

Linking clients - tax agents

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, bookkeeper) 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.

IRD number or customer identifier

IRD number

Verify client

2. Enter your client's number.

Enter their IRD number

*Required

Format: 022-222-222 or 222-222-222

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 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.

1. 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

2. Choose to have mail sent to you or the client for each account. Use the hyperlink to change who mail will be sent to.

Send mail to:

Tax agent

3. If you'd like client's refunds deposited into your bank account, you can set up a disbursement account to have client refunds redirected to. You need to talk to your account manager to have a 'disbursements' account set up. This works just like redirecting mail from client to tax agent. You must have your client's written permission to redirect their refunds as part of your authority to act. If you have this set up you will be given the option to 'Send refunds to:' Tax agent or client when you link.

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

Customer master link

This new link type controls whether you are authorised to receive mail that is issued at the 'Customer level' rather than the 'Account (tax type) level'. Customer level mail includes instalment arrangement letters or summary of accounts where multiple accounts are combined.

You may not be linked for all the account types that are covered in a Customer level letter, so make sure you check the wording of your authority to act.

Only one tax agent can hold the 'Customer master' link for a customer. It will display whether an existing tax agent is already linked with the Customer master link. You do not need the Customer master link to set up instalment arrangements.

Example

ABC Accounts Ltd is a large firm who specialise in large income tax accounts. They prepare the annual returns for John Smith.

However, John Smith also uses a smaller firm *XYZ Taxes Ltd* to do his payroll and GST.

ABC Accounts Ltd are linked for income tax and related accounts and have the customer master link. *XYZ Taxes Ltd* are only linked for GST and PAY and related accounts.

Note: Only select this link if your authority to act for this client allows you to act for all tax types.

You can also use the **Access client** feature on the tax preparer tab to view their details without adding them to the workspace.

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. We will not send any notification of this activity to your client unless you add new account links that weren't previously linked.

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.

① Client list ✓ > ② New client information ✓ > ③ Create client links ✓ > ④ Review

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

After you've linked your client

After you've linked your client they'll get a letter or myIR correspondence to confirm you've linked and can now access their information.

Once the client is linked you can add them to the workspace to view their details. To do this, use the **Manage Workspace** link from the confirmation page. The client will then be displayed on your customer & accounts tab for quick access.



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Go to our website for information and to use our services and tools.

- **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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