

# myIR access for tax agents

	Owner	Admin	Restricted admin	User	Restricted user
<b>Home</b>					
Search – Customer identifier/IRD number/name	✓	✓	✓	✓	✓
Favourites	✓	✓	✓	✓	✓
History	✓	✓	✓	✓	✓
<b>My activity</b>					
Search submissions	✓	✓	✓	✓	✓
<b>Communicating with IR</b>					
View messages	✓	✓	✓	✓	✓
View letters	✓	✓	✓	✓	✓
<b>My business</b>					
Agency reports	✓	✓	✓	✓	✓
Client list report	✓	✓	✓	✗	✗
Agency activity report	✓	✓	✓	✗	✗
Web logon activity report	✓	✗	✗	✗	✗
All client transactions	✓	✓	✓	✓	✓
GST return summary report	✓	✓	✓	✓	✓
PAYE return summary report	✓	✓	✓	✓	✓
Unfiled returns report	✓	✓	✓	✗	✗
Manage agency	✓	✓	✓	✗	✗
Update key office holders	✓	✓	✓	✗	✗
L letter request (1 Aug to 15 Feb)	✓	✓	✓	✓	✓
D status request (1 Aug to 20 Mar)	✓	✓	✓	✓	✗
<b>My clients</b>					
Client maintenance	✓	✓	✓	✓	✗
Link a new client to your agency	✓	✓	✓	✓	✗
Delink or manage links	✓	✓	✓	✓	✗
All client mail	✓	✓	✓	✓*	✗
All client messages	✓	✓	✓	✗	✗
Manage payment and returns	✓	✓	✓	✓	✓
Manage client subscriptions	✓	✓	✓	✓	✓
Submit a short-process ruling	✓	✓	✓	✓	✓
Client registration	✓	✓	✓	✓	✗
Register client for a new tax account	✓	✓	✓	✓	✗
Register client for Working for Families	✓	✓	✓	✓	✗
Register client for donation tax credits	✓	✓	✓	✓	✗
Register client for resident withholding tax on interest (IPS)	✓	✓	✓	✓	✗
Register client for non-resident withholding tax (NRT)	✓	✓	✓	✓	✗
Register client for resident withholding tax (RWT)	✓	✓	✓	✓	✗
Register client for approved issuer levy (AIL)	✓	✓	✓	✓	✗
Register client for an international exchange of information account	✓	✓	✓	✓	✗
Register client for R&D tax incentive	✓	✓	✓	✓	✗
Register client for income equalisation	✓	✓	✓	✓	✗
Register client as a NZ foreign trust	✓	✓	✓	✓	✗
Register client for overseas pension transfers	✓	✓	✓	✓	✗
Register client for unclaimed money	✓	✓	✓	✓	✗
Donation tax credits claim	✓	✓	✓	✓	✓
Upload GST returns	✓	✓	✓	✓	✓
Financial transfers	✓	✓	✓	✓	✗
Transfer date calculator	✓	✓	✓	✓	✗
<b>Payroll</b>					
Client employee details	✓	✓	✓	✓	✓
Employer information schedule	✓	✓	✓	✓	✓
Amend employment information	✓	✓	✓	✓	✓
Employer monthly schedules	✓	✓	✓	✓	✓
Amend employer schedules	✓	✓	✓	✓	✓

\* User access to all client main is limited to viewing the letter list only. Users cannot open letter PDFs or export the letters

### **Restricted administrator access**

If you're a restricted administrator, you have access to all the features and functions of administrators, except for viewing customer level mail issued for the agency's own tax affairs. This does not affect account level mail for accounts you have been given specific access to.

### **myIR access for tax agents includes:**

- EOT stats dashboard
- L letter and D status request
- unfiled returns report
- financial transfers
- customer master link allows you to view clients customer mail and register them for new accounts
- the ability to redirect your clients' mail and refunds.

**Note:** If you register a client for a new account from the intermediary centre, the client will be linked at the same time.

If you use the IRD number registration, the client will be linked automatically to the income tax account and the customer master when the IRD number is issued.

