



Placement Extensions & Extension Approval

Client Guide
Vol. 8


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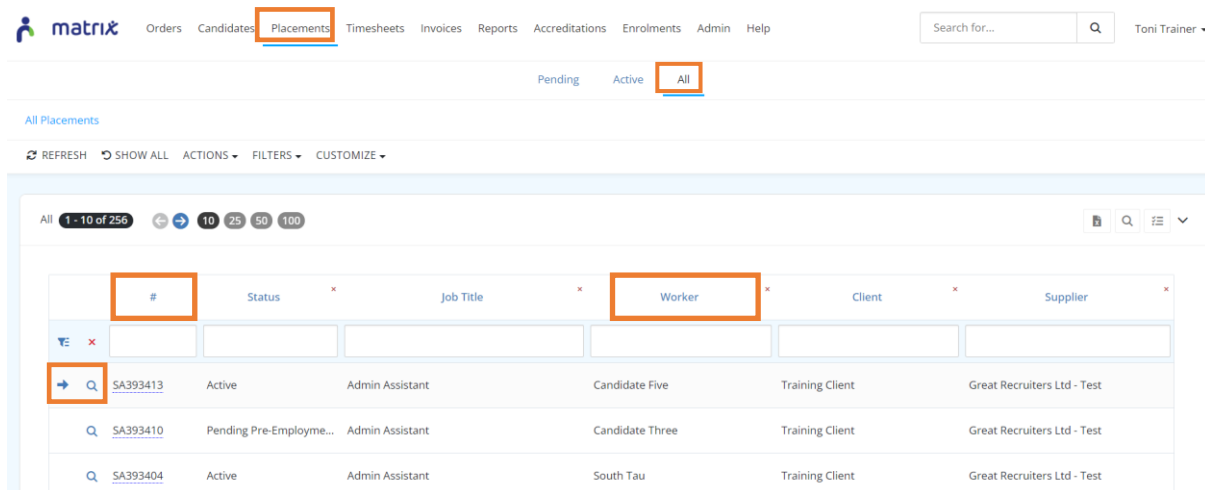
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Extending a Placement

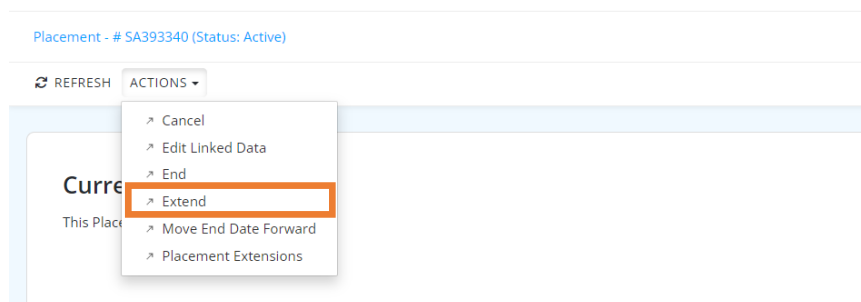
As a placement approaches the listed end date, you will receive an email notification prior to this date with a prompt to extend if required. This notification is usually sent two weeks before the end date.

1. To extend the Placement end date, navigate to the Placement summary page, by navigating to the Placements tab on your home screen and search for the placement either by worker name or the placement number as highlighted below.
2. Once you have located the placement click into the  which will bring you to the placement details.



#	Status	Job Title	Worker	Client	Supplier
SA393413	Active	Admin Assistant	Candidate Five	Training Client	Great Recruiters Ltd - Test
SA393410	Pending Pre-Employe...	Admin Assistant	Candidate Three	Training Client	Great Recruiters Ltd - Test
SA393404	Active	Admin Assistant	South Tau	Training Client	Great Recruiters Ltd - Test

3. Click **ACTIONS** ▾ and select 'Extend'.



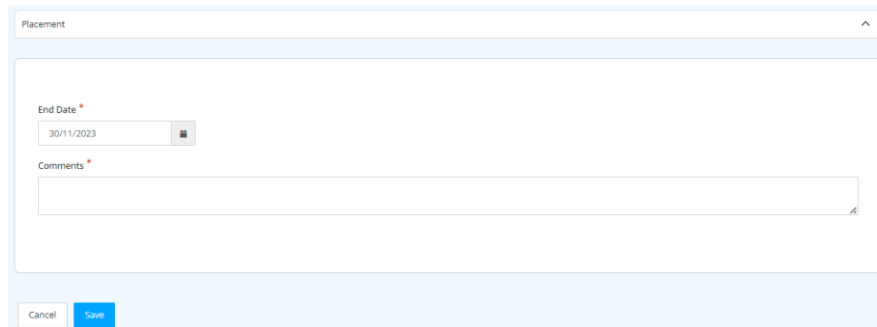
Placement - # SA393340 (Status: Active)

REFRESH ACTIONS ▾

- Cancel
- Edit Linked Data
- End
- Extend**
- Move End Date Forward
- Placement Extensions



4. Submit the new end date that you would like to extend the Placement to and supporting comments and click **Save** to submit the extension request to the relevant approver.



The screenshot shows a web form titled "Placement" with a dropdown arrow. The form contains two main sections: "End Date" and "Comments". The "End Date" section has a date input field with the value "30/11/2023" and a calendar icon. The "Comments" section has a large text area. At the bottom of the form, there are two buttons: "Cancel" and "Save".

Placement Extension Approval

If your Matrix-CR.Net system is set up with Placement Extension approval, your Extension request will have been sent to your client assigned approver to action. If this is the case, your Extension will be submitted into 'Pending Approval' status.

1. On the Placement summary page, scroll down to the Extensions section to view all submitted Extensions and their status.

Start Date	End Date	Status	Est. Client Total Before Extension	Est. Client Total After Extension	Comments	Submit	Withdraw	Approve	Reject
29/12/2023	06/01/2024	Pending Approval	£4,750.00	£6,861.11	test	Submit	Withdraw	Approve	Reject

2. The relevant extension approver will have the option to 'Approve' or 'Reject' as shown above. Once they select either option, they will be required to enter in supporting comments and must click [Approve](#) or [Reject](#) when they have entered in their comments to update the Placement Extension status.
3. You can also see the extension approvers against each Placement under the 'Extension Approvers' sub section under 'Other Items' on the Placement page.

Other Items	
Activity	
AWR Entitlement	0
Change Order Approvers	0
Commitment Costs	
Cost Codes	1
Documents	7
Extension Approvers	2
Linked Placements	9

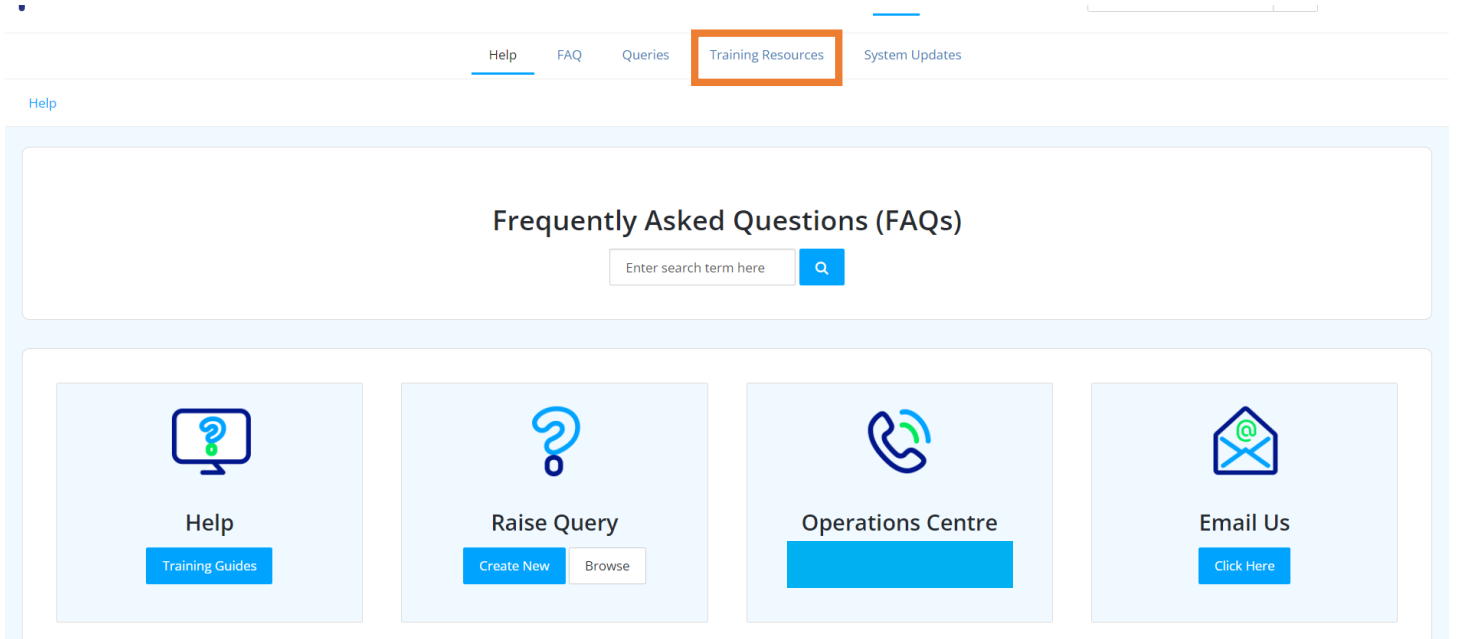


You will receive email notifications each time an extension is raised if you are listed as an extension approver against a Placement. You can follow the link in the email you receive or the link under your Priority Items.



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 with the heading 'Frequently Asked Questions (FAQs)' and a search bar containing the text 'Enter search term here'. Below the search bar are four main support options, each with an icon and a button:

- Help**: Icon of a question mark in a speech bubble, with a 'Training Guides' button.
- Raise Query**: Icon of a question mark, with 'Create New' and 'Browse' buttons.
- Operations Centre**: Icon of a telephone handset, with a large blue button.
- Email Us**: Icon of an envelope with an '@' symbol, 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.

