



Placement and Timesheet Management

Client Guide - Agency Workers

v3.1



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Overview

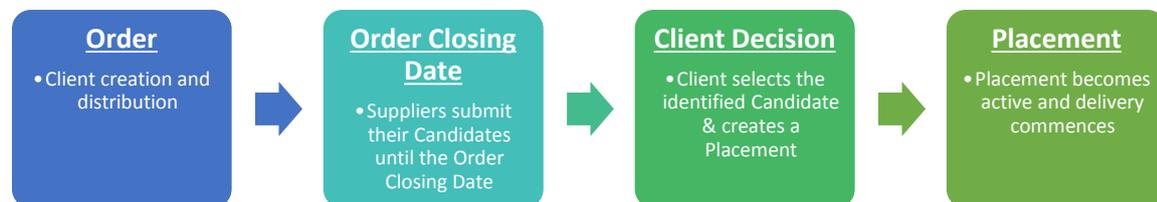
The Matrix-CR.Net system is a sophisticated web based technology platform used by clients and suppliers to aid in the efficient and fair procurement of services through a 12 step process.

Orders (client service needs) and Candidates (supplier service bids) within the system are broken down into two separate metrics: Attributes and Price.



The client inputs to what percentage these two metrics will account for in the complete Candidate score, which defines how the Matrix-CR.Net system will rank those Candidates into a shortlist.

During the Order creation and distribution period, a client also sets out timescales that outline the subsequent periods where Candidates can be reviewed.



The client will review the Candidates as they are submitted, interview if they wish and reject any non-compliant Candidates.

Once the Order Closing Date has passed, the client will be able to progress their chosen Candidate through to the Placement (contract) step and this finalises the procurement process, after which the service delivery can commence.

This guide is a step-by-step walk through of:

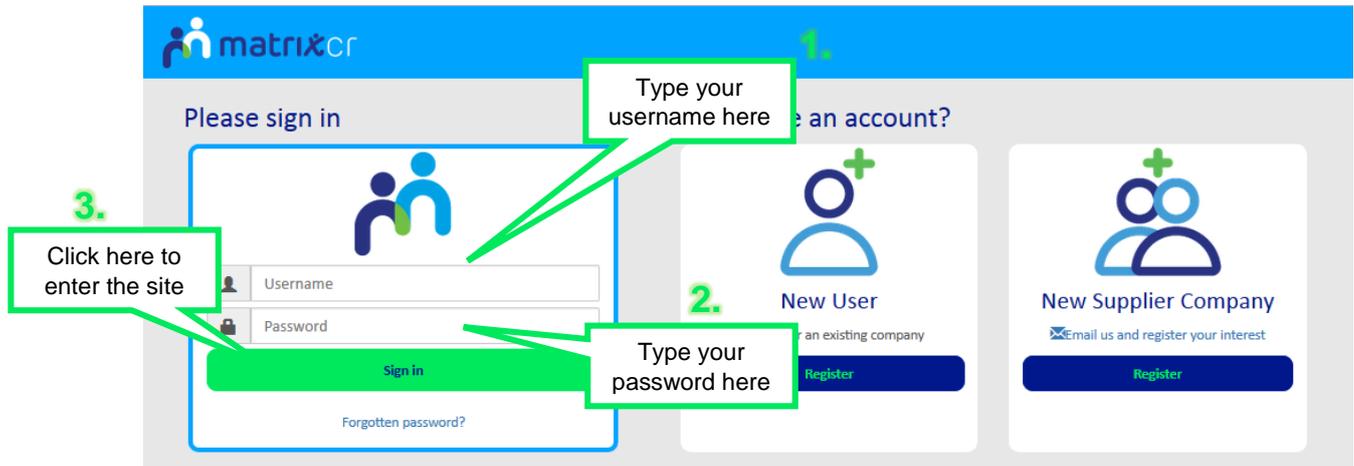
- ➔ How to create a new Placement
- ➔ Placement messaging
- ➔ Pre-employment Checks

Glossary

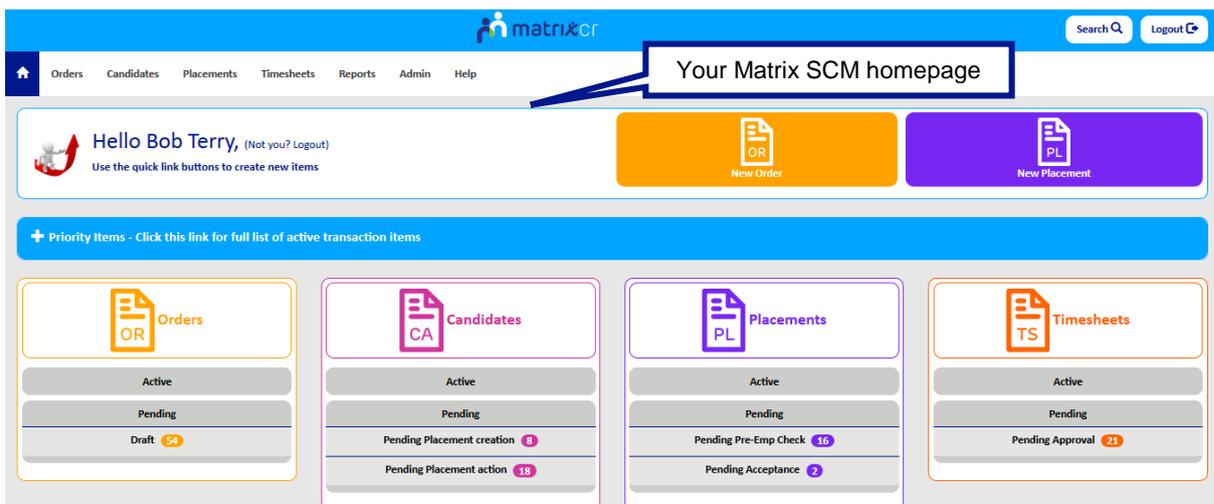
Terminology	Description
Order	A client request for a service needed, containing service details
Candidate	Supplier's offer submission against a client's Order criteria
Category	Type of service, e.g. Training Services, Agency Workers
Job Title	Service title and summary of any standard service details A Job Title will auto-populate sections of the Order
Location	Where the service will be carried out
Client Manager	The Matrix-CR.Net user procuring the service through the system
Cost Codes	Budget from which the service will be paid
Profile	Free-text Order criteria
Attributes	Pre-configured Order criteria, classified into Pre-Employment Checks, Skills and Qualifications
Distribution	Circulation of an Order
Weightings	Client's prescribed values to Order sections
Draft	Saved workings but process incomplete
Order Close Date	The date an Order closes to further Candidates

Login

1. Login to your Matrix-CR.Net system:

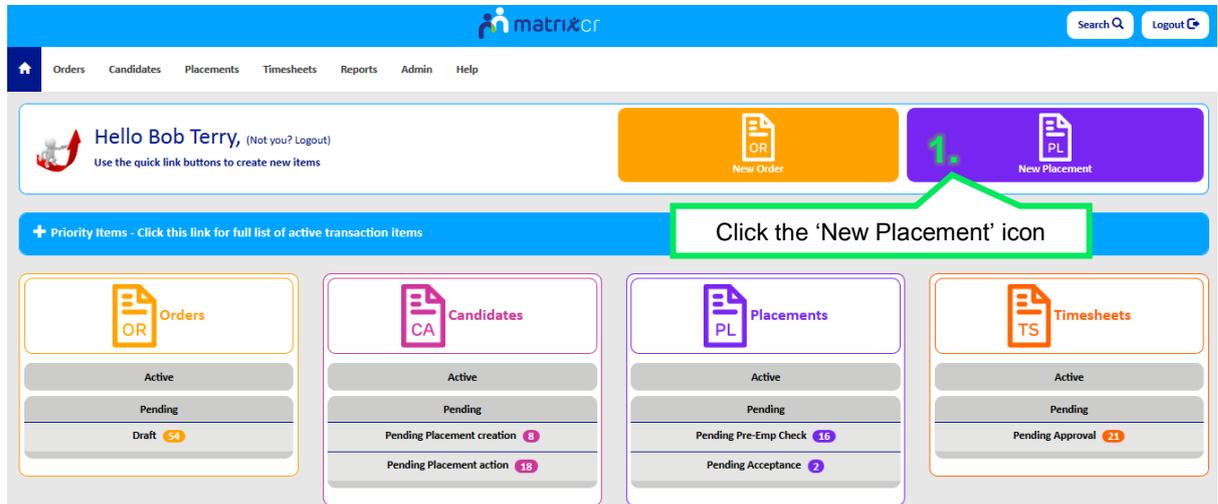


2. You will be taken directly to your Matrix-CR.Net homepage:



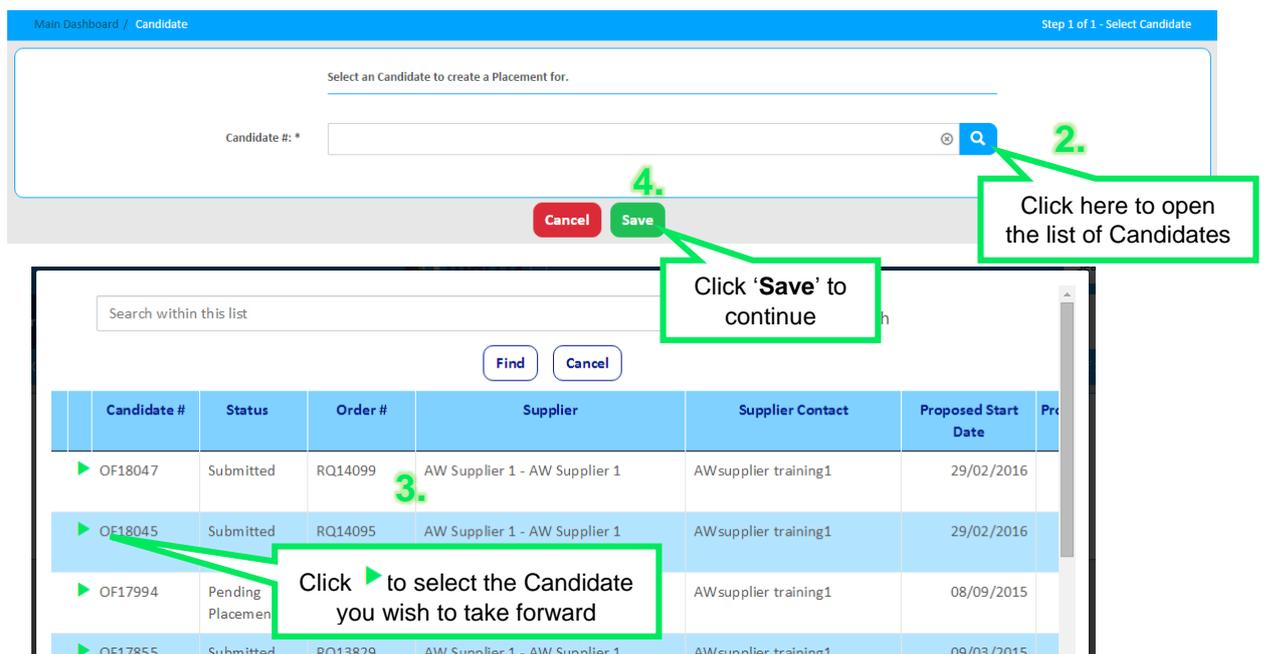
Creating a Placement

1. On your homepage click into the 'New Placement' icon



1. Click the 'New Placement' icon

2. Select the Candidate you wish to create a Placement with from the list of available objects



2. Click here to open the list of Candidates

4. Click 'Save' to continue

3. Click ► to select the Candidate you wish to take forward

Candidate #	Status	Order #	Supplier	Supplier Contact	Proposed Start Date	Pre
OF18047	Submitted	RQ14099	AW Supplier 1 - AW Supplier 1	AWsupplier training1	29/02/2016	
OF18045	Submitted	RQ14095	AW Supplier 1 - AW Supplier 1	AWsupplier training1	29/02/2016	
OF17994	Pending Placemen			AWsupplier training1	08/09/2015	
OF17855	Submitted	RQ13829	AW Supplier 1 - AW Supplier 1	AWsupplier training1	09/03/2015	

3. Review the information which has been transferred into your Placement from the Order and Candidate objects and add additional information if necessary:

Placement Step 1 of 1 - Create New Placement

+Order

+Candidate

Supplier: AW Supplier 1 - AW Supplier 1

Worker: Adam Fenton

Supplier Contact: AWsupplier training1

Client Manager: * Bob Terry

Level Name: * Refuse and Recycling

(Hover over Caption for Level Structure)

Additional Information:

Start Date: 29/02/2016

End Date: 30/03/2016

Timesheet Type: Multi-Timesheet

(What sort of Timesheet strategy is needed ?)

Timesheet Type: Multi-Timesheet

(What sort of Timesheet strategy is needed ?)

Cost Codes: * CR001

Cancel Save

Supplier and Candidate information.

Your information.

1. Add any additional information about this Placement for the supplier to review.

2. Start Date, End Date and times can be edited if necessary.

Method of Timesheet submission for this Placement.

3. Cost codes can be edited if necessary using the  icon & select the correct 'Cost Code' by clicking the  icon.

4. Click 'Save' to complete.

Pre-Employment Checks

1. Once created the Placement will be sent to Matrix SCM for all Candidate documents to be checked/reviewed prior to the Placement being sent to the supplier for acceptance:

Placement - # SA9640 (Status: Pending Pre-Employment Check)

Refresh

Current Status:

The creation of this Placement is Pending Pre-Employment Checks.

Next Steps:

Please wait for the Pre-Employment Checks to be completed.

2. Once the Pre-Employment check have been completed:
 - a. If all document are correct the Placement will be sent to the supplier for them to review and either:
 - i. Accept – The placement will become active and service delivery can commence.

Placement - # SA9614 (Status: Pending Supplier Acceptance)

Refresh

Current Status:

The creation of this Placement is currently Pending Supplier Acceptance.

Next Steps:

Please wait for the supplier to review and accept.

- ii. Decline – The supplier is unable to deliver the Placement as outlined. You would then need to complete the same process with your second ranked Candidate within your shortlist.

Placement - # SA9614 (Status: Declined)

Refresh

Current Status:

This Placement has been Declined (To view the reason why please use the 'Activity' link in the 'Other Items' section).

Next Steps:

No further action is required / available for this assignment.

Placement - # SA9614 (Status: Declined)




Placement # :	SA9614
Job Title :	Finance Officer
Supplier :	AW Supplier 1 - AW Supplier 1
Client :	CR Test Client
Client Location :	CR Test Client
Level 1 :	Young People Social Care

Links

Printable Detail

Other Items

Activity

Documents 1

Notes 0

See supplier's comments as to why they declined the Placement in the 'Activity' link

- b. If the Candidate documents are incorrect Matrix SCM will notify the supplier that they need to upload new documents

Placement - # SA9640 (Status: Pending Pre-Employment Check)

Refresh

Current Status: The creation of this Placement is Pending Pre-Employment Checks.	Next Steps: Please wait for the Pre-Employment Checks to be completed.
--------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------

Note: If a supplier fails to upload the correct documents the Placement will be suspended and Matrix SCM will contact you to discuss creating a new placement with your next appropriate Candidate.

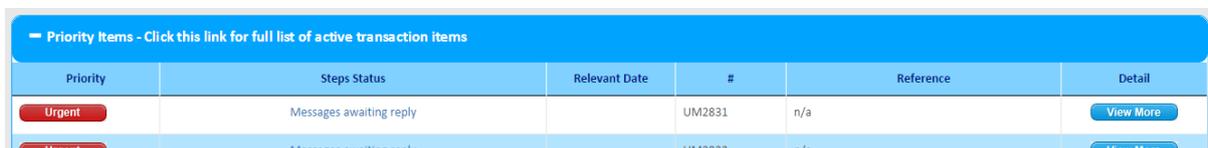
Placement Messaging

Once you have created a Placement a supplier can send you Placement messages to clarify points and ask additional questions.

1. If a supplier sends you a message you will receive an email notification:



The message will also display on your 'Priority Items' list:

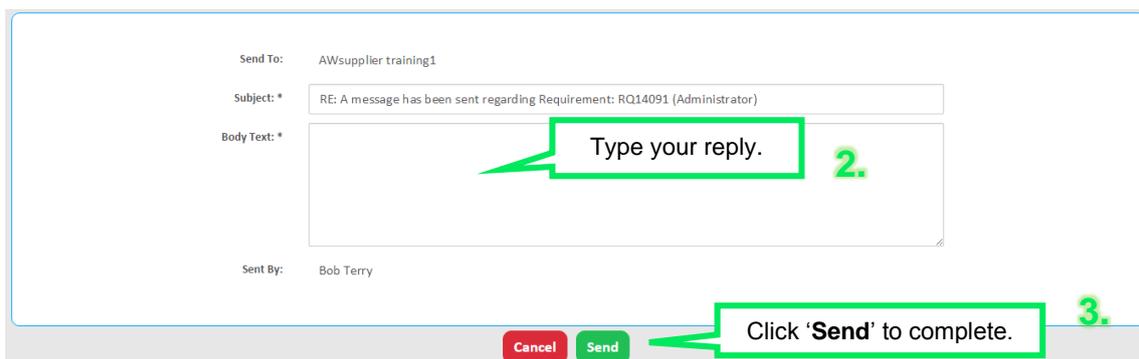


Priority	Steps Status	Relevant Date	#	Reference	Detail
Urgent	Messages awaiting reply		UM2831	n/a	View More
Urgent	Messages awaiting reply		UM2833	n/a	View More

2. To reply, click 'View More' from your priority items list or 'click here' on your notification email. You will be taken to the message:



3. Draft a response:



Send To: AWsupplier training1

Subject: * RE: A message has been sent regarding Requirement: RQ14091 (Administrator)

Body Text: *

Sent By: Bob Terry

Cancel Send

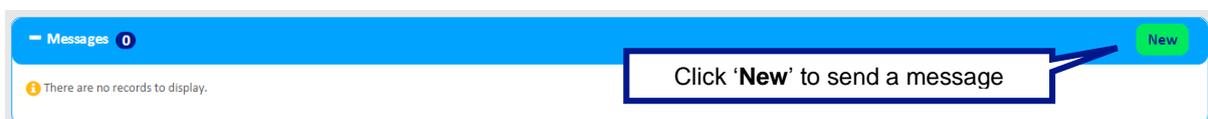
Type your reply.

2.

Click 'Send' to complete.

3.

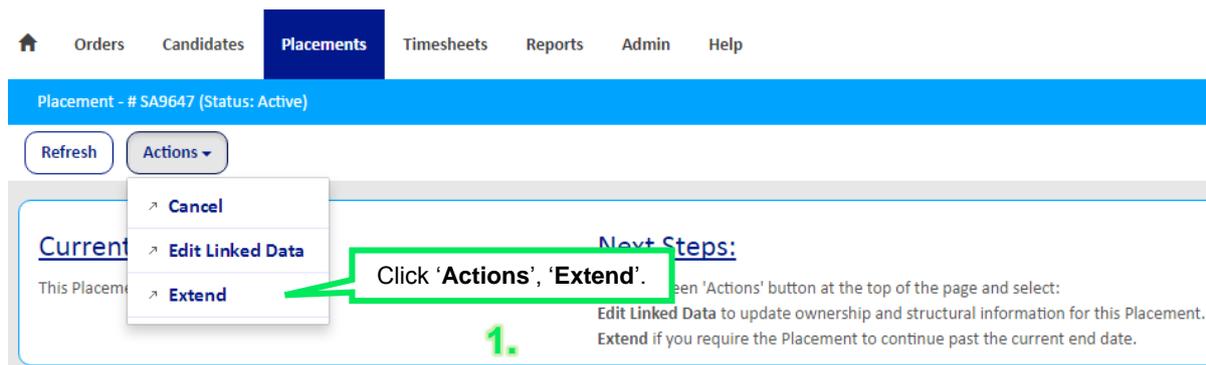
Note: You can also send the supplier a message using the messages field on the Placement summary page



Placement Extensions

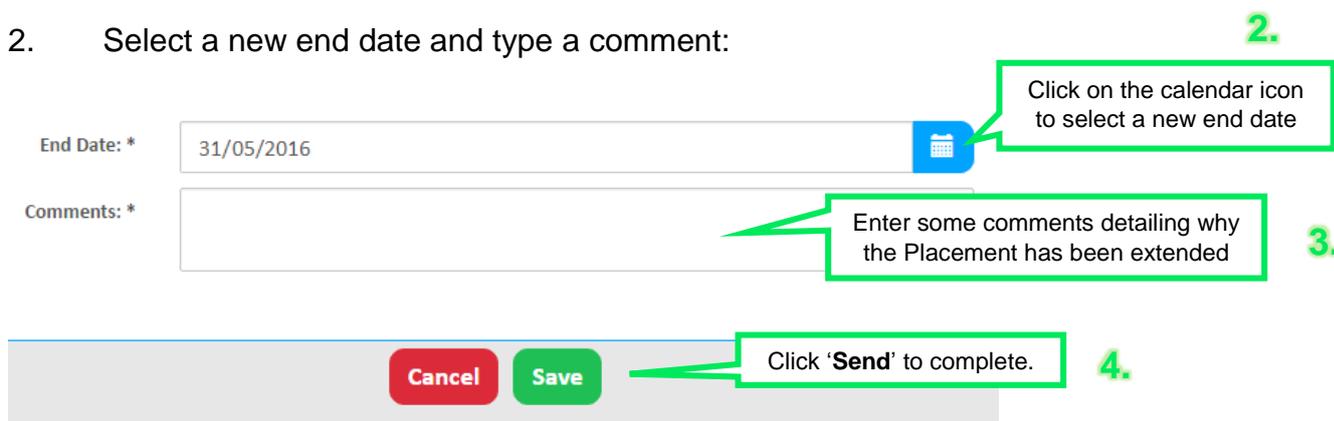
Placements nearing completion can be extended by setting a new end date. This means that the Placement will remain active.

- From the Placement summary page, click on the 'Actions' button and select 'Extend'



The screenshot shows the 'Placements' tab selected in the navigation bar. Below the navigation bar, there is a blue header for 'Placement - # SA9647 (Status: Active)'. Underneath, there are 'Refresh' and 'Actions' buttons. The 'Actions' dropdown menu is open, showing options: 'Cancel', 'Edit Linked Data', and 'Extend'. A green callout box points to the 'Extend' option with the text 'Click 'Actions', 'Extend''. Below the dropdown, there is a 'Next Steps' section with instructions: 'Click 'Actions' button at the top of the page and select: Edit Linked Data to update ownership and structural information for this Placement. Extend if you require the Placement to continue past the current end date.'

- Select a new end date and type a comment:



The screenshot shows the 'End Date' field with the value '31/05/2016' and a calendar icon. A green callout box points to the calendar icon with the text 'Click on the calendar icon to select a new end date'. Below the 'End Date' field is a 'Comments' text area. A green callout box points to the text area with the text 'Enter some comments detailing why the Placement has been extended'. At the bottom of the form, there are 'Cancel' and 'Save' buttons. A green callout box points to the 'Save' button with the text 'Click 'Send' to complete.'

The extension will be added to the 'Extensions' panel on the Placement summary page:

Extensions 2						New	Export
Start Date	End Date	Status	Comments	Submit	Withdraw		
30/06/2016	07/07/2016	Pending Approval	Placement extended due to staff illness.	Submit	Withdraw		

Placement Extension Approval

The Placement extension may require approval from a manager. Click on **Extension Approvers** to view who the names of these approvers.

supplier

Placement #: SA9647
 Job Title: Administrator
 Supplier: AW Supplier 1 - AW Supplier 1
 Client: CR Test Client
 Client Location: Pennycrest Way
 Level 1: Refuse and Recycling
 Status: Active
 Order #: RQ14134
 Candidate #: OF18086

Worker: Adam Fenton

Other Items

Activity

Change Order Approvers **1**

Documents **7** Extension Approvers **2**

Notes **0** Notifiers **0**

Permissions **0** Rate Ranges **0**

Click here to view the extension approvers

If you are an assigned client approver, you will receive an email to advise you that an extension is pending your approval.

1. Review the extension details in the **Extensions** panel on the Placement summary page:

Extensions 2 Export					
Start Date	End Date	Status	Comments	Approve	Reject
30/06/2016	07/07/2016	Pending Approval	Placement extended due to staff illness.	Approve	Reject

Click here to view more information about the extension

1.

Placement - # SA9647 (Status: Active) / Extension

Refresh Actions

Created By: Bob Terry

Updated By: Bob Terry

Date Created: 02/06/2016 09:56

Date Updated: 02/06/2016 09:56

Status: Pending Approval

Est. Client Total Before Extension: £5,890.50

Est. Client Total After Extension: £6,577.73

Start Date: 30/06/2016

End Date: 07/07/2016

Comments: Placement extended due to staff illness.

Further information about the extension, included who requested it and the estimated client total if the extension was to be approved

- Once you have reviewed the information, return to the Placement summary page and select either **Approve** or **Reject**.

Extensions Export					
Start Date	End Date	Status	Comments	Approve	Reject
30/06/2016	07/07/2016	Pending Approval	Placement extended due to staff illness.	Approve	Reject

2. Select either 'Approve' or 'Reject'

A. If you choose to **Reject**, you will need to select a reason and type a comment:

Please Write A Text Comment And Choose A Reason For Rejecting This Extension. Once This Has Been Done Click Reject To Reject This Extension.

Reason: *

Comments: *

Cancel **Reject**

3. Select a reason for the rejection and enter some comments

4. Click 'Reject' to finish

B. If you choose to **Approve**, you will need to type a comment:

Please Write A Text Comment And Click Approve To Approve This Extension.

Comments: *

Cancel **Approve**

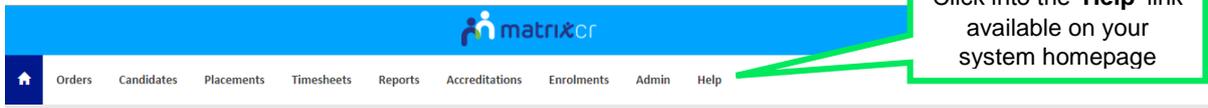
3. Enter some comments

4. Click 'Approve' to finish

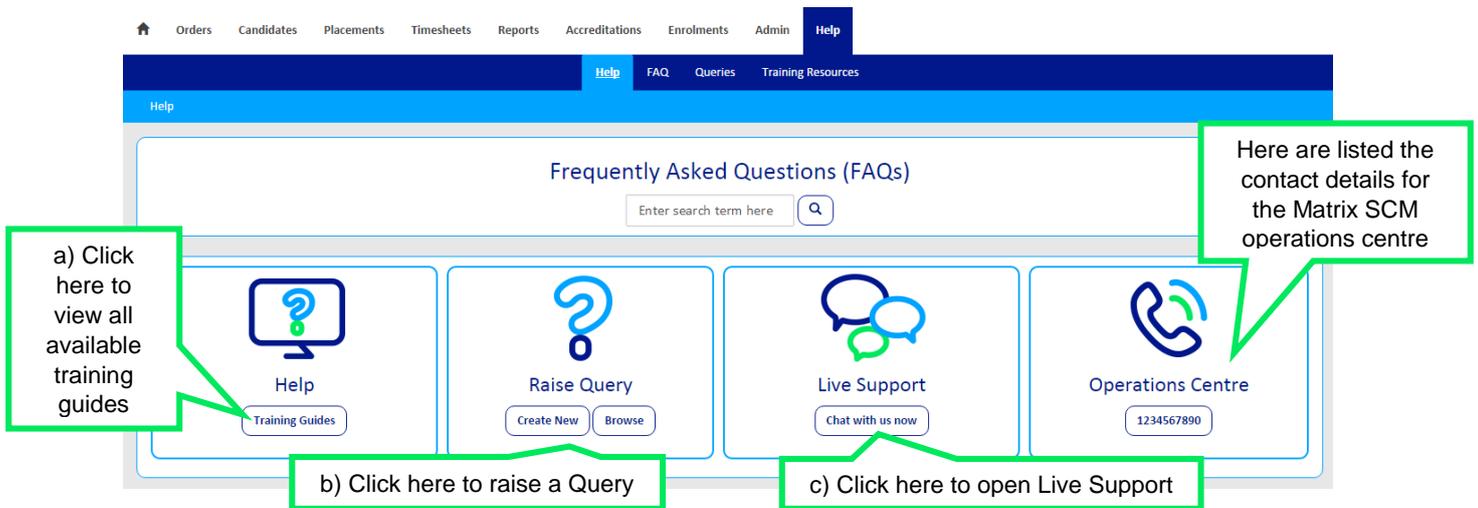
The end date will be updated on the Placement summary page.

Need More Support?

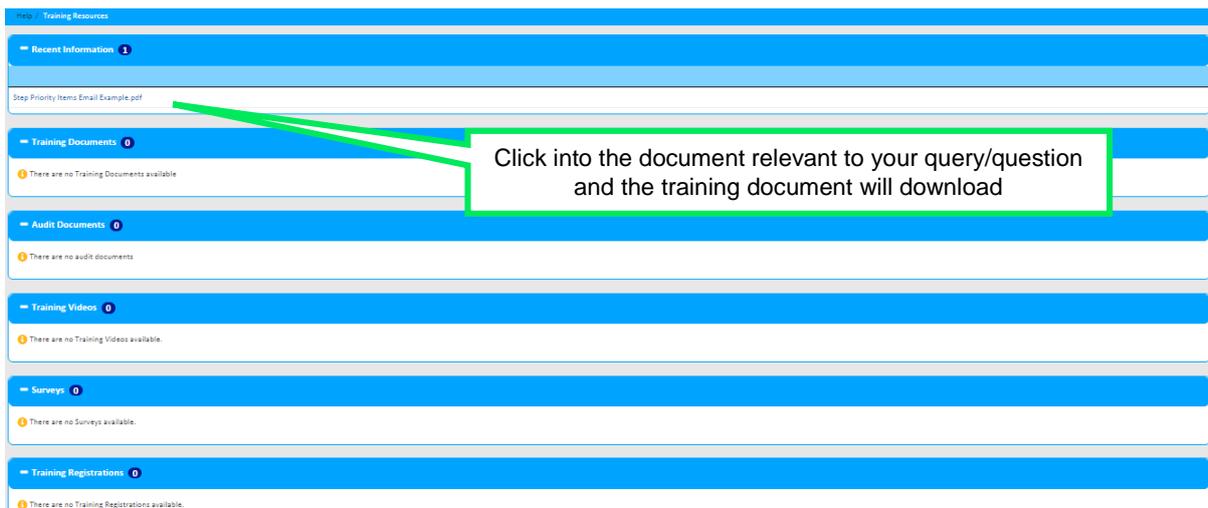
If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:



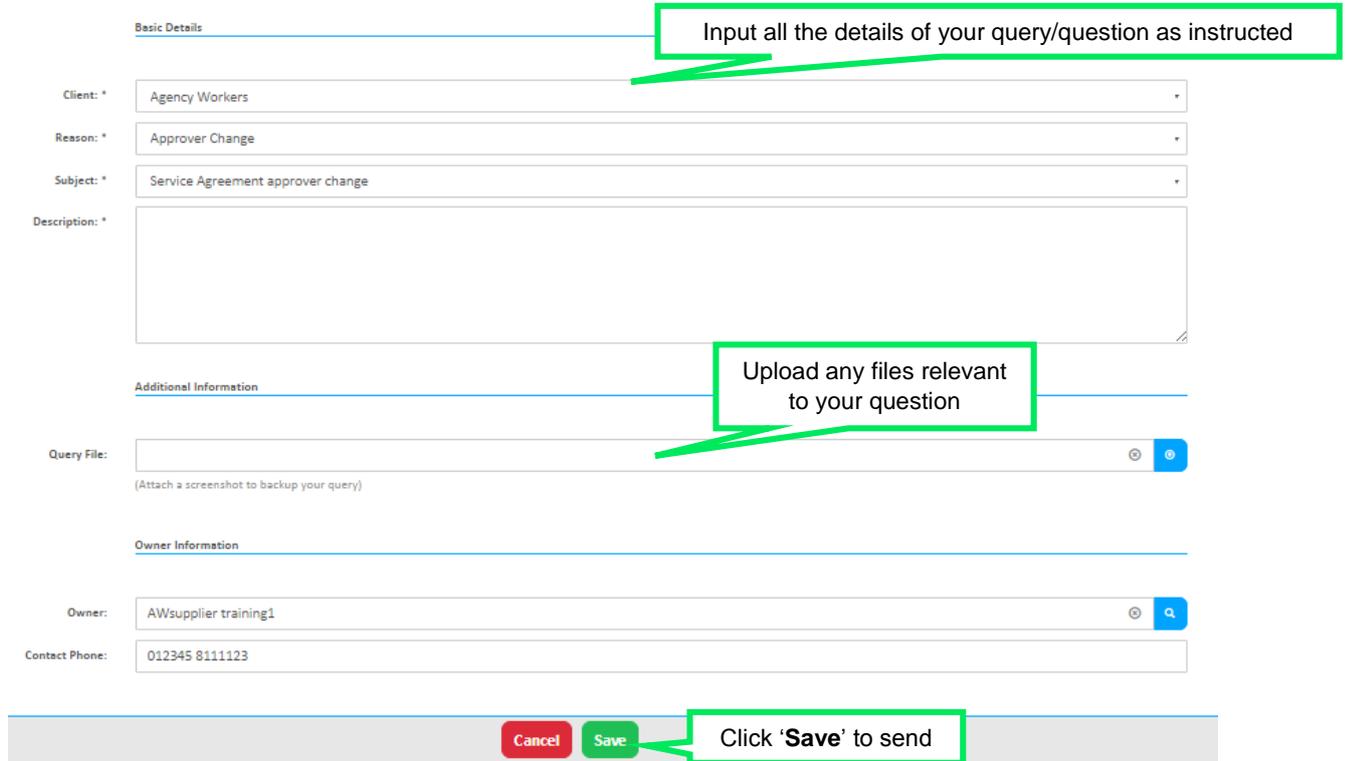
You will be taken to the help and support section where you have a number of different ways of finding the answer to any questions you may have:



a) Training Guides / Documents / Videos are available for you to view and use as support:



b) Queries can be raised to the Matrix SCM Account Management team:



The screenshot shows a web form for raising a query. It is divided into three sections: 'Basic Details', 'Additional Information', and 'Owner Information'. The 'Basic Details' section includes dropdown menus for 'Client' (Agency Workers), 'Reason' (Approver Change), and 'Subject' (Service Agreement approver change), and a large text area for 'Description'. The 'Additional Information' section has a 'Query File' field with a note '(Attach a screenshot to backup your query)'. The 'Owner Information' section includes 'Owner' (AWsupplier training1) and 'Contact Phone' (012345 8111123). At the bottom, there are 'Cancel' and 'Save' buttons. Three green callout boxes with arrows point to the 'Description' field, the 'Query File' field, and the 'Save' button, containing the following text: 'Input all the details of your query/question as instructed', 'Upload any files relevant to your question', and 'Click 'Save' to send' respectively.

Basic Details

Client: * Agency Workers

Reason: * Approver Change

Subject: * Service Agreement approver change

Description: *

Additional Information

Query File: (Attach a screenshot to backup your query)

Owner Information

Owner: AWsupplier training1

Contact Phone: 012345 8111123

Cancel Save

A member of the Matrix SCM Account Management team will be assigned to your Query and they will respond to you with an answer.

Each individual Query has its own unique reference number which will detail the question and the response.

You can look through all the Queries you have raised and any that have been raised by members of your team by clicking into the 'Browse' link under the Queries section of the help and support section.

- c) Live Support is an instant chat help function where you will be conversing with a member of the Matrix SCM Account Management team in real-time:



Welcome to Online Support! Please outline your query in detail (providing order/placement/timesheet numbers) and if you are a client or supplier.

Fields marked with * are required

Please select the department you would like to reach:

Support for CR.net Online!
 Support for SProc.Net Offline [Send a Message](#)

Your Name: *

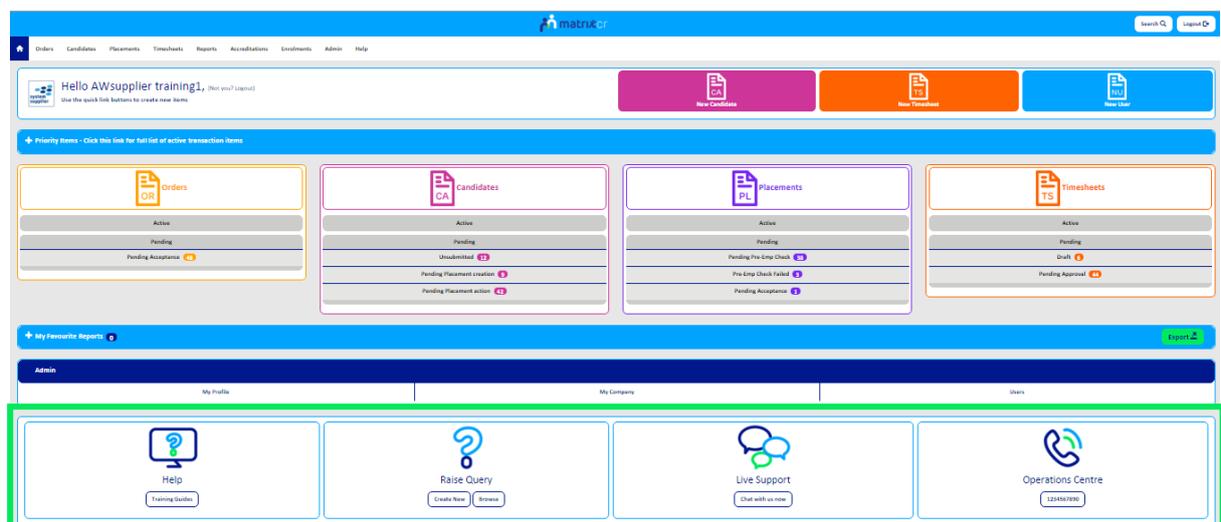
Your Company: *

Your Question (please include any order/placement/timesheet numbers and the issue): *

Input your details and the details about your question as instructed

Click 'Start Chat' to bring up the instant chat

All the system help and support option are also available on your system homepage:



The screenshot shows the Matrix SCM system homepage. At the top, there is a navigation bar with links for Orders, Candidates, Placements, Timesheets, Reports, Accreditations, Enrolments, Admin, and Help. Below this, there is a header area with a user profile and search options. The main content area is divided into several sections: a 'Priority Items' section, a 'My Favourite Reports' section, and a 'Support' section. The 'Support' section is highlighted with a green border and contains four tiles: 'Help' (with a 'Training Guide' button), 'Raise Query' (with 'Create New' and 'Browse' buttons), 'Live Support' (with a 'Chat with us now' button), and 'Operations Centre' (with a '1214507890' button).