R&D PARTNERS
Part of Acacium Group

Contract Management Portal

Contractor Guide

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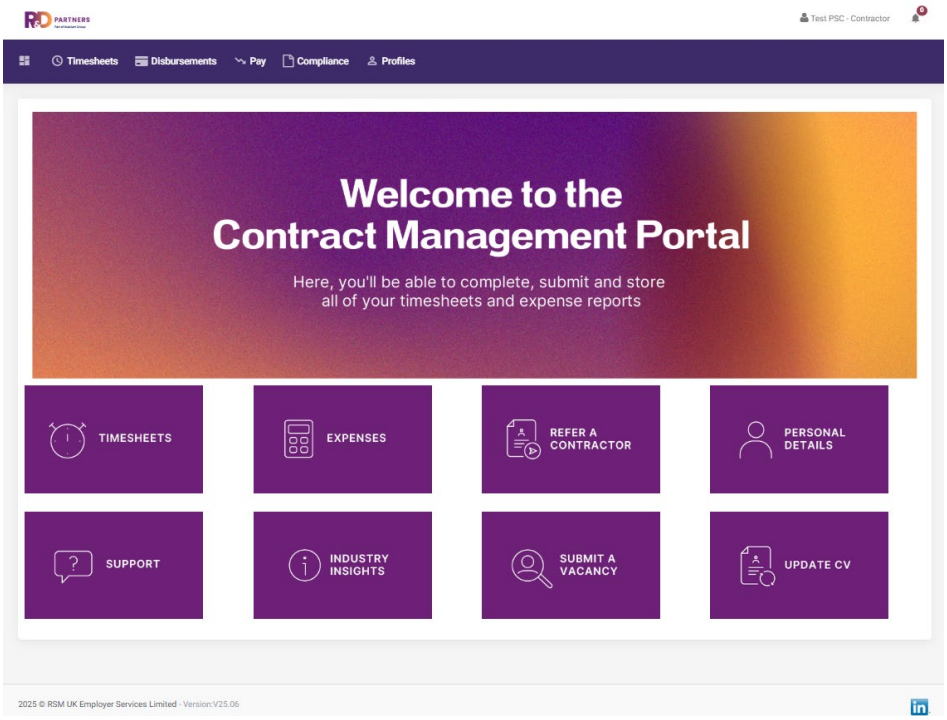
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Introduction to the R&D Partners Contract Management Portal

For the duration of your Assignment, you can use the R&D Partners Contract Management Portal to:

- Submit your **Timesheets** for approval
- Submit your **Expenses** for approval
- Amend your **Personal Details**
- Access **Industry Insights**, **Vacancies** or **Update your CV**
- Submit friends to our **Refer a Contractor Scheme**



Logging onto the R&D Partners Contract Management Portal

We will register your details for the R&D Partners Contract Management Portal when you start your Assignment. You will receive a welcome email containing your username and a separate email containing your temporary password.

Once the email has been received, you will need to click on **Login Here** which will direct you to the portal. Please save for future reference: **www.r-dpartners.com/timesheet**

The portal will notify you that your password has expired and you will need to enter the temporary password you received via email and create a new one.

- Your password **must** be between 8 and 50 characters long and contain at least three of the following:
  - Numbers
  - Upper case letters
  - Lower case letters
  - Symbols
- The password **must not** contain:
  - Spaces
  - Alphabetical sequences
  - Numerical sequences of length 3
  - QWERTY keyboard sequences
  - Four repeated characters
  - Accented letters e.g. á é
  - The following characters: £¬€<>

Timesheet Management

Timesheets need to be entered onto the R&D Partners Contract Management Portal for the client's approval.

The standard process is to submit timesheets via online authorisation. A notification email is sent to the client authorising manager and they can approve via email or login to the R&D Partners Contract Management Portal to approve your hours.

If the client manager is unable to access the system, you can also download a PDF copy of your timesheet to be signed manually and send back to R&D Partners.

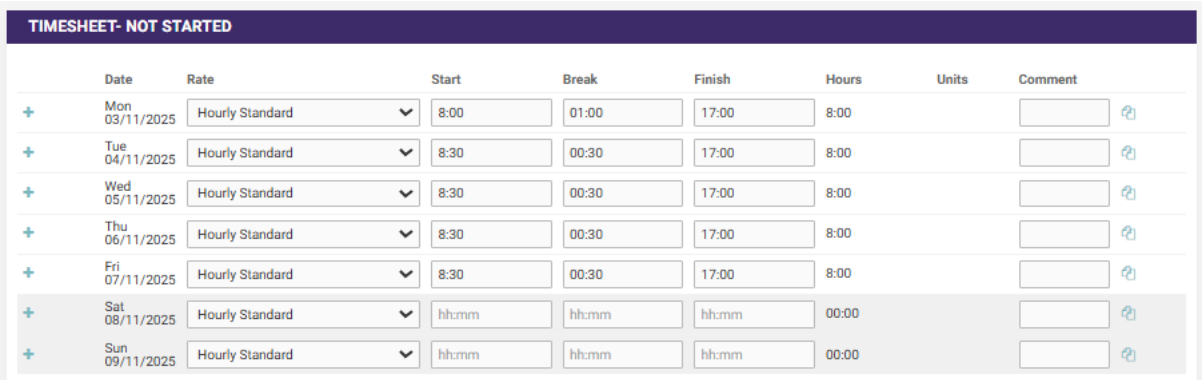
Creating Your Timesheet:



- Click on the **Timesheets** icon
- In **Placement**, click the drop-down arrow and select your assignment
- In **Timesheet Period**, click the box and select a date on the calendar; your timesheet will then appear on the screen below
- Click the drop-down arrow and select the applicable **Rate Type**

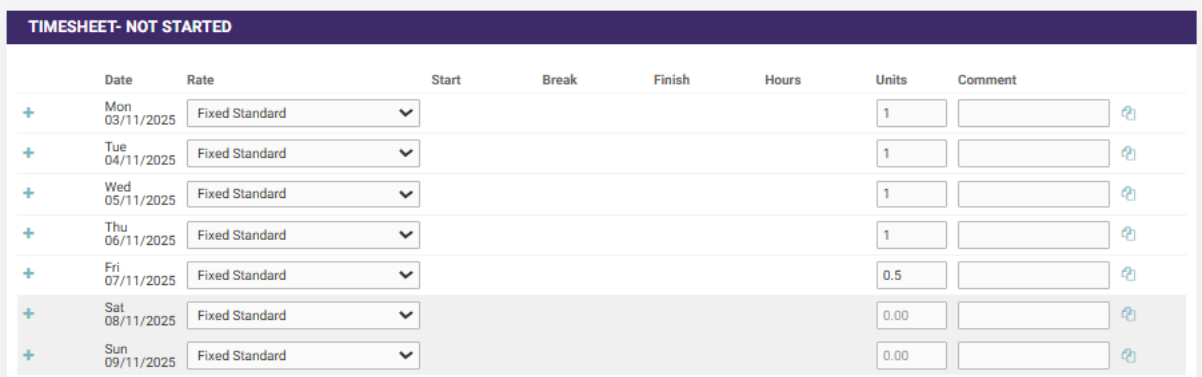
Hourly Rates:

- Enter the **Start** and **Finish** time using the 24-hour clock
- Enter time taken for breaks in the **Break** section as hh:mm e.g., for a thirty-minute break enter 00:30



Daily Rates:

- Enter 1 for a full day of services
- Enter 0.5 for half a day of services



Submitting Your Timesheet for Approval:

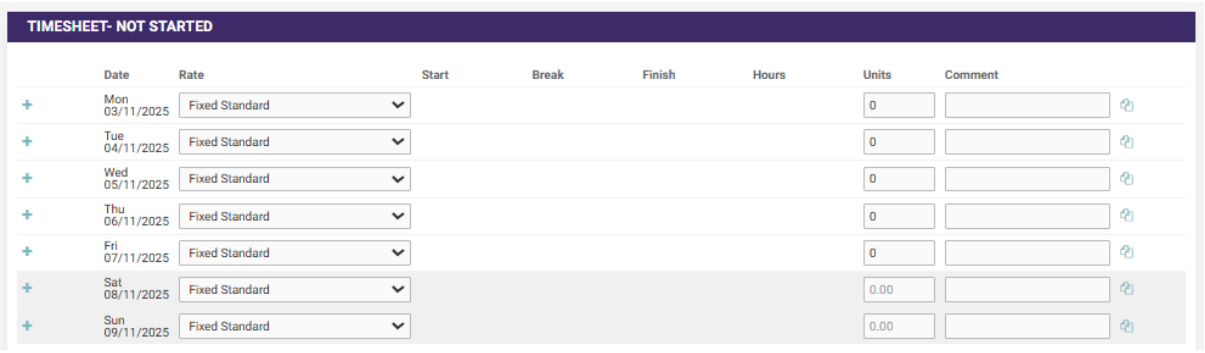
- Check your timesheet is correct
- Select an **Approver** from the drop-down arrow
- Select **Save and Submit**
- Your manager will receive an automated email from the system asking them to approve



Submitting a Zero-hour timesheet:

If you are do not provide services for a week, you must confirm this by submitting a zero-hour timesheet.

- Select your current placement and the relevant period ending date
- If you are on an hourly rate, you will need to enter the start, break and finish time as '0'
- If you are on a daily rate, you will need to enter '0' in the unit's column
- Click **Save and Submit**



Checking Your Timesheet's Status:

- At the top of the home page, select the timesheets tab
- On the drop-down menu, you have the option to select **Drafts**, **Unauthorised**, **Approved**, and **Rejected** timesheets
- If you select one of these, for example Unauthorised, it will take you to a list of timesheets in the Unauthorised status

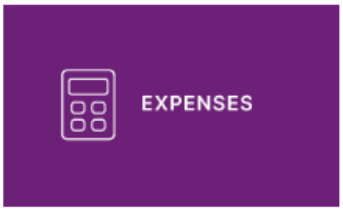
Resubmitting a Rejected Timesheet:

- If your timesheet has been rejected, you will be notified by an automated email
- The timesheet will automatically revert to a **Draft** status and will appear under the **Timesheets** tab
- Select the blue **Timesheet ID** to open the draft timesheet and make the required changes
- Once amended, you can resubmit by clicking **Save and Submit**

Expense Management

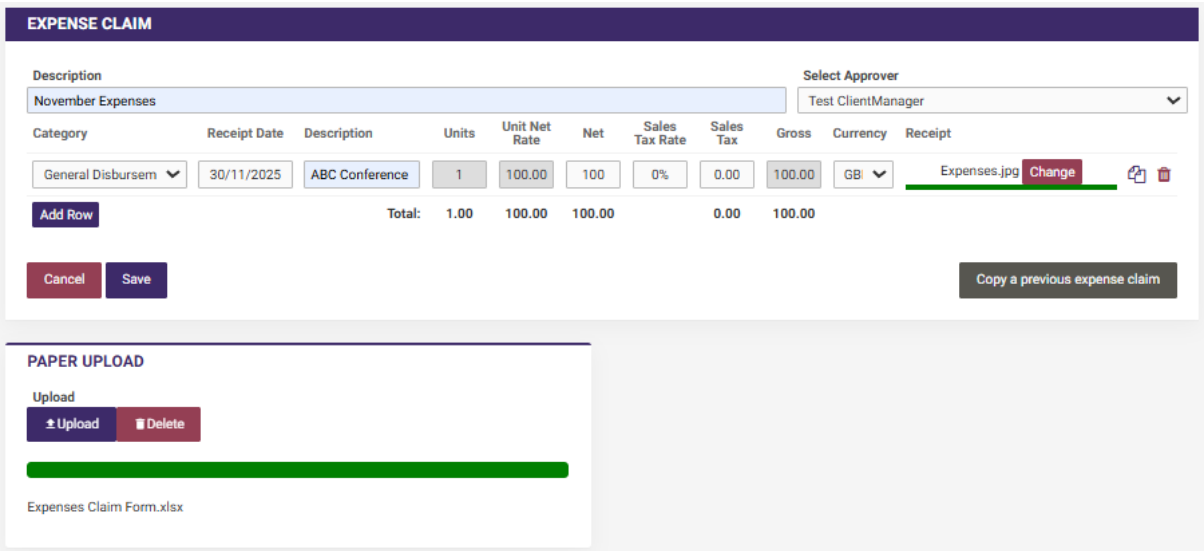
You will be sent an expense claim form at the start of your assignment. To make an expense claim, complete to form and upload with the supporting receipts onto the R&D Partners Contract Management Portal for the client authorising manager to approve.

Submitting an Expense Claim:



- Complete the R&D Partners Expense Claim form
- If you have receipts in currencies other than your contracted currency, please apply the exchange rate on your Expense Claim form and include the exchange rate used in the description
- Click on the **Expenses** icon
- Click the drop-down arrow and select your current placement
- Under **Period**, select the week ending date of the month you need to submit; your expenses will then appear on the screen below
- Enter a **Description** for your expense claim (e.g. November Expenses)
- Select an **Approver** from the drop-down arrow
- Under **Category**, select General Disbursements
- In **Receipt Date**, enter the period ending date
- Enter a Description (e.g. November Expenses)
- Enter the total claim value in the **Net** section. This is the amount reimbursed to you.
  If you are engaged with R&D Partners directly via a VAT-registered company, VAT will be added to your Self-Billing invoice
- Do not amend the **Currency** section
- Under **Receipt**, click upload to attach the related receipts
  Please note: all receipts must be combined into one PDF document
- If claiming Mileage only, under **Receipt** click upload to attach the R&D Partners Expense Claim form (receipts are not applicable)
- If receipts are attached, upload the R&D Partners Expense Claim form under **Paper Upload**
- Select **Save** to save the claim as a draft
- Select **Submit** to send to your manager for approval

The client's authorising manager will receive an email notification to approve your expense. You will also receive an email notification advising whether your expenses have been approved or rejected.



Checking the Status of your Expense Claim

- At the top of the home page, select the **Disbursements** tab
- On the drop-down menu, you have the option to select **Drafts**, **Unauthorised**, **Approved** or **Rejected**
- If you select one of these, for example unauthorised, it will take you to a list of expense claims in the Unauthorised status

Resubmitting a Rejected Expense Item

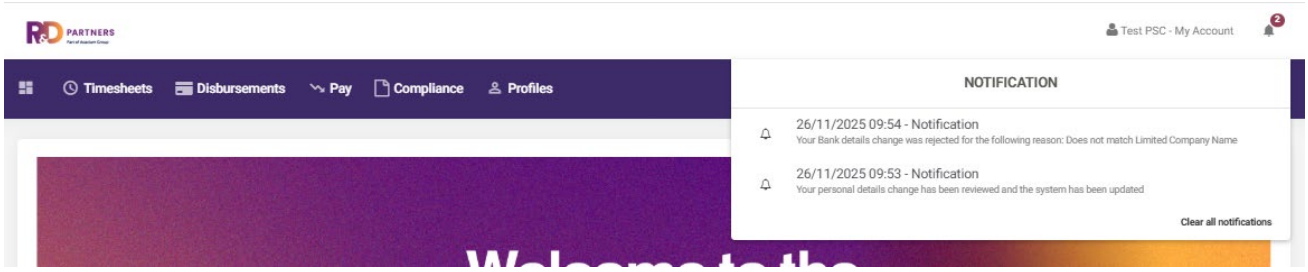
- If your expense claim has been rejected, you will be notified by an automated email
- The expense claim will automatically revert to a **Draft** status and will appear under the **Disbursements** tab
- Select the blue **Expense ID** to open the draft expense claim where you can click **Edit** to make changes
- Once amended, you can resubmit by clicking **Save** and **Submit**

Amending Personal Details

The R&D Partners Contract Management Portal enables you to quickly and easily amend your personal details:



- Select the **Personal Details** icon
- You have the option to edit your:
  - Email
  - Phone Numbers
  - Time Zone
  - Address
  - Gender
  - Date of birth
  - National Insurance Number
- The personal details screen will be locked until the changes have been approved by R&D Partners
- Click **View Bank Details** to edit your Bank Details
- The Bank Details screen will be locked until the changes have been approved or Reject by R&D Partners
- You will receive a **Notification** in the top right corner to confirm the approval or rejection of the requests



Invoice Management

If you are engaged with R&D Partners directly via a Personal Services Company, you will be emailed copies of the Self- Bill Invoices. You will also have access to view your and download all invoices on the R&D Partners Contract Management Portal.

Viewing Your Invoices:

- At the top of the home page, select the **Pay** tab
- On the drop-down menu, you have the option to select **List Invoices** or **List Credit Notes**
- If you select one of these and click **Search**, it will take you to a list of all invoices
- Select the blue **Invoice Number** to open the Invoice

Downloading Your Invoices:

- You can download PDFs of the invoices individually by opening the invoices and clicking **Download**
- You can also download a group of invoices by ticking the **Select** boxes and clicking **Download as Zip**

Running an Invoice Report:

- You can run a CSV report which lists all timesheets and expenses and their corresponding invoice number
- Tick the **Select** boxes and click **Download Schedule**

Viewing Your Remittances:

- You can review Remittances by clicking the blue **Date** in the Paid column
- You can download PDFs of the remittances by opening them and clicking **Download**
- You can also view the Invoices clicking the blue **Invoice Number** on the remittance

