

THOMSON REUTERS

ONVIO™

CLIENT CENTRE
CUSTOMER GUIDE

CONTENTS

OVERVIEW.....	2
HOME SCREEN.....	3
E-SIGNING	4
DOCUMENT REQUESTS.....	7
DOCUMENTS.....	9

OVERVIEW

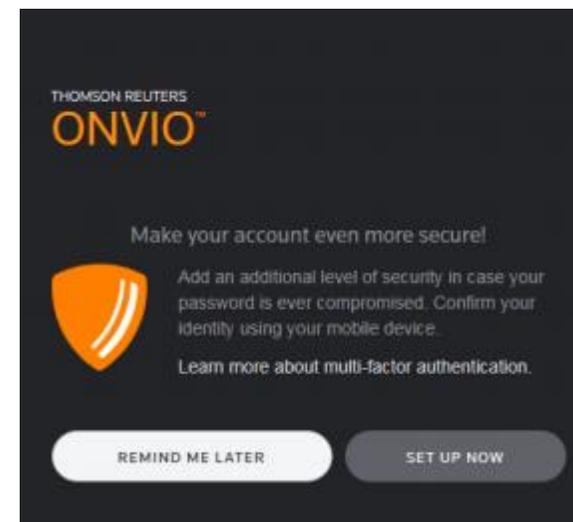
Onvio Client Centre allows you to view the documents that your Accountant has shared with you, as well as respond to requests for information and electronically (E-Sign) documents sent to you. You can also add documents to your account, for your Accountant's attention.

Your Accountant will send you an email to register your Client Centre account. To log into Onvio Client Centre, open a browser and enter the URL www.onvio.co.uk into the address bar.

Note: Internet Explorer is not compatible with Onvio Client Centre.

Apple and Android users can also download the phone app 'Onvio Client Centre.' The phone app enables you to take photos of documents and upload them as PDFs, as well as view and respond to tasks sent to you by your Accountant. If you need to reset your password at any point, this can be done on the log in screen of Client Centre www.onvio.co.uk

The first time you log into **Client Centre**, you will be prompted to set up Multi-Factor Authentication (MFA). MFA for Onvio is a two-staged log in. By setting this up, you will be required to enter a password, as well as approve your log in via the Thomson Reuters Authenticator app (available on the App Store and Google Play) when logging into Client Centre. To set this up, choose **SET UP NOW** when prompted. Otherwise, to skip past this section, select **REMIND ME LATER**.

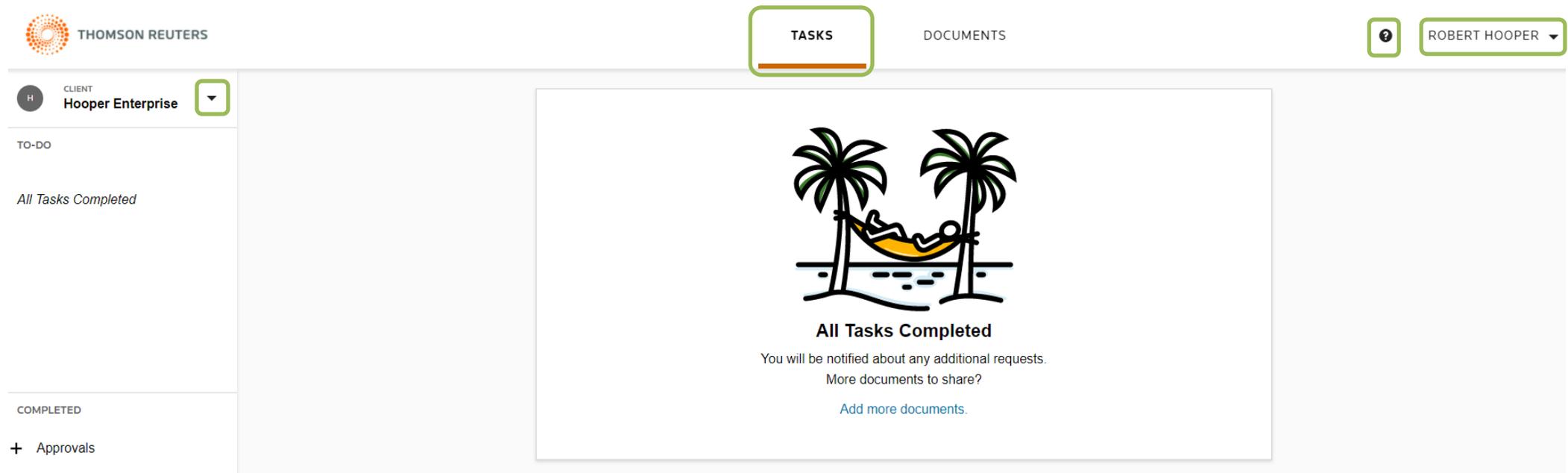
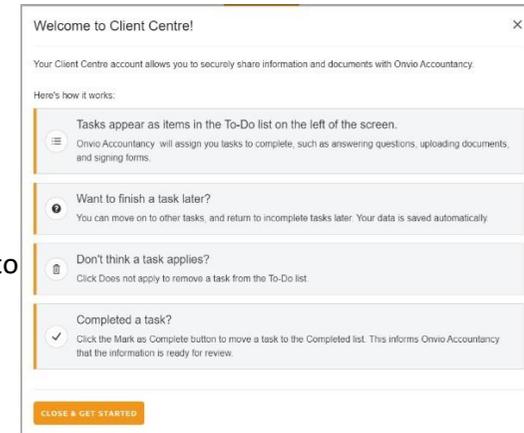


HOME SCREEN

When you log into Client Centre for the first time, you will be welcomed to your account with a brief overview of how to action a task sent to you by your Accountant. To begin, select **CLOSE & GET STARTED**.

In the top-right hand corner of Client Centre, your name displays. Select the drop-down arrow next to your name in order to edit your profile and sign out of your account. Select the **'question mark'** to access additional help resources.

At the top of the screen, your account is split into two sections; Tasks and Documents. Select **TASKS** to respond to a task sent to you by your Accountant. Within the left-hand task pane, you can select from the client drop-down list to view pending tasks sent to you to action on behalf of yourself, as well as your client relationships. An example of a task is a pending E-signature.



E-SIGNING

When your Accountant sends you an **E-Sign** request, you can use the **E-signing Wizard** to action this and send the signed document back to your Accountant.

Step 1. The Documents to review are listed, to proceed and review these documents, you must first read the **Electronic Record and Signature Consent Disclosure** by selecting the hyperlink. By then ticking the box, you are agreeing to these Terms and Conditions. To proceed, select **REVIEW & SIGN DOCUMENTS**. To decline the request, select **DECLINE** and add a comment to notify your Accountant.

The screenshot displays the Thomson Reuters e-signing interface. At the top, there are navigation tabs for 'TASKS' (selected), 'DOCUMENTS', and a user profile for 'ROBERT HOOPER'. On the left, a sidebar shows the user's name 'Hooper, Robert' and a 'TO-DO' list with 5 items, including 'Approvals', 'eSignature Request' (highlighted), and 'Requests'. The main content area is titled 'eSignature Request for Robert Hooper' and 'EXPIRES 28/01/2021'. It lists 'Documents to review' with two items: 'Robert Hooper - Tax Computation' and 'RH8934 Hooper R SA100 18-19'. Below this, there is a checkbox (highlighted with a green box) for agreeing to the terms. At the bottom of the main area, there are two buttons: 'REVIEW & SIGN DOCUMENTS >' (highlighted with a green box) and 'DECLINE' (highlighted with a green box). A green arrow points from the 'DECLINE' button to a 'Decline Documents' modal window on the right. This modal has a title bar with a close button, a text input field for 'Reason for Declining Documents *', and 'DECLINE' and 'CANCEL' buttons at the bottom.

Step 2. Confirm your signature style. Here you can either type, draw or upload an image of your signature which will appear on the signed document. Select **NEXT** to continue to review the documents as well as the confirmed signature style. **Note:** you can choose to submit or decline on the next screen, following review.

The 'Confirm Signature' modal window contains a 'Full Name' field with 'Robert Hooper' entered. Below it are three buttons: 'SELECT STYLE' (highlighted), 'DRAW', and 'UPLOAD'. Underneath is a 'Signature Style' dropdown menu showing 'Robert Hooper'. At the bottom left, there is a 'NEXT >' button.

Step 3. On this screen, review and approve the accompanying ‘**To Approve**’ documents listed within the left-hand task pane. Once approved, a blue tick will display next to the document title. Next, select each document beneath ‘**To Sign.**’ You can zoom in and out of the document, navigate between pages as well as print a copy before choosing to E-sign. To E-sign the document, select the **START** button displayed when selecting the document with a pending exclamation mark.

To Sign

 RH8934 Hooper R SA100 18...

To Approve

 Robert Hooper - Tax Comput...

 Attention Needed

There is 1 item that needs your attention on this document.

START

Client: Mr R Hooper (Tax Reference:2207552685)

Signing your form and sending it back

Please fill in this section and sign and date the declaration at box 22.

20 If this tax return contains provisional figures, put 'X' in the box

21 If you're enclosing separate supplementary pages, put 'X' in the box

22 Declaration
I declare that the information I've given on this tax return and any supplementary pages is correct and complete to the best of my knowledge and belief. I understand that I may have to pay financial penalties and face prosecution if I give false information.

Signature



Date DD MM YYYY

23 If you've signed on behalf of someone else, enter the capacity. For example, executor, receiver

24 Enter the name of the person you have signed for

25 If you filled in boxes 23 and 24 enter your name

26 and your address

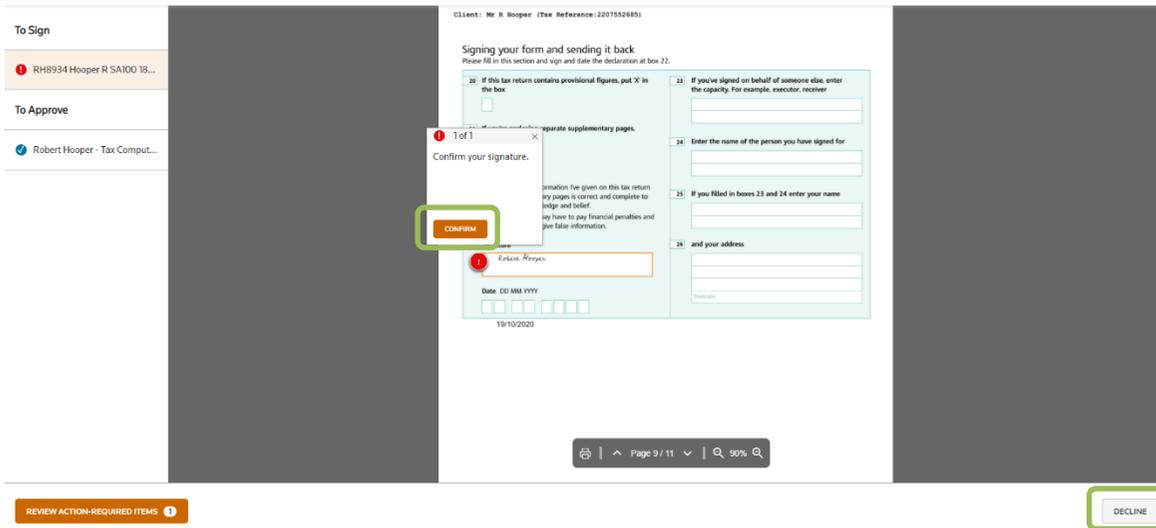
Postcode

DECLINE

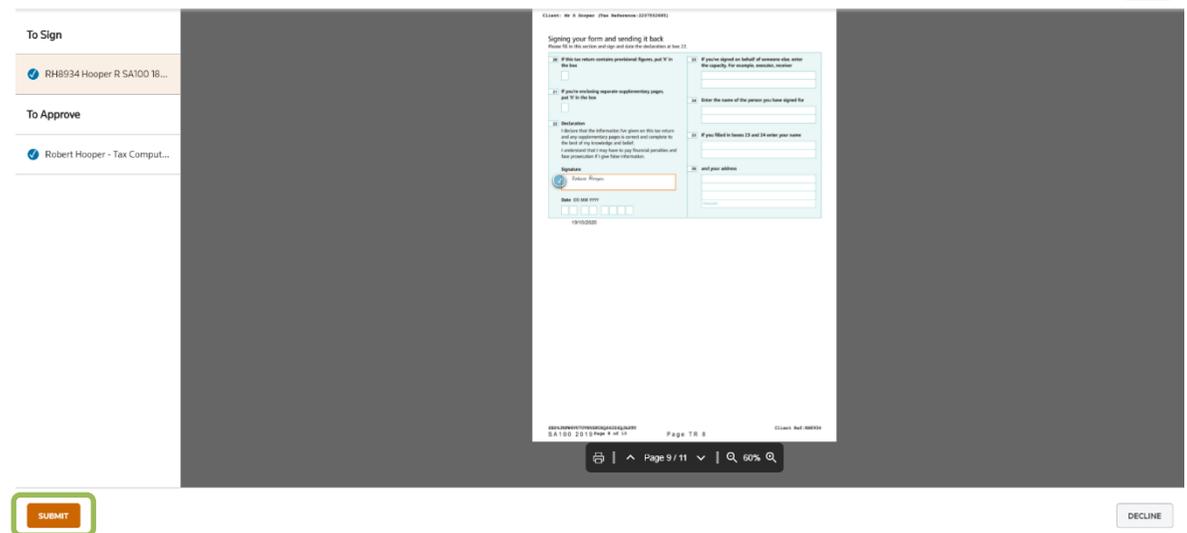
REVIEW ACTION-REQUIRED ITEMS **1**

 |  Page 9 / 11  |  100% 

Step 4. You are then taken to the location of the signature, select confirm to agree to E-sign. Alternatively, you can choose to **DECLINE** in the bottom right-hand corner of the screen.



Step 5. Once you have actioned all requests, they will be marked with a tick. **SUBMIT** then becomes available in the bottom left-hand corner. Select **SUBMIT** to complete the request and notify your Accountant of its completion. If they have not already done so, your Accountant will need to share the signed document with you. Once shared, you can access the document beneath the Documents tab, located at the top of your Client Centre account.



DOCUMENT REQUESTS

Your **Accountant** may send you a **Document Request**. You can use the process below to upload the requested documents, as well as comments for your Accountant's review.

Step 1. Ensure that the correct client is selected by clicking on the drop-down arrow located next to the client name, within the left-hand task pane. Once selected, the pending 'To-Do' items display with the total outstanding as well as a prompt towards the **new** tasks. Expand the '+' icon, next to Requests to view the pending **Document Request**.

Step 2. The **Document Request** appears in the central screen with each request available to select at the top, for example, Request 1, 2 and 3. The information being requested is listed, in the example below 'Please upload P60.' Use the **Upload Document** section to add the requested documents. You can select the **BROWSE FOR FILE** button, **DRAG A FILE HERE**, **SCAN FROM DEVICE** for those with the Client Centre phone app, or the **cloud storage** buttons. Once complete, tick 'All Documents Uploaded.'

Step 3. You can add comments to accompany the request by free typing into the **Additional Comments** box, these will then be visible to your Accountant upon submission.

The screenshot displays the Thomson Reuters interface for handling document requests. On the left, the 'CLIENT Hooper, Robert' is selected. The navigation pane shows 'TO-DO 2' and 'Document Request' (highlighted). The main content area is titled 'Document Request' and features a carousel of requests (Request 1, 2, 3). The selected request 'Request 1' has the instruction 'Please upload P60'. Below this is the 'Upload Document' section, which includes a 'Drag a File Here or' area with 'BROWSE FOR FILE' and 'SCAN FROM DEVICE' buttons. There are also buttons for 'Google Drive', 'Dropbox', and 'box'. A status bar shows '0 DOCUMENTS ATTACHED' and 'No documents to display'. An 'Additional Comments' section with a text input field is present, along with a checkbox for 'All Documents Uploaded'.

Step 4. Select **Next** to continue to the next **Request**. Alternatively, you can select each **Request** at the top of the screen to continue. Once all information has been uploaded, select **Mark as Complete**. This will notify your Accountant that the documents have been uploaded. The task will then move to the completed section within the left-hand task pane.

The screenshot displays the Thomson Reuters interface for a 'Document Request' task. On the left, a navigation pane shows 'Document Request' selected. The main content area includes a 'Have you had any new starters?' question, an 'Upload Document' section with a file upload area and integration options (Google Drive, Dropbox, box), and a 'MARK AS COMPLETE' button. A 'Confirm Task Completion' dialog box is overlaid on the right, asking for confirmation to complete the task. A green arrow indicates the flow from the 'MARK AS COMPLETE' button in the main content area to the 'MARK AS COMPLETE' button in the dialog box.

Step 5. After marking as complete you will be asked to confirm. Click **MARK AS COMPLETE** to complete the Request.

DOCUMENTS

To access documents that your Accountant has shared with you and to upload documents for their attention, select the Documents tab at the top of the screen.

Step 1. You can navigate between your clients by selecting the drop-down arrow located next to the client name, within the left-hand task pane. Once selected, the option **'All Documents'** within the left-hand task pane will display all documents, those that have been shared with you in relation to the selected client, as well as those that you have uploaded. You can separate this search by choosing either **My Uploads** or **Shared with Me**.

The screenshot shows the Thomson Reuters interface for managing documents. At the top, there are tabs for 'TASKS' and 'DOCUMENTS', with 'DOCUMENTS' being the active tab. On the right, the user's name 'ROBERT HOOPER' is displayed. On the left, a navigation pane shows the client 'Hooper, Robert' and a list of document categories: 'All Documents', 'My Uploads', and 'Shared With Me'. The 'All Documents' category is selected. Below this, a search bar and a time filter dropdown are visible. The time filter is set to 'All Time'. The main area displays a list of documents with the following columns: 'Associated Task', 'Added By', and 'Modified'. The list contains several documents, including 'Robert Hooper - Tax Computation.pdf', 'Updates and Installs for Digita Practi...', '64-8 (2019).pdf', '2020-10-07 - Test Document.pdf', 'RH8934 Hooper R SA100 18-19 (1).pdf', and 'R Hooper - SA100.pdf'.

Associated Task	Added By	Modified ↓
Robert Hooper - Tax Computation.pdf	Me	15/10/2020, 15:04
Updates and Installs for Digita Practi...	Me	07/10/2020, 16:10
64-8 (2019).pdf	Someone Else	07/10/2020, 16:06
2020-10-07 - Test Document.pdf	Someone Else	07/10/2020, 16:03
Updates and Installs for Digita Practi...	Me	07/10/2020, 15:49
Updates and Installs for Digita Practi...	Me	07/10/2020, 15:49
RH8934 Hooper R SA100 18-19 (1).pdf	Someone Else	07/10/2020, 11:09
Robert Hooper - Tax Computation.pdf	Someone Else	07/10/2020, 11:09
Updates and Installs for Digita Practi...	Someone Else	07/10/2020, 10:49
RH8934 Hooper R SA100 18-19.pdf	Me	07/10/2020, 10:49
Updates and Installs for Digita Practi... Document Request	Someone Else	07/10/2020, 10:26
R Hooper - SA100.pdf	Someone Else	07/10/2020, 10:26
R Hooper - Computation Summary.pdf	Someone Else	07/10/2020, 10:26

Step 2: To refine the central list, you can select **All Time** to only show documents from the selected time criteria. To search for a particular document, type into the search box located in the top right-hand corner.

Step 3: You can place a tick next to a document and depending on the permissions provided by your Accountant, you can complete one or multiple actions highlighted in white within the toolbar.

All Documents

Add
Download
Delete
Send
Search

All Time	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	Robert Hooper - Tax Computation.pdf		Me	15/10/2020, 15:04
<input type="checkbox"/>	Updates and Installs for Digita Practi...		Me	07/10/2020, 16:10
<input checked="" type="checkbox"/>	64-8 (2019).pdf		Someone Else	07/10/2020, 16:06

Step 4: To view a document on screen, select the name hyperlink, or the pencil icon next to the document. The preview screen opens and from here, you can print, download or rotate the document in the top-right hand corner. You can navigate between pages, zoom in and out, as well as use the arrows located on the far left and right-hand sides to preview the next or previous document within the list. To close the preview, select **CLOSE**.

64-8 (2019).pdf

Print
Download
Rotate
Close

CLIENT
Hooper, Robert

DOCUMENTS

All Documents

My Uploads

Shared With Me

←

+ ADD DOCUMENT

All Documents

All Time	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	Robert Hooper - Tax Computa			15/10/2020, 15:04
<input type="checkbox"/>	Updates and Installs for Digita			07/10/2020, 16:10
<input type="checkbox"/>	64-8 (2019).pdf			07/10/2020, 16:06
<input type="checkbox"/>	2020-10-07 - Test Document.			07/10/2020, 16:03
<input type="checkbox"/>	Updates and Installs for Digita			07/10/2020, 15:49
<input type="checkbox"/>	Updates and Installs for Digita			07/10/2020, 15:49
<input type="checkbox"/>	RH8934 Hooper R SA100 18			07/10/2020, 11:09
<input type="checkbox"/>	Robert Hooper - Tax Computa			07/10/2020, 11:09
<input type="checkbox"/>	Updates and Installs for Digita			07/10/2020, 10:49
<input type="checkbox"/>	RH8934 Hooper R SA100 18			07/10/2020, 10:49
<input type="checkbox"/>	Updates and Installs for Digita			07/10/2020, 10:26
<input type="checkbox"/>	R Hooper - SA100.pdf			07/10/2020, 10:26
<input type="checkbox"/>	R Hooper - Computation Sum			07/10/2020, 10:26

HM Revenue & Customs

Authorising your agent

Please read the notes on the back before completing this authority. This authority allows us to exchange and disclose information about you with your agent and to deal with them on matters within the responsibility of HM Revenue and Customs (HMRC), as specified on this form. This overrides any earlier authority given to HMRC. We will hold this authority until you tell us that the details have changed.

Print your name: **Mr Robert Hooper**

Business name: **of (name of your business, company or trust if applicable)**

authorise HMRC to disclose information to
(agent's business name)

Main office

I agree that the nominated agent has agreed to act on my/our behalf, and the information is correct and complete. The authorisation is limited to the matters shown on the right-hand side of this form.

Signature: see note 1 needed before signing

Date

Give your personal details or company registered office here

Address

Postcode

Phone number

Give your agent's details here

Address

Postcode

Phone number

Agent codes (SACT/PAYE)

Client reference: **RB8934**

For official use only

SA VAT (see notes 2 and 5 overleaf)

NHS VAT Registration Number

COP PAYE

NTC COP link

64-8 (Substitute) (Digita)

Please tick the box(es) and provide the reference(s) requested only for those matters for which you want HMRC to deal with your agent.

Individual/Partnership/Trust* Tax Affairs *select
*delete as appropriate (including National Insurance)

Your National Insurance number (Individuals only)
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
If you are self employed tick here

Unique Taxpayer Reference (UTR) (if applicable)
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
If UTR not yet issued tick here

If you are a Self Assessment taxpayer, we will send your Statement of Account to you, but if you would like us to send it to your agent instead, please tick here

Tax Credits

Your National Insurance number (only if not entered above)
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
If you have a joint tax credit claim and the other claimant wants HMRC to deal with this agent, they should sign here

Name

Signature

Joint claimant's National Insurance number
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Corporation Tax

Company Registration number
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Company's Unique Taxpayer Reference
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

NOTE: Do not complete this section if you are an employee. Only tick the box if you are an employer operator PAYE.

Employer PAYE Scheme

Employer PAYE reference

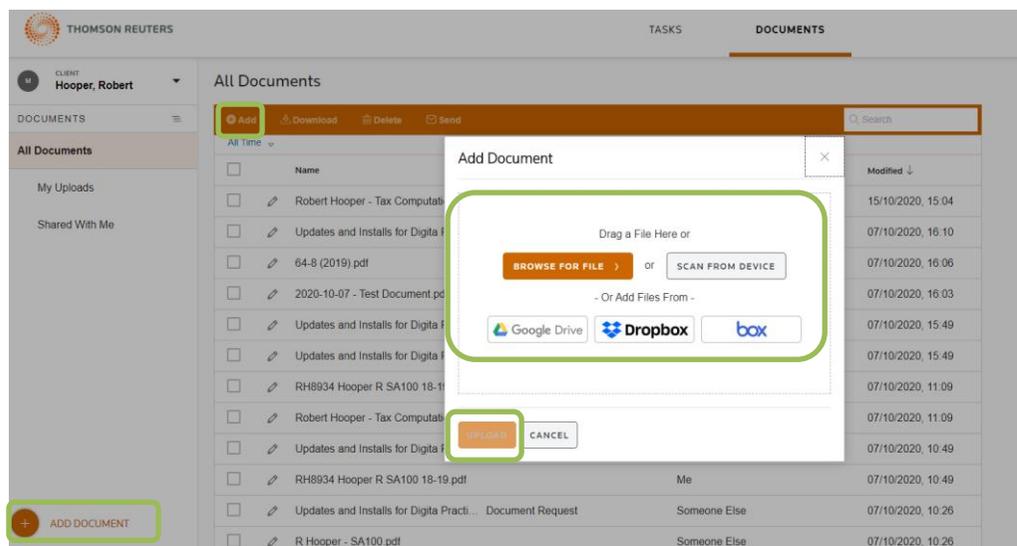
1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1 / 2

100%

→

Step 5: To Add a Document for your Accountant’s attention, you can select **‘Add Document’** in the bottom left-hand corner or **‘Add’** from the toolbar. Once selected, the Add Document dialog will open, where you can choose one of the upload options to select the required document/s. To upload, select **UPLOAD** in the bottom left-hand corner of the Add Document dialog. Your Accountant will then be notified.



Step 6: Finally, if you wish to see the folder structure that your Accountant has set up, select the three lines located in the left-hand task pane, next to Documents. You can expand the folders on the left-hand side to navigate.

