

Migrating your DT Client Portal Account

2024-08-22

Table of Contents

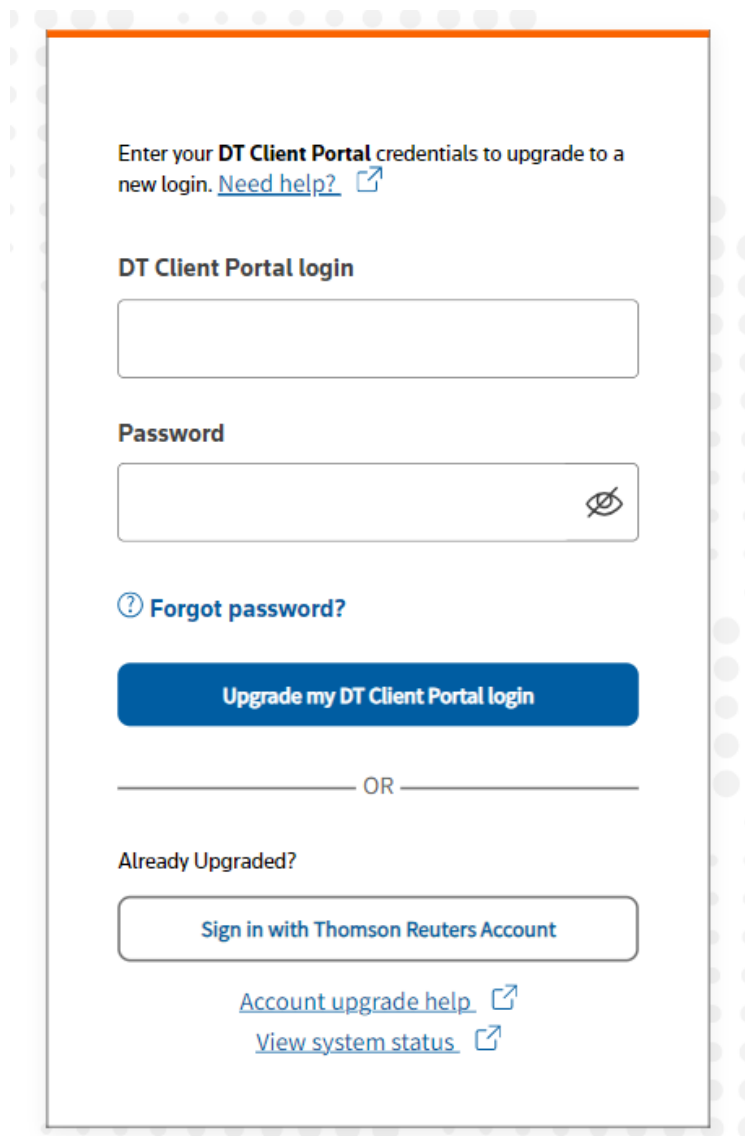
Start	2
Step 1 – Navigate to DT Client Portal	2
Step 2 – Enter you email address	4
Step 3 – Create a Thomson Reuters account	5
Step 4 – Verify the email address you provided	7
Step 5 – Sign into DT Client Portal.....	9
Step 6 – Set up two-factor authentication.....	10
Phone	11
Auth0 Guardian app.....	13
Step 7 – Copy your recovery code	15
Finish	16
Appendix A – Thomson Reuters account setup completion email.....	17
Appendix B – How to modify your two-factor authentication settings.....	17
Appendix C – Additional help	19

Start

The first time you log into your DT Client Portal account on or after **Sept. 17, 2024**, you will be able to easily migrate to using a Thomson Reuters account.

Step 1 – Navigate to DT Client Portal

Start by navigating to DT Client Portal (<https://secure.dtnetlink.ca/nextgen/>) as you normally would.



Enter your **DT Client Portal** credentials to upgrade to a new login. [Need help?](#) 

DT Client Portal login

Password



 **Forgot password?**

Upgrade my DT Client Portal login

OR

Already Upgraded?

Sign in with Thomson Reuters Account

[Account upgrade help](#) 

[View system status](#) 

Enter your DT Client Portal login and password. Don't worry if you don't see your firm's logo and information just yet. Select "**Upgrade my DT Client Portal login**" to proceed.

Enter your **DT Client Portal** credentials to upgrade to a new login. [Need help?](#) 

DT Client Portal login

Password

[? Forgot password?](#)

Upgrade my DT Client Portal login

Step 2 – Enter you email address

Next you will be prompted to create credentials for your new Thomson Reuters account. Input the email address of your choosing and click continue.

Note: If you have an **Onvio staff account**, then you already have a Thomson Reuters account associated with it. If your Onvio and DT Client Portal staff accounts are for firms with the same firm ID, then you should enter your Onvio email address here. This will link both firms to the same Thomson Reuters account and let you use the same email address when signing into either Onvio or DT Client Portal. If this is the case, then after this step is completed, your DT Client Portal account will have been migrated and you can jump to **Step 5**. Otherwise, proceed to **Step 3**.

Upgrade to a new login

We've upgraded our digital platform. To access your account, create a new login using an email address.

Enter the email you'd like to use as your new login:

Continue

Why do I have to do this? ⓘ

[Account upgrade help](#) ↗

Step 3 – Create a Thomson Reuters account

You will see the following page.

Create an account

Access your products with a single Thomson Reuters Account.

Already have an account? [Sign in](#)

All fields are required.

First name

Last name

Email

Your new password must contain:

At least 8 characters in length

At least 3 of the following:

An uppercase letter (A-Z)

A lowercase letter (a-z)

A number (0-9)

A special character (@#!, etc.)

New password



Set your new password, ensure that your preferred language is selected, agree to the terms of use, and click Continue.

Your new password must contain:

At least 8 characters in length

At least 3 of the following:

An uppercase letter (A-Z)

A lowercase letter (a-z)

A number (0-9)

A special character (@#!, etc.)

New password

Confirm new password

Preferred language

English (CA) ▼

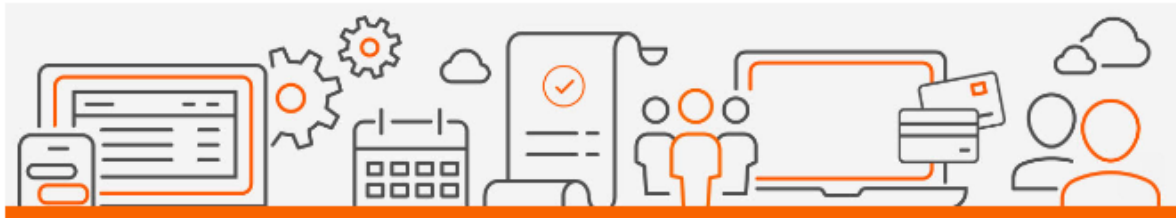
☐ I agree to the [terms of use](#) 

Continue



Step 4 – Verify the email address you provided

Before the account migration is complete, you will need to verify your email address. An email containing a verification code will be sent to you.

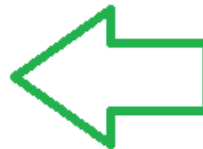


Verify your Thomson Reuters account

Hi [REDACTED]

Thanks for signing up for a Thomson Reuters account. Your verification code is listed below. Enter this code on your sign-in page to complete set up.

82055



Thanks,
Thomson Reuters



Enter the provided code and create your account.



Verify email

We've sent a 5-digit code to your email

 Verify

your email by entering the code below. Once verified your account will be created.

Verify your 5-digit code [Resend code](#)

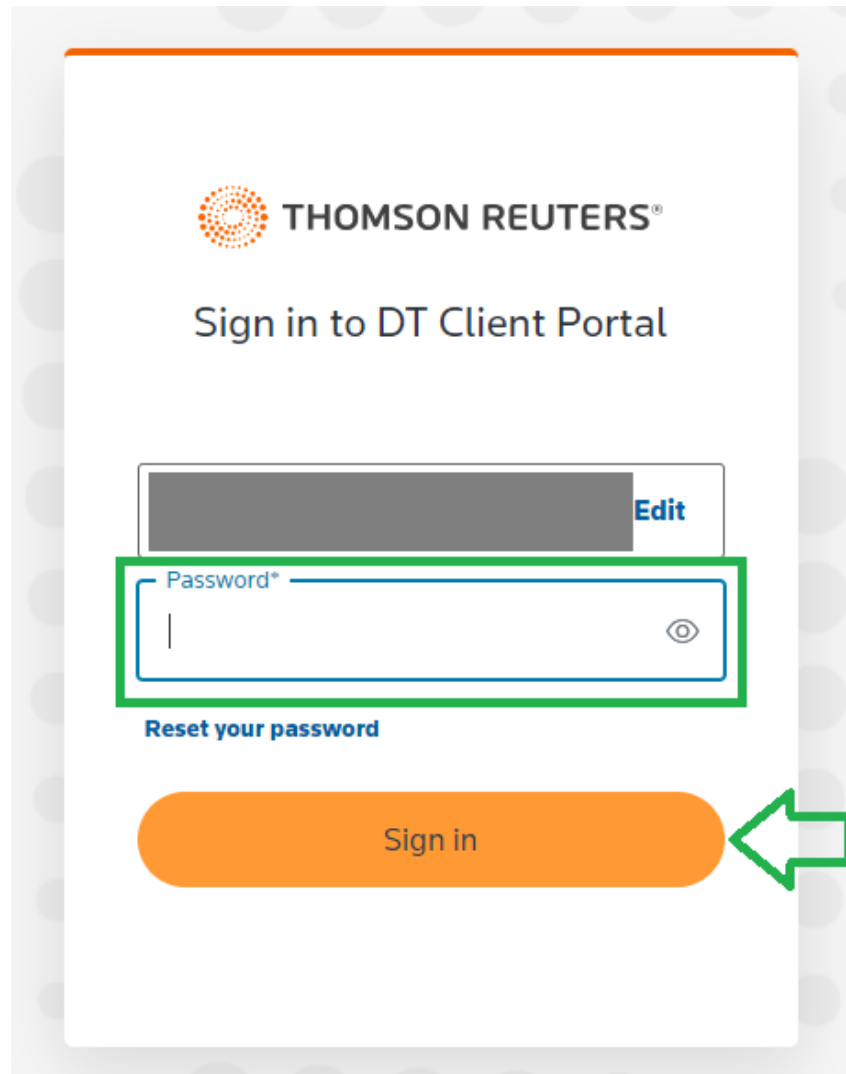
Code is valid for 2 hours.

Create account



Step 5 – Sign into DT Client Portal

At this point, your account has been migrated and you will be directed to the login screen.



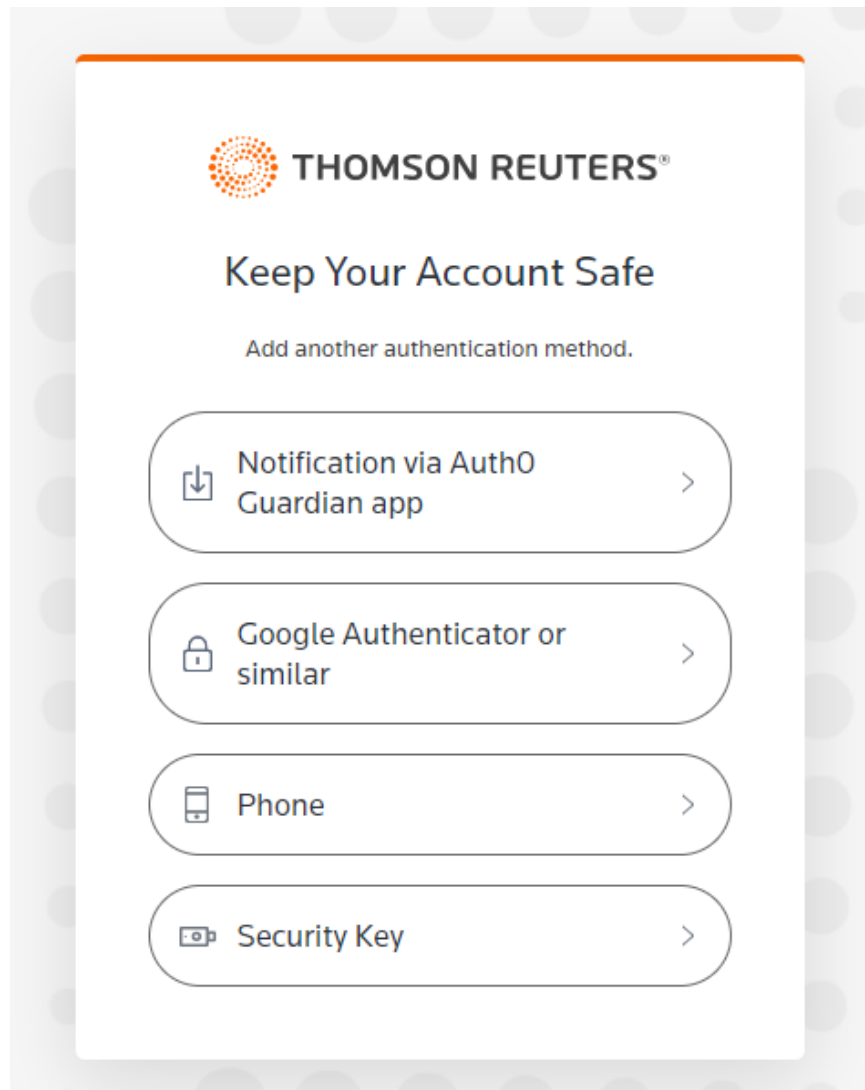
The image shows the Thomson Reuters DT Client Portal login screen. At the top is the Thomson Reuters logo, consisting of an orange circular icon with dots and the text "THOMSON REUTERS®". Below the logo is the heading "Sign in to DT Client Portal". There are two input fields: a greyed-out email field with an "Edit" link to its right, and a "Password*" field with a green border and a toggle eye icon. Below the password field is a blue link that says "Reset your password". At the bottom is a large orange "Sign in" button, which is pointed to by a green arrow from the right.

Sign in using the Thomson Reuters account credentials that you just set up.

Note: If you used an Onvio staff email address in **Step 2**, and you have already set up two-factor authentication for your Onvio account, then you are done and can jump to the **Finish**. Otherwise, proceed to **Step 6**.

Step 6 – Set up two-factor authentication

Your account needs to have two-factor authentication enabled. This adds an additional layer of identity verification, increasing your protection.



There are several options available. You can use the Auth0 Guardian mobile app, which is free on the Apple [App Store](#) and [Google Play](#) store for Android. Alternatively, you can set up Google Authenticator or a similar authenticator software, receive a code via text message or phone call, or use a security key such as hardware token or biometric.

For this document, we will show two possible options: phone and Auth0 Guardian app.

Phone

Select “**Phone**,” enter your phone number, and choose text message or voice call to receive your code. We’ll choose text message and then select “**Continue**.”

 **THOMSON REUTERS®**

Secure Your Account

Enter your country code and phone number to which we can send a 6-digit code:

 Canada, CA, +1 >

Enter your phone number

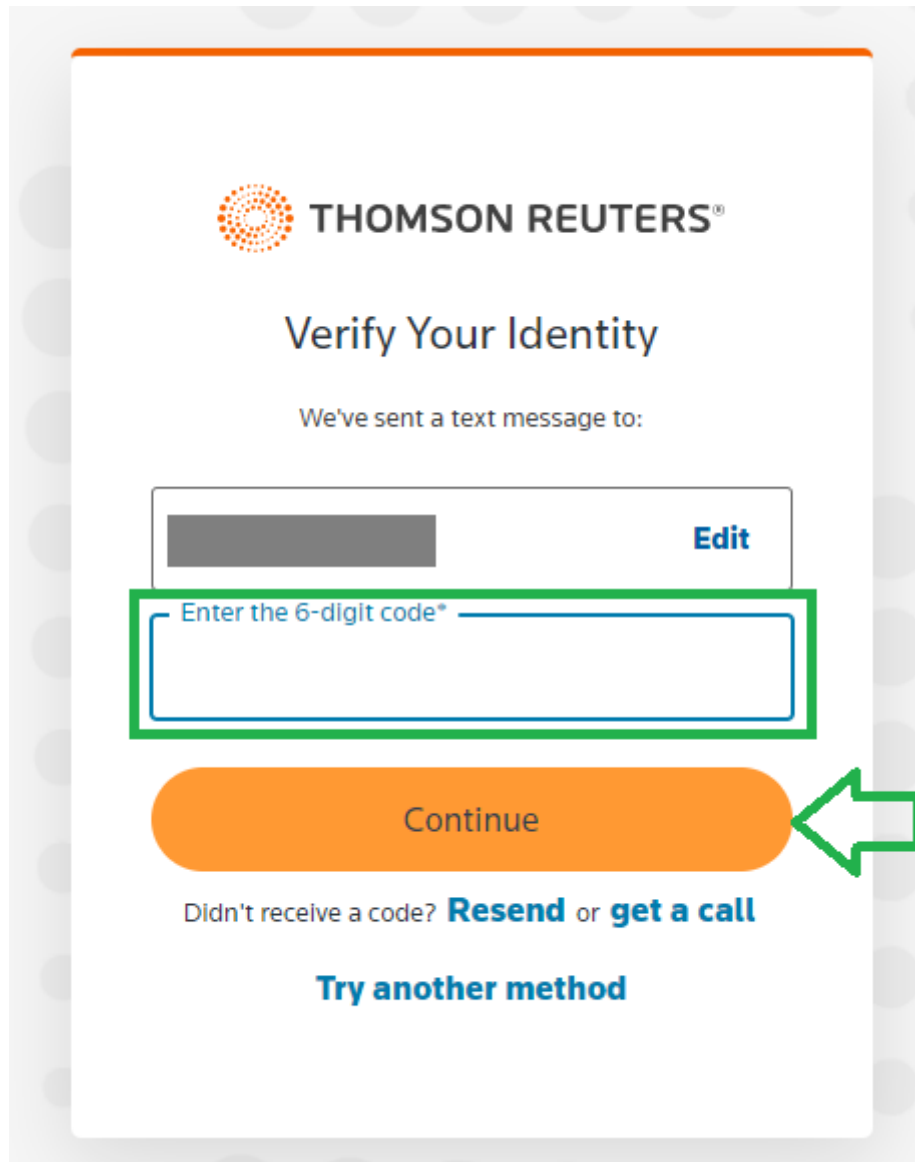
How do you want to receive the code?

☒ Text message ☐ Voice call

Continue

[Try another method](#)

Enter the six-digit code that you received in the text message and select “**Continue.**”



The image shows a mobile app screen for Thomson Reuters identity verification. At the top is the Thomson Reuters logo. Below it is the title "Verify Your Identity". A message states "We've sent a text message to:" followed by a greyed-out phone number and an "Edit" link. A text input field is labeled "Enter the 6-digit code*" and is highlighted with a green border. Below the input field is an orange "Continue" button, which is also highlighted with a green arrow pointing to it from the right. At the bottom, there are links for "Didn't receive a code? Resend or get a call" and "Try another method".

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Verify Your Identity

We've sent a text message to:

[Redacted Phone Number] [Edit](#)

Enter the 6-digit code*

[Continue](#)

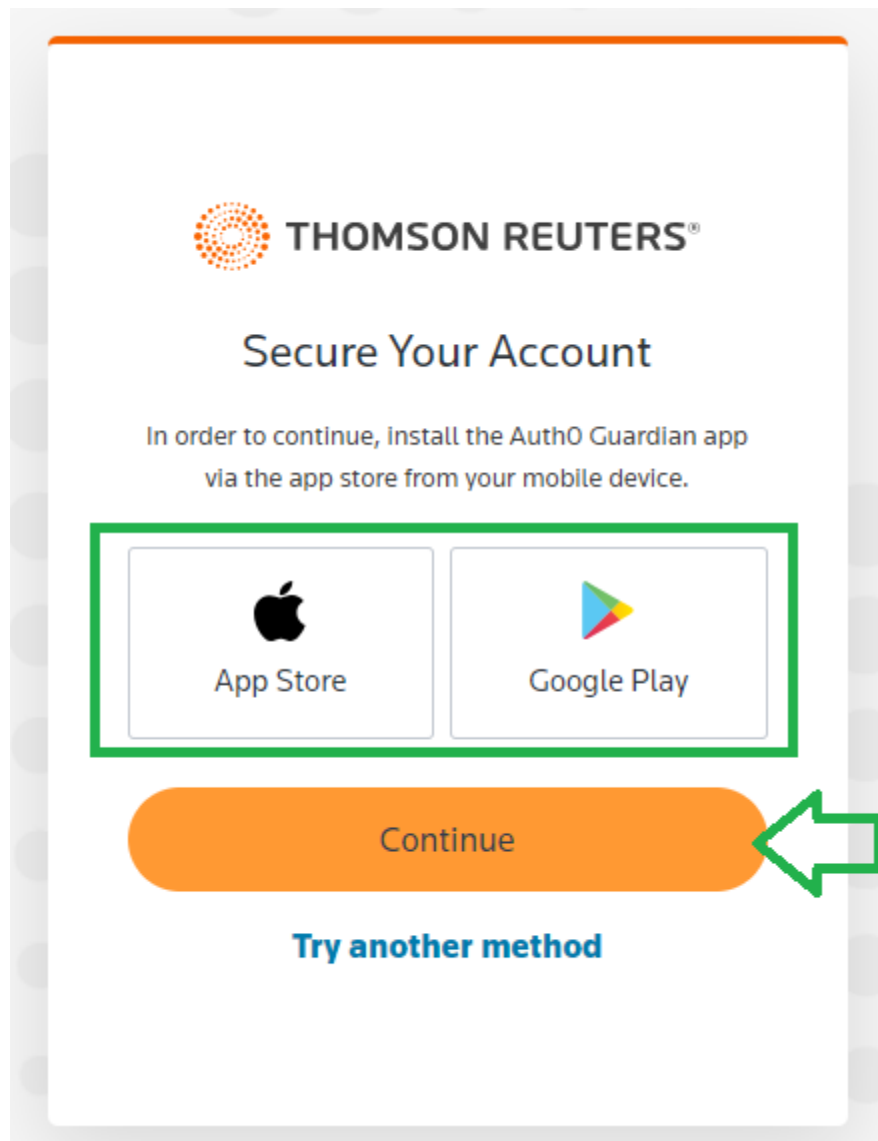
Didn't receive a code? [Resend](#) or [get a call](#)

[Try another method](#)

For every subsequent sign-in, you will be notified on your phone and will need to enter the six-digit code you receive.

Auth0 Guardian app

Download the app from either the Apple [App Store](#) or [Google Play](#), and select “**Continue.**”



Scan the QR code using the Auth0 Guardian app on your smartphone or tablet.

 **THOMSON REUTERS®**

Secure Your Account

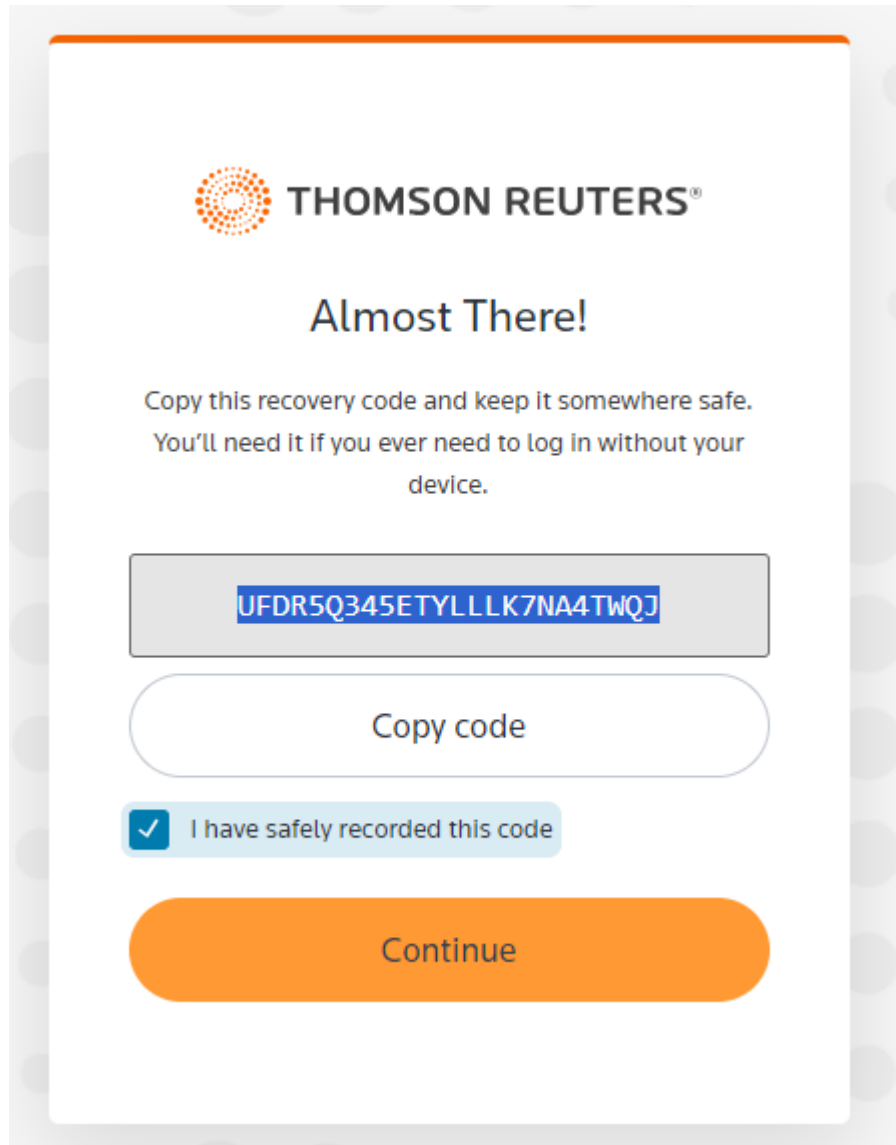
Scan the QR Code below using the Auth0 Guardian app on your mobile device.



[Try another method](#)

Step 7 – Copy your recovery code

No matter which verification option you chose, if you ever need to sign in without your device, you will need to enter the recovery code.

A screenshot of a mobile application screen for Thomson Reuters. At the top is the Thomson Reuters logo, consisting of an orange circular icon with dots and the text "THOMSON REUTERS®". Below the logo, the heading "Almost There!" is displayed in a large, dark font. Underneath the heading, there is a block of text: "Copy this recovery code and keep it somewhere safe. You'll need it if you ever need to log in without your device." Below this text, a grey rectangular box contains the recovery code "UFDR5Q345ETYLLK7NA4TWQJ" in blue text. Below the code box is a white button with rounded corners and a thin grey border, labeled "Copy code". Below the button is a checkbox that is checked, with the text "I have safely recorded this code" to its right. At the bottom of the screen is a large, orange button with rounded corners labeled "Continue".

 **THOMSON REUTERS®**

Almost There!

Copy this recovery code and keep it somewhere safe.
You'll need it if you ever need to log in without your device.

UFDR5Q345ETYLLK7NA4TWQJ

Copy code

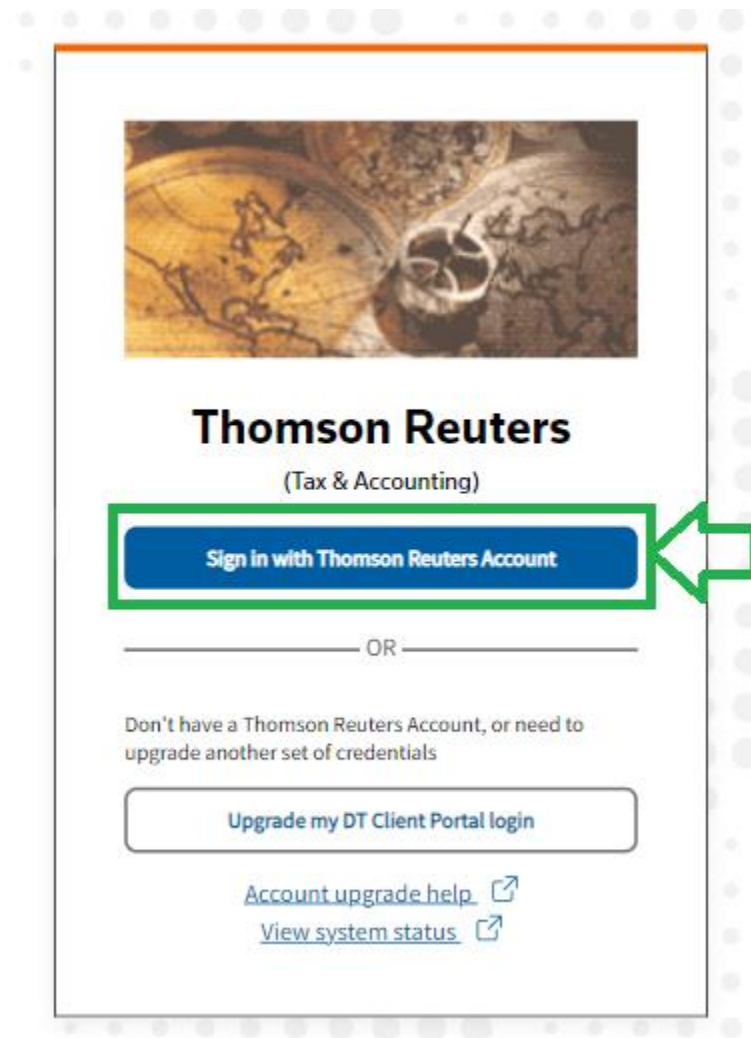
☒ I have safely recorded this code

Continue

You should copy this code and store it somewhere safe.

Finish

Once this setup has been completed, you will sign in to DT Client Portal using your Thomson Reuters account going forward. Be sure to select **“Sign in with Thomson Reuters Account.”**



Appendix A – Thomson Reuters account setup completion email

You will receive an email verifying that the provided email address is now associated with your Thomson Reuters account.

Hi [REDACTED]

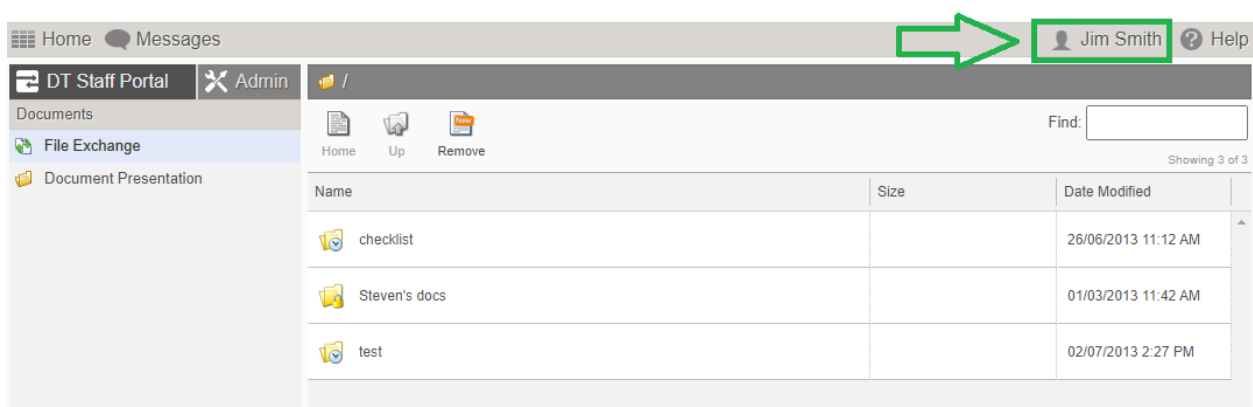
You have successfully added DT Client Portal to your Thomson Reuters account. The email address [REDACTED] is now associated with your account. You can now [sign in using your Thomson Reuters Account](#).

Thank you for using DT Client Portal.

Thomson Reuters

Appendix B – How to modify your two-factor authentication settings

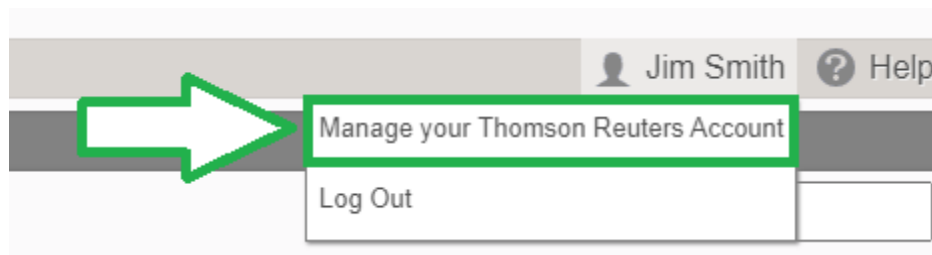
If you ever need to modify two-factor authentication settings, navigate to your profile, by clicking your name in the top right corner.



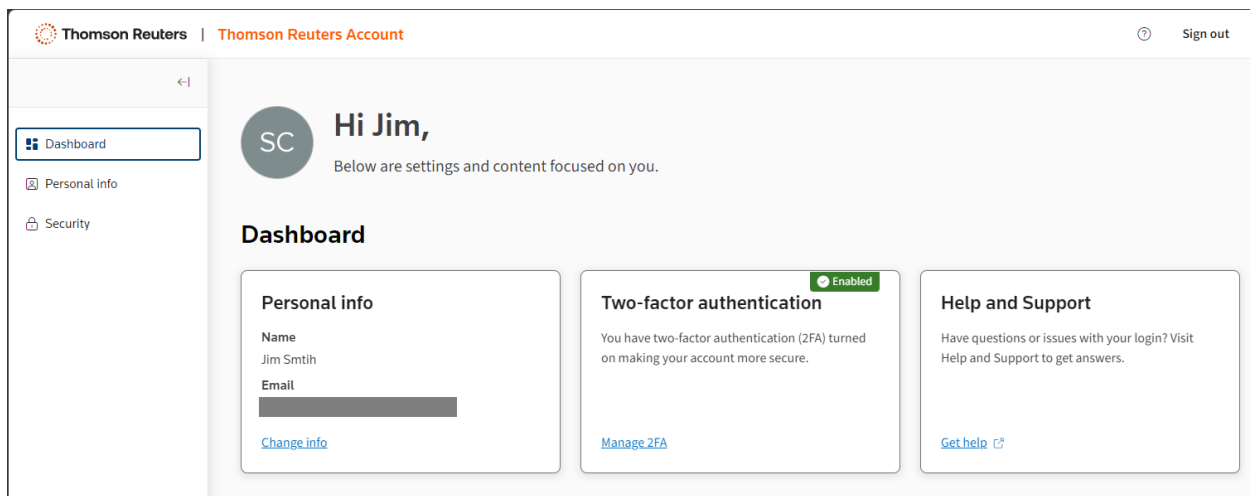
The screenshot shows the DT Staff Portal interface. In the top right corner, the user's name 'Jim Smith' is displayed next to a help icon. A green arrow points to this name, indicating where to click to access profile settings. The interface includes a navigation bar with 'Home' and 'Messages', a sidebar with 'DT Staff Portal' and 'Admin', and a main content area with a 'Documents' section. The 'Documents' section shows a list of files: 'checklist', 'Steven's docs', and 'test'.

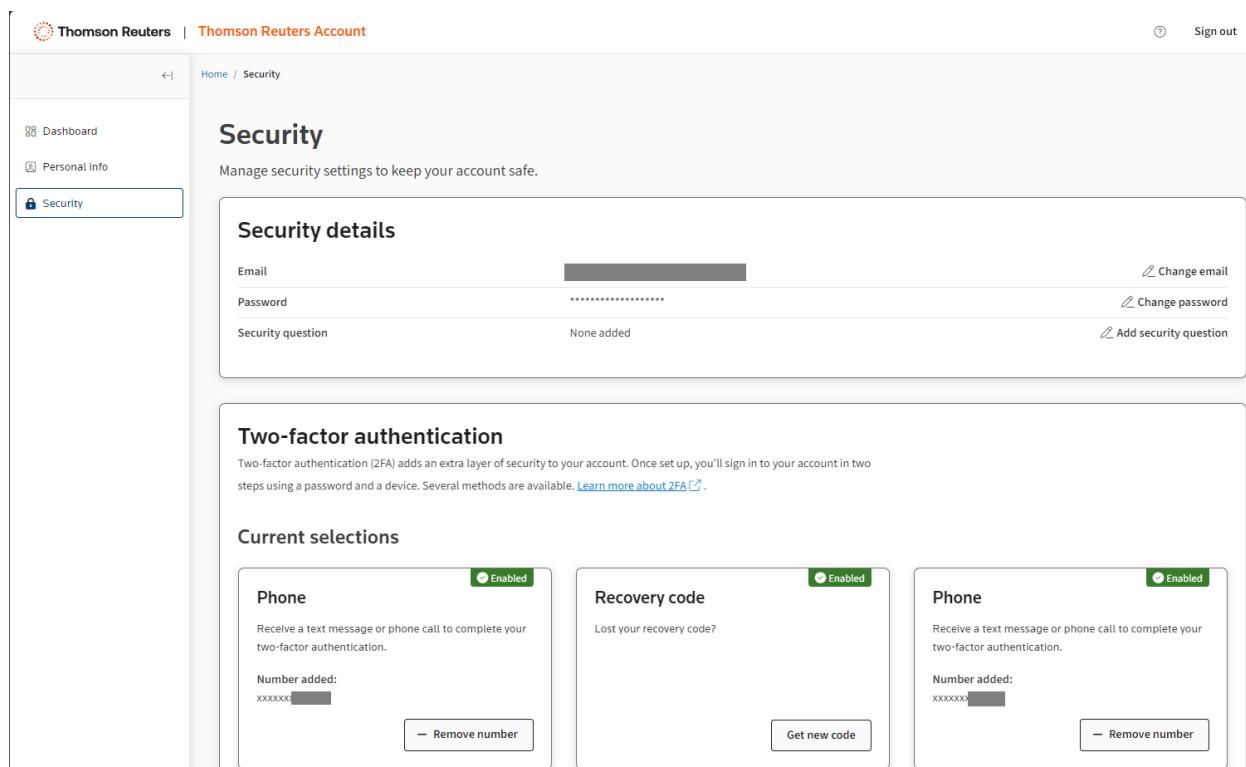
Name	Size	Date Modified
checklist		26/06/2013 11:12 AM
Steven's docs		01/03/2013 11:42 AM
test		02/07/2013 2:27 PM

Then select **“Manage your Thomson Reuters Account.”**



Here you can generate a new recovery code and add additional methods of verification if you would like. Note that the email address associated with your account will automatically be set up as a secondary option in case do not have access to your mobile device.





Appendix C – Additional help

[Thomson Reuters Account](#) help page

This page contains links to many helpful articles.