

# Preparing for IR35 Reforms

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Sample Project Plan for  
our Agency Partners

## Introduction

**Whilst reforms to IR35 legislation in the private sector have been on the cards for some time, there have been numerous delays. As a result, recruitment agencies are at different stages in their preparations. No matter where you fall on the scale of prepared to unprepared, or concerned to confident, the only way to guarantee you have truly done all you can to prepare for the off-payroll reforms is by ensuring you've implemented a thorough plan.**

Here, we help you assess your preparedness by providing an outline plan which highlights the key areas to address. This approach helped us to work in collaboration with our agency partners when similar rules were introduced into the public sector in 2017 and we hope they will be helpful to you too.

Even if your agency is prepared for the reforms, checking your actions against this plan could help you identify any steps you may have missed and give you time to solve any problems now – before the reforms are implemented.

This approach will take you from the initial planning phase, including information about assigning a project lead and starting conversations with your end hirers, through to the second phase – implementation. This includes conducting individual assessments through to ensuring consistent and clear communication throughout the workforce supply chain.

Finally, we provide some further information on steps to take post-April 2021, including continuing to reassess roles and contractors through the final phase: ongoing support.

“Following a comprehensive plan which can be easily tracked and monitored, will ensure your entire contingent workforce is operating compliantly in time for April 2021. Plus, it will help you to maintain a competitive advantage and use IR35 as a business opportunity to build stronger relationships with your end hirers and retain valuable and talented contractors.”

**- Chris James,**

*Director of Accountancy Services at JSA and Chairman of the FCSA.*

## Phase 1: It's all in the plan

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### Get informed

Read our online guides or contact us to learn about IR35; understand how you'll be impacted, how you can mitigate risk - and even how you can use the reforms to create competitive advantage.



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### Conduct a sample assessment

Use our comprehensive assessment tool to audit a sample of your contractors, giving you clarity on their IR35 status and helping you decide your next steps.



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### Assign a project lead

Appoint a project manager within your agency to spearhead IR35 preparations and ensure continuous momentum, clarity, and efficient communication.



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### Collaborate & strategise

We'll help you have informed conversations with your end hirers to decide how you can work together to develop an action plan that's transparent, straight forward, and appropriate for your specific circumstances.

## Phase 2: Seamless implementation

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### Individual Assessments

5 Conduct individual assessments on every contractor and their existing assignments. We'll help you generate compliant Status Determination Statements, detailing the assessment outcome, and help your agency (and other parties in the supply chain) to pass on the results correctly in compliance with the rules.



### Communicate with contractors

6 For contractors with 'inside' determinations, it's important to ensure they understand how they will be impacted. Our experts can help you communicate effectively by providing information, delivering detailed pay illustrations, and hosting webinars/Q&A sessions so that contractors get their questions answered.



### Migrate contractors to Umbrella

7 Migration of contractors needs to be handled correctly and efficiently. We have experience in managing the migration of large volumes of contractors so can ensure they have a smooth transition and feel positive about their new working option. We can also help your consultants by providing tailored reporting to your requirements throughout the transition.

“It’s important you continue to have clear and regular communication with all parties in the supply chain to make sure they are operating compliantly. This is because, if one party in the supply chain is not compliant, the other parties could be found liable if they do not do their due diligence. Making sure you do comprehensive checks and have clear communication with your end hirers is one way to decrease your risk of financial liability and non-compliance”

– Chris James,

Director of Accountancy Services at JSA and Chairman of the FCSA.

## Phase 3: Ongoing Support

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### 8 Role assessments

As new contracts develop, use our assessment tool to conduct role assessments to ensure you place a compliant contractor. You can emphasise when a role is 'outside' to ensure you're recruiting the best talent.



### 9 Regular re-assessments

As contracts evolve, 'outside' contractors may find their assignment or working practices change, classifying them as 'inside' IR35. We'll help you monitor contractors and conduct re-assessments for total compliance.



### 10 Your payroll partner

As your long-term partner, we'll assist you with all aspects of contractor accountancy including JSA Umbrella, PEO, and Limited Company accountancy. So, you can focus on your core activities.

“Not only were the JSA team highly knowledgeable, but they were also great at communicating the complexity of IR35 and helping us to understand how the legislation relates to our business and our specific circumstances. It makes a big difference on a project like this, to work with people you respect, but who are also very likeable and generous with their time and knowledge.”

– **Crystal Metcalfe,**  
Vice President of RGP

# IR35 COMPLETE

## How We Can Help

We're here to help contractors, agencies, and end hirers to comply with IR35 and prepare for the reforms. IR35 Complete from JSA leverages our in-depth expertise, our specially designed assessment tool and our range of contractor payment options to ensure compliance throughout the contingent workforce supply chain.

Our experts have in-depth knowledge and experience in the roll-out of IR35 reforms, offering support and guidance when they were implemented in the public sector in 2017. As a result, we've developed a range of support solutions for our agency partners.

### Ongoing advice & consultancy from compliance experts

We have been operating specialist services for agencies and contractors for over 30 years. We have been an accredited member of the FCSA since 2011, where our Director of Accountancy, Chris James, holds the position of Chairman. As a result, our dedication to compliance and our understanding of the IR35 regulations is unparalleled in the market. As your long-term payroll partner, we'll always be available to provide compliant advice and guidance to your agency throughout the implementation of IR35 and beyond.

### A range of working options for contractors

Our IR35 Complete service is about more than just assessments. We support over 15,000 contractors to work via the most appropriate working option for them. To help you manage your entire supply chain with ease, we offer a range of options including PSC accountancy, JSA Umbrella, Outsourced Employment, and our toggle PSC/Umbrella solution. We can even help you advise your contractors on which option(s) will be best for them and help them through our smooth onboarding process, which takes just a few minutes. You can retain a talented flexible workforce despite the complexities and challenges of IR35.

### Fastest IR35 assessments available with insurable results

Our market-leading in-house assessment tool is designed to give you complete control and transparency throughout the supply chain with the ability to manage the engagement of contractors from status determination to payroll provider. With our tool, your agency has the ability to assess roles before the worker is sourced, once they're placed, and for multiple workers on the same role. Its speed is unrivalled and is built with the input of insurers to guarantee that any 'outside' determinations are fully insurable.

### Training & implementation support

We have an internal IR35 project team that will take ownership of the implementation of the assessment tool in your agency - working with you to agree on the branding, workflow requirements, and various other touchpoints. You will always have a point of contact within JSA who will liaise with you, your consultants, and clients, providing you with training on the assessment tool and support for any questions and complexities. We're dedicated to ensuring your agency gets the IR35 reforms right, first time - so our team of experts will be available to contact from Monday to Saturday to provide support to your agency and your contractors whenever you need it.

# IR35 Complete will help you:

- Gain a **Competitive advantage** by providing a simple and efficient solution for your customers in your company's branding - helping to ensure you win and retain business
- **Retain talent** through an early and comprehensive assessment process that gives you time to liaise with your clients on any necessary changes to contract terms or working practices ahead of the reforms
- **Plug resource gaps** quickly and effectively using a combination of role and contractor assessments to ensure you're placing the best candidate in every role
- **Reduce risk** for your entire supply chain with insurable assessment results
- **Demonstrate expertise on IR35** through JSA's unrivalled compliance knowledge and assistance with client meetings and client/candidate communications.

## Benefits

- ✓ **Fair decisions** - get more contractors fairly and correctly assessed vs CEST
- ✓ **Speed** - our tool is the fastest on the market and simple to use. Just a few questions will produce an instant SDS.
- ✓ **Role-based testing** - allows for assessment before the worker is sourced and for multiple workers on the same role to be assigned the same assessment/
- ✓ **Decisive** - provides a firm, binary judgement in all cases with no waiting around for manual review.
- ✓ **Automated workflow** - reduce time chasing SDSs
- ✓ **Insurable outcomes** - protect yourself against financial liability with the option to insure any 'outside' IR35 determinations.
- ✓ **Compliant** - meets HMRC standards for valid SDS and complies with established case law
- ✓ **Complete supply chain management** - provides transparent and prompt communication across all parties in the supply chain.
- ✓ **Branded** - our tool can be white labelled to take your hirers and workers on a branded journey
- ✓ **Powerful** - our tool can manage unlimited volumes of contractors simultaneously with completely automated processes
- ✓ **Cost-effective** - we have a great commercial proposition
- ✓ **Integrated** - integrate our tool into your CRM and see all your SDSs in one place

Call us on 01923 257257 to arrange an introduction with your agency.



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