RECRUITMENT
FUNDING SOLUTIONS

RFS Protect

Portal User Guide

www.recruitmentfundingsolutions.co.uk

RECRUITMENT
FUNDING SOLUTIONS

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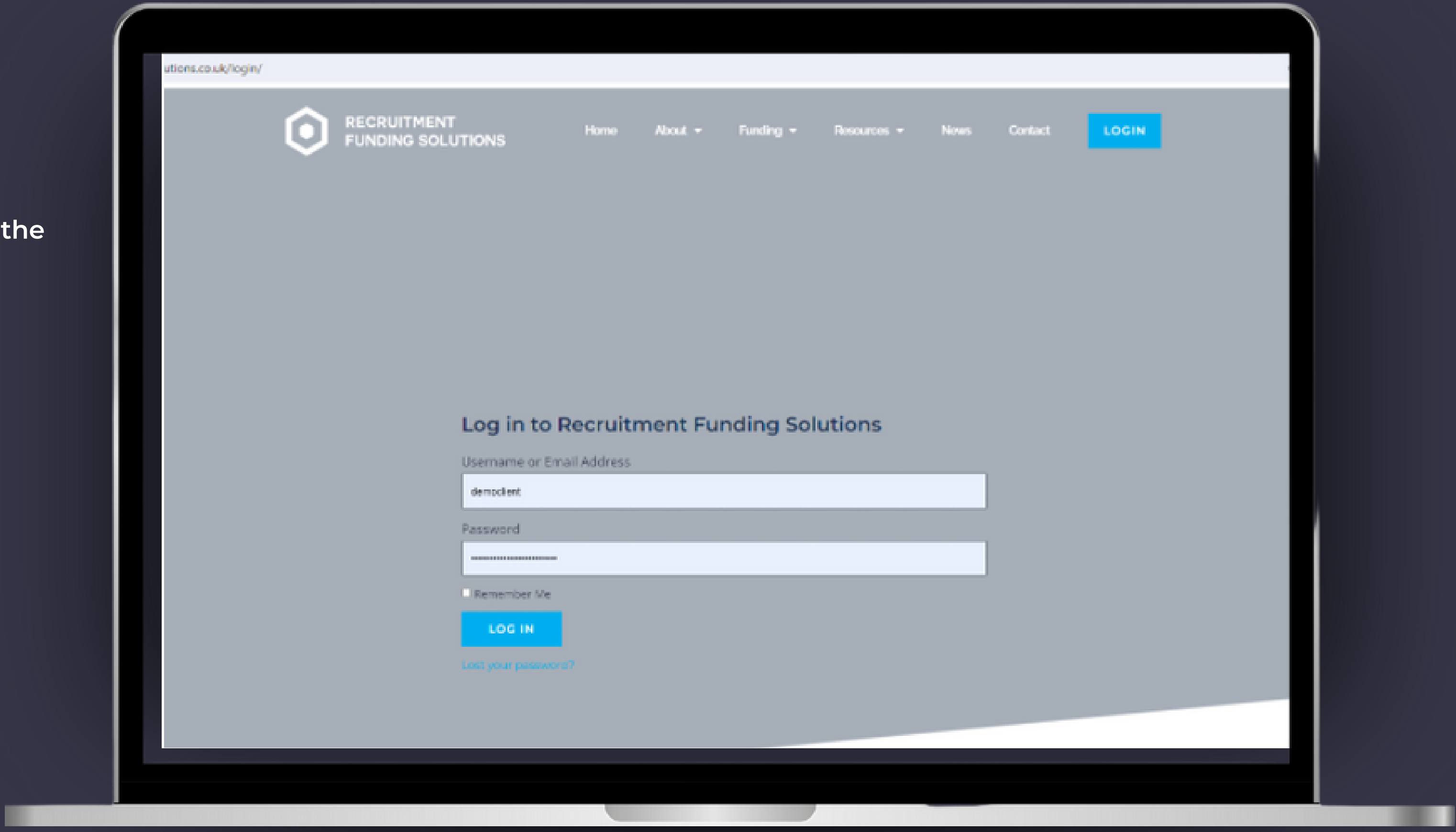
RECRUITMENT FUNDING SOLUTIONS

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:



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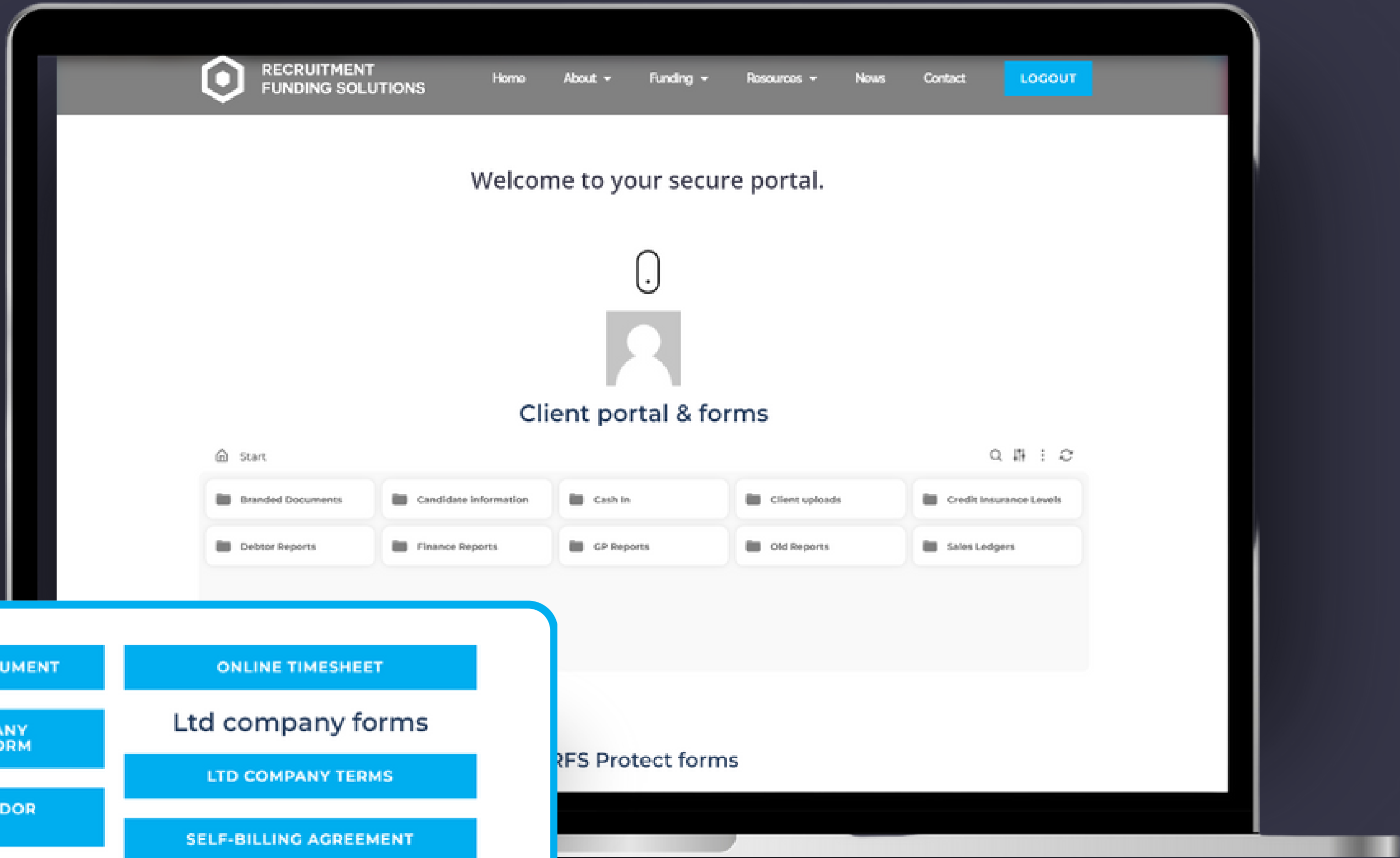
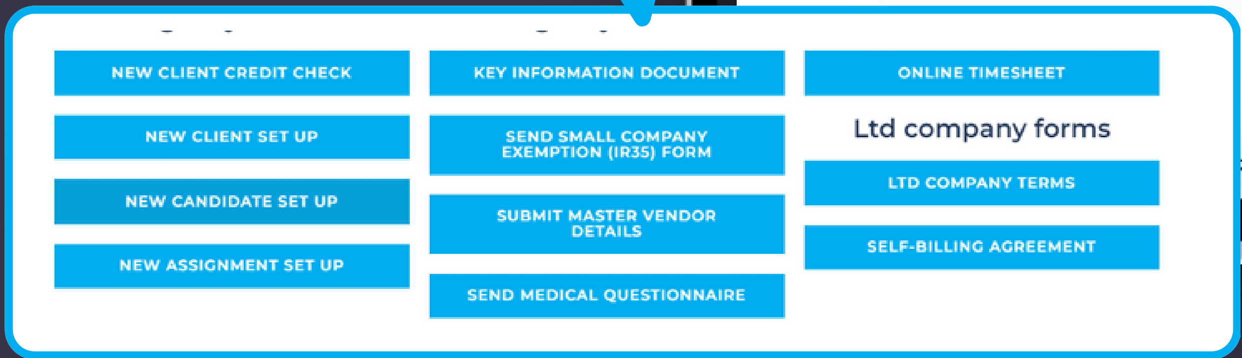
Logging in to your RFS Protect portal

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.





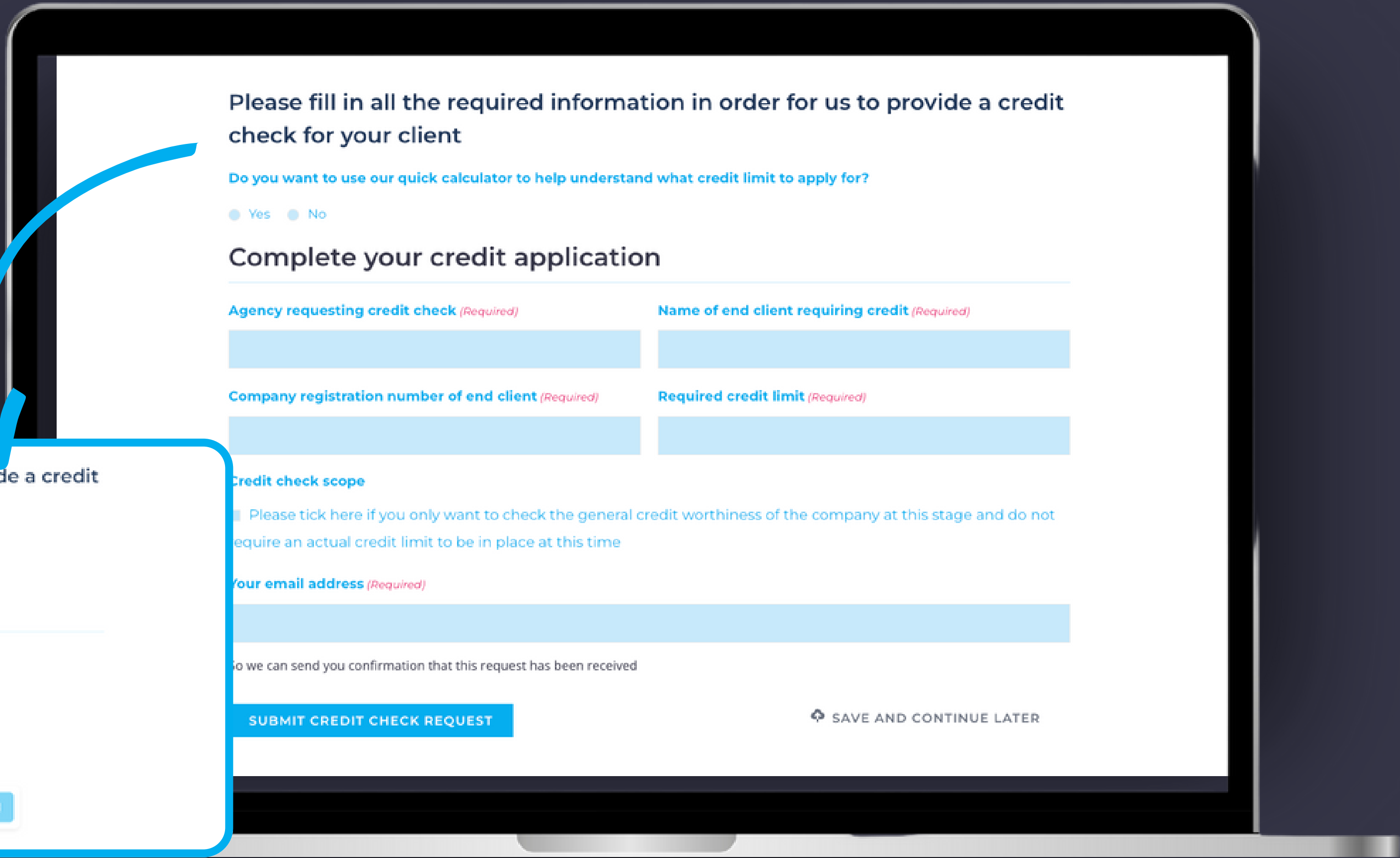
Credit checks

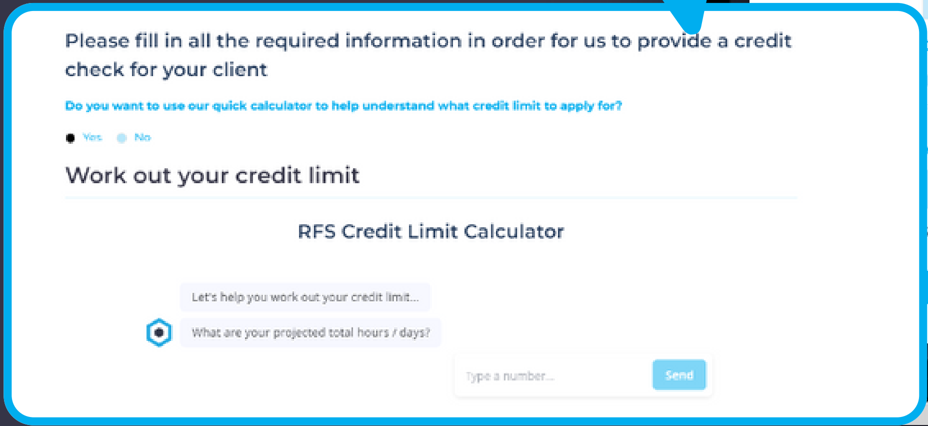
Credit checks

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.

New client
set up form

New client set up form

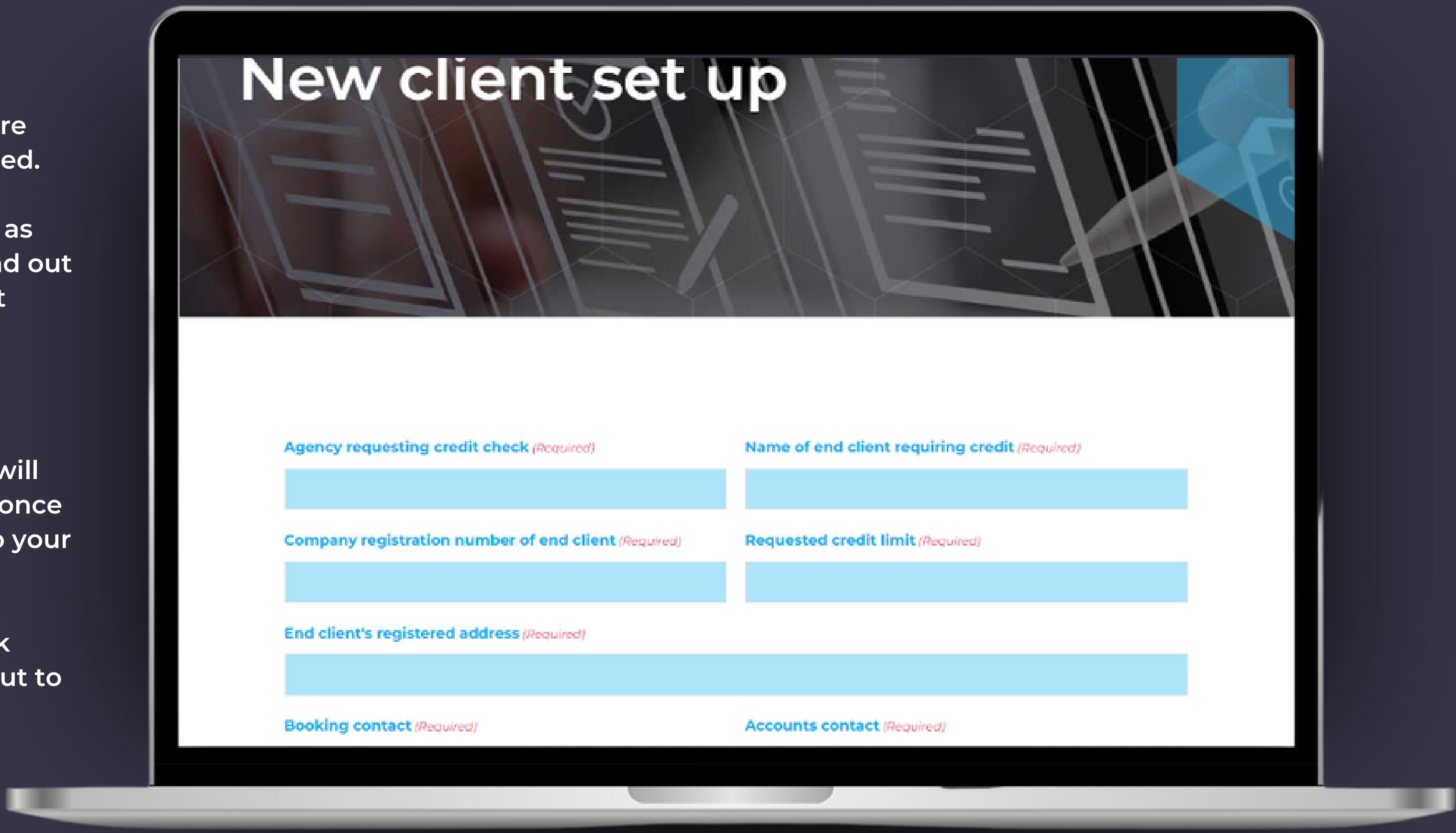
Once credit has been accepted, we require the new client set up form to be completed.

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.

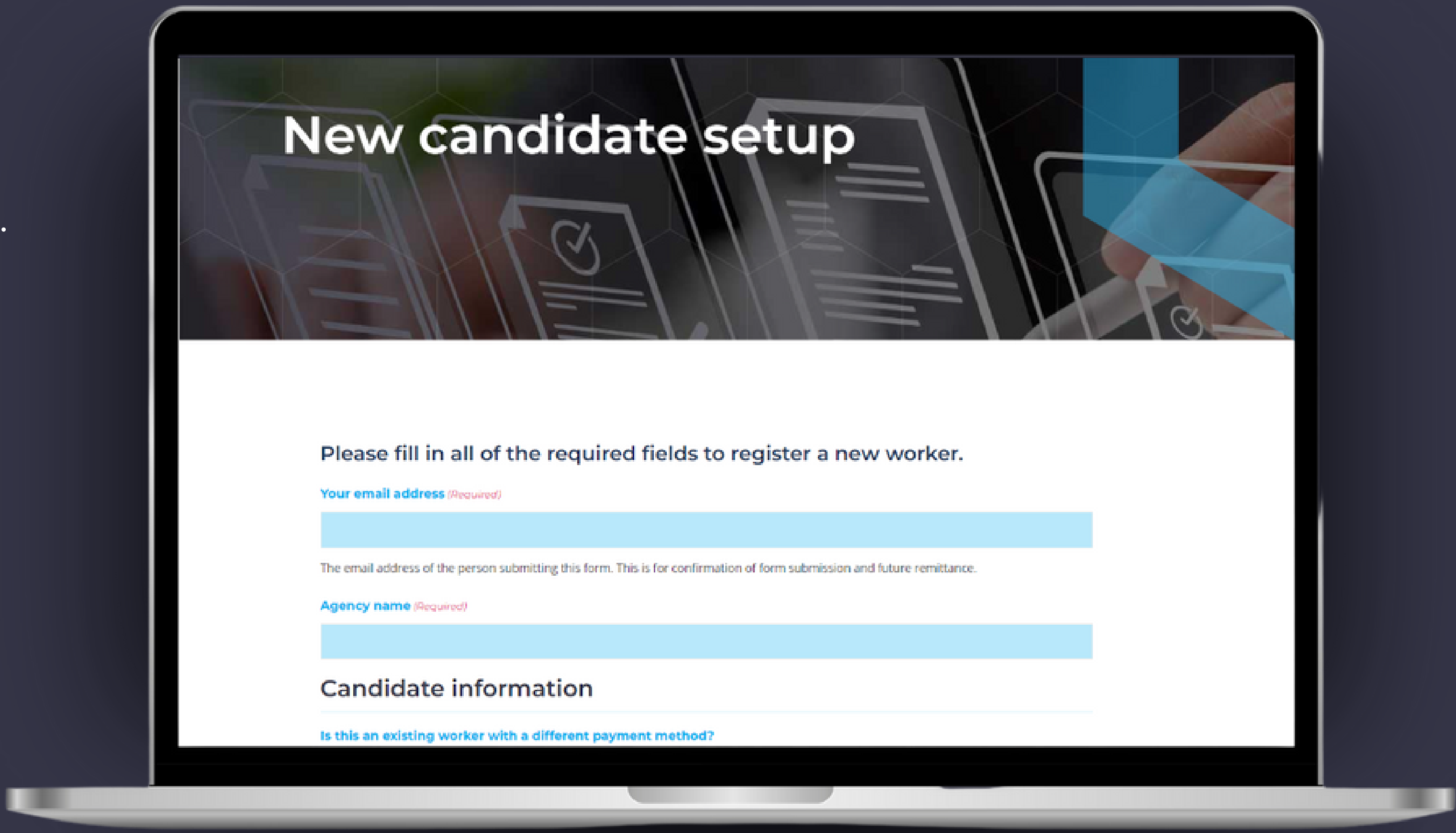


Setting up candidates

Setting up candidates

Click on the new candidate set up box.

Complete all the candidate's information.



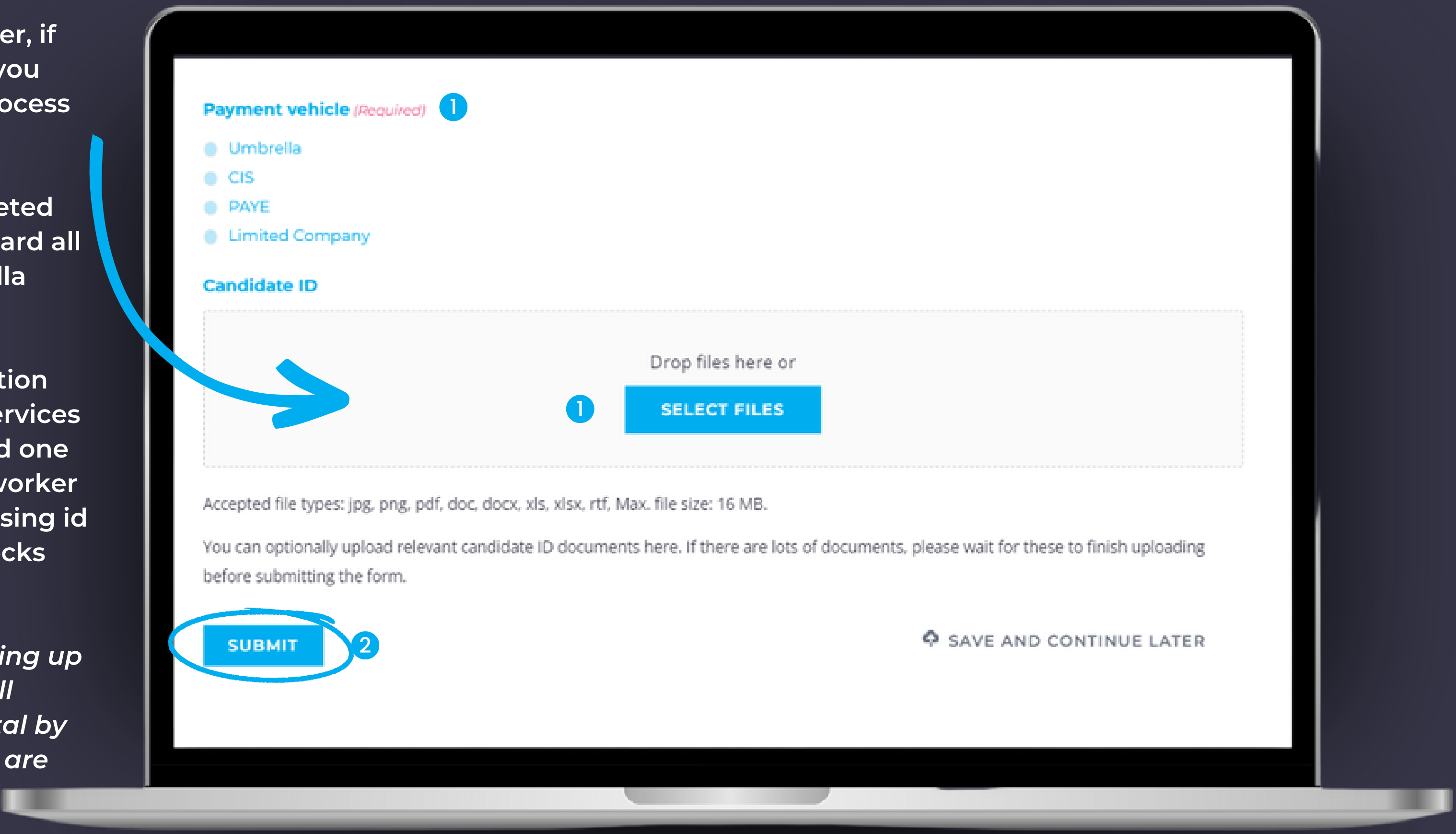
Setting up candidates

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.*



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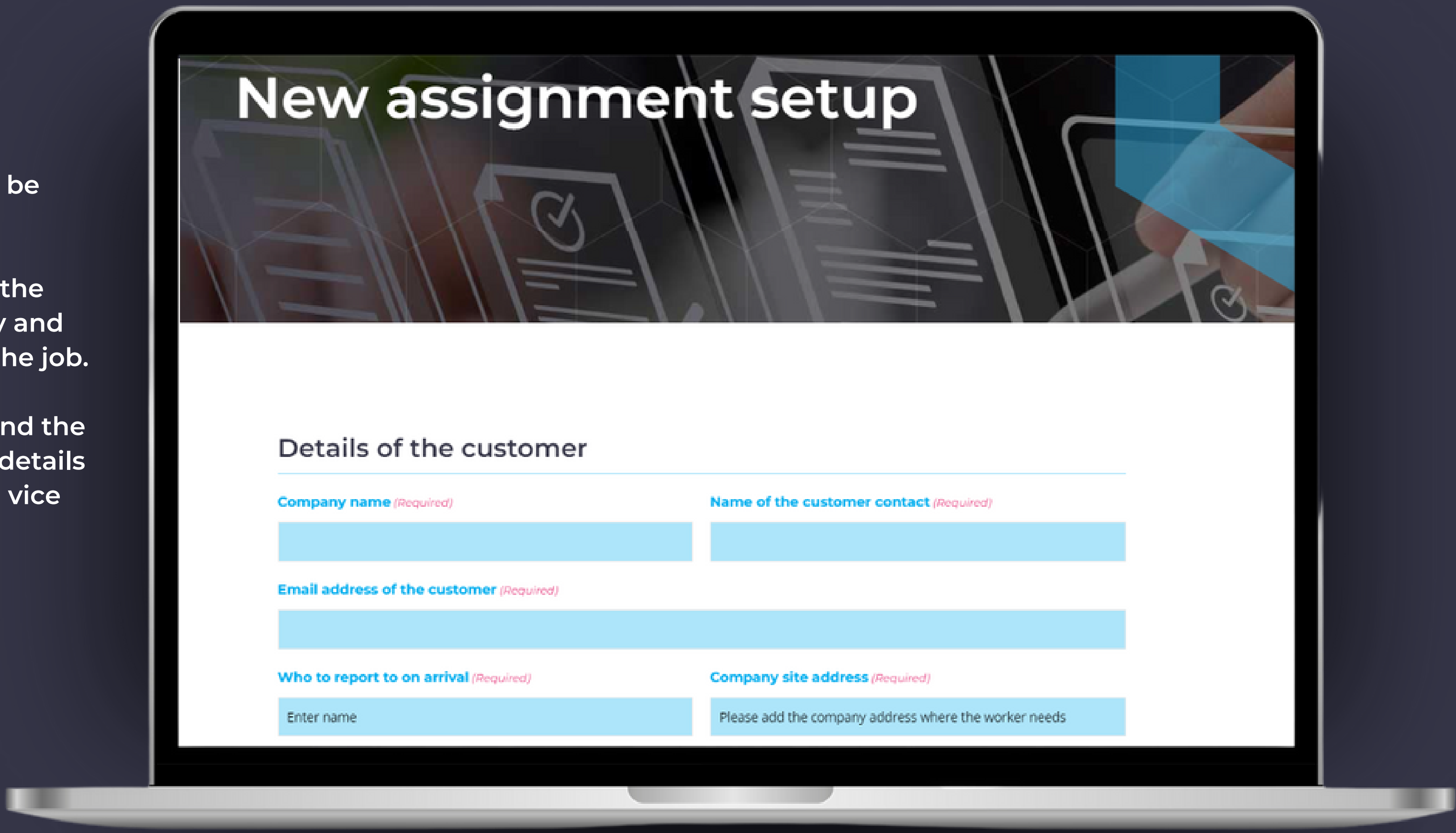
New assignment setup

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.



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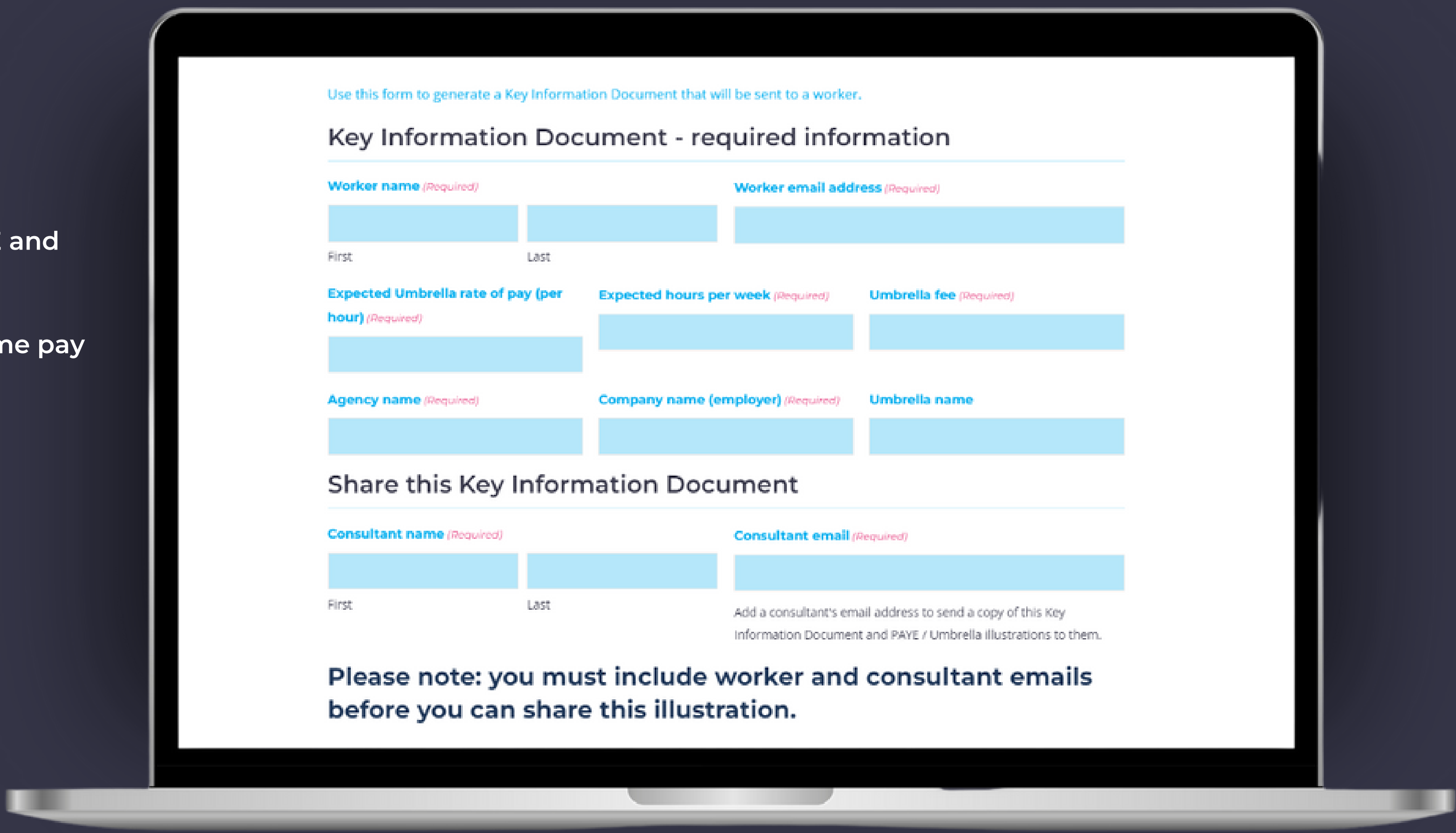
Key information documents (KIDs)

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.



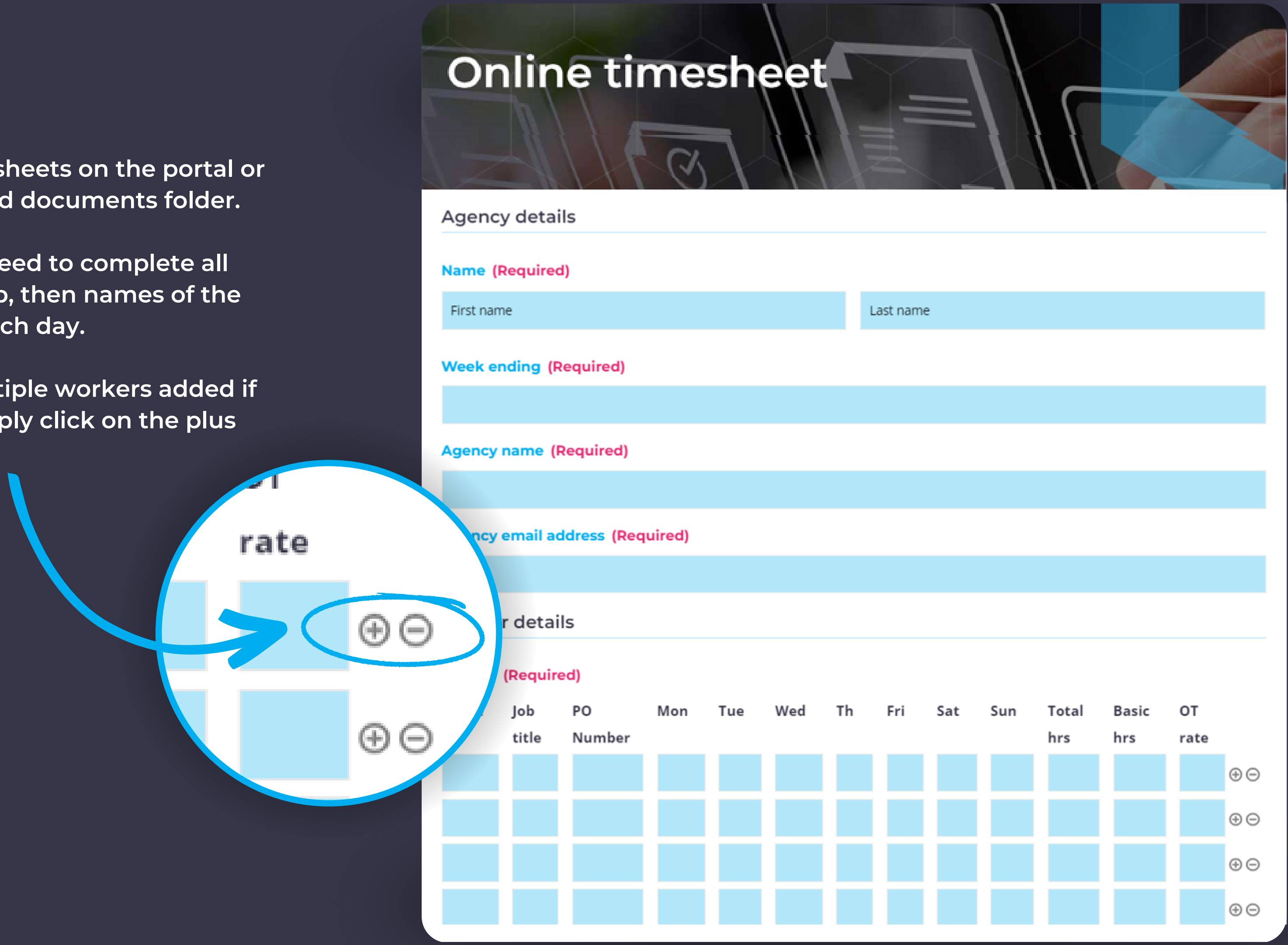
Timesheets

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.

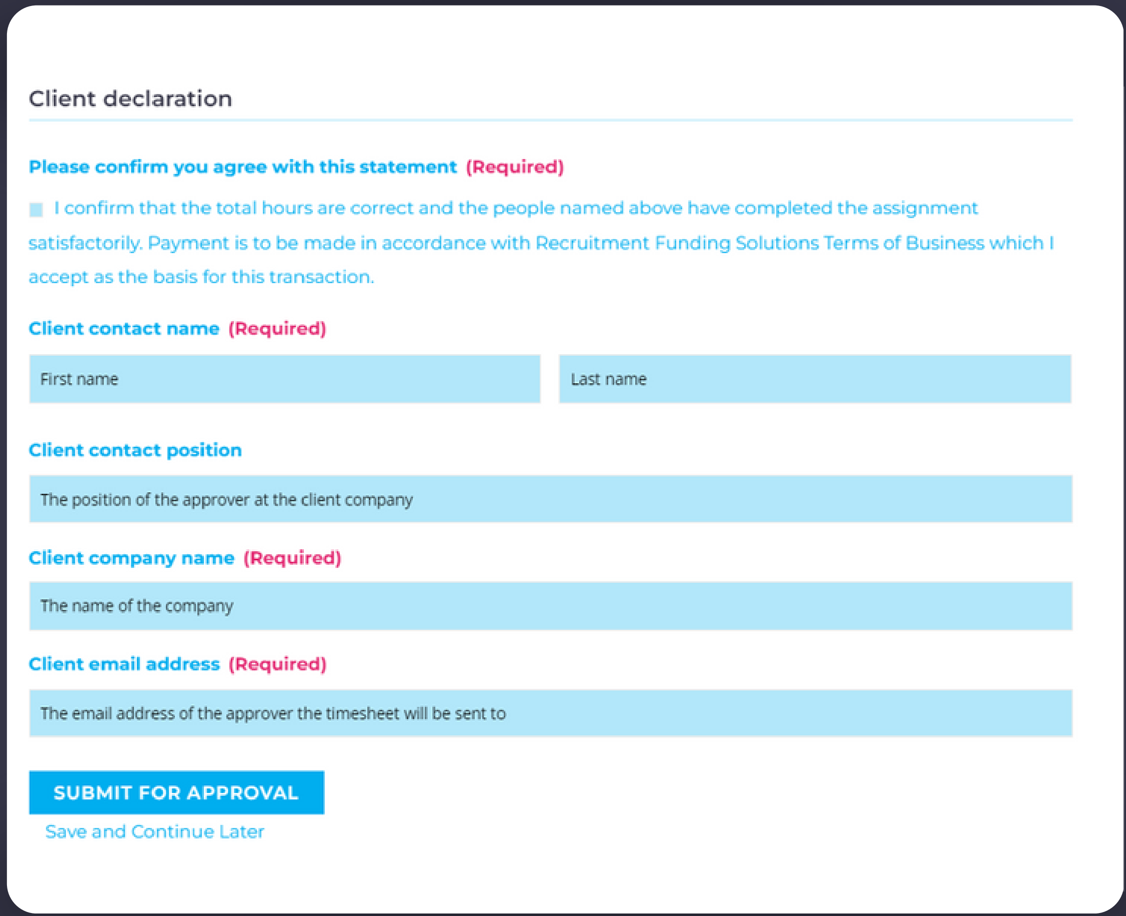
The online timesheet can have multiple workers added if you run out of lines for workers simply click on the plus sign as many times as you need.



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.

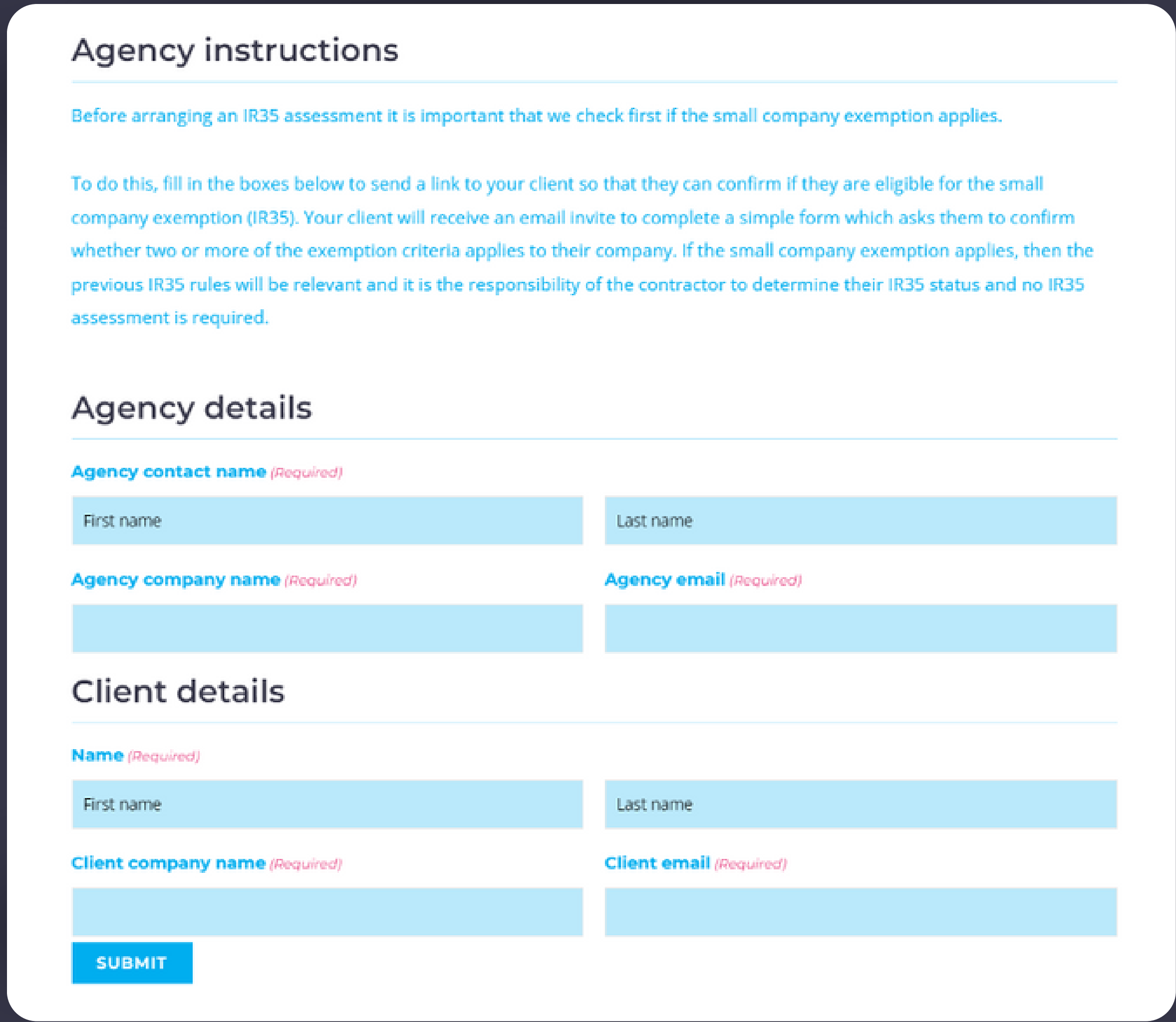


Limited company workers

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)*

First name

Last name

Agency company name *(Required)*

Agency email *(Required)*

Client details

Name *(Required)*

First name

Last name

Client company name *(Required)*

Client email *(Required)*

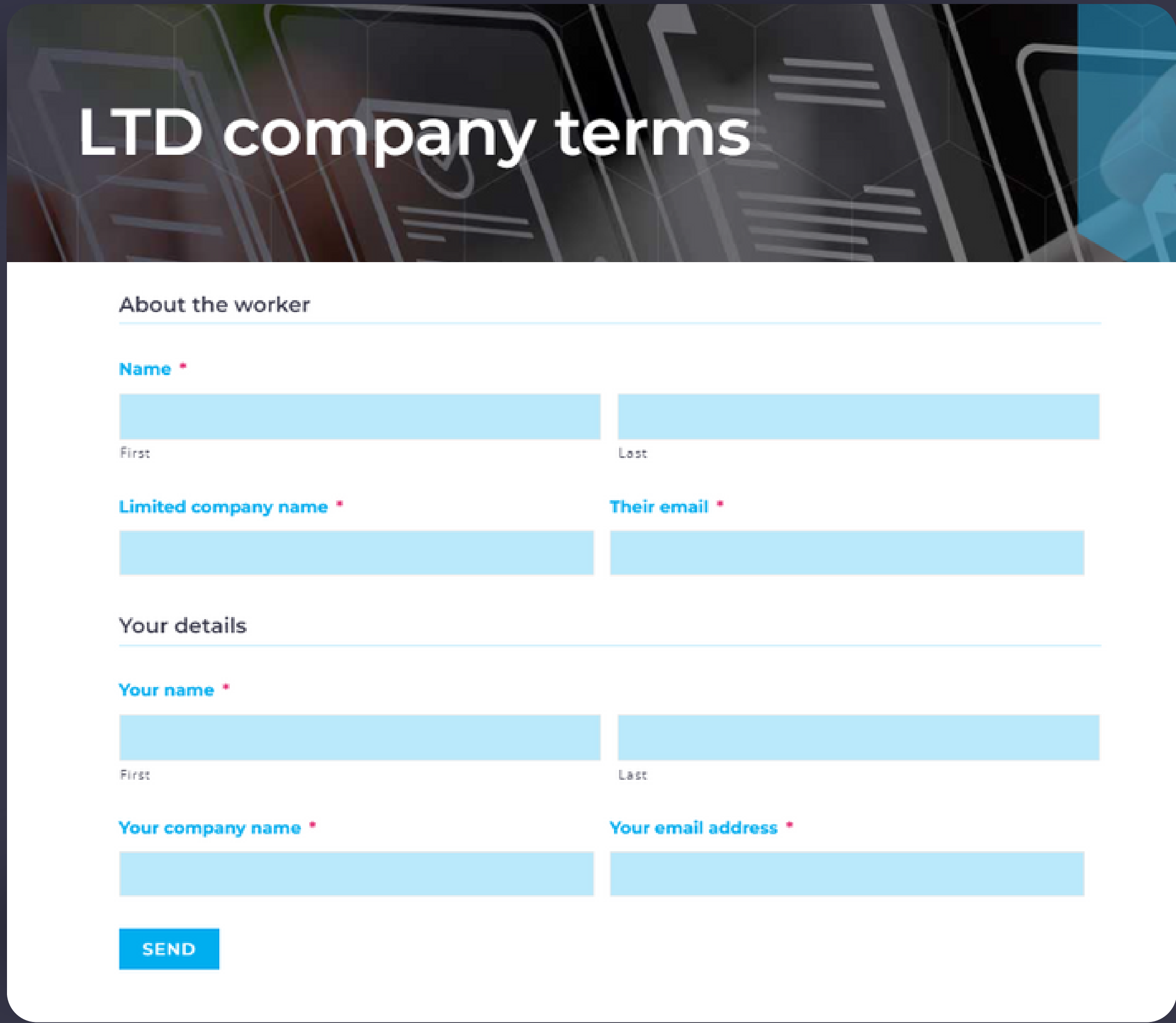
SUBMIT

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

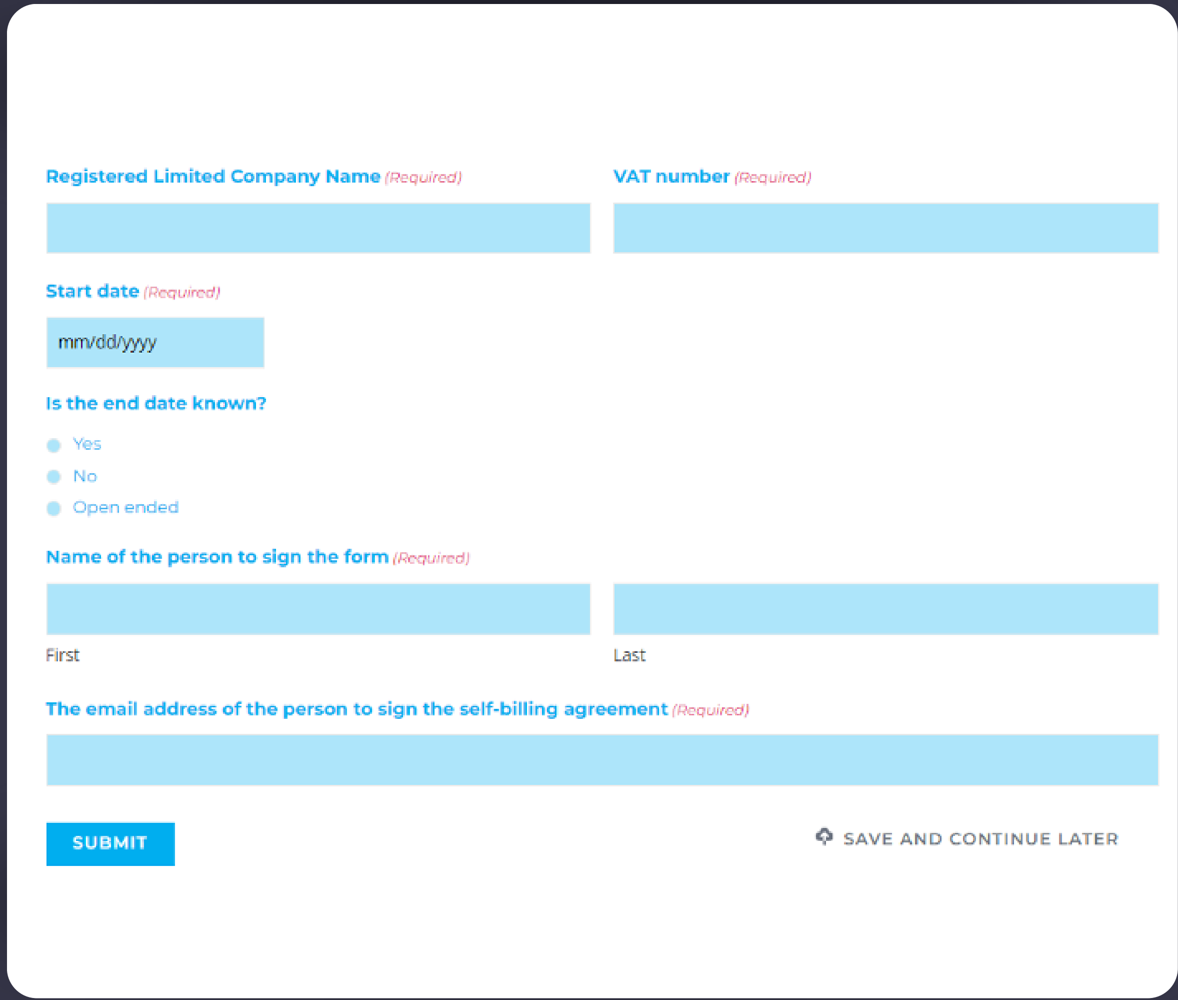
Limited company workers - self-billing

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)*

mm/dd/yyyy

Is the end date known?

- Yes
- No
- Open ended

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

First

Last

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

SUBMIT

SAVE AND CONTINUE LATER

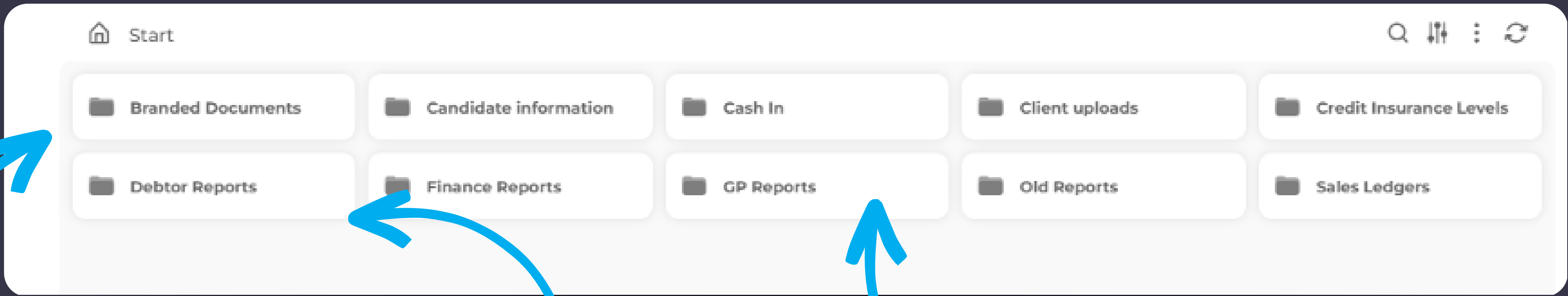
RECRUITMENT FUNDING SOLUTIONS

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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