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/c960faf4-781a-4872-9d76-e163e9f25de0

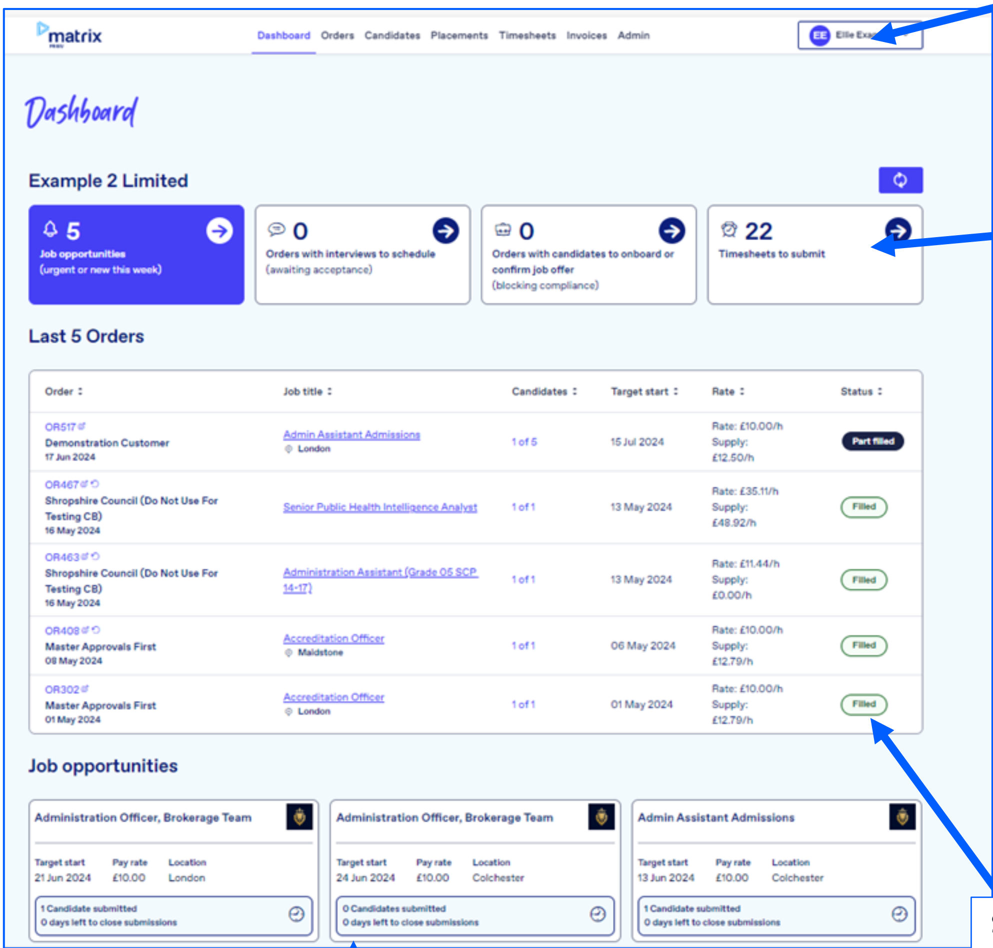
Accepting an interview – https://share.synthesia.io/6b086b6b-a493-4cc4-9bc3-3c9a3d13df9a

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:

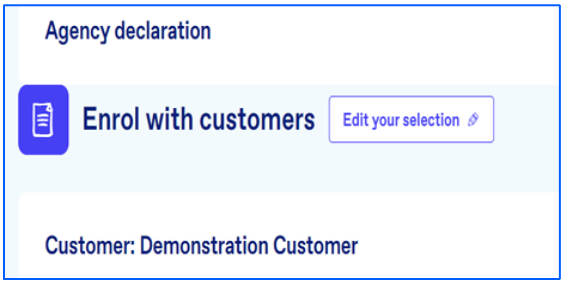
- Job Opportunities - most urgent/new orders for you to review
- Orders with interviews to schedule – Candidates who have interviews due for acceptance
- Orders with candidates to onboard... - Candidates who have had job offers made but are outstanding PECs or final job offer confirmation
- Timesheets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

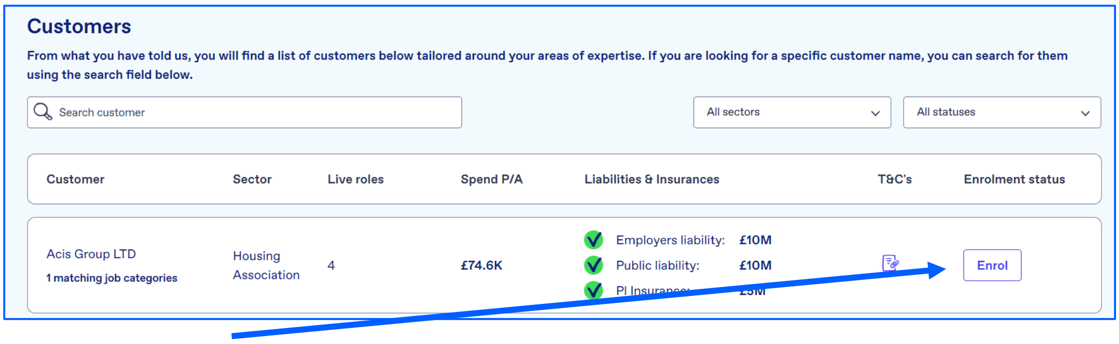
How do I view and amend my enrolments?

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":

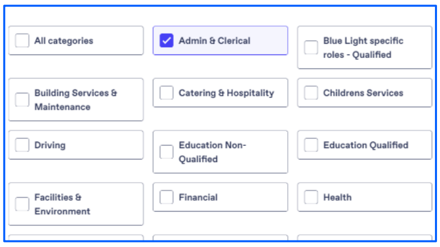


Adding a New Enrolment

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.

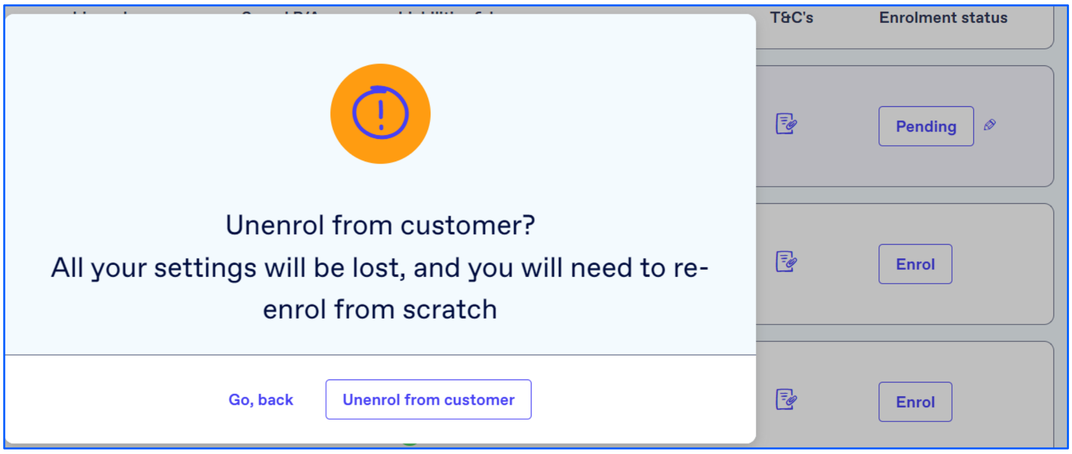
This will update the enrolment status to pending. Next click on the document icon in the T&Cs. This will allow you to read through the terms for this client, if you are happy with this click accept then go back to the main application checklist. If all items are in green then the enrolment is complete.

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

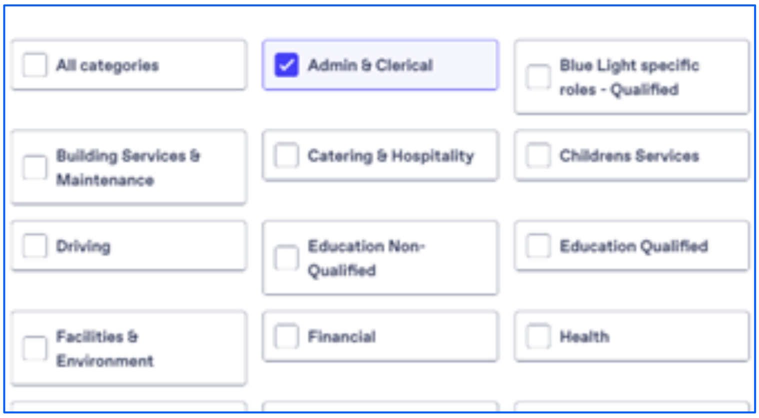
Un-enrol from customer and this will revert the Enrolment Status to "Enrol" to show that you are no longer enrolled for this customer.



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?

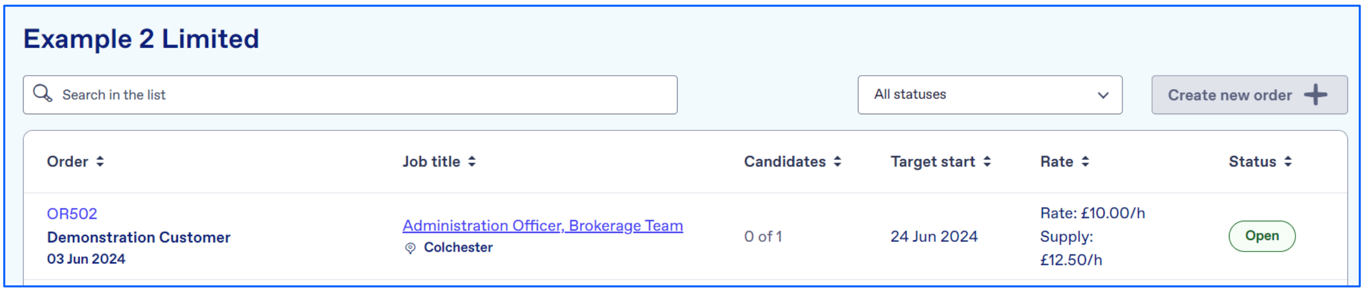
Go to Admin > Organisation Profile withing this you can edit any of the sections showing on the Application Checklist. Simply click on the required section or scroll down and select "Edit" to be taken to this section.

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:



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?

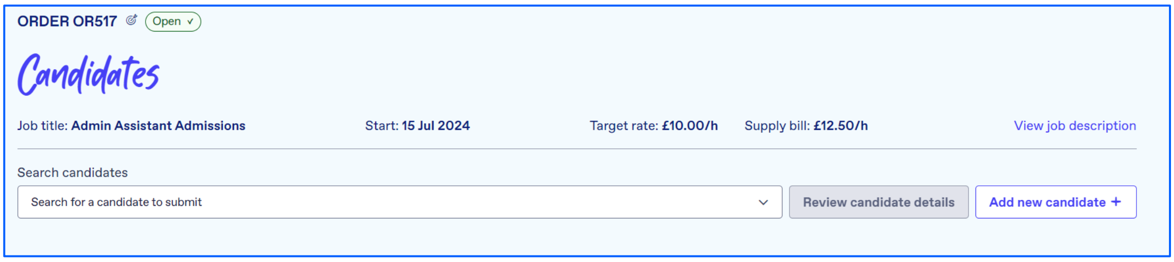
On the order beneath the job details there will be a section of candidate requirements:

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.

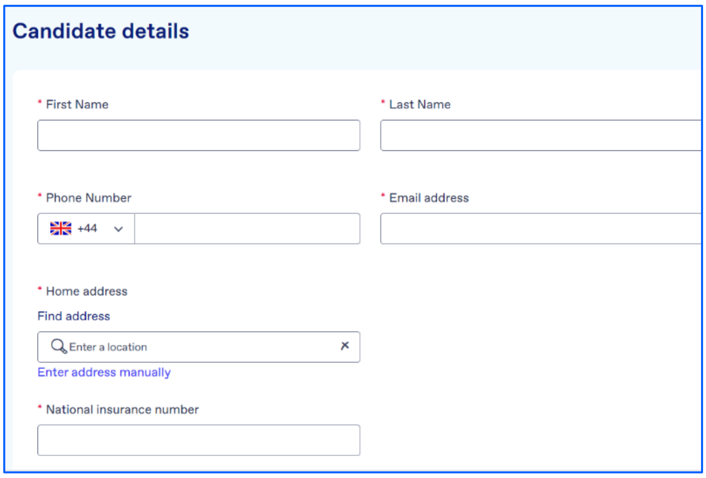
Please make sure to note the number of candidate submissions and the submission deadline for the role as you will not be able to submit beyond this date or over this number:

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:

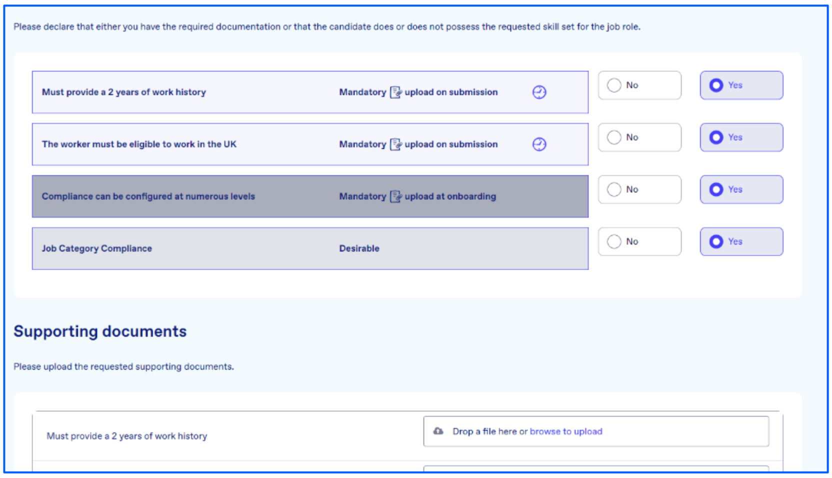


To add an existing candidate select them from the search candidates drop down. For a new candidate click on "Add New Candidate" and fill in their details ensuring all fields with a red asterisk are completed:



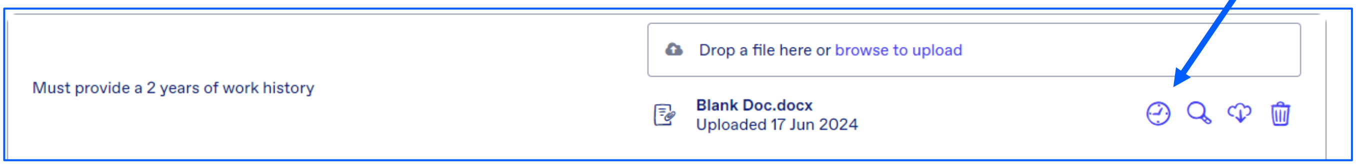
NB. Email address must be unique to the candidate and correct as this will enable their access to the platform. Please note that candidates will only receive a log-in link for the platform once they have a placement created.

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



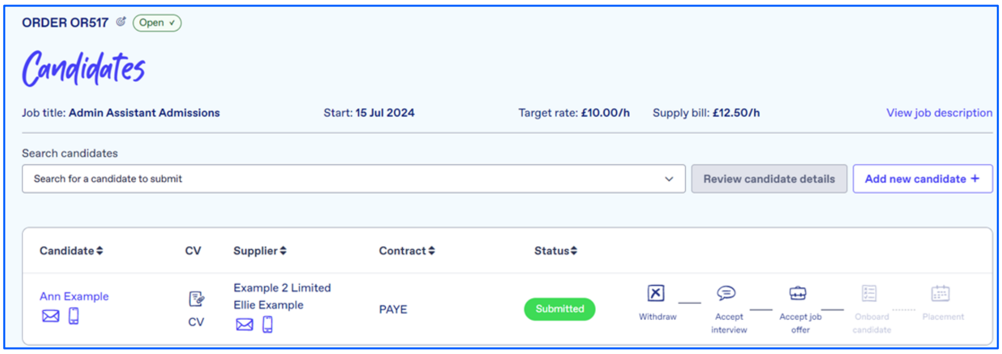
Documents marked as "Upload at onboarding" or "Desirable" will not be required unless the candidate is progressed for the role.

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



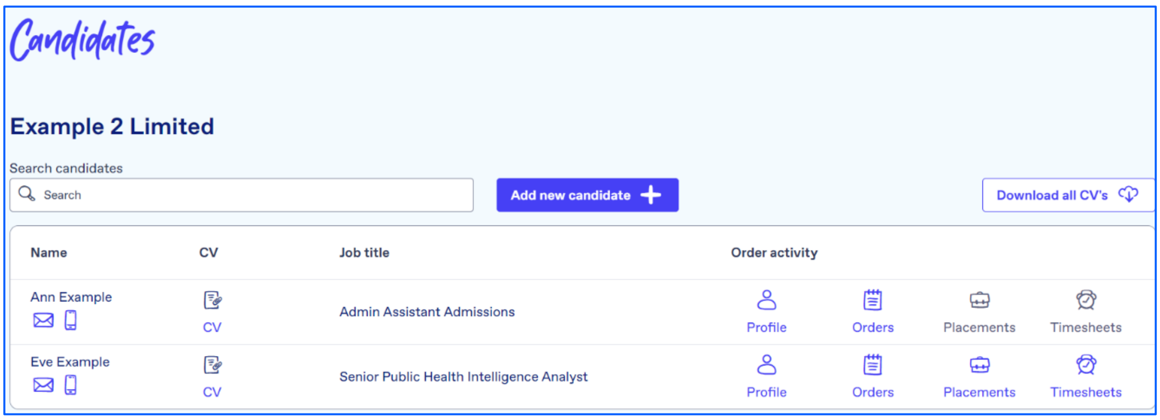
This will then bring up the calendar for you to set the expiration date of the document.

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:



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:



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

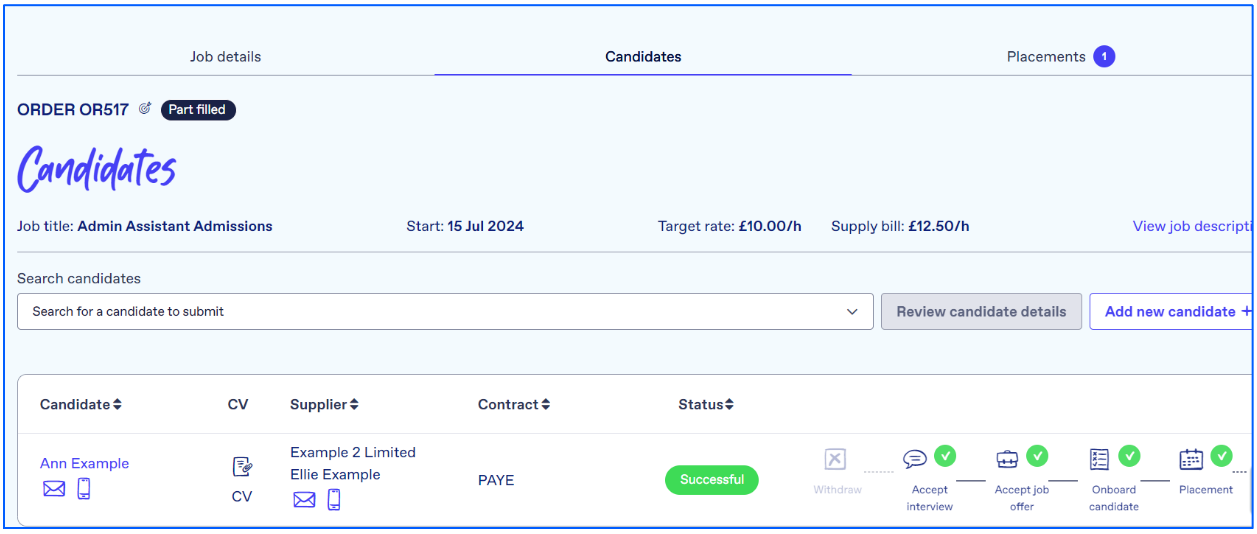
Click on "Onboard Candidate" where you can view the pre-employment checks alongside the reasons these have failed review. You can then upload new documents and re-submit this for checks. The status will then revert to Pending Verification.

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:



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?

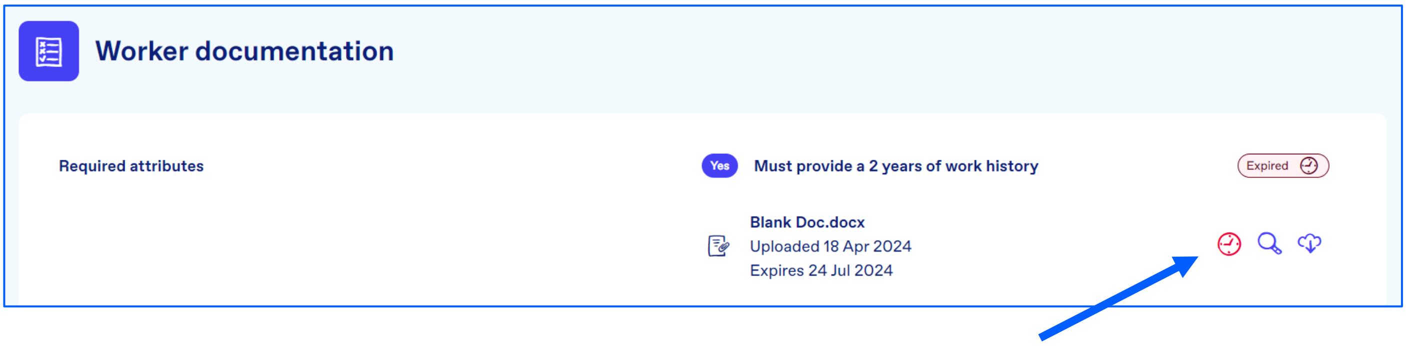
A placement is created through the candidate submission process. Once pre-employment checks have been completed you will be asked to confirm the job offer. Once this has been confirmed a placement will be created which you will be able to view on the order or in the placement tab. The placement reference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

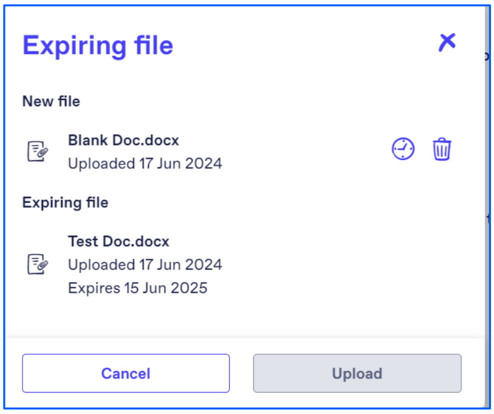
Placement Pre-Employment Checks

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

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



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:



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:

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.

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?

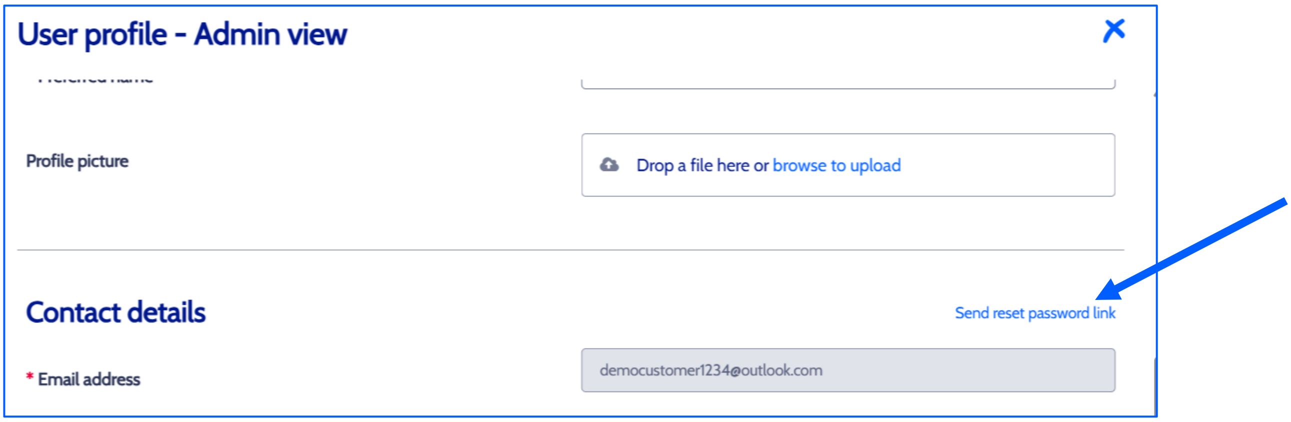
The full list of users can be found by going to Admin > User Directory

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:



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: