How to: ***Manage Primary/Secondary Contacts for Notifications***:

This step-by-step guidance provides information on how to manage the Primary and Secondary Contacts for Return Notifications.

To manage the primary and secondary contacts for Returns, please complete the following steps:

i. A Firm/System Administrator may appoint different ONR Users as a Primary Contact or Secondary Contact of a specific Return. Once logged in as the Firm Administrator, on the *Home Page*, select '**Administration**' as shown in figure 1.1.

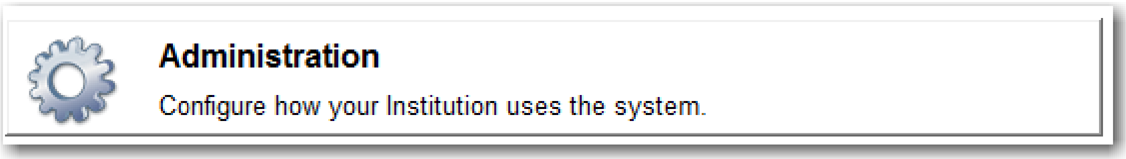

Figure 1.1

ii. On the *Institution Administration Page* in figure 1.2 select '**Manage Notifications**'.

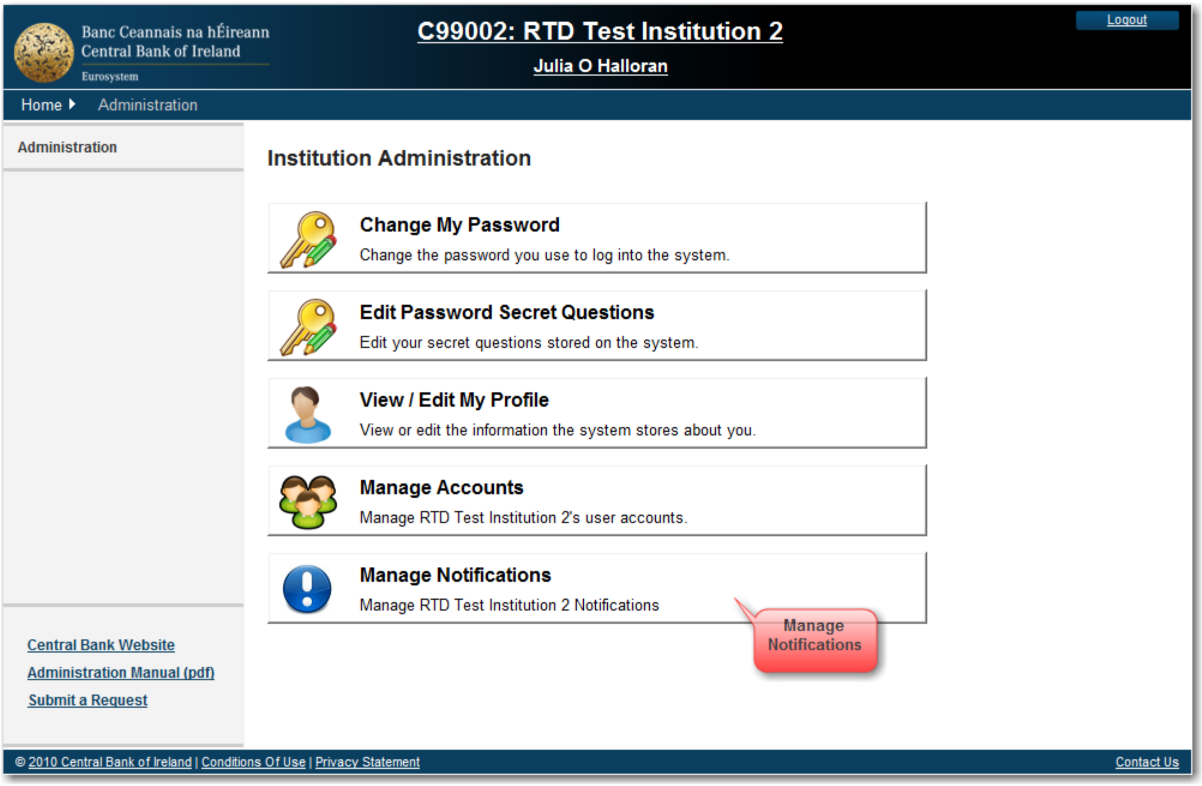

Figure 1.2

iii. On the Manage Notifications Page, shown in figure 1.3, select the '**Return Type Notification Preference**' in figure 1.4.

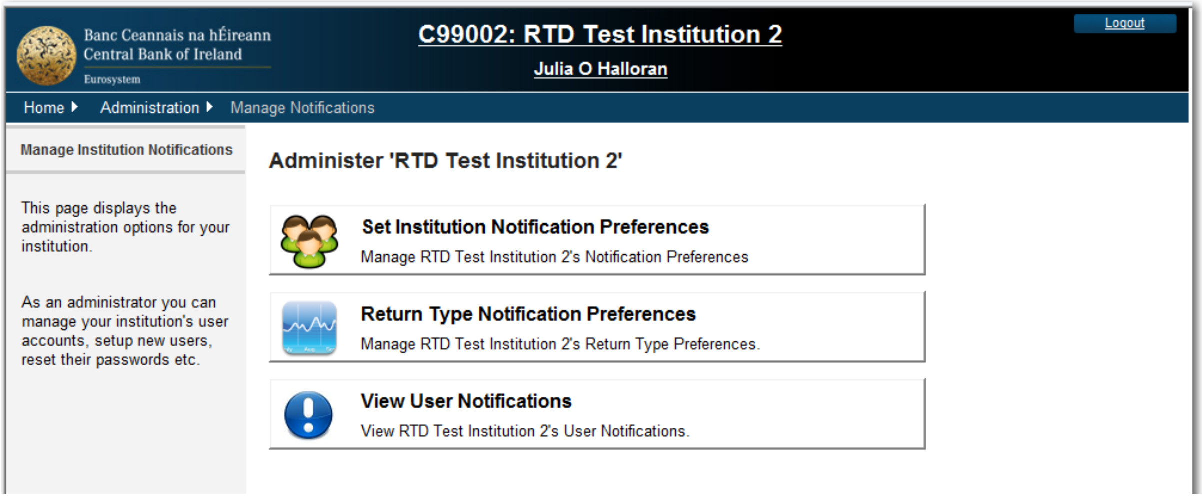

Figure 1.3

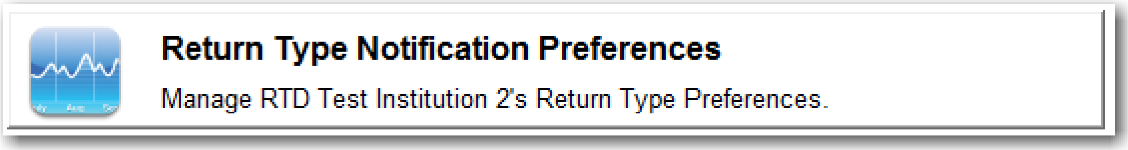

Figure 1.4

iv. Figure 1.5 shows the Return types as submitted by your Institution. Select the blue icon ‘**Edit Return Type Preferences**’ to choose which Return type to set custom notification preferences for.

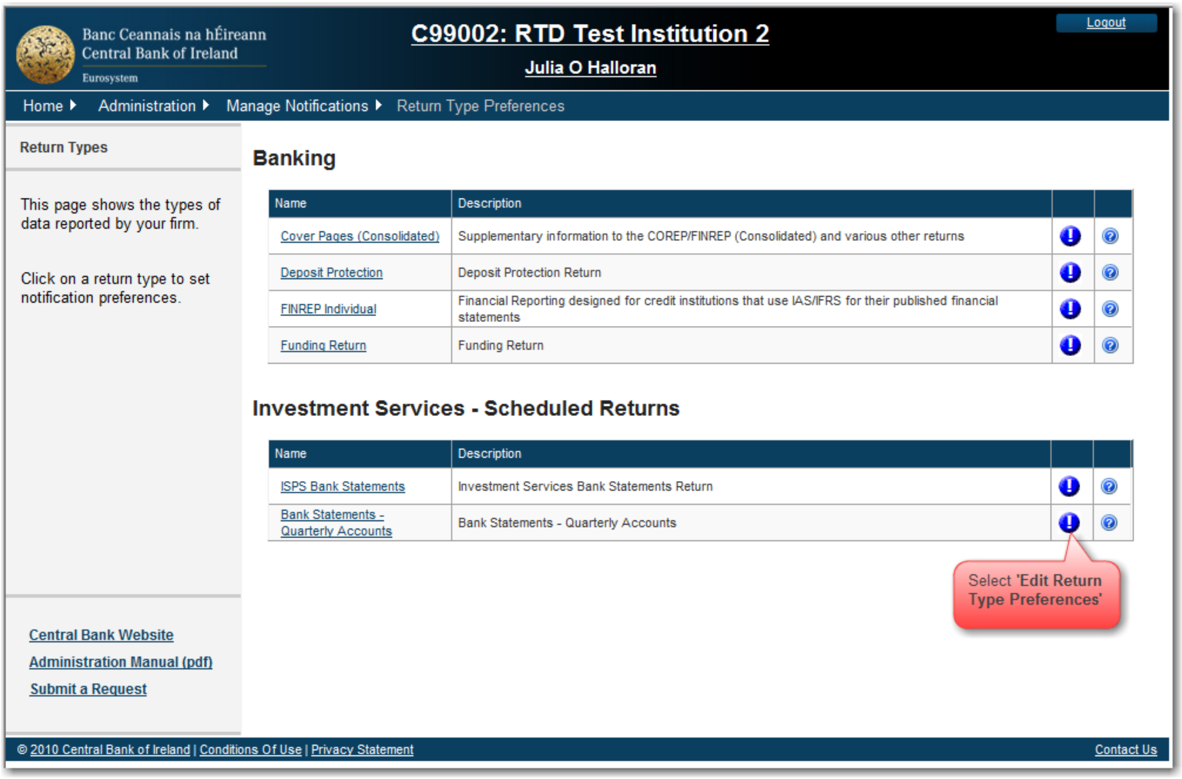

Figure 1.5

v. On this page it is possible to set the primary contact for that return. To be designated as a Primary Contact a User must be a Business Administrator for that Return type. See figure 1.6 below.

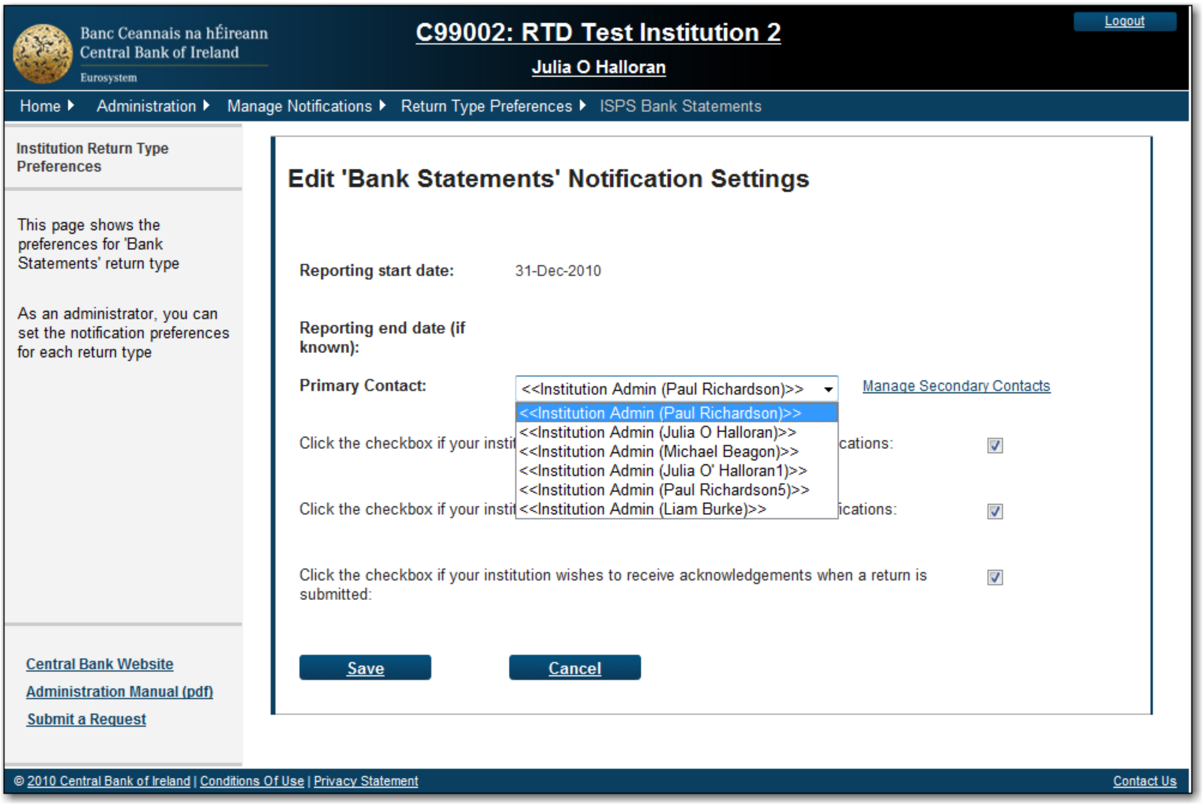

Figure 1.6

vi. To set a secondary contact, select '**Manage Secondary Contacts**'. A Secondary Contact must be a User or Business Administrator with access to that return type.

vii. On the *Manage Secondary Contacts Page* shown in figure 1.7 there is a list of secondary contacts assigned to that return type. Select the '**Add Contact'** button to add another secondary contact where necessary.

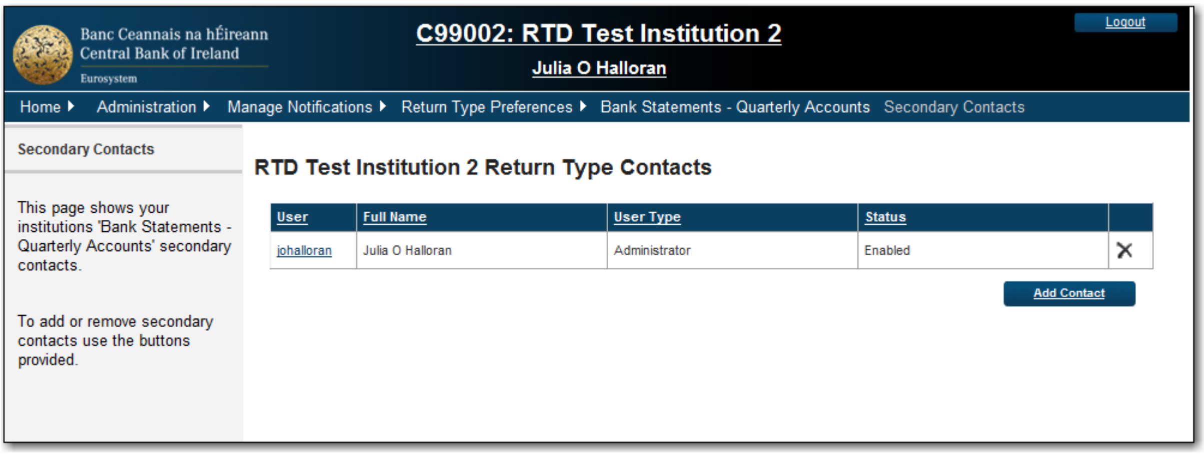

Figure 1.7