

First Steps

Once you have received your invitation email, you will be required to access your portal and input your personal details. Once done, you should change your password to something more secure within the 'My Account' section within the portal.

Setting up two-factor authentication

Once you have created your account on the portal you will be asked to set up two-factor authentication to ensure that your account remains fully secure and only accessible by yourself.

If you do not have an authenticator app on your mobile already, we would advise that you download a two-factor authenticator app like [Microsoft Authenticator](#) for Windows Phone, Android and iOS or [Google Authenticator](#) for Android and iOS.

Scan the QR Code or enter the key provided by iR35 Resolve (which can be a mixture of 32 random letters & numbers) into your two factor authenticator app. (Spaces and casing do not matter). **Or**, you will be provided with a QR code that you can scan.

Once you have scanned the QR code or input the key above, your two factor authentication app will provide you with a unique code. Enter the code in the confirmation box upon request.

Each time you log-into the portal you will need to open the two-factor authenticator app where you will be provided with a code to enter into iR35 Resolve.

Dashboard

The dashboard is very easy to navigate and easy to use. Everything you need in relation to iR35 assessments can be found within the main page of your dashboard.

You will access information via the left hand side of the dashboard.

The main portal menu consists of;

- Assessments
- My Account (from here you can change your password and view your profile details)
- Logout

Guidance on the status updates and status terminology can be found [HERE](#) in our glossary.

Managing Assessments

To understand which cases require your input, you can filter your dashboard to find the cases which specifically require your action.

There are two possible ways to do this;

1. 'Search & Filter'

On the right hand side of your dashboard, you will have a search box. To find the contractor assessment that requires your input you will need to search their full name within the search bar.

2. 'Status Order'

On the dashboard you will have several headings containing details pertaining to the completed assessment.

Reviewing an Assessment

It is important that if the determination is Indicative of Employment (inside iR35) that until the case status is recorded as 'Case Closed', the contractor can appeal the determination made, if the appeal is accepted the determination will then change.

You will need to ensure that you monitor any appeals to ensure that you are up to date with the correct determination made.

Appeal Submitted

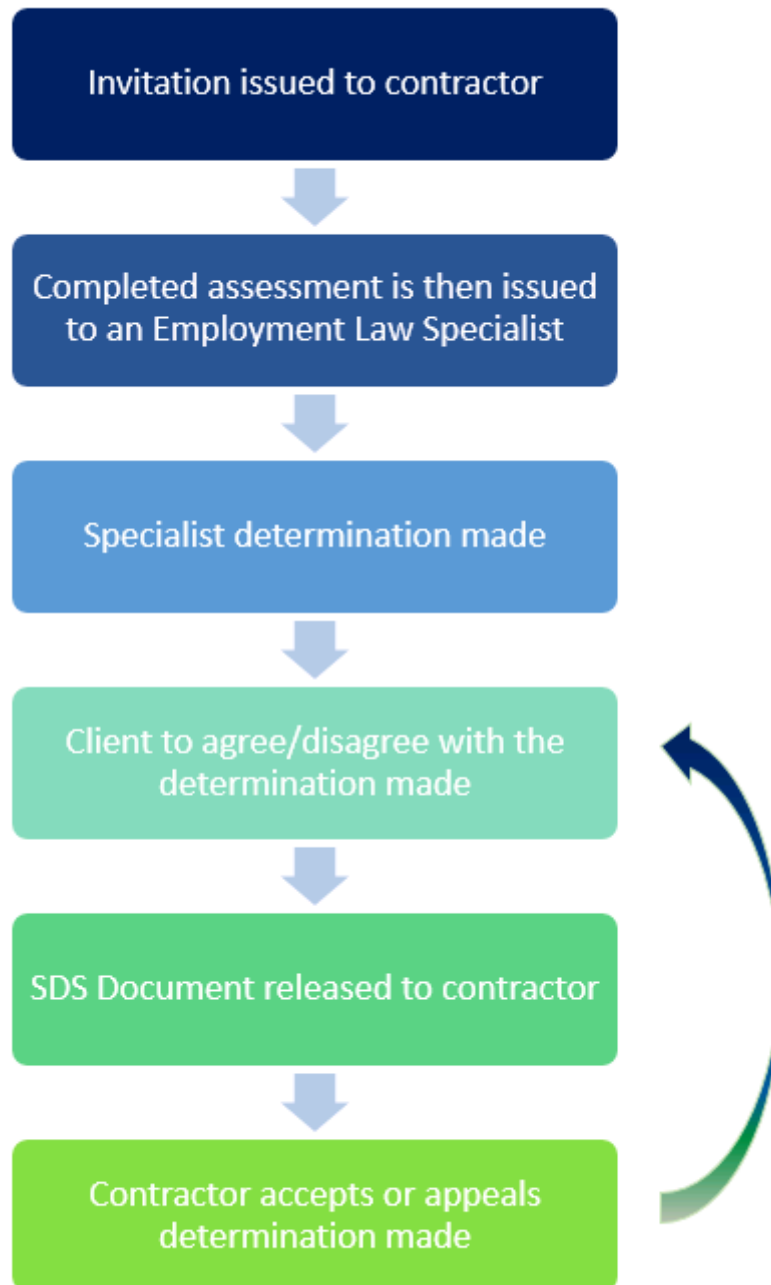
As per the legislative requirements, a contractor has the ability to appeal the decision made by the Employment Law Specialist, and the client if they believe this to be incorrect or they have grounds for an appeal to be made. If an appeal has been submitted by the contractor, the dashboard will be updated with the case status "Review Appeal", the client will need to action the appeal within **45 days**.

The appeal process is completely client led. Any appeal made by the contractor is not returned to the Employment Law Specialist. If/when a contractor creates an appeal against the determination, the client will need to decide if they wish to uphold the original decision or, accept the appeal. The client will also need to provide their reasoning.

When submitting the appeal the contractor should provide the client FULL details and comments on why they are appealing. If they believe they have answered the assessment incorrectly, a new assessment cannot be submitted.

iR35olve

What's the process?



Glossary

Case Status

Case Created	Assessment invitation has been issued to the contractor
Awaiting Payment	Assessment has been completed but payment is required before the assessment has been progressed
In Review	The assessment is currently under review by Thorntons
With Client	The determination has been made by Thorntons and is currently with the client for their assessment
Awaiting SDS	The client has completed their determination but are yet to release the SDS document
SDSS Released	The client has accepted/rejected the determination made by Thorntons and the overall SDS document has now been released to the contractor
Appeal Submitted	The contractor has reviewed the SDS document and has decided to appeal the determination made – the appeal is submitted to the client for their review
Case Closed	Contractor has agreed their determination

IR35 SDS Document

A 'Status Determination Summary', or SDS for short, is the document provided upon completion of the assessment and contract review.

The SDS document will include a full view of the assessment question and the contractors answers. Alongside this, there is full visibility of the comments made by Thorntons Law and you, the client.

Determinations and their meanings

Indicative of Employment – If the SDS confirms that the answers provided are 'IOE', it will be deemed to be captured under the IR35 legislation. It will be the responsibility of the client to ensure that they deduct the relevant Tax & National Insurance Contributions from any payments in line with the pay schedule.

Indicative of Self-Employment – If the SDS confirms that the answers provided are 'IOSE', it will be deemed to fall outside of the IR35 legislation. If this is the case, the contractor can continue to resume trading through the company as "normal".