Registered tax agent

	Owner	Admin	Restricted Admin	User	Restricted user
Home	Yes	Yes	Yes	Yes	Yes
Favourites	Yes	Yes	Yes	Yes	Yes
Search - IRD number/Customer identifier/Name	Yes	Yes	Yes	Yes	Yes
History	Yes	Yes	Yes	Yes	Yes
My activity					
Search submissions	Yes	Yes	Yes	Yes	Yes
Communicating with IR					
View messages	Yes	Yes	Yes	Yes	Yes
View letters	Yes	Yes	Yes	Yes	Yes
My business					
Agency reports	Yes	Yes	Yes	Yes	Yes
Client list report	Yes	Yes	Yes	No	No
Agency activity report	Yes	Yes	Yes	No	No
Web logon activity report	Yes	No	No	No	No
All client transactions	Yes	Yes	Yes	Yes	Yes
GST return summary report	Yes	Yes	Yes	Yes	Yes
PAYE return summary report	Yes	Yes	Yes	Yes	Yes
Unfiled returns report	Yes	Yes	Yes	No	No
Manage Agency	Yes	Yes	Yes	No	No
Update key office holders	Yes	Yes	Yes	No	No
L Letter request (1 Aug to 15 Feb)	Yes	Yes	Yes	Yes	Yes
D status request (1 Aug to 20 Mar)	Yes	Yes	Yes	Yes	No
My clients					
Client maintenance	Yes	Yes	Yes	Yes	No
Link a new client to your agency	Yes	Yes	Yes	Yes	No
Delink or manage links	Yes	Yes	Yes	Yes	No
All client mail	Yes	Yes	Yes	Yes*	No
Manage Subscriptions	Yes	Yes	Yes	Yes	Yes
Submit a short-process ruling	Yes	Yes	Yes	Yes	No
Client registration	Yes	Yes	Yes	Yes	No
Register a new tax account	Yes	Yes	Yes	Yes	No
Register a new customer	Yes	Yes	Yes	Yes	No
Register a new individual	Yes	Yes	Yes	Yes	No
Register client for unclaimed monies	Yes	Yes	Yes	Yes	No
Register client for donation tax credit	Yes	Yes	Yes	Yes	No
Register for Income Equalisation	Yes	Yes	Yes	Yes	No
Register client for NZ Foreign Trust	Yes	Yes	Yes	Yes	No
Register client for R&D Tax incentive	Yes	Yes	Yes	Yes	No
Register client for Working for Families	Yes	Yes	Yes	Yes	No
Donation tax credits claim	Yes	Yes	Yes	Yes	Yes
Apply for Resurgence Support	Yes	Yes	Yes	Yes	No
Upload GST returns	Yes	Yes	Yes	Yes	Yes
Financial transfers	Yes	Yes	Yes	Yes	No
Transfer date calculator	Yes	Yes	Yes	Yes	No
Payroll					
Client employee details	Yes	Yes	Yes	Yes	Yes
Employer information schedule	Yes	Yes	Yes	Yes	Yes
Amend employment information	Yes	Yes	Yes	Yes	Yes
Employer monthly schedule	Yes	Yes	Yes	Yes	Yes
Amend employer schedules	Yes	Yes	Yes	Yes	Yes
Single employer	Yes	Yes	Yes	Yes	Yes
Multiple employers	Yes	Yes	Yes	Yes	Yes

*User access to All client mail is limited to viewing the letter list only. Users cannot open letter PDF's or export the letters.

Administrators v's Restricted administrators
Restricted administrators are able to access all of the features and functionality available to an Administrator.
But cannot view any customer level mail that has been issued for the agency's own tax affairs.
This will not affect access to account level mail for accounts that they have been given specific access to.
For example, a Restricted administrator who has been delegated access to the agency's GST account.

Tax agents are the only intermediary that has the EOT stats dashboard, L letter request, D status request and financial transfers.

Tax agents are also the only intermediary that can link the 'customer master' which allows them to register clients for new IRD numbers in myIR.

Tax agents get automatic access to clients once they've linked.

If a tax agent registers a client for a new account from the intermediary centre, they will be linked at the time it is created.

If they use the IRD number registrations they will be autolinked to the income tax account and the customer master once the IRD number is created.

Tax agents are the only intermediary that has a bulk mailing address. They may also have a refund redirect bank account visible on their client list details tab under Manage agency.