

Update to Client checklist

To support the upcoming Companies House changes under ECCTA (effective **18th November**), the Client Checklist has been updated with new features:

Requesting UIDs in Client Checklists

- Go to **Filing > CS01 Confirmation Statements > Client Checklist**.
- Tick the option **“Include specific requests to include Director Personal Codes (UID)”**.

CONFIRMATION STATEMENT CHECKLIST

The CS01 is a declaration that all filing is up to date, including items which don't even appear on the form, like director details and registered office address. It is therefore INSUFFICIENT for gathering client authority to file and CS01'S SHOULD NOT BE SENT for this purpose.

This checklist gives complete information enabling the client to sign off all filing obligations

Check your data using Connections and use the Filing Centre to reveal and submit any outstanding filing before submitting a CS01.

Incorporation date	<input type="text" value="8/2/1996"/>
Last Confirmation Statement review date	<input type="text" value="9/9/2024"/>
Next Confirmation Statement review date	<input type="text" value="18/11/2025"/>
Days before filing deadline when clients are asked to return the checklist	<input type="text" value="7"/>
Options	<input type="checkbox"/> Include request for Companies House filing fee <input checked="" type="checkbox"/> Show my contact details on the checklist <input type="checkbox"/> Include specific requests to include Director Personal Codes (UID)

Automation Settings

- If checklists are sent automatically, you can set this option globally.
- Navigate to **My Office > Settings > Automation Settings (Beta) > Organisation Settings**.
- Tick **“Include specific requests to include Director Personal Codes (UID)”** to ensure UID requests are always included.

ORGANISATION AUTOMATION SETTINGS
- CLIENT CHECKLIST SETTINGS -

[Details](#)

Auto-send Client Checklist	<input type="radio"/> Do not auto-send Client Checklists <input checked="" type="radio"/> Queue checklist emails for manual approval <input type="radio"/> Automatically email Client Checklists and notify after sending <input type="checkbox"/> Display Companies House fee message on Client Checklist <input type="checkbox"/> Include specific request to return Director Personal Code in Client Checklist
Days before filing when clients are asked to return checklists	<input type="text" value="7"/>
Days before filing that checklist automatically gets emailed to client	<input type="text" value="30"/>
Auto-send reminder emails	<input checked="" type="radio"/> Automatically send reminder emails <input type="radio"/> Send reminder email if return date missed <input type="radio"/> Do not send reminder emails by default <input type="radio"/> Turn off all client reminders - overrides individual company settings.
Upcoming alert emails	<input checked="" type="radio"/> Do not send <input type="radio"/> Send to relevant Partners, Managers and Staff <input type="radio"/> Send to relevant Managers and Staff <input type="radio"/> Send to relevant Staff only <input type="radio"/> Send to specific Staff Member
Auto-send CS01 options	<input checked="" type="radio"/> Do not automatically send CS01 <input type="radio"/> Automatically send CS01 on review date upon client approval <input type="radio"/> Automatically send CS01 immediately upon approval (not recommended)

AUTOMATION EMAIL SETTINGS

How Directors Appear in the Checklist

- If the UID request box is **not ticked**, Directors who have not yet supplied UIDs will still be highlighted.

Directors

The Confirmation Statement will be available for public inspection at Companies House. You are legally bound to file your full residential address but Companies House are equally bound not to reveal it. Directors must give their country of residence though and a 'service address' which will be on the public record. You can avoid your residential address being revealed by having a service address which is different.

Name	Benjamin Bogan
Country of residence	England
Service address	4 The Building, The Street, Mytown, Countyco, CO123CO, England
Residential address	4 The Building, The Street, Mytown, Countyco, CO123CO, England
Date of birth	5/7/1980
Occupation	Company Director
Nationality	British
Director Personal Code (UID)	Director has not supplied a Personal Code (UID) for the CS01. A Personal Code must be supplied if CS01 is filed after the 17th of November 2025.

Any corrections?

Buttons: Setup Email Contacts, Download PDF, Download encrypted PDF, Cancel

If the UID request box is **ticked**, Directors without UIDs will be highlighted and a field will appear for them to enter the missing UID.

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Name	Benjamin Bogan
Country of residence	England
Service address	4 The Building, The Street, Mytown, Countyco, CO123CO, England
Residential address	4 The Building, The Street, Mytown, Countyco, CO123CO, England
Date of birth	5/7/1980
Occupation	Company Director
Nationality	British
Director Personal Code (UID)	Director has not yet supplied a Personal Code (UID) for the CS01. Please supply mandatory Personal Code for this Director in the box below.

Any corrections?

Director Personal Code (UID)

Buttons: Setup Email Contacts, Download PDF, Download encrypted PDF, Cancel