

First Steps

Once you have received your invitation email, you will be required to access your portal and input your personal details. When done, you will be asked to change your password - this ensures that your portal is secure and only you can access it going forward.

Please refer to the initial invitation email for instructions on how to complete your first steps.

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

Champion will provide you with a report to highlight which cases require your attention and you will need to use the search bar to view the specific contractors assessment. The dashboard will include a real-time status update to enable you to track IR35 progress every step of the way.

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 you 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.

Any assessments with the status of "With Client" require your input

Reviewing an Assessment

When an IR35 assessment has been completed/submitted by a contractor it is then immediately issued to our partner employment law specialists. They are tasked to review all material and provide their IR35 status opinion.

On completion of the legal review, all information and documentation will be made available for you to view and for you to either agree or disagree with the status opinion. You will receive a notification email when everything is ready for you to access.

To access review material, please select "View Assessment" within your dashboard.

[View Assessment](#)

Assessments

Search to view contractor assessments

Search by contractor full name. Searches are not case sensitive.

When you open the assessment, you will be able to view all details provided by the contractor and all comments made by the employment law specialist.

The assessment material comprises of seven sections, you will be asked to provide your own comments/responses to five of these.

Your Details

1 Your Name

Contractor Name

Assignment Details

2 Agency Name

Test Agency

Mutuality of Obligation

3 Although I am engaged on the assignment specified above, if the Client asks me to do something else, I will be obliged to do it.

- True
 False

Indicative Of Self Employment

Reviewer Comments:

"OK"

- Agree
 Disagree

ClientComment

Enter Client Comments HERE

At the end of the assessment you will be asked to confirm your overall decision based on all comments and supporting details provided. You will be required to confirm whether you accept, or reject the initial determination made.

Releasing the SDS Document:

There are two access levels within iR35 Resolve:

Normal User: these users are able to view the assessment/determination made. They are able to agree/disagree and make comments within the assessment but can only save their input. They are unable to submit & release the final SDS document.

Super User: Only super users of the portal will have permission to 'submit' the finalised assessment. It is vitally important that as a super user you do not press 'submit' until you are happy with the comments and determination that has been made by the team, hiring manager or even yourself, who has been chosen to review the assessment at your end client organisation.

Note: It is up to you, the client, to release the SDS document to all parties involved. The SDS will not be issued automatically until you specifically action the release.

An official Status Determination Summary (SDS) document will be formatted when you have made your final assessment decision.

Appeal Submitted

As per the legislative requirements, the 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", and you will need to action this within **45 days**.

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

When submitting the appeal the contractor should provide you FULL details and comments on why they are appealing. If they believe they have answered the assessment incorrectly, a new assessment cannot be submitted. Any answers they believe they have outlined incorrectly should be detailed in the appeal section. The contractor should provide evidence if/where required or where requested.

If any further clarification is required by the reviewer/employment law specialist, please contact Champion and we can arrange for this communication to be put into place.

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 Weightmans
With Client	The determination has been made by Weightmans 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 Weightmans 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 your assessment and contract review.

The SDS document will include a full view of the assessment question and your answers. Alongside this, there is full visibility of the comments made by Weightmans LLP and your 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".