



# myIR access for Bookkeepers

	Owner	Admin	Restricted admin	User	Restricted user
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<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	✓	✓	✓	✓	✓
Manage agency	✓	✓	✓	✗	✗
Update key office holders	✓	✓	✓	✗	✗
<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 an international exchange of information account	✓	✓	✓	✓	✗
Register client for donation tax credits	✓	✓	✓	✓	✗
Register client for unclaimed monies	✓	✓	✓	✓	✗
Register client for income equalisation	✓	✓	✓	✓	✗
Register client as a NZ foreign trust	✓	✓	✓	✓	✗
Register client for R&D tax incentive	✓	✓	✓	✓	✗
Register client for Working for Families	✓	✓	✓	✓	✗
Donation tax credits claim	✓	✓	✓	✓	✓
<b>Payroll</b>					
Client employee details	✓	✓	✓	✓	✓
Employer information schedule	✓	✓	✓	✓	✓
Amend employment information	✓	✓	✓	✓	✓
Employer monthly schedules	✓	✓	✓	✓	✓
Amend employer schedules	✓	✓	✓	✓	✓

\* User access to all client mail 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 an Administrator, except you cannot view any customer level mail issued for the Bookkeeper's own tax affairs. This does not affect account level mail for accounts you have been given specific access to. For example, a Restricted administrator who has been delegated access to the Bookkeepers GST account.

### **Registering a new account**

If you register a client for a new account from the Intermediary centre, the client will be linked to you at the same time.

### **Bookkeepers vs Tax agents**

Unlike Tax agents, Bookkeepers will not be able to:

- view anything in relation to extension of time for income tax
- add a Customer master link (so no access to customer level mail or information)
- use the Financial transfers facility or access the transfer credit calculator
- redirect client mail or refunds.