IR1104 | May 2025

Manage agency

A guide to managing staff access, client list access security and staff mail subscriptions.

As an intermediary you'll have different access and security requirements to another intermediary. The **Manage agency** functions in the **Intermediary centre** menu lets you tailor your staff and client access controls.

Owners, administrators and restricted administrators can only manage access role and account permissions for their agency's business accounts from the **Manage my profile** menu.

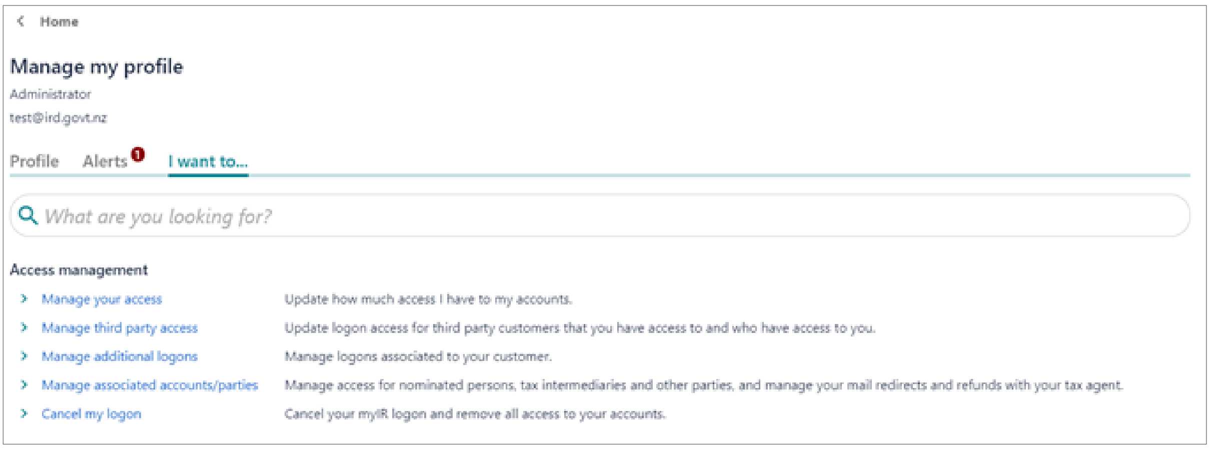
Note: Administrators and restricted administrators can only manage list permissions if they've been given access to the list themselves.

Access roles

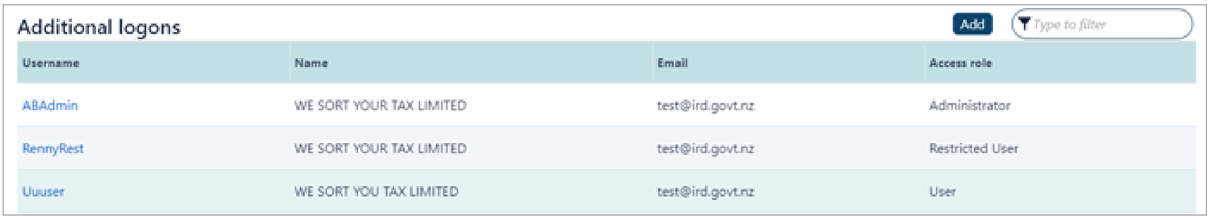
What you can see in myIR differs depending on your access role.

Owner	You'll have full access to all accounts for the intermediary and can set up access for other parties. For Non-individuals, to be an owner you'll be a director of a company, trustee of a trust, administrator or executor of an estate, or partner in a partnership. **Intermediary centre:** You'll have access to all intermediary functions.
Administrator	You'll only have access to the intermediary's own accounts (that the owner gives you access to) and can access the intermediary's customer-level mail. You can also create new restricted users, users and administrator logons. **Intermediary centre:** You'll have the same access as an owner, but not to the web logon activity report. You can only manage client list security for lists you've been given access to.
Restricted administrator	You'll have the same access as administrators, but not access to the intermediary’s customer-level mail. **Intermediary centre**: You'll have the same access as an administrator.
User	You can only access the intermediary's own account that an owner or administrator gives you access to. You cannot access the intermediary's customer-level mail. **Intermediary centre**: You can use all functions that help to manage clients, but you can only see transactional and return summary agency reports.
Restricted user	You'll have the level of access as users. **Intermediary centre**: You can use most functions that help with clients, but you can only see transactional and return summary agency reports. You cannot link or delink clients, and for tax agents, you cannot make financial transfers or deferred status requests.

To review the access role each staff member has, select **Manage my profile link** at the top right-hand of the screen, and under the **I want to...** menu, select **Manage additional logons**.



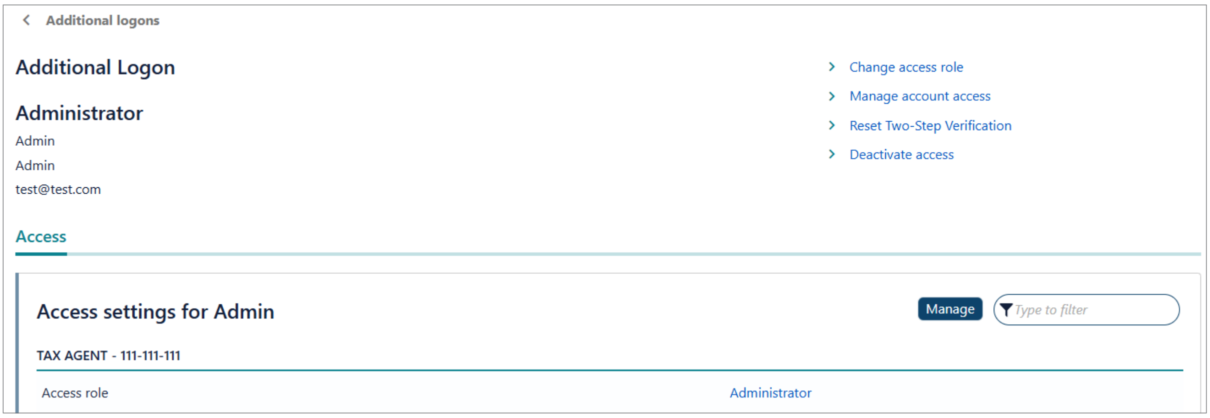
This is where you can review your additional logons and what each person's role is. You can also see their access to your agency's own business accounts.



Changing access roles

To change a staff member's access role:

1. Select the Username logon you want to change
2. Select **Change access role**
3. Select from the drop down box the access role you want to give to the staff member and then save.



An owner, administrator and restricted administrator can reset Two-Step Verification for someone within your agency. When you do this, the logon will receive an email advising that their two-step verification has been reset.

Client list account permissions

You can control who in your agency can access accounts linked to each client list. This lets you to stop staff from accessing client's accounts from the search tab or running reports on them.

Note: PAYE intermediaries only have one client list.

Example

We Sort Your Tax Limited has 2 client lists. List 1 is the general clients list, all staff have access to this. List 2 is a **private list**, it contains links to the director, their husband and family trust. The owner has set all their employees access to **None** for the private list to stop them from accessing and viewing the accounts.

Note: In order to create additional client lists you need to contact IR. Once a new client list is created, you will need to set the staff access permissions.

Staff access permissions

You can also set the level of access someone has to each client list. When they access clients' accounts from the search tab, the access you set will be applied.

Full account access	You can do everything within an account, including updating a refund bank account and credit transfers within returns.
File	You can view everything, send mail, file returns and disclosures. If filing returns is not available for an account (for example, WFFTC), you'll only be able to view the account. You cannot request a credit transfer within a return or make any payments or refund bank account changes.
Read only	You can send secure mail and view account balances, transactions, filed returns, account-specific notices and letters.
None	You cannot do anything or access any clients, if your account permission is set to **None** for a list of clients.

Example

We Sort Your Tax Limited sets their new employees' access level to **Read only** for accounts linked to the main client list. Those employees can access any client from the **Search** tab, and bring any client linked to the main client list in and out of their **Favourites**, but can only view those accounts.

Intermediaries who registered recently.

All new registered intermediaries and their new client lists have their access level set to **None** at registration. The owner (or administrator) will need to review each list and logon, then update the access level for each staff member.

Setting up access

You can set your staff access:

- **By list,** which displays all your client lists, and when you go into each one you'll see the full list of your web logons**.**
- **By logon,** which lets you see all your web logons, and when you go into each one you'll see the full list of client lists.

Setting staff access using By list

To manage the client list permissions you'll need to access each list separately through **List access** and edit the active logons.

You can select a logon to be the key message contact for a client list they have access to. When it has been added, the logon will display in the **Key message contact** column for that list.

IR staff can see this and know who to send an initial message to.

Agency EOT | By list | By logons | Alerts 2

Client lists

Client list ID	Name	Address	Default security	Number of clients	Key message contact	
111-2222	PRIVATE LIST	55 FEATHERSTON STREET PIPITE...	None	8		List access
111-111-111	WE SORT YOUR TAX LIMITED	55 FEATHERSTON STREET PIPITE...	File	997	ABAdmin	List access

The **Active logons** sections will display all your agency logons, their **Access role** and the current **Access permission** they have to clients linked to this list. If you have already added a **key message contact**, the logon will be ticked. To make changes select the **Edit** button.

List EOT | Logons | List details

Active logons — Edit — Type to filter

Logon	Name	Access role	Key message contact	Account permission
OMOwner	Simon Books	Owner	☐	Full account access
ABAdmin	Ally Admin	Administrator	☑	Full account access
RennyRest	Ren Restricted	Restricted User	☐	Full account access
Uuuser	Amy	User	☐	Full account access

To edit each logon's client list permission, you can either:

- select the access you would like to delegate
- use the **Reset to default access** button.

To select a key message contact the logon needs to have at least **Read only** access to the client list. Use the **key message contact** tick box to add or remove or change to another logon.

Note: If more than one of you is editing permissions on a list at any time, only the first saved changes will be applied. When the second person tries to save their changes, their data will be out of date.

List EOT | Logons | List details

Active logons — Reset to default access — Type to filter

Logon	Name	Key message contact	Full account access	File	Read only	None
OMOwner	Simon Books	☐	◉	○	○	○
ABAdmin	Ally Admin	☑	◉	○	○	○
RennyRest	Ren Restricted	☐	◉	○	○	○
Uuuser	Amy	☐	◉	○	○	○

Reset to default access

To change all logons access within a particular list, you can use the **Reset to default access** button. This changes all access to whatever the list default is. To change your list default access to something else, cancel out of this screen to go back to the **Client list detail** and use the **Default access for new logons** function.

Once all logons have been updated, you'll need to confirm the changes you've selected. Saved changes are applied immediately.

By list other features

When you're in each list the header information shows:

- the client list ID and name
- how many clients are linked to that list and how many account links you have for those clients.

Here you can change the list name, address and set up a new **Default access** for any new logons you might create.

Default access for new logons

You can pick the default access for all new logons you create in the future. Setting a default access is optional, you can leave this as **None** and manually set access as new staff come in to your agency.

To change the default access, select the hyperlink and choose a new access level in the drop down. The change only applies to any new logons, existing ones stay the same.

List details tab

You can update your client list name and address here by selecting each link.

Note: Tax agents can also update their bulk mailing address and see the bank account associated to their redirected refunds if one exists.

By logon

To manage the client list permissions you'll need to access each logon separately through **Staff access** and edit the active client lists.

By logon other features

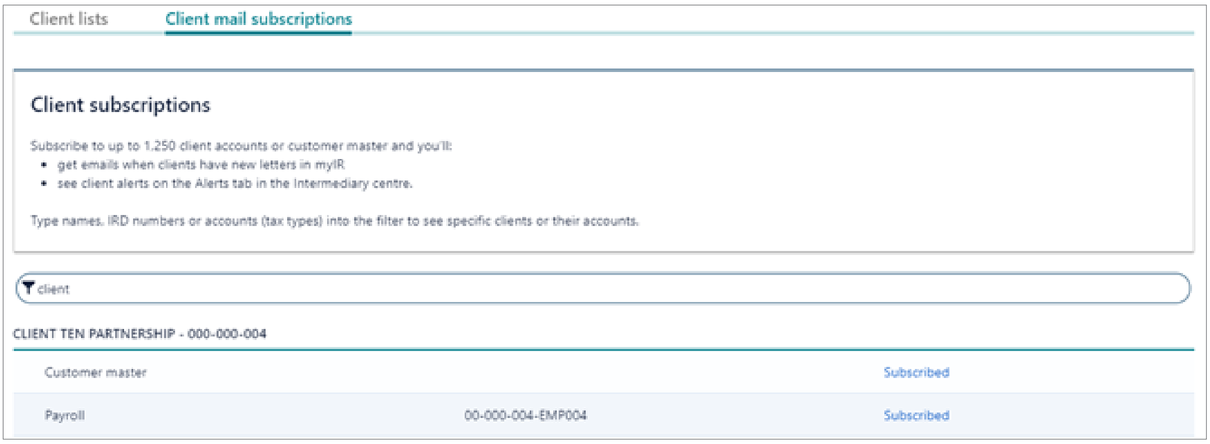
Select the **Staff access** link from the **By logon** tab to look at a particular staff member. From here you can view and edit **Client mail subscriptions** as well as updating their client list permissions.

Client mail subscriptions

Intermediaries can choose what linked client accounts they want to get:

- an alert for
- a notification email for when new letters are available in myIR.

Each staff member can control their own subscriptions from the **Intermediary Centre**. Owners and administrators can view and change everyone's preferences from here too.



This works the same as **Intermediary Centre** for each staff member. All available clients and accounts will display. Owners will see all clients and administrators will see clients linked to lists they have access to. Select the **Subscribed** link to change it to **Unsubscribed**.

You can filter the results by names, IRD numbers or tax types.

Note: Subscribing to mail for an account will send you a notification even if the letter was addressed to someone else. For example, a bookkeeper might subscribe to receive notifications for income tax but a tax agent is linked and has the mail redirected to them. The letter address on the PDF will show who the mail was intended for.