Placement and Timesheet Management

Client Guide - Agency Workers

v3.1

Contents

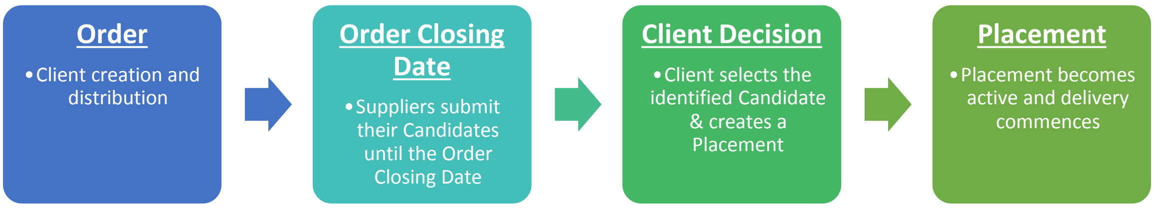
Overview

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:

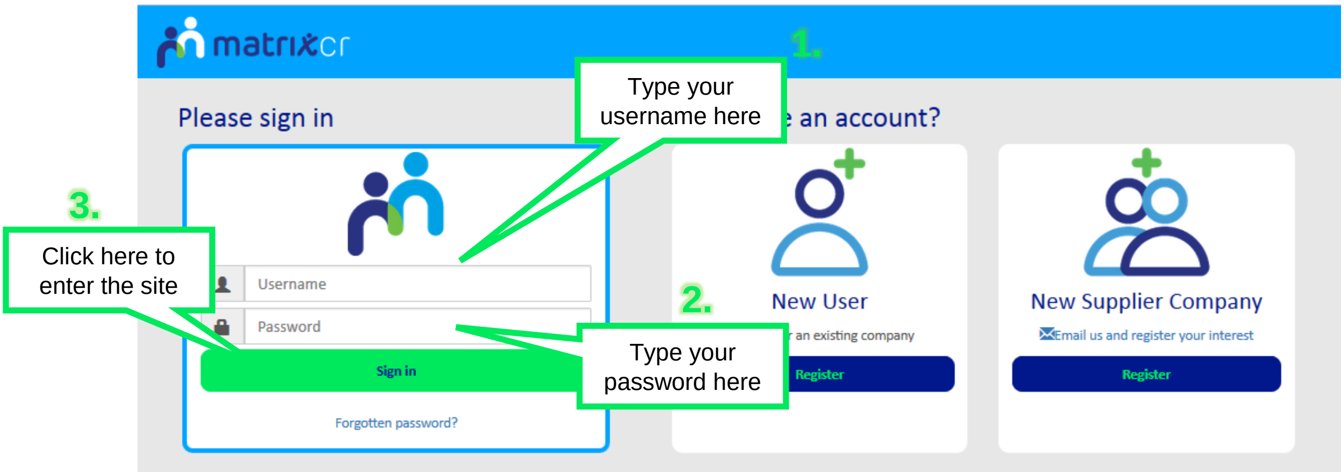
- ➔ How to create a new Placement
- ➔ Placement messaging
- ➔ Pre-employment Checks

Glossary

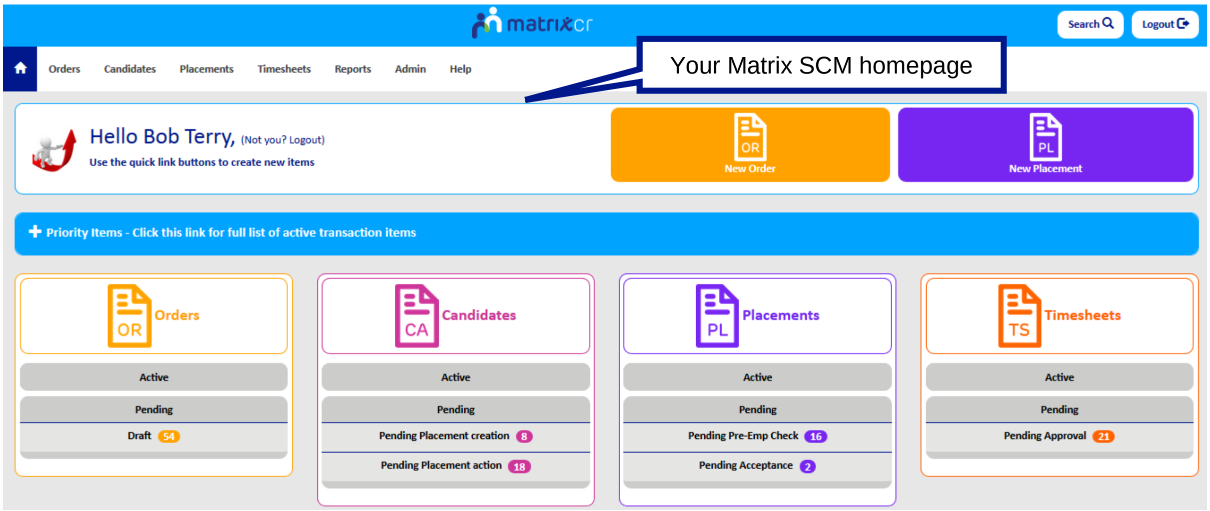
Terminology	Description
Order	A client request for a service needed, containing service details
Candidate	Supplier's offer submission against a client's Order criteria
Category	Type of service, e.g. Training Services, Agency Workers
Job Title	Service title and summary of any standard service details 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:

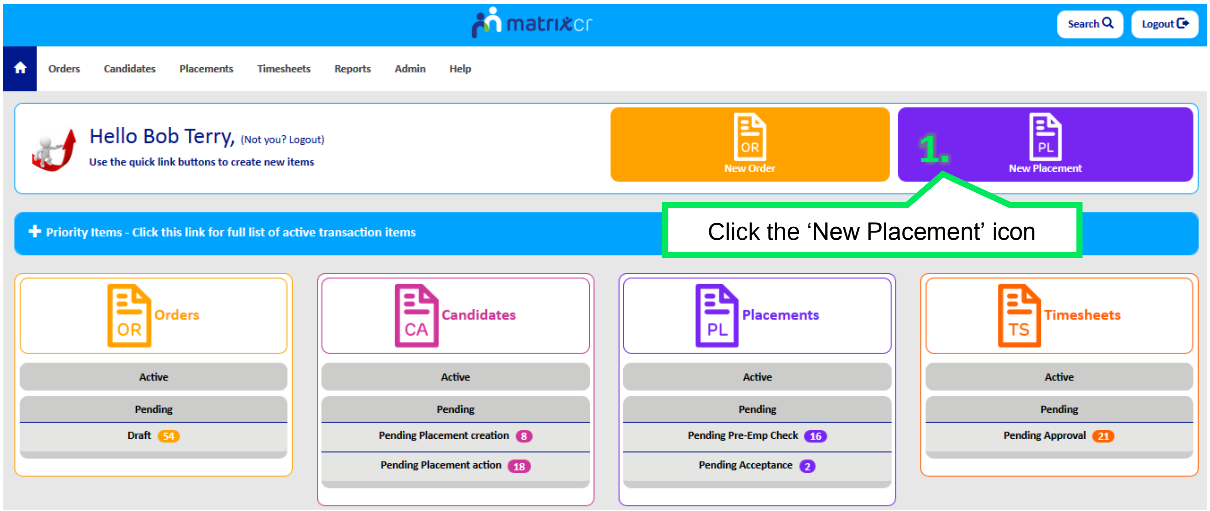


2. You will be taken directly to your Matrix-CR.Net homepage:

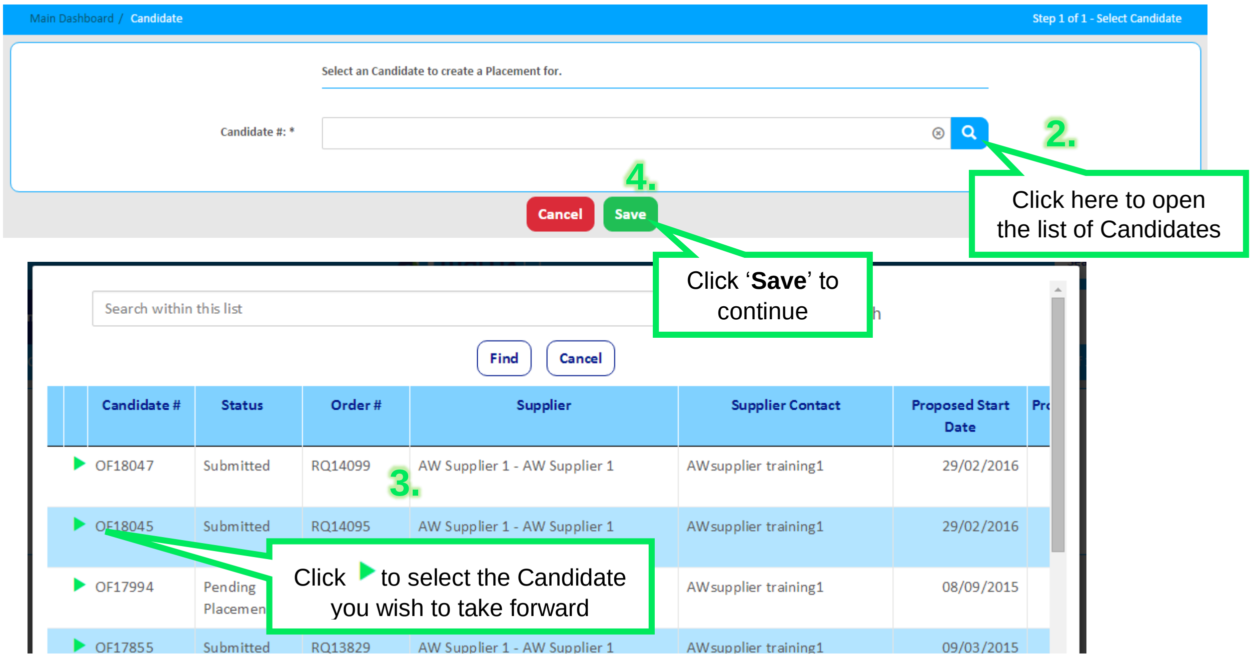


Creating a Placement

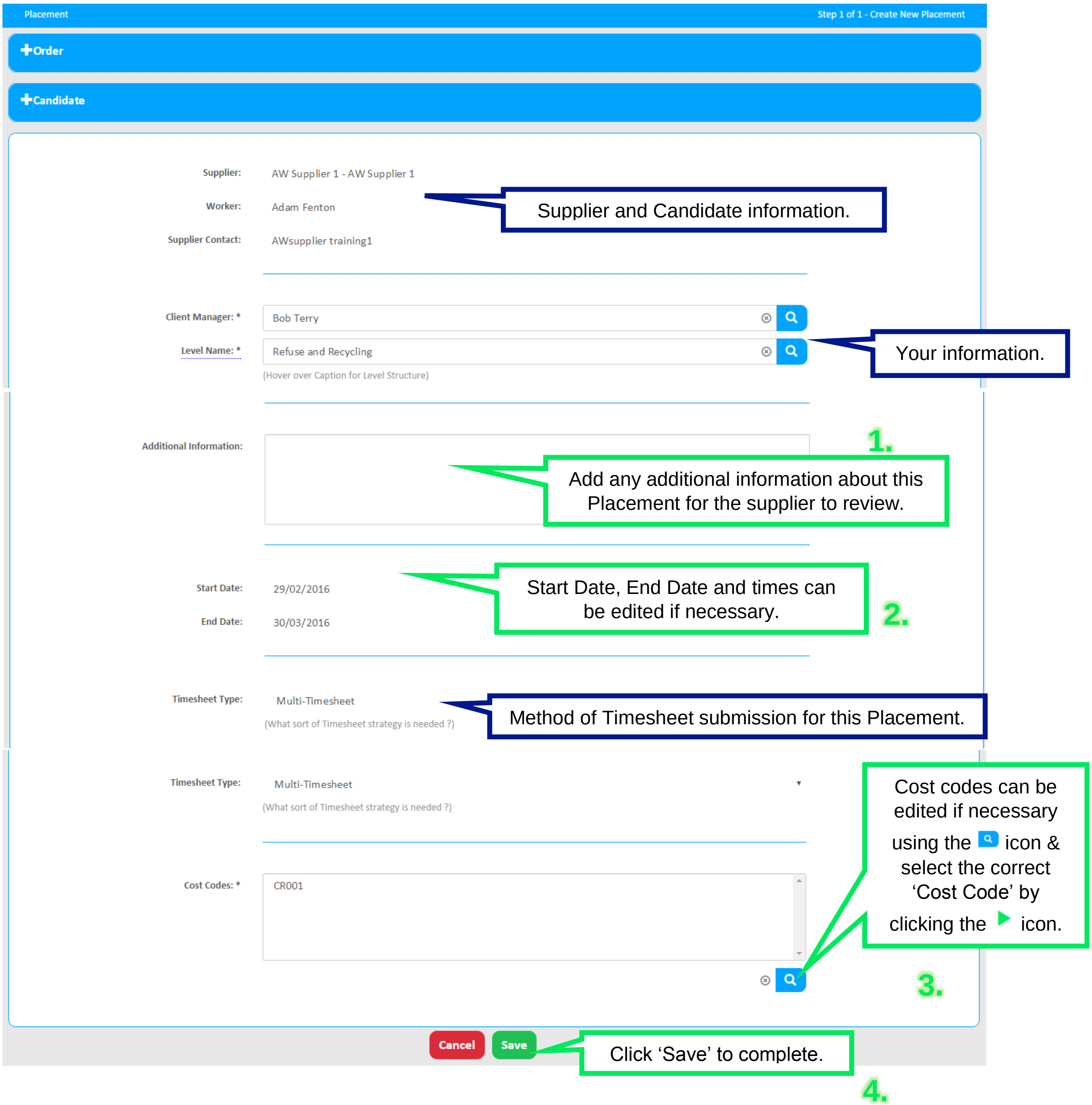
1. On your homepage click into the '**New Placement**' icon



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

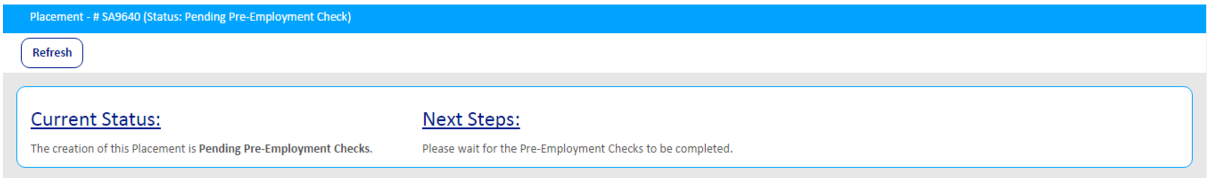


3. Review the information which has been transferred into your Placement from the Order and Candidate objects and add additional information if necessary:

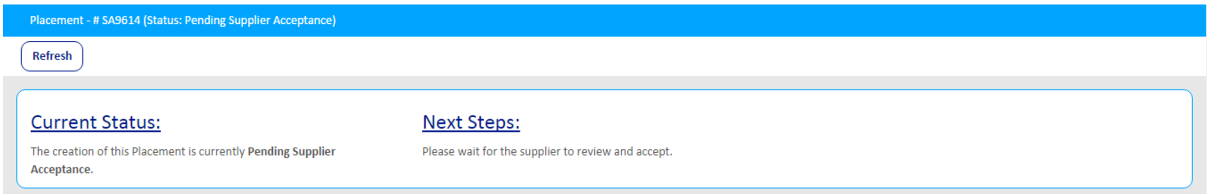


Pre-Employment Checks

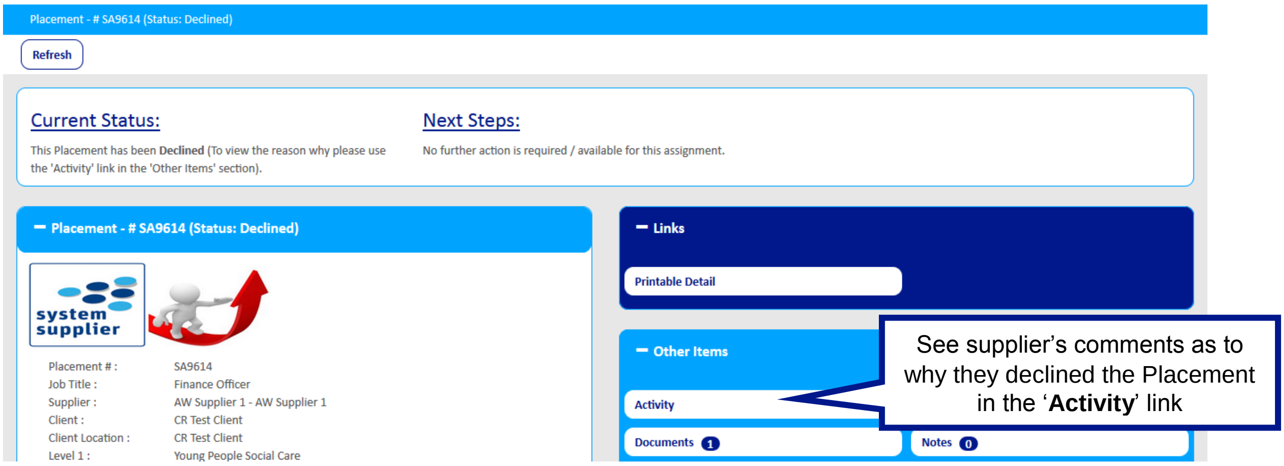
1. Once created the Placement will be sent to Matrix SCM for all Candidate documents to be checked/reviewed prior to the Placement being sent to the supplier for acceptance:



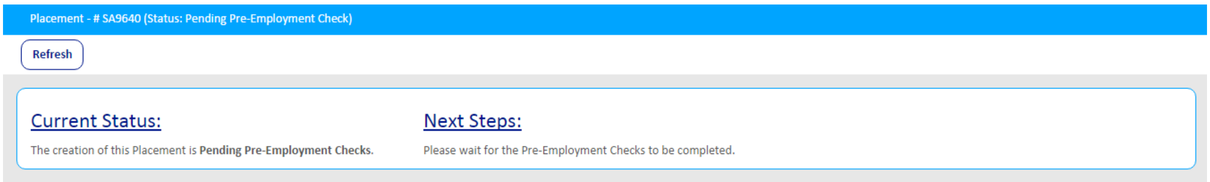
2. Once the Pre-Employment check have been completed:
    a. If all document are correct the Placement will be sent to the supplier for them to review and either:
        i. Accept – The placement will become active and service delivery can commence.



        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.



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

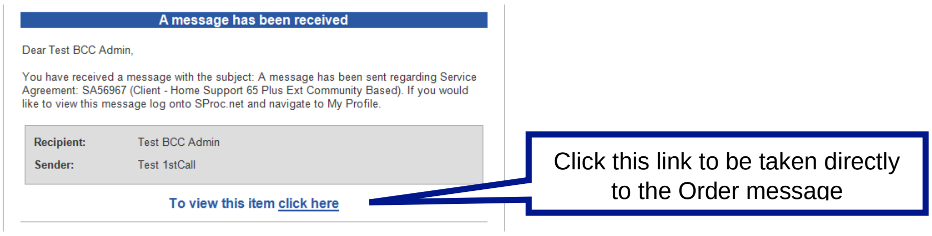


Note: If a supplier fails to upload the correct documents the Placement will be suspended and Matrix SCM will contact you to discuss creating a new placement with your next appropriate Candidate.

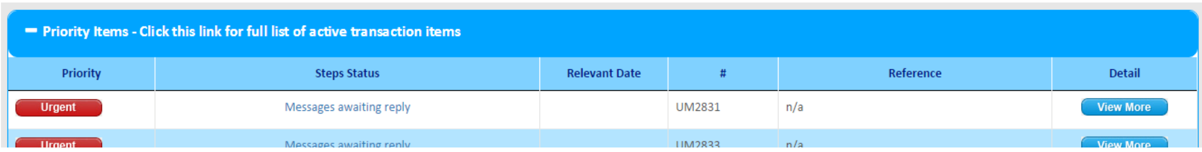
Placement Messaging

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

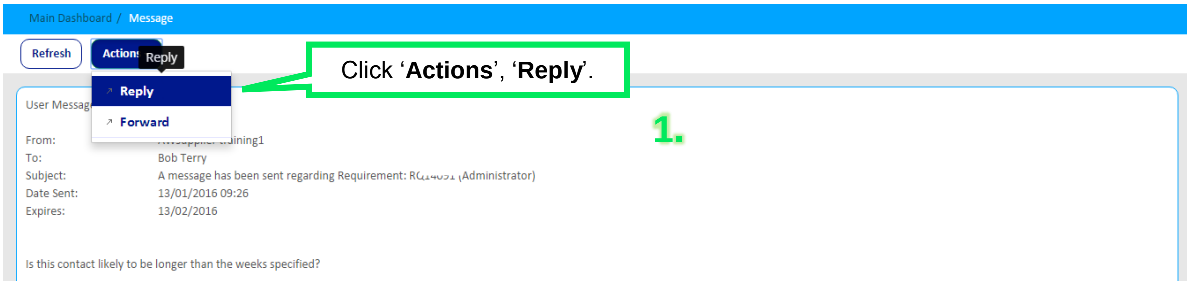
1. If a supplier sends you a message you will receive an email notification:



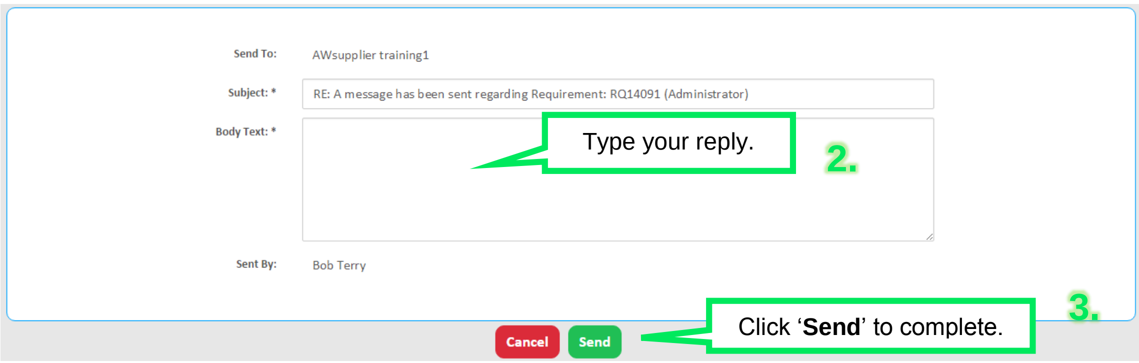
The message will also display on your ‘Priority Items’ list:



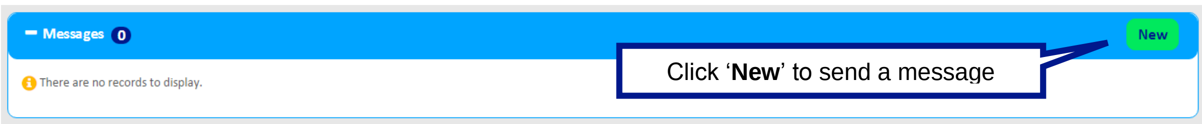
2. To reply, click ‘View More’ from your priority items list or ‘click here’ on your notification email. You will be taken to the message:



3. Draft a response:



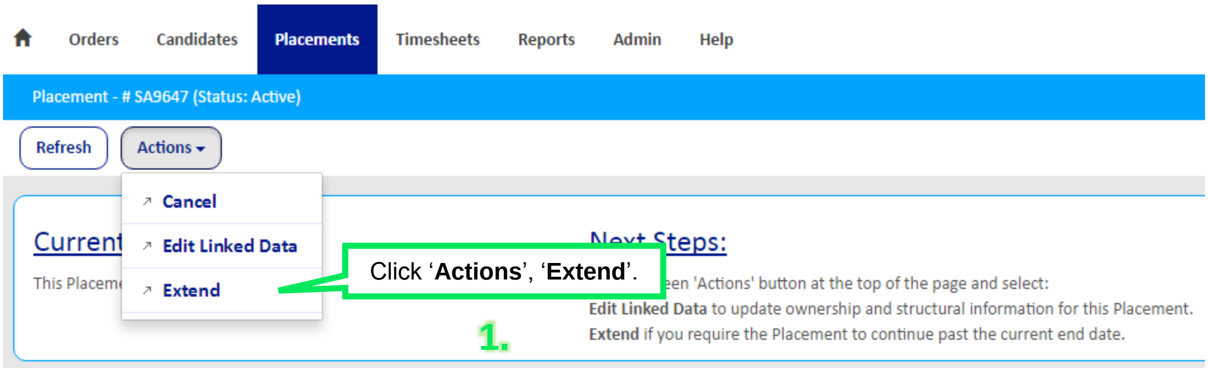
Note: You can also send the supplier a message using the messages field on the Placement summary page



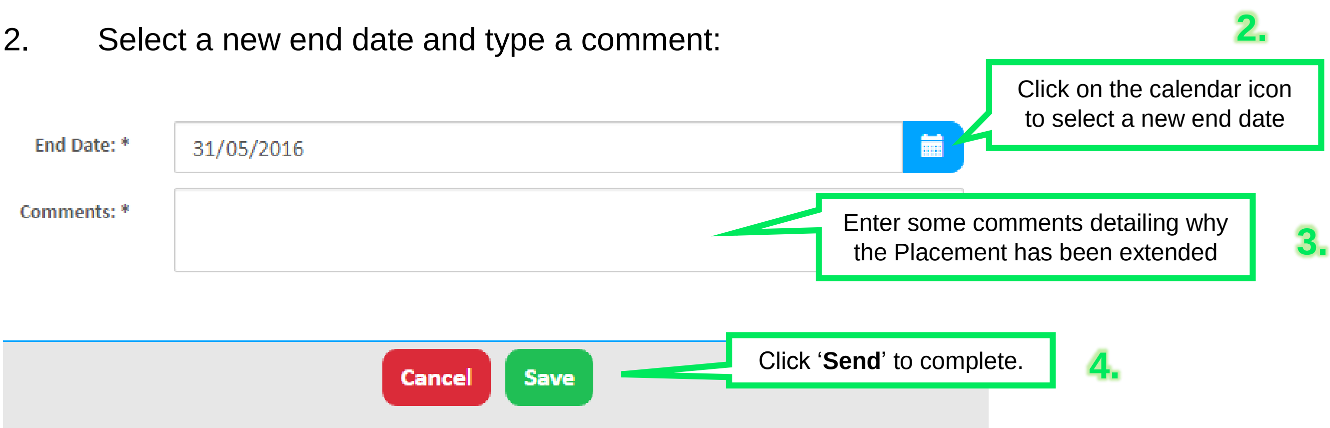
Placement Extensions

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

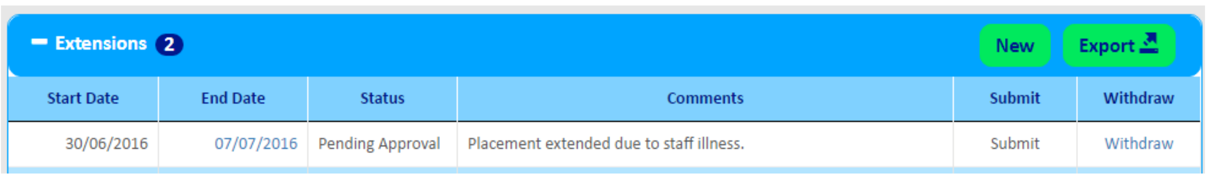
1. From the Placement summary page, click on the 'Actions' button and select 'Extend'



2. Select a new end date and type a comment:



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



Extensions 2 | New | Export

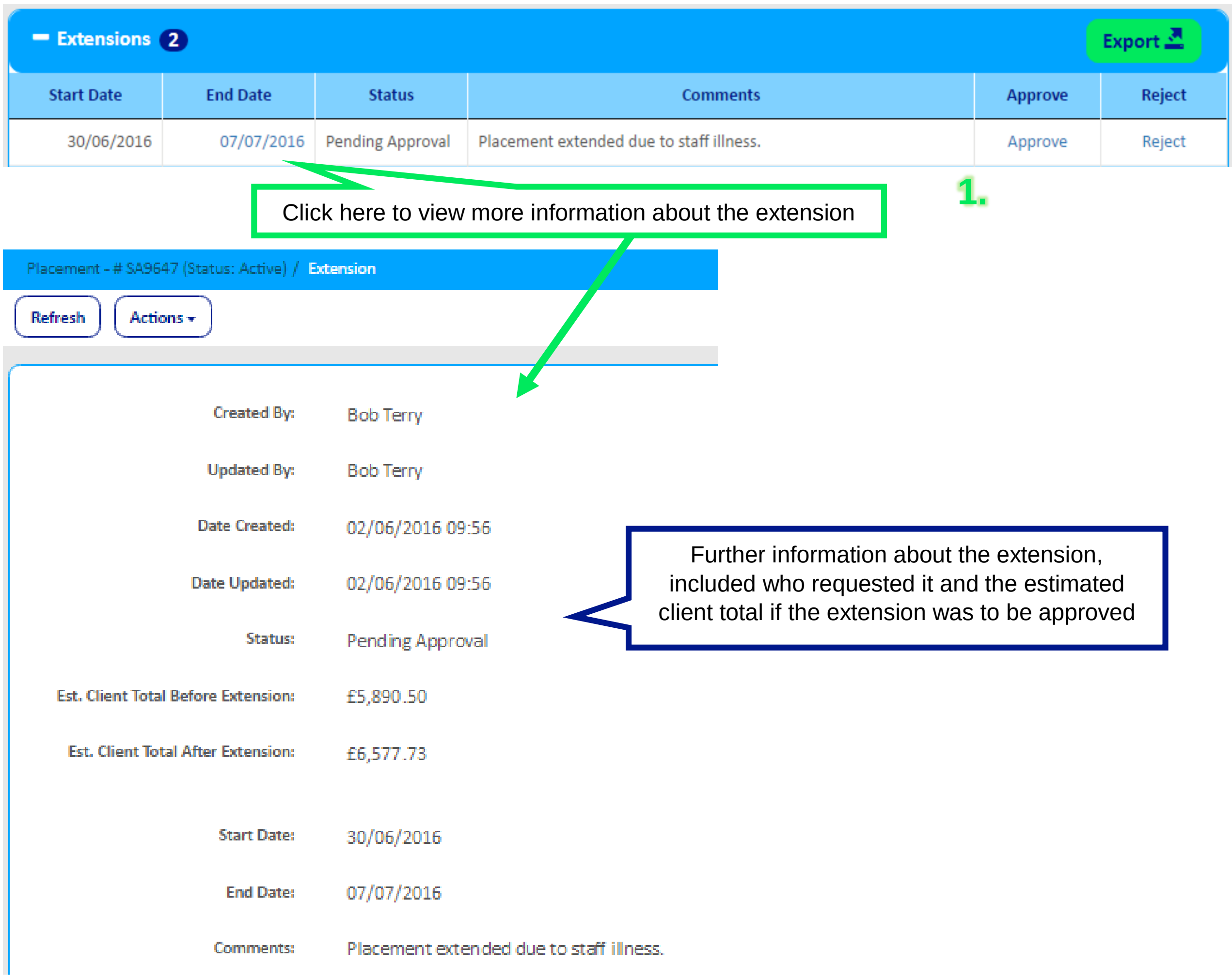
Start Date	End Date	Status	Comments	Submit	Withdraw
30/06/2016	07/07/2016	Pending Approval	Placement extended due to staff illness.	Submit	Withdraw

Placement Extension Approval

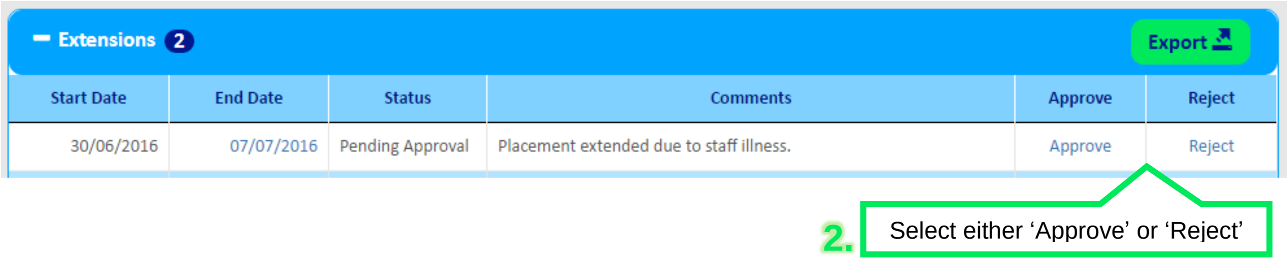
The Placement extension may require approval from a manager. Click on **Extension Approvers** to view who the names of these approvers.

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:



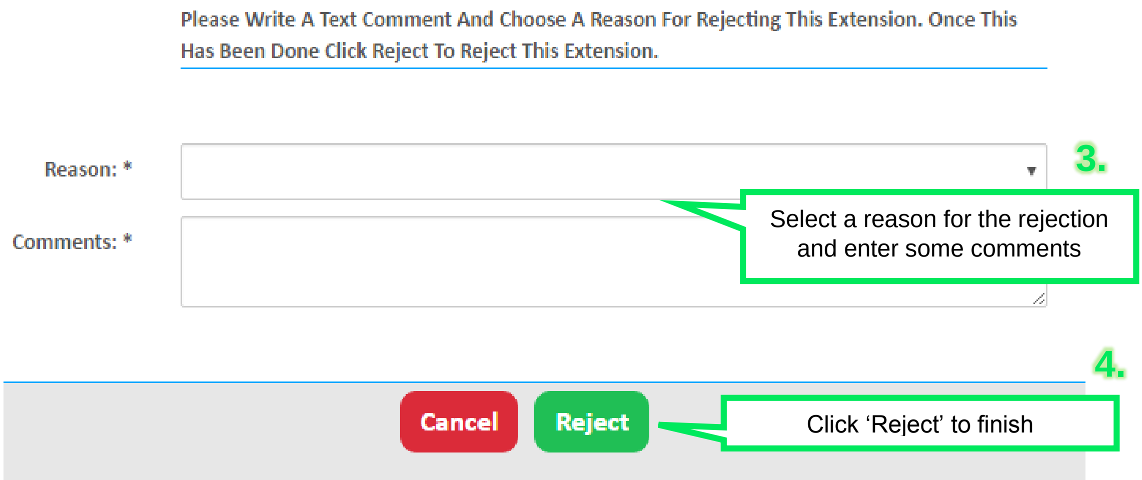
2. Once you have reviewed the information, return to the Placement summary page and select either **Approve** or **Reject**.



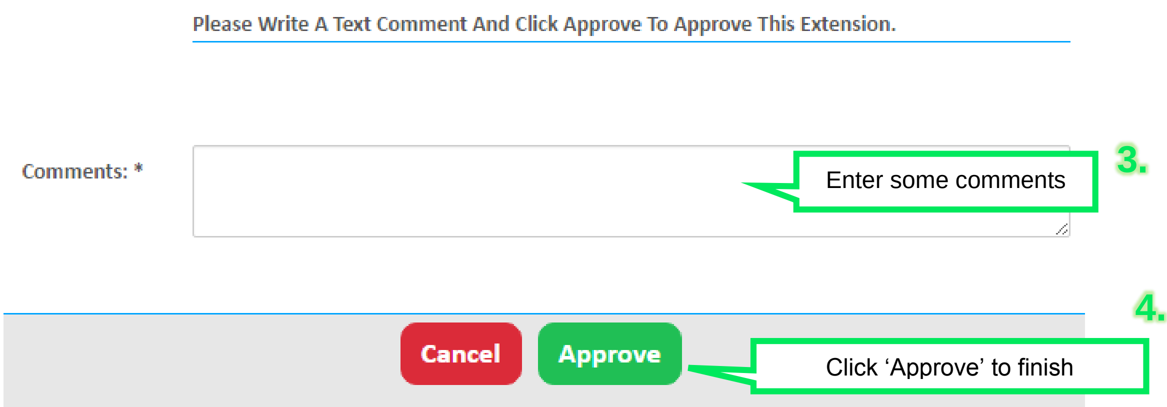
Extensions 2 | Export

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

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



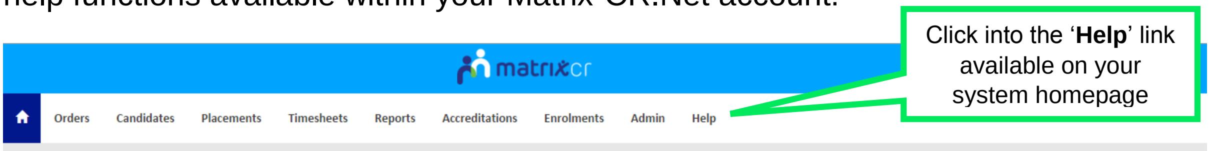
B. If you choose to **Approve**, you will need to type a comment:



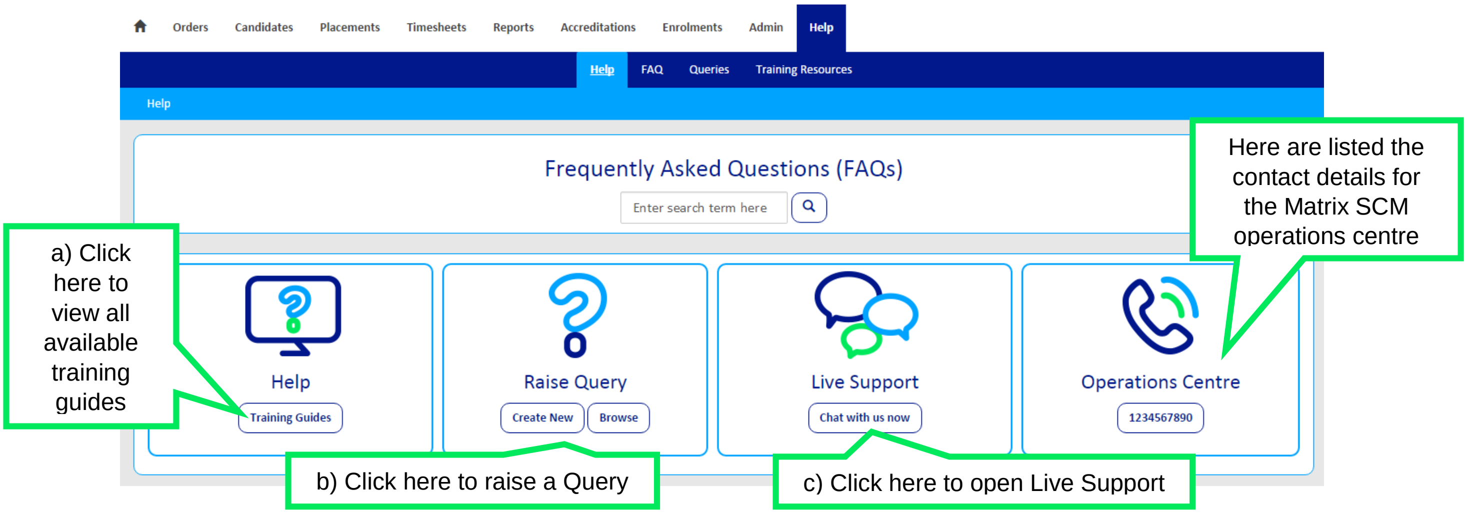
The end date will be updated on the Placement summary page.

Need More Support?

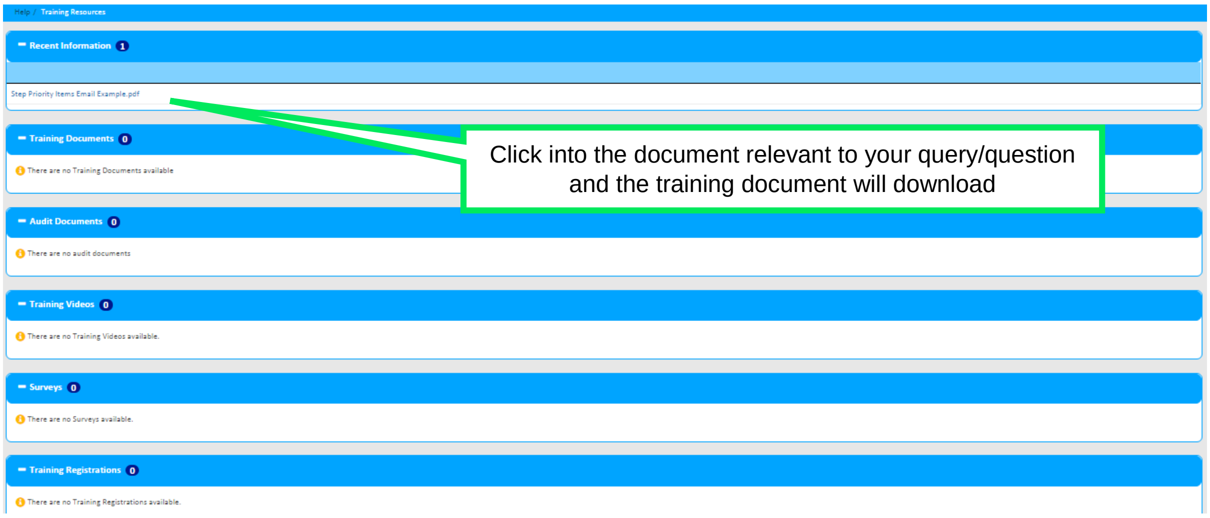
If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:



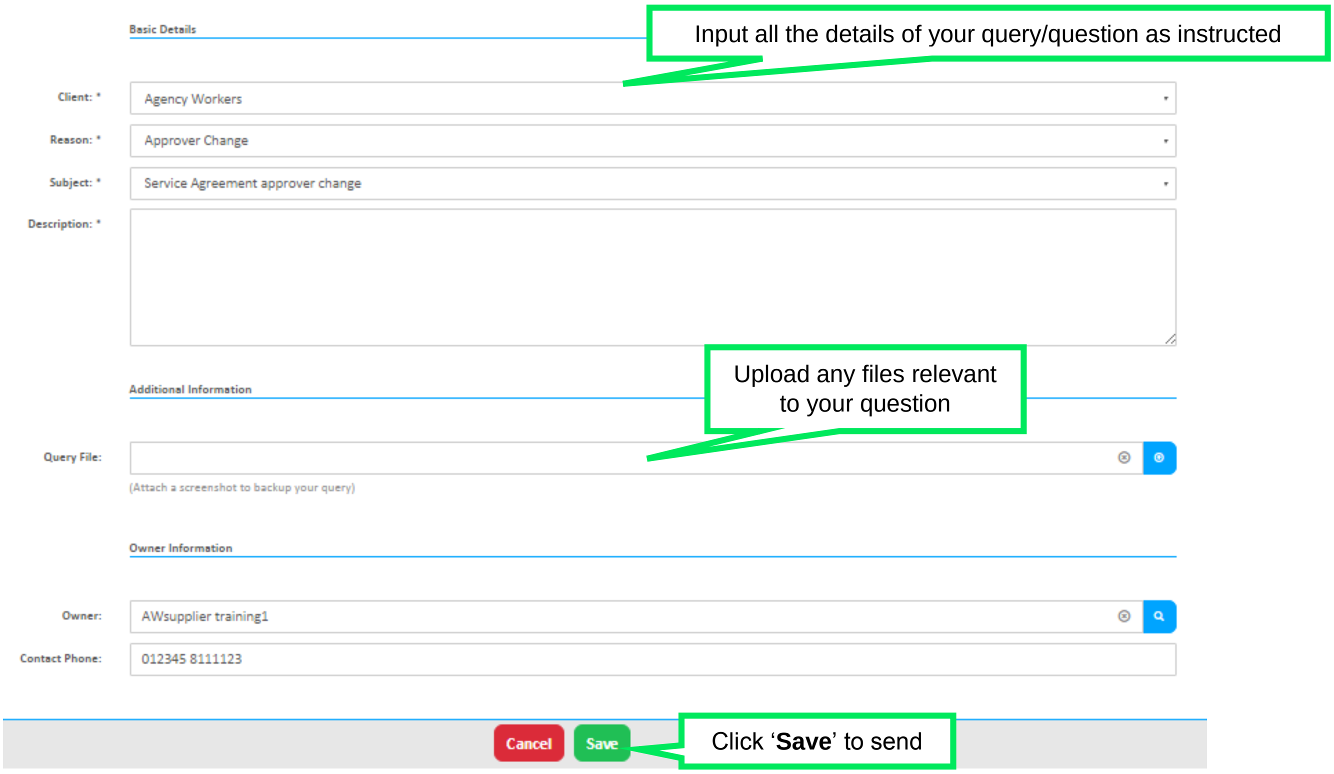
You will be taken to the help and support section where you have a number of different ways of finding the answer to any questions you may have:



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:

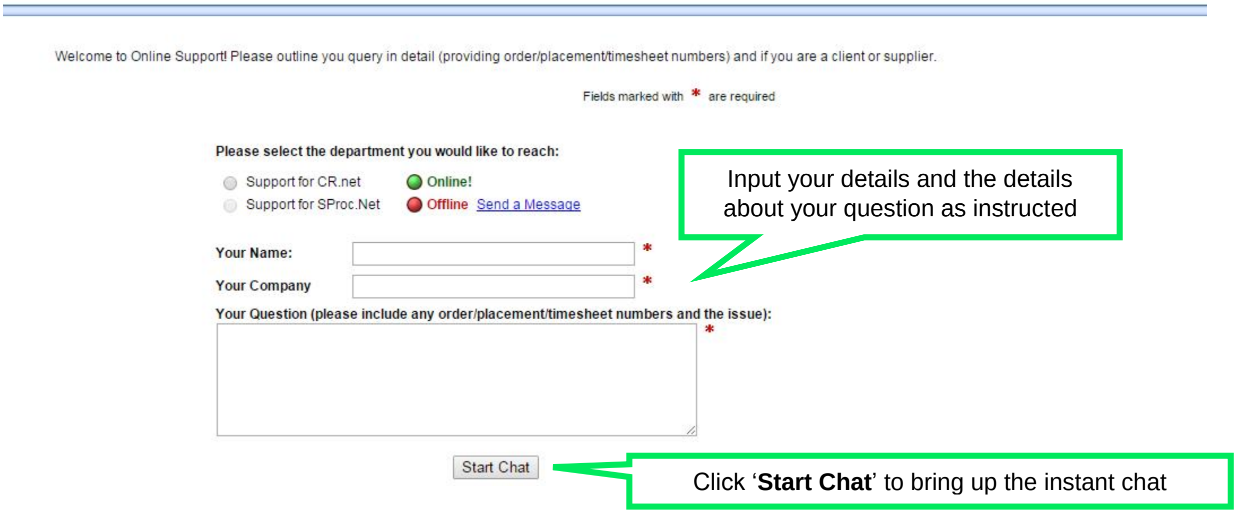


A member of the Matrix SCM Account Management team will be assigned to your Query and they will respond to you with an answer.

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:



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