

# The Pinnacle of Safe and Equitable IR35 Compliance



1. Contractor, Agent and Client Register on 34square

2. Complete Assessment Questionnaire

3. If Opted For, Worker & Client Sign Right of Substitution Declaration

4. Generate Status Determination Statement (SDS)

5. Client Signs and Sends SDS to Worker and Agent

6. Worker and Fee Payer Sign to Acknowledge Receipt and then Publish

7. SDS Stored in All Parties' Document Libraries on 34square

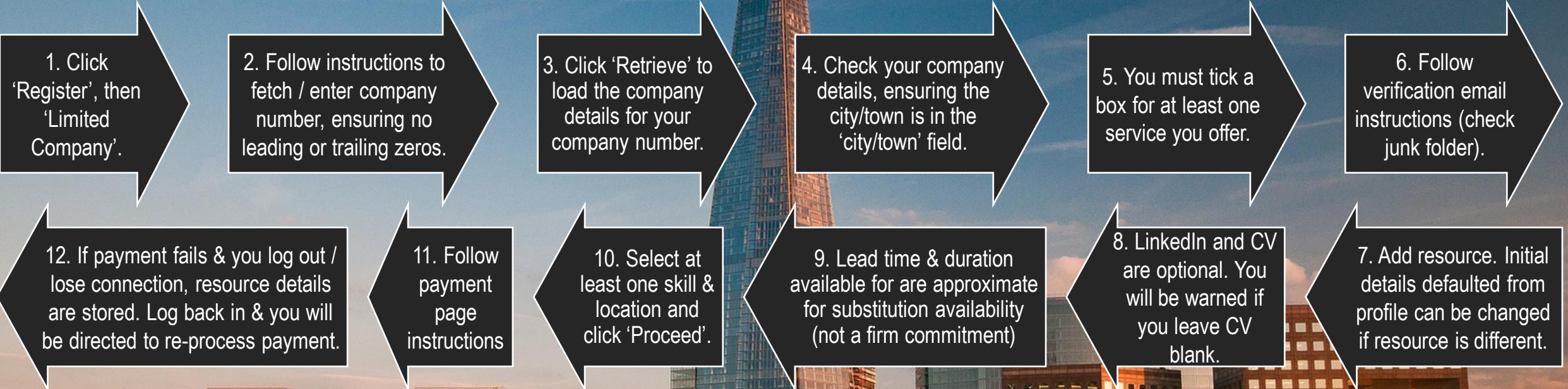
34square is helping British industry and the public sector to safely and equitably engage top freelance talent AND exceed IR35 Compliance obligations. Why succumb to an avoidable talent drain?





# 1. Contractor, Agent and Client Register on 34square

## Contractors Registering Limited Company



## Client or Agent Registration







Client, Agent or Contractor can launch. Agent or contractor can email to client to complete, or after completion for client sign & issue...

1. Navigate to IR35 Status Assessment from banner or 'IR35 Status Assessment Tool' page under 'What we Do'.

## 2. Complete Assessment Questionnaire

2b. Click 'Official Named Parties Assessment'

OR

2a. Click 'Anonymous Test Assessment'

2c. Complete header form details. If you can't find other parties in dropdowns, they aren't yet registered. Clients prompted to complete assessment. Agents & contractors prompted to complete assessment or email to client for continuation.

3. Complete the questionnaire. Help buttons display explanations. Navigate backwards and forwards and previous answer is saved. Questions rendered not applicable will be skipped. Once past question 4, you can exit and then retrieve your assessment from your Document Library and continue.

3. Complete the questionnaire as above. Once question 25 answered, you can exit or convert to Official Named Parties Assessment. The latter takes you to step 2c, reversing the step sequence.

4. Once question 25 answered, resulting landing page is driven by how questions were answered.

4b. You answered 'No' to question 5. You will have an inside or outside IR35 outcome. At this stage you can still revisit and refine your responses, Once ready, proceed to generate the Status Determination Statement (SDS) or save the draft for later. Skip next slide and go to following for instructions.

4a. You answered 'Yes' to question 5. Clients or agents are prompted to email contractor to issue Right of Substitution Declaration. Contractors are prompted to issue Right of Substitution Declaration. Proceed to next slide for Right of Substitution Declaration instructions.



### 3. If Opted For, Worker & Client Sign Right of Substitution Declaration



1. Launch following assessment completion or follow link from email sent from 34square platform (check junk if not found).

2. Upload & select your main contract. If you need to redact e.g. rates, you will need to do this before loading.

3. Complete rest of header form. If you can't find your client in the dropdown, they aren't registered yet. In 'Job Role / Signing Capacity' enter values of choosing that reflect parties' relationship to the declaration and engagement.

4. Click 'Save & Preview'.

5. Scroll down using both righthand scroll bars to select 'Edit Contract' or 'Sign this Contract'.

6. eSign contract and then scroll with both righthand scroll bars to base and click 'Send to Client'.

11. Click 'Generate SDS' and proceed to next slide for further instructions.

10. Right of Substitution emailed to both parties and stored in their Document Libraries on 34square.

9. eSign contract and then scroll with both righthand scroll bars to base and click 'Publish Contract'.

8. Use both righthand scroll bars to review and then click 'Sign this Contract'.

7. Client follows link from email. (Check junk if not found).



# End to End SDS Generation and Workflow



## 4. Generate Status Determination Statement (SDS).

Use both righthand scroll bars to review and click 'Sign this Contract'.

## 5. Client Signs & Sends SDS to Worker and Agent.

eSign contract scroll to bottom and click 'Send to Contractor' and when prompted 'Send to Fee Payer'.

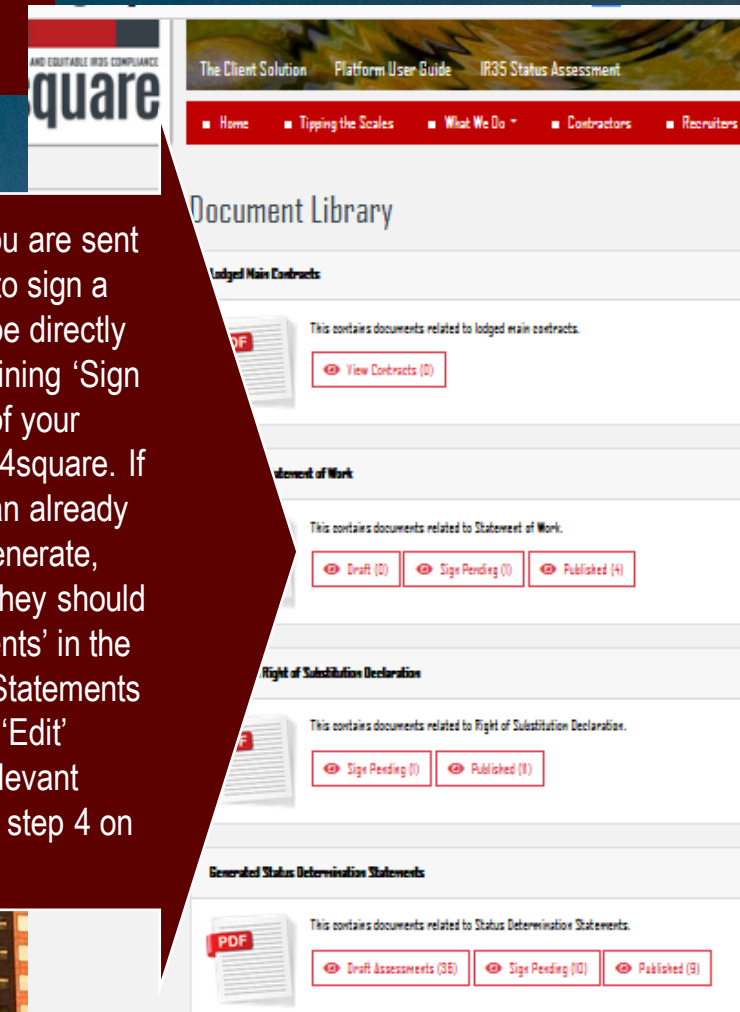
## 6. Worker & Fee Payer Sign to Acknowledge Receipt & Publish.

Use both righthand scroll bars to review and then click 'Sign to Acknowledge Received'.  
Scroll to bottom and click 'Publish Contract'

## 7. SDS Stored in All Parties' Document Libraries on 34square.

Emailed to all parties and stored in all Document Libraries.

Note that whenever you are sent an email with a link to sign a 'contract', it will also be directly accessible in the pertaining 'Sign Pending' section of your Document Library on 34square. If a client is accessing an already prepared SDS to generate, without the email link, they should go to 'Draft Assessments' in the Status Determination Statements section and click 'Edit' underneath the relevant document. Then go to step 4 on left of page.



Should worker or fee payer wish to dispute SDS outcome, they follow instructions at base of SDS.