

Supplier Guide - Prism

This guide is for our Matrix Prism system and can be used alongside the training videos to support you as you navigate the platform.

Training Videos:

Accepting a job offer – <https://share.synthesia.io/c96Ofaf4-781a-4872-9d76-e163e9f25de0>

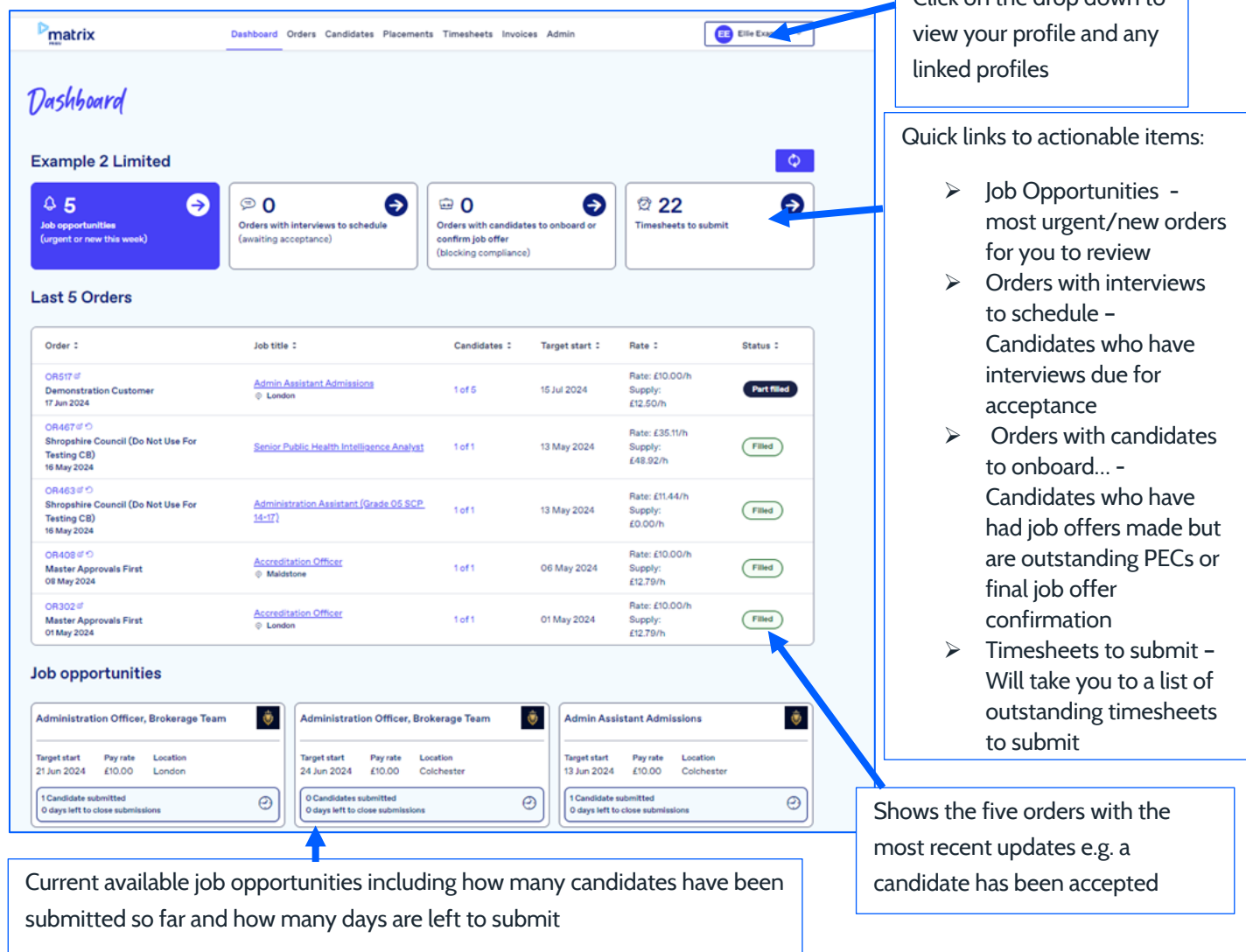
Accepting an interview – <https://share.synthesia.io/6b086b6b-a493-4cc4-9bc3-3c9a3d13df9a>

Submitting a candidate – <https://share.synthesia.io/a56e755b-2af3-4121-8a70-90ad72e6c26a>

Creating a new user – <https://share.synthesia.io/5182d373-5fd6-47c9-8602-dc17b378b6ab>

Submitting a timesheet – <https://share.synthesia.io/88ab5aae-a80a-4309-a046-124e2b0d5923>

Understanding the Dashboard



Click on the drop down to view your profile and any linked profiles

Quick links to actionable items:

- Job Opportunities - most urgent/new orders for you to review
- Orders with interviews to schedule - Candidates who have interviews due for acceptance
- Orders with candidates to onboard... - Candidates who have had job offers made but are outstanding PECs or final job offer confirmation
- Timesheets to submit - Will take you to a list of outstanding timesheets to submit

Shows the five orders with the most recent updates e.g. a candidate has been accepted

Current available job opportunities including how many candidates have been submitted so far and how many days are left to submit

Dashboard Overview:

Example 2 Limited

- 5 Job opportunities (urgent or new this week)
- 0 Orders with interviews to schedule (awaiting acceptance)
- 0 Orders with candidates to onboard or confirm job offer (blocking compliance)
- 22 Timesheets to submit

Last 5 Orders

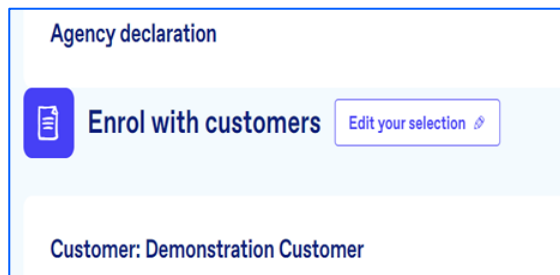
Order #	Job title	Candidates	Target start	Rate	Status
OR517	Demonstration Customer Admin Assistant Admissions London	1 of 5	15 Jul 2024	Rate: £10.00/h Supply: £12.50/h	Part filled
OR467	Shropshire Council (Do Not Use For Testing CB) Senior Public Health Intelligence Analyst London	1 of 1	13 May 2024	Rate: £35.11/h Supply: £48.92/h	Filled
OR463	Shropshire Council (Do Not Use For Testing CB) Administration Assistant / Grade 05 SCP 14-17	1 of 1	13 May 2024	Rate: £11.44/h Supply: £0.00/h	Filled
OR408	Master Approvals First Accreditation Officer Maldstone	1 of 1	06 May 2024	Rate: £10.00/h Supply: £12.79/h	Filled
OR302	Master Approvals First Accreditation Officer London	1 of 1	01 May 2024	Rate: £10.00/h Supply: £12.79/h	Filled

Job opportunities

Administration Officer, Brokerage Team	Administration Officer, Brokerage Team	Admin Assistant Admissions
Target start: 21 Jun 2024 Pay rate: £10.00 Location: London	Target start: 24 Jun 2024 Pay rate: £10.00 Location: Colchester	Target start: 13 Jun 2024 Pay rate: £10.00 Location: Colchester
1 Candidate submitted 0 days left to close submissions	0 Candidates submitted 0 days left to close submissions	1 Candidate submitted 0 days left to close submissions

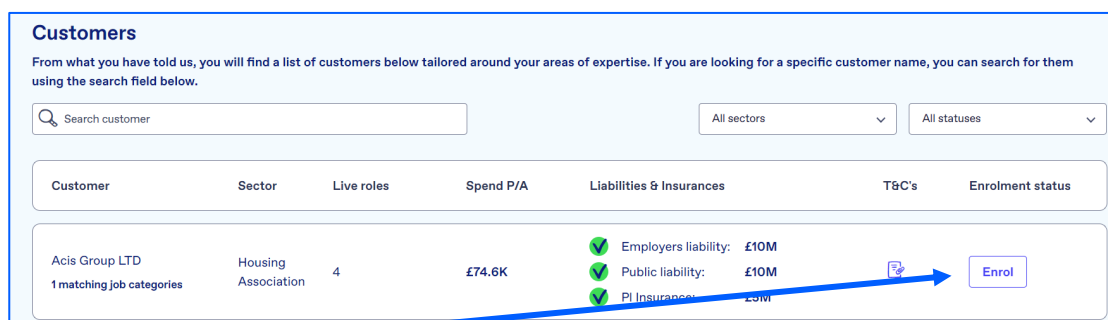
How do I view and amend my enrolments?

To locate your enrolments go to Admin > Organisation Profile. This will take you back into the supplier application. You can then scroll down to the “Enrol with Customers” section and select “Edit your Selection”:

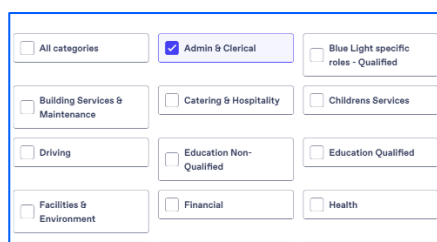


Adding a New Enrolment

On the “Enrol with Customers” page you will see a list of clients available for enrolment, their sector, current live roles, annual spend and if you meet their insurance criteria. On the right-hand side you will have a link to the client terms and your enrolment status.



First click on “Enrol”, this will allow you to select the categories you wish to add for this client:



Once you are happy with your selection, click save.

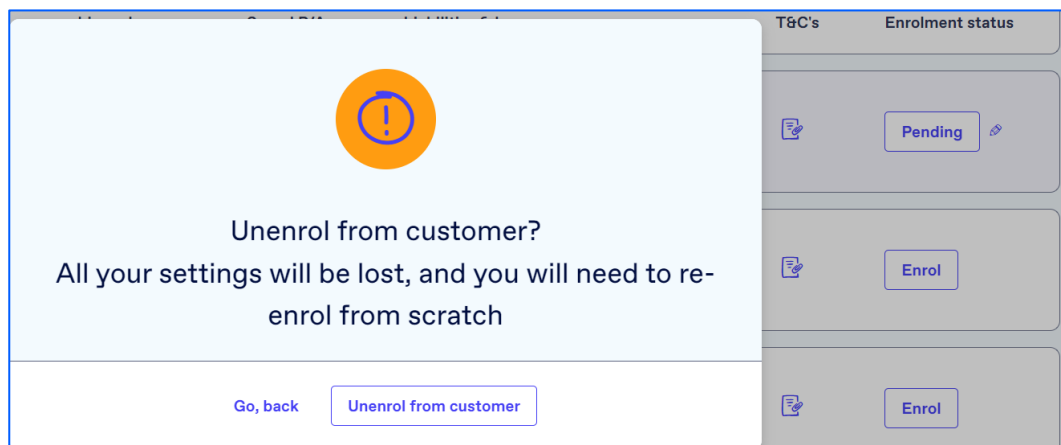
This will update the enrolment status to pending. Next click on the document icon in the T&Cs. This will allow you to read through the terms for this client, if you are happy with this click accept then go back to the main application checklist. If all items are in green then the enrolment is complete.

NB. Should you wish to cancel the enrolment at this stage simply click on the Pending button in the enrolment status column and this will give you the option to un-enrol.

Un-enrolling from a Client

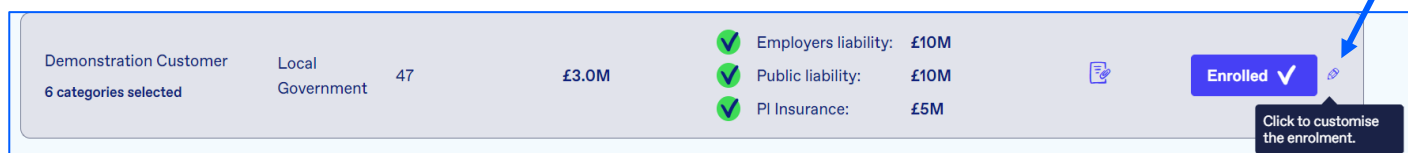
To un-enrol from a client completely, search for the client and then click on the “Enrolled” or “Pending” Button in the enrolment status column, this will then bring up the option for you to Un-enrol. Click on

Un-enrol from customer and this will revert the Enrolment Status to “Enrol” to show that you are no longer enrolled for this customer.

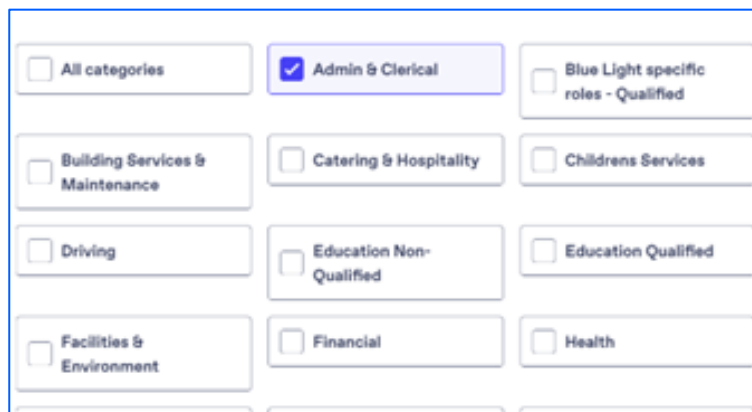


Amending Enrolment Categories

If you only wish to amend a category on an enrolment, click on the pencil icon on the far right hand side of the screen.



This will bring up the categories for this client where you can either tick to add additional categories or untick to remove a category from the enrolment.



Once you are happy with your changes, click save and then you can return to the application checklist.

How do I update my company profile?

Go to Admin > Organisation Profile withing this you can edit any of the sections showing on the Application Checklist. Simply click on the required section or scroll down and select “Edit” to be taken to this section.

Please note that certain details may not be editable if they have been used to generate the self-bill and supplier agreement. If you need to amend details which are greyed out please contact supplier.engagement@teammatrix.com to request these changes.

Where do I find orders?

On your home page you will see “Last Five Orders” - these will be the five orders with recent updates that require your attention e.g. to alert you that a candidate has been updated on this role.

To view all Orders go to the Orders Tab, where you can filter by status or search by job title, client etc:

Example 2 Limited					
Search in the list			All statuses ▼		Create new order +
Order ▼	Job title ▼	Candidates ▼	Target start ▼	Rate ▼	Status ▼
OR502 Demonstration Customer 03 Jun 2024	Administration Officer, Brokerage Team Colchester	0 of 1	24 Jun 2024	Rate: £10.00/h Supply: £12.50/h	Open

The candidates column will show you the number of positions required as well as how many have been filled so far.

If you click on the order number itself (e.g.OR502) this will then take you to the Order Summary where you can view the job details including the weekly hours, rates, job location and job description

What is Required at Candidate Submission?

On the order beneath the job details there will be a section of candidate requirements:

Candidate requirements

Required attributes

Desirable Job Category Compliance

Required documents at candidate submission

Must have Must provide a 2 years of work history

Must have The worker must be eligible to work in the UK

Supporting documents on offer acceptance

Must have Compliance can be configured at numerous levels

Target interview date

11 Jun 2024: Phone

Interview instructions

Tips for interview instruction:
If in-person, where is the interview taking place?

This will be broken down into the documents you need to upload at submission status, if there are any further documents to be uploaded once the candidate has been accepted and any interview date/instructions.

Please make sure to note the number of candidate submissions and the submission deadline for the role as you will not be able to submit beyond this date or over this number:

Agency distribution

Agencies receiving the order

All agencies ⓘ

Maximum number of CV's per agency

3

Supplier submission deadline

06 Jun 2024

View or submit candidates

How do I submit a candidate?

On the order click on View or Submit candidates. This will then take you to the candidate page for this order where you can search from your list of current candidates or add a brand new one:

ORDER OR517  Open 

Candidates

Job title: **Admin Assistant Admissions** Start: **15 Jul 2024** Target rate: **£10.00/h** Supply bill: **£12.50/h** [View job description](#)

Search candidates



[Review candidate details](#) [Add new candidate +](#)

To add an existing candidate select them from the search candidates drop down. For a new candidate click on “Add New Candidate” and fill in their details ensuring all fields with a red asterisk are completed:

Candidate details

* First Name

* Last Name

* Phone Number

 +44 

* Email address

* Home address

Find address

[Enter address manually](#)

* National insurance number

NB. Email address must be unique to the candidate and correct as this will enable their access to the platform. Please note that candidates will only receive a log-in link for the platform once they have a placement created.

You will then go through to candidate requirements where you can upload the documents required for the submission stage:

Please declare that either you have the required documentation or that the candidate does or does not possess the requested skill set for the job role.

Must provide a 2 years of work history

Mandatory  upload on submission 

☐ No ☒ Yes

The worker must be eligible to work in the UK

Mandatory  upload on submission 

☐ No ☒ Yes

Compliance can be configured at numerous levels

Mandatory  upload at onboarding

☐ No ☒ Yes

Job Category Compliance

Desirable

☐ No ☒ Yes

Supporting documents

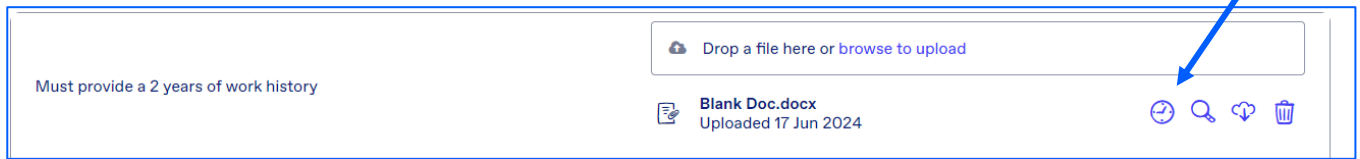
Please upload the requested supporting documents.

Must provide a 2 years of work history

 Drop a file here or browse to upload

Documents marked as “Upload at onboarding” or “Desirable” will not be required unless the candidate is progressed for the role.

NB. If a document requires an expiry date please click on the clock icon on the right hand side:



Must provide a 2 years of work history

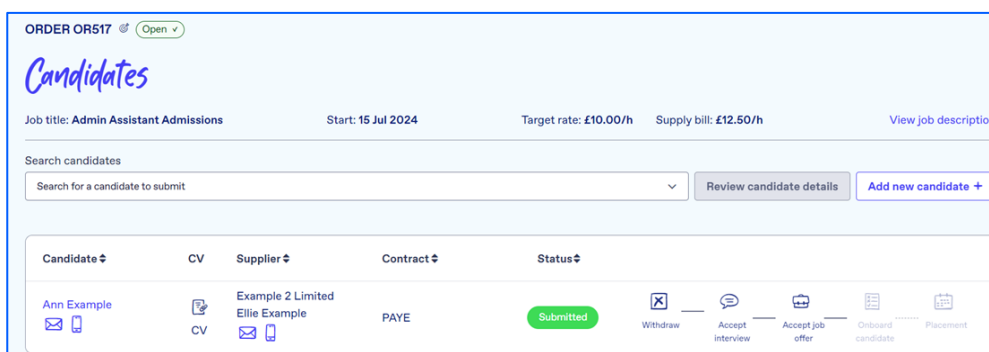
Drop a file here or [browse to upload](#)

Blank Doc.docx
Uploaded 17 Jun 2024

Icons: Clock, Search, Download, Delete

This will then bring up the calendar for you to set the expiration date of the document.

Once all required documents are uploaded you can then go through to submit candidate where you can review the application and submit them for review against the order. They will then appear as below:



ORDER OR517 [Open](#)

Candidates

Job title: Admin Assistant Admissions Start: 15 Jul 2024 Target rate: £10.00/h Supply bill: £12.50/h [View job description](#)

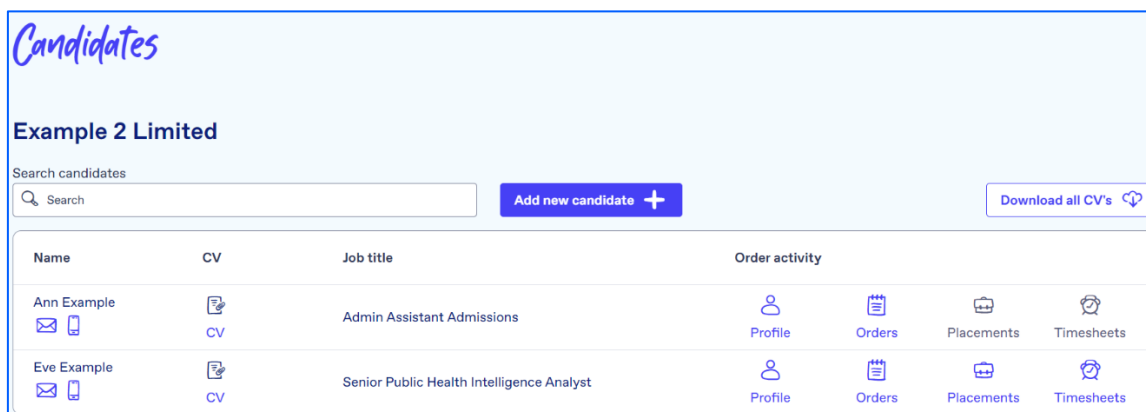
Search candidates

Search for a candidate to submit [Review candidate details](#) [Add new candidate +](#)

Candidate	CV	Supplier	Contract	Status
Ann Example  	 CV	Example 2 Limited Ellie Example  	PAYE	Submitted     

Can I still create candidate user profiles separate to the orders tab?

Yes if you have a potential candidate who you want to search for roles for, these can still be added within the “Candidates Tab”. Simply click on “Add New Candidate” and complete their details. They will then appear in your candidates’ list for orders:



Candidates

Example 2 Limited

Search candidates

Search [Add new candidate +](#) [Download all CV's](#)

Name	CV	Job title	Order activity
Ann Example  	 CV	Admin Assistant Admissions	 Profile  Orders  Placements  Timesheets
Eve Example  	 CV	Senior Public Health Intelligence Analyst	 Profile  Orders  Placements  Timesheets

On the candidate tab you will then also be able to view any placements they have, orders they have been submitted against and their profile. If they have not been submitted these will be greyed out as per the below example:

Search candidates

Search

Add new candidate

Download all CV's

Name	CV	Job title	Order activity			
Ann Example	CV	Admin Assistant Admissions	Profile	Orders	Placements	Timesheets
Bea Example	CV		Profile	Orders	Placements	Timesheets
Eve Example	CV	Senior Public Health Intelligence Analyst	Profile	Orders	Placements	Timesheets

What do the different candidate stages mean?

Submitted: Candidate has been submitted successfully and is pending review:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV	Example 2 Limited Ellie Example ✉ 📱	PAYE	Submitted	Withdraw	Accept interview	Accept job offer	Onboard candidate	Placement	

Pending Interview: Candidate has been offered an interview by the hiring manager. Please click on Accept Interview to accept interview or request another time:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV	Example 2 Limited Ellie Example ✉ 📱	PAYE	Pending Interview	Withdraw	Accept interview	Accept job offer	Onboard candidate	Placement	

Once a suitable time has been arranged and accepted the status will update to “Interview Accepted”:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV	Example 2 Limited Ellie Example ✉ 📱	PAYE	Interview accepted	Withdraw	Accept interview	Accept job offer	Onboard candidate	Placement	

Pending Approval: An offer has been made but is pending approval from the client sponsor before it can progress to placement:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV	Example 2 Limited Ellie Example ✉ 📱	PAYE	Pending approval	Withdraw	Accept interview	Accept job offer	Onboard candidate	Placement	

Onboarding: The candidate has been offered the role, you will now need to click “Accept job offer” and complete the candidate onboarding:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV	Example 2 Limited Ellie Example ✉ 📱	PAYE	Onboarding	Withdraw	Accept interview	Accept job offer	Onboard candidate	Placement	

Once you have uploaded the documents and reviewed the submission, click accept job offer and the status will update to pending verification:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV 📄	Example 2 Limited Ellie Example ✉ 📱	PAYE	Pending verification	Withdraw ✕	Accept interview 💬	Accept job offer 📄	Onboard candidate 📅	Placement 📅	

This will then be reviewed by the Matrix team. If further information is required this will move to “Failed Compliance”:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV 📄	Example 2 Limited Ellie Example ✉ 📱	PAYE	Failed compliance	Withdraw ✕	Accept interview 💬	Accept job offer 📄	Onboard candidate 📅	Placement 📅	

Click on “Onboard Candidate” where you can view the pre-employment checks alongside the reasons these have failed review. You can then upload new documents and re-submit this for checks. The status will then revert to Pending Verification.

Document Name	Document added	Notes	Status
Must provide a 2 years of work history	Drop a file here or browse to upload Blank Doc.docx Uploaded 17 Jun 2024 Expires 4 Jul 2027	Incorrect Document	Action required ⚠
The worker must be eligible to work in the UK	Drop a file here or browse to upload Blank Doc.docx Uploaded 17 Jun 2024 Expires 6 Jun 2027		Verified ✓ 17 Jun 2024

Supplier Confirmation: The pre-employment checks have now been passed and you now need to confirm the job offer is still acceptable to the candidate. Click on “Onboard Candidate” to review the offer details and then confirm the job offer:

Candidate ↕	CV	Supplier ↕	Contract ↕	Status ↕						
Ann Example ✉ 📱	CV 📄	Example 2 Limited Ellie Example ✉ 📱	PAYE	Supplier confirmation	Withdraw ✕	Accept interview 💬	Accept job offer 📄	Onboard candidate 📅	Placement 📅	

Once confirmed the candidate status will then move to “Successful” and a placement will appear linked to this order as below:

Job details

Candidates

Placements 1

ORDER OR517

Part filled

Candidates

Job title: Admin Assistant Admissions

Start: 15 Jul 2024

Target rate: £10.00/h

Supply bill: £12.50/h

View job description

Search candidates

Search for a candidate to submit

Review candidate details

Add new candidate +

Candidate	CV	Supplier	Contract	Status	
Ann Example	CV	Example 2 Limited Ellie Example	PAYE	Successful	Withdraw Accept interview Accept job offer Onboard candidate Placement

Other Statuses:

- Withdrawn – Candidate has been withdrawn from the role
- Rejected/Unsuccessful – Candidate has not been selected for the role
- Finish Application – The Candidate submission process has not been completed

When is a placement created?

A placement is created through the candidate submission process. Once pre-employment checks have been completed you will be asked to confirm the job offer. Once this has been confirmed a placement will be created which you will be able to view on the order or in the placement tab. The placement reference will be Order Number/1 etc...

At this stage your candidate will then receive an email from the system to allow them to set their password.

Placement Pre-Employment Checks

When the placement pre-employment documents reach their expiry date, their status will update to “Compliance Expired” as below:

Placement	Customer	Worker	Rates	Start & end	Status	
OR1/1 Accreditation Officer	Demonstration Customer Demo Manager	Worker Name	Rate: £10.00/h Supply: £13.86/h	06 May 2024 - 19 May 2024	Compliance expired	View timesheets

To update these documents, go into the placement and scroll down to the Worker Documentation section:

Worker documentation

Required attributes

Yes

Must provide a 2 years of work history

Expired

Blank Doc.docx

Uploaded 18 Apr 2024
Expires 24 Jul 2024

Documents with a status of “Expired” will need to be updated. Click on the red clock which will bring up the below pop up to allow you to upload a new document:

Expiring file

New file

Blank Doc.docx

Uploaded 17 Jun 2024

Expiring file

Test Doc.docx

Uploaded 17 Jun 2024
Expires 15 Jun 2025

Cancel

Upload

If following the review by Matrix the placement status remains in “Compliance Expired” this means that one of the new documents has failed review. Go back into the placement and check for any documents with a status of “Action Required”, these will be flagged as below with a note to advise on the corrections needed:

Yes

The worker must be eligible to work in the UK

Action required

Test Doc.docx

Uploaded 17 Jun 2024
Expires 15 Jun 2025

Note

Incorrect Document

Once all checks have been re-verified the placement will move back to active status

How do timesheets get created?

Timesheets no longer need to be created manually. These will be generated automatically for live placements week by week. Please note that the generation day will depend on the client.

teammatrix.com

CONFIDENTIAL | Page: 10

Once the timesheet has been generated this will show as a draft timesheet for your candidate to input their hours and submit these for approval.

If the candidate has not completed any hours that week there will also be an option to go to the draft timesheet and click “Week Not Worked” to submit the zero-hour timesheet.

What is the invoicing process?

Matrix operate a self-billing process wherein the invoices will be generated on the system based on the approved timesheets for that week, therefore there is no need for you to raise invoices directly.

The invoicing window covers timesheets approved between Wednesday 00:00 and Tuesday 23:59, we would advise to submit timesheets by Monday afternoon where possible to allow time for these to be approved and for any corrections to be made prior to the invoicing cut off.

Any timesheets approved after Tuesday 23:59 will still be paid however they will be included in the invoicing run for the following week.

Your self-bill invoice for the week will usually be available for you to download on a Friday and will be paid as per the terms outlined in your supplier agreement/supplier addendum schedule.

What do the different role types mean when creating user profiles?

When creating a candidate their role type will automatically default to that of “Worker”

For other users you will have three options: Super Admin, Consultant, and Finance.

Super Admin – Full access, can edit the company profile, manage enrolments, users, view reports, invoices etc.

Consultant – Can manage users/candidates but does not have access to the company profile/invoices.

Finance – Can create and edit timesheets, have access to candidates, organisation, profile and users but can only view and not edit.

Where can I find the users set up for my company?

The full list of users can be found by going to Admin > User Directory

For a list of workers only you can go to the Candidates tab which will show the list of candidates you have created and any orders you have submitted them against.

How do I send a password reset?

To action a password reset for either a colleague or worker, go to Admin > User Directory > Search the User who requires a reset.

Click on their profile and scroll down to the contact details section. Here you should find a link to send a new password link:

User profile - Admin view

Profile picture

Drop a file here or [browse to upload](#)

Contact details

* Email address

democustomer1234@outlook.com

Send reset password link

Where do I find reports?

Reports are now available under the Admin Tab, if you go to Admin > Reports > Supplier you will then be shown a dropdown of reports that you can e.g. Supplier Timesheets:

Supplier reports

Report

Supplier Timesheets

Date Range

Please select a report to download

Candidates

Supplier Contacts

Supplier Timesheets

Cancel

Download