



RECRUITMENT
FUNDING SOLUTIONS



RFS Protect Portal User Guide





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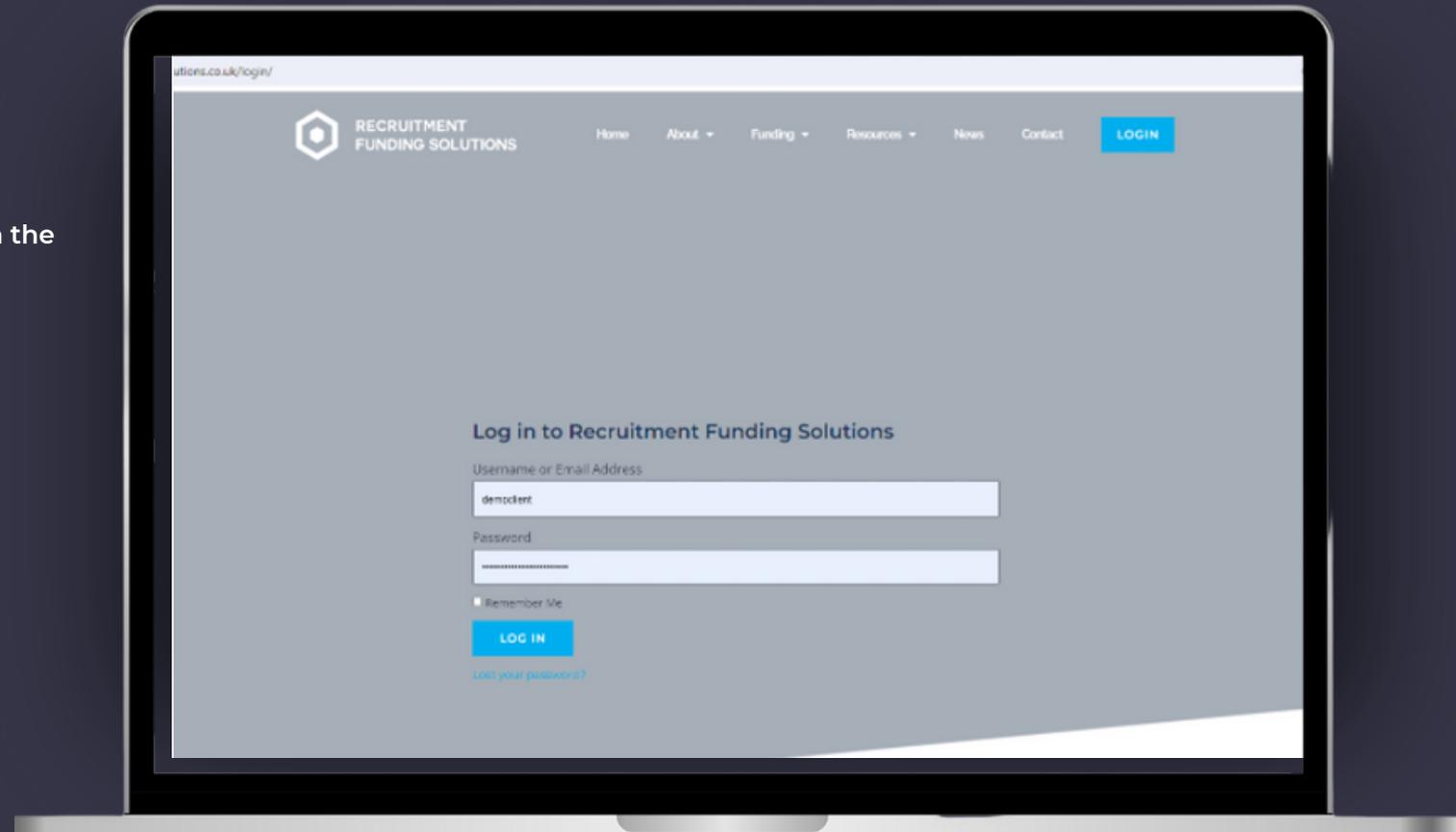
Logging in to your RFS Protect portal



Logging in to your RFS Protect portal

Your Account Manager will create your portal and you will receive an email with the log in details.

Your log in page will look like this:

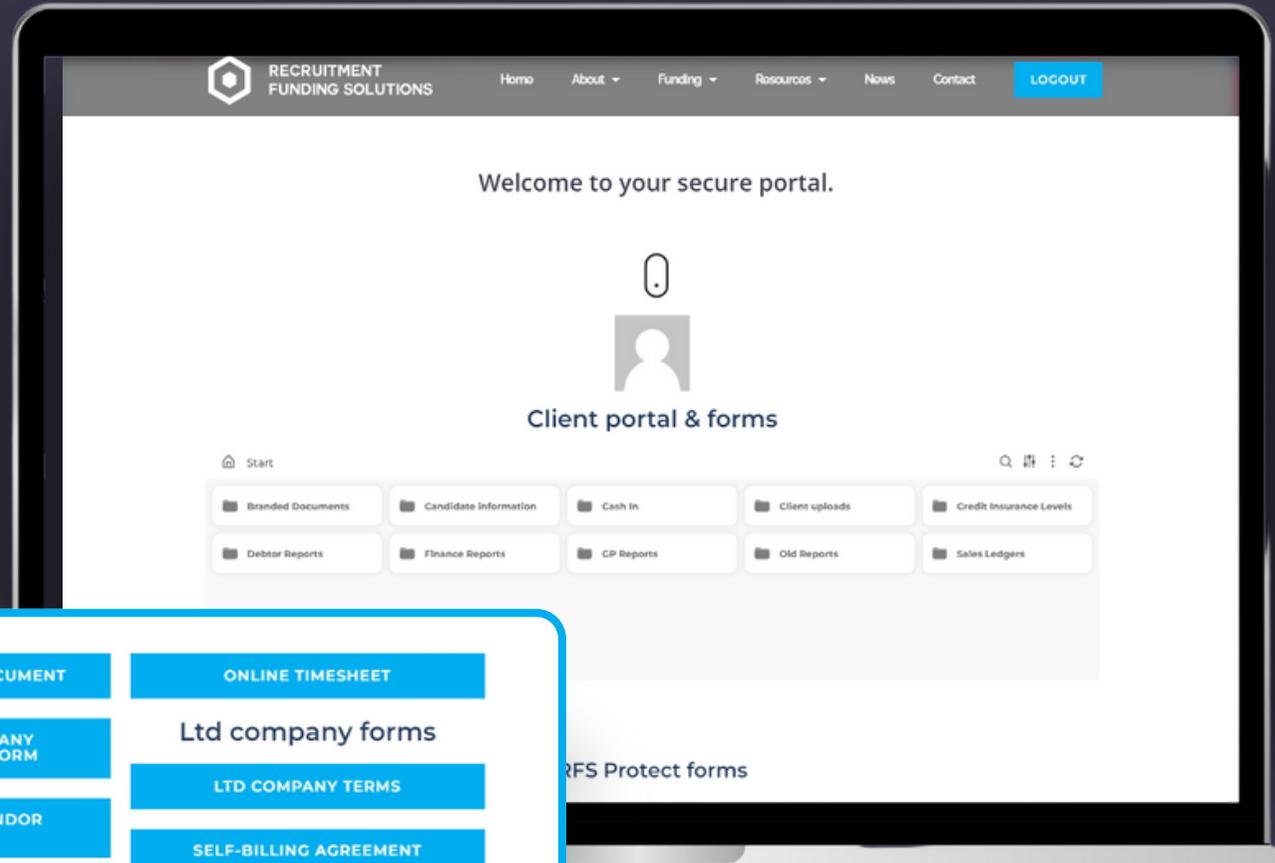




Logging in to your RFS Protect portal

Once logged into your portal this is where you will find all the documents and forms you need.

You are an RFS Protect Client so all your forms are the blue boxes.



NEW CLIENT CREDIT CHECK	KEY INFORMATION DOCUMENT	ONLINE TIMESHEET
NEW CLIENT SET UP	SEND SMALL COMPANY EXEMPTION (IR35) FORM	Ltd company forms
NEW CANDIDATE SET UP	SUBMIT MASTER VENDOR DETAILS	LTD COMPANY TERMS
NEW ASSIGNMENT SET UP	SEND MEDICAL QUESTIONNAIRE	SELF-BILLING AGREEMENT



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Credit checks

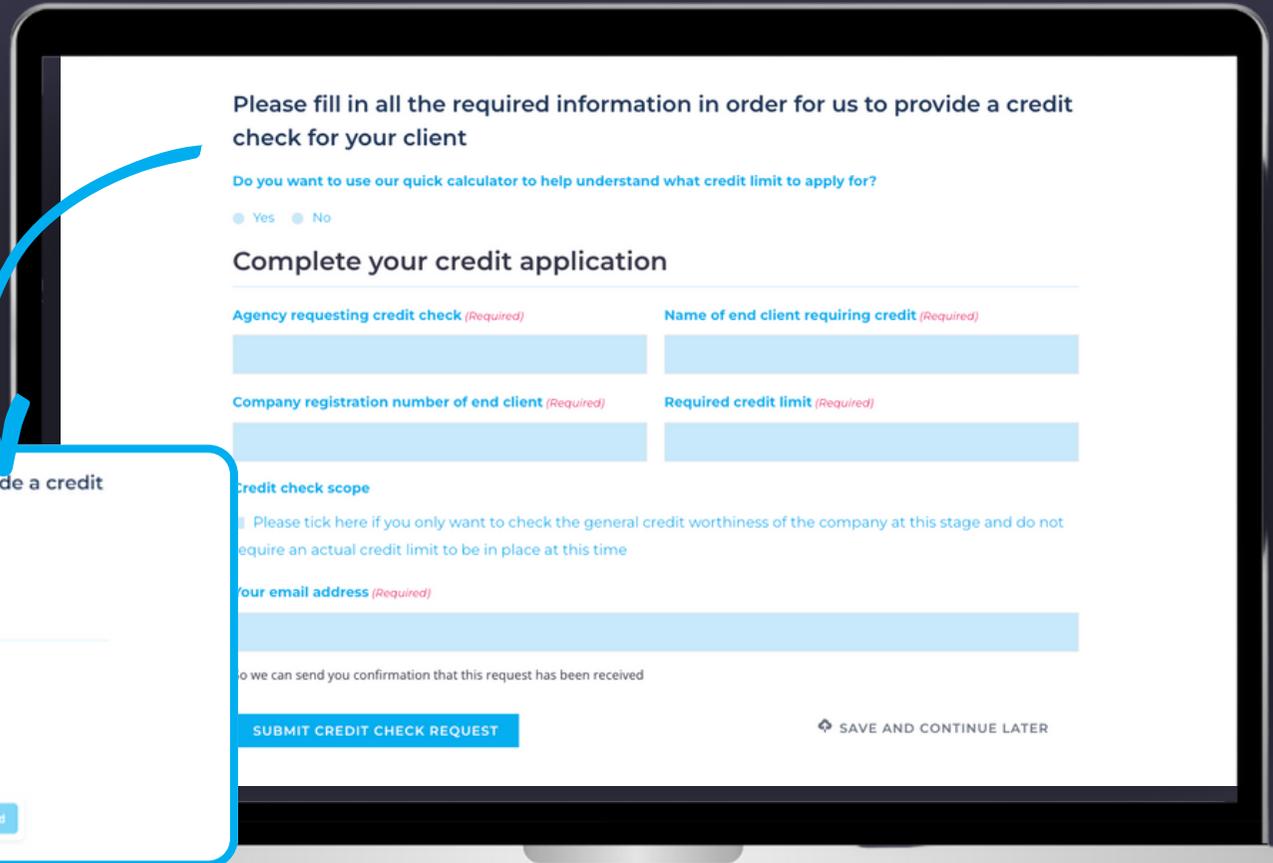


Credit checks

All end clients need to be credit checked before terms can be sent out.

Click on the new client credit check box this will open the credit check form.

**Please note if you are unsure what credit limit you need on a client you can use our calculator tool at the top of this page. By clicking on 'yes' to 'do you want to use our calculator tool' it will open the below an a few questions will be asked to get the credit limit you will need.*



Once you have completed the details on the credit check sheet press submit credit check request, this will then come through to the Protect team who will pick up the credit check.



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New client set up form



New client set up form

Once credit has been accepted, we require the new client set up form to be completed.

This information needs to be as accurate as possible as this is what we will use to send out terms of business and to set up the client ready for invoicing.

Please complete all boxes on this form.

Once completed press submit, the form will then come through to the protect team, once received terms of business will be sent to your client for signature.

Once terms of business are received back signed you can now send your workers out to work for that client.

New client set up

Agency requesting credit check <i>(Required)</i>	Name of end client requiring credit <i>(Required)</i>
<input type="text"/>	<input type="text"/>
Company registration number of end client <i>(Required)</i>	Requested credit limit <i>(Required)</i>
<input type="text"/>	<input type="text"/>
End client's registered address <i>(Required)</i>	
<input type="text"/>	
Booking contact <i>(Required)</i>	Accounts contact <i>(Required)</i>



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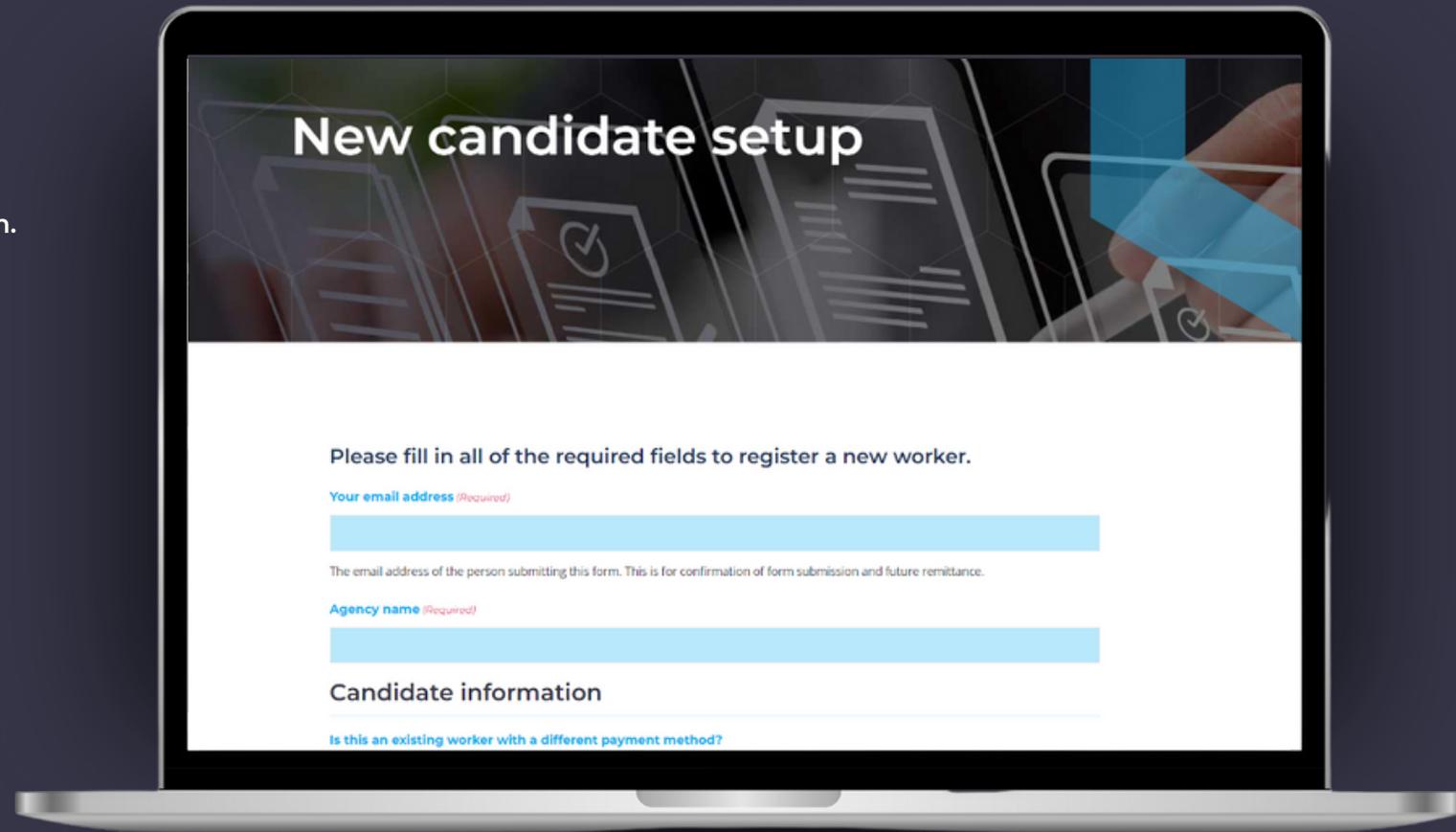
Setting up candidates



Setting up candidates

Click on the new candidate set up box.

Complete all the candidate's information.



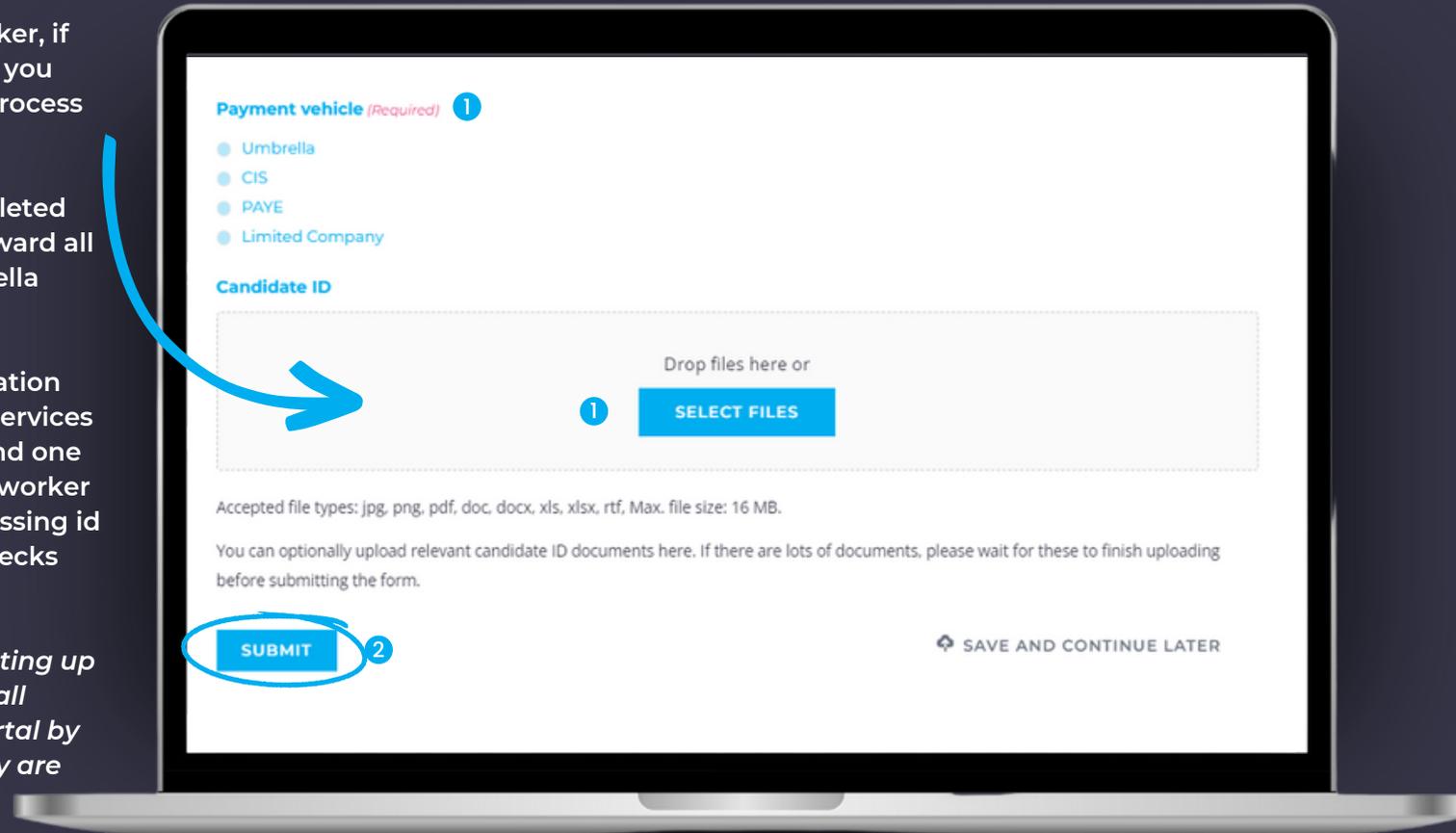


Setting up candidates

- 1 Select the payment type for the worker, if you have ID on file for the candidate you can upload here to quicken up the process of registering the workers.
- 2 Once all information has been completed click submit. The team will then forward all the information to the correct umbrella company for Umbrella /CIS workers.

For PAYE workers – once the information has been completed, a contract for services is sent to the worker for signature and one of the compliance team will call the worker to confirm details and collect any missing ID ready for the digital right to work checks via Trust ID.

**Please note that the process for setting up PAYE workers takes slightly longer, all workers need to be added to the portal by 9am the Friday the week before they are due pay.*





New assignment setup

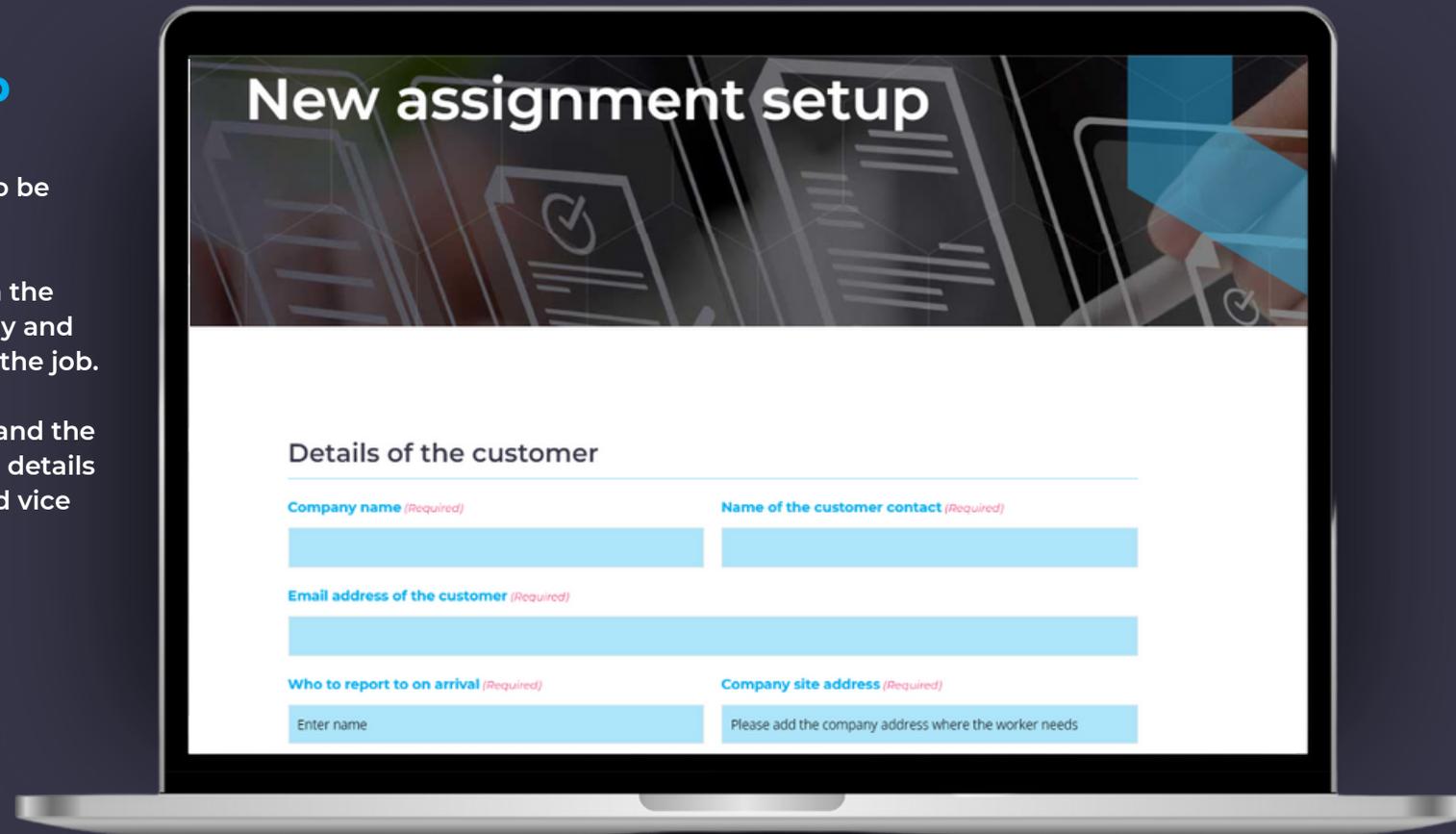


New assignment setup

For each worker an assignment needs to be created.

A copy of the assignment is sent to both the worker and the client confirming any pay and charge rates and any details relevant to the job.

The worker will not see the charge rate and the client will not see the pay rates, only the details relevant to the worker will be shown and vice versa for the client.





Key information documents (KIDs)



Key information documents (KIDs)

Key information documents are for PAYE and Umbrella workers only.

This gives the worker an idea of take-home pay after deductions.

Use this form to generate a Key Information Document that will be sent to a worker.

Key Information Document - required information

Worker name <i>(Required)</i>		Worker email address <i>(Required)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
First	Last	
Expected Umbrella rate of pay (per hour) <i>(Required)</i>	Expected hours per week <i>(Required)</i>	Umbrella fee <i>(Required)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Agency name <i>(Required)</i>	Company name (employer) <i>(Required)</i>	Umbrella name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Share this Key Information Document

Consultant name <i>(Required)</i>		Consultant email <i>(Required)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
First	Last	

Add a consultant's email address to send a copy of this Key Information Document and PAYE / Umbrella illustrations to them.

Please note: you must include worker and consultant emails before you can share this illustration.



Timesheets



Timesheets

RFS clients can use the online timesheets on the portal or the PDF versions within the branded documents folder.

To use the online timesheets, you need to complete all the boxes for your agency at the top, then names of the workers and add the hours in for each day.

The online timesheet can have multiple workers added if you run out of lines for workers simply click on the plus sign as many times as you need.



Online timesheet

Agency details

Name (Required)

First name Last name

Week ending (Required)

Agency name (Required)

Agency email address (Required)

Worker details

(Required)

Job title	PO Number	Mon	Tue	Wed	Th	Fri	Sat	Sun	Total hrs	Basic hrs	OT rate
<input type="text"/>											
<input type="text"/>											
<input type="text"/>											
<input type="text"/>											



Timesheets

Once all workers hours have been added complete the client details of who the timesheet needs to be sent to for sign off.

Once submitted the client will receive the timesheet to sign. Once signed the timesheet will go to the RFS timesheets inbox, and a copy will be forwarded to you for your records.

Client declaration

Please confirm you agree with this statement (Required)

I confirm that the total hours are correct and the people named above have completed the assignment satisfactorily. Payment is to be made in accordance with Recruitment Funding Solutions Terms of Business which I accept as the basis for this transaction.

Client contact name (Required)

First name

Last name

Client contact position

The position of the approver at the client company

Client company name (Required)

The name of the company

Client email address (Required)

The email address of the approver the timesheet will be sent to

SUBMIT FOR APPROVAL

Save and Continue Later



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Limited company workers



Limited company workers

If you have an end client who meets small company exemption for Ltd companies, please send the end client the small company exemption form from your portal.

This is a statement to say that they don't meet the criteria for the new IR35 Legislation.

Agency instructions

Before arranging an IR35 assessment it is important that we check first if the small company exemption applies.

To do this, fill in the boxes below to send a link to your client so that they can confirm if they are eligible for the small company exemption (IR35). Your client will receive an email invite to complete a simple form which asks them to confirm whether two or more of the exemption criteria applies to their company. If the small company exemption applies, then the previous IR35 rules will be relevant and it is the responsibility of the contractor to determine their IR35 status and no IR35 assessment is required.

Agency details

Agency contact name *(Required)*

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Agency company name *(Required)*

Agency email *(Required)*

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Client details

Name *(Required)*

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Client company name *(Required)*

Client email *(Required)*

<input type="text"/>	<input type="text"/>
----------------------	----------------------



Limited company workers

Limited company workers need terms sending for signature.

You can do this by clicking 'Ltd Company terms.'

Once the worker has signed the terms, they will come back to the RFS team.

LTD company terms

About the worker

Name *

First Last

Limited company name * Their email *

Your details

Your name *

First Last

Your company name * Your email address *

SEND



Limited company workers - self-billing

Should the limited company just wish to be paid off the timesheet and not submit an invoice each week, they can simply sign the self-bill agreement.

This can be sent from your portal by clicking self-billing.

Once signed the RFS team will receive the completed document.

Medical questionnaires are optional depending on if your end client requires a medical questionnaire to be completed.

Registered Limited Company Name *(Required)*

VAT number *(Required)*

Start date *(Required)*

Is the end date known?

Yes

No

Open ended

Name of the person to sign the form *(Required)*

<input type="text"/>	<input type="text"/>
First	Last

The email address of the person to sign the self-billing agreement *(Required)*

SUBMIT 🔄 SAVE AND CONTINUE LATER



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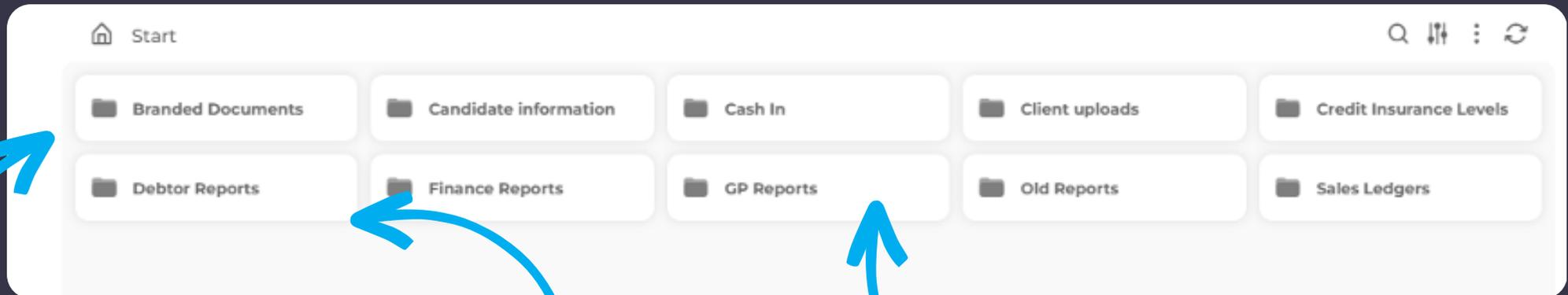
RFS Protect Folders





RFS Protect folders

These folders are used to upload information on a weekly basis.



RFS will run margins and management information each Friday and then upload to these folders:



Branded documents folder

This folder holds the PDF timesheets branded with your logo.



Debtor reports

This folder holds all the management information which are uploaded each Friday.



GP reports

Each Friday the margin report will be uploaded to this folder for you to be able to see what you have made each week and to be able to send us the invoice for the margin.



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