

Do you supply/have a process to supply the agency with a Key Information Document (KID)?

Documentation required: Provide your policy or an overview of the process you follow to support with the above including a sample KID document

Upload your answer to this question.

Sending Key Information Documents

Atom receives the assignment details from the agency usually via e-mail in the following format in line with the assignment schedule which we provide to the contractor:

Name of the candidate: Xxxx

Email address: [Xxxx](#)

Phone number: Xxxx

Position or nature of work: Xxxx

Previously worked for hirer: Xxxx

Pay rate(s): Xxxx

Assignment Start Date: Xxxx

Assignment Finish Date: TBC/Ongoing/end date

Assignment Days and Hours of work: eg: Monday – Thursday 8:00am – 3:30pm Friday 8:00am-12:30pm

Assignment Place of work: Xxxx

Populate MDA creating illustration for contractor which is sent by email with initial welcome email.

ATOM FREELANCE LTD CRM

Edit Illustration

Remember Settings

Contact Name* test test

New Business Administrator* Phil McGivern

Business Name Select Business Name

Pay Date* 06/04/2025

Tax Year* 25/26

Tax Code* 1257L

NI Code* A

Student Loan* Not Applicable

Post Graduate Loan* Not Applicable

Earnings

Payment Frequency* Weekly

Daily or Hourly*	Units*	Rate*	NMW Hours*	Action
	1.00	150.00	10.00	

Accrued Holiday Pay

Annual Leave Entitled 28.00

S/E - PAYE

Pension

Private Pension

Pension AVC

Apprenticeship Levy

Margin* 20.00 £

Contractor signs starter pack/sign up form and assignment schedule forms.

Atom sends Key Information Document to agency prior to the contractor/employee starting their role.

Two versions of the KID are to be created and saved. One is to include Pensions (net pay arrangement) which will be sent out the same week the contractor is to be auto enrolled in pension scheme due to this being a material change to the assignment rate.

Important information to include on KID:

- Rate
- Weekly hours
- Annual leave days (28 days for umbrella, 32.65 days for teachers)
- Accrued holiday tab selected (if requested on contractor sign up form)
- Apprenticeship Levy selected
- Atom Margin
- Click Download

No accrued holiday and no Pension example below:

The screenshot shows a form with the following fields and settings:

- Accrued Holiday Pay:** A toggle switch is turned off.
- Annual Leave Entitled:** A text input field containing the value "28.00".
- S/E - PAYE:** A toggle switch is turned off.
- Pension:** A toggle switch is turned off.
- Private Pension:** A toggle switch is turned off.
- Pension AVC:** A toggle switch is turned off.
- Apprenticeship Levy:** A toggle switch is turned on.
- Margin*:** A text input field containing "20.00", followed by a currency dropdown menu set to "£" and a small downward arrow.

Accrued holiday and Pension example below:

Accrued Holiday Pay	Add Accrued Emp Cost	Annual Leave Entitled
<input checked="" type="checkbox"/>	14.36 %	28.00
S/E - PAYE		
<input type="checkbox"/>		
Pension	Pension Scheme*	
<input checked="" type="checkbox"/>	Net Pay Arrangement x ▾	
Override Contribution		
<input type="checkbox"/>		
Private Pension		
<input type="checkbox"/>		
Pension AVC		
<input type="checkbox"/>		
Apprenticeship Levy		
<input checked="" type="checkbox"/>		





1. Click purple icon to generate first KID (without pension)

Manage Illustrations + Create

Manage Illustrations Q

Name: test New Business Administrator: New Business Admin From Date: 15/12/2024 To Date: 15/01/2025

[Reset](#) [Search](#)

Illustration Number	Name	Agent	New Business Administrator	Illustration	Sent Date	Action
ILLU5002993	test test		Phil McGivern	Unblock		   

Page 1 of 1 10 items per page 1 - 1 of 1 items

2. Select company name, Business Name, Type of contract and select Remove Cover Page box

3.Generate

Generate KID Document ✕

Generate KID For*
Umbrella ✕ ▼

Company Name*
Select Company ▼

Business Name*
Select Business ▼

Type Of Contract*
Select ▼

Additional Benefits
Enter Additional Benefits ↵

100 of 100 characters left

Include Candidate Name

Remove Cover Page

Cancel Generate

- Edit the illustration to select Pension Net Pay Arrangement and download.
- Repeat steps 1-3 above to generate KID with pension and label each of the 2 files accordingly.
- Note: an illustration cannot be edited once contractor is set up in a company for payroll.
- Save both files down to contractor folder.
- Send KID to contractor and agency via Hubspot using the templates below.

Select template



Owner: Any ▾

NAME ↕

KID - Sending directly to contractor

Select

AF - KID Doc for Agency

Updated KID - Pension Auto-enrolment

Attach KID to email below

▼ Email

Templates Sequences Documents Meetings ▾ Quotes ▾

To Kiran Sambell X

From Janine Le Clos (janine.le.clos@atomhub.co.uk ▾) Cc Bcc

Subject Kiran - KID from Atom Freelance

Hi Kiran,

I hope you are well.

Please find attached a copy of your KID from Atom Freelance confirming your employment.

It is a legal requirement for you to receive this for your records.

Thanks

|

B I U T More ▾ Insert ▾ Associated with 2 records ▾

Send ▾ Create a To-do ▾ task to follow up In 3 business days (Monday) ▾

Payment Links (0)

When contractor is auto enrolled in pension scheme, KID with pension is to be sent using relevant Hubspot email template as per below

The screenshot displays the HubSpot CRM interface for a contact named Kiran Sambell. The contact's profile includes their name, title (Social Worker), and email address (montego@hotmail.co.uk). The 'About this contact' section lists their phone number (079 885 98283), contact owner (Adam Mommsen), last contacted date (09/01/2025 22:13 GMT+2), lifecycle stage (Opportunity), and lead status. The 'Recent activities' section shows a recent email sent by Adam Mommsen with the subject 'Welcome to Atom Freelance', which has been opened 4 times. An email template is open, showing the recipient as Kiran Sambell and the sender as Janine Le Clos. The subject of the email is 'Updated KID - Pension Auto-enrolment - "contractor name"'. The email body contains a greeting, a well-wish, and a request to find an attached KID document. The signature is for Janine Le Clos at Atom. The interface also shows a 'Send' button and an option to create a 'To-do' task to follow up in 3 business days.