matrix
security watchdog

Matrix Security Watchdog

Matrix Screening, powered by Prism

Frequently Asked Questions

DATE: July 2025

Welcome to Matrix Screening, your new screening platform

We're excited to welcome you to our new screening platform, designed to make the pre-employment screening process faster, smarter, and a smoother user journey from start to finish.

To help you get started, we've put together this FAQ document to answer some of the most common questions about using the new platform. Whether you're logging on for the first time or reviewing your screening progress – you'll find clear, helpful guidance here.

Our goal is to make your transition as smooth as possible. If you can't find what you're looking for in this guide, our team is always on hand to help.

How do I invite a candidate?

Access the Invitation Screen

1. Navigate to your dashboard
2. Click the "Invite Candidates" button
3. The candidate invite screen will open

Configure Your Invitation Settings

1. Select the organization that requires the check from the dropdown menu
2. Confirm the check type required for this application
3. Choose your invitation method:
   - Individual invitation: Select "Add Individually"
   - Bulk invitation: Choose "Bulk Upload" for multiple candidates

Enter Candidate Details (Individual Method)

If you selected "Add Individually", complete the following required fields:

1. Forename: Enter the candidate's first name
2. Surname: Enter the candidate's last name
3. Email Address: Provide their primary email address
4. CC Email Address: Add an optional secondary email if needed

Pro tip: Need to invite multiple candidates? Click the "Add another" link below the form to add up to 10 candidates at once.

Customise and Send

1. Select your preferred email template from the dropdown

2. Override the default template if necessary to personalize the message

3. Click "Send Invitation" to deliver the invitation to your candidate(s)

How do we complete the ID Check/Section Y?

Once your candidate has responded to the invitation, you'll need to verify their identity and complete the required documentation.

Locate the Application

1. Find the candidate's application in your dashboard – it will be in the 'To Action' category for Organisation users or the 'With Org' category for Registered Body users
2. Click on the application reference to open it
3. You'll be taken to the application summary page

Note: You can amend any details submitted on the application at this stage if corrections are needed.

Complete Section Y

1. Scroll down to the Section Y area on the summary page
2. Click the "Complete Section Y" button
3. A sidebar will open with the Section Y form
4. Fill in all required information thoroughly
5. Click "Save" to complete Section Y

Complete the ID Check

1. Scroll down to the Identity Check area on the summary page
2. Click the "Complete ID Check" button
3. A new screen will appear with two verification options:

    Option A: Digital ID Check

    - Select this if you have a digital ID verification already obtained
    - Follow the prompts to upload and verify the digital documents

    Option B: Manual Document Verification

    - Choose this option if you're verifying original physical documents
    - Select the appropriate ID documents from the dropdown lists
    - Provide additional details for specific documents (passports, driver's licenses, etc.)
    - Reference the full list of acceptable documents displayed at the top of the screen

Alternative Routes (If Needed)

If you cannot complete the ID check via the standard route:

1. Click "Use Route 2" at the bottom of the screen

2. Complete the alternative verification process

3. If Route 2 is also unavailable, select "Use Route 3" for additional options

Finalise the ID Check

1. Ensure all document details are provided accurately
2. Answer any additional verification questions
3. Click "Save" to complete the ID Check
4. You'll be returned to the summary page

Need to start over? Use the "Reset ID Check" button located near the candidate's name at the top of the screen.

How do we approve the application?

Ready to move the application forward? Here's how to give your final approval.

Verify Completion

Ensure both required sections are complete:

- ID Check status shows as completed
- Section Y status shows as completed

Submit for Approval

1. Locate the "Approve" button next to the "Reset ID Check" button
2. Click "Approve" to confirm you're satisfied with all submitted information
3. A confirmation bar will appear at the top stating: "The application is now ready to be authorised by a Countersignatory."

The application will now move to the next stage for countersignatory review before being sent to DBS for processing.

How do we countersign the application?

As a countersignatory, you'll review and authorize approved applications before they're sent for final processing.

Access Applications Ready for Review

1. Navigate to your dashboard
2. Click on the "To Action" folder
3. You'll see a list of all applications that have been approved and are awaiting countersignature

Review the Application

1. Select the application you want to review
2. Complete all necessary countersignatory verification steps
3. Thoroughly check all candidate information and documentation

How do we raise any query notes?

If you need to question any aspect of the application:

1. Navigate to the Notes tab
2. Add a new note with your query
3. Select "Query" as the Note Type
4. A red query flag will appear on the application until the issue is resolved

Countersign the Application

1. When you're ready to approve, click the "Countersign" button (located near the candidate's name)
2. A green confirmation popup will appear confirming successful countersignature
3. The application will now proceed to DBS for processing

Need to retract? If you need to reverse the countersignature, use the retraction button that appears where the original countersign button was located.

How do we track an application once it is countersigned and sent to DBS?

Stay updated on your applications as they move through the DBS processing system.

Access In-Progress Applications

1. Go to your dashboard
2. Click on the "In Progress" folder
3. You'll see all applications currently being processed by DBS

Track Individual Applications

1. Locate the application you want to monitor
2. Click the "Track" icon on the right side of the application row
3. View the current status and any updates from DBS

How do we review the e-Result?

Once DBS has processed applications, you can access the results and download the necessary documentation.

Access Completed Applications

1. Navigate to your dashboard
2. Click on the "Completed" folder
3. You'll see all applications where e-Results have been successfully returned by DBS

Review Application Status

Check the Status column on the right side of each application:

- "Application Complete": No information recorded on the certificate
- "Certificate Review Required": Information has been recorded and requires your attention

View e-Results

1. Click on the completed application
2. Navigate to the Candidate Details section in the summary
3. The e-Result will be displayed here for your review

Download Documentation

1. Within the application summary, locate the Checks Required section
2. Click the "Download" button
3. A PDF snapshot will be downloaded for your records and sharing as appropriate

Important: *Applications marked as "Certificate Review Required" indicate that additional information appears on the certificate and should be requested from the candidate for review.*