

# IR35 Onboarding Checklist

This checklist is for informational purposes only and should not be taken as professional tax advice. It's always recommended to consult with a qualified professional for complex situations.

## CHECKLIST

### BEFORE PLACEMENT

☐

Full name

☐

Contact Details

☐

Limited Co Registration details

☐

Online IR35 checks (Links below)

### Documentations

☐

IR35 assessment results

☐

Maintain Signed Contracts

☐

Save Communication Records

☐

Document Changes (Optional)

### Contract Review

☐

Control (hours, location, method) (Less control suggests Outside IR35)

☐

Substitution rights (Right to substitute suggests Outside IR35)

☐

Financial risk (vs. guaranteed payment) (Financial risk suggests Outside IR35)

☐

Project commitment (duration, termination) (Less ongoing commitment suggests Outside IR35)

### Utility Checklist:

☐

IR35 assessment results

☐

Maintain Signed Contracts

☐

Save Communication Records

☐

Document Changes (Optional)

## Links:

- Link to GOV.UK IR35 Checker: [Notes/Reminders:](#)
- Link to ContractorCalculator IR35 Test: [Notes/Reminders:](#) (Private company tool)

Note: The HMRC Employment Status Tool is being phased out, but the link is included for informational purposes only.