

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.



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: Ir Company: A	iside IR35 Ilows 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



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 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		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 höv	erw 🔹 Veerly Contract	* 2119 - 21 - 21 - 21 - 21 - 21 - 21 - 21	15125219 (See	ni Paosa		(00) (00)			
Vecencies Tempe	per per la	many (synat) D	ente (awy.		gi cast cas	ment Down Hours		Max og
Parents.	Runder Baluh + PO Ref	Petition Related Name Terry	y Deals Payrol Ide.	310	Account	Dangeny	349 709	Connect	Mage Approximat
Timeshawks	 Vielo 						Labourer		
THAN	VI2NK 99K3		rester- shcotr 1				Labourer		
work Temps	VORA BED	3 Demo Payrollico Lato	inster_ 0000LA				Labourer		CIERCERT

Image Status

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

	3 Count Document Show Hours							
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							

Timesheet 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 Ocea
	4 4 A A
	Click image and drag to select Resize by dragging the grass
Per devices frequenting from the Device and the Section of the Sec	Apply Crop Or disk "Enter"
	Cancel Orea Or disk "Esc"
Part China Line T(x) ≥ T X_1 2xx T/48 Line T X_2 T X_2 2xx T/48 Line T X_2 T X_2 2xx T/48 Line T X_2 T X_2 1xx T X_2 T X_2 T X_2 T X_2	Undo
	Save Image
°	• 6 5

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

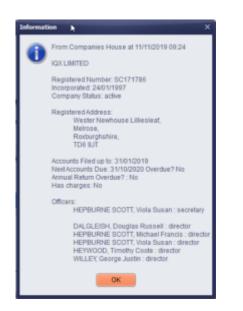
Accounts users can quickly check details of a company with Companies House without leaving IQX. Simply enter the company registration number and use the elipses button on the Company Reg No field or the new Companies House button on either the Person Payroll view or Company Miscellaneous view:

🖨 Michael Alliso	•								- 83
H 4 F H		CDPR	ris Register De Subscribed to Marke			a a			
Temp	Duraken Knowin Aa	Victori I		i Hee	dine	CRB: , B	qites:		8
Habry -	(interne	Wichael Alle	40h	Aler	1				_
Progress	State	Current		Reg	Departments	a industrial	Terrol		
Pacements	Available			Dep	t. Questionna	ite Industrial			
WEstelds	Available From			(CKay	Shife				
	CPersonal Home Phone			0.00	/ Licences				
ANR	Hone Phone			- ates	1.8 Truck		_		
Timesheets	Holdey Pay	Subelde	 PASLeave 	Com	ponite Co Ter	npiete Meintenen		Companies House	
Payral	Composite Co % Suppler Code	enplate							-
Payrol Address	Paurol Number								
Location Map	Start Date								
	Unterelle Compa	ery Changed							
CIS Cante	Ouris Details								
Temp Deaks	Pay Method		BACS						
Photo	Pay Frequency		Vietky						
	Tax Method		MVE by the Agency						
Documenta	HARE Engagem	ent Detail	None						
Compliance - Decuments	HMRC Gender							D2	
	Block Parced M								
Perm	Company Hame								
Accounts	Company Rep. 1								
Compliance	VAT Registered VAT Number								
	The summer								



6 6 P R 🔝	📑 😖 Reports	Delete	3 3		M9.	٠	
Dates -	Division	120406789810	049678961204	6617596	-	Contact	
	Ename	SLive				Primary	
Consultant	20Address	Wesler Newho	use, Lillesleaf	Betues.	TDB	Un-Subscribe to M	
Contacts	Phone				-	Sales Consultant	
Contact Fueria	Social Heda				_	Direct Phone	
	Account Code	537				Mobile	-
ANR	Invoice Address	Wesler Newho	use, Lilles/eaf	Belinse.	nei I	- Local	8
AVER CREWNS	Alert D					Direct Fax	8
	21808	Clent				Job Title	
Vecencies	Sales State					Department NEW	
Programs	Companies	found 1					
Placements	* Account Caste	_	637				-
WEIGHT	*Accounts Cente	et					
	Credit Linit						
Questionnaire	* Days Credit		14				
Notes/V	Private Sector Du	daide IFCH	1				
Entra Notes	Managed by Port	al .					
	* Invoice Frequer	CY.	Innedat				_
Group Tree	Company Reg. To		\$017178	6			100
Macelaneous	Involce This Reco	10.1.001055					_
	Invoice Address		Viesler I	iewhove:	, Lilles	ieaf, Meirose TDI SiT	8
Accounts	On Step						
Documents	E-Tmesheets						

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: NeMul	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		NYE By De Agency					
Perm	MADE Engagement	nt Detail	Sere					
	MARC Gandar		11 prim					
Accounts	Book Farled N							

iqx

6/10

2024/05/25 00:45

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	Note				
	PDF Security					
	Account Code Name	A.5 M 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	Ex	and 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 typ	e			
Timesheets								
Payrol						-		
Payrol Address			Client			12		
Perm								
Accounts			Ok		Cancel			

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	18.00	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.

Address: Northern Foldward: Sorth West Marchelder Sorth West Marchelder Drivers Ensit charledispool (A Tagehone: 077) Coccoccop Itarufacturing PERSONAL STATEMENT Bestin Prevention: Industrisus: Intervative: Industrisus: Expressing data inspectively (All inspectively with a Mechanical Engineering dages in 2015: A communicative, encounting its samplages with precerit (dass offectively and is oble to assist others) in the bleet procedure. Solider in 30 CMD modeling and ensinters, FEA and a large number of precerit (dass offectively and instanter, FEA and a large number of precerit (dass offectively and instanter, FEA and a large number of precerit (dass offectively and precessing datas)		• • • •			
Register Applicant Register Applicant is a new department - Yes can populate data fields by highlighting forms and right-clicking the near Please highlight the department and press Next. Ticks about next department and press Next. - Davids Day 643 few: 191 Main Steel Sector West - Department and press Next. Ticks about next department and press Next. - Davids Day 643 few: 191 Main Steel Sector West - Department and press Next. Ticks about next department and press Next. - Distribution of the Sector West - Department Carrent Registration - Please highlight the department and press Next. Ticks about the Sector West - Department Carrent Registration - Please highlight the department and press Next. Ticks about the Sector West - Department Carrent Registration - Please highlight the department and press Next. Tech about the Sector Next. Sector West - - - Present Next Sector Se	024/05/25 00:45	9/10			
Register Applicant Register Applicant is a new department - Yes can populate data fields by highlighting forms and right-clicking the neare Please highlight the department and press Next. Ticks about which department and press Next. - Darkin Day Address: - Department and press Next. Ticks about which department and press Next. - Darkin Day Address: - Department and press Next. Ticks about the department and press Next. - Darkin Day Address: - Department Carrent Registration - File Address: - Department Carrent Registration - File Address: - Department Carrent Registration - File Address: - Northern Seath West - Dread the RORAL STATE WENT - Construction - PersonAdv. Evolution: Texters - - - Seath West - - - - - Dream between OTA Concourse of the Address of the Add	New Applicant				
Davis Day 2 Department Current Registration 2 Markhentor 3 Nartherm 2 Nartherm Scatt Ward 3 2 Markhentor 5 Scatt Ward 2 Mit TEE Ensem 1 Telephone 077 00000002 Hartherm 1 PERSONAL STATEMENT Construction 5 Social Services 5 5 Engineering degree in 2015 A communicative, encouraging team plays reformed to social offending and lange random of belong to in the late placed dock and the langed Graup 1 Langel Graup 1	fou can populate data fields by highlighting terms and right-clicking the mouse				
KEY ACHEVENENTS Industrial Company. Recorded for Wildler and repid progress. Promoted to New Product: Engineers Industrial Company. Lecond and developed skills in oder to design an automated text sphere which performs must product qualification procedures at the toach of a bitm. Used Model Instrument's LaWriew and a data acquisition and designed bitm a presumate system and amount selection Company. Leconder of all year (Incelerint) Holes years is appeared (Data Viet Mission Instrument's Company. - ENELOYNE KIT HISTORY (J2015) Presume (Data) and any content and sharin calculations/analysis to industry-encopside financies (Data) and data is an efficient and starin calculations/analysis to industry-encopside financies (Data) and performs system, presument appear finance compared in the industry- genarios in the market (Data) and performs system, presume compared in systems and systems, checked in and gate industry engineering and quality codes/standards with at AFI BA/17D, ASHE VIII and ISO 5001 = =	Eddew: Eddew:	Department Current Registration Northern South West Ditions Manufacturing Health Construction Social Services Visiong Events Logal Group 2 Logal Group 1 Logal			

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
2024/05/25 00:45	10/10
Temp Vacancy: Test for 5 Live	×
Select Type	
l	~
All	2
Tick all down to and including se	elected record
Tick top 15 records	

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



Release 2.19.11

Last update: 2020/02/26 10:13