



# Owner – User Guide

## Adding and Removing Partners

26<sup>th</sup> June 2017  
v.1

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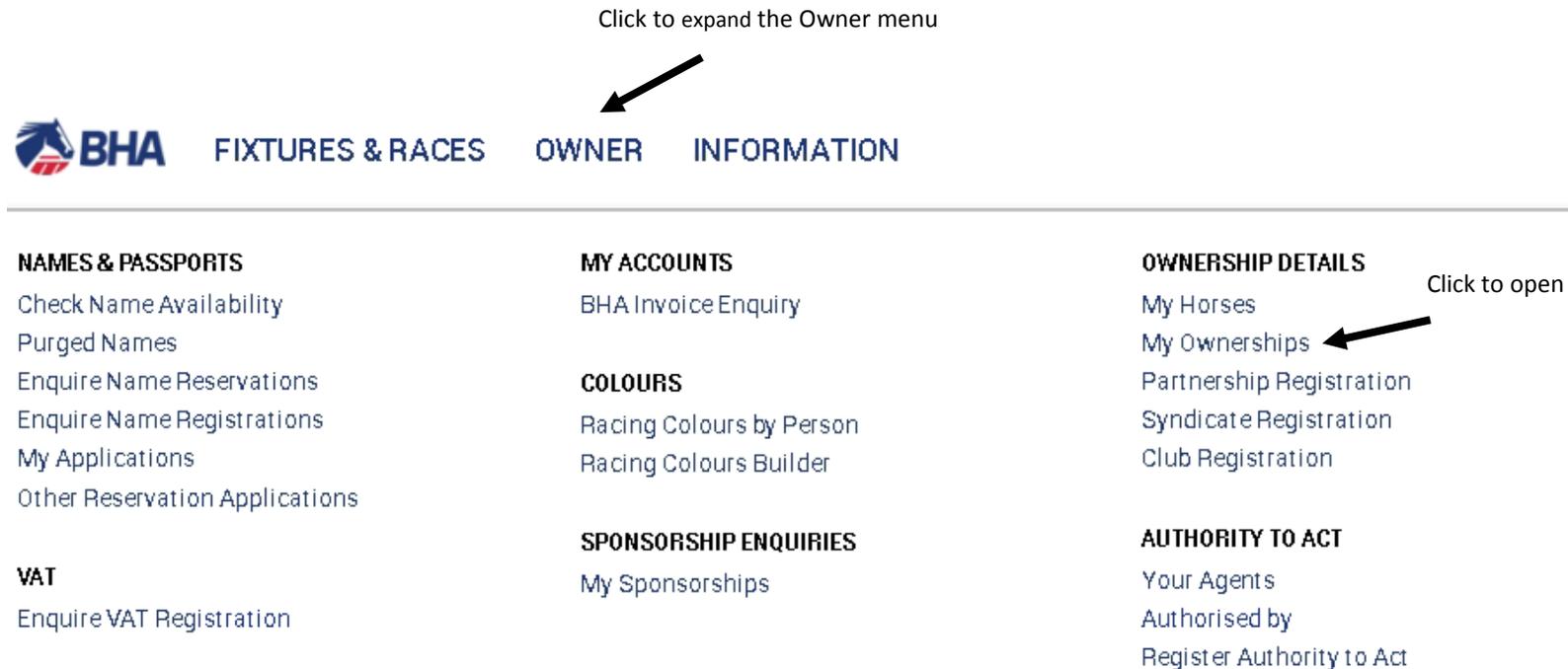
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# User Guide – Adding and Removing Partners

## 1. Selecting your Partnership

- Click “Owner” on the menu at the top of the screen, this will display a list of options.
- Then click “My Ownerships”

Click to expand the Owner menu



The screenshot shows the BHA website navigation menu. The 'OWNER' menu item is highlighted, and an arrow points to it with the text 'Click to expand the Owner menu'. Below the navigation bar, the 'OWNER' menu is expanded, showing three columns of options. The 'OWNERSHIP DETAILS' column is highlighted, and an arrow points to 'My Ownerships' with the text 'Click to open'.

**BHA**    **FIXTURES & RACES**    **OWNER**    **INFORMATION**

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<b>NAMES &amp; PASSPORTS</b> Check Name Availability Purged Names Enquire Name Reservations Enquire Name Registrations My Applications Other Reservation Applications	<b>MY ACCOUNTS</b> BHA Invoice Enquiry	<b>OWNERSHIP DETAILS</b> My Horses My Ownerships Partnership Registration Syndicate Registration Club Registration
<b>VAT</b> Enquire VAT Registration	<b>SPONSORSHIP ENQUIRIES</b> My Sponsorships	<b>AUTHORITY TO ACT</b> Your Agents Authorised by Register Authority to Act

### 1.1 My Ownerships

- This screen will display all your current registrations.
- You can use the filters at the top of the screen to display only certain ownership types, e.g. Partnerships
- Select the ownership type and then click “Refresh” to filter your ownerships.

# User Guide – Adding and Removing Partners

Click to select Ownership type

MY HORSES MY OWNERSHIPS PARTNERSHIP REGISTRATION

Click to display results

REGISTERED PENDING

Sole  Partnership  Syndicate  Company  Club

Q: Input all or part of an ownership name

REFRESH

Ownership Name	Date Registered	Type	
<b>Partnership 1</b> PINK, YELLOW stars, MAGENTA sleeves, ORANGE cap	11/12/2000	PARTNERSHIP	HIT ✓
<b>Partnership 2</b> PURPLE stars, GREEN sleeves, CERISE cap	06/02/2015	PARTNERSHIP	HIT ✗
<b>Partnership 3</b> ORANGE, PINK sleeves, BLUE cap <span>Shared</span>	02/03/2015	PARTNERSHIP	HIT ✓
<b>Partnership 4</b> BLUE, DARK GREEN stars.	11/12/2015	PARTNERSHIP	HIT ✓

- You will be able to see if the ownership has any horses in training from the HIT badge, this will be red if no horses in the ownership are in training and will display as green if they are.
- You can also see the first set of colours registered to the ownership here.
- To select a Partnership to view more details, click anywhere on the row of the desired Partnership.

# User Guide – Adding and Removing Partners

## 1.2 Owner's Details

- This screen allows you to see further information regarding your Partnership including:
  - Ownership type – Partnership (displayed as an orange badge)
  - Registered owner status, start and end dates
  - Racing Name
  - ROA membership status, start and end dates
  - Fee alignment date
  - Partnership(s)
- From this screen, you can access the “show more” button in the top right hand corner, clicking here will provide you with a list of options including “Add/Remove Partners”.

**Partnership 1**  
A1X XX X. XXXXXXX, A2XXXXXXXXXXXX.00, A300000 XXXXXXXX

**DETAILS** HORSES OWNED OWNERSHIPS COLOURS AUTHORITY TO ACT SPONSORSHIPS VAT

Owner details

Ownership type: **PARTNERSHIP**

Registered owner: Yes

Registration date: 11/12/2000

ROA member: No

Start date:

Fee Alignment Date: 11/12/2017

Racing name: Partnership 1

End date:

End date:

Contact details

- Change Partnership name
- Add/remove partners
- Update ownership percentages

Partners

- Mr A. Owner
- Mr B. Owner

ROA X

ROA ✓

Click to add or remove partners

## 2. Remove Partners

- This is the first step in the Add & Remove partners process.
- If you do not wish to remove anyone from the partnership, you can skip this step by clicking “Continue”.
- This screen will allow you to deselect any of the current partners.

Partnership 1  
A1X XX X. XXXXXXXX, A2XXXXXXXXXXXX.00, A300000 XXXXXXXX

1. Remove partners   2. Select partners   3. Add partners   4. Update name   5. Update percentages   6. Review details   7. Receipt

**PLEASE NOTE:**  
A charge will be made for each individual amendment to the Partnership.  
If you are making several changes you should perhaps consider creating a new Partnerships. For a list of our current fees please click [here](#)

**i** Please de-select any Partners you wish to remove or click CONTINUE to skip this step.  
PLEASE NOTE: You are responsible for advising HMRC of any changes to the Partner list if all/part of the Partnership is VAT registered.

**Partners**

Mr A. Owner	<input checked="" type="checkbox"/>
Mr B. Owner	<input type="checkbox"/>

Click to select for removal

Click again to add them back

**CONTINUE**   **CANCEL**

## User Guide – Adding and Removing Partners

- Select the person(s) you wish to remove by clicking the tick to the right of the person.
- The tick will disappear to show that they have been selected for removal.
- You will not be able to continue if:
  - You remove yourself from the Partnership
  - You remove all the partners – at least one partner should remain. If you wish to remove all the partners, it may be best to register a new Partnership.
- Each amendment will be charged, if you are making more than three amendments, it may be more cost effective to register a new partnership.
- If you wish to amend your decision, you can click the tick, and this will remove it and the person will no longer be removed.
- Once you are happy with your selection, click “Continue” to move to the next screen.
- If you no longer wish to remove anyone from the Partnership, click “Cancel”.
- A pop up will be displayed asking you to confirm that you wish to cancel:
  - Click “Yes” to return to owner’s details
  - Click “No” to return to the current screen.

### 2.1 Entries and Declarations

- If the partnership has any horses in ownership with a declaration, you will not be able to make any changes to the partnership. Please contact Weatherbys who will be able to make these changes on your behalf where possible.
- A warning in a red banner will display advising you of the horse name, race, and date of the declaration.
- If one of the horses has an entry, you will be able to continue but you may need a transfer of engagement for the existing entry to be transferred to the new partners or partnership name.
- This will be displayed in an orange banner advising of the horse name, race, and date.



There are Horses in this Ownership that have Entries.  
Horse 1 (GB) at SANDRINGHAM STKS on 21/06/2017  
Horse 2 (GB) at HAMPTON COURT STKS on 22/06/2017

### 3. Select Partners

- This is the second step of the add and remove partners flow.
- This screen will display all the people who you have a link to either through an existing ownership, an authority to act, or if you are a trainer, if the person has a horse in your yard.
- It will only display:
  - Individuals
  - Companies
  - Syndicates
  - Clubs
- You will not be able to add another existing partnership into a new partnership.
- If the person you wish to add is not in this list, or you do not wish to add any one to the partnership at all, you can skip this step by clicking continue.
- There must be at least two partners in the partnership to complete the process.

# User Guide – Adding and Removing Partners

**Partnership 1**  
A1X XX X.XXXXXXXXXX.A2XXXXXXXXXXXX.00.A300000XXXXXXXXXX

1. Remove partners **2. Select partners** 3. Add partners 4. Update name 5. Update percentages 6. Review details 7. Receipt

**ⓘ** This is a list of people, syndicates, clubs and companies that you have ownership links with. Please select from the list provided by ticking the correct box. If the partner you wish to add is not in this list, please add them manually in the next step.

**Partners to be added**

Search:

Name	Current ownerships (max 2 displayed)	Select
Complete Club 1		<input type="checkbox"/>
Complete Racing Club 2		<input checked="" type="checkbox"/>
Complete Racing Club 3		<input type="checkbox"/>
Complete Racing Club 4		<input type="checkbox"/>
Mr B. Owner		<input type="checkbox"/>
Mr T. Rainer		<input type="checkbox"/>
Syndicate 1		<input type="checkbox"/>
Company Limited		<input type="checkbox"/>
Mr O. Owner		<input type="checkbox"/>
Syndicate 2		<input type="checkbox"/>

**Remaining partners**

Mr A. Owner

- You can use the search to refine the list and search for specific people or ownership, click in the field and enter the full or partial name of the person or ownership you are looking for.
- The list will then display any matches to your criteria. To expand the list again, just remove the text from the search box.
- If there are no matches found, this will be displayed on screen.

# User Guide – Adding and Removing Partners

## Partners to be added

Search:

Name	Current ownerships (max 2 displayed)	Select
No matching records found		

- You can select multiple people to be included in the partnership.
- The list at the bottom of the screen will display the current partners in the partnership minus any that have been selected for removal.
- If you wish to go back to step 1 at any point, please click the relevant step on the progress bar.



- Once you have selected all the desired people, please click the “Continue”.
- If you do not wish to continue with maintaining the partnerships, please click “Cancel” and confirm to return to the owner’s details screen.

## 4. Add Partners

- This is three of the add and remove partners process.
- This screen will allow you to enter the details for people that do not appear in the previous step.
- You can add details for an individual (on the left) and for companies, syndicates, and racing clubs (to the right).

# User Guide – Adding and Removing Partners

**Partnership 1**  
A1X XX X. XXXXXXX, A2XXXXXXXXXXXX.00, A300000 XXXXXXX

1. Remove partners ✓ 2. Select partners ✓ 3. Add partners ○ 4. Update name ○ 5. Update percentages ○ 6. Review details ○ 7. Receipt ○

**i** Please enter the details of each partner and click ADD PARTNER to save them to the list. Click CONTINUE once all partners have been added or to skip this step.  
NOTE: You MUST be a registered owner to be a member of a partnership.

**Add partners** Click to expand drop list

**Individual** **Club, company or syndicate**

Title: \*  OR Name: \*

All forenames: \*

Surname: \*

Date of birth:

Country:

Enter post code: \*

Address: \*

- If you are adding an individual, you can select the title by clicking the arrow at the end of the field to display a drop-down box. Click the desired title to complete the field.
- Forenames and surname can be entered by clicking in the text field and typing. These are mandatory fields and must be completed before you can add the person.

## User Guide – Adding and Removing Partners

- The date of birth should be added in a DD/MM/YYYY format and you can also add the person's email address if you know it. Neither of these are mandatory fields and do not have to be completed if you do not have the information to hand.
- Alternatively, if you wish to add a company, syndicate or racing club enter the name in the box on the left-hand side.
- The next section prompts you to enter the address for the person or entity that you wish to add.
- If you are entering a foreign address, you will need to change the country. Expand the drop-down list by clicking on the arrow to the right of the field.

Country :  Click to manually enter address Click to expand drop list

Enter post code: \*

Address: \*

- You will then be able to manually enter the full address.

**Address:**

Address: \*

Country: \*  

## User Guide – Adding and Removing Partners

- If the person or company you are adding resides in Great Britain, you can either use the post code look up or you can click “Enter Address Manually” to type it in.
- To search for an address via a post code, enter the post code in the field and click “Find Address”.
- A drop-list will be displayed underneath allowing you to select from a list of matching addresses for that post code.

Enter postcode: \* NN8 4bx FIND ADDRESS ENTER ADDRESS MANUALLY

Address: \* Please select...  
Weatherbys Thoroughbred Ltd, Sanders Road, Finedon Road Industrial Estate, WELLINGBOROUGH

ADD PARTNER

- Once the mandatory information has been completed, you can click “Add Partner” to add the person or ownership.
- A warning will display if you have missed any of the mandatory information.
- At the bottom of this screen the remaining partners, plus any you have added on this step or the previous step will be displayed.
- If you have selected anyone in Step 2, you will only see their name displayed, whereas manually entered people or ownerships on Step 3 will display all information that has been entered.

### Partners added

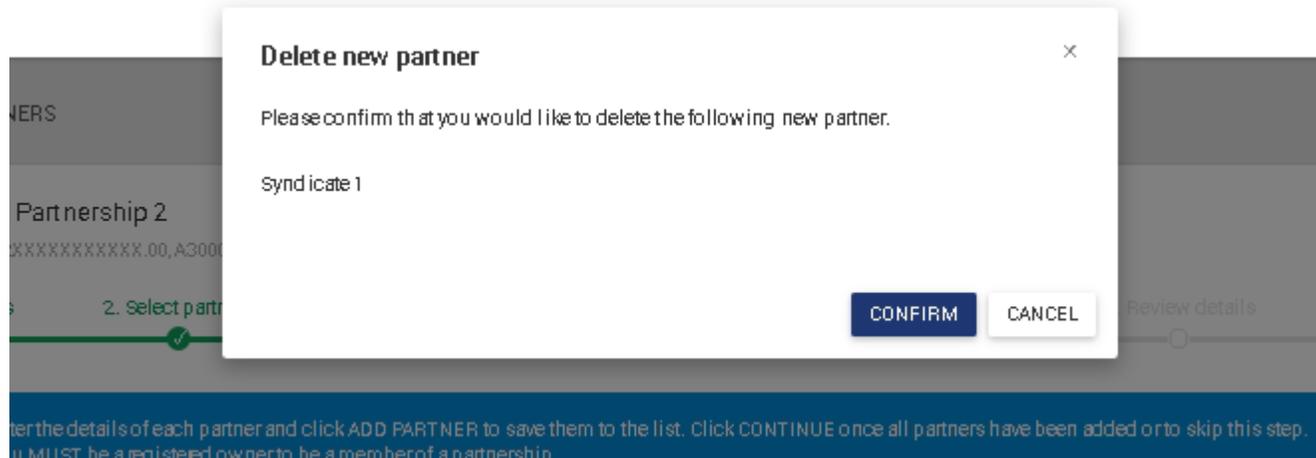
Name	Address	DOB
Syndicate 1	Weatherbys Thoroughbred Ltd, Sanders Road, Finedon Road Industrial Estate, WELLINGBOROUGH, Northamptonshire, NN8 4BX	

Click to delete

- If you have made a mistake whilst adding a person or ownership, you can click the delete icon to remove them.

## User Guide – Adding and Removing Partners

- A pop up window will display and you can either click “Yes” to confirm and remove the details of the person/ownerships or click “No” to continue with those details.



- As with the previous screens you can click “Cancel” if you no longer wish to continue with any changes.
- If you are happy with the changes, please click “Continue”.

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## 5. Update Name

- This is step four in the add and remove partners flow.
- If your partnership name contains the names of the partners you will need to ensure that if you have removed a partner, that they no longer appear in the Partnership name.
- Your current partnership name will appear in the Racing Name field

Partnership 1  
A1X XX X. XXXXXXXX. A2XXXXXXXXXXXXX.00. A300000 XXXXXXXXXX

1. Remove partners 2. Add linked partners 3. Add partners 4. Update name 5. Update percentages 6. Review details 7. Receipt

**!** If you have removed someone from the partnership who appears in the racing name you must change the partnership name.

Racing name : \*

**Remaining partners**

Name
Mr B. Owner

**Added partners**

Name	Address
Mrs A. Owner	

**Partners added**

Name	Address	DOB
Syndicate 1	Weatherbys Thoroughbred Ltd, Sanders Road, Finedon Road Industrial Estate, WELLINGBOROUGH, Northamptonshire, NN8 4BX	

**CONTINUE** **CANCEL**

Click and type to amend

## User Guide – Adding and Removing Partners

- To amend the name, click in the racing name field, you can either remove the name completely by deleting it and typing a new name, or make additions to the current name.
- Please note, your partnership name cannot be longer than 40 characters and must be unique. A warning message will display if the name has already been taken.
- As with previous screens you can use the progress bar to return to previous steps and “Cancel” if you no longer wish to make changes.
- To proceed, click “Continue”.

# User Guide – Adding and Removing Partners

## 6. Update Percentages

- This is step five in the add and remove partners flow.
- If the partnership has horses in its ownership you will be able to update the percentages for any new and remaining partners.

ADD/REMOVE PARTNERS

Partnership 1  
A1X XX X. XXXXXXXX. A2XXXXXXXXXXXXX.00. A300000 XXXXXXXXXX

1. Remove partners 2. Add linked partners 3. Add partners 4. Update name 5. Update percentages 6. Review details 7. Receipt

**i** Please update the ownership percentages of each horse.  
If you wish to remove a horse from the ownership, you should contact your trainer.  
NOTE: To reclaim VAT, the VAT registered owner or group of owners must own a minimum of 50% of a horse.

Horse(s)	Owner	Percentage ownership
Racehorse (GB)	Mr A. Owner	* <input type="text" value="65.0"/>
	Mr B. Owner	* <input type="text" value="0.0"/>
	Mrs N. Owner	* <input type="text" value="0.0"/>
	<b>Total</b>	<b>65</b>

Click and type to amend

CONTINUE CANCEL

- Each partner must have a percentage to proceed.
- The minimum percentage a partner can have is 0.5%

## User Guide – Adding and Removing Partners

- The percentages must add up to 100%.
- Once you have entered the percentages for each partner, you can then proceed to the next screen.
- As with the previous screen, please use the progress bar at the top of the screen to navigate back to previous steps or click “cancel” if you no longer wish to make the amendment.

### 7. Review

- This is the penultimate step in the add and remove partners process.
- It will display all the information you have entered or selected over the previous steps, this includes:
  - Partners Removed – this will display all the partners you have selected for removal
  - Added Partners – this will show the names of the partners you have selected in step 2, if you have added anyone in step 3 it will also show their address in addition to their name.
  - Remaining Partners – here you can see the current partners that have not been added or removed.
  - Ownership Percentages – this will show each horse (if the partnership has any in ownership) and the updated percentages.
  - Fees – you will see the number of amendments, the subsequent amendment fee, VAT, and the total to pay.
- This is the final screen which allows you to navigate back to previous steps to make further amendments. You can also cancel at this point to not proceed with the changes.
- Click “Submit” to send your changes to Weatherbys for processing.

# User Guide – Adding and Removing Partners

1. Remove partners   2. Select partners   3. Add partners   4. Update name   5. Update percentages   6. Review details   7. Receipt

Please check the information below. If the details are correct, please click "SUBMIT".  
If any of the information is incorrect, please click on the relevant numbered step in the progress bar above to amend.

Partners removed	
Name	
Mr B. Owner	

Added partners	
Name	Address
Mr D. Owner	
Mrs C. Owner	

Remaining partners	
Name	Address
Mr. A. Owner	A1 XXXXX XXXXX XXXXXXXX, A2X XXXXXXXX XXXX, A3 XXXXXXXX, Suffolk, CB8 8DW

Ownership percentages		
Horse(s)	Owner	Percentage ownership
Horse 1 (GB)	Mr. A. Owner	50.0 %
	Mr D. Owner	25 %
	Mrs C. Owner	25 %

Total changes made: 3	
Partners removed: 1	
Partners added: 2	

Partnership Amendment Fee	225.00
VAT	45.00
<b>Total</b>	<b>£270.00</b>

**SUBMIT**   **CANCEL**

Example of review screen

# User Guide – Adding and Removing Partners

## 8. Receipt

- This is last screen, it will display the same information as the review screen however you will no longer be able to navigate make to the other screens to make any amendments.
- You will receive a communication advising that your amendments have been submitted.
- All partners will be notified once the amendments have been processed by Weatherbys.
- You will not see the changes until this has been completed.

The screenshot shows a receipt screen with a progress bar at the top indicating six steps: 1. Remove partners, 2. Add Linked Partners, 3. Update name, 4. Update percentages, 5. Review details, and 6. Receipt. The current step is 6, Receipt, which is highlighted in green. Below the progress bar is a green success message box with a checkmark icon. The message reads: "Thank you. The changes to your partnership have been submitted successfully. Please note the changes will be sent to Weatherbys for processing and will not appear against your partnership until this has been completed. All partners will be advised when the changes have been processed. Please remember you are responsible for informing HMRC if this change affects your VAT registration." Below the message are four summary tables. The first table, "Partners removed", lists Mr Paul Moroney. The second table, "Added partners", lists Al Shaqab Racing and Axom. The third table, "Remaining partners", lists Mr E. F. Vaughan. The fourth table, "Ownership percentages", lists Hang Man (IRE) with 50.0% ownership, and Al Shaqab Racing and Axom with 25% ownership each. To the right of these tables is a summary table with an orange header: "Total changes made: 3", "Partners removed: 1", "Partners added: 2". The summary table lists: Partnership Amendment Fee (225.00), VAT (45.00), and Total (£270.00). At the bottom right of the screen is a blue link: "< RETURN TO OWNERSHIP DETAILS".

1. Remove partners 2. Add Linked Partners 3. Update name 4. Update percentages 5. Review details 6. Receipt

Thank you.  
The changes to your partnership have been submitted successfully.  
Please note the changes will be sent to Weatherbys for processing and will not appear against your partnership until this has been completed.  
All partners will be advised when the changes have been processed.  
Please remember you are responsible for informing HMRC if this change affects your VAT registration.

Partners removed	
Name	
Mr Paul Moroney	

Added partners	
Name	Address
Al Shaqab Racing	
Axom	

Remaining partners	
Name	Address
Mr E. F. Vaughan	A1 XXXXX XXXXX XXXXXXXX, A2X XXXXXXXX XXXX, A3XXXXXXXX, Suffolk, CB8 8DW

Ownership percentages		
Horse(s)	Owner	Percentage ownership
Hang Man (IRE)	Mr E. F. Vaughan	50.0 %
	Al Shaqab Racing	25 %
	Axom	25 %

Total changes made: 3	
• Partners removed: 1	
• Partners added: 2	
Partnership Amendment Fee	225.00
VAT	45.00
<b>Total</b>	<b>£270.00</b>

< RETURN TO OWNERSHIP DETAILS

- Click the link at the bottom right hand side of the screen to return to the Owners Details screen.