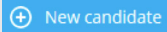


# How to create a candidate profile

## 1. On your home page select 'New Candidate'



**Note:** All information on the candidate profile page must be entered correctly with no gaps as Retinue require this information for HMRC reporting

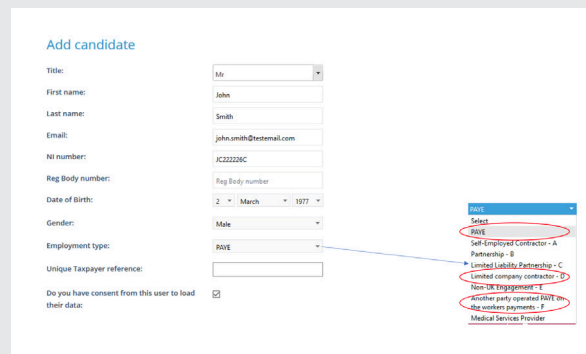
## 2. Complete candidate information including:

- Title
- First name
- Last name
- Email address

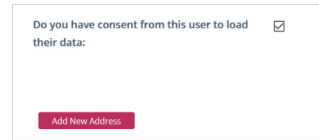
**Note:** the system will use this email address to send notifications to the candidate including progress on timesheets they have submitted

- NI number
- Date of birth
- Gender
- Employment type

**Note:** Please ensure you select the correct payment type for the candidate. If the candidate is paid as a PAYE candidate select PAYE. If the candidate is paid as a limited company select option D or if the candidate is getting paid through an umbrella company select option F

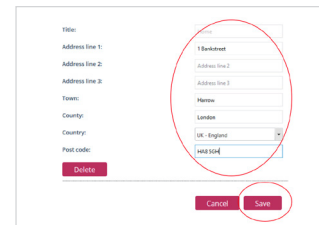


## 3. Tick box you have consent to create the user a profile then select 'Add New Address'



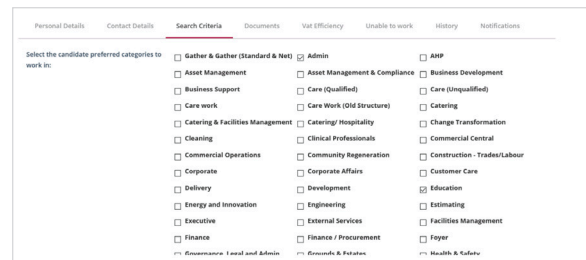
## 4. Enter the candidate's address

## 5. Once completed select save



**Note:** When the candidate profile has been created the candidate will receive an email notification and a link to setup their password to logon to the Retinue system

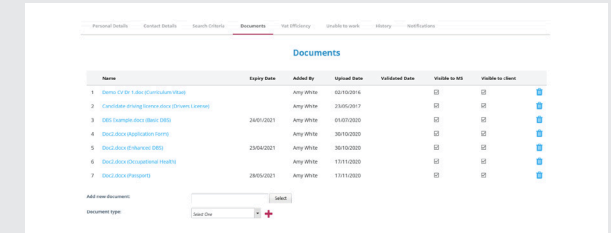
## 6. Select the search criteria tab to select the types of roles that the candidate is suitable for from the options presented on the tab



**Note:** When the candidate profile has been created the candidate will receive an email notification and a link to setup their password to logon to the Retinue system

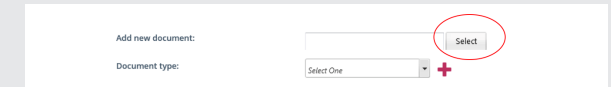
## 7. Select 'Save' the save these settings

## 8. Under the documents tab you must load the required compliance documents



Name	Expiry Date	Added By	Upload Date	Validated Date	Visible to Me	Visible to Client
1. Basic DBS (Standard & Next)	Any White	Any White	03/10/2016		<input type="checkbox"/>	<input type="checkbox"/>
2. Candidate Among Documents (Open Limited)	Any White	Any White	23/05/2017		<input type="checkbox"/>	<input type="checkbox"/>
3. Self-Employed Contractor (Open Limited)	24/05/2021	Any White	03/03/2020		<input type="checkbox"/>	<input type="checkbox"/>
4. Self-Employed Contractor (Open Limited)	Any White	Any White	30/10/2020		<input type="checkbox"/>	<input type="checkbox"/>
5. Self-Employed Contractor (Open Limited)	23/04/2021	Any White	30/10/2020		<input type="checkbox"/>	<input type="checkbox"/>
6. Self-Employed Contractor (Open Limited)	Any White	Any White	11/11/2020		<input type="checkbox"/>	<input type="checkbox"/>
7. Self-Employed Contractor (Open Limited)	28/05/2021	Any White	11/11/2020		<input type="checkbox"/>	<input type="checkbox"/>

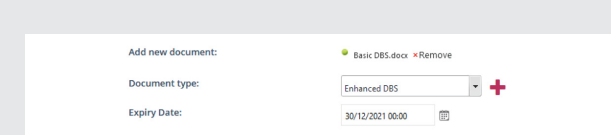
## 9. Select the select button to access your drive and select the document you want to load



## 10. From the document type drop down select the document type you are loading

## 11. If required enter the expiry date of the document by selecting the calendar icon

## 12. If required enter the expiry date of the document by selecting the calendar icon



**Note:** The system provides a full audit trail of compliance documents added including the attached expiry date, the user who added the document and the date the document was attached

**Note:** The system will highlight which compliance documents are due to reach the set expiry date. You can review these documents by selecting 'Candidates with documents that will expire soon'

