

# **How to use’ guide to the portal – overview**

## **Introduction**

In a world where data security is becoming an everyday news story, we at Old Mill always want to ensure that our clients documents are protected and how we communicate with our clients is secure.

With this in mind, we use a portal service to send and receive documents. While we have been using this for a while now, it has proven a vital part of our day to day working during this pandemic. It ensures there are no delays while working from home for both us and you as the clients, as queries and documents have been sent via the portal instead of being posted.

## **What is the portal?**

By using the portal, which uses the same security systems as online banking, we are able to securely send you documents e.g. your tax return, for your approval. This therefore reduces the amount of paper involved and removes the need to password protect any documents. This also works the other way, as by using the portal you can upload and send documents to us. These documents will remain within your portal account for access at any time for your convenience.

## **How do I get set up on the portal?**

- You will receive an email with a link to our portal page (check junk / spam folder)
- You will then need to choose a password and set up your login including how you would like to receive an authentication code which will be sent when you log in.
- If you have a sole trade business, you are partner in a partnership, a member or director you will also have access to these within your same log in.

## **Receiving / sending documents**

- You will receive email notifications when any messages / documents are sent to you
- You can then click on the link within the email, this will take you to the log in page
- Once logged in you can then see what has been sent to you
- Uploading documents to send to us, use the ‘new message’ option and attach documents / send a message just like an email.
- We will then receive an email making us aware you have sent documents / messages to us.

## Approving / declining documents

- When approving documents, they have to be opened in order to approve / decline them
- The approval / decline buttons will be greyed out until the document has been read
- Once approved / declined we will get a notification and will deal with accordingly.

## FAQ

### **I have forgotten my password; how do I change it?**

On the log in page – ‘forgotten password’ then follow the instructions on screen,

**Please note, if you have ever used the ‘remember me function’ you will need to update this so it saves your new password.**

### **Will not let me approve the document?**

Ensure you have opened and read through the document. If happy ensure the box is ticked next to the relevant document and the approve button should become available.

### **I have clicked on a document and it has not opened?**

Depending on what device you are using (Mobile, Laptop etc) will depend on how the documents open (also how you have your settings will make a difference). Please check they have not opened a new tab / window or along the bottom of the screen there maybe a ‘downloaded’ document which you can click on and should open.

### **I have a query not answered above**

Please contact your usual Old Mill contact and they will be happy to help or put you in touch with the relevant person.

