Accentra Primo Umbrella
March 2020 Release Notes v1.0.7384

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Accentra Technologies Limited
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1   ENHANCEMENTS

1.1   KEY INFORMATION DOCUMENTS

Regulation 13A of the Conduct of Employment Agencies and Employment Businesses Regulations 2003 (the 'Conduct Regulations'), introduces a requirement to provide a Key Information Document (KID) for agency workers. It may also prove useful for hirers, intermediary or umbrella companies in the recruitment supply chain and agency workers themselves.

This new regulation will take effect from 6 April 2020*. From this date, all agency workers must be given a KID before agreeing terms with an employment business. In practice this will mean that the KID will be one of the first things they receive. The regulation does not apply to agency workers with existing terms with an employment business, but they will be entitled to a KID when they sign up with a new employment business.*

We've made updates to our Advanced Pay Calculator which will allow you to create Pay Illustrations and KIDs to send to the contractors you pay. We've also added KID templates to the system which you can view and edit by going to Settings -> Email & SMS -> Email Templates and searching for Key Information Document in the description column.

- Go to Tools -> Advanced Pay Calculator
- Select the payment model; either PAYE or Self Employed
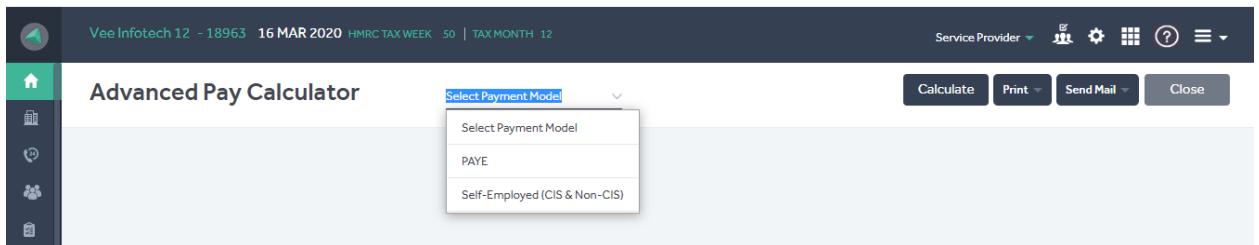
- If PAYE, select the PAYE method; either Umbrella or PAYE Plus
- Select or input the contractor details and select the relevant KID template from the dropdown
- Complete all of the payment information fields
- Click Calculate to display the pay illustration
- Choose to send the Pay Illustration or KID from the Send Mail button
- Save a PDF of either the Pay Illustration or KID from the Print
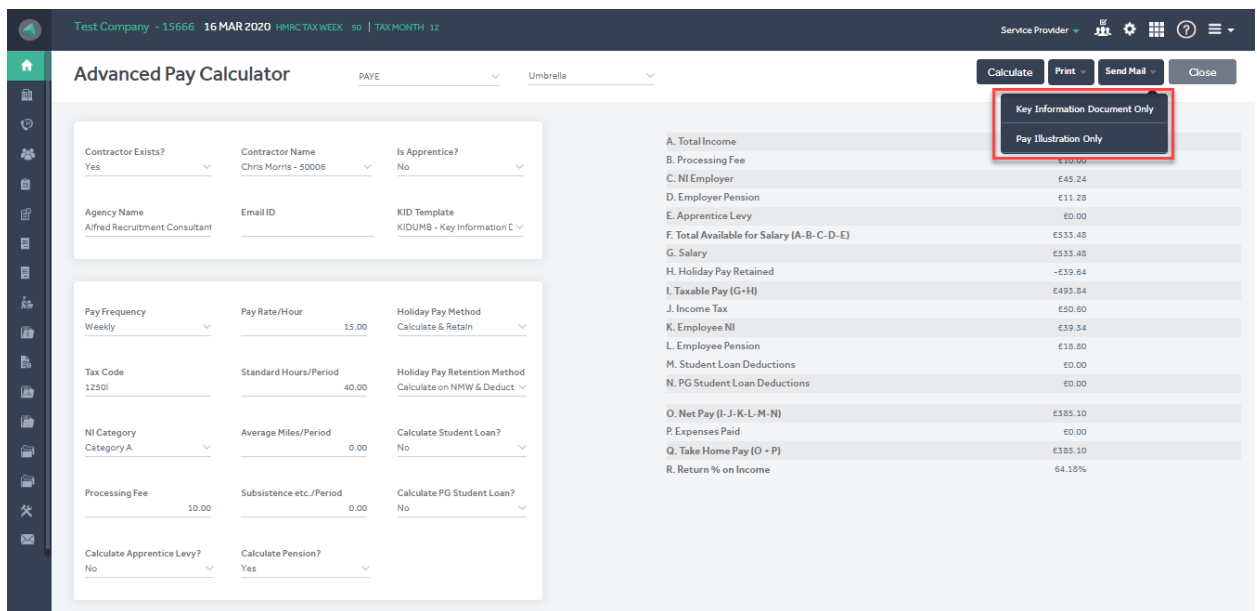
1.2   JOINT EMPLOYMENT MODEL – REVERSING ADDITIONAL INVOICES

If you're using the Joint Employment Model (two-stage invoicing method), you'll now be able to reverse additional invoices you have generated. You can do so by clicking the orange 'Credit This' arrow next to the invoice you wish to reverse. Once reversed, the associated P11 entry will appear in the 'Generate Additional Invoices' section as outstanding.

1.3   HMRC GATEWAY PASSWORD RULES

HMRC are changing their password rules from April 2020. This will only affect new users, or those who need to change or reset their password. You can continue to use your existing password if none of those cases apply to you.

The new password rules are;

• Minimum length 10 characters

• Maximum length 128 characters

• Contain ANY UTF-8 character

• Case Sensitive

1.4   SMS Test Message

We've added the option to send out a test SMS from Primo Umbrella, so you can check that messages sent via the system are successful. You can find this in **Settings -> Email & SMS -> SMS Settings**

1.5   Contractor Record – Send SMS

You're now able to send an SMS to an individual contractor, directly from their record.

1.6   Employee Import File

We've added the following new columns to the employee bulk import file:

- Job description
- Right to work status
- Visa expiry date
- Sales staff
- Customer service staff
- Agency consultant

1.7 DOCUMENT EXPIRY WARNING MESSAGES

A pop-up warning message will show if you try to add a new timesheet or expense claim for a contractor whose Visa has expired.
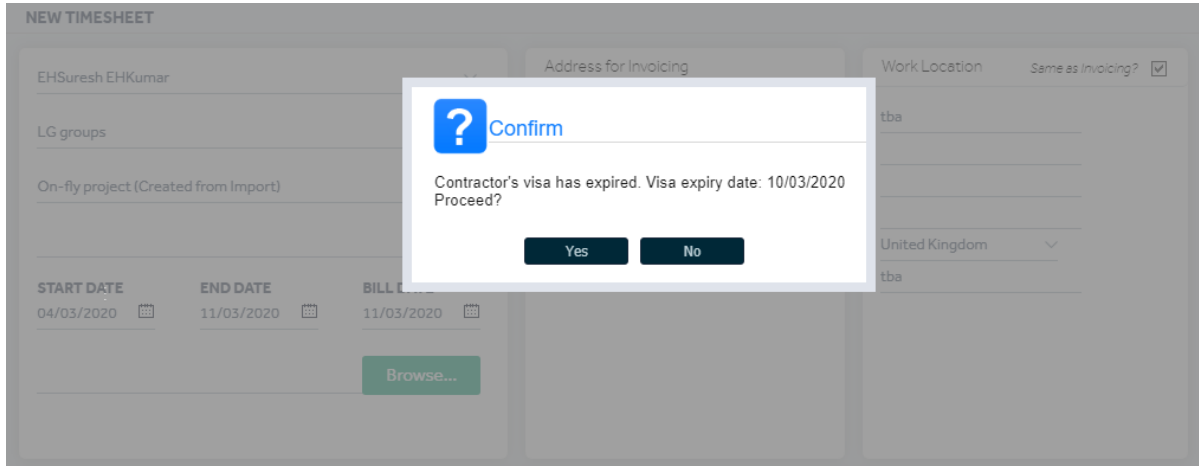
If a contractor with an expired Visa is included in a timesheet or expense bulk import, their data will be imported but a warning will show in the message column on the import screen.
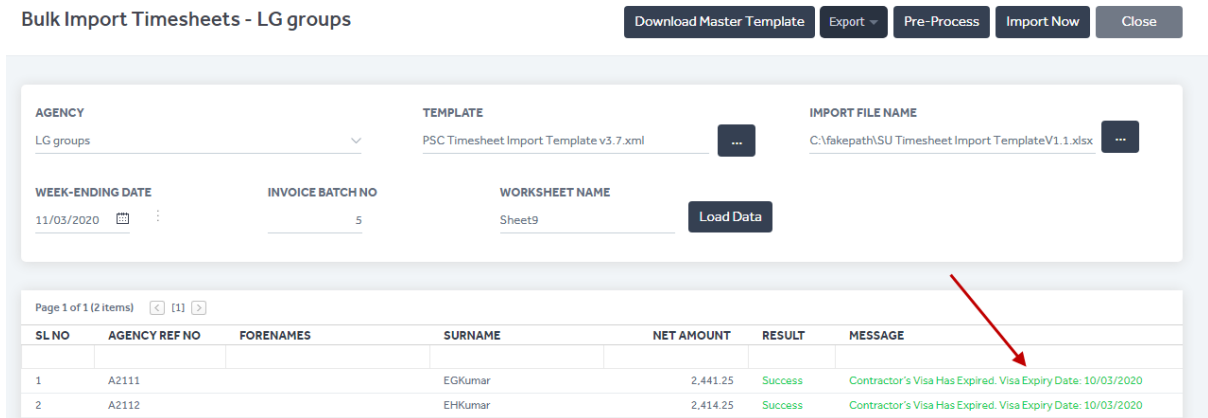
An icon will appear next to the contractor's name in their record if their Visa has expired. Hovering over this will reveal the full notification.
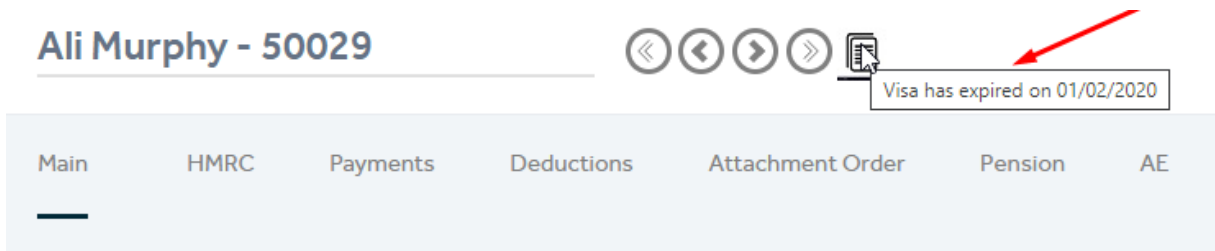
Note: As there have been few design changes on the portal, please press (Ctrl + Shift + R) to update your cache to the latest version when you login to the portal if you're experiencing continuous loading/freezing issues.

SUPPORT

We welcome any suggestions for improvements to the software. Please send an email to the below mentioned email address if you have any feedback or suggestions.

If you are experiencing any issues with the software please email the support team at support@accentra.co.uk before you call. This will generate a support ticket and allow our team to respond promptly. Please include your Payroll company ID and contact details in the email.

Primo Umbrella Support Team

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