

Release 2.19.11

If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- Features
- Enhancements
- System Administrator
- Fixes

FEATURES

IR35 Legislation changes

In April 2020, in addition all public authorities and medium and large sized clients will be responsible for deciding the employment status of workers they place with your agency. There are extra responsibilities that will affect you. For every placement of a Limited Company or Self Employed Temp Candidate the CLIENT will have to send a Status Determination Statement (SDS) to the Candidate, determining whether a contract is inside or outside of IR35 rules, copying this to the Agency, who are now responsible for deducting employment taxes if Inside IR35 rules. This will mean changing the Tax Method of the Candidate to comply.

The SDS is between the Client and the Candidate and is managed from the Person form. There is a new view for Company SDS, above the Placement view. Enter the Client Contact who has determined the status, how the Candidate is to be paid and the Reason for the decision. Copies of the SDS Documents should be kept on the Documents view. We advocate adding a new Document Type to be used.



2024/04/18 02:36

Release 2.19.11

SDS for Ralp	h Black at Advancing 365 Ltd.	×									
₩ 4 ▶	IR35 Status Determination Statement										
Person: Ltd, HMRC Engagement Details None, Balaclava Limted											
	Company: Inside IR35 Company: Allows PAYE, LTD, External PAYE, Self-Employed										
End-Client M	IUST send an SDS to the Worker and Agency within 31 days of starting.										
The SDS is b	etween the End-Client and the Worker.										
If no SDS he	is been received use Cancel and DO NOT save.										
Contact	Austin Jones Note: Save any associated										
IR35 Status	PAYE NOT Required document on the Applicant document view										
Reason	SM Test										
	Save & Close Cancel Help										

There are also changes to the Company form. In the Miscellaneous* view that holds Accounts information the field that was 'Private Sector Outside IR35 has been renamed to 'Small Private Sector Outside IR35'

In April any large Private Sector Clients will have to be ticked - start adding these clients to a Stored Selection so that they can be updated in bulk.

In addition there are tick boxes to set what payment methods the client will accept

- PAYE by the Agency
- Limited
- Limited External PAYE (HMRC letter F)
- Self Employed (if database set to allow)

Questionnaire	Accord Transfer History	Companies House		
Installation Qs	* Account Code	XMS001		
General Notes	*Accounts Contact	A Stephens		
IT Notes	Credit Limit	200000		
in notes	* Days Credit	14		
Group	Small Private Sector Outside IR35			
Miscellaneous	Allow PAYE			
	Allow Limited			
Accounts	Allow Limited External PAYE			
IT Qs	Allow Self-Employed			
	Managed by Portal			

When creating a placement or booking a shift for a Temp (who is NOT PAYE or External PAYE) there will be a popup SDS form to record the Status. If an SDS has not been received Cancel, and remind the Client that they need to send one within 31 days of the placement start date. Completing a



2024/04/18 02:36

timesheet will also check for the existence of an SDS. If one does not exist the SDS form will popup. In addition one can be manually added on the Person SDS view.

Validations will need to be added if a placement or a Timesheet is to be BLOCKED because different sectors have different requirements. Contact IQX to arrange.

*This may be renamed to something different in your Agency

Timesheet Improvements

Approve Images

If Agencies use iqxWEB for E-Timesheets and Candidates upload images of their timesheets by phone we have added a mechanism to indicate that these images need to be checked. This has to be switched on in General Maintenance. There will be a new tick box column in Tempdesk, Timesheets view for Image approved.

	jearch (Dop	and Add	Vacancy Applicant	Create	Guery	0	Court Door	ment Show
	Number	Batch + PO Ref	Paid to - Ref and Name	Temp Desk	Company	Job Title	Comment	Approved
Þ	V3242	123458	1	Leicester	Advancing 365 Ltd.	Handyman		
	V3243		1	Leicester	Coms Ltd.	Labourer		
	V3244	9982	1	Leicester	Come Ltd.	Labourer		
	V3312	12345	2 Demo Payroll co	Leicester	A & M Steguena	Ground Worker		
	¥3313	12345	2 Lake Ventures	Leicester	A & M Stephens	Ground Worker		

It is assumed that any image linked by a consultant is approved so by default is set to ticked. Any document uploaded from iqxWEB will NOT be ticked, so needs to be expanded in Document, and then marked as approved. The actual Approving of an image has to be done on the Document (when you are viewing the image).

	Rotate	Save As	Select	View Outside IQX	Print Page	Approve Image	ta i
1 1 1 1 L		side :	. i ype i	OI WOUK	1	mesneetin	umper
			Data In	put Clerk	1.1	41584	

Validations could be added to block invoicing of Timesheets where the image is not approved.

Filter Timesheets

There is a Filter box on Timesheets, visible if the screen is widened. It will match data in all of the columns.

Comp Cont									. = *
Desk Leiseter Nove	ne - Neeky Contract	 Year Needs 2110 ≤ 27 ≤ 1040 	6 1512 Sta	Pages		(00) (00)			
Vecencies Temps	per per las	many (subst.)	Deale (Query		gi no	anes Don House		Max og
Parents	Runder Baluh + PO Ref	Patrice Related Same Ter	rry Deals Payrol	Temp	Account	Donpany	349.709	Connect	Hept Approved
Transform	V020						Labourer		
THAN	V3244 9963		icester_ ancost				Labourer		
	VICKN 9963		ionaim. 0000LA				Lakeurer		
work Temps	VCDRB 9963	3 Demo Payrollico Las	films ber 0000LD	Robinson, Sandka	101	Cyme LML	Labourer		C/REARCHERTS

Image Status

In addition to the colour of the line indicating information about a linked image there is a column with a written message.

	(2) Count Document Show Hours	Filte
Image Approved	image File	Image Status
~		ОК
		ОК
	C:\IQX\IQX TSs\2019\\37\Scott Test Photo.jpg	ОК
~	C:\IQX\IQX TSs\2019\Legal Recruitment\37\1853.TIF	ОК
	B	



Image Cropping Tool

We have found that sometimes images have unnecessary content around the edges. There is now the ability to use an image cropper for tif and jpg files prior to linking images to a timesheet, see below.

💩 Crop Image Tool	_ = X
	Seve and Oose Abandon
	4 4 £ 3
TIMESHEET BLUCKboker	Click image and drag to select Resize by dragging the grow
Production (specific first and specific first transmission) Production (specific first and specific first transmission) Production (specific first specific fi	Apply Orgo Or dist. "Orlar"
Comparison of the second state of the second s	Cancel Orge Or disk "Eac"
	Unde
And and a second	Save Image
°addexayyyekhtanaddexay	• 6 8

Once you have cropped the image as required you click on apply crop to apply the changes and then click save and close, this then overwrites the original image.

You can also crop an image that has already been linked. From TempDesk you would go to the Timesheets view and click on the document button to view the image, you can then follow the same cropping steps as you would for an unlinked image. When cropping an image that has already been linked The audit trail of the candidate record will also show who has cropped the image.

Companies House Look Up

Accounts users can quickly check details of a company with Companies House without leaving IQX. Simply enter the company registration number and use the elipses button on the Company Reg No field or the new Companies House button on either the Person Payroll view or Company Miscellaneous view:

) Rep	n la	lagister Delete	Search	0.00			
Score 0%	Peb 👗 🗌	GDPR	Subse	ribed to Marketin	p mailings	Change to Un-	Subscribe		
Temp Nebry 😦	Durision Known As	Victoria Alla			thead	ire .	CRB: , Expired	×	1
	Date	Current	101	_	Alert				
Progress	CAvalable	COLLEG				Departments	Industrial (Terry	Ń.	
Pacements	Available From					Questionnaire	Industrial		
Wenholds	(TPersonal				(crony d				
	Hone Phone					Licences			
ANR						a truck			
Timeshoets	Roldey Pay	Subelde		PASILIBINE	Comp	owite Co Templel	te lifeintenance	Companies House	
Payrol	Composite Co 1	enplate							
	Suppler Code								
Payrol Address	Payrol Number								
Location Map	Start Date								
CG Cards	Untralia Comp	ery Changed							
	· Dark Details								
Temp Deaks	Pay Method		BACS						
Photo	Pay Frequency		Vietky						
Decumenta	Tax Method			y the Agency					
	HARC Engagem HARC Gandar	01.0404	None						
Compliance Decuments	Reck Panted N							P.	
	Corpany Name								
Perm	Company Reg.								
Accounts	VAT Registered								-
Compliance	WAT Number								

Release 2.19.11



2024/04/18 02:36

(() H 🔝	📑 😖 Reports	Delete	-3 3		149	1	
Lors	Division	120496789812	H9678861204	667396		Contact	
	E Name	SLive				Primary	
Consultant	CAMPRO	Wesler Seulto	ion, Lillesleaf	Beliuse.	TDB	Un Dabsories to M	
Contacts	EPhone				-	Sales Consultant	
Contact Fueria	Social Hada					Direct Phone	
Consol Evens	Account Code	537				Mobile	
8008	Invoice Address	Wesler Seulto	ion, Lillesleaf)	Befuse.	The	- Local	
AVE CONCERN	Alert D					Direct Fax	-
	20808	Clent				Job Title	
Vecencies	Sales State					Department INDIA	
Programs	Companies	found 1					
Placements	* Account Caste	_	\$37				-
WEIGHT	*Accounts Cente	et					
	Credit Linit						
Questionnaire	1 Days Credit		14				
Notes/V	Private Sector Du	daide FDS					
Extra Notes	Managed by Port	ai .					
	* Invoice Frequer	CY.	Innedat				_
Group Tree	Company Reg. To		\$017178	10			
Macelaneous	Invoice This Reco	10.1.001058					_
	Invoice Address		Vicalar I	lew hous	e, Liller	iest, Meirose TDI S/T	
Accounts	On Step						
Documents	E-Tmesheeta						

The following report will be returned an a contact event logged to show the check was completed:



VAT Number Checker

Accounts users can quickly check details of a VAT number for either a person or a company without leaving IQX. Simply enter the VAT number and use the new VAT Number button on either the Person Payroll view or Company Accounts Miscellaneous view.

	an 🖓				egister Deiete Gearch			
Score 2%	1948	4 •	10PM 94-5385	crue	EO from Marketing mailings	Change to Subsoria	ni -	
Terro	Dvisen				Headline			_
	Cilliane 5	Cost: NoMul	len.		Alert			_
Requirements 4	State #	he registrat	5on		Reg Departments	Cventa (Penn-Temp)		
CV	CAveletie				Depl. Questionnaire	Evenia		
Questionaire	Available from 2	7452919			CGeneral Skills			_
Guestionare	(Personal M	Nam 27			HCM/1948			
Tooline .	Home Phone				Grade			
202 5024	Day Phone				Speciality			
	Mobile				Chef Expey Date			
Reference		coft.memula	kn@hotneil.cs.uk 😁		Test number for dec pl			_
Haloy	Frend Final Adv			1	Type of Roldey Pay	Paid by Timesheet 12.0	1%	
Progress	Holdey Pay	966.0	rve Composite	001	Femplete Weintenance	Companies House	VAT Humber	
Paceneros	Composite Co Ten	npiete						
	Payrol Number							
WEALER	Start Date							
AVE	Passport Number							
Transference	2 Bank Delaits		Code 11.22.33					
	Email Payalpa							
Payrol	Pay Bethod		BACS					
Persilabeta	Text Payment. Adv	iee						
•	Pay Frequency		Vitekly					
Locator Map	Tax Method		MOTE by the Agency					
Perm	MADE Engagement	nt Detail	Sere					
	MARC Gandar		11 prim					
Accounts	Book Farled N							

iqx

6/10

2024/04/18 02:36

E Bave And	Close Abandan Update	Send Statement Reports New Involce Address				
Macelaneoua	Companies House	W0 Number				
Accounts	Group Timesheets on Invoice	Batch Only One invoice for each Account Code, Temp by Period, Number				
Contact Events	Invoice Management Group	Baloh				
Contents Crystella	Invoice Address	19 Albary Street, Edinburgh, Poland EH1 30N				
	VAT Number	38562636888				
	VAT Status	Standard				
	ERNion Invoice					
	Pixed N percent					
	WTR percent					
	AWR Ni percent					
	AWR WTR percent					
	PD Number Required on Invoices					
	Invoice E-mail	temp@iqs.co.uk				
	Statement E-mail					
	Override Invoice Layout					
	Invoice PDF exclude Timesheets					
	PDF must have Documents	None				
	PDF Security					
	Account Code Name	A-5 II Stephens				
	Statement Prequency	None				

The following report will be returned and a contact event logged to show the check was completed.



Reporting on Shift Prices

Functions have been written to report on the expected true value of shifts in a week in advance of timesheeting.

Run against all shifts for vacancies that have Rate Schemes and Scripts we now have the tools to create a report that will break each shift down into the different slices and paybands, calculate the pay and charge and create a cumulative total for the week.

Please contact IQX support on 01835 340 034 if you are interested in having a report written.

New 2020 Legislation Requirement

New legislation requires information to be sent at the beginning of every assignment. This can be done through Notifications. Contact IQX to discuss the ways in which this can be done.



Drag Person from Favourites

It is now possible to drag candidates from within your Favourites lists onto a vacancy shortlist. Please note if you drag a record within Favourites it copies rather than moving the record to the new location.

ENHANCEMENTS

Mailchimp Unsubscribe Improvements

Unsubscribing candidates and contacts in Mail Chimp now filters back to IQX. When a user presses the subscribe button on the Mailer Selections new records are subscribed to Mail Chimp and records that have unsubscribed in Mail Chimp are filtered back to IQX

Withhold Reasons Added

In order to provide meaningful information to clients or for your Agency you can now distinguish why someone was withheld from a particular company or vacancy by way of withhold reasons.

If set up by your Agency when adding a withhold you will be prompted to select a type and reason from two drop down menus.

If you want to edit a withhold press the Edit button and select the correct Type and Reason.

Progress	Expand New	Delete Edit	Filter Help
Company SDS	Consultant Created	Company Job Title	Our Ref Type Reason
Placements	► SCOTTM 20/12/2019 11:03	Amec Services Ltd.	Client Scott Test 2
Withholds		Ralph Black	×
AWR		Select the type	
Timesheets			
Payrol		1	1
Payrol Address		Client	12
Perm			
Accounts		Ok	ancel

Note - if you withheld from all companies in the group editing a withhold will only edit an individual company and you will need to edit each company individually.

New Dual List Box screen on Maintenance forms for Divisions/Departments

Added the ability to link to a selection of Divisions or Departments instead of just one. Useful where several Divisions or Departments work in a similar way and you do not want to set up one each individually.



CV Parse Extension

The CV parsing function has been improved and now parses more information across a variety of CV formats than it did in previous versions.

Auditing when re-filling shift

When cancelling and refilling a shift there is now a clearer audit display of what has happened; who actioned and when. This will show when the shift was entered and by who, when the shift was last filled and who filled it and also when the shift was initially filled and who filled it.

Additions to Invoice view

When viewing an invoice record if you scroll along to the end in the top section there are new columns that show Invoice Template ID (Doc Template), Transfer Batch to show when exported to Accounts and the internal DocumentID. On the journal lines below it will also show the Transfer Batch and the Analysis Batch if processed for GM reporting.

_																
any		Print		0	bere	Copy)									
of I	-	t Refred I	Decume	(Cale)	Oue Date	Expected Date	Decoment C	lass Correct	v Exchange I	late Sent	fty	Errel Batch	Pret Batch	Template D	TransferBatch Docum	eri D
			01100	19	12/12/2019		invoice				Not			Selectrypics	109009	67
														_		
a.e		Quality	Plice	Each	Goods Arrow	ALC: NY	1017 Code	107 949	Budget	Analysis Amount	Accounting Date	Ledger	Account	Transfer line	ICh Analysis Batch	+
-1	10.00	0.	80	190.00	-198	-30.0	8 00	20.00	0.80	0.00	12/11/2019			_		
	38.00	0.1	00	0.00		00 0.1	00	0.00	0.00	0.00	12/10/2018					

Person Duplicate checking refinement

Duplicate person check is now more specific with what records it returns as possible duplicates. Records with matching National Insurance numbers will always be returned. Client records will be excluded.

Broadbean - Add Candidate wizard

When adding a new candidate to IQX who has applied through Broadbean the new person screen is now a wizard for efficiency allowing you to parse the CV, answer candidate questions, add notes and register candidate to a department.

Bagetister Applicant Pagetister Applicant is a new department - Ves can populate data fields by highlighting forms and right-clicking the mouse Please highlight the department the Applicant is a new department. - Davie Day Gddrew: Day Hand Steast Steast Department Steast Applicant is a new department and press Next. - Diverse Day Gddrew: Department Counters to Machine Applicant is a new department and press Next. - Pill Nain Steast Mandheete Important is a new department and press Next. - Person Applicant is a new department and press Next. - Person Applicant is a new department and press Next. - Pill Nain Steast Mandheete - With IEE - Department Counters Next. Engletister Applicant is neared Next-Inclusify Press Next. - Department Group Counters - Department Counters Engletister Applicant is neared Next-Inclusify Next Next. - - Engletister Applicant is neared Next-Inclusify Next Next. - - Engletister Applicant is neared Next-Inclusify Next Next. - - Engletister Applicant is neared Next-Inclusify Next Next. - - Engletister Applicant is neared Next-Inclusify Next Next. - - Engletister Applicant is neared Next Next. - - Department Nex		• • • •			
Register Applicant Person population data fractis by highlighting forms and right-clicking the mouse Person highlight the department is a new department - Davis Day Address: This is about the which department is a fight-clicking the mouse Department is a new department is a department. - Davis Day Address: This is about the which department is a department is a department. - Department Current Registration - This was State Merchetter Merchetter Merchetter First about the control of the department is a new department. - Department Current Registration - PERSONAL STATEMENT Innovative. Induction: Taileried. Mechanical Engineers with proven track- leader on 20 Characterization and association of technical packages in 2015. A company department of technical packages in 2015. A company department of technical packages in 2015. A company department of technical packages and the is a solid on a solid on the depart merchetter packages in anagement. - Department Current Registration Stati Services Stati Services Stati Services Stati Services - Personal packages and the is a constration in design an adverside text packages of the product gualification procedures at the text of text adversered block appearing attem and their calculations from text balance adversered adversed adverse at the text of text packages and the product gualification procedures at the text of text adversered block appearing attem and their calculations from)24/04/18 02:36	9/10			
Via can populate data facta by highlighing farm and right-clicking the neurol Place highlight the department and press Next. Charle Day, doghese. Charle Day. Objects Department Distance Day. Carrent Registration State Sheet. Department Distance Day. Carrent Registration State Sheet. Northern	New Applicant	-	= x		
Ticks afters in which departments the Applicant a streactly registered Address: Devise Day Address: Devise Day Department Department Current Registration Current Regis	egiater Applicant	Register Applicant in a new department			
6ddesse: Folderse: May Orleviter Marine Stead Marine Stead Marine Stead Marine Stead Marine Stead FRS CNAL STATEMENT Instruction:	ce can populate data fields by highlighting terms and right-clicking the mouse				
Advanced to decide and and to be the set of the se	detect detectt detectt detectt detectt detectt detectt	Northern South West Offers Menufacting Health Construction Social Services Menung Events Legal Group 2 Legal Group 1 Legal			

Improvements to Notification Attachments

When attaching documents to notifications IQX will now look at the document type and the document name. This is helpful as it avoids documents not being picked up due to mispellings in the name. Note it will pick up any documents that match that have not been archived so if you have multiple documents of the same type or with the same name they will all be picked up.

Copy Button on Manual Invoice

New copy button on manual invoices to create a copy of the invoice but with current date.

Bulk Adding to Vacancy Shortlist

On the search wizard in a vacancy the 'Tick All' button has been changed to 'Tick' and when pressed you will see two new options; 'Tick All' the same as before and a new option for 'tick all records down to and including the selected record'. This option will look to which record the black arrow is next to and tick every record down to and including that record. This will save users repeatedly ticking each line individually.

If set up by your Agency you may also have the option to 'tick the top X number of records' on the list. This is useful if you have re-ordered the search results by proximity to the vacancy and want the 15 closest people to be added to the shortlist.





	iqx
2024/04/18 02:36	10/10
Temp Vacancy: Test for 5 Live	×
Select Type	
	~
All Tick all down to and including selec Tick top 15 records	cted record

CV Send Improvements

When a single sent cv is sent from a vacancy short list, on the client form the candidate name shows in the link. Where multiple cv's are sent, this will display the word Multiple and a count of attached cv's in the link.

Contact Type	Date	Time	Contact Summary	Link	Count
New CVs Sent	01/04/2013	17:36	CV(s) Sent	Jillian Brown	1
New CVs Sent	01/04/2013	17:20	CV(s) Sent	Multiple	4
New CVs Sent	01/04/2013	16:57	CV(s) Sent	Jillian Brown	1

New index on person.ni

We previously had a job that would check for duplicate NI Numbers. This has now been added as an index on person.ni as is a much better way for this to work.

From: https://iqxusers.co.uk/iqxhelp/ - **iqx**

Permanent link: https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.19.11&rev=1576847902

Last update: 2019/12/20 13:18



