

Linking clients - payroll bureaus and other intermediaries

This factsheet explains how to link clients and transfer them between your client lists.

When you have authority to act on a client's behalf, you'll need to link to them to access their account information. This will also let you access their information in myIR.

To get to the **Link a new client** service:

1. Log in to myIR.
2. Go to the **Tax preparer** tab.
3. Select **Client maintenance**.
4. Select **Link a new client**.

Only one of each intermediary type (ie tax agent, payroll bureau) can be linked to an account type at a time. Using this service to link to a client's account will override any current link another intermediary may have. Different types of intermediaries can be linked to the same account type, or a client could have different tax agents for different accounts.

If you enter an IRD number for a client that is already linked to that client list, the accounts that are already linked will not appear.

If your client wants more than one intermediary of the same type linked to the same account, the intermediary who is not filing the returns will need to be set up as a nominated person.

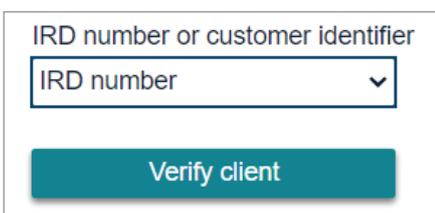
Client lists

If you have multiple client lists, you need to choose which list you're adding your client to

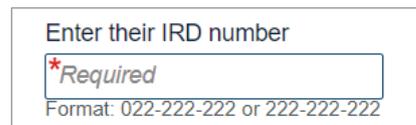
New client information

You need to verify your client and declare you have authority to act on their behalf before you link to their accounts.

1. Choose if you're linking a client with an IRD number or customer identifier.



2. Enter your client's number.



3. Select **Verify client** to confirm it's the correct client.
4. Declare if you have authority to act on this client's behalf.

Note: Some overseas-based clients will be issued a customer identifier instead of an IRD number.

Creating client links

All social policy and tax accounts your client is registered for that you can link to are listed under **Account level** links. This includes any other branches or locations your client may have. It will also show if they are already linked to another intermediary.

Depending on your intermediary type, you may only be able to access certain accounts.

Select the accounts you want to link to.

Select	Account ID	Account type
<input type="checkbox"/>	111-111-111-EMP003	Payroll
<input type="checkbox"/>	111-111-111-INC002	Income tax

If the client is already linked to an intermediary of the same type, using this service will delink and replace them.

Review

Review your changes and submit them when everything is correct. You can view previous pages by using the breadcrumbs at the top of the screen.



Once submitted, you'll get confirmation we've received your request.

After you've linked your client

After you've requested to be linked your client will need to approve your request. If your client has a myIR logon we will email them a link to approve or decline your request. Otherwise they'll get a letter and will need to call us to approve the link. They can call to approve this request before they receive the letter.

The request will expire within 15 days. You will be notified of their response. Once you're linked you'll be able to access your client's account by bringing them into your workspace or using the access client feature in the tax preparer tab.

Transferring clients between client lists

To transfer a client between client lists, follow the same process as if you're linking to a new client.

When you transfer clients between lists, it will appear as a delink on the old list, and a link on the new list on the **Agency activity** reports. Your client will not need to approve this transfer as long as you're not adding any new accounts that you weren't previously linked for.



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- **Log in or register for myIR** - manage your tax and entitlements online.
- **Calculators and tools** - use our calculators, worksheets and tools, for example, to check your tax code, find filing and payment dates, calculate your student loan repayment.
- **Forms and guides** - download our forms and guides.

Forgotten your user ID or password?

Request these online from the myIR login screen and we'll send them to the email address we hold for you.

FREE ADVISORY SERVICE

Our community compliance officers run free tax seminars and workshops for new businesses and organisations. For more information or to register to attend one of these sessions go to ird.govt.nz/seminars or phone 0800 377 774.

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