



## The Onboarding Process



Once you have chosen to work with Ascentant and agreed our proposal, the onboarding process will begin.

1. You will be invited to our Secure MyDocSafe portal.
2. You will receive a welcome email from us detailing your main contacts and enclosing our New Client form and ID form. This will also enclose supplementary service information such as how to use our portal.
3. We will issue our Engagement letter. This will include the terms and conditions of the engagement. It will be uploaded to our portal for review and electronic signature.
4. Following completion of your New Client form and ID form, your ID listed in the ID form should be uploaded to the portal.
5. We will review the completed forms and ID and confirm that everything has been received. It is important to locate all UTR numbers and your CAC Code during onboarding. We will **not** be able to file your Accounts or tax returns if this information is not provided.

<https://www.gov.uk/find-lost-utr-number>

<https://www.gov.uk/guidance/company-authentication-codes-for-online-filing>



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6. We will set you up on our CRM with all of the information provided. This includes important due dates for Accounts/Tax Returns. We will follow up when filings are due, but you should also keep a note of filing due dates. We will prompt you for information when filings are due.
7. If you worked with a prior Accountant, you should contact them to let them know that you have appointed us.  
  
When you confirm that they have been contacted, we will send them correspondence requesting professional clearance and copies of tax returns, codes and other information that we may need to undertake our role.
8. We will contact HMRC to ask for agent access so that we can view your tax information (Self Assessment/Payroll/VAT/Corporation Tax) as required. You will receive a letter in the post with this code, which must be provided to us.
9. We may need to request MTD Agent access if you have MTD VAT set up.
10. Where you have access to an Automatic Enrolment pension scheme, you should invite us to this.
11. Where you have access to Bookkeeping software such as Xero, you should invite us to this.