RegData user guide

Viewing your schedule

This user guide explains:

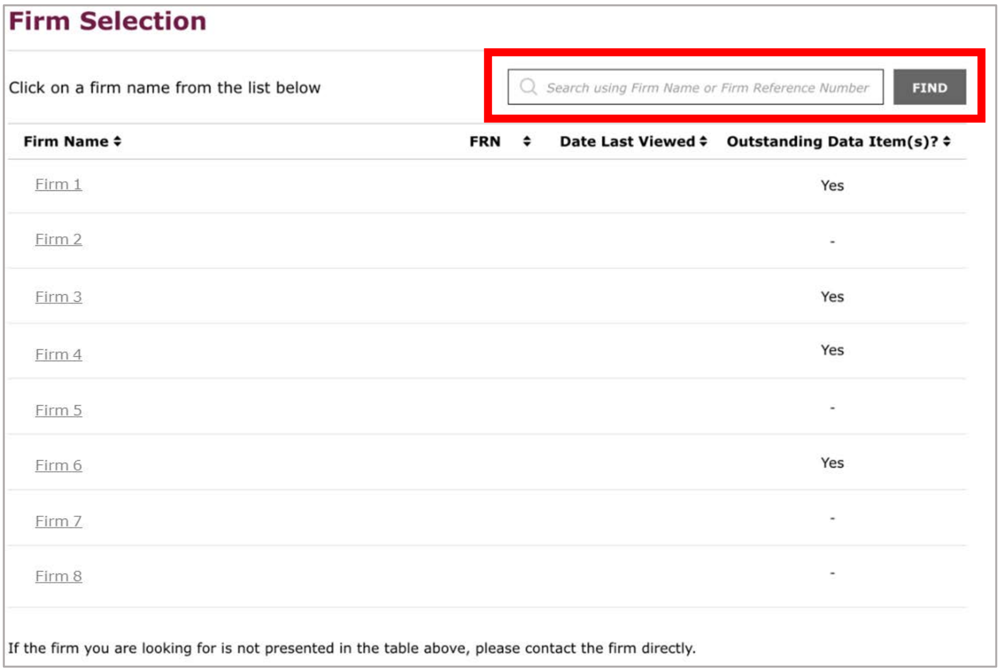
- how to navigate to your firm's Reporting Schedule
- viewing your returns
- the structure of your schedule

1. Navigating to your firm's Reporting Schedule

After logging into RegData you will either see:

- your firm's schedule, if you only report for 1 firm, or
- a list of firms, if you report for multiple firms

If you **report for multiple firms**, scroll through the list of firm names and click on the name of the firm schedule you wish to view. You can also use the search box to find a firm by its Firm Reference Number (FRN):


Firm Selection

Click on a firm name from the list below

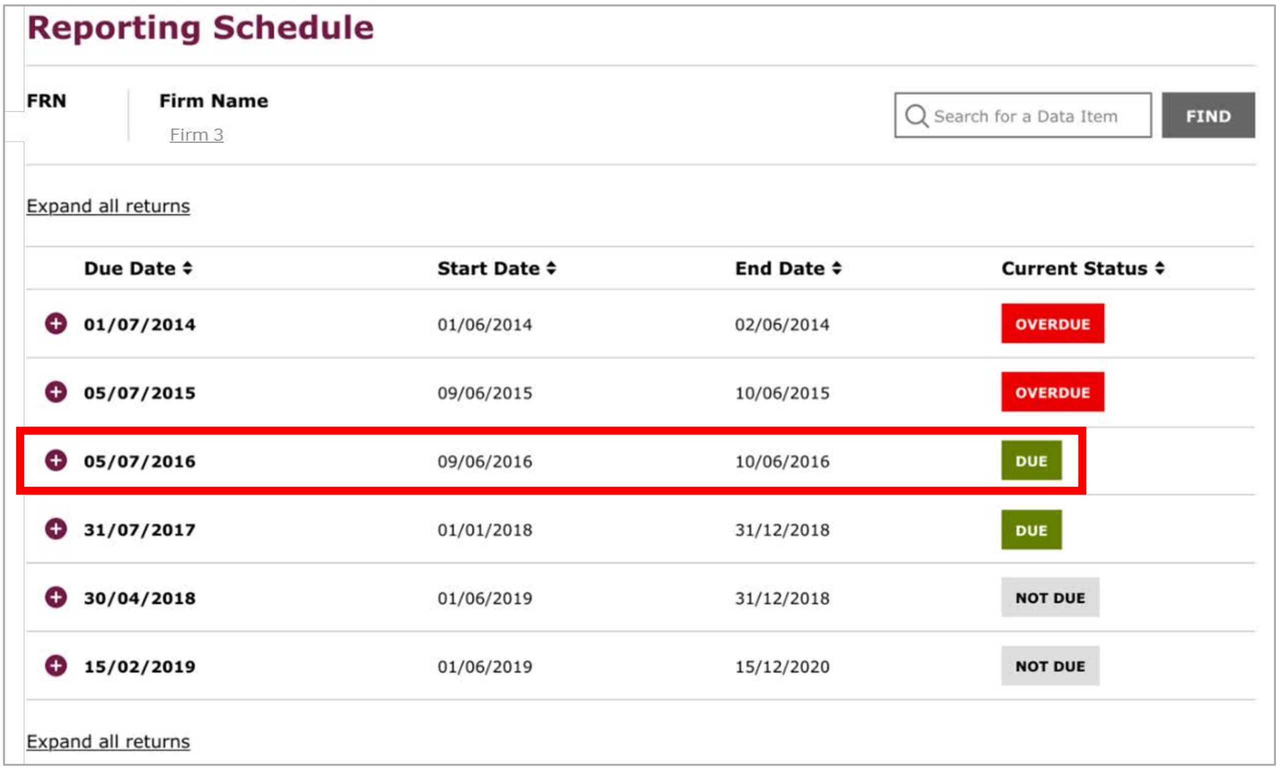
Search using Firm Name or Firm Reference Number FIND

Firm Name	FRN	Date Last Viewed	Outstanding Data Item(s)?
Firm 1			Yes
Firm 2			-
Firm 3			Yes
Firm 4			Yes
Firm 5			-
Firm 6			Yes
Firm 7			-
Firm 8			-

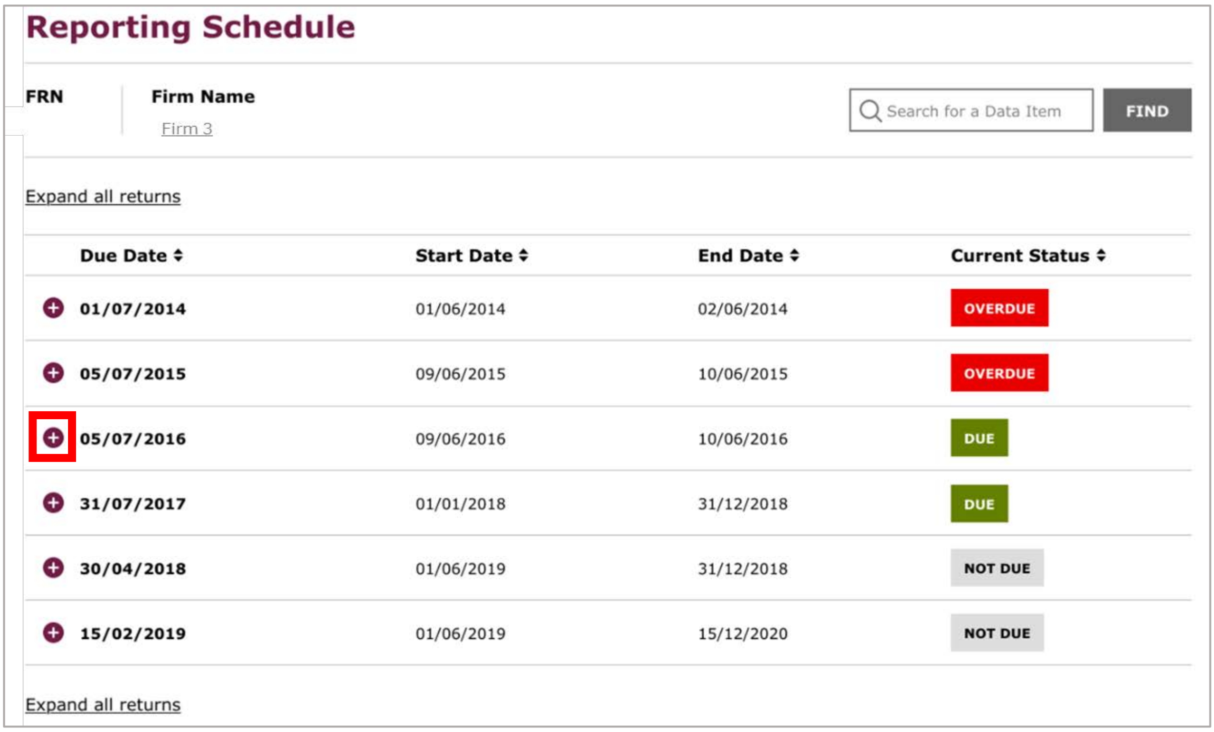
If the firm you are looking for is not presented in the table above, please contact the firm directly.

2. Viewing your returns

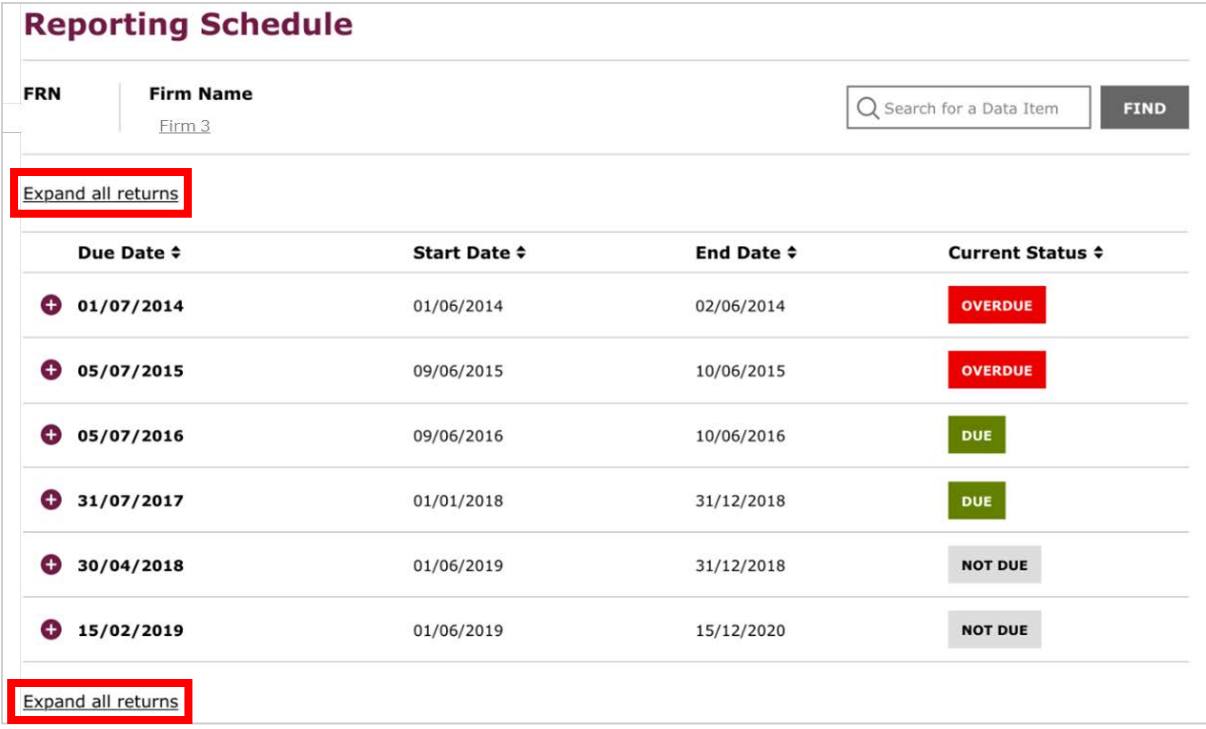
Data items due on the same date, for the same reporting period, are grouped into a ‘return’:



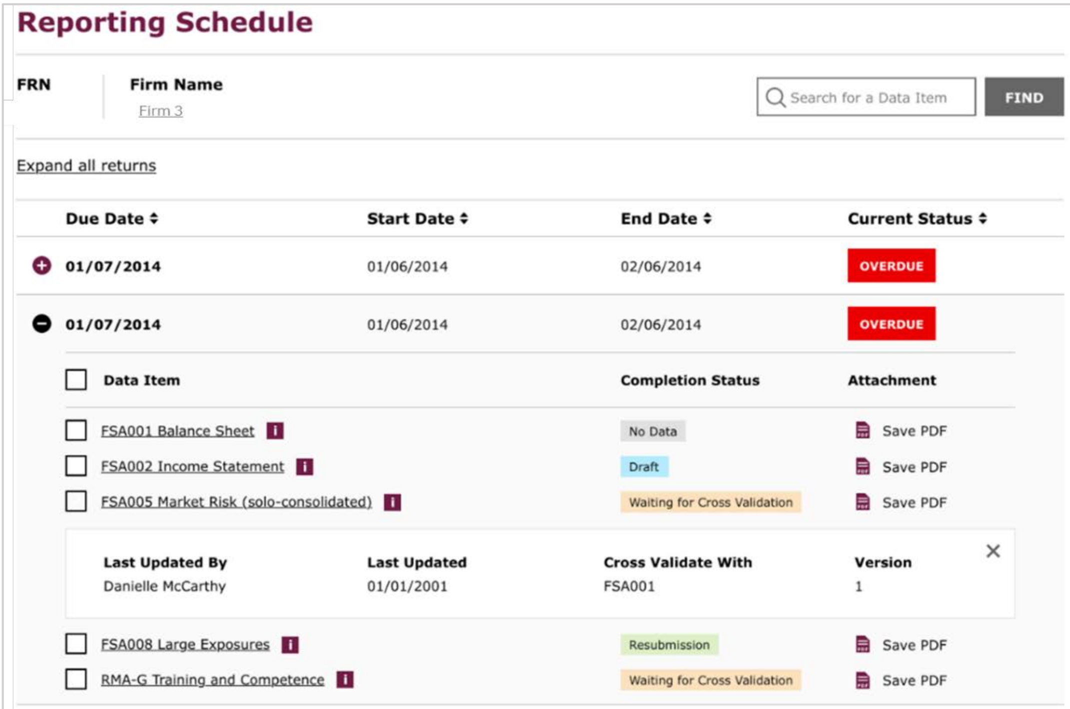
You can view data items (forms you must report on) for a return by clicking on the **+** icon:



Or you can view all data items by selecting **Expand all returns**:

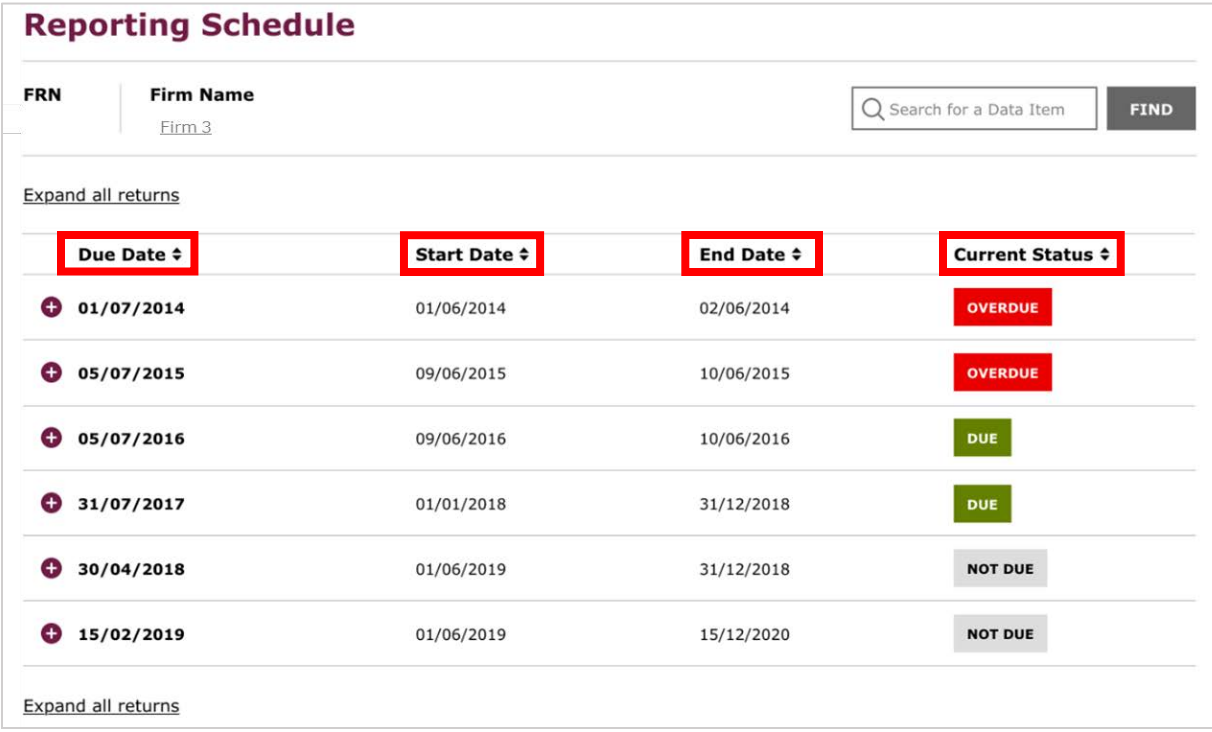


Each return lists the required data items and clicking the **i** symbol provides some related information, including the status of each data item (for example, if it's in draft state), any requirement to cross validate with other data items, and details about who made the last update and when:



3. How your schedule is structured

Your reporting schedule includes important information for completing your return:



Reporting Schedule

FRN | **Firm Name**
Firm 3

Search for a Data Item | FIND

Expand all returns

Due Date	Start Date	End Date	Current Status
01/07/2014	01/06/2014	02/06/2014	OVERDUE
05/07/2015	09/06/2015	10/06/2015	OVERDUE
05/07/2016	09/06/2016	10/06/2016	DUE
31/07/2017	01/01/2018	31/12/2018	DUE
30/04/2018	01/06/2019	31/12/2018	NOT DUE
15/02/2019	01/06/2019	15/12/2020	NOT DUE

Expand all returns

Due Date shows when you need to report by

Start Date is the beginning of the period you're reporting for

End Date is when this reporting period ends

Current Status shows whether your report is, due, not due, or overdue