NetClient and Onvio Client Center Communication Template

To assist your firm in providing information about the new sign-in experience to your clients who use NetClient CS and Onvio Client Center, we have created a video and the following email template:

Hello <client name>,

We’re reaching out to share details about required changes to your NetClient CS portal. Our firm partners with Thomson Reuters to provide the platform for these portals, and the company made an update in November 2023 that will simplify and improve your sign-in experience and bring enhanced security with two-factor authentication.

These changes are live now, and the next time you log into your NetClient CS portal you will need to follow these steps to update your account.

**What you need to know:**

* You’ll need to update your existing NetClient CS portal to use the same Thomson Reuters Account credentials currently used for Onvio Client Center. To do this, you’ll need your current NetClient CS login ID and password. If you’ve saved these details to your browser, please write them down or copy them to a backup location. If you’ve forgotten your login ID, please reply to this e-mail.
* To start the upgrade process, use your existing NetClient CS portal credentials to login to NetClient CS. Once successfully moved to the next step and prompted for an e-mail address, enter the same one used for your Onvio Client Center credentials. Once you complete the process, your Onvio Client Center and NetClient CS portals accounts will be linked. The authentication method you previously set-up for Onvio Firm Management will now also apply to NetClient CS
* The sign-in page will look different but will function the same way. This [video](https://video.tax.thomsonreuters.com/watch/8o4h3H6qpb9UGUjEyBKNsn?) showcases the new experience.

These changes occurred on November 18, 2023. You can find further information and resources to support with this change from Thomson Reuters: <https://www.thomsonreuters.com/en-us/help/account-management/thomson-reuters-account/set-up-an-upgraded-client-thomson-reuters-account.html>

Regards,

<Firm signature>