supplier Accreditation & Enrolment Guide – Cr.Net

This guide is for suppliers starting out on Matrix CR.Net platform and provides guidance on how to complete your accreditation & client enrolments.

Accreditation:

Setting Up The Accreditation:

The accreditation approves you generally onto the Matrix platform. To begin this process go to Accreditations and select "new". You will then be asked to select the category and client you wish to accredit for. Please note that for each category/client combination you can only create one accreditation. Should you need to edit or continue an accreditation these can be found and actioned through your accreditations tab:



For the category you can select from "Agency Worker" or "Permanent"

For the client you will be able to submit an accreditation for the SAAS clients or for the majority of our client base please select "Accredit to all other clients".

From this screen you will then be asked to complete a series of yes or no questions.

Once these are completed you will be required to upload a series of documents:

Director's Form:

For this form we require you to complete your company details including the following:

- Company Number
- Company Incorporation Date
- Director's Name
- Director's DOB
- Director's Appointment Date
- Director's Signature (This form cannot be type signed, must be either hand-signed or an electronic signature)
- Signature Date and incorporation date

This form must be signed by a director as listed on companies house, please also ensure that the signature and appointment dates match the data as provided on your companies house record.

If Companies House shows any outstanding actions e.g. confirmation statement or accounts we may reach out to you for further information as your application may not be able to be approved until these are completed.

Director's Passport:

If your company was incorporated under one year ago, you will be required to upload a copy of the director's passport. For the passport please make note of the following requirements:

- Must be the passport of the director as listed on the director's form
- If the passport is not a UK passport, we may require additional documents such as the Right To Work and Share Code

Insurance:

We will require evidence of your current insurances. Each client has their own insurance requirements and we will check you meet these requirements against the documents you provide on the accreditation. To meet the accreditation requirements please ensure you upload documents which:

- Confirm your Employer's Liability, Public Liability and Professional Indemnity cover
- Confirm that you are the insured party
- Confirms the period of cover (start and expiry date)
- Confirms the limits of indemnity
- Confirms that these limits are on a "per claim" or "per occurrence" basis

This information can usually be found on your insurance schedule. Please note that as these covers expiry annually, once your documents reach their expiry date you will need to upload new documents which confirms the above.

Reference:

If your company was incorporated under one year ago you will be required to provide a reference from a client for whom you have supplied temporary staff. For this reference we require the following:

- The reference must confirm that you have supplied staff
- This reference must be on the referee's letterhead or their company email
- Referee/Signee Details must be clear and include their position within the company
- Referee Company Details must be visible on the document e.g. address or within the header/footer

Self-Bill Agreement:

This form confirms your agreement to work using our self-billing system. For this form we will need you to complete the following:

- Effective Date at the top of the agreement
- Company Details within the parties section

- VAT Status/VAT Number
- Bank Details for Payment
- Factoring Details (where used)
- Partnership Package Level (if opting to sign up for an upgraded membership)
- Supplier Finance Contact
- Director's Signature, signee details and signature date – please note that this form must be signed by a director as listed on companies house and cannot be type signed.

Please ensure all details are up to date as per your current companies house records when submitting this form.

This form will expire on an annual basis and will need to be re-completed and re-submitted on the anniversary of the signature date.

Supplier Agreement:

This form is your overarching agreement with Matrix. In order to approve this document please ensure the following details are completed:

- Effective Date
- Company Details (Please check these match the most recent details as per companies house)
- Signature (Cannot be type signed, must be either hand-signed or an electronic signature)
- Signee Details and Signature Date

Please note that this form will expire after three years and will need to be re-completed and re-submitted at this time.

Enrolment

Once your accreditation has been approved you can then begin to create and submit enrolments for specific clients.

To submit a new enrolment please follow these steps:

- Go to the enrolments tab on your top menu
- Click on the orange "New Button" to begin a new enrolment
- Select your accreditation from the drop down menu – this will determine the category of roles (Agency or Permanent) and clients you can see, we will also use the information provided on the accreditation to assess your enrolment request.
- Select your branch location from the drop down menu

Please note that the branch location will determine which users have access to the roles. If you have multiple branches please ensure you are selecting the correct branch.

If multiple branches need to access roles for a particular client, then you will either need to submit enrolments for each branch or add the enrolled branch location to the relevant user profiles.

- Go to the client list and select the client you wish to enrol for – please note that for each client you will need to complete a separate enrolment.
- You can then download the addendum for completion, this will contain the terms of supply for this client including margins, insurance requirements etc.
- In order to ensure we can process your enrolment please ensure the following details are completed:
    - Effective Date
    - Company Details – for the registered address, please ensure this matches the address listed on companies house.
    - Where highlighted company name added in header – for addendums where this is needed the header will read "Insert Company Name" and be editable
    - Signature and signee details
- Please note that as per the accreditation documents these addendums cannot be type signed.
- Once you have read and signed the terms, upload the completed addendum where prompted
- You will then need to add job categories to determine the roles that you receive:
    - To add these click on the orange "Find More Items" which will bring up the list of available categories
    - Tick the ones you wish to enrol for and click "Add" then click "Done" to add these to your enrolment
- Once you have completed/uploaded the enrolment and have selected your job categories you can then submit the enrolment for review by our team.

Approval to client supply chains will depend on your VAT status, insurance levels and the full completion of these forms.

To check the insurance requirements for the client, please refer to the addendum where these are listed in section 8. If your insurance levels (as provided on your accreditation) are below these requirements you will need to increase your cover and update the accreditation to proceed.

FAQ

When will my accreditation/enrolment be reviewed?

A member of the team will review your application usually within three working days.

Why has my accreditation review failed/How do I re-submit?

If your accreditation has failed review you should receive an email outlining the reasons for failure. These can also be checked by going to the Accreditations tab, selecting the Accreditation › Actions › Re-upload docs & re-submit. Here you will be taken back to the accreditation screen where you can see your current documents and any failure reasons. You can then make any changes/upload the additional/updated documentation and re-submit for review.

I am unsure why my accreditation has failed

If you are unsure what requires correction please use this guide to cross-reference the document requirements. If still unsure or if additional information has requested please contact supplier.engagement@teammatrix.com for assistance.

How do I add more job categories to an existing enrolment?

Unfortunately further categories cannot be added to an existing enrolment. If you wish to supply into more categories or across multiple branch locations new enrolments will need to be created.

How can I see what I'm enrolled to?

To check your enrolments go to Admin > My Company > Job Categories, this will show you the categories you are enrolled to, location enrolled & your current tiering.