



Creating a Placement & Pre-Employment Checks

Client Guide
Vol. 7

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Creating a Placement

1. Ensure that from the last step of choosing Accept – that you Click Accept – Progress to New Placement is highlighted and click the accept button.

Candidate

Candidate

Accept the suppliers Candidate so a Placement can be created.

Comments

Accept - Progress To New Placement
 Accept - Return To Candidate

Go Back < **Accept**

2. Placement information will pull through from the Order when the Candidate has been accepted through.

Order

Candidate

Supplier
Great Recruiters Ltd - Test

Worker
Candidate Sa

Supplier Contact *
Training Consultants

Personnel Enrolled
Ongoing

Contract Type
Umbrella PAYE

Worker Company
test

IR35 Status
Inside IR35

Comments

Client Manager *
James Nables

Level Name *
Environmental Services

Additional Information

Start Date *
11/12/2023

End Date *
29/12/2023

Start Time *
09 : 00

End Time *
17 : 30

Timesheet Type
Multi Timesheets




What sort of Timesheet strategy is needed?

Cost Codes *
0920-0200
0920-0200



Click Here to add Cost Codes to the list.

Cancel **Save**



3. If you wish to amend any of these details, click the  icon to search the available options on CR.Net and select via the  icon. Once you are happy with the Placement details, click .
4. You will then see that the creation of this placement is **Pending Pre – Employment Checks**

Placement - # SA393348 (Status: Pending Pre-Employment Check)

 REFRESH  ACTIONS ▾

Current Status:

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

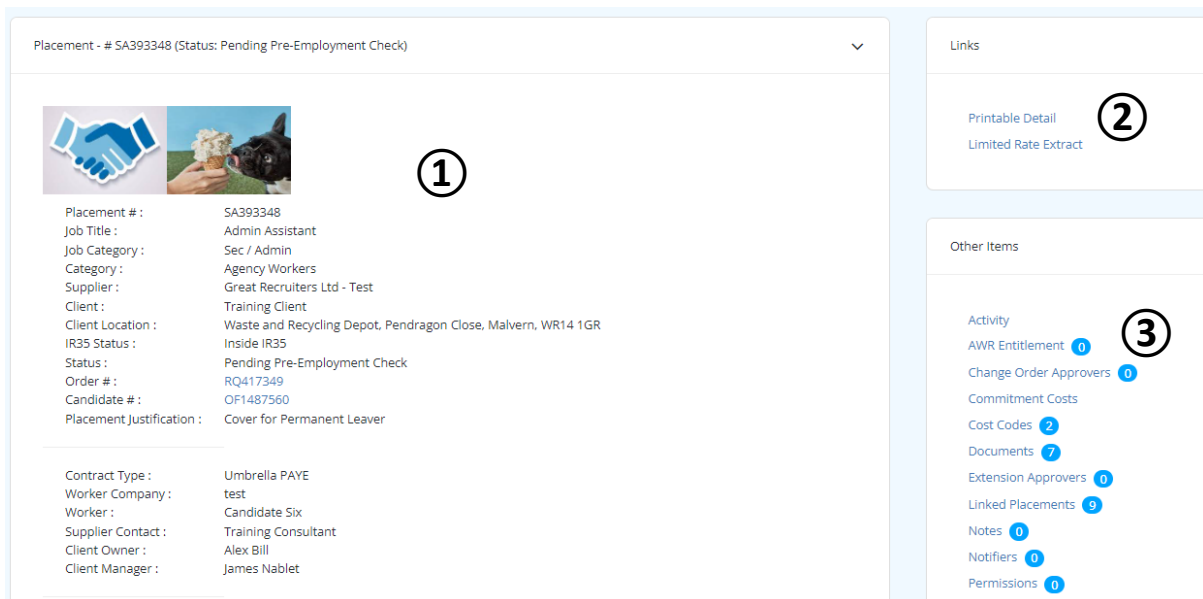
Next Steps:

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

5. This will now sit with the Customer Success Executive to check all compliance and liaise directly with the supplier to ensure this is completed in a timely manner.

Pre-Employment Compliance Checks

For new Placements with a start date in the future, Matrix will complete a Pre-Employment Compliance Check (PEC) of all the Candidate's documents to ensure they are fully compliant. Below is a Screenshot of an individual Placement page.



Placement - # SA393348 (Status: Pending Pre-Employment Check)

1

Placement # : SA393348
 Job Title : Admin Assistant
 Job Category : Sec / Admin
 Category : Agency Workers
 Supplier : Great Recruiters Ltd - Test
 Client : Training Client
 Client Location : Waste and Recycling Depot, Pendragon Close, Malvern, WR14 1GR
 IR35 Status : Inside IR35
 Status : Pending Pre-Employment Check
 Order # : RQ417349
 Candidate # : OF1487560
 Placement Justification : Cover for Permanent Leaver

Contract Type : Umbrella PAYE
 Worker Company : test
 Worker : Candidate Six
 Supplier Contact : Training Consultant
 Client Owner : Alex Bill
 Client Manager : James Nablet

Links

Printable Detail **2**
 Limited Rate Extract

Other Items

Activity **3**
 AWR Entitlement **0**
 Change Order Approvers **0**
 Commitment Costs
 Cost Codes **2**
 Documents **7**
 Extension Approvers **0**
 Linked Placements **9**
 Notes **0**
 Notifiers **0**
 Permissions **0**

1. Placement Status

- a. **Pending Pre-Employment Checks** – These are with Matrix to review the documents on the Placement to ensure the Candidate is fully compliant before commencing their post.
- b. **Failed Pre-Employment Checks** – The Placement is not compliant to commence their post. The agency is notified regarding what documents need to be corrected and uploaded.
- c. **Active** – Placement is in Active Status and fully compliant. Agency worker can commence their post.
- d. **Pending Audit** – Compliance Documents are up for annual review by Matrix to ensure worker is still compliant in their post.
- e. **Failed Audit** – Compliance Documents have failed annual review. The agency is notified regarding what documents need to be corrected and uploaded.
- f. **Ended** – Placement has reached its specified end date.
- g. **Cancelled** – Placement has been cancelled – Agency worker never started their post.



2. Basic Placement summary information

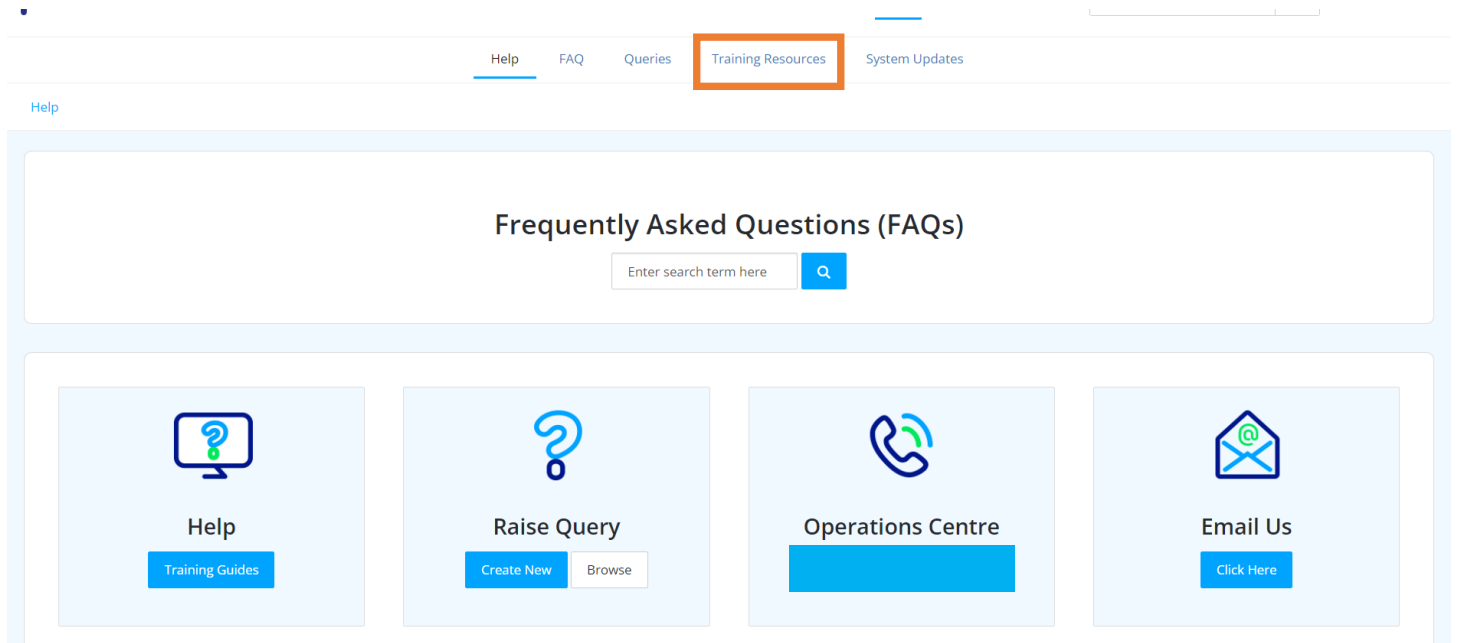
3. Other Items - Sub Sections within the Order. Click through to see each stated section.

You will receive email notifications each time a Placement Status changes or if they are approaching their specified End Date on their Placement. Agencies have 24 hours to correct the failed compliance documents and re-submit for review.



Need more support?

You can contact your Matrix Customer Success Executive or another member of the Customer Success Team for assistance with Matrix-CR.net through the following options:



The screenshot shows a navigation menu with the following items: Help, FAQ, Queries, Training Resources (highlighted with an orange box), and System Updates. Below the menu is a 'Help' section titled 'Frequently Asked Questions (FAQs)' with a search bar containing the text 'Enter search term here' and a magnifying glass icon. Below the search bar are four service tiles: 'Help' with a 'Training Guides' button, 'Raise Query' with 'Create New' and 'Browse' buttons, 'Operations Centre' with a large blue button, and 'Email Us' with a 'Click Here' button.

Underneath your help tab you also have access to help guides and videos under 'Training Resources' as highlighted above.

The number for the Customer Success Team will be displayed on the live site.

