

CCH OneClick

**Digital Data Review +  
Digital Data Request**

Quick Start Guide



# Legal Notice

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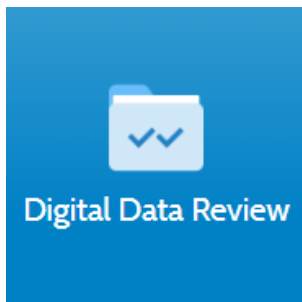
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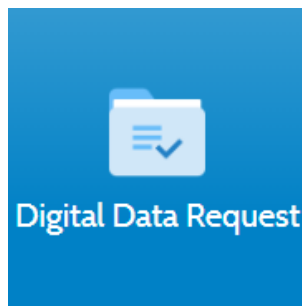
# 1. What is Digital Data Review?



**Digital Data Review** is the area within your CCH OneClick workspace where you can review and see all the tax data that your clients have sent you digitally, along with the data HMRC are already holding on your clients' behalf in their digital tax account (DTA)

Digital Data Review works in conjunction with the client smartphone application, Digital Data Request

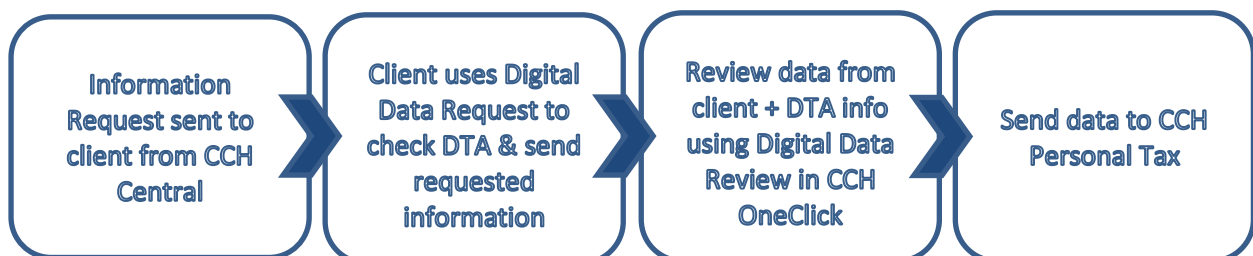
## 1.1 What is Digital Data Request?



**Digital Data Request** is a simple way to request data for your client's annual tax return. It can be accessed using either a phone or web based application that presents your client with a list of income sources for which they need to provide data, along with any supporting documentation required

This client side app is currently only available on the Android Smartphone platform

# 2. How do Digital Data Review and the Digital Data Request work together?



## 3. Prerequisites

- Certain conditions have to be met before the Digital Data Request application can be used by your client.
- They must have the following:-
  - Digital Tax account with HMRC
  - Activated CCH OneClick account with the Digital Data Request feature enabled
  - An android phone (if they will be using the phone based app)

### 3.1 System Setup

If your practice is not already authorised to access HMRC's pre-population data, please view the separate guide [CCH OneClick – Digital Data Review + Digital Data Request App Setup guide](#)

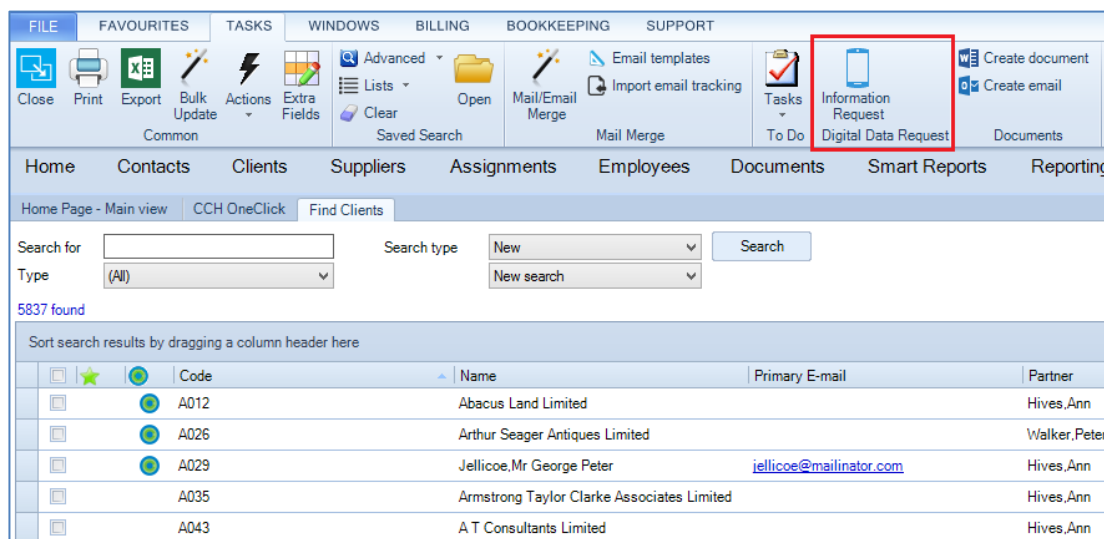
## 3.2 Information Request Email

The template for the email that is sent out to clients with the Information Request can be found in File > Maintenance > OneClick > Email Templates > SendInformationRequest

Please ensure you are happy with the content of this email before sending out the information requests

## 4. Sending Information Requests

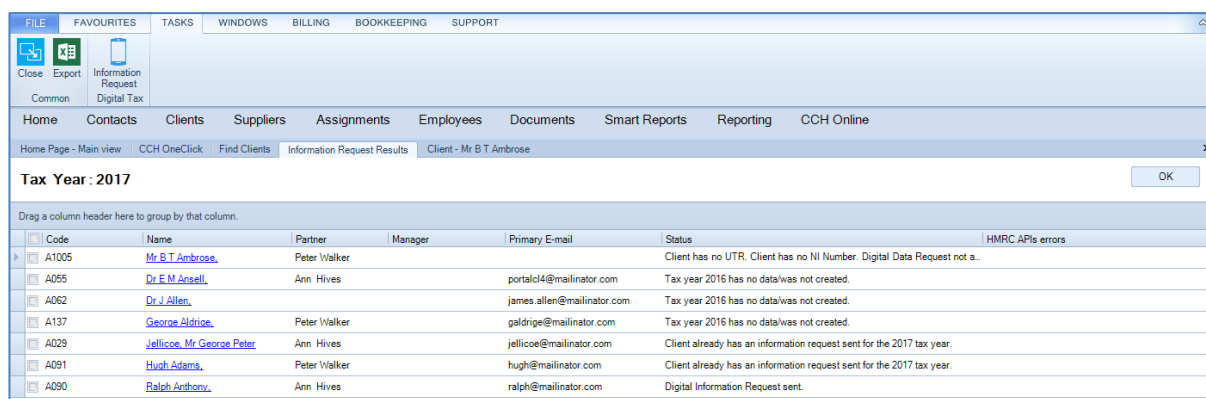
- An option called '**Information Request**' is available in the ribbon bar in the **Find Clients** screen allowing you to send the information request for a specific year to individual or multiple clients



**Please note that a client's information requests will be visible and editable by any associated contact activated for that client's OneClick workspace. This may include information such as previous year's tax return values and data from their Digital Tax Account**

**Only proceed after reviewing the associated contacts to ensure that there will be no unintentional data exposure**

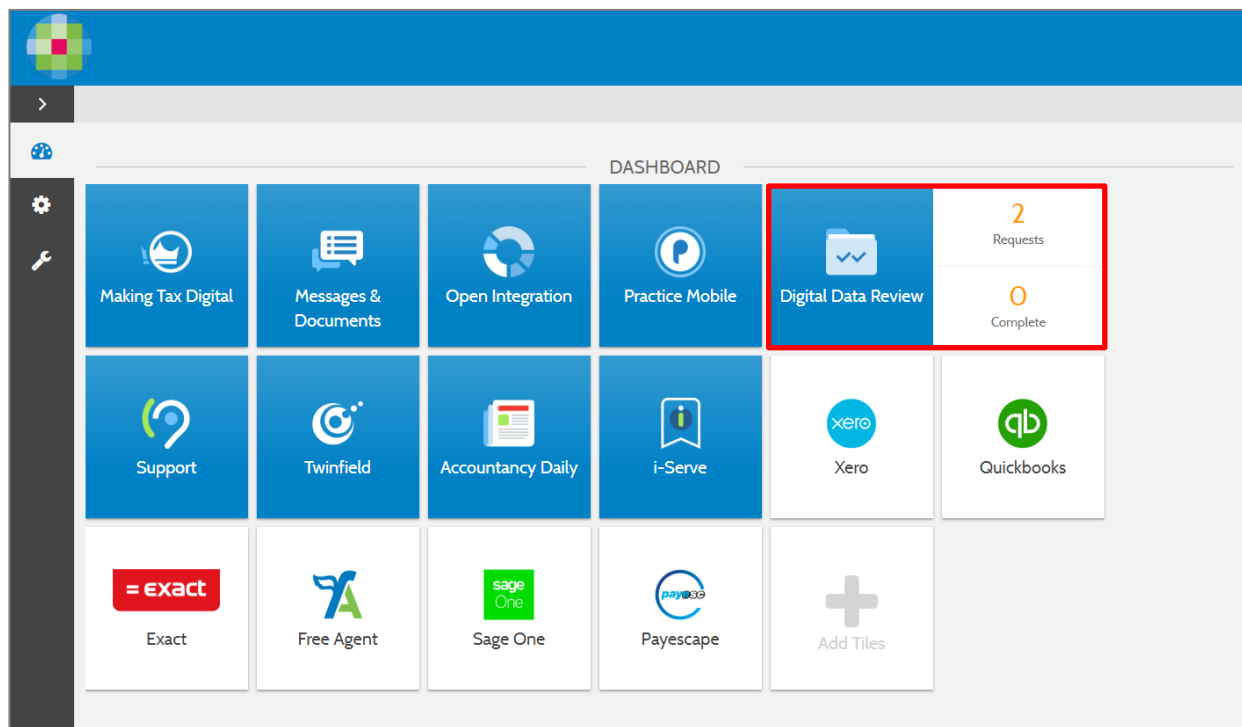
- In the **Find Clients** window, select the client/s you wish to send the information request to
- From the Digital Data Request group in the ribbon bar, select '**Information Request**'
- Select the relevant tax year in the wizard that appears and click Finish
- The **Information Request Results** screen is launched, displaying the results



- You can see the status of the information request in the **Status** column of the **Information Request Results** screen
- The **HMRC APIs errors** column lists any error messages that come from HMRC
- If the information request has not been successfully sent, you can click the client name hyperlink to open the client record and make any necessary changes
- Once the client records have been updated you can come back to the **Information Request Results** screen, select the relevant clients and click the '**Information Request**' option. The screen will be automatically refreshed, and the Status column will be updated with the current results

## 5. Digital Data Review

- The Digital Data Review tile is accessed through your practice CCH OneClick workspace



- On the Digital Data Review tile are displayed 2 counters:
  - The total number of information requests sent
  - The number of the completed information requests
- By clicking on the Digital Data Review tile, you can view all the information requests that you sent to your clients for all tax years. You can use the **Tax Years** filtering options at the top of the list to filter data appropriately for action

Information Requests

☒ All Tax Years
 ☒ 2017/2018
 ☒ 2016/2017

Clients	Client Code	Tax Year	Latest Comments	Date Modified	Progress
Berger, Peter	PB01	2017/2018		10/10/2017 10:10:04	1 incomplete (0/1)
Smith, Rita	DATA01	2016/2017		11/10/2017 10:25:39	5 incomplete (0/5)

This screen can also be filtered by **status** and **user**

By default, status is set to show **All**, where as user will default to the **user logged in**

Filter by status	Filter by user
All ▼	All ▼

Within the Request Status column, the following statuses are shown: -

- Request sent – An information request has been sent to the client via central
- Client viewed – A client has logged into OneClick – opened the digital data request tab – views one of the sources
- Client updated – A client has opened up a source e.g. employment income, entered an amount.
- Client completed – when a client has selected mark as complete or all sources have been completed.
- Adviser approved – An Adviser approves all the sources of income within the Digital Data Review screen

## 5.1 Information Request Details

- Clicking on an information request for a particular client will take you to the content (sources of income) of that request in its own screen

Digital Data Review > Smith, Mrs Rita

Smith, Mrs Rita

UTR: 6000046958 | Tax Year: 2017  
NI No: NSS43171C | Client Code: DATA01

> [dropdown] SAVE CANCEL REFRESH API's Last updated: 11/10/2017 11:25:39

- > Allowances [1 rows] ✓✓
- > Employment Income [2 rows] ✓✓
- > Pension Income [1 rows] ✓✓
- > UK Bank Interest Paid Gross [2 rows] ✓✓
- > UK Investment Income [1 rows] ✓✓
- Pensions, Annuities and Other State Benefits ▲
- > Marriage Allowance ▲
- > National Insurance Contributions

- At the top of the list are shown the client details including the UTR and the National Insurance Number (NI No)
- When the information request details screen is loading it will display just the source headers, hiding the details to enable you to quickly locate a relevant source of income, particularly when there is a large number of rows. You can then open specific sources individually
- **Expand All/Collapse All** options have been added to the information request details screen, allowing you to expand/collapse all rows

Digital Data Review > Smith, Mrs Rita

Smith, Mrs Rita

> [dropdown] [dropdown] SAVE CANCEL REFRESH API's Last updated: 11/10/2017 11:25:39

- > Allowances [1 rows]



- Click on a source of income header to expand the row and find out the income details

Digital Data Review > Smith, Mrs Rita

Smith, Mrs Rita

UTR: 6000046958 | Tax Year: 2017  
NI No: NS543171C | Client Code: DATA01

SAVE CANCEL REFRESH APPS (Last updated: 11/10/2017 11:25:39)

- Allowances [1 rows]
- Employment Income [2 rows]
- Pension Income [1 rows]**

Source	Status	2016/17	Previous year	Attachments	Comments
Aviva			£ 17,000.00	1	
- UK Bank Interest Paid Gross [2 rows]

- The current year column (e.g. 2016/17) displays the values submitted through the Digital Data Request mobile application or allows you to enter/edit the values
- By clicking on the **Attachments** icon all the documents attached by the client via the Digital Data Request mobile application are shown

Digital Data Review > Smith, Mrs Rita

Smith, Mrs Rita

UTR: 6000046958 | Tax Year: 2017  
NI No: NS543171C | Client Code: DATA01

SAVE CANCEL REFRESH APPS (Last updated: 11/10/2017 11:25:39)

- Allowances [1 rows]
- Employment Income [2 rows]
- Pension Income [1 rows]**

Source	Status	2016/17	Previous year	Attachments	Comments
Aviva			£ 17,000.00	1	
- UK Bank Interest Paid Gross [2 rows]
- UK Investment Income [1 rows]
- Pensions, Annuities and Other St
- Marriage Allowance

Attachments

Screenshot\_2017-09-06-10-14-52.png

- Clicking on the **Comments** icon allows you to view any messages between you and your client

Digital Data Review > Smith, Mrs Rita

Smith, Mrs Rita

UTR: 6000046958 | Tax Year: 2017  
NI No: NS543171C | Client Code: DATA01

SAVE CANCEL REFRESH APPS (Last updated: 11/10/2017 11:25:39)

- Allowances [1 rows]
- Employment Income [2 rows]
- Pension Income [1 rows]**

Source	Status	2016/17	Previous year	Attachments	Comments
Aviva			£ 17,000.00	1	2
- UK Bank Interest Paid Gross [2 rows]
- UK Investment Income [1 rows]
- Pensions, Annuities and Other St
- Marriage Allowance

Conversation

Smith, Mrs Rita 19 minutes ago  
Hello! I have completed the Pension Income source. Thanks!

psw@mailinator.com a few seconds ago  
Thank you!

Enter comment

- To send a comment to your client, enter the text in the box below the conversation chain and click the send button

## 5.2 Approve income sources

- For each source of income that requires the client to enter a figure, there are two ticks:-
  - The first tick means that your client has completed the source/section (it appears only when all the sub-sources are completed)
  - the second tick means that you have processed that source (when you marked all sub-sources as approved)

Smith, Mrs Rita		UTR: 6000046958 NI No: NS543171C	Tax Year: 2017 Client Code: DATA01
>  SAVE CANCEL  REFRESH APP Last updated: 12/10/2017, 16:39:13			
> Allowances [1 rows]		✓✓	
> Employment Income [2 rows]		✓✓	
> Pension Income [1 rows]		✓✓	
> UK Bank Interest Paid Gross [2 rows]		✓✓	

- The orange circle appears only when your client has made any changes, sent an attachment or a comment. The orange circle disappears when you expand the source
- A source/sub-source can be marked as completed by expanding the Status column and selecting Approved. Once a source is approved, your client will not be able to make any other changes for that source
- If an approved source/sub-source requires updates from the client you can mark that source as Incomplete

Smith, Mrs Rita		UTR: 6000046958 NI No: NS543171C	Tax Year: 2017 Client Code: DATA01
>  SAVE CANCEL  REFRESH APP Last updated: 12/10/2017, 16:39:13			
> Allowances [1 rows]		✓✓	
> Employment Income [2 rows]		✓✓	
✓✓ Pension Income [1 rows]		✓✓	
Source	Status	2016/17	Previous year Attachments Comments
Aviva		£ 5,000.00	£ 17,000.00  2  2
Tax deducted	Approved Incomplete	£ 550.00	
> UK Bank Interest Paid Gross [2 rows]		✓✓	


## 5.3 HMRC data

- If HMRC hold any data for an income source a snapshot of this data will be shown when the Information request is created for your client
- HMRC data is identified by the blue crown icon

National Insurance Contributions		
Source	2016/17	HMRC ⓘ
Total earnings liable to Class 1 NIC above PT and up to UEL	£ 10.00 🏰	
Class 2 NIC total due	£ 20.00 🏰	
Have maximum NI contributions been reached?	No 🏰	

- When an information request is sent the HMRC column is empty by default. This is automatically populated when the 'Refresh API's' button is selected

Digital Data Review > Smith, Mrs Rita

 Smith, Mrs Rita

> ▼ SAVE CANCEL
🏰 REFRESH API's Last updated: 13/10/2017, 10:01:03

> Allowances [1 rows]

> Employment Income [2 rows]

- The HMRC column provides an up-to-date view of the information HMRC currently holds for your client

National Insurance Contributions		
Source	2016/17	HMRC ⓘ
Total earnings liable to Class 1 NIC above PT and up to UEL	£ 10.00 🏰	£ 10.00 🏰
Class 2 NIC total due	£ 20.00 🏰	£ 20.00 🏰
Have maximum NI contributions been reached?	No 🏰	No 🏰

- If HMRC holds information for a collection of data but not for a specific client, a green icon is shown on the source header. By clicking on the green icon an information message is shown on the bottom right corner

Pensions, Annuities and Other State Benefits ⚠️

> Marriage Allowance ⚠️

> National Insurance Contributions

 Sorry! No data currently held by HMRC : Marriage Allowance

## 5.4 Send To Tax Return

- Once all relevant information is approved, it can then be sent to CCH Personal Tax

> ▼ SAVE CANCEL Send To Tax Return

- A warning will appear asking if you're sure you want to commit the values to CCH Personal Tax.
- Select **Yes** to send the data or **No** to cancel

Are you sure you want to commit these values to the corresponding Tax Return in CCH Personal Tax? All existing values will be overwritten.

Yes

No