

How can Digita and Onvio solutions help accountants manage GDPR compliance?

The EU General Data Protection Regulation (GDPR) commences on 25th May 2018 and imposes tough new requirements on the collection, use and storage of personal data, and formalises the processes around data governance. The GDPR represents a paradigm shift in privacy requirements governing how organisations respect and protect personal data.

Thomson Reuters is committed to protecting personal data as required by applicable privacy legislation including the GDPR. Our commitment is supported by a core team of privacy experts, employee data privacy and information security training and our privacy compliance program which is led by our Privacy Office. More information about how Thomson Reuters is preparing for the GDPR can be found here <https://www.thomsonreuters.com/content/dam/ewp-m/documents/thomsonreuters/en/pdf/faqs/thomson-reuters-and-the-gdpr.pdf>

Under the GDPR, personal data includes, but is not limited to, any information relating to an identified natural person, for example name, email address, online identifiers, location, and phone number. Some personal data is classified as “special categories” and processing of this data requires extra care. This type of personal data includes, but is not limited to race, ethnic origin, political affiliation, trade union membership, health and sexual orientation.

Accountants are used to working with their clients’ personal data, but GDPR imposes significant new requirements and a thorough review of the processes you use to manage and process personal data is required. You should identify what personal data you store, its origin, who has access, where it is stored and who it is shared with.

This document aims to outline how our [Digita](#) and [Onvio](#) solutions can help you manage and protect personal data and how they can be useful tools to assist accountancy practices with GDPR compliance.

There are three areas where Digita and Onvio can assist with GDPR compliance:

- Managing and protecting sensitive client data
- Sharing personal data with your clients and employees
- Security in the cloud

Managing and protecting client data

Alongside your firm’s new GDPR compliant processes and controls, Digita and Onvio can be useful tools in helping you manage and process personal data by:

- Reducing the number of technology tools and standardising client data storage on one main platform such as the Digita Professional Suite, can help with the management of personal data and allow you to respond efficiently to matters such as data access or erasure requests and data breaches.
- Storing and sharing personal data in spreadsheets can pose a significant risk. Thomson Reuters’ solutions can help reduce your reliance on spreadsheets and create a more secure environment where there are formal access controls around personal data stored in your compliance solutions.
- There are audit controls built into both Digita and Onvio solutions to monitor and record whenever any sensitive data is amended or deleted.
- Within Digita Practice Management and Digita Personal Tax there are levels of permissions that help you to control staff access and/or ability to change clients’ personal data.
- The entire Digita Professional Suite has undergone vulnerability testing.

Sharing personal data with your clients and employees

The risk associated with personal data can be at its highest when data is ‘in transit’ – when files or documents are being sent internally within a firm or exchanged externally with your clients. Reducing the risks associated with sending and receiving documents containing personal data is of the utmost importance.



Thomson Reuters provides cloud-based portal and document management systems, specifically designed to make document sharing and transfer easy and secure. The portal can be used for two-way collaboration for requesting and sharing essential documents and files. All work can be completed in a secure online environment and every document is encrypted. You do not have to create copies of files or ask your clients to email you spreadsheets containing sensitive data which can introduce serious security risks.

Security in the cloud

In the new world of GDPR, liability for data breaches continues to be a fundamental concern. If you are using hosted or cloud-based systems, it's important to make sure that your solution providers have appropriate GDPR compliant processes in place. They must have strong security systems and data protection policies for customers' data. We scan and monitor the environment for known vulnerabilities and anomalous behaviour.

Thousands of Thomson Reuters customers across the globe use our hosted and cloud solutions, including in the UK our Digita Virtual Office (hosted) and Onvio (cloud) systems. In the UK, security features of these hosted products currently include: data encryption and vulnerability testing and, will in the coming months include multi-factor authentication.

HOW CAN THOMSON REUTERS DIGITA AND ONVIO SOLUTIONS HELP ACCOUNTANTS COMPLY WITH GDPR?

[Digita Personal Tax](#) offers an end-to-end digital experience, from the start of the tax year where personal tax information can be requested in Onvio Client Centre (client portal), through to e-signing the tax return and finally submitting it electronically to HMRC. We can help you implement best practice with regard to critical data every step of the way. Our security functionality meets the rigorous permissions criteria of three of the UK's top 10 firms.

Along with providing multiple access control levels, Digita Personal Tax also provides audit functionality for the most sensitive data fields. The software logs which member of an organization's staff changed client information and when it was changed.

[Onvio Documents and Client Centre](#) are the next generation solutions for document management and portal technology. Security features restrict staff access to assigned clients only and all documents are encrypted at rest to add an additional level of security. Furthermore, to maximise convenience and security, we offer your clients the convenience of Onvio Client Centre, our portal solution. This provides your clients with a simple, centralized, location to send and store their financial documents.

Thomson Reuters' enterprise-level Document Management solution, [GoFileRoom](#), is our cloud-based document management solution which includes Multi-Factor Authentication functionality. Advanced rules for document purge and archive helps with data minimisation (a GDPR requirement and principle that the data you collect and process shouldn't be used or kept longer than is necessary for its original stated purpose) and reduces risk.

[Digita Virtual Office \(DVO\)](#) provides a platform for hosting our full Digita Professional Suite. With DVO you have no software to install on local servers – Thomson Reuters hosts the solution for you and you access it via an Internet browser. This is a straightforward, low maintenance and secure way of running the full Digita Professional Suite and can help reduce risk related to GDPR compliance.

- As one of many Thomson Reuters hosted solutions, DVO is regularly assessed for known vulnerabilities.
- Over 60 aspects of the environment have gone through the scrutiny of a detailed Privacy Impact Assessment to meet GDPR compliance requirements.
- Security is also enhanced by using our Thomson Reuters authenticator app that provides Multi-Factor Authentication.

GDPR for accountants will bring both challenges and opportunities. We've collated our resources into our [GDPR Hub](#) – your go-to online resource for reliable information.