

CCH OneClick
Guide for Clients



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1. CCH OneClick Activation

To enable you to use both the Messages & Documents and the Digital Data Request functionality within CCH OneClick, you will need to have an activated CCH OneClick account

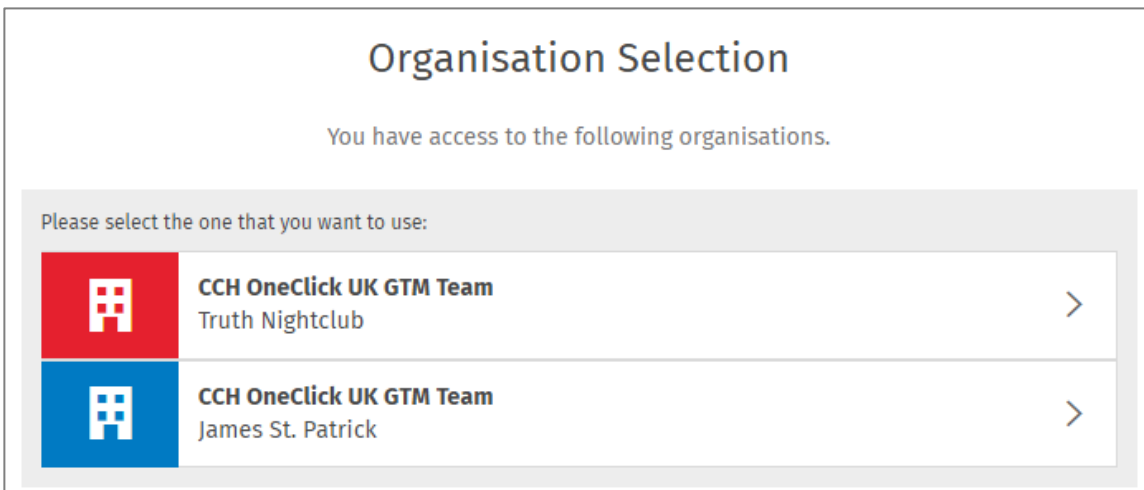
If you haven't already activated your workspace, you should have received an activation email sent by your accountant from notifications@accountantspace.co.uk

- Click the link in the email to setup your account and create a password
- Next, setup multi-factor authentication (MFA) to ensure your account is secure
- Log into the client workspace

If you need help with the activation process or setting up MFA, please refer to the relevant videos on this [page](#)

Organisation Selection Screen

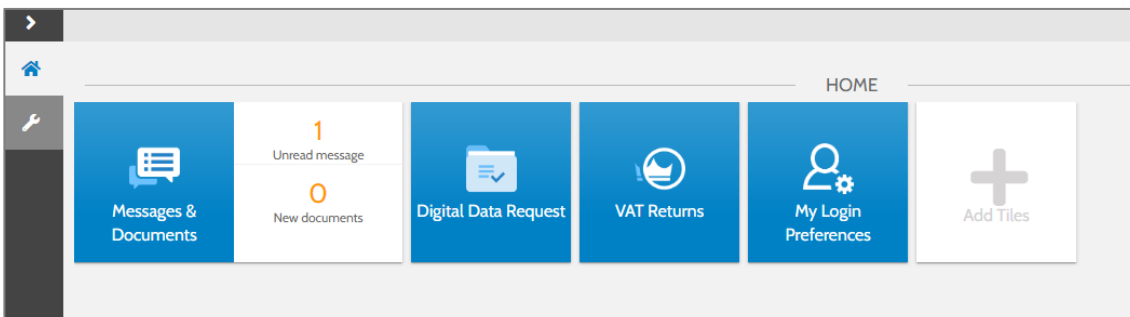
If you have access to more than one account, when you login, you will be prompted to select which account you would like to view using the organisation selection screen



Once you have logged in, you can select **Switch Account** to come back to this screen and view another account

Client workspace

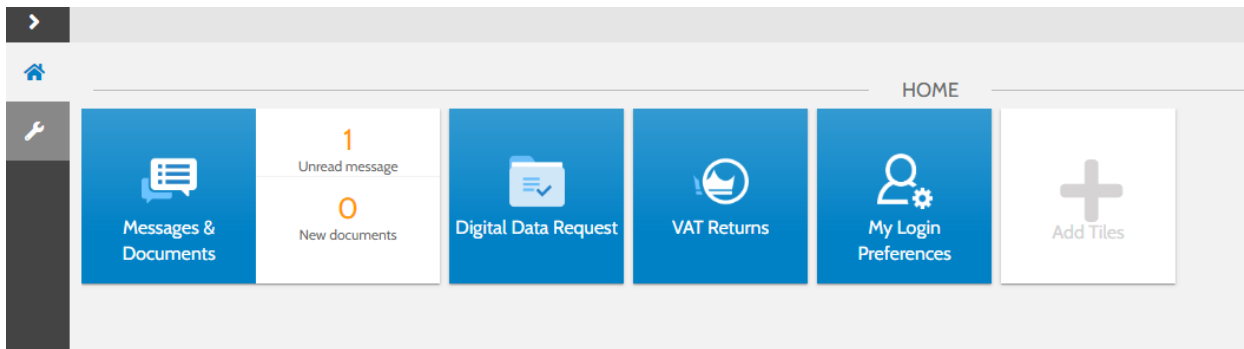
Your workspace will show the **Messages & Documents**, **Digital Data Request** and/or the **VAT Returns** tiles depending on the access given to you by your practice



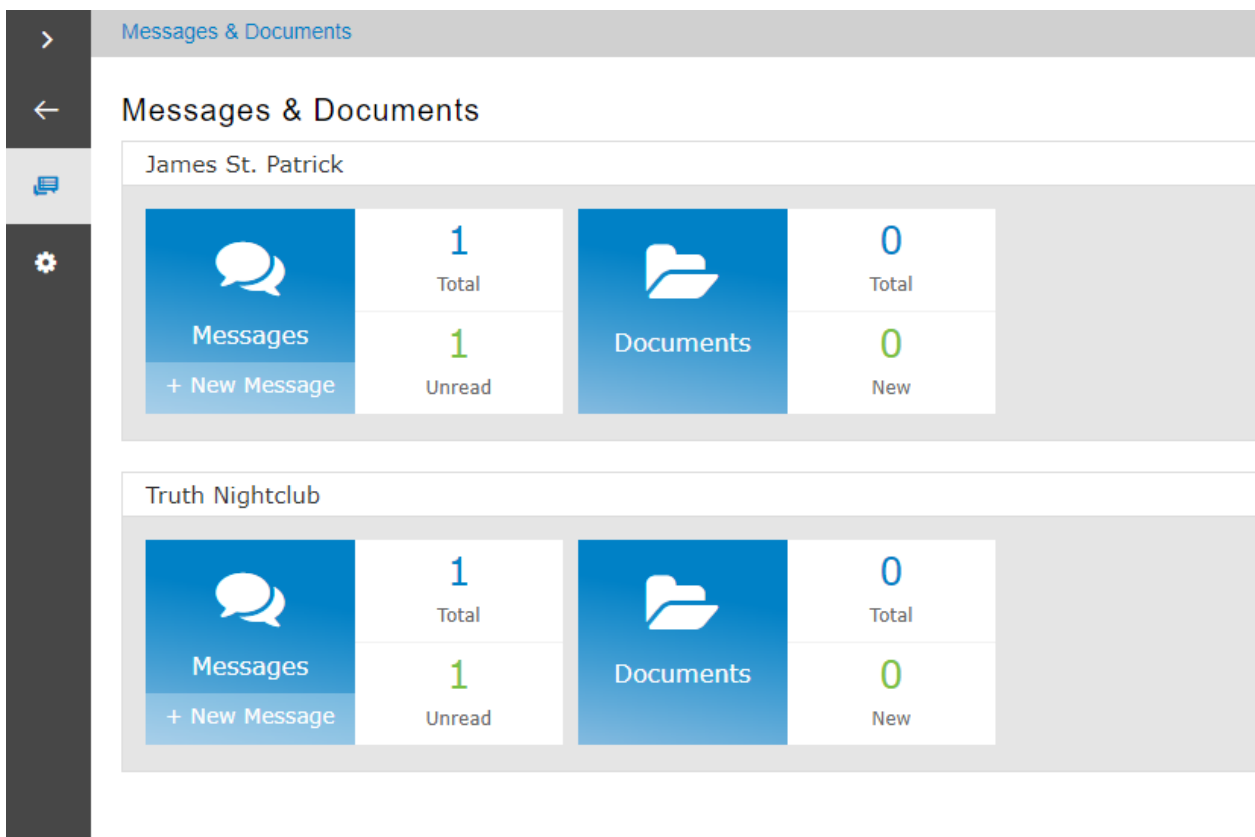
Select the **My Login Preferences** tile to change your password or add/amend MFA options

2. Messages & Documents

- Messages & Documents is the functionality within CCH OneClick that allows you to exchange messages, files and information online (previously known as Client Portal)
- It is accessed through your client workspace within CCH OneClick

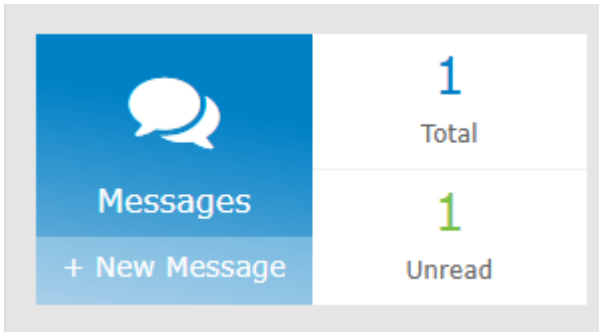


- From within Messages & Documents, you will see all accounts that you have access to
- If you are an associated contact of multiple businesses you will be able to see them all here



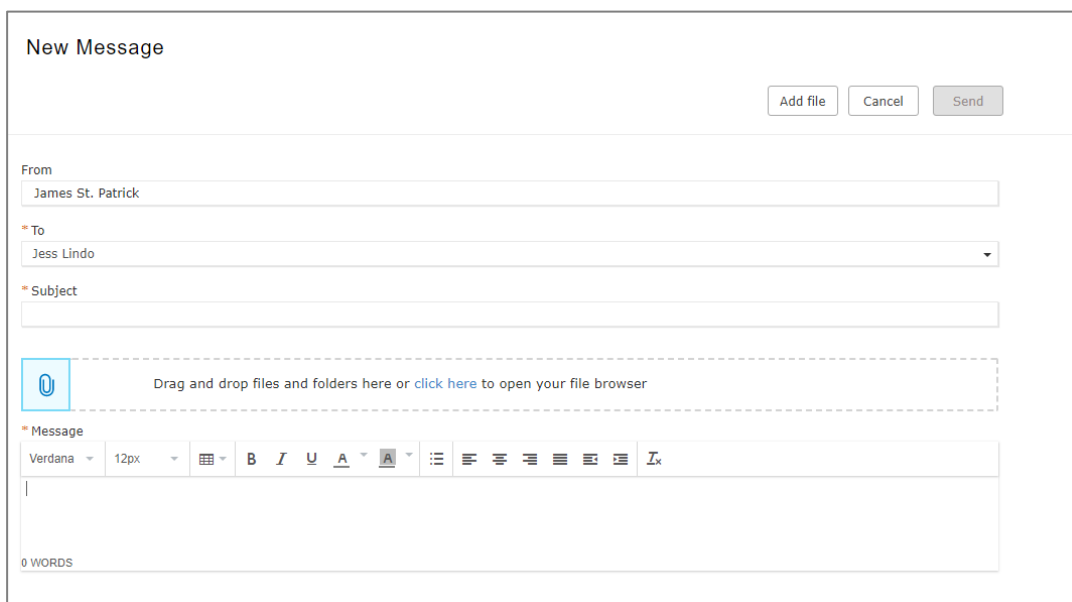
2.1 Messages

- The Messages tile will take you to the conversations for that account
- There is also an indicator here of how many messages you have and how many are unread
- You will be sent an email notification when you receive a new message



Create a message

- Select the + button at the bottom right of the screen to create and send a new message



A screenshot of a 'New Message' form. At the top right, there are three buttons: 'Add file', 'Cancel', and 'Send'. Below these are three input fields: 'From' (pre-filled with 'James St. Patrick'), 'To' (a dropdown menu with 'Jess Lindo' selected), and 'Subject'. Below the subject field is a dashed box with a paperclip icon and the text 'Drag and drop files and folders here or [click here](#) to open your file browser'. At the bottom, there is a rich text editor with a toolbar containing options for font (Verdana), size (12px), bold (B), italic (I), underline (U), text color (A), background color (A), bulleted list, numbered list, link, and unlink. The text area is currently empty, and '0 WORDS' is displayed at the bottom left.

- The To section is a required field. The dropdown list will allow you to send a message to any member of your client team
- Multiple employees who are in your client team can be copied in when creating or replying to a message. Additional employees will appear in the **To** field

To

Select client team contact(s)





✓ Select All ✕ Deselect All

-  Jake Nicholls
-  Jess Lindo

- The subject and message sections are also required fields so must be completed before the message can be sent
- Use the **Add file** button or drag and drop files to add an attachment to the message


Message list

- The exclamation mark signals that there is a document within this conversation needing your approval

Messages		
	3 Messages	
 Figures for my accounts James St. Patrick	0 replies, 1 attachment	13 October 2020 11:41
 Meeting next week Jess Lindo	0 replies, 1 attachment	13 October 2020 11:12 
 Welcome to the CCH OneClick UK GTM Team Messages & Documents facility Jess Lindo	0 replies, 0 attachments	8 October 2020 15:59

- Open the message and select which option you'd like to choose

Meeting next week

 From: Jess Lindo on 13 October 2020 11:12
To: James St. Patrick

Content:

Hi James

Please confirm you can make our meeting next Friday at 10:00am.

I've attached the agenda for your information.

Thanks

Jess

Attachments:

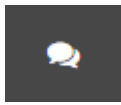
Meeting agenda.docx

- If approving the document, enter your login password
- You may have to view the document first before it can be approved

- Use the overview icon to return your list of available accounts, or the messages icon to return to the message list



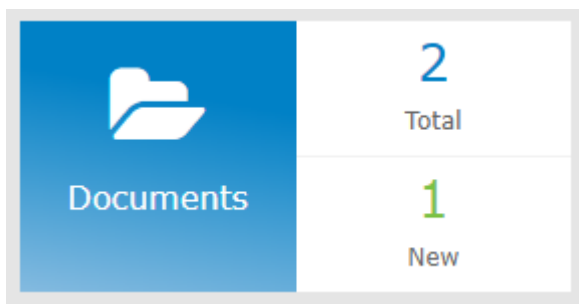
Overview



Messages

2.2 Documents

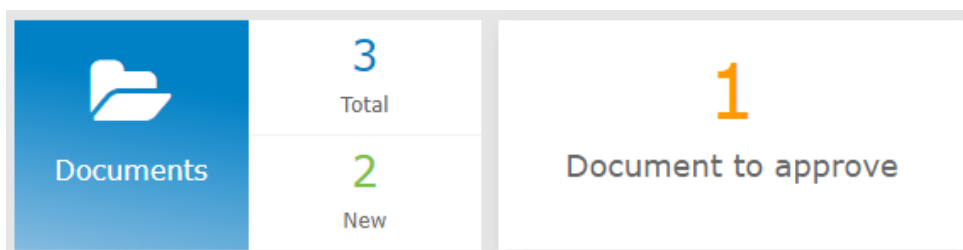
- The documents tile will take you to all the documents available for that particular account
- Select the new folder to view all the latest documents that have been received and not yet reviewed



- Documents will be split out into folders (as specified by your accountant)



- Access any documents needing your approval here



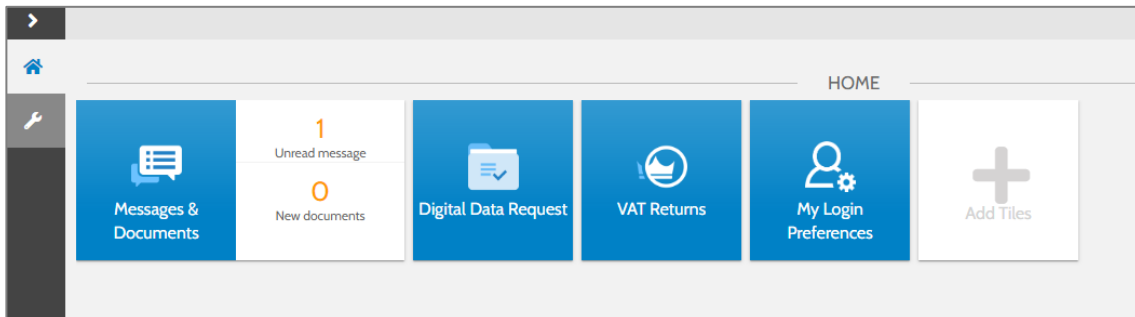
- Tick the checkbox next to the relevant document and select Approve, Reject or Download
- You will need to enter your password to confirm your decision

- Click the documents icon to return to your document list



3. Digital Data Request

- Digital Data Request will present you with a list of income sources from your accountant for which you need to provide data, along with any supporting documentation required
- It can be accessed using a browser-based application will be accessible through the **Digital Data Request tile in your CCH OneClick workspace** (if your practice has enabled this for you)



- If an information request has been sent, you will be presented with a list of items requiring action. If your practice has not sent you an information request, this screen will be blank



- Potential sources of income will include:-
 - Income from UK property
 - UK investment income
 - Employment income
 - Child benefit
 - Trading income
 - UK bank interest paid gross
 - Deductions
 - Foreign interest
 - Foreign dividend income
 - Other foreign income
 - Foreign state benefit income
 - Foreign pension income
- On all screens, please add the full amount of income and expenses
- The form will auto calculate your personal net income from this at the end based on the percentage %
- The drop down can be used to filter on tax year

Year

✕ 2020-2021 ▾

2016-2017

2017-2018

2018-2019

2019-2020

2020-2021

2021-2022

- Select a row to see that section
- When you open a section you can review the data which is displayed
- Some of the information may be pre-filled by HMRC and cannot be changed

Digital Data Request

[Add Additional Info](#) [Mark All As Complete](#)

Year

✕ 2020-2021 ▾

Tax Year	Source	Sub Source	Last message	Status
2020-2021	Income from UK Property	67A Scotland Bridge Road Addlestone		Update required
2020-2021	Trading Income	P&J Builders 01/01/2020 - 31/12/2020		Update required
2020-2021	UK Interest	Baricays 96965478		Update required
2020-2021	UK Interest	HSBC 71215698		Update required
2020-2021	UK Investment Income	GlaxoSmithKline PLC 50p Ordinary Shares		Update required
2020-2021	UK Investment Income	Tesco PLC £1.00 Ordinary Shares		Update required

- Use the buttons at the top to add additional information or mark all as complete

Digital Data Request

[Add Additional Info](#) [Mark All As Complete](#)

Year

✕ 2020-2021 ▾

- When you click on a row the information will show on 3 tabs

DATA ATTACHMENTS MESSAGES

Data

- Review and make any required changes to the figures in each section (if applicable) then select **Save**, or **Cancel** to discard your changes

Digital Data Request > Trading Income

DATA ATTACHMENTS MESSAGES

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P&J Builders 01/01/2020 - 31/12/2020

Please ensure you have attached either a Trial Balance, Profit and Loss Account and Balance Sheet or any other relevant documentation to support your Trading Income for the **2020** year.

Status

Update required

Previous Year Amount

0.00 GBP

* Amount

£500.00

Tax deducted

£100.00

Save Cancel

Attachments

- The attachments feature allows you to quickly attach documents to a section
- Use the **upload attachment** button to attach any relevant documents to each income source

DATA **ATTACHMENTS** MESSAGES

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Upload Attachment

Name

Test spreadsheet.xlsx

- Once uploaded, you can preview the attachment by selecting the relevant line

Messages

- The message feature allows you to quickly send a message or comment about a particular section to the practice
- Select the **Add a message** button to add a message /comment

DATA ATTACHMENTS **MESSAGES**

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Add a message

Message	From	Date
This is a test	univ+martin@holcroft.net	14/10/2020 11:51 AM

3.1.1 Joint Income

- If a source of income is marked as joint this will be shown by the tick box being completed
- If there is a share /% this will also be populated

Jointly Owned

Share %
50 %

3.1.2 Other foreign income

- The currency details will automatically be populated here if applicable

Currency
Belgium - EUR

4. VAT Returns

A separate guide to show you how to use the VAT Returns functionality can be found [here](#)