



Confirmation

The latest in Confirmation: faster, smarter, more secure

The new version of Confirmation provides a fast, easy, and secure way to send and receive confirmations to anyone, anywhere in the world. As part of our ongoing efforts to improve your experience, we are rolling out upgrades to all customers on a continuous basis. With this upgrade, you can enjoy a seamless and improved experience and take advantage of the latest features and functionality that Thomson Reuters® Confirmation has to offer.

Explore the upcoming updates

- **Productivity enhancement:** Boost efficiency with improved guided workflows and client sharing.
- **Comprehensive dashboard:** New dashboard enables quick actions, bulk uploads, Open Banking integration.
- **Efficient team collaboration:** Collaborate on shared clients without changing permissions.
- **Streamlined client authorization:** Automated client authorizations integrated into Confirmation tracking.
- **API integration made easy:** Access OpenAPI documentation and Developer Experience Portal for easier integration.

What's coming in 2025 and 2026?

Check out our 2025/2026 roadmap to learn about upcoming enhancements and new developments.

Requester

	H2 2025
 Improved Guided Workflow	Users experience a 45% increase in efficiency on average, saving 17 clicks, when adding clients, entering accounts, requesting authorization, and initiating confirmation requests.
 Confirmations at a Glance Dashboard	The home page features a detailed confirmations table that offers quick actions to enhance visibility, filtering, sorting, and downloading of confirmations.
 Email notifications link directly to requests	No more searching required. Email notifications now include a direct link to the confirmation, taking you straight to the relevant record when an activity is completed, marked as NMI, or denied.
 Extended Out of Network Response Window	The response window has been extended to 60 days , and additional reminders can be sent to responders before a request is marked as no-response.
 Client Sharing Simplified	Shared auditors and team members can now collaborate more efficiently. They can add accounts, request authorization, and submit requests without needing to change their permissions, streamlining the workflow for shared clients.
 Enhanced Client Access	Auditors can now search and request access to any client within a firm, eliminating duplicate records and streamlining client management.

Requester

	H2 2025
 Follow-up Automation	With automated email reminders, authorizers with outstanding authorization requests will be prompted to respond in a timely manner, freeing up auditors to focus on higher-priority tasks.
 Multi-Factor Authorization (MFA)	Strengthens security, offering robust protection and secure access to critical data on the Confirmation platform.
	H1 2026
 Open Banking Integration	With Open Banking now part of the Confirmation UI, auditors can easily request and track consent, and download transaction files, making audits more thorough. Next, we'll introduce the bank feed with AI Test to automate transaction matching, increasing audit efficiency.
 Open Banking API	Streamlines the auditor experience, allowing more direct connection between audit firm systems and client transactional data.
 Responder Recall	By implementing the Responder Recall feature, banks can easily recall confirmations to amend errors or include missing information, enhancing the reliability of financial communications.
 Archive Client	Archive Client allows auditors to maintain an organized client list by archiving clients who are no longer serviced, facilitating better management and clarity.

Responder

	H2 2025
 Bulk File Upload	Responders can now attach multiple files (up to 30MB each), double the previous limit) to a confirmation response with a simple drag-and-drop, resulting in up to 90% time savings when uploading multiple files.
 Customizable Form Fields	Form fields can now be tailored to each bank's specific needs, enabling more precise confirmation requests and allowing customized changes to be applied 70% faster.
 Unified Confirmation View	Responders can now view all confirmations and access top-level stats across multiple departments with a single click, increasing visibility into outstanding work and enabling more efficient workflows without the need to run reports.

Key enhancements you may have missed:

**2024**

Simplified Access to Client Historical Data: introduced a new request and approval workflow that allows you to easily access historical data from past clients without leaving the application.

API Enhancements:

- **For banks:** Asset verification APIs and support for future-dated requests via API.
- **For firms:** New API capabilities for an enhanced confirmation experience, featuring native services and an event-driven architecture.

**2023**

Security and Compliance

- Annual SOC 1 and SOC 2 audits
- ISO/IEC 27001:2013 certification
- Annual PCI-DSS compliance assessments

Streamlined Search

- Quickly find what you need with our simplified search functionality, featuring search by request ID directly from the primary dashboard

Accessibility Matters

- Our Asset Verifications are designed to be accessible for all customers, as part of ongoing efforts by Thomson Reuters to ensure inclusivity

Experience Confirmation

To learn more, visit:

confirmation.com

Or call **800.968.8900**

