Help scenarios

Access and permissions:

- Assigning or modifying access and permissions
- Copy permissions
- Manage Access

Restricted Clients

- Add a restricted client
- Manage who can access a restricted client

Business Appointments (Appointing Business)

- Appoint a business and assign permission
- Modify business appointment
- Modify or Remove business appointment

Business Appointments (Appointed Business)

- Assign access to my credential holders for appointing business
- Removing modify the permissions I have assigned to my credential holders for an appointing business

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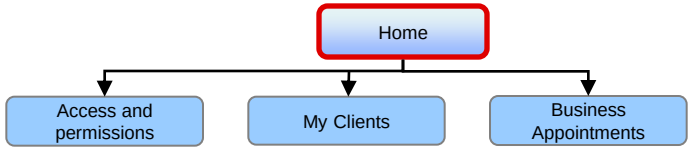
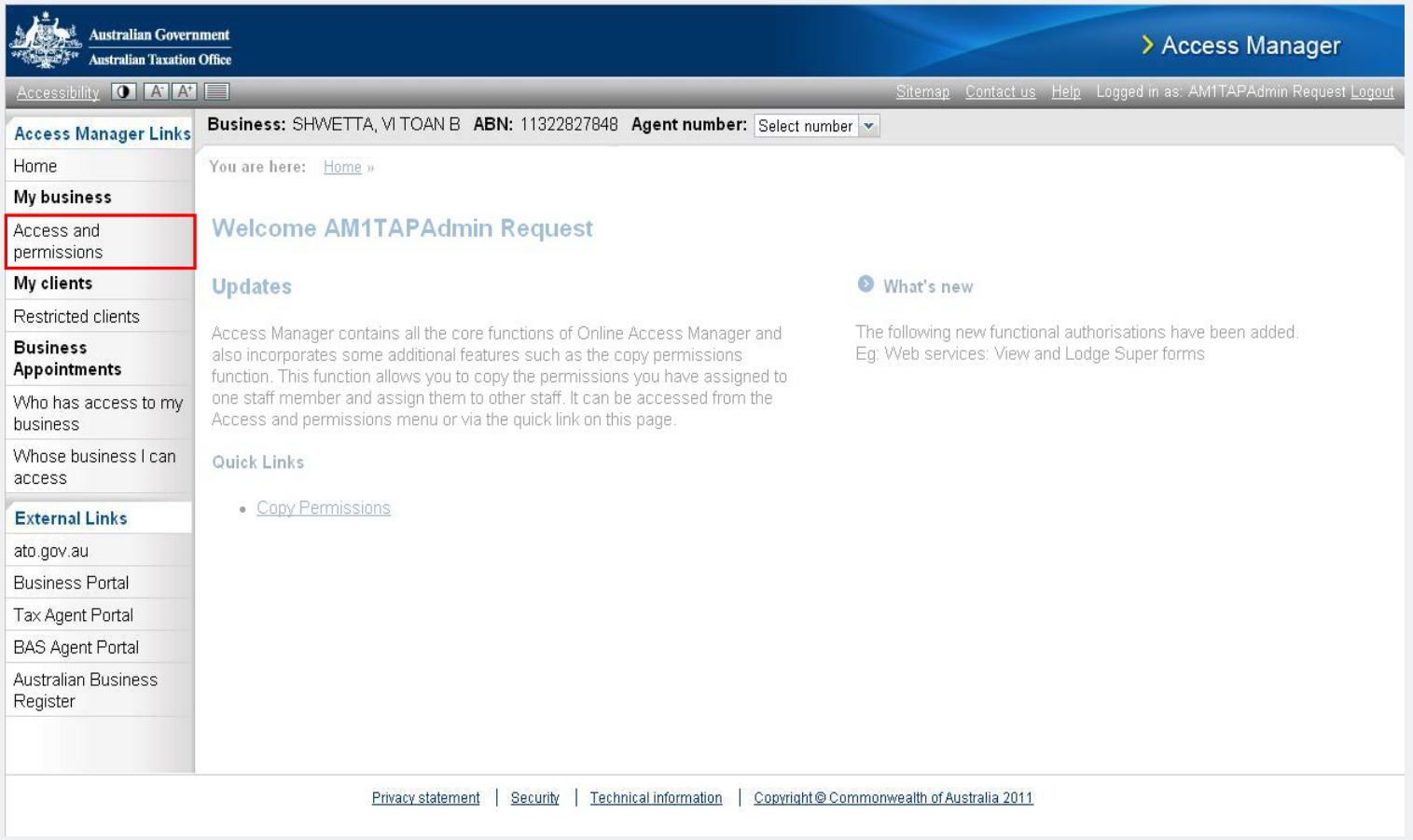
Access Manager

Australian Government
Australian Taxation Office

Scenario – Assigning or modifying access and permissions



Step 1 - Select ‘Access and permissions’ from the left hand menu



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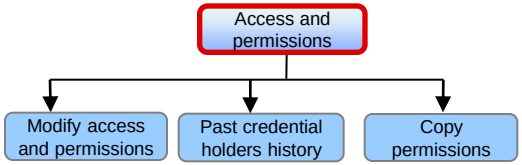
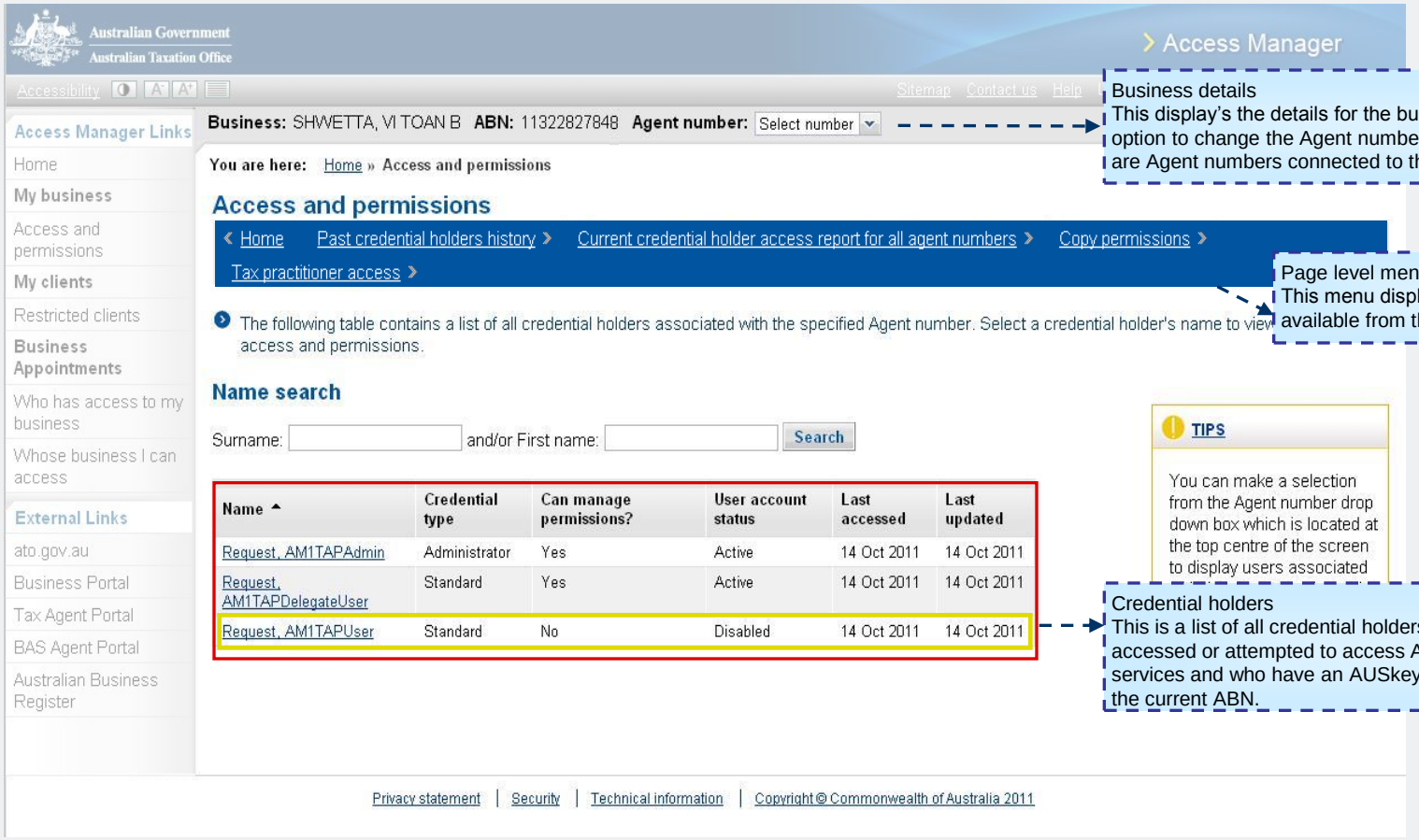
Scenario – Assigning or modifying access and permissions



Step 2 - Select the credential holder



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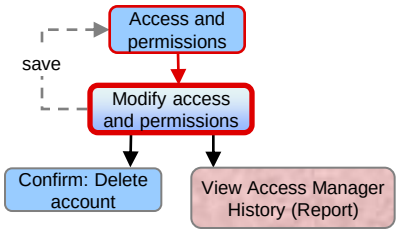
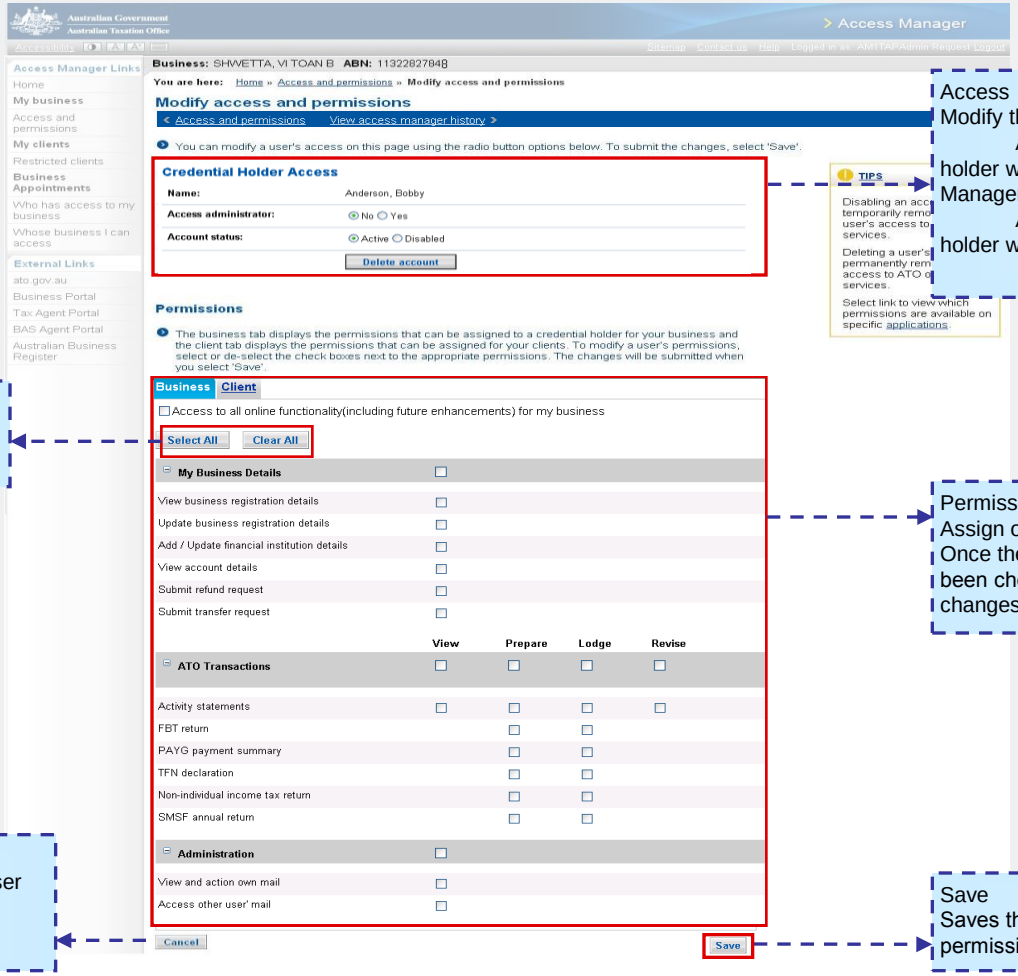
Australian Taxation Office

Scenario – Assigning or modifying access and permissions



Step 3 – Assign or modify access and permissions



Access
Modify the credential holders access.
Access administrator – if 'Yes' the credential holder will have the authority to login to Access Manager
Account status – if 'Disabled' the credential holder will not be authorised to log into the portals

Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Assign or modify the credential holders permissions. Once the checkbox aligned with the permission has been checked you must select 'save' for the changes to take effect

Cancel
Cancels any permissions granted, takes user to 'Access and permissions' page with a process message.

Save
Saves the permissions, takes user to 'Access and permissions' homepage with a process message.

Access Manager

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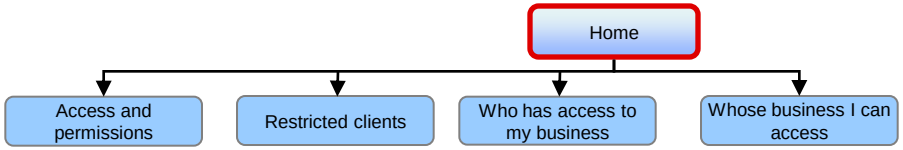
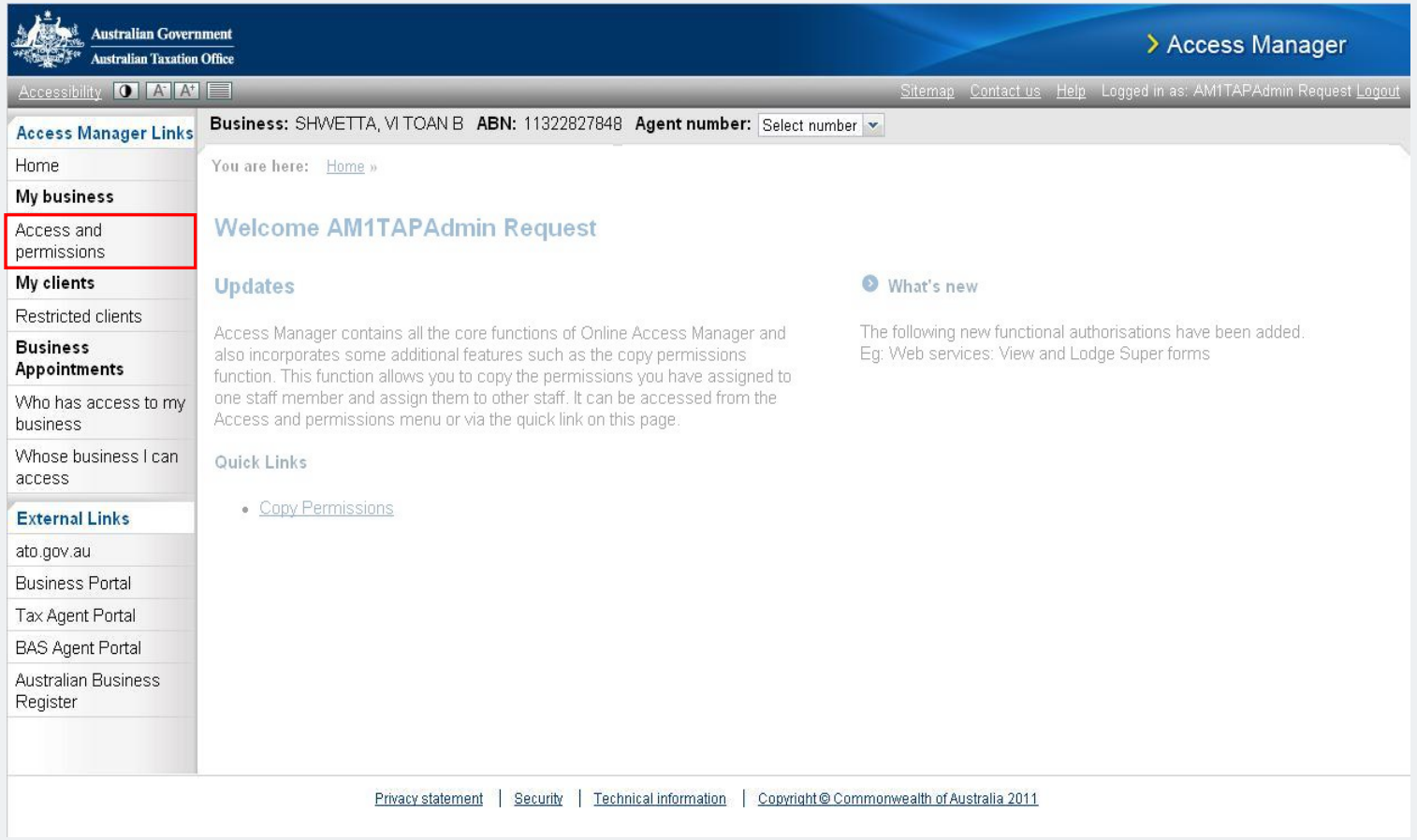
Australian Taxation Office

Scenario – Copy permissions



Step 1 - Select ‘Access and permissions’ from the left hand menu



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Access Manager

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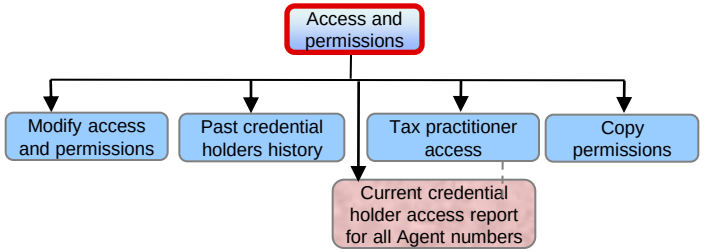
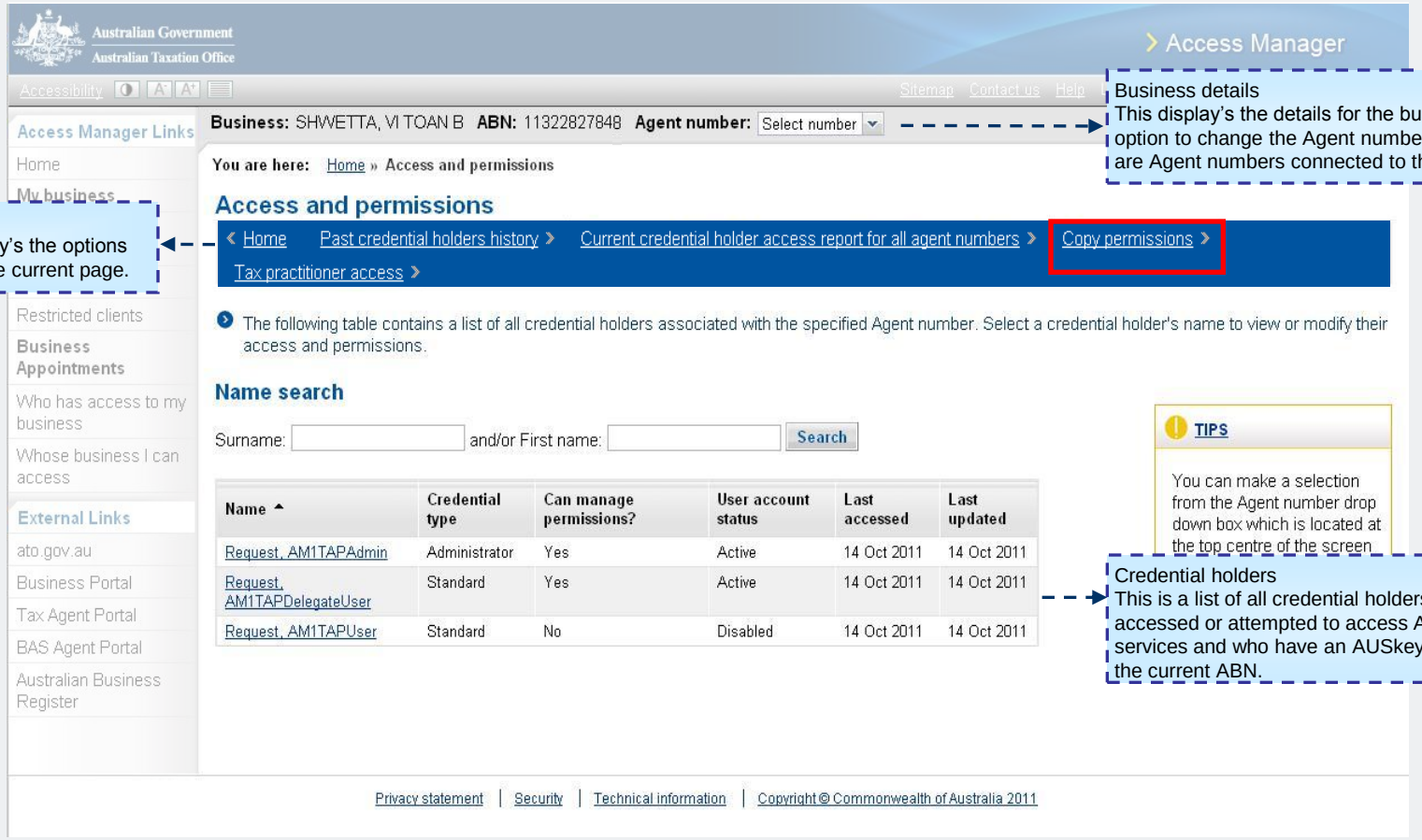
Australian Taxation Office

Scenario – Modifying access and permissions or Delete account



Step 2 - Select 'Copy Permissions' from the page level menu



Business details
This display's the details for the business and the option to change the Agent number in focus if there are Agent numbers connected to the ABN.

Page level menu
This menu display's the options available from the current page.

Credential holders
This is a list of all credential holders who have accessed or attempted to access ATO online services and who have an AUSkey registered under the current ABN.

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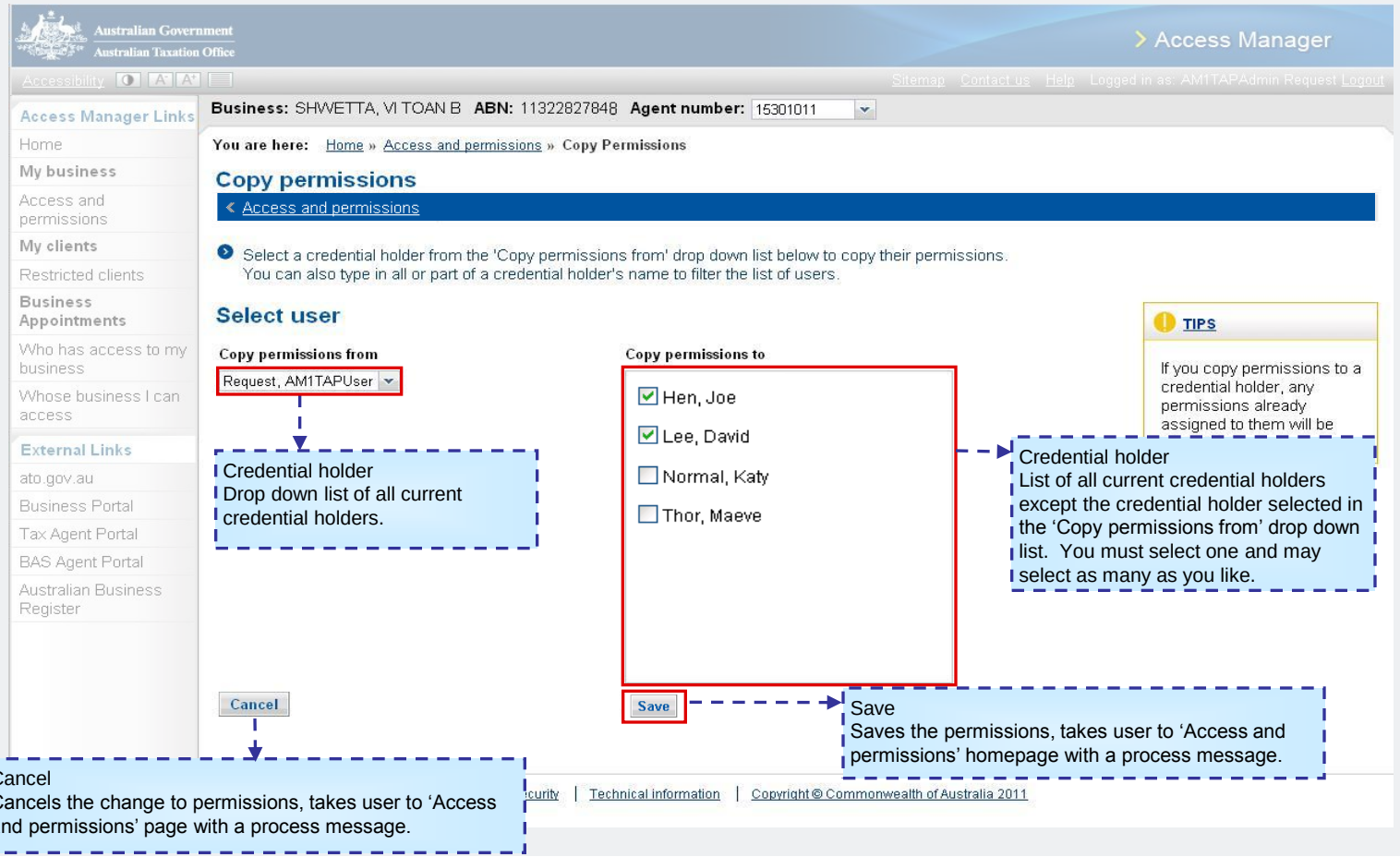
Scenario – Modifying access and permissions or Delete account

Access and permissions
→ Copy permissions

Step 3
- Select the credential holder to copy the permissions from
- Select at least one credential holder to copy the permissions to



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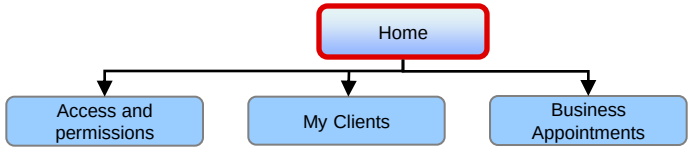
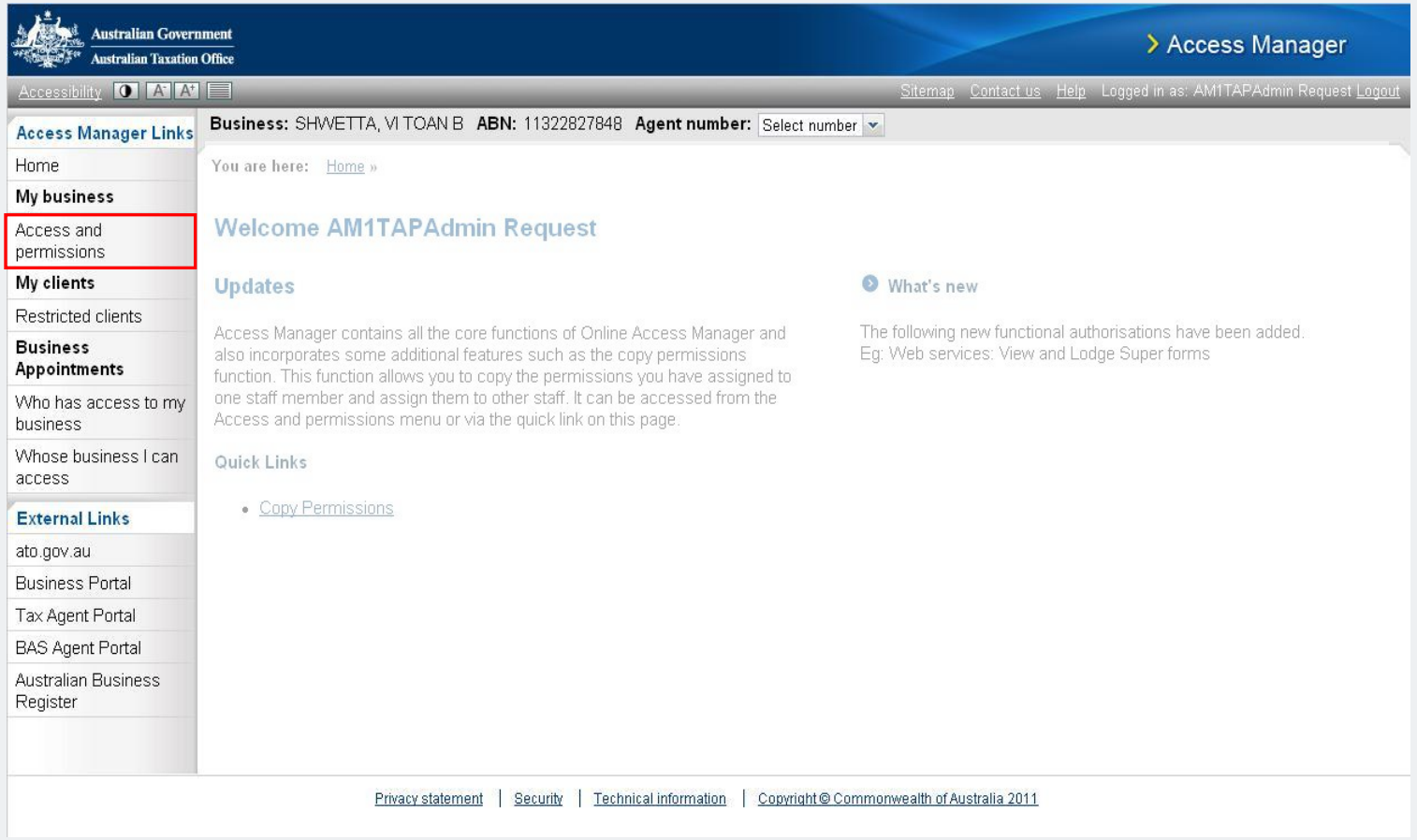
Scenario – Manage Access



Step 1 - Select ‘Access and permissions’ from the left hand menu



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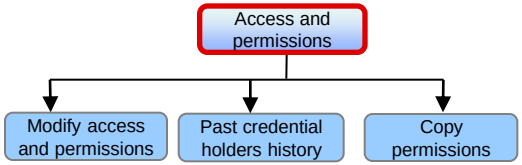
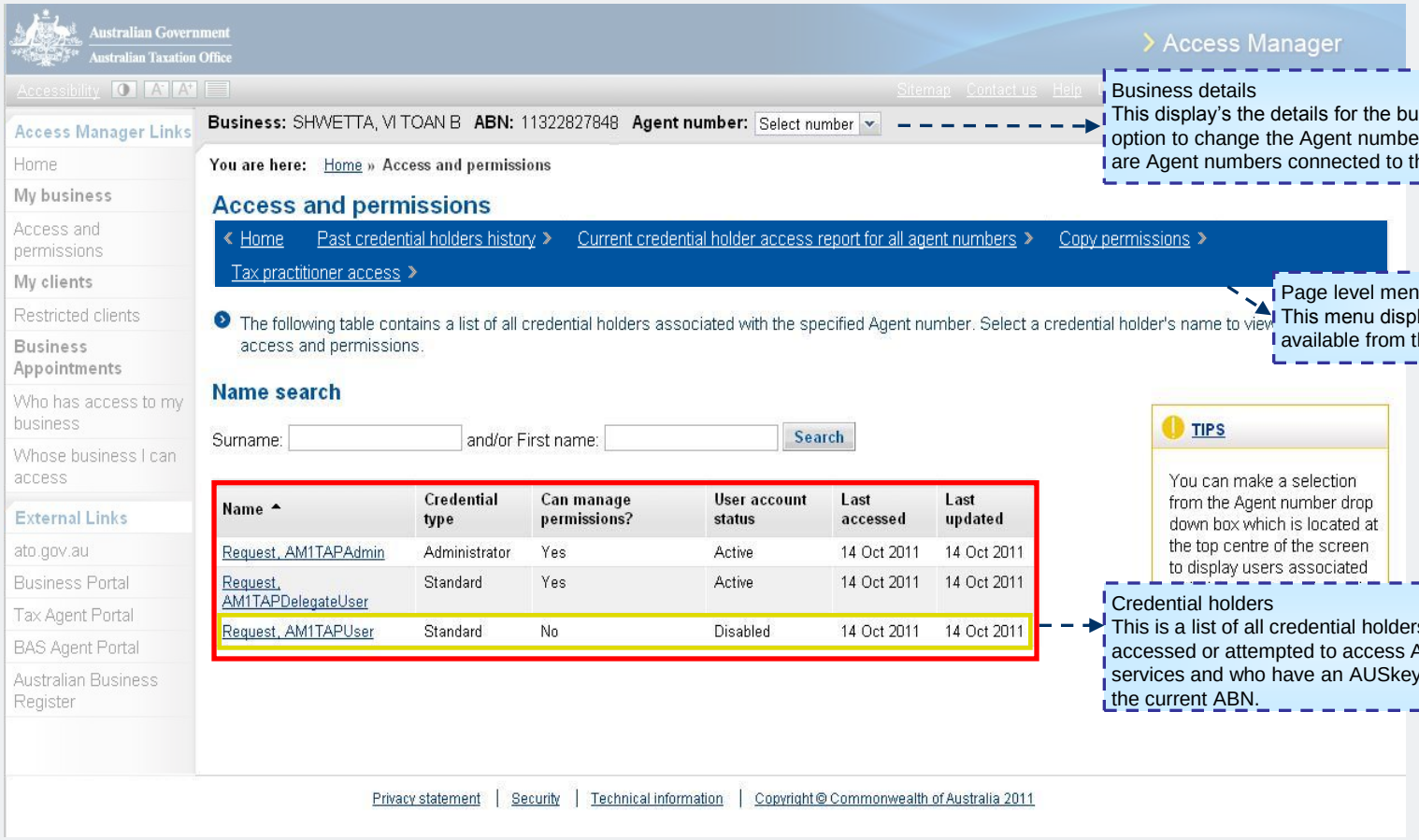
Australian Taxation Office

Scenario – Manage Access



Step 2 - Select the credential holder



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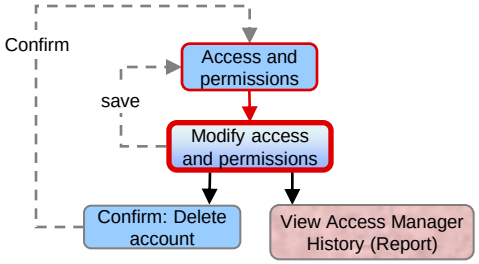
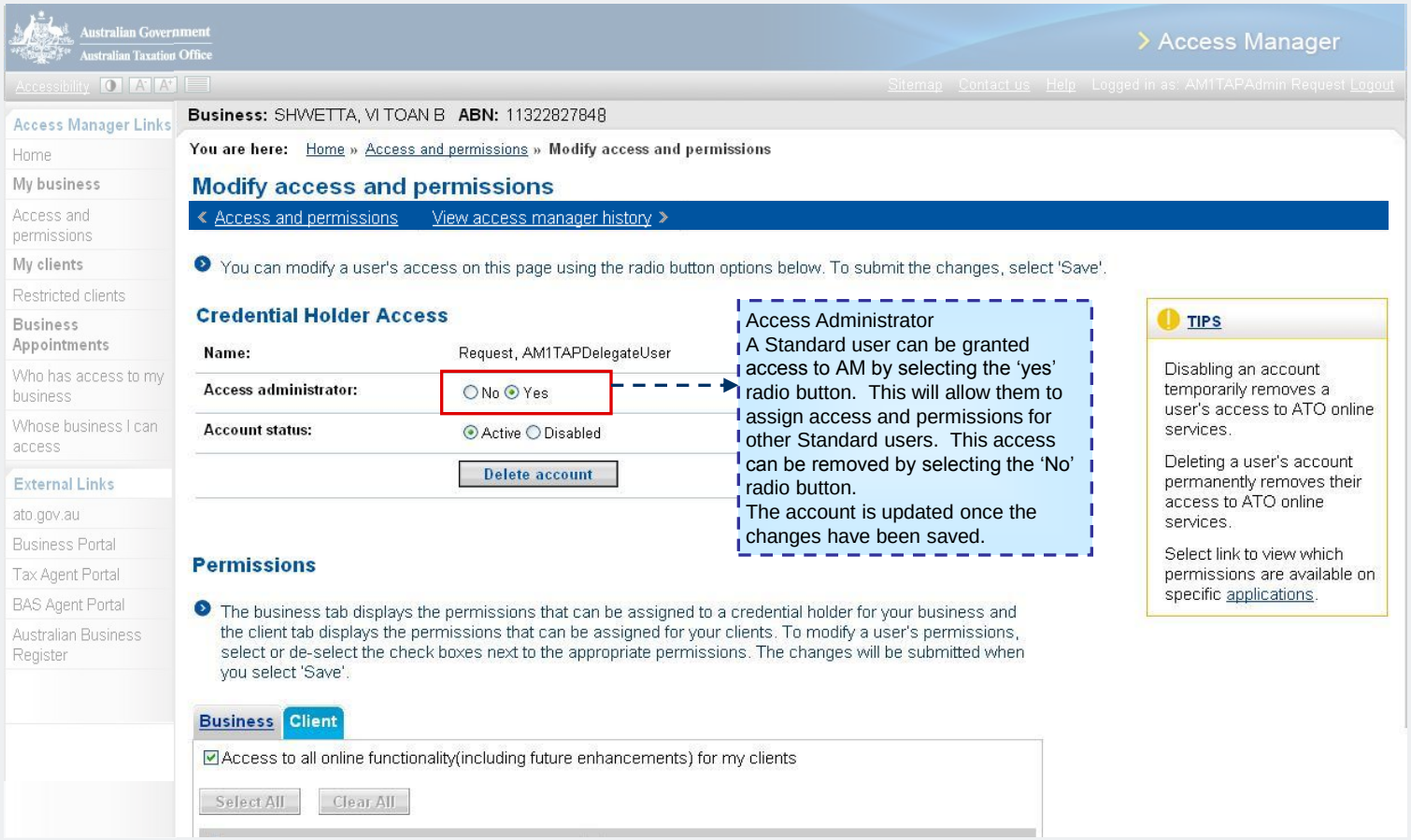
Australian Taxation Office

Scenario – Manage Access – Access administrator



Step 3a – Select the 'No' or 'Yes' radio button next to Access Administrator



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Access Manager

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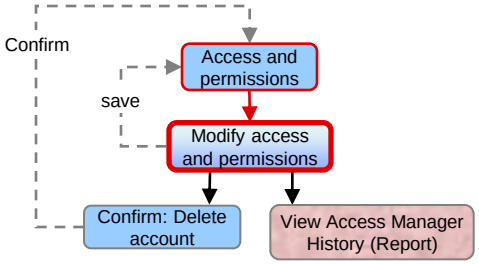
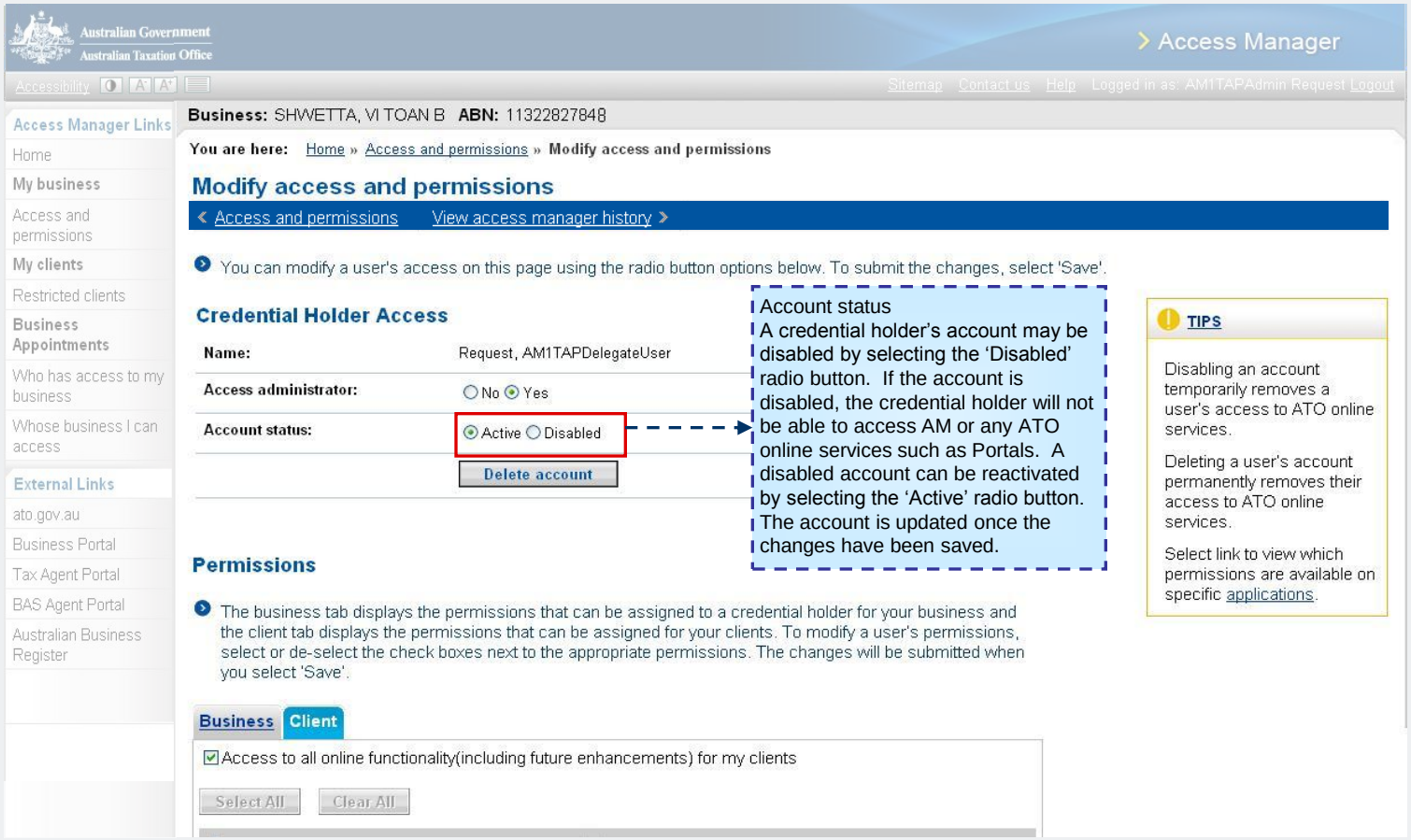
Australian Taxation Office

Scenario – Manage Access – Disable Account



Step 3b – Select the ‘Active’ or ‘Disabled’ radio button next to Account status



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Access Manager

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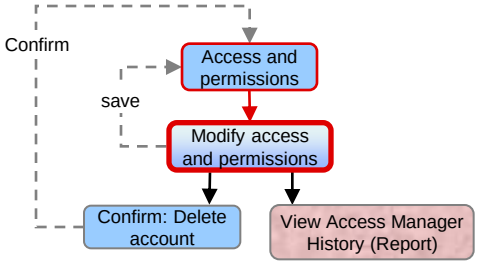
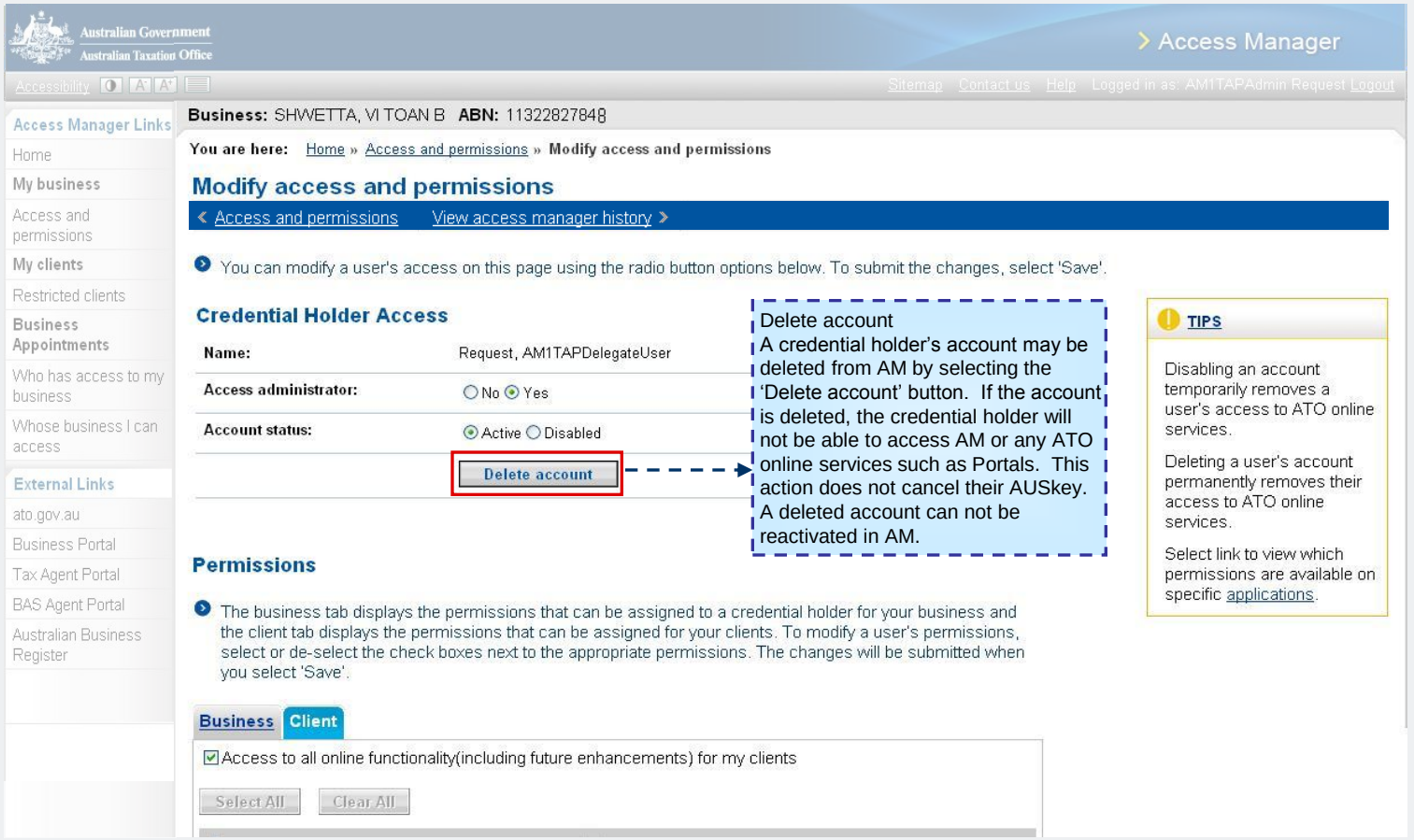
Australian Taxation Office

Scenario – Manage Access - Delete account



Step 3c – Select ‘Delete account’



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Access Manager

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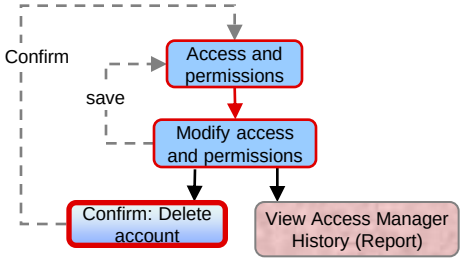
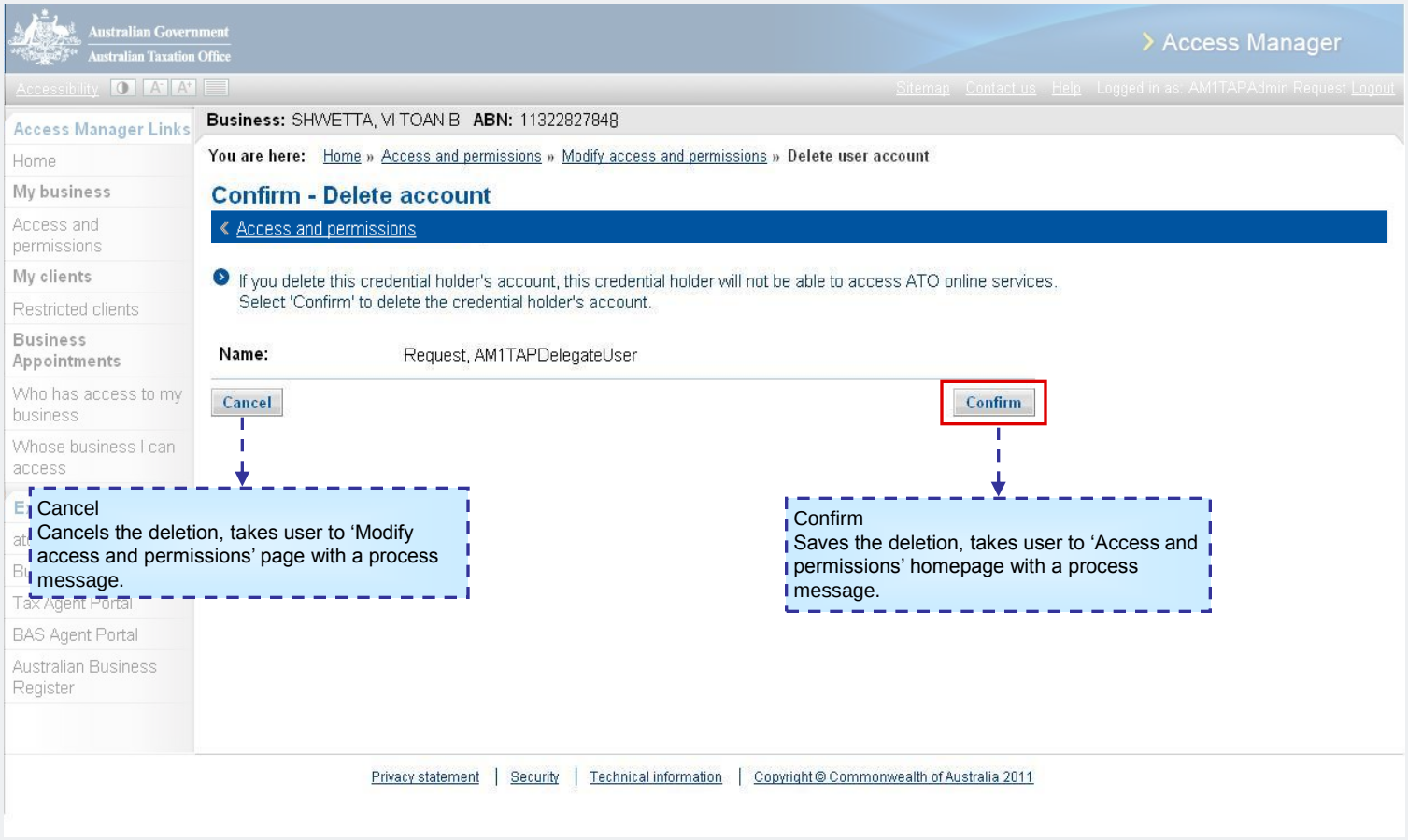
Australian Taxation Office

Scenario – Manage Access - Delete account



Step 4 – Select ‘Confirm’ to delete the account



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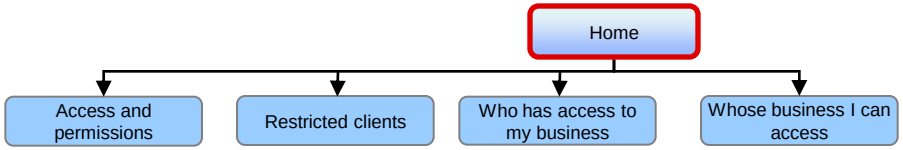
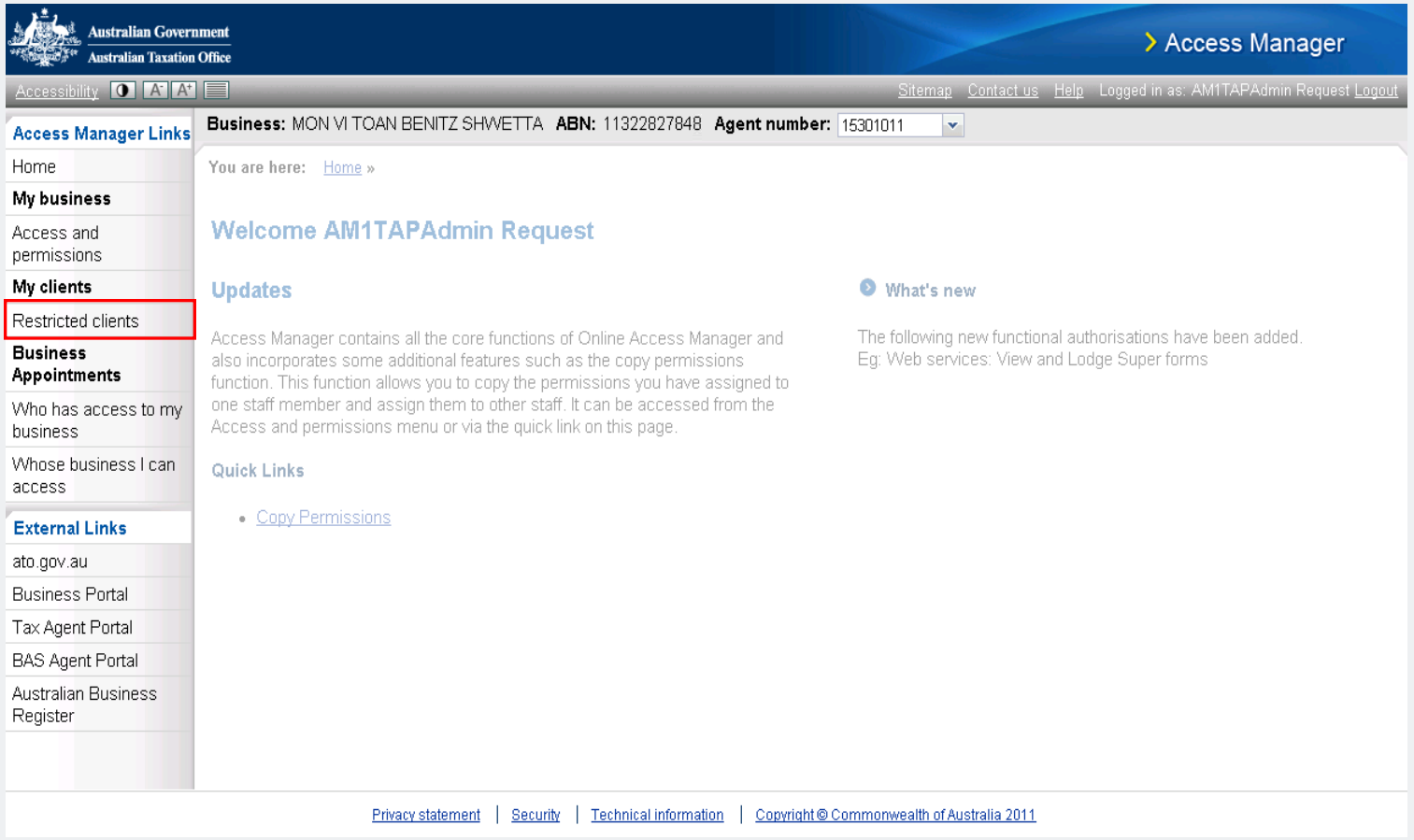
Scenario – Add a restricted client



Step 1 - Select ‘Restricted clients’ from the left hand menu



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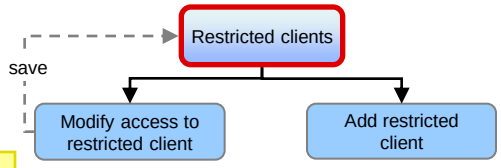
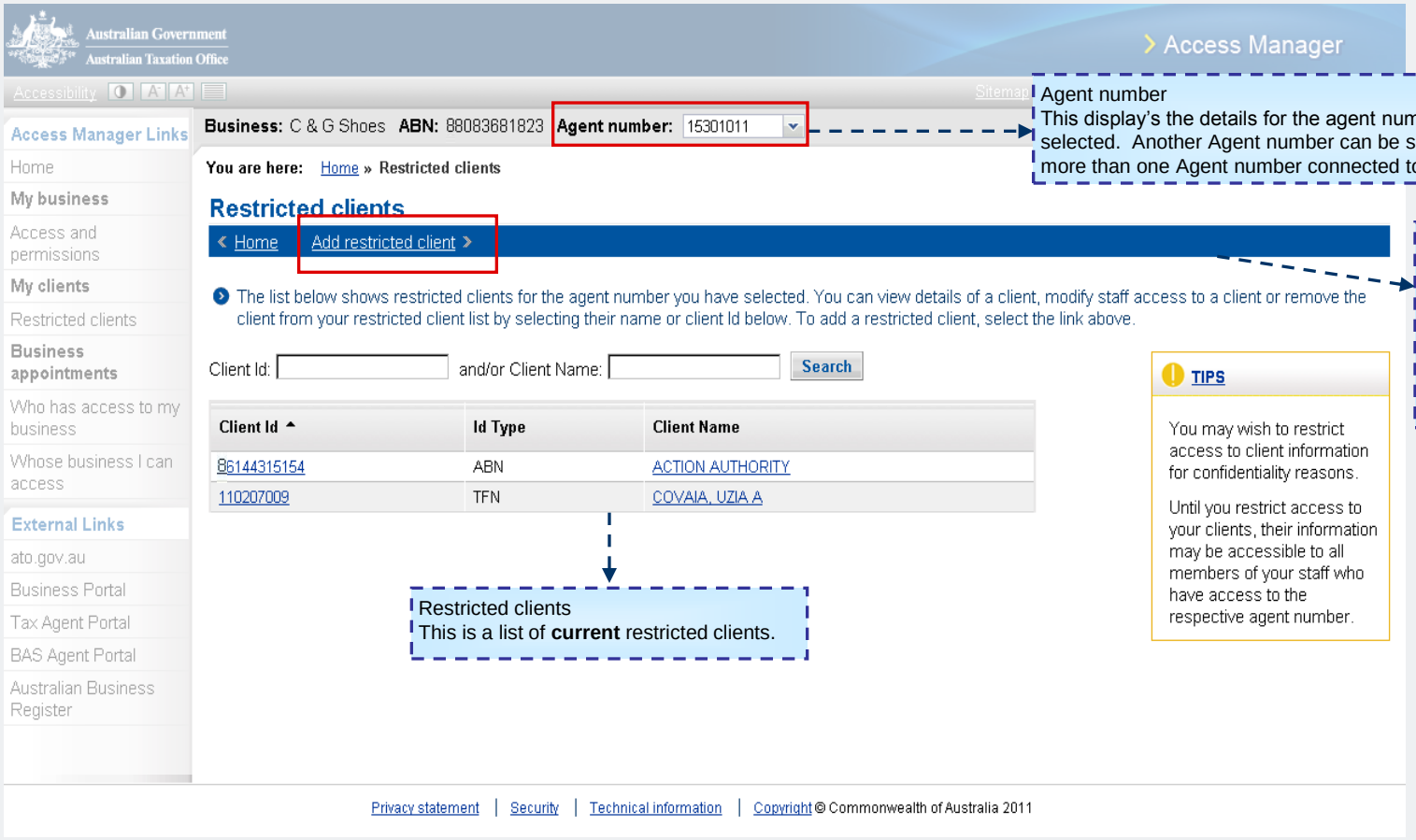
Australian Taxation Office

Scenario – Add restricted client



Step 2
- Select an Agent number from the 'Agent number' drop down box; and
- Select 'Add restricted client'



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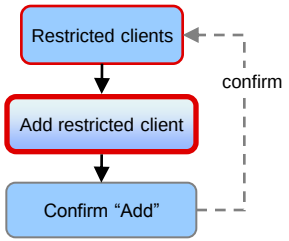
Scenario – Add restricted client



Step 3 - Select ‘Client Id’ or ‘Client Name’ of the client to be restricted

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Access Manager

Accessibility | Sitemap | Contact us | Help | Logged in as: AM1TAPAdmin Request Logout

Business: MON VI TOAN BENITZ SHWETTA **ABN:** 11322827848 **Agent number:** 15301011

You are here: Home » Restricted clients » **Add restricted client**

Access Manager Links
- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business Appointments
- Who has access to my business
- Whose business I can access

External Links
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Add restricted client

< Restricted clients

To add a client to your restricted client list, select their client Id or name from the list below. You can filter the list of clients by entering the client's Id or name into the search fields.

Client Id: and/or Client Name: Search

Client Id	Id Type	Client Name
85075056058	ABN	A & A ASSOCIATES PTY LTD RAED
68083112056	ABN	A & A ASSOCIATES PTY. LIMITED RAED
32000070278	ABN	A & A CONSTRUCTIONS PTY LTD
81080852535	ABN	A & A PTY LTD
42028625	TFN	A & A PTY. LIMITED
78082496697	ABN	A & H AGENCIES PTY LTD
32876841391	ABN	A & H MANAGEMENT SERVS PTY LTD
76089953948	ABN	A & H P SERVICES PTY LIMITED
52857916257	ABN	A & I CONSTRUCTIONS PTY LTD
77000058644	ABN	A & S CONSTRUCTIONS PTY LTD

Displaying 1 to 10 of 103 records found < Previous 1 2 3 4 5 6 7 8 9 10 Next >

Cancel

TIPS

Only unrestricted clients associated with the selected Agent number are displayed on this screen. You can make a different selection from the Agent number drop down box to display clients associated with that Agent number.

Client list
This is a list of all unrestricted clients who are associated with the selected Agent number are displayed.

Cancel
Cancels the addition of a restricted client, takes user to ‘Modify access and permissions’ page with a process message.

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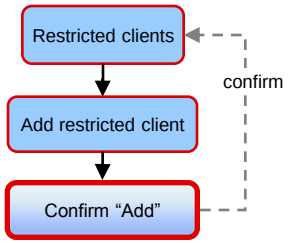
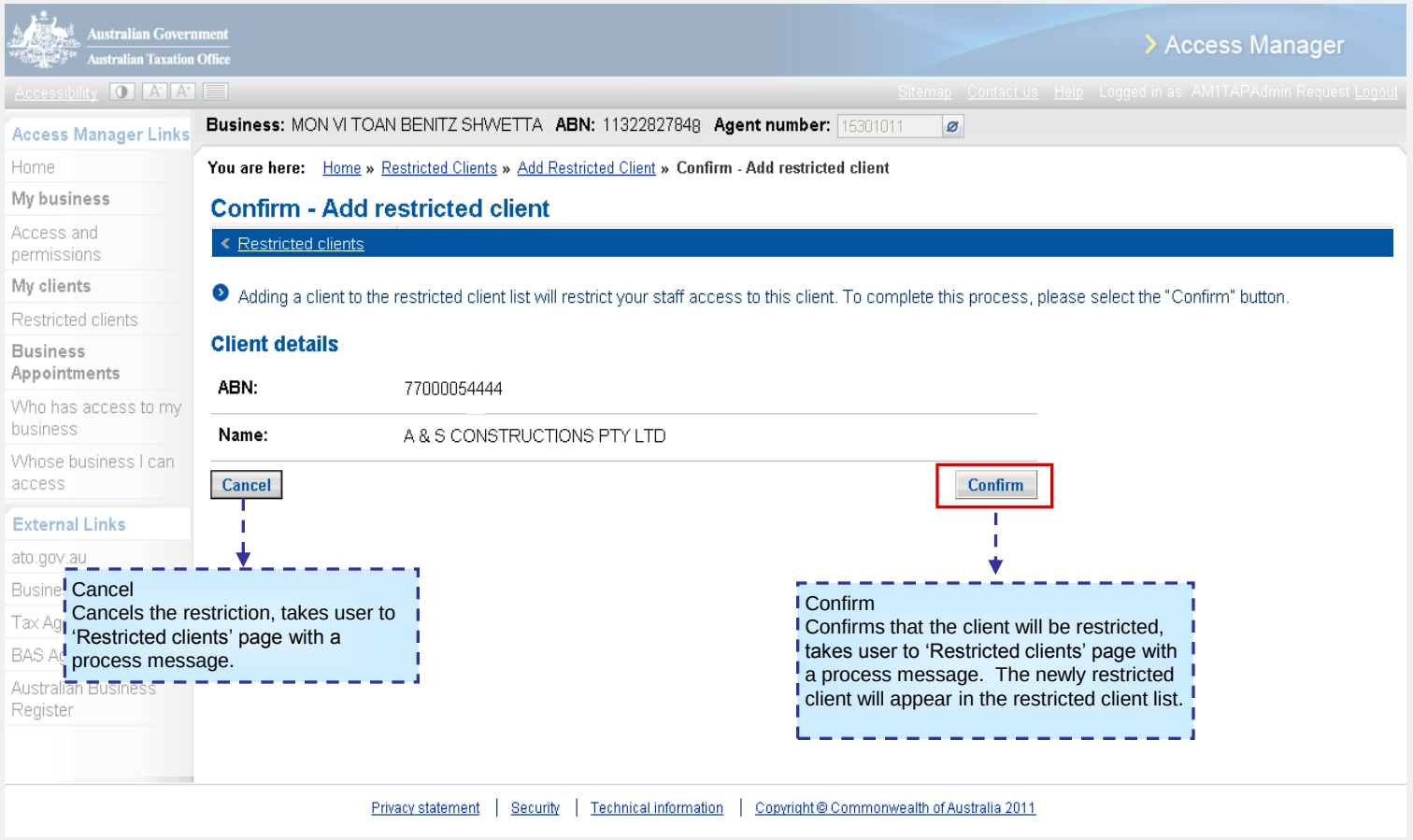
Scenario – Add restricted client



Step 3 - Select ‘Confirm’



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Access Manager

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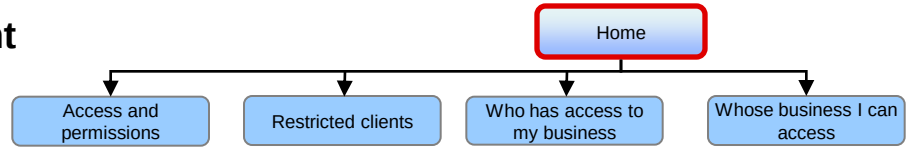
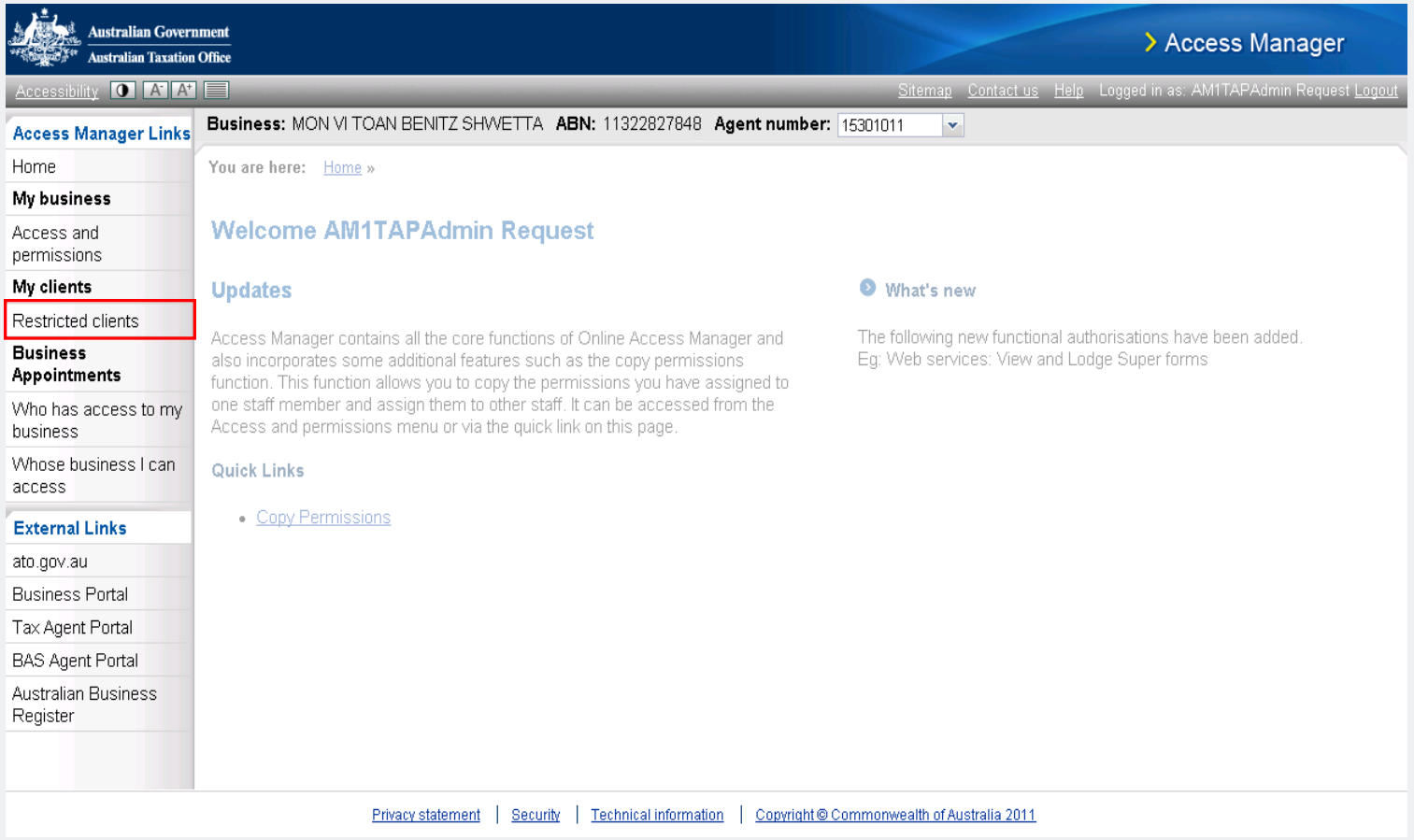
Australian Taxation Office

Scenario – Manage who can access a restricted client



Step 1 - Select ‘Restricted clients’ from the left hand menu



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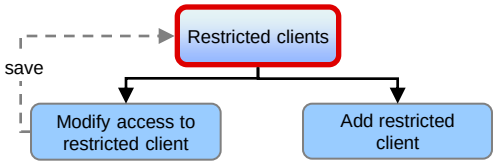
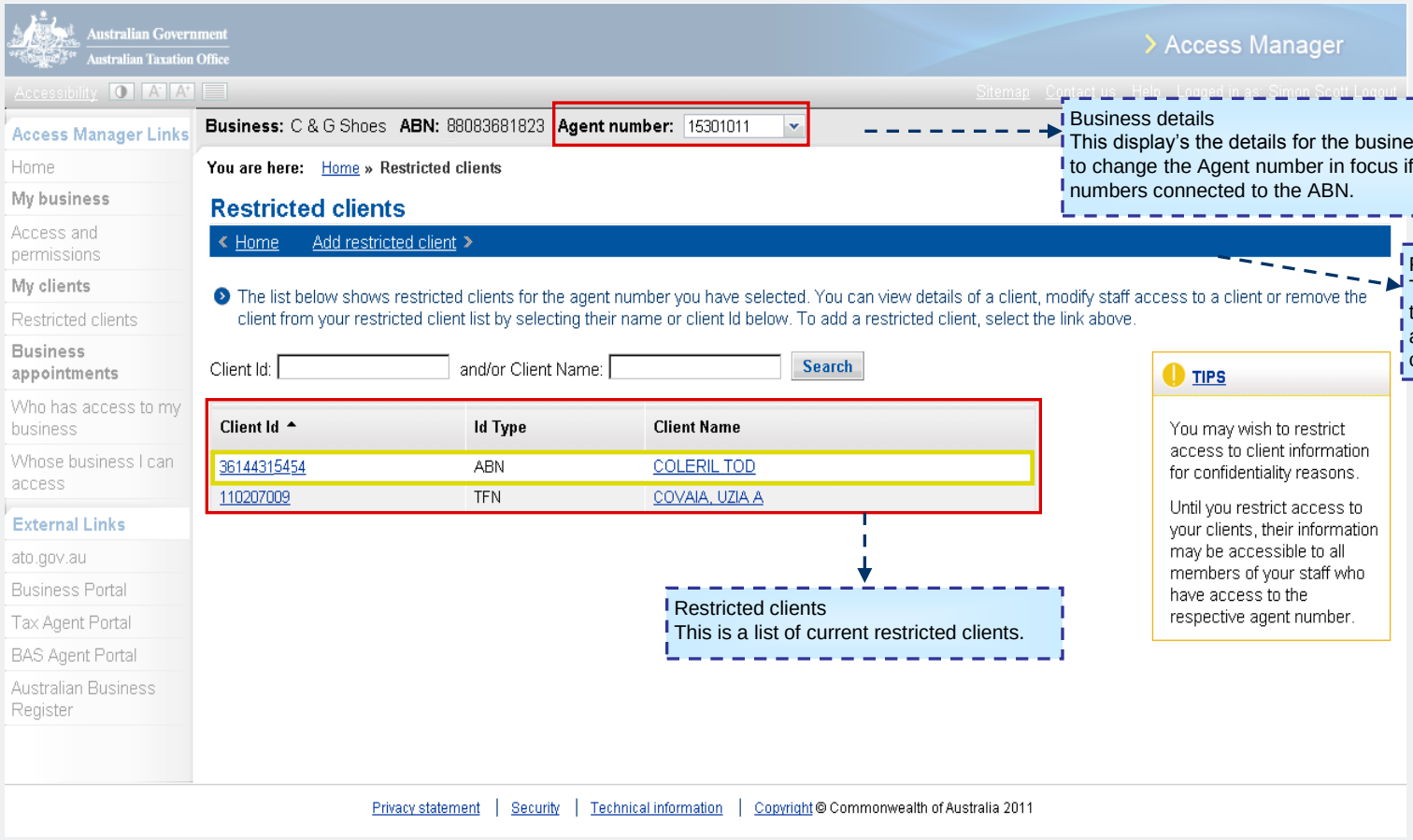
Australian Taxation Office

Scenario – Manage who can access a restricted client



Step 2

- Select an Agent number from the 'Agent number' drop down box; and
- Select a restricted client from the list



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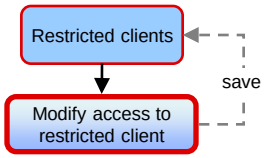
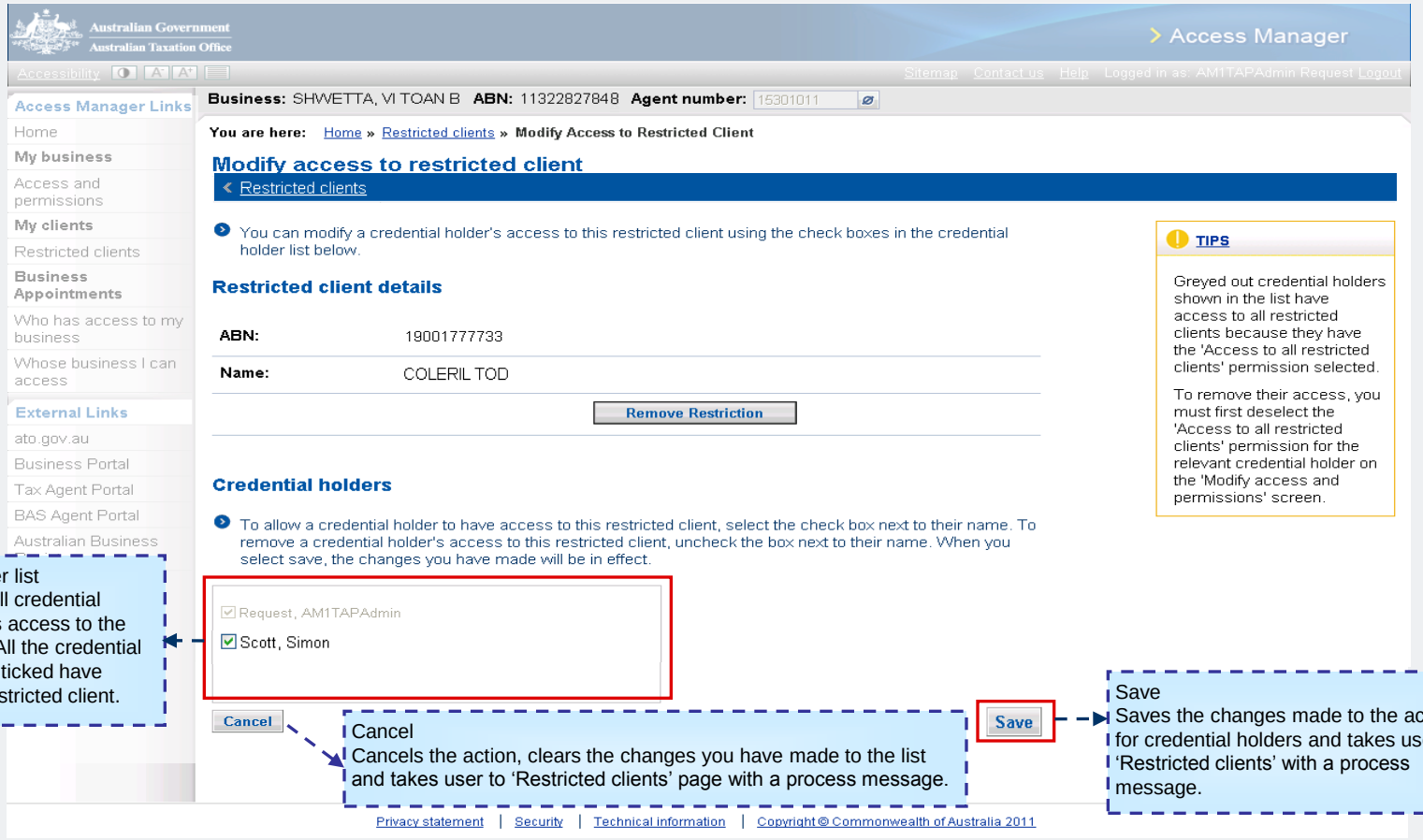
Access Manager

Australian Government
Australian Taxation Office

Scenario – Manage who can access a restricted client



Step 3 - Select one or more credential holders who require access to the restricted client



Credential holder list
This is a list of all credential holders who has access to the Agent number. All the credential holders that are ticked have access to the restricted client.

Cancel
Cancels the action, clears the changes you have made to the list and takes user to 'Restricted clients' page with a process message.

Save
Saves the changes made to the access for credential holders and takes user to 'Restricted clients' with a process message.

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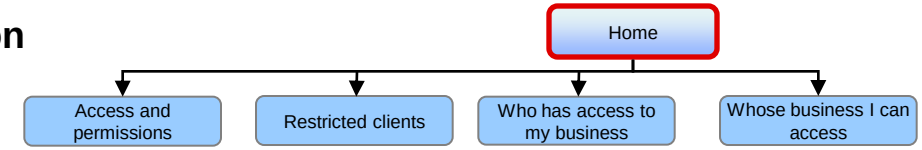
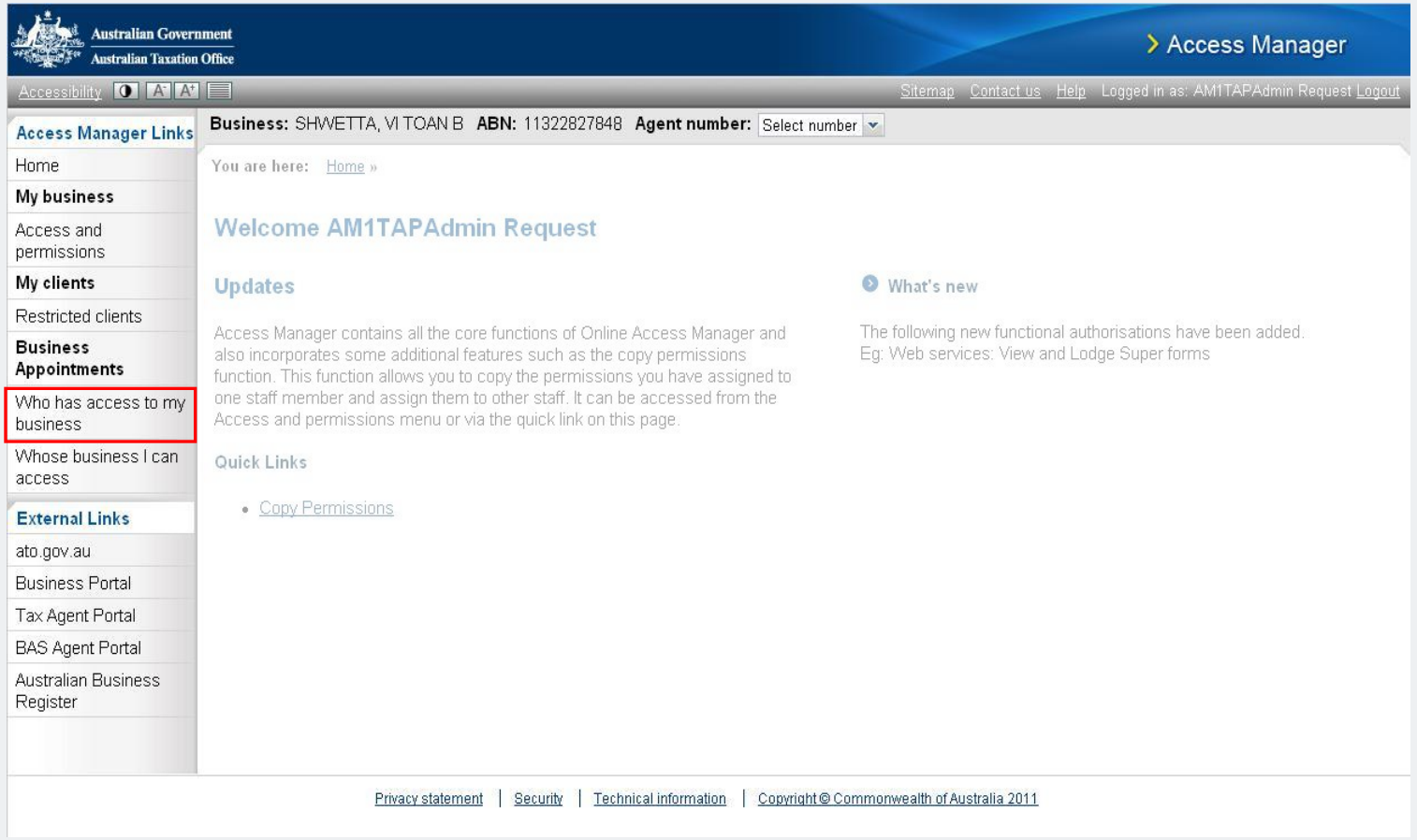
Access Manager

Australian Government
Australian Taxation Office

Scenario - Appoint a business and assign permission



Step 1 - Select ‘Who has access to my business’ from the left hand menu



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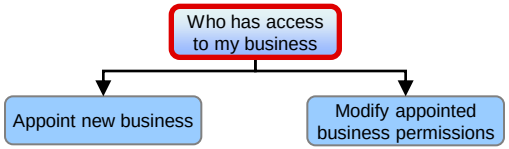
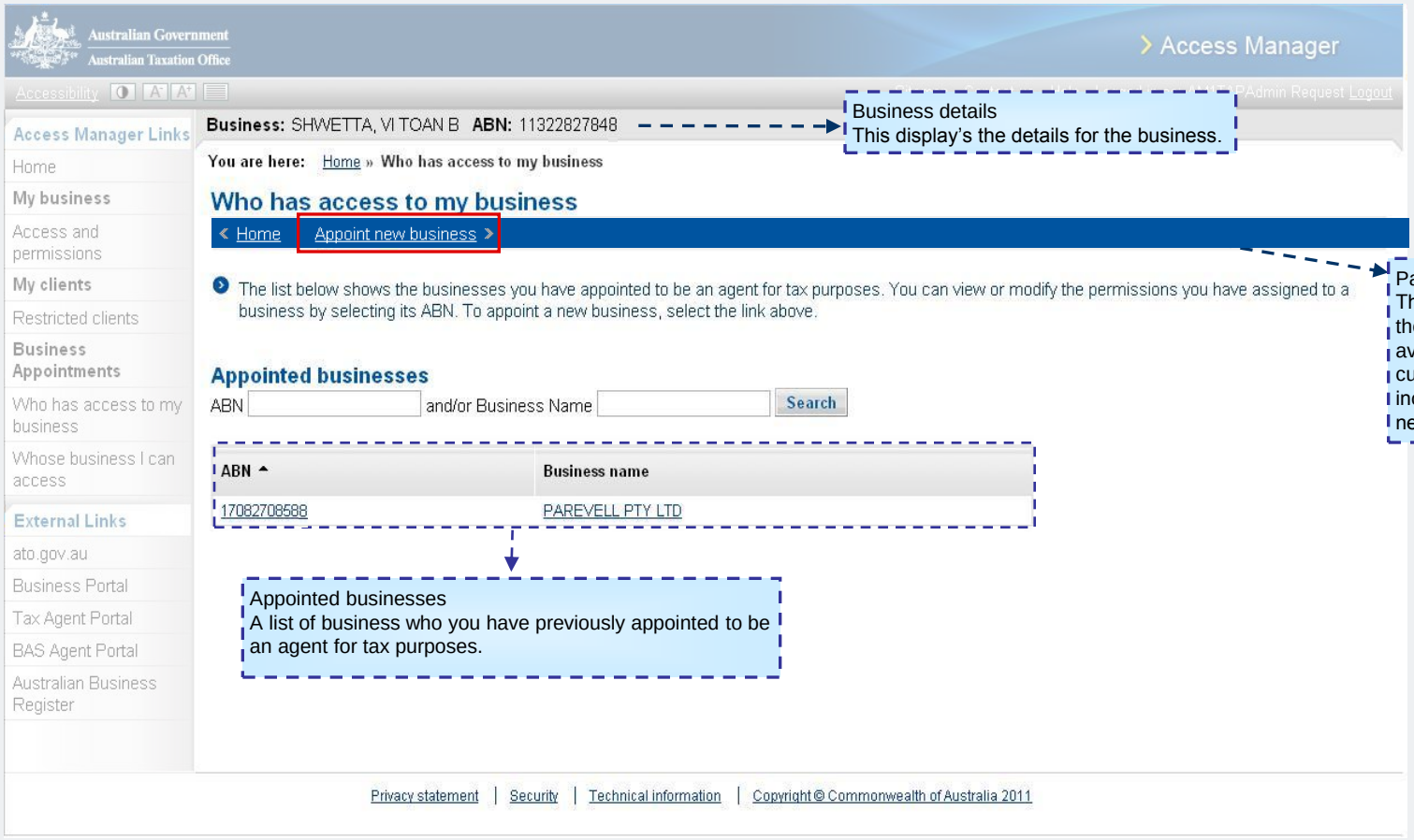
Scenario - Appoint a business and assign permission



Step 2 - Select 'Appoint new business' from page level menu



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Access Manager

Australian Government
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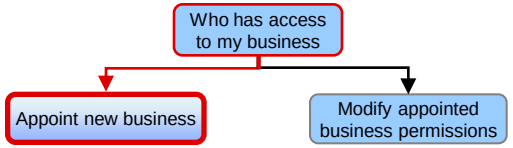
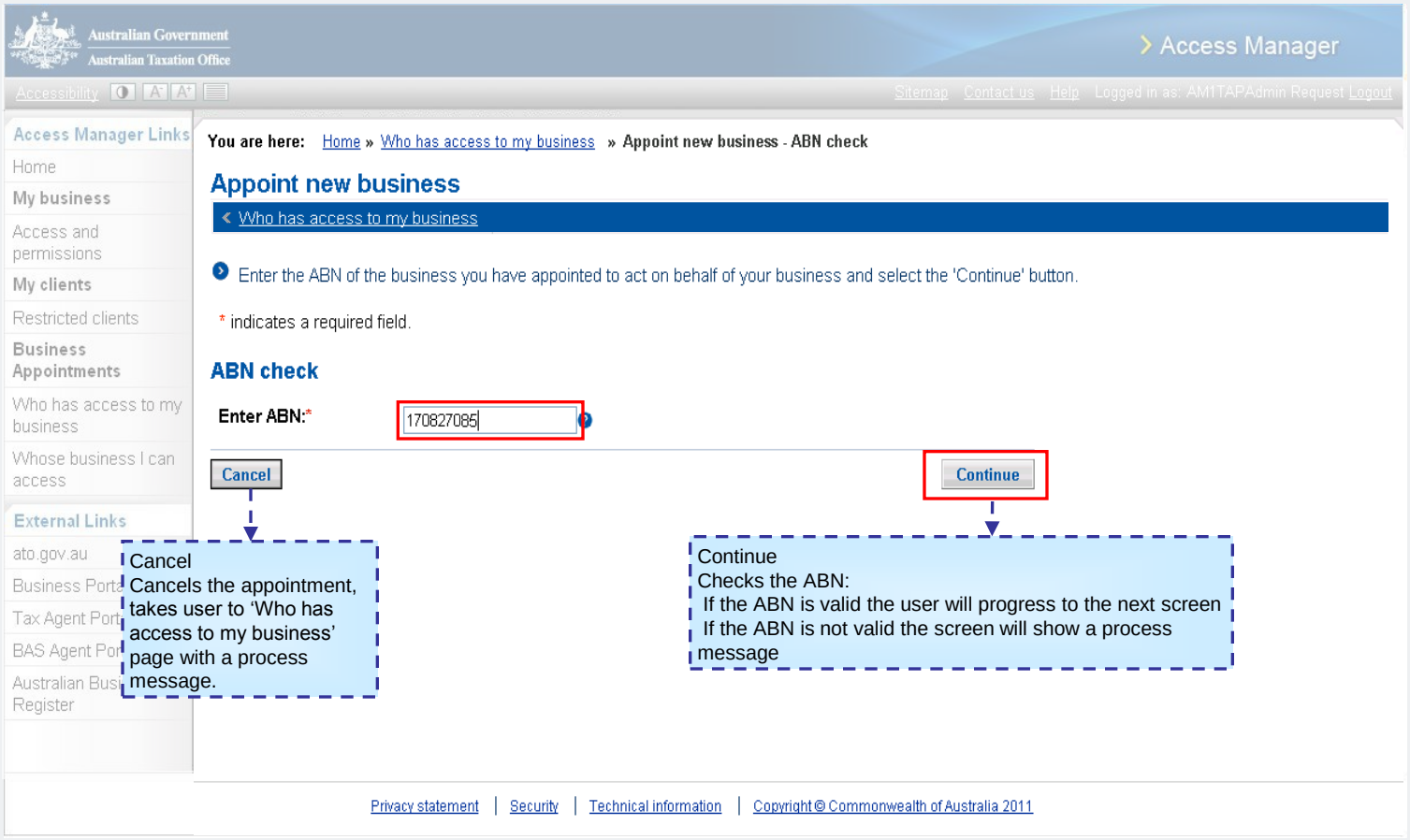
Scenario - Appoint a business and assign permission



Step 3 - Enter the ABN for the business you want to appoint



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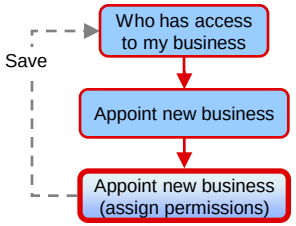
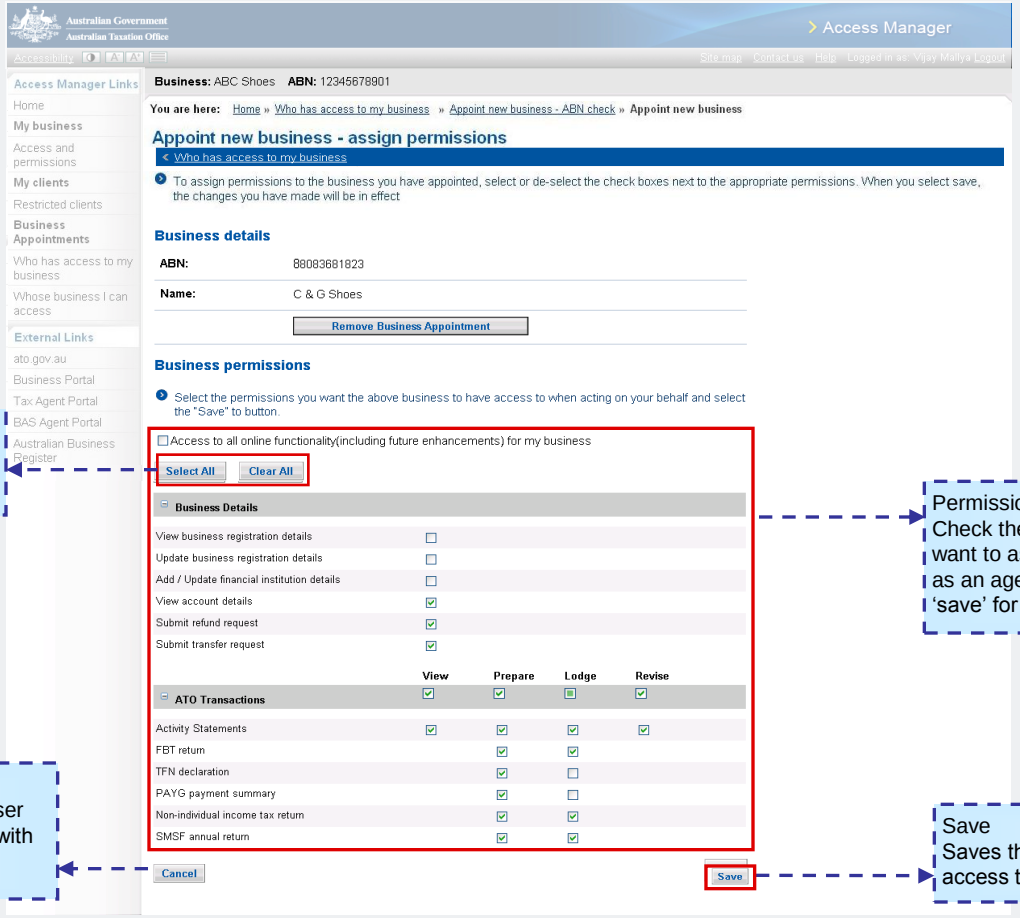
Access Manager

Australian Government
Australian Taxation Office

Scenario - Appoint a business and assign permission



Step 4 – Assign permissions



Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Check the checkbox aligned with the permission you want to assign to the business you have appointed as an agent for your tax affairs. You must select 'save' for the changes to take effect

Cancel
Cancels any permissions granted, takes user to 'Who has access to my business' page with a process message.

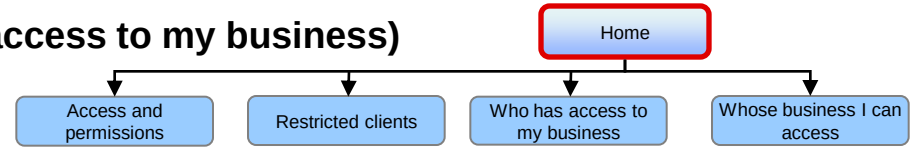
Save
Saves the permissions, takes user to 'Who has access to my business' with a process message.

Home

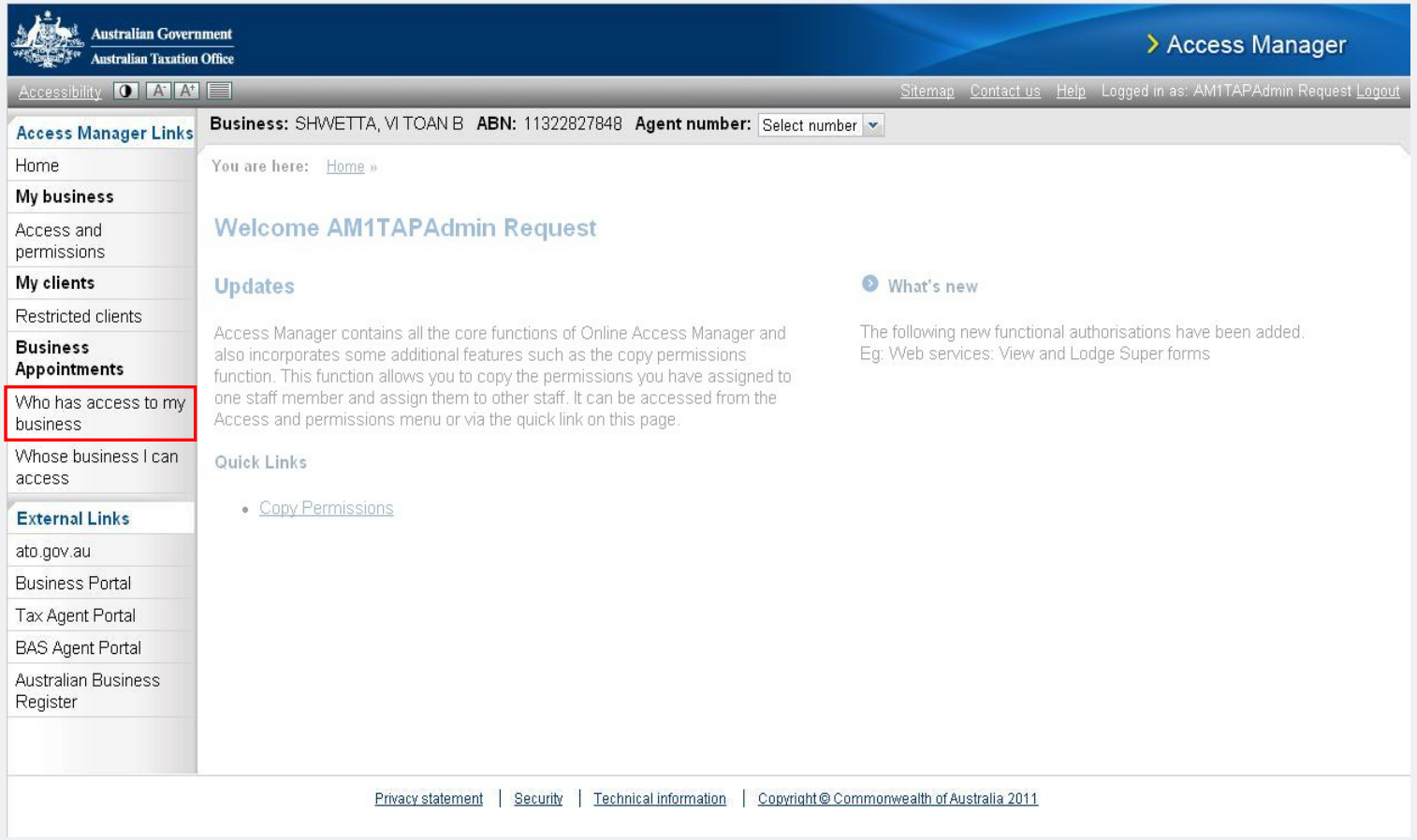
Access Manager

Australian Government
Australian Taxation Office

Scenario – Modify business appointment (Who has access to my business)



Step 1 - Select ‘Who has access to my business’ from the left hand menu



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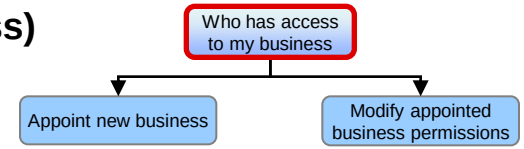
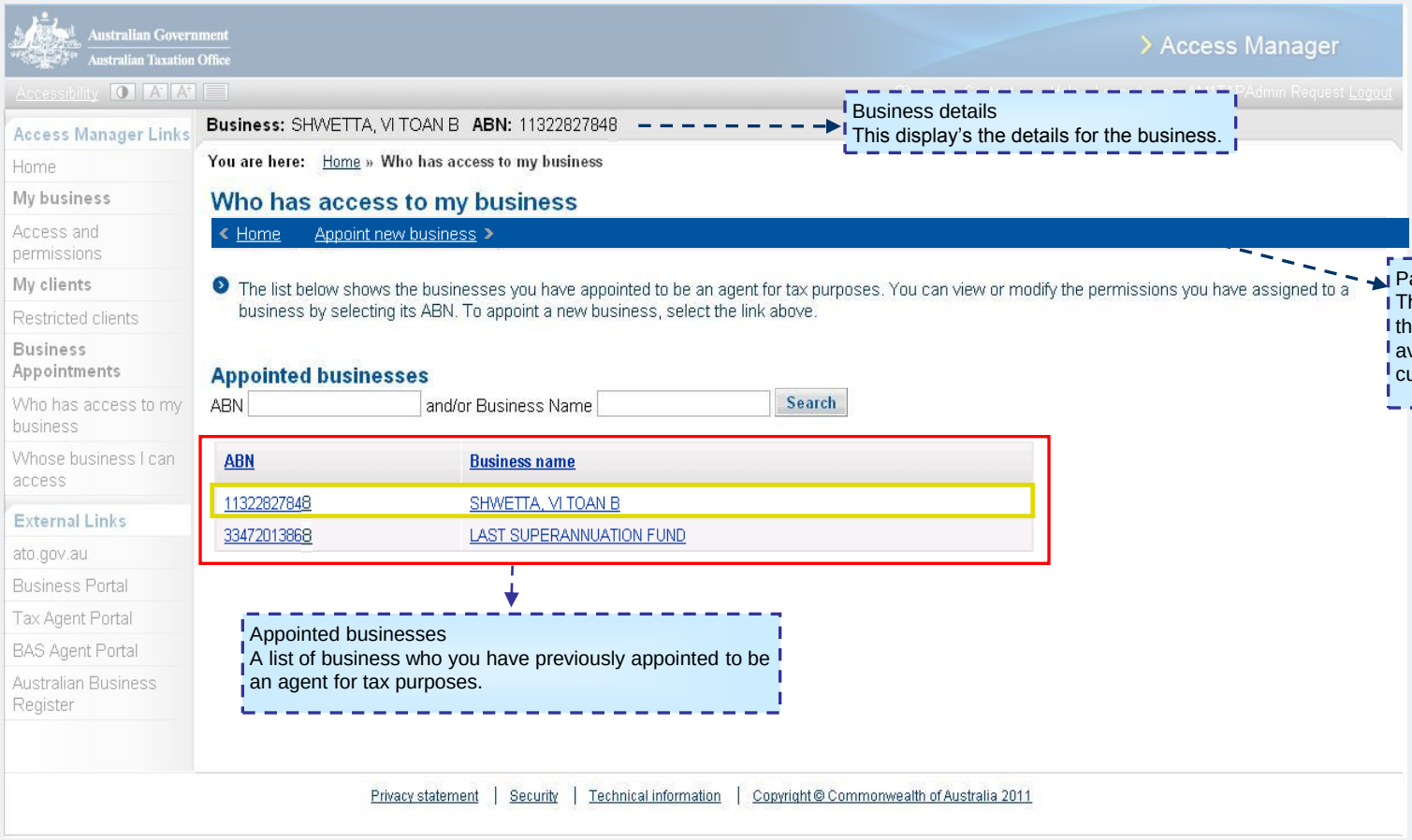
Australian Government
Australian Taxation Office

Scenario - Modify business appointment (Who has access to my business)



Step 2 - Select the appointed business



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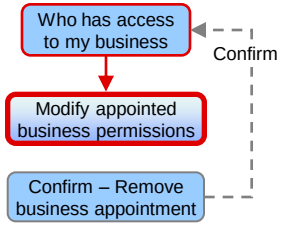
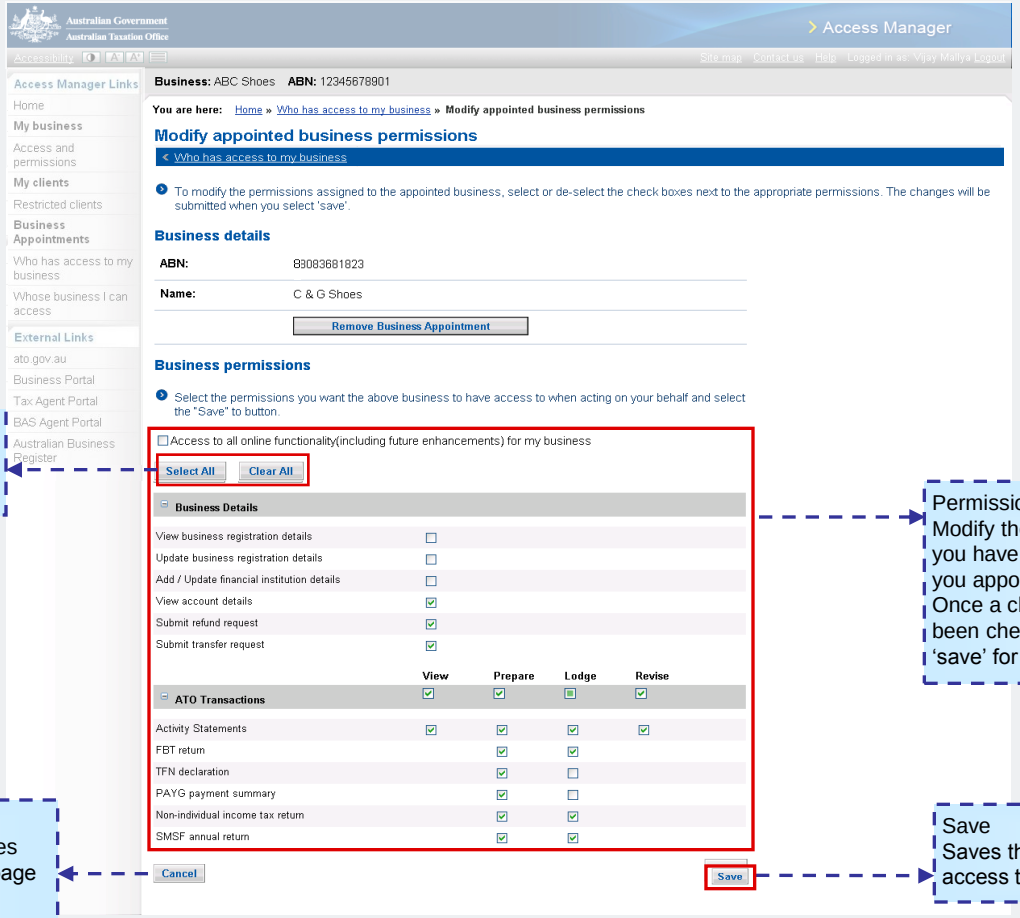
Australian Government
Australian Taxation Office

Scenario - Modify business appointment (Who has access to my business)



Step 3 – Modify appointed business permissions



Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Modify the appointed business permissions that you have previously assigned to the business you appointed as agent for your tax affairs.
Once a checkbox aligned with a permission has been checked or unchecked, you must select 'save' for the changes to take effect

Cancel
Cancels any changes you have made, takes user to 'Who has access to my business' page with a process message.

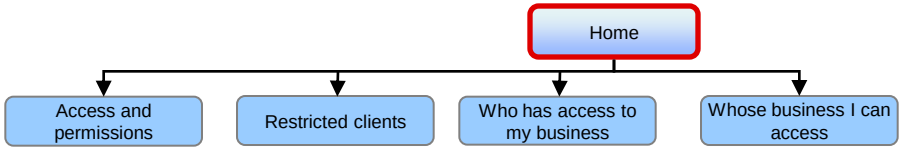
Save
Saves the permissions, takes user to 'Who has access to my business' with a process message.

Home

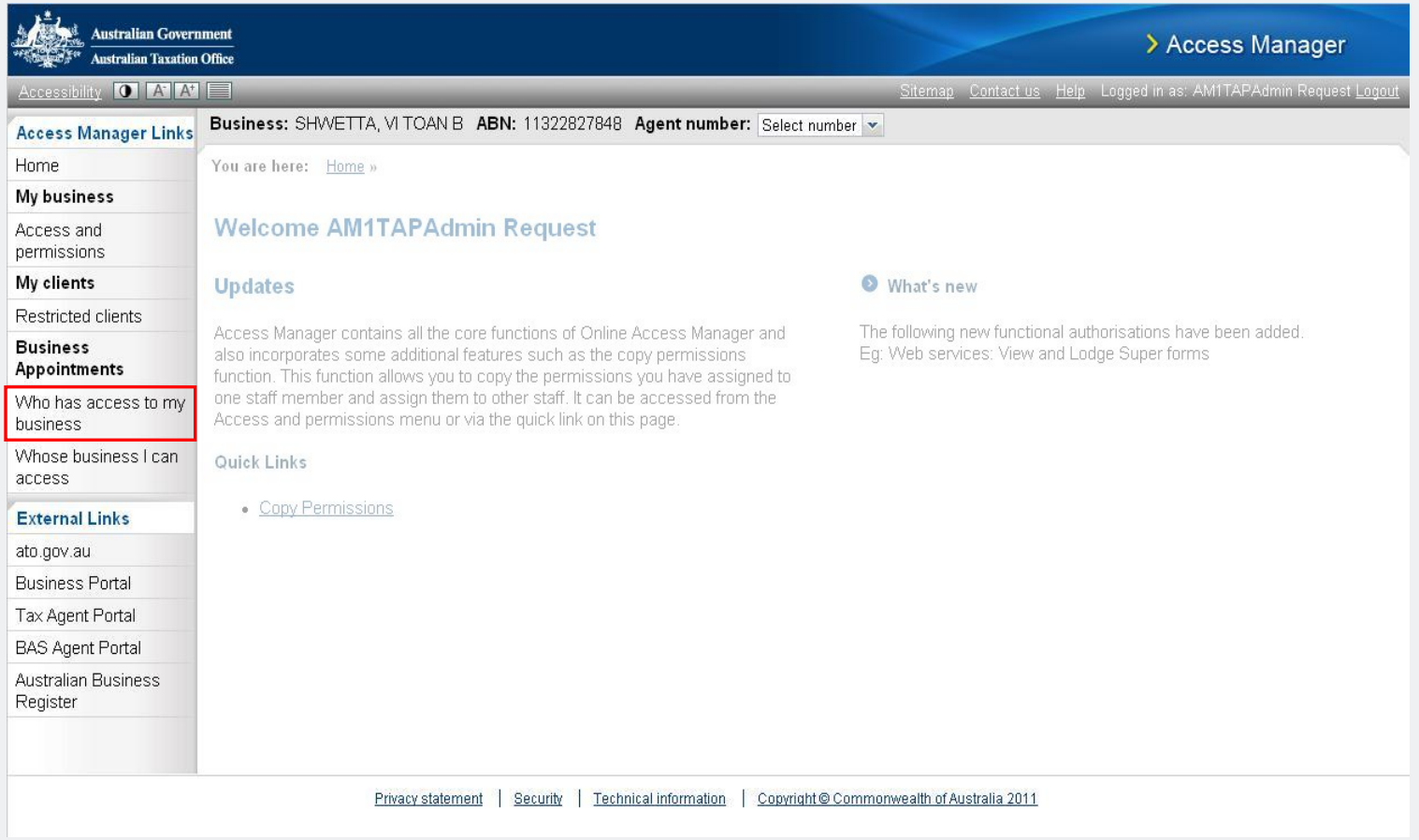
Access Manager

Australian Government
Australian Taxation Office

Scenario – Modify or Remove business appointment (Who has access to my business)



Step 1 - Select ‘Who has access to my business’



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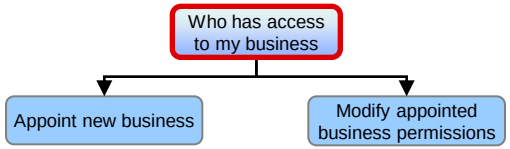
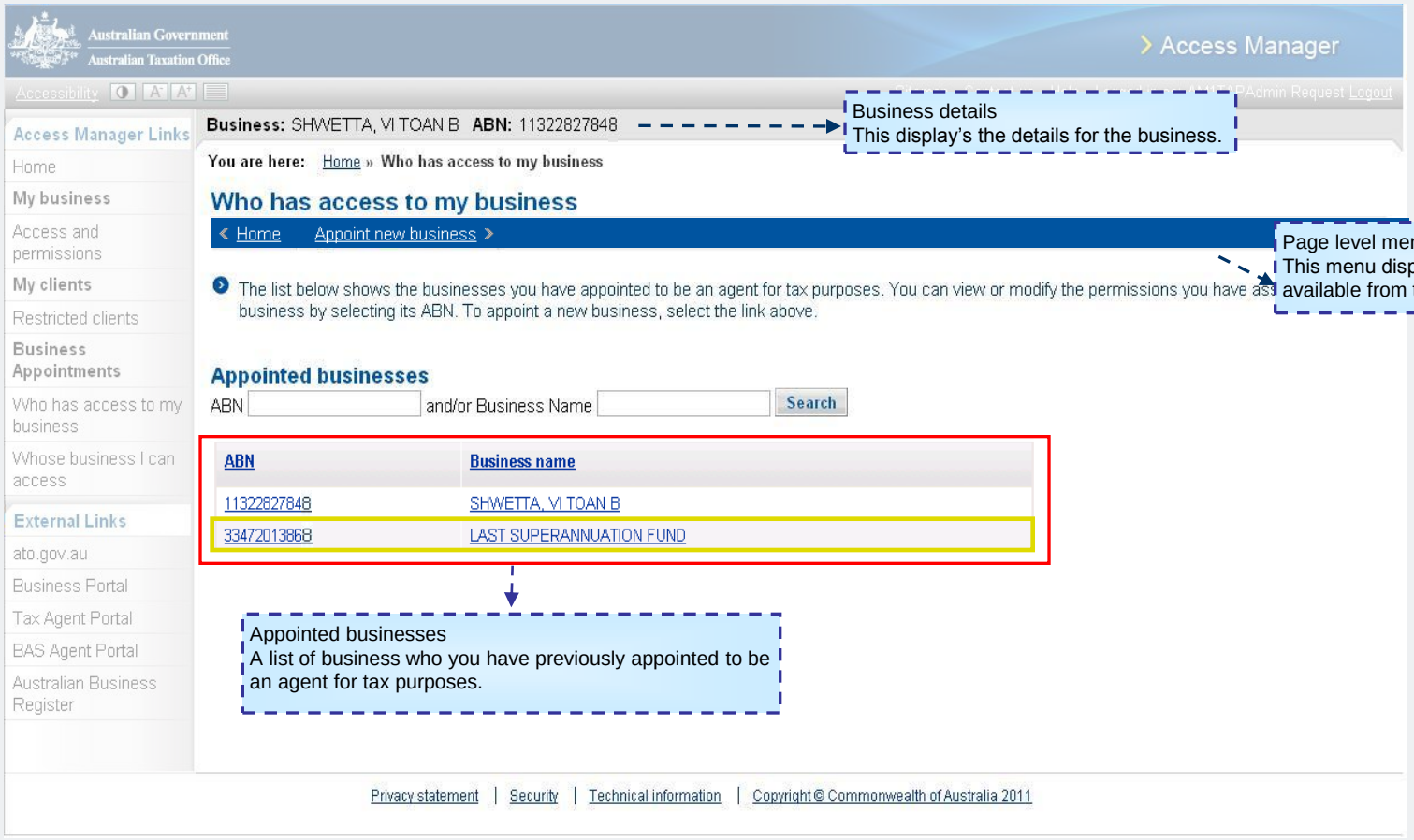
Australian Government
Australian Taxation Office

Scenario – Modify or Remove business appointment (Who has access to my business)



Step 2 - Select the appointed business



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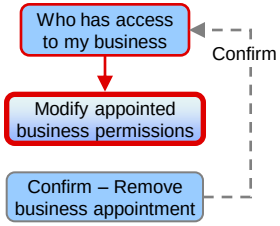
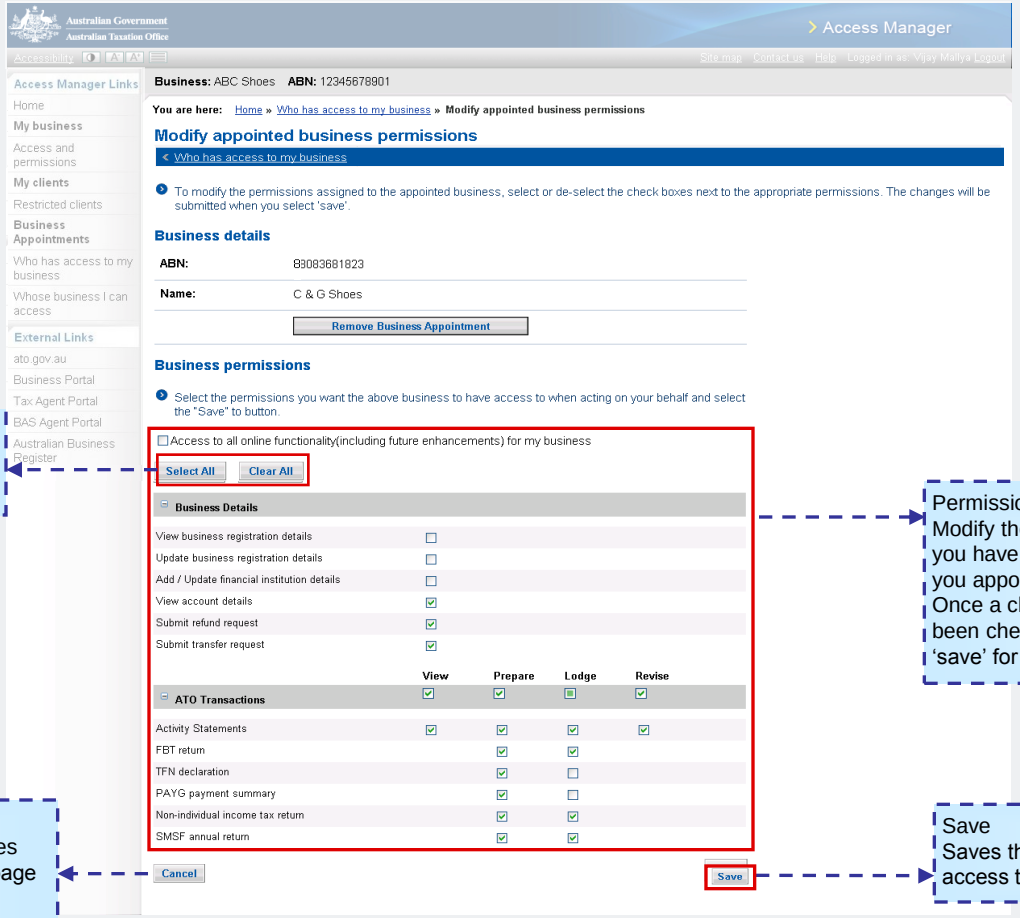
Australian Government
Australian Taxation Office

Scenario – Modify or remove business appointment (Who has access to my business)



Step 3a – Modify appointed business permissions



Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Modify the appointed business permissions that you have previously assigned to the business you appointed as agent for your tax affairs.
Once a checkbox aligned with a permission has been checked or unchecked, you must select 'save' for the changes to take effect

Cancel
Cancels any changes you have made, takes user to 'Who has access to my business' page with a process message.

Save
Saves the permissions, takes user to 'Who has access to my business' with a process message.

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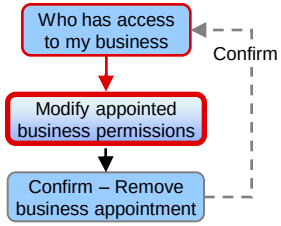
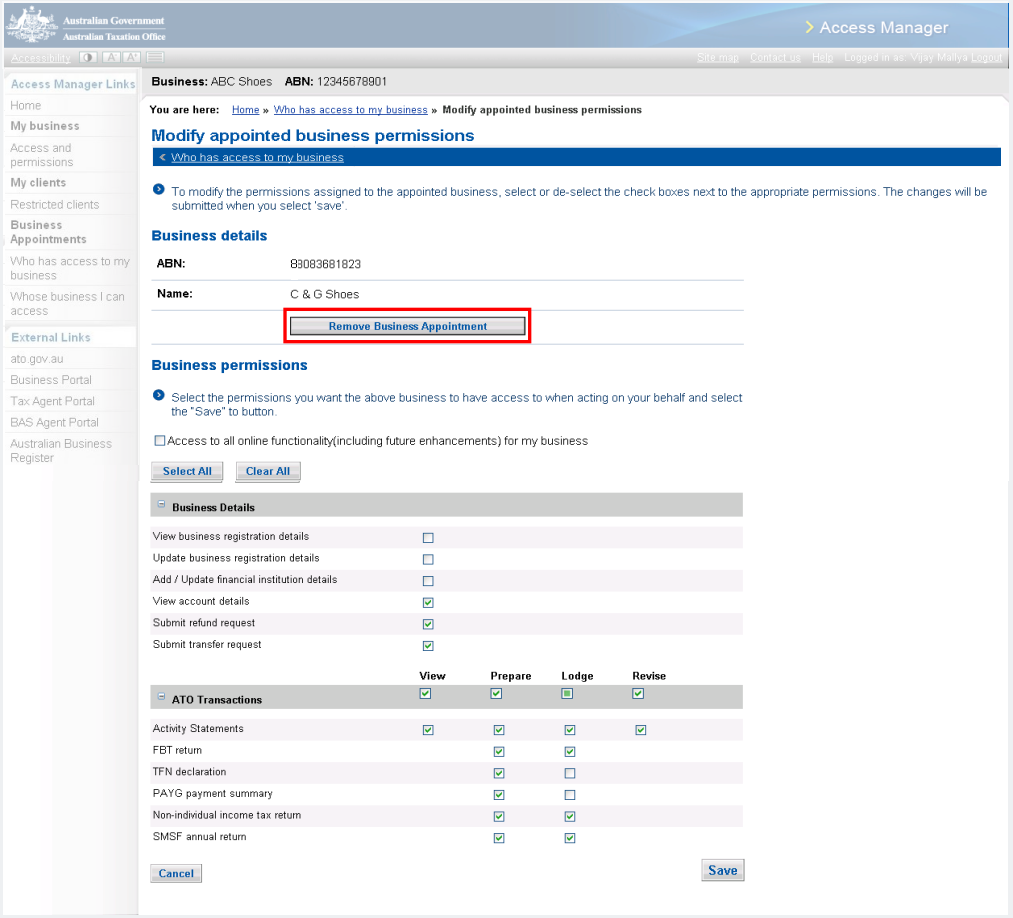
Access Manager

Australian Government
Australian Taxation Office

Scenario – Modify or remove business appointment (Who has access to my business)



Step 3b – Remove business appointment. Select 'Remove Business Appointment'



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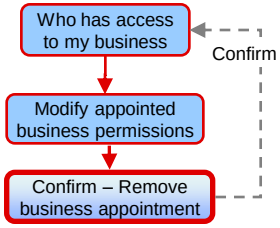
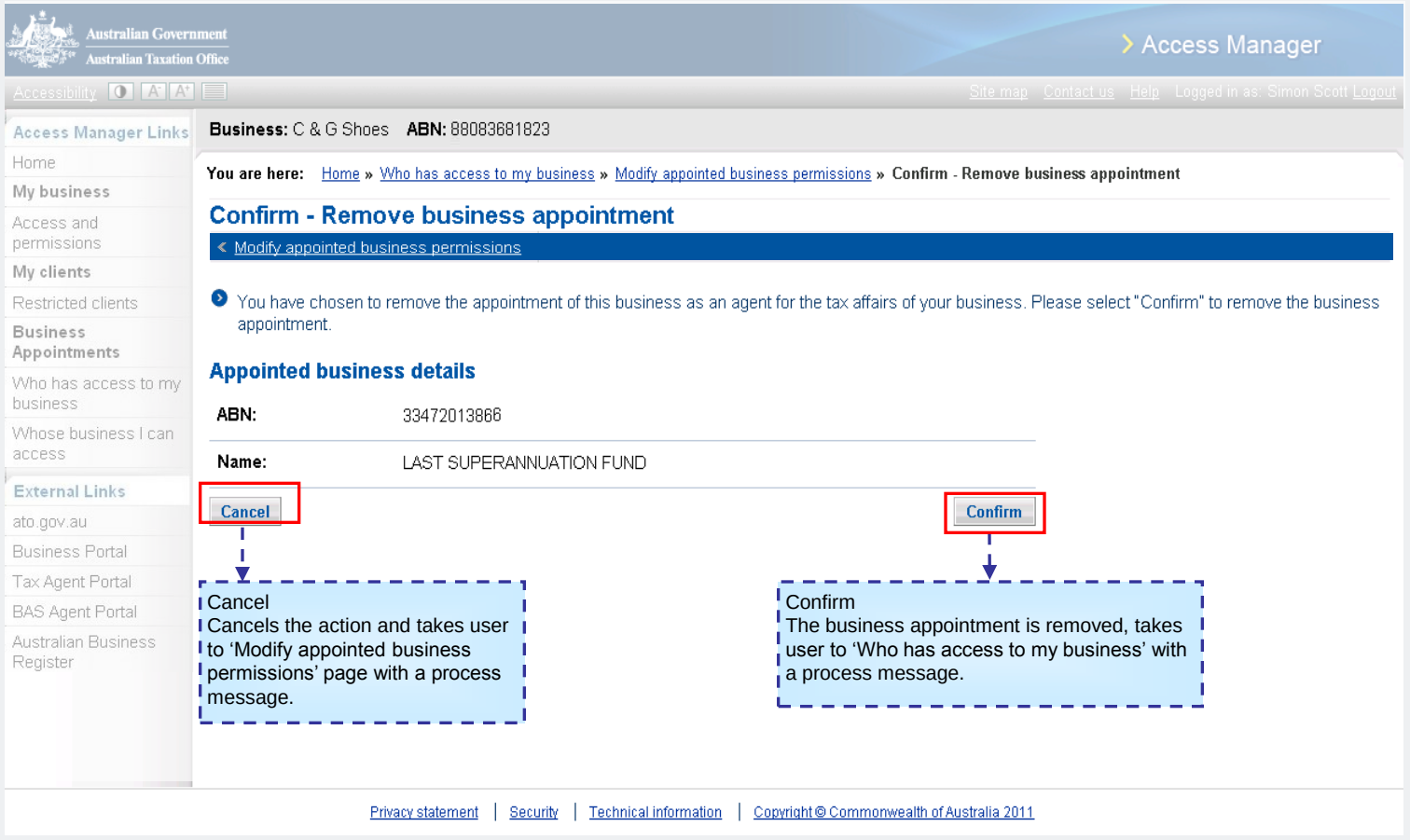
Australian Taxation Office

Scenario – Modify or remove business appointment (Who has access to my business)



Step 4 – Select ‘Confirm’ to remove the business appointment



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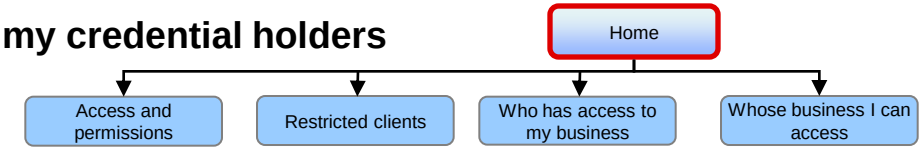
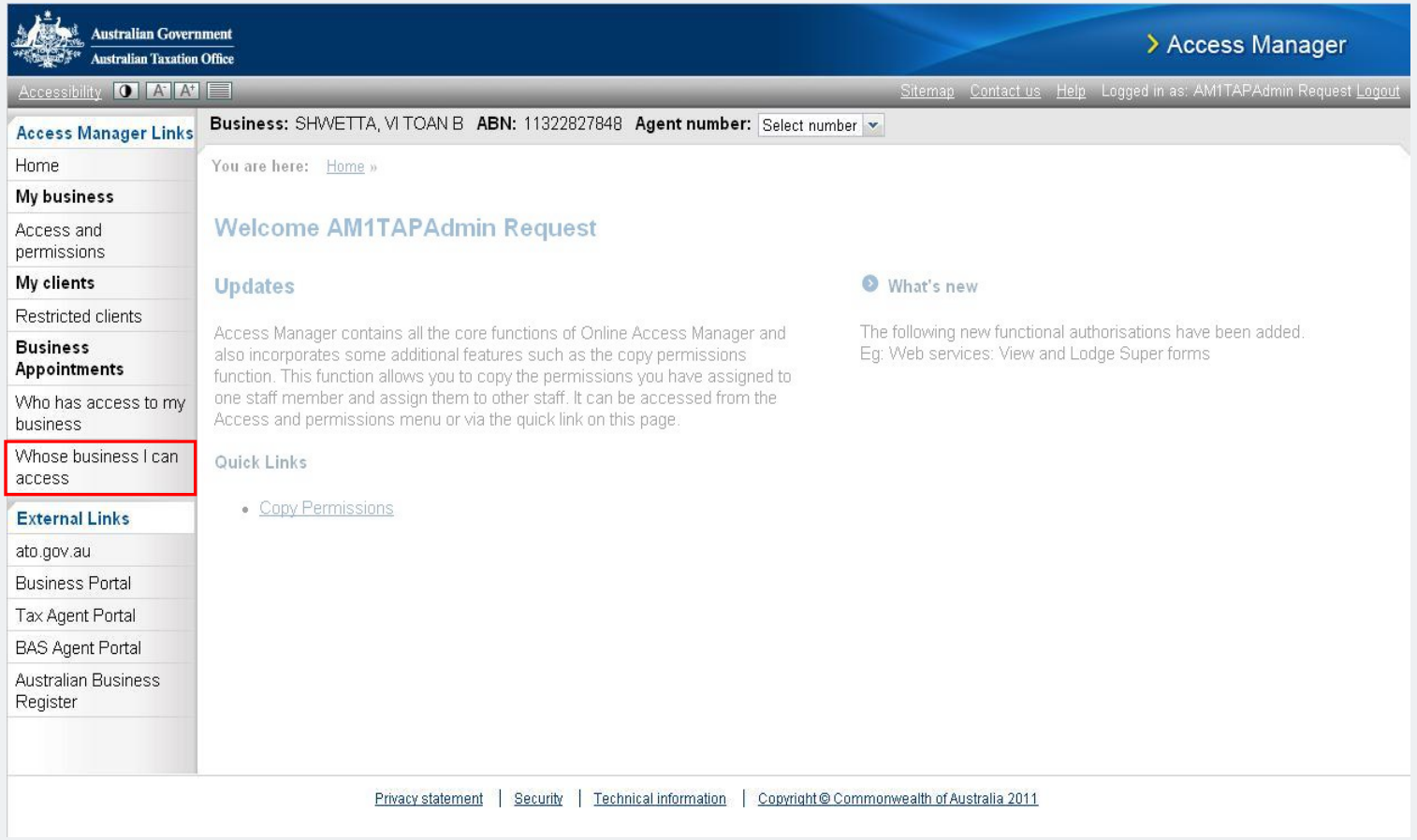
Access Manager

Australian Government
Australian Taxation Office

Scenario - Assign access to appointed business for my credential holders



Step 1 - Select ‘Whose business I can access’ from the left hand menu



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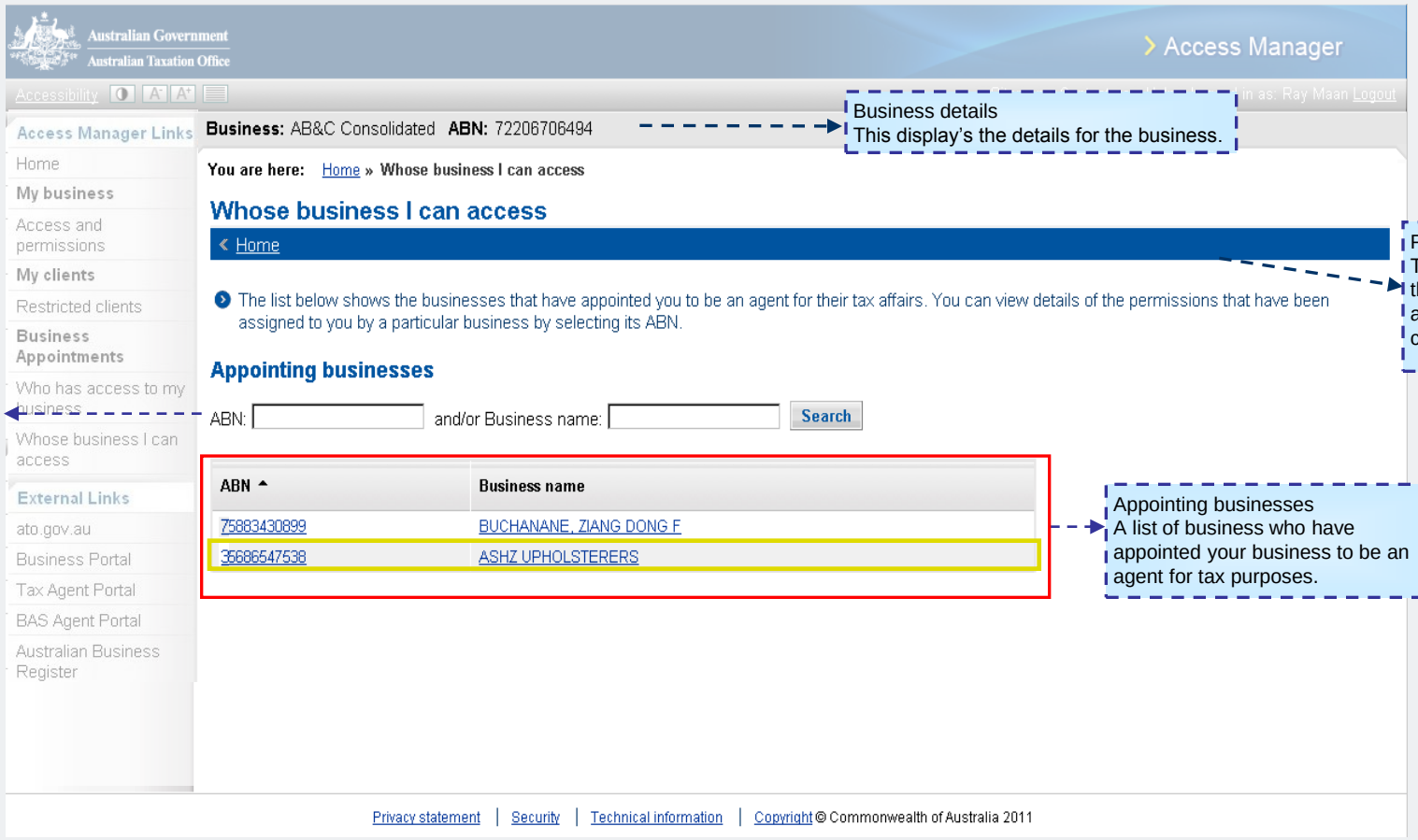
Access Manager

Australian Government
Australian Taxation Office

Scenario - Assign access to my credential holders for appointing business

Whose business I can access
↓
View permissions granted to business

Step 2 – Select the business you want to assign access to.



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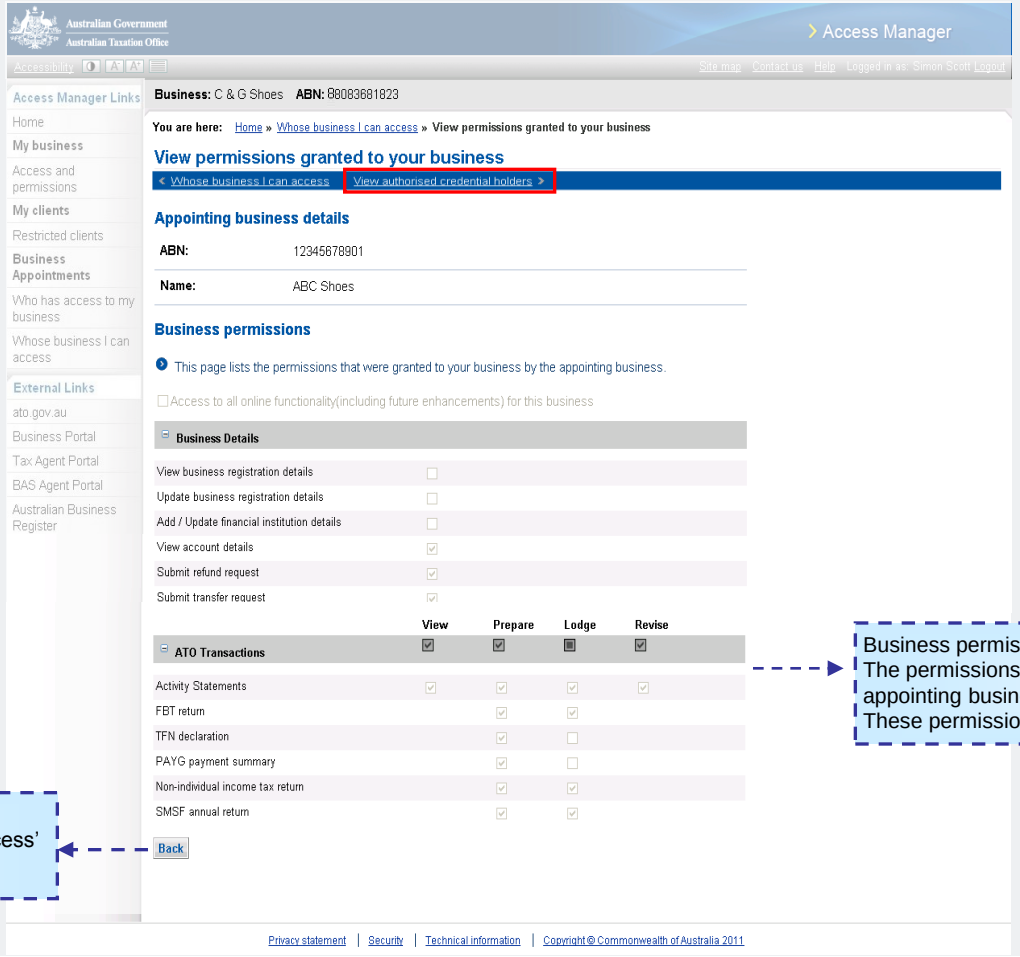
Access Manager

Australian Government
Australian Taxation Office

Scenario - Assign access to my credential holders for appointing business

Whose business I can access
→ View permissions granted to business
→ View authorised credential holders

Step 3 – Select ‘View authorised credential holders’ from the page level menu



Business permissions
The permissions which have been granted by the appointing business.
These permissions are read-only.

Back
Takes user to ‘Whose business I can access’ page.

Home

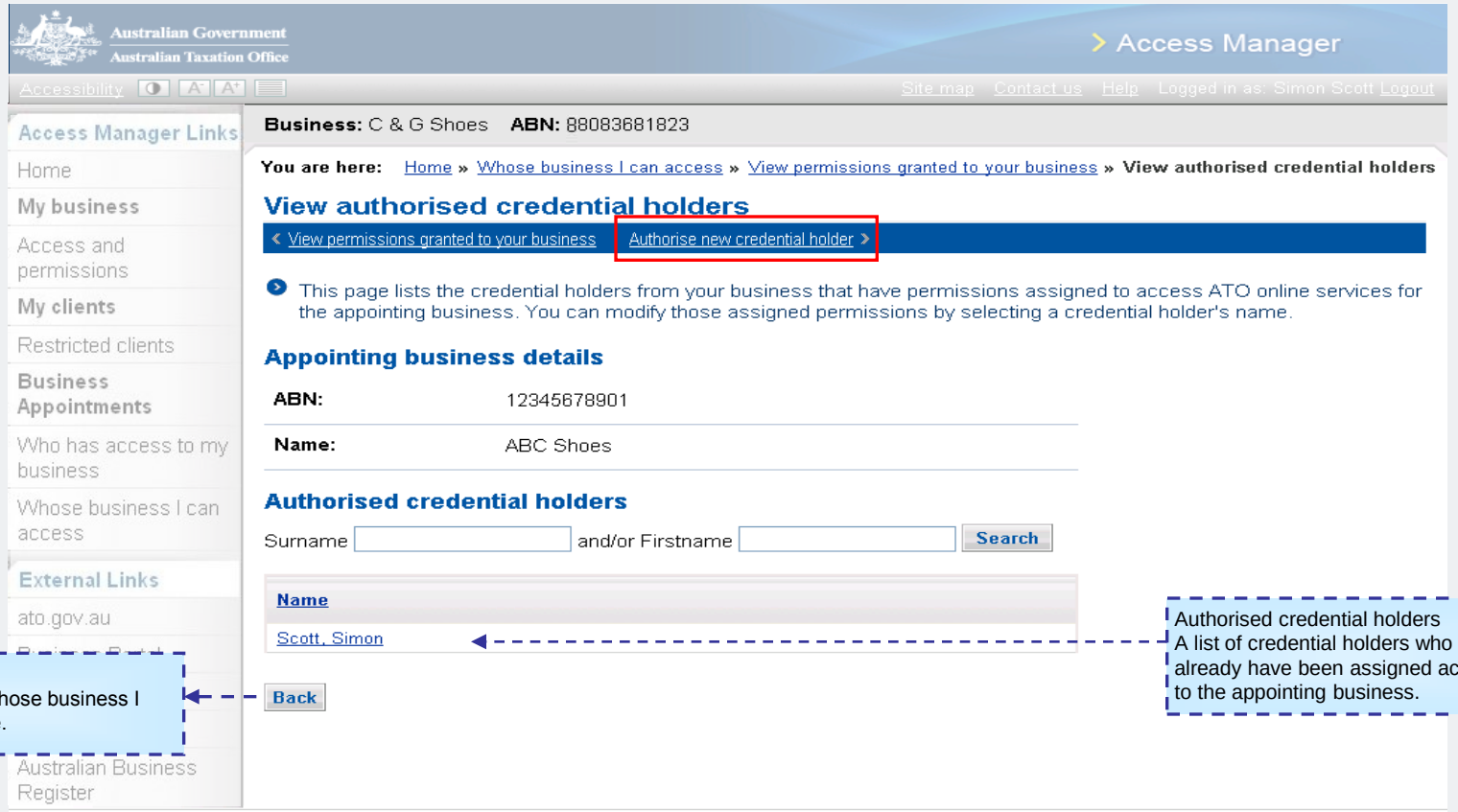
Access Manager

Australian Government
Australian Taxation Office

Scenario - Assign access to my credential holders for appointing business

Whose business I can access
→ View permissions granted to business
→ View authorised credential holders
→ Authorise new credential holder (Select credential holder)

Step 4 – Select 'Authorise new credential holder' from the page level menu



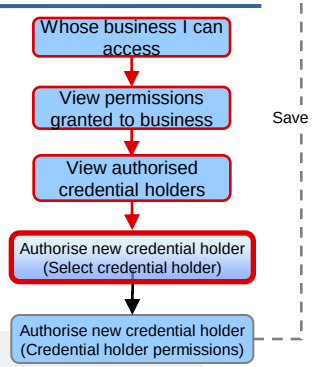
Back
Takes user to 'Whose business I can access' page.

Authorised credential holders
A list of credential holders who already have been assigned access to the appointing business.

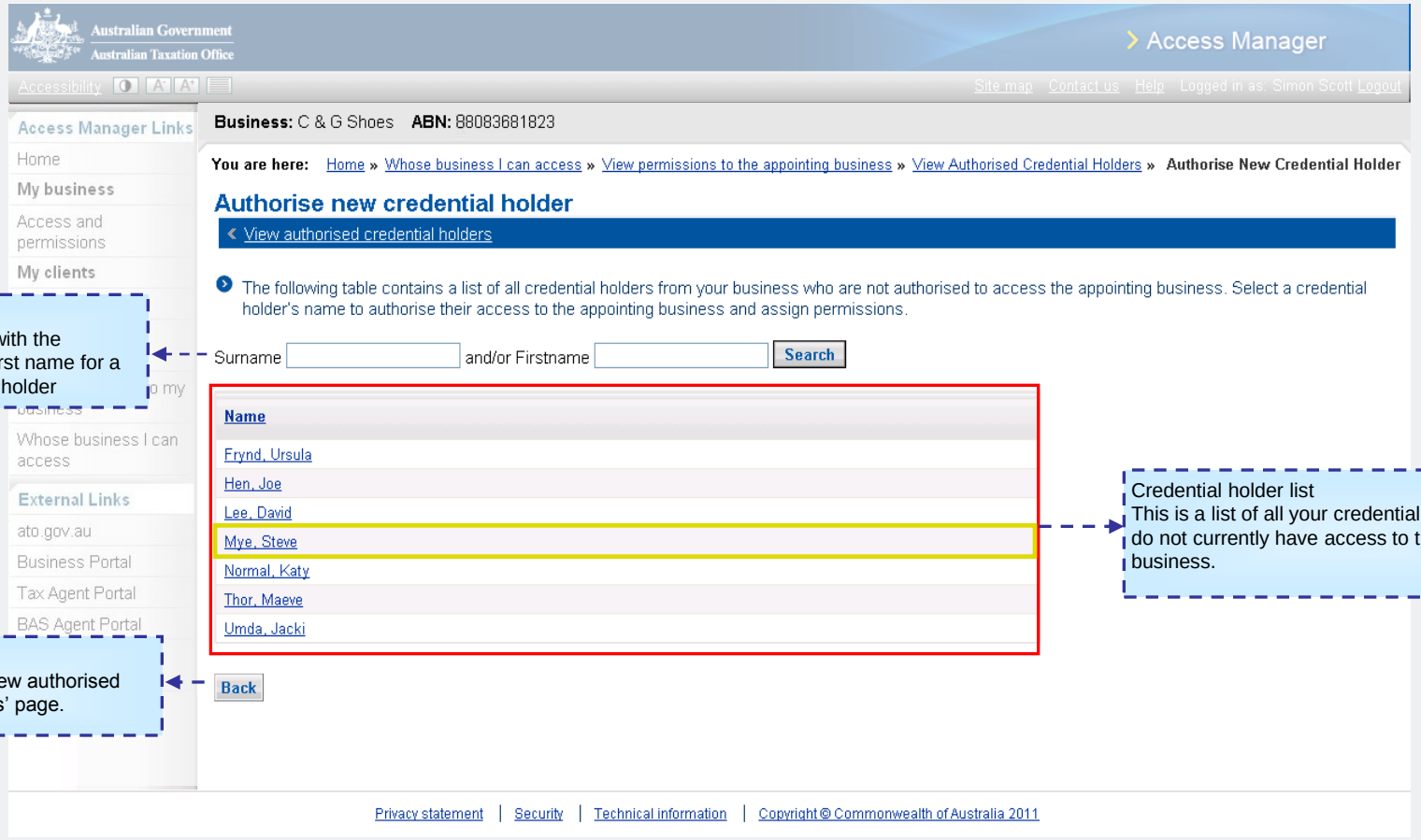
Home

Access Manager

Scenario - Assign access to my credential holders for appointing business



Step 5 – Select a credential holder in your business to assign access



Credential holder
Facility to search with the Surname or the First name for a specific credential holder

Credential holder list
This is a list of all your credential holders who do not currently have access to the appointing business.

Back
Takes user to 'View authorised credential holders' page.

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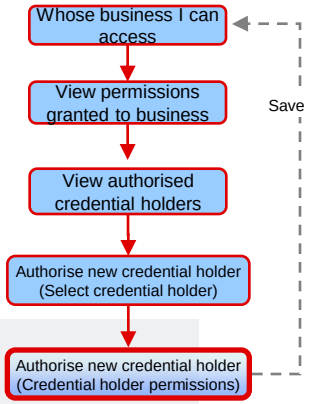
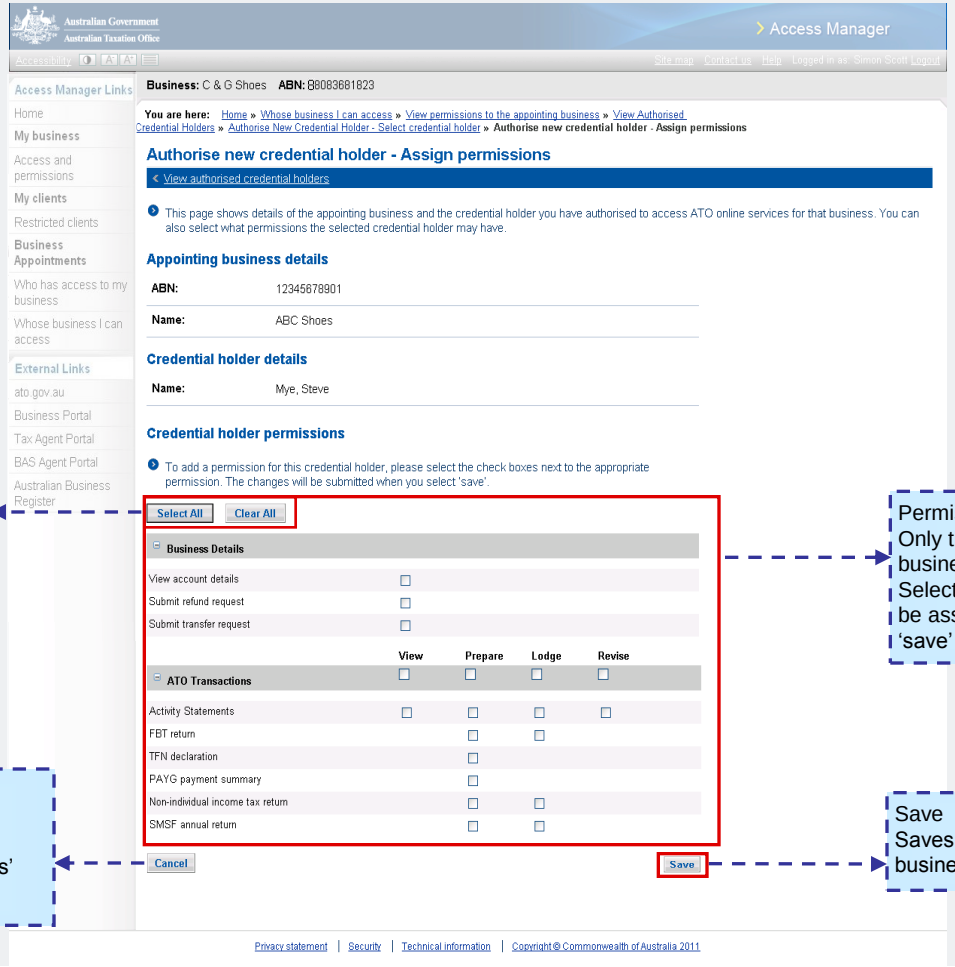
Australian Taxation Office

Scenario - Assign access to my credential holders for appointing business



Step 6 – Assign permissions to the credential holder you have selected.



Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Only the permissions allocated to the appointed business are displayed.
Select permissions using the checkboxes which will be assigned to the credential holder after you select 'save'

Cancel
Cancels the authorisation of the credential holder to access the appointing business, takes user to 'Whose business I can access' page with a process message.

Save
Saves the permissions, takes user to 'Whose business I can access' with a process message.

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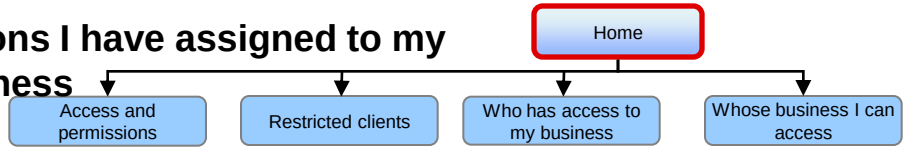
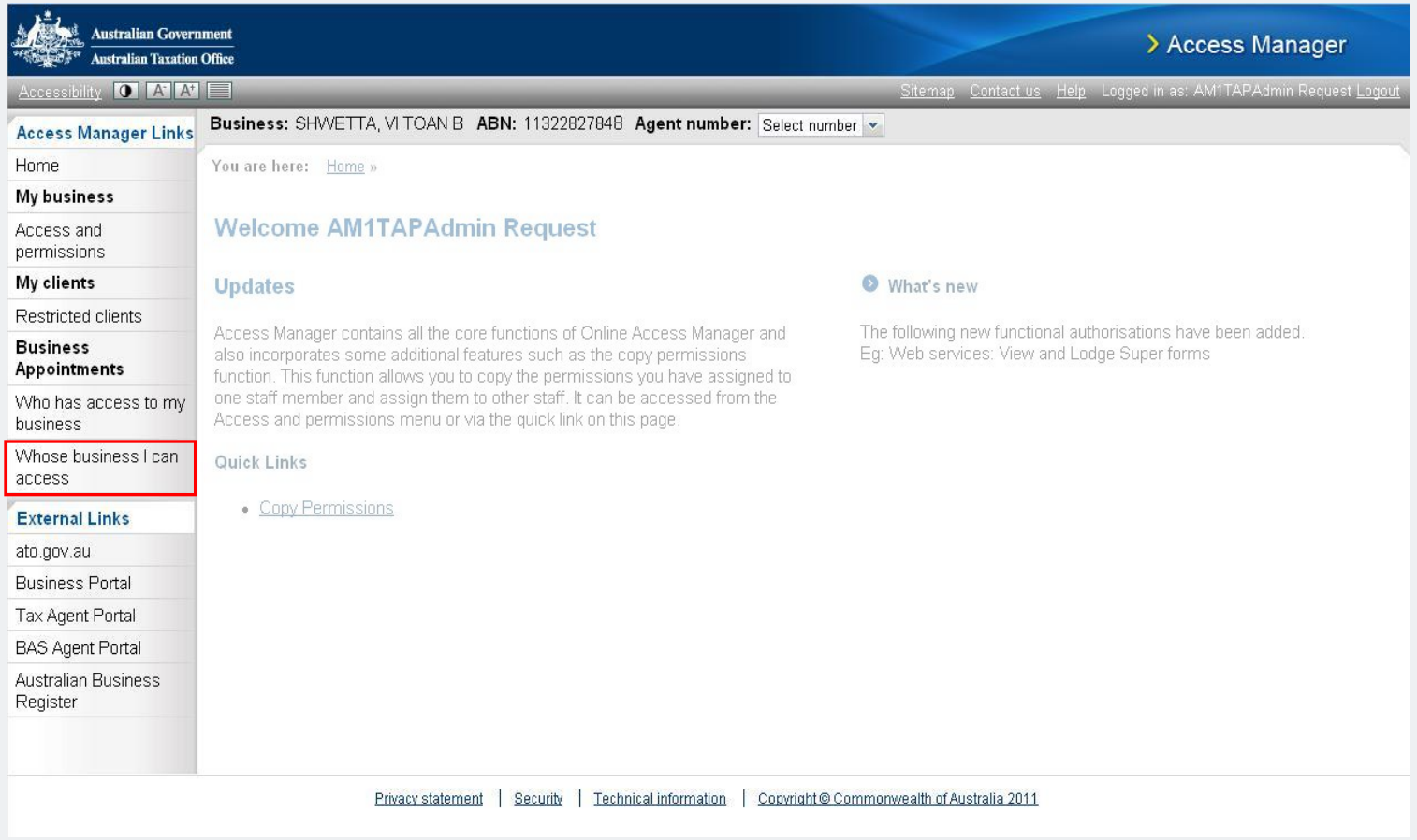
Access Manager

Australian Government
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business



Step 1 - Select ‘Whose business I can access’



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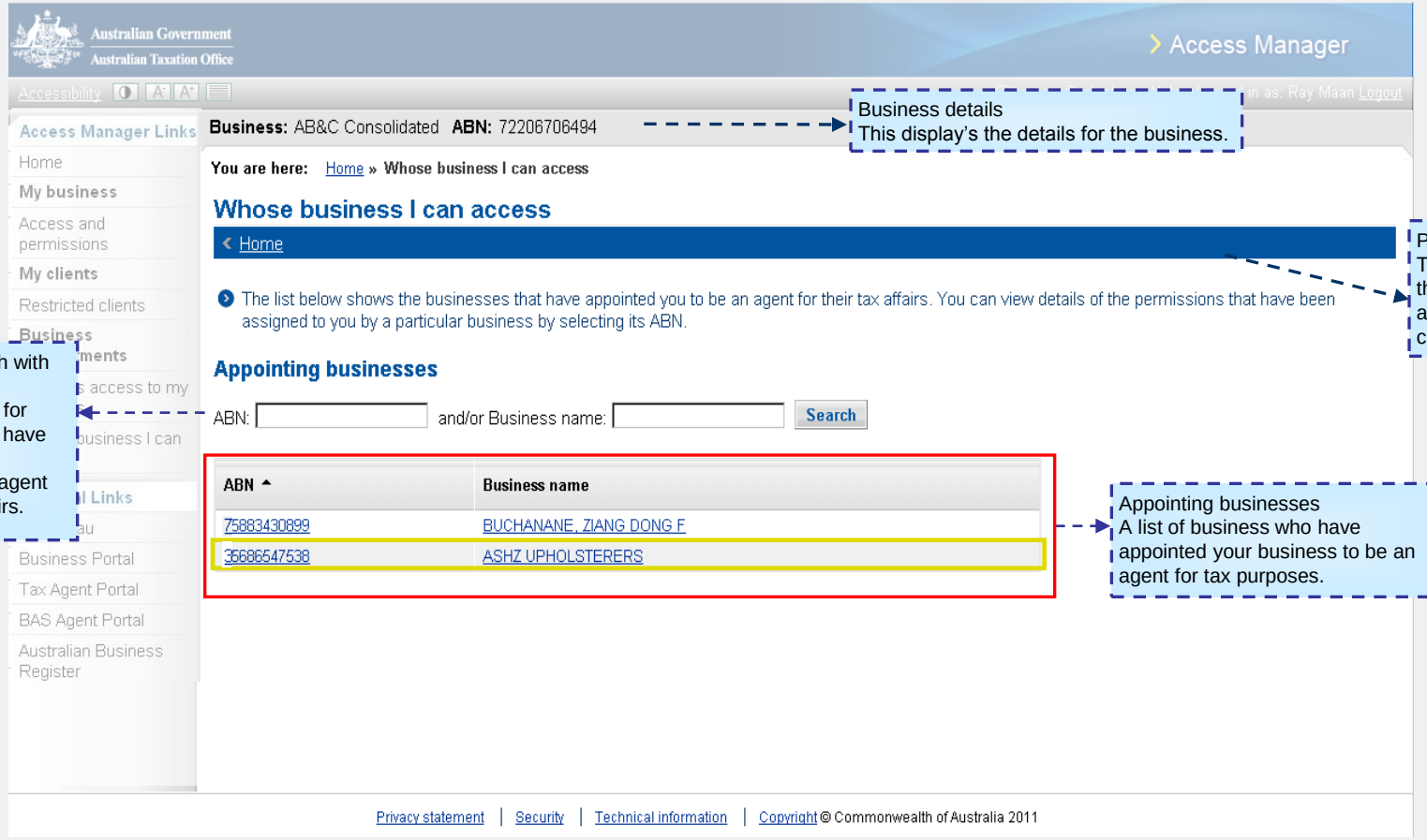
Access Manager

Australian Government
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business

Whose business I can access
↓
View permissions granted to business

Step 2 – Select the business to modify the permissions you have assigned to your credential holders



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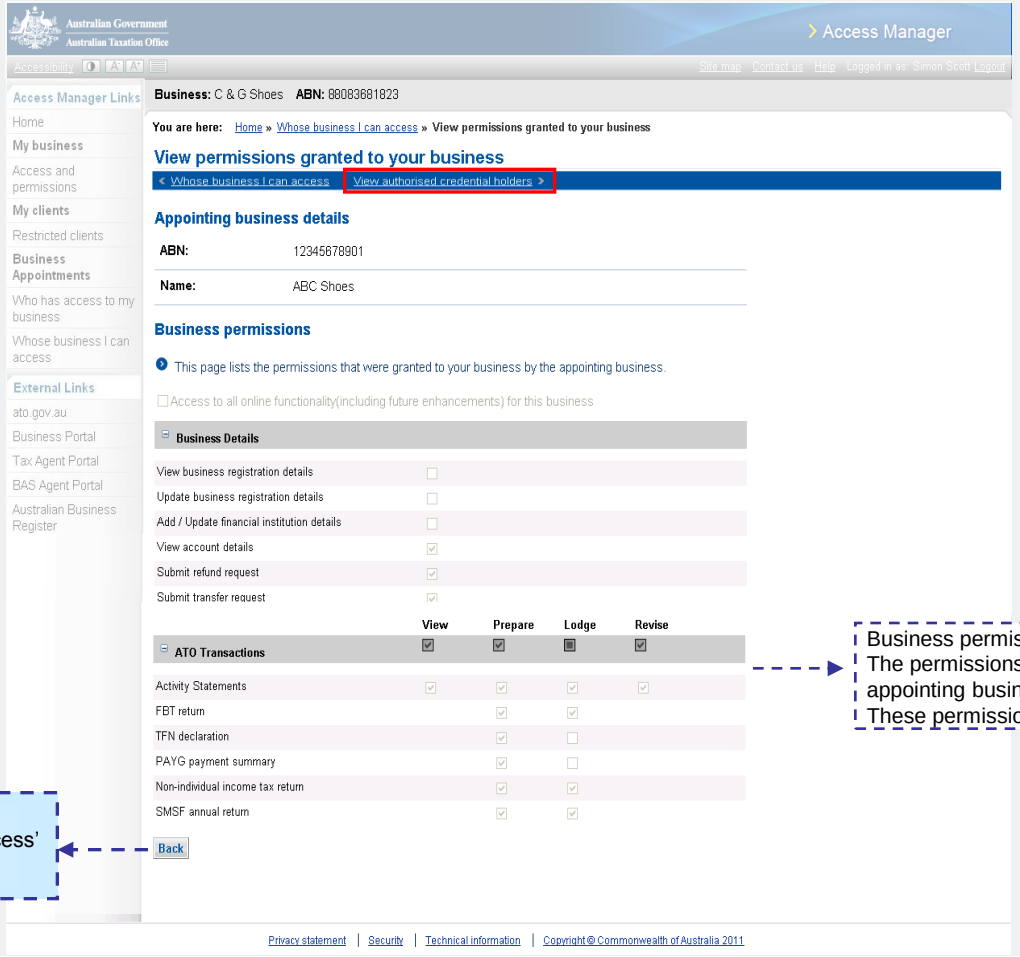
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business

Whose business I can access
→ View permissions granted to business
→ View authorised credential holders

Step 3 – Select ‘View authorised credential holders’ from the page level menu



Business permissions
The permissions which have been granted by the appointing business.
These permissions are read-only.

Back
Takes user to ‘Whose business I can access’ page.

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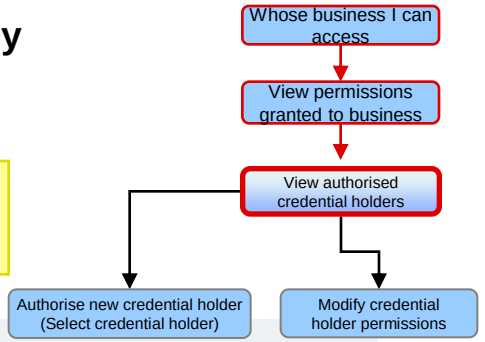
Access Manager

Australian Government
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business



Step 4 – Select a credential holder from the 'Authorised credential holders' list

Australian Government
Australian Taxation Office

Access Manager

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Access Manager Links
- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business Appointments
- Who has access to my business
- Whose business I can access

External Links
- ato.gov.au
- Australian Business Register

Business: C & G Shoes **ABN:** 88083681823

You are here: Home » Whose business I can access » View permissions granted to your business » **View authorised credential holders**

View authorised credential holders

« View permissions granted to your business | Authorise new credential holder »

This page lists the credential holders from your business that have permissions assigned to access ATO online services for the appointing business. You can modify those assigned permissions by selecting a credential holder's name.

Appointing business details

ABN:	12345678901
Name:	ABC Shoes

Authorised credential holders

Surname _____ and/or Firstname _____ Search

ABN	Business name
31322827842	SHWETTA, VI TOAN B
73472013860	LAST SUPERANNUATION FUND

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Back
Takes user to 'Whose business I can access' page.

Authorised credential holders
A list of credential holders who already have been assign access to the appointing business.

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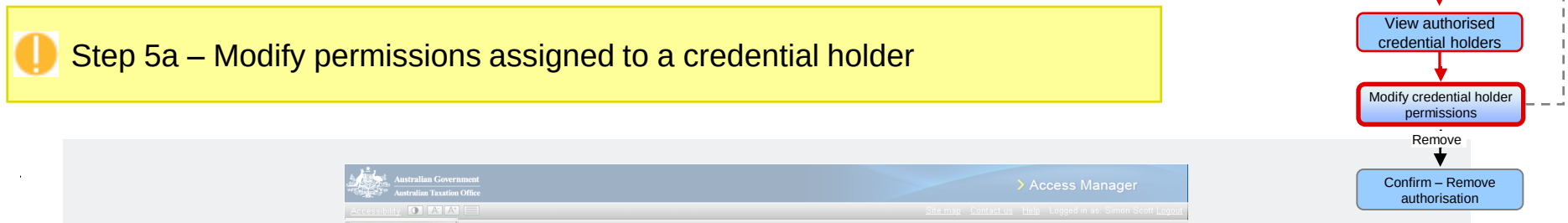
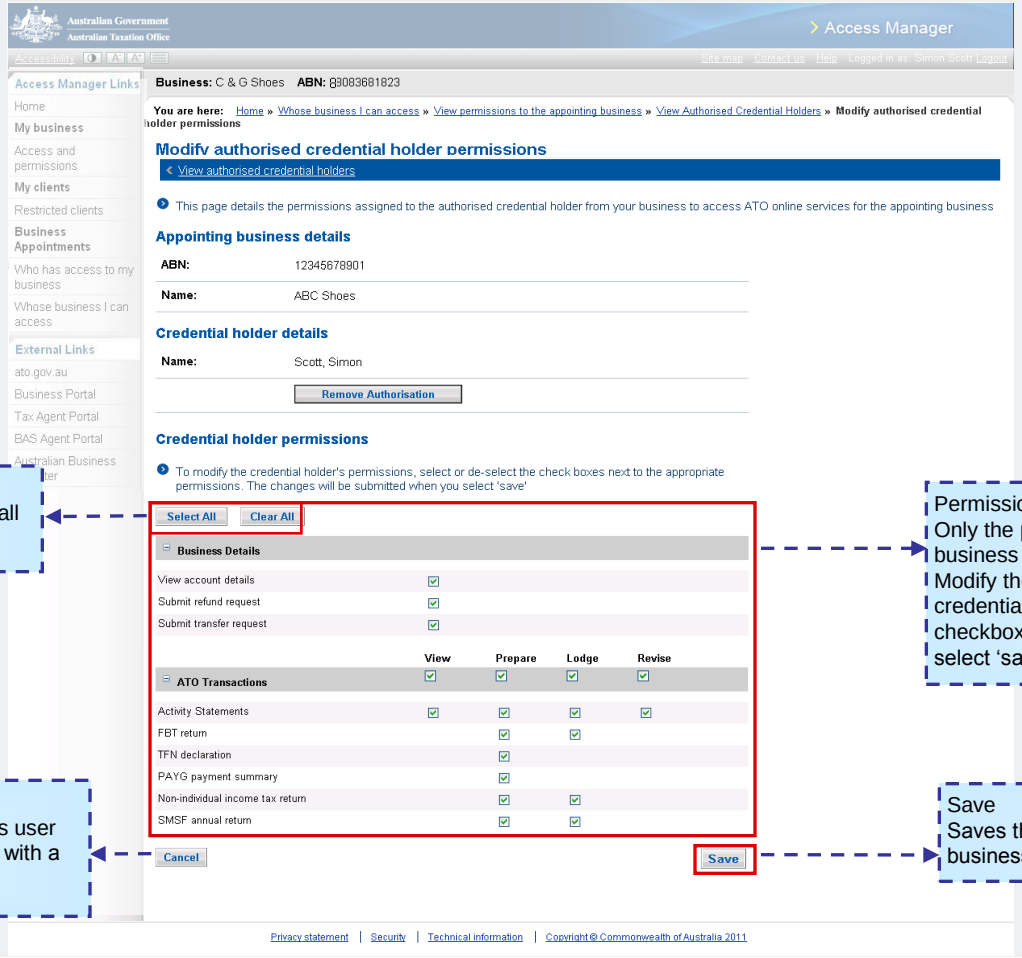
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business



Step 5a – Modify permissions assigned to a credential holder



Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

Permissions
Only the permissions allocated to the appointed business are displayed.
Modify the permissions you have assigned to the credential holder by checking or unchecking the checkboxes. The changes will take effect after you select 'save'

Cancel
Cancels any permissions granted, takes user to 'Whose business I can access' page with a process message.

Save
Saves the permissions, takes user to 'Whose business I can access' with a process message.

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Access Manager

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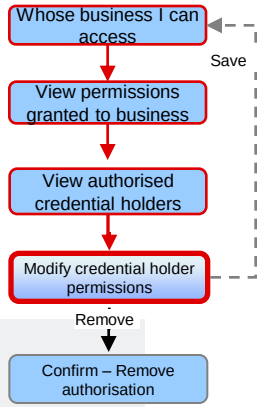
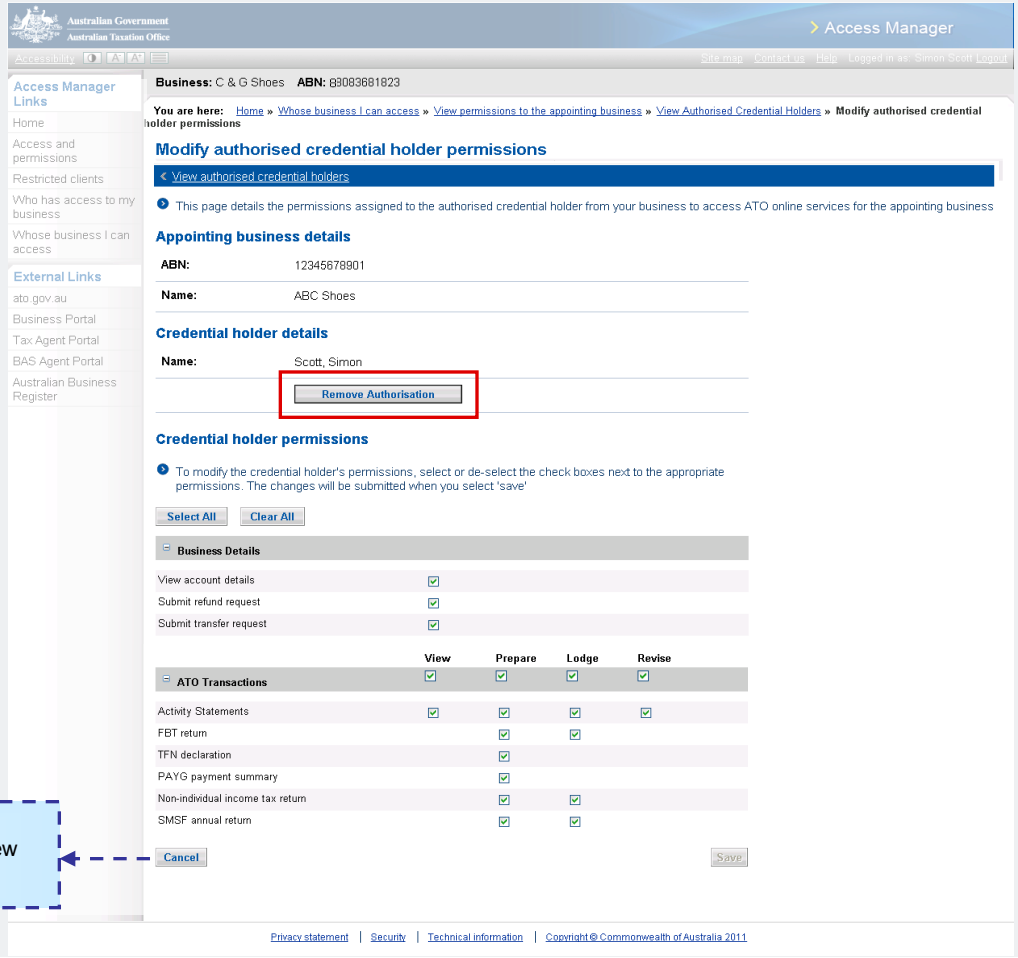
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business



Step 5 – Remove access from a credential holder. Select 'Remove Authorisation'



Cancel
Cancels the action and takes user to 'View authorised credential holders' page.

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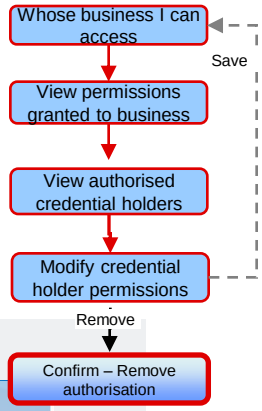
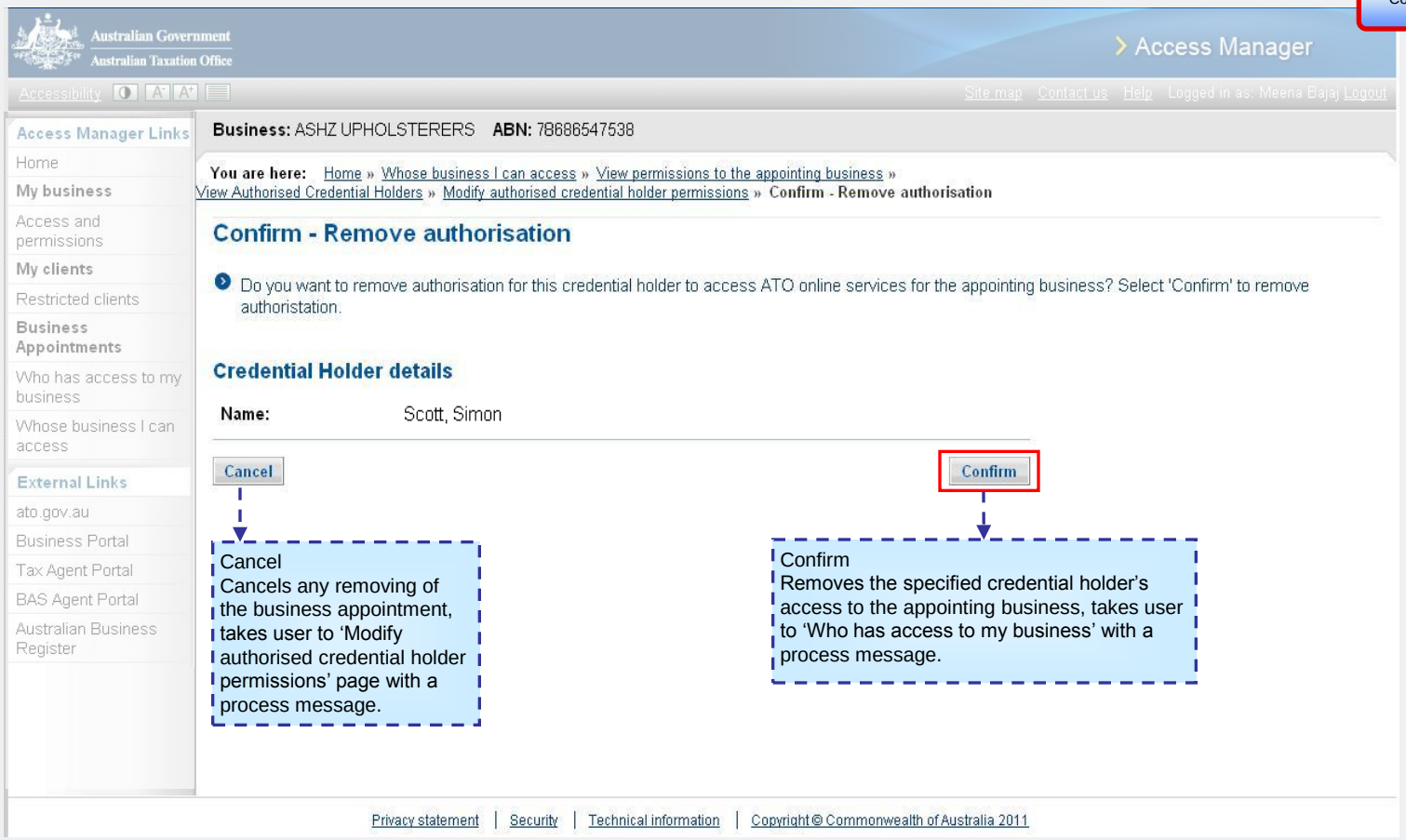
Access Manager

Australian Government
Australian Taxation Office

Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business

Step 6 – Select 'Confirm' to remove access to the appointing business for the specified credential holder





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