

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

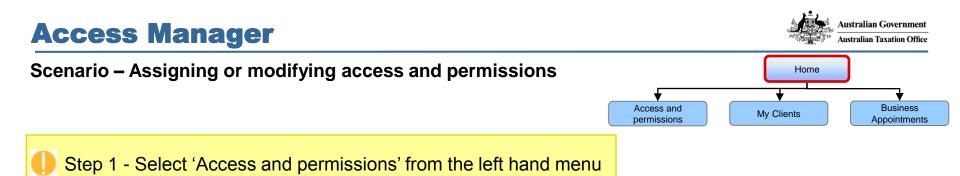
Business Appointments (Appointing Business)

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

Business Appointments (Appointed Business)

<u>Assign access to my credential holders for appointing business</u> <u>Removing modify the permissions I have assigned to my credential holders for an appointing business</u>





| Access Manager Links Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select number · Home You are here: Home * You are here: Home * My Disiness Welcome AMITAPAdmin Request You are here: Home * You are here: Home * My Cleints Velcome AMITAPAdmin Request You are here: Home * <l< th=""><th>Accessibility O A A*</th><th></th><th><u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logou</u></th></l<> | Accessibility O A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logou</u> |
|--|----------------------|---|---|
| My business Velcome AMITAPAdmin Request Access and permissions Updates Restricted clients Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions four bear satisfinement on other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Eg. Web services: View and Lodge Super forms Whose business Canager contains all the core functions of Online Access Manager and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Eg. Web services: View and Lodge Super forms Whose business Canager contains all the core functions of Online Access deform the Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Eg. Web services: View and Lodge Super forms Whose business Canager contains all the core functions of Online Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Eg. Web services: View and Lodge Super forms Subjects Canager Contains all the core functions of Online Access the access deform the Access and permissions Subjects Canager Contains all the core functions are accessed from the Access and permissions Subjects Canager Contains all the core functions Subjects Canager Contains all the core functions are accessed from the Access and permissions < | Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | umber 💌 |
| Access and permissions Welcome AMITAPAdmin Request My clients Updates Restricted clients Coess Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Eg: Web services: View and Lodge Super forms Whose business I can access to rus Ouick Links The following new functional authorisations have been added. Eg: Web services: View and Lodge Super forms External Links • Copy Permissions • Copy Permissions ato. gov.au • Copy Permissions Business Portal • Copy Permissions Tax Agent Portal • Copy Permissions Australian Business • Lother Additional Equiper Super Formation Equi | Home | You are here: Home » | |
| permissions Updates Image: Normal States Image: Normal States< | My business | | |
| Restricted clients Business Appointments Who has access to my business access With as access to my business access Who has access to my business access With as access to my business access With as access to my business With as access to my business Business Portal access Portal BAS Agent Portal Australian Business | | Welcome AM1TAPAdmin Request | |
| Business Appointments Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. The following new functional authorisations have been added. Whose business I can access Ouick Links • Copy Permissions tato gov.au • Copy Permissions Business Portal • Copy Permissions BAS Agent Portal • Copy Termissions BAS Agent Portal • Copy Permissions Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. • Copy Permissions • Copy Permissions • Copy Permissions • Copy Permissions • Access Portal • Copy Permissions • Copy Permissions Bas Agent Portal • Copy Permissions • Copy Permissions Australian Business • Copy Permissions • Copy Permissions | My clients | Updates | Ø What's new |
| Business Appointments Who has access to my business Whose business I can access come additional features such as the copy permissions you have assigned to one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. Whose business I can access Whose business I can access ato.gov.au Business Portal Tax Agent Portal BAS Agent Portal Australian Business | Restricted clients | Access Manager contains all the care functions of Opling Access Manager and | The following new functional authorisations have been added |
| Access and permissions menu or via the quick link on this page. Whose business I can access Cuick Links • Copy Permissions • Copy Permissions Tax Agent Portal BAS Agent Portal Australian Business | | also incorporates some additional features such as the copy permissions | |
| access • Copy Permissions ato.gov.au • Copy Permissions Business Portal • Copy Permissions BAS Agent Portal • Copy Permissions Australian Business • Copy Permissions | | | |
| External Links ato.gov.au Business Portal Tax Agent Portal BAS Agent Portal Australian Business | | Quick Links | |
| Business Portal Tax Agent Portal BAS Agent Portal Australian Business | External Links | <u>Copy Permissions</u> | |
| Tax Agent Portal BAS Agent Portal Australian Business | ato.gov.au | | |
| BAS Agent Portal Australian Business | Business Portal | | |
| Australian Business | Tax Agent Portal | | |
| | BAS Agent Portal | | |
| | | | |

Australian Government

Australian Taxation Office

Access and

Scenario – Assigning or modifying access and permissions

Modify access and permissions Past credential holders history Copy permissions

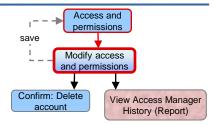
Step 2 - Select the credential holder

| Accessibility 0 A A | | | | | | | |
|--|--|---|--|--|--|---------------------------------------|---|
| Access Manager Links | Business: SHWETTA, VI | TOAN B ABN: | 11322827848 Agen | t number: Select nu | mber 💌 🗕 – | | This display's the details for the business and the option to change the Agent number in focus if the |
| Home | You are here: <u>Home</u> » Ace | cess and permissi | ions | | | | are Agent numbers connected to the ABN. |
| My business | Access and perm | nissions | | | | | |
| Access and permissions | | itial holders histo | ry > <u>Current cred</u> | ential holder access i | report for all age | ent numbers > | Copy permissions > |
| ly clients | Tax practitioner access | > | | | | | Page level menu |
| Restricted clients | The following table con | tains a list of all i | credential holders as | sociated with the soc | ecified Agent n | imher. Select a c | redential holder's name to view available from the current page |
| Business Appointments | access and permission | ns. | | | oniour igent ne | | |
| Who has access to my | Name search | | | Sea | rah | | 1 TIPS |
| usiness | 0 | 12 5 | | | | | LIP5 |
| usiness Vhose business I can ccess | Surname: | and/or F | irst name: | 360 | nen | | You can make a selection |
| Vhose business I can | Surname: | and/or F Credential type | Can manage permissions? | User account status | Last accessed | Last updated | You can make a selection from the Agent number drop down box which is located at |
| /hose business I can ccess x ternal Links | 1 | Credential | Can manage | User account | Last | | You can make a selection from the Agent number drop down box which is located at the top centre of the screen |
| /hose business I can ccess | Name A Request, AM1TAPAdmin Request, | Credential type | Can manage permissions? | User account status | Last accessed | updated | You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated |
| /hose business I can ccess xternal Links ro.gov.au | Name A Request, AM1TAPAdmin Request, AM1TAPDelegateUser | Credential type Administrator Standard | Can manage permissions? Yes Yes | User account status Active Active | Last accessed 14 Oct 2011 14 Oct 2011 | updated 14 Oct 2011 14 Oct 2011 | You can make a selection from the Agent number drop down box which is located at the top centre of the screen |
| /hose business I can ccess x ternal Links o.gov.au usiness Portal | Name A Request, AM1TAPAdmin Request, | Credential type Administrator | Can manage permissions? Yes | User account status Active | Last accessed 14 Oct 2011 | updated 14 Oct 2011 14 Oct 2011 | You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated Credential holders |



Australian Government

Scenario – Assigning or modifying access and permissions



Step 3 – Assign or modify access and permissions

| | Australian Govern | ment | | | | | > Access Ma | nager | |
|---|---|---|------------------------------|--------------------|------------------|------------------------|--|------------------|--|
| | Australian Taxation | Office | | | | Citamon Post | Access Mi | ariagei | |
| | Access Manager Links | Business: SHWETTA, VI TOAN B | BN: 11322827848 | | | Contenting Content up | . Long Logged in as, AWI LAPAdi | | |
| | Access Manager Links Home | You are here: Home » Access and per | | nd permission | 's | | | ٨ | |
| | My business | Modify access and perm | issions | | | | | Access | |
| | Access and permissions | < Access and permissions View | v access manager history | > | | | | | the credential holders access. |
| N | My clients Restricted clients | You can modify a user's access of the second sec | In this page using the radio | o button option | ns below. To s. | ubmit the changes, sel | 'ect 'Save'. | | Access administrator - if 'Yes' the credential |
| B | Business | Credential Holder Access | | | | | | | will have the authority to login to Access |
| A | Appointments Who has access to my | Name: A | Anderson, Bobby | | | | | | ər 🛛 |
| b | business | Access administrator: | ⊙ No ◯ Yes | | | | Disabling an a temporarily rer user's access | | Account status – if 'Disabled' the credential |
| | Whose business I can access | | Active O Disabled | | | | user's access services. Deleting a use | holder y | will not be authorised to log into the portals |
| | External Links | | Delete account | | | | permanently re access to ATC | em | |
| в | Business Portal | Permissions | | | | | services. Select link to v | view which | |
| | Tax Agent Portal BAS Agent Portal | | | | | | permissions a specific applic | are available on | |
| A | BAS Agent Portal Australian Business Register | The business tab displays the per the client tab displays the permiss select or de-select the check boxe you select 'Save'. | sions that can be assigned | d for your client: | its. To modify a | a user's permissions, | | | |
| | | you select 'Save'. Business Client | | | | | 7 | | |
| Select All / Clear All | | Access to all online functionality(in | ncluding future enhancem | rents) for my h | business | | | | |
| You can select all permissions or clear all | | | | , <u>.</u> y | | | | | |
| permissions by using these buttons. | | Select All Clear All | | | | | | | |
| | | My Business Details | | | | | | | |
| | | View business registration details | | | | | | Permiss | sions |
| | | Update business registration details | | | | | | | or modify the credential holders permissions. |
| | | Add / Update financial institution details | | | | | | Onco th | he checkbox aligned with the permission has |
| | | View account details | | | | | | | |
| | | Submit refund request | | | | | | | hecked you must select 'save' for the |
| | | Submit transfer request | | | | | | change | s to take effect |
| | | | View | Prepare | Lodge | Revise | | | |
| | | ATO Transactions | | Prepare | Loage | | | | |
| | | Activity statements | | | | Π | | | |
| | | FBT return | | | | - | - | | |
| | | PBT return PAYG payment summary | | | | | | | |
| | | PAYG payment summary TFN declaration | | | | | | | |
| | | Non-individual income tax return | | | | | | | |
| | | SMSF annual return | | | | | | | |
| | | | | | | | - | | |
| Cancel | | Administration | | | | | | | |
| Cancels any permissions granted, takes user | r | View and action own mail | | | | | | Save | |
| o 'Access and permissions' page with a | | Access other user' mail | | | | | | | the permissions, takes user to 'Access and |
| process message. | | Cancal | | | | | ť | | |
| U U U U U U U U U U U U U U U U U U U | | Cancel | | | | Save | | permiss | sions' homepage with a process message. |
| | | | | | | | | | |





Access and **Restricted clients** permissions



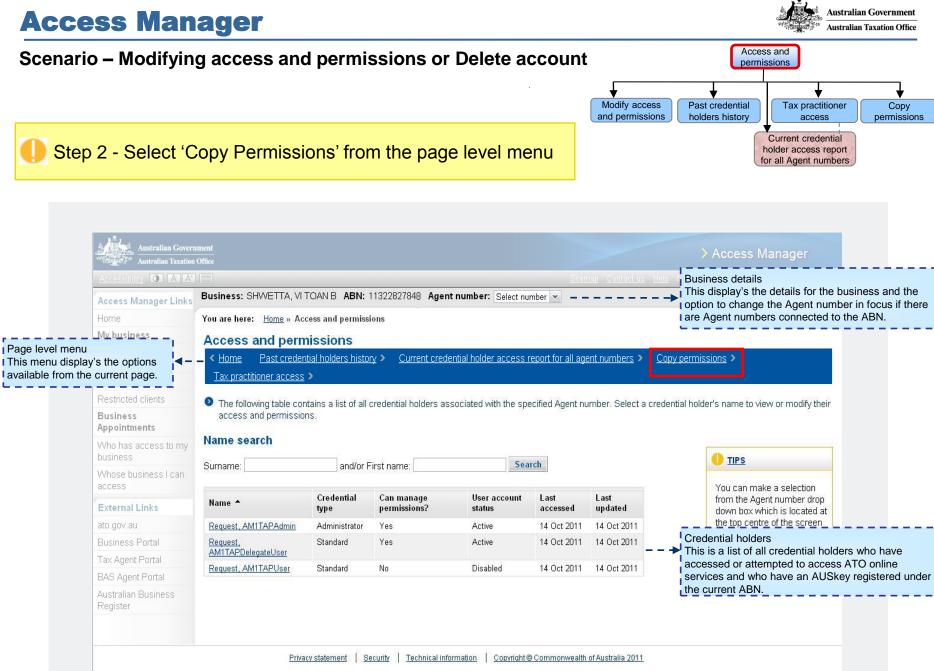
Home

Whose business I can my business access

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

| Accessibility O A A* | | Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logo |
|----------------------------------|---|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | umber 💌 |
| Home | You are here: <u>Home</u> » | |
| My business | | |
| Access and permissions | Welcome AM1TAPAdmin Request | |
| My clients | Updates | Ø What's new |
| Restricted clients | Access Manager and the case functions of Online Access Manager and | The following new functional authorisations have been added. |
| Business Appointments | Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms |
| Who has access to my business | one staff member and assign them to other staff, it can be accessed from the Access and permissions menu or via the quick link on this page. | |
| Whose business I can access | Quick Links | |
| External Links | <u>Copy Permissions</u> | |
| ato.gov.au | | |
| Business Portal | | |
| Tax Agent Portal | | |
| BAS Agent Portal | | |
| Australian Business Register | | |
| | | |





Home

Scenario – Modifying access and permissions or Delete account

Access and permissions Copy permissions

Australian Government

Australian Taxation Office

Home

Step 3

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

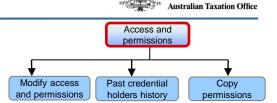
| Accessibility 💽 🗛 🗛 | | | | |
|----------------------------------|---|--|---------------------------|---|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 1132 | 2827848 Agent number: 15301011 💌 | | |
| Home | You are here: Home » Access and permissions » | Copy Permissions | | |
| My business | Copy permissions | | | |
| Access and permissions | < Access and permissions | | | |
| My clients | Select a credential holder from the 'Conv page 10 and the 'Conv | rmissions from' drop down list below to copy t | their permissions | |
| Restricted clients | You can also type in all or part of a credenti | | 2 | |
| Business Appointments | Select user | | | |
| Who has access to my business | Copy permissions from Request, AM1TAPUser | Copy permissions to | | If you copy permissions to a |
| Whose business I can access | | 🗹 Hen, Joe | | credential holder, any permissions already assigned to them will be |
| External Links | ·····¥······ | 🗹 Lee, David | Credentia | ' ` |
| ato.gov.au | Credential holder | 🔲 Normal, Katy | | current credential holders |
| Business Portal | Drop down list of all current | Thor, Maeve | | e credential holder selected in |
| Tax Agent Portal | | | | permissions from' drop down |
| BAS Agent Portal | | | | must select one and may many as you like. |
| Australian Business Register | | | | |
| | | | | |
| | Cancel | Save | ····· | ! |
| | | Sav | es the permissions, takes | s user to 'Access and |
| | | perr | missions' homepage with | a process message. |

Scenario – Manage Access

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

| Accessibility O A A* | | Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout |
|---------------------------------|--|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | imber 💌 |
| Home | You are here: Home » | |
| My business | | |
| Access and permissions | Welcome AM1TAPAdmin Request | |
| My clients | Updates | What's new |
| Restricted clients | Access Manager contains all the core functions of Online Access Manager and | The following new functional authorisations have been added. |
| Business Appointments | also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms |
| Who has access to my business | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | |
| Whose business I can access | Quick Links | |
| External Links | <u>Copy Permissions</u> | |
| ato.gov.au | | |
| Business Portal | | |
| Tax Agent Portal | | |
| BAS Agent Portal | | |
| Australian Business Register | | |
| Register | | |

Scenario – Manage Access



Australian Government

Home

Step 2 - Select the credential holder

| Accessibility O A At | | | | | | | | |
|---|---|--|---|---|--|---|---|--|
| Access Manager Links | Business: SHWETTA, VI | TOAN B ABN: 1 | 11322827848 Agen | t number: Select nu | mber 💌 🗕 – | | This display's the details for the busi option to change the Agent number i | ness and the in focus if the |
| Home | You are here: <u>Home</u> » Acc | cess and permissi | ions | | | | are Agent numbers connected to the | |
| My business | Access and perm | nissions | | | | | | |
| Access and permissions | < Home Past creden | ntial holders histor | ry > <u>Current crede</u> | ential holder access r | eport for all age | ent numbers > <u>C</u> | opy permissions > | |
| My clients | Tax practitioner access | > | | | | | Page level menu | |
| Restricted clients | | | | | | | | |
| Reserved energy | The following table con | tains a list of all u | credential holders as | sociated with the spe | ecified Agent nu | umber. Select a cred | dential holder's name to view This menu display | |
| Business Appointments | The following table con access and permission | | credential holders as | sociated with the spe | cified Agent nu | umber. Select a crec | dential holder's name to view This menu display available from the | |
| Business | access and permission | ns. | | | | umber. Select a cred | | |
| Business Appointments Who has access to my | access and permission | ns. | credential holders as First name: | sociated with the spe | | umber. Select a crec | available from the | |
| Business Appointments Who has access to my business Whose business I can access | access and permission | ns. | | | | Last updated | You can make a selection from the Agent number drop down box which is located at | |
| Business Appointments Who has access to my business Whose business I can access External Links | access and permission Name search Surname: | ns. and/or F Credential | First name: | Sea User account | rch | Last | You can make a selection from the Agent number drop down box which is located at the top centre of the screen | |
| Business Appointments Who has access to my business Whose business I can access External Links ato.gov.au | access and permission Name search Surname: Name Request, AM1TAPAdmin Request, | ns. and/or F Credential type | First name: Can manage permissions? | Sea User account status | rch Last accessed | Last updated | You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated | |
| Business Appointments Who has access to my business Whose business I can | access and permission Name search Surname: Name Request. AM1TAPAdmin Request. AM1TAPDelegateUser | ns. and/or F Credential type Administrator Standard | First name: Can manage permissions? Yes Yes | Sea User account status Active Active | Last accessed 14 Oct 2011 14 Oct 2011 | Last updated 14 Oct 2011 14 Oct 2011 | You can make a selection from the Agent number drop down box which is located at the top centre of the screen | e current page |
| Business Appointments Who has access to my business Whose business I can access External Links ato.gov.au Business Portal | access and permission Name search Surname: Name Request, AM1TAPAdmin Request, | ns. and/or F Credential type Administrator | First name: Can manage permissions? Yes | Sea User account status Active | Last accessed 14 Oct 2011 14 Oct 2011 | Last updated 14 Oct 2011 | You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated | e current page who have O online |

Scenario – Manage Access – Access administrator

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

| Australian Govern | | | | > Access Manager | | |
|---|---------------------------------|---|--|--|--|--|
| Accessibility O A A ⁺ | | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> L(| ogged in as: AM1TAPAdmin Request Logo | | |
| Access Manager Links | Business: SHWETTA, VI TO | AN B ABN: 11322827848 | | | | |
| Home | You are here: Home » Acces | s and permissions » Modify access and pe | rmissions | | | |
| My business | Modify access and | permissions | | | | |
| Access and permissions | < <u>Access and permissions</u> | View access manager history > | | | | |
| My clients | You can modify a user's : | access on this page using the radio butto | n options below. To submit the changes, select 'Save' | | | |
| Restricted clients | Credential Holder Ac | | 12-12-22-22-22-22-22-22-22-22-22-22-22-2 | 0 | | |
| Business Appointments | | | Access Administrator A Standard user can be granted | U TIPS | | |
| Who has access to my pusiness | Name: Access administrator: | Request, AM1TAPDelegateUser | access to AM by selecting the 'yes' | Disabling an account temporarily removes a user's access to ATO online | | |
| Vhose business I can ccess | Account status: | Active O Disabled | other Standard users. This access | | | |
| External Links | | Delete account | can be removed by selecting the 'No' radio button. | Deleting a user's account permanently removes their | | |
| to.gov.au | | | The account is updated once the | access to ATO online services. | | |
| usiness Portal | | | changes have been saved. | Select link to view which | | |
| ax Agent Portal | Permissions | | | permissions are available on | | |
| AS Agent Portal | | | o a credential holder for your business and | specific <u>applications</u> . | | |
| ustralian Business legister | | | ur clients. To modify a user's permissions, sions. The changes will be submitted when | | | |
| | Business Client | | | | | |
| | Access to all online funct | onality(including future enhancements) f | or my clients | | | |
| | Select All Clear All | | | | | |

Confirm Access and permissions save Modify access and permissions

Confirm: Delete

account

I.

View Access Manager

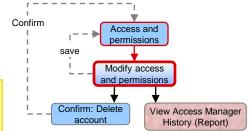
History (Report)

Home

Scenario – Manage Access – Disable Account

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

| Australian Taxation | | | Access Manager | | | |
|----------------------------------|---|--|--|--|--|--|
| Accessibility O A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logg | ed in as: AM1TAPAdmin Request <u>Logo</u> | | | |
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 | | | | | |
| Home | You are here: <u>Home</u> » <u>Access and permissions</u> » Modify access and | permissions | | | | |
| My business | Modify access and permissions | | | | | |
| Access and permissions | < <u>Access and permissions</u> <u>View access manager history</u> > | n. | | | | |
| My clients | You can modify a user's access on this page using the radio be | utton options below. To submit the changes, select 'Save'. | | | | |
| Restricted clients | | Account status | 1 | | | |
| Business Appointments | Credential Holder Access Name: Request, AM1TAPDelegateUser | A credential holder's account may be disabled by selecting the 'Disabled' | () <u>TIPS</u> | | | |
| Who has access to my business | Access administrator: O No 👁 Yes | radio button. If the account is disabled, the credential holder will not | Disabling an account temporarily removes a user's access to ATO online | | | |
| Whose business I can access | Account status: | → be able to access AM or any ATO online services such as Portals. A | services. Deleting a user's account | | | |
| External Links | Delete account | disabled account can be reactivated | permanently removes their | | | |
| ato.gov.au | | by selecting the 'Active' radio button. | access to ATO online services. | | | |
| Business Portal | | I changes have been saved. | Select link to view which | | | |
| Tax Agent Portal | Permissions | · | permissions are available on | | | |
| BAS Agent Portal | The business tab displays the permissions that can be assigned to a credential holder for your business and | | | | | |
| Australian Business Register | the client tab displays the permissions that can be assigned for select or de-select the check boxes next to the appropriate per you select 'Save'. | r your clients. To modify a user's permissions, | | | | |
| | Business Client | | | | | |
| | Access to all online functionality(including future enhancements | s) for my clients | | | | |
| | | | | | | |

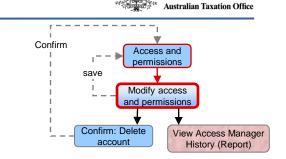




Home

Scenario – Manage Access - Delete account

Step 3c – Select 'Delete account'



Australian Government

| Australian Gover | | | Access Manager | | |
|----------------------------------|---|--|---|--|--|
| Accessibility 0 A A | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logg | ed in as: AM1TAPAdmin Request <u>Logo</u> | | |
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 | | | | |
| Home | You are here: Home » Access and permissions » Modify access and pe | rmissions | | | |
| My business | Modify access and permissions | | | | |
| Access and permissions | < <u>Access and permissions</u> <u>View access manager history</u> > | | | | |
| My clients | You can modify a user's access on this page using the radio butto | n options below. To submit the changes, select 'Save'. | | | |
| Restricted clients | | | | | |
| Business Appointments | Credential Holder Access Name: Request, AM1TAPDelegateUser | Delete account A credential holder's account may be | 0 <u>TIPS</u> | | |
| Who has access to my business | Access administrator: ONo () Yes | deleted from AM by selecting the Disabling an account temporarily removes | | | |
| Whose business I can access | Account status: | is deleted, the credential holder will not be able to access AM or any ATO | Deleting a user's account | | |
| External Links | Delete account | online services such as Portals. This I action does not cancel their AUSkey. I | permanently removes their | | |
| ato.gov.au | · · · · · · · · · · · · · · · · · · · | A deleted account can not be | access to ATO online services. | | |
| Business Portal | | reactivated in AM. | Select link to view which | | |
| Tax Agent Portal | Permissions | | permissions are available on | | |
| BAS Agent Portal | The business tab displays the permissions that can be assigned t | o a credential holder for your business and | specific <u>applications</u> . | | |
| Australian Business Register | the client tab displays the permissions that can be assigned for yo select or de-select the check boxes next to the appropriate permis you select 'Save'. | | | | |
| | Business Client | | | | |
| | Access to all online functionality(including future enhancements) for | or my clients | | | |
| | | | | | |

<u>Home</u>

Australian Government

Confirm

Scenario – Manage Access - Delete account

Step 4 – Select 'Confirm' to delete the account

| Accessibility 0 A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logo</u> |
|----------------------------------|---|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 1132: | |
| Home | You are here: Home » Access and permissions » | Modify access and permissions » Delete user account |
| My business | Confirm - Delete account | |
| Access and permissions | < Access and permissions | |
| My clients | | this credential holder will not be able to access ATO online services. |
| Restricted clients | Select 'Confirm' to delete the credential hold | er's account. |
| Business Appointments | Name: Request, AM1TAPDe | legateUser |
| Who has access to my business | Cancel | Confirm |
| Whose business I can access | i • | |
| | ion, takes user to 'Modify ssions' page with a process | Confirm Saves the deletion, takes user to 'Access and permissions' homepage with a process message. |
| BAS Agent Portal | | |
| Australian Business Register | | |
| regiocol | | |



Scenario – Add a restricted client

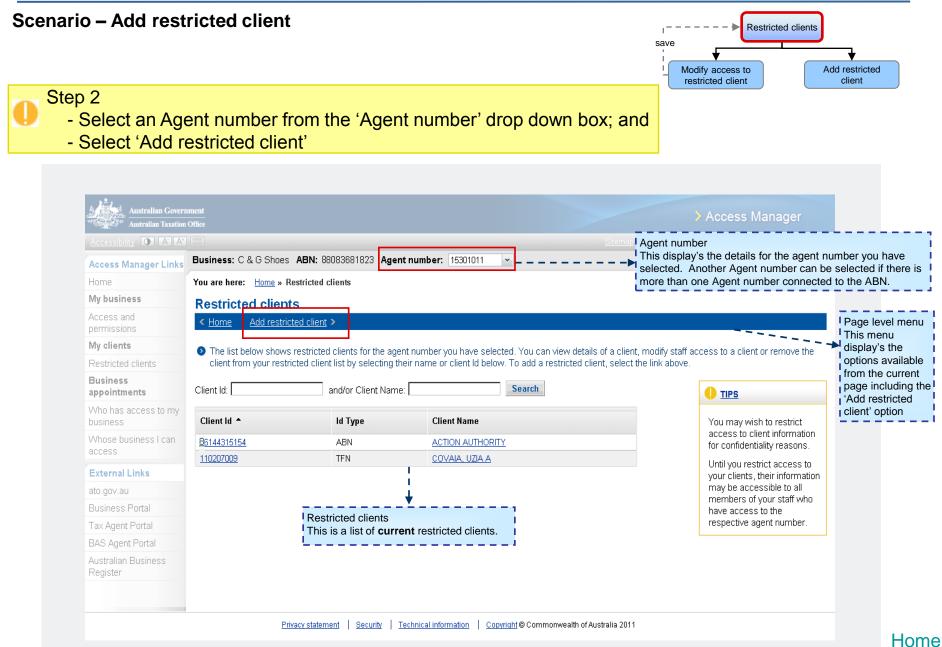




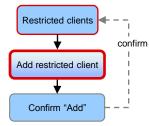
Step 1 - Select 'Restricted clients' from the left hand menu

| Accessibility O A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logou</u> |
|----------------------------------|---|---|
| Access Manager Links | Business: MON VI TOAN BENITZ SHWETTA ABN: 11322827848 Agent number | r: 15301011 🔹 |
| Home | You are here: Home » | |
| My business | | |
| Access and permissions | Welcome AM1TAPAdmin Request | |
| My clients | Updates | What's new |
| Restricted clients | Access Manager partning all the care functions of Online Access Manager and | The following new functional authorisations have been added. |
| Business Appointments | Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms |
| Who has access to my business | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | |
| Whose business I can access | Quick Links | |
| External Links | <u>Copy Permissions</u> | |
| ato.gov.au | | |
| - Business Portal | | |
| Tax Agent Portal | | |
| BAS Agent Portal | | |
| Australian Business Register | | |





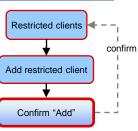
Scenario – Add restricted client



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

| Access Manager | Links Dusiness: MON VI | TUAN BENITZ SH | WETTA ABN: 11322827848 Agent number: 15301011 🥥 | |
|--------------------------------|----------------------------|-----------------------|--|--|
| Home | You are here: Hom | e » Restricted client | <u>s</u> » Add restricted client | |
| My business | Add restricte | d client | | |
| Access and permissions | < <u>Restricted client</u> | <u>ts</u> | | |
| My clients | To add a client f | to your restricted cl | lient list, select their client ld or name from the list below. You can filter the | list of clients by entering the client's ld or name |
| Restricted clients | into the search | fields. | | |
| Business Appointments | Client Id: | and/ | or Client Name: Search | |
| Who has access business | to my Client Id | ld Type | Client Name 🔺 | Only unrestricted clients |
| Whose business I ca | can <u>85075056058</u> | ABN | A & A ASSOCIATES PTY LTD RAED | associated with the selected Agent number are displayed |
| access | <u>68083112056</u> | ABN | A & A ASSOCIATES PTY, LIMITED RAED | on this screen. You can make a different selection |
| External Links | 32000070278 | ABN | A & A CONSTRUCTIONS PTY LTD | from the Agent number drop |
| ato.gov.au | <u>81080852535</u> | ABN | <u>A & A PTY LTD</u> | down box to display clients associated with that Agent |
| Business Portal | 42028625 | TFN | A & A PTY, LIMITED | number. |
| Tax Agent Portal | 78082496697 | ABN | A & H AGENCIES PTY LTD | |
| BAS Agent Portal | <u>32876841391</u> | ABN | A & H MANAGEMENT SERVS PTY LTD | |
| Australian Busine: Register | ^{SS} 76089953948 | ABN | A & H P SERVICES PTY LIMITED | |
| | 52857916257 | ABN | A & I CONSTRUCTIONS PTY LTD | Client list |
| | 77000058644 | ABN | A & S CONSTRUCTIONS PTY LTD | I are associated with the selected Agent |
| | Displaying 1 to 10 of | f 103 records found | < Previous 1 2 3 4 5 6 7 8 9 10 Next > | I number are displayed. |
| addition of a | | | | |

Scenario – Add restricted client



Step 3 - Select 'Confirm'

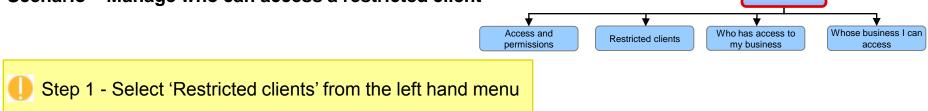
| Accessibility O A At | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logout</u> |
|--|---|---|
| Access Manager Links | Business: MON VI TOAN BENITZ SHWETTA | ABN: 11322827848 Agent number: 15301011 Ø |
| Home | You are here: Home » Restricted Clients » Add R | estricted Client » Confirm - Add restricted client |
| My business | Confirm - Add restricted client | |
| Access and permissions | < <u>Restricted clients</u> | |
| My clients | Adding a client to the restricted client list will | restrict your staff access to this client. To complete this process, please select the "Confirm" button. |
| Restricted clients | - | · |
| Business Appointments | Client details ABN: 77000054444 | |
| Who has access to my business | Name: A & S CONSTRUCTI | ONS PTY LTD |
| Whose business I can access | Cancel | Confirm |
| External Links ato.gov.au | l IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | |
| Busine Cancel Cancels the r Restricted cli BAS A: process mess Australian Business Register | estriction, takes user to ents' page with a sage. | Confirm Confirms that the client will be restricted, takes user to 'Restricted clients' page with a process message. The newly restricted client will appear in the restricted client list. |

Australian Government

Home

Home

Scenario – Manage who can access a restricted client



| Accessibility O A A* | | Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logou |
|----------------------------------|--|---|
| Access Manager Links | Business: MON VI TOAN BENITZ SHWETTA ABN: 11322827848 Agent number | r: 15301011 🗸 |
| Home | You are here: Home » | |
| My business | | |
| Access and permissions | Welcome AM1TAPAdmin Request | |
| My clients | Updates | What's new |
| Restricted clients | Access Manager contains all the core functions of Online Access Manager and | The following new functional authorisations have been added. |
| Business Appointments | also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms |
| Who has access to my business | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | |
| Whose business I can access | Quick Links | |
| External Links | <u>Copy Permissions</u> | |
| ato.gov.au | | |
| Business Portal | | |
| Tax Agent Portal | | |
| BAS Agent Portal | | |
| Australian Business Register | | |
| 5 | | |

Scenario – Manage who can access a restricted client

Modify access to restricted client

save



Australian Government

Add restricted

client

Step 2

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

| Accessibility O A A* | | | | <u>Sitemap</u> <u>Contac</u> | t us _Help _Looped in as, Simon Scott Loope | |
|----------------------------------|-----------------------------|-------------------------|--|------------------------------|--|-----------------------------------|
| Access Manager Links | Business: C & G Shoe | es ABN: 88083681823 Age | nt number: 15301011 💌 🛛 | | isiness details is display's the details for the busi | ness and the ontio |
| Home | You are here: <u>Home</u> » | Restricted clients | | to | change the Agent number in focu | |
| My business | Restricted clier | nts | | nu | mbers connected to the ABN. | |
| Access and | | ricted client > | | | | |
| permissions My clients | | | | | | Page level men This menu displ |
| Restricted clients | | | ent number you have selected. You car their name or client ld below. To add a r | | | the options |
| Business appointments | Client Id: | and/or Client Nam | | | | available from the current page. |
| Who has access to my business | Client Id 🔺 | ld Type | Client Name | | You may wish to restrict | |
| Whose business I can | <u>36144315454</u> | ABN | COLERIL TOD | | access to client information for confidentiality reasons. | |
| access | <u>110207009</u> | TFN | <u>COVAIA, UZIA A</u> | | Until you restrict access to | |
| External Links | | | | | your clients, their information | |
| ato.gov.au | | | | , | may be accessible to all members of your staff who | |
| Business Portal | | | Restricted clients | | have access to the | |
| Tax Agent Portal | | | This is a list of current | restricted clients. | respective agent number. | |
| BAS Agent Portal | | | | | | |
| Australian Business Register | | | | | | |
| | | | | | | |
| | | | | | | |

Australian Government Australian Taxation Office

Restricted clients

Modify access to

restricted client

save

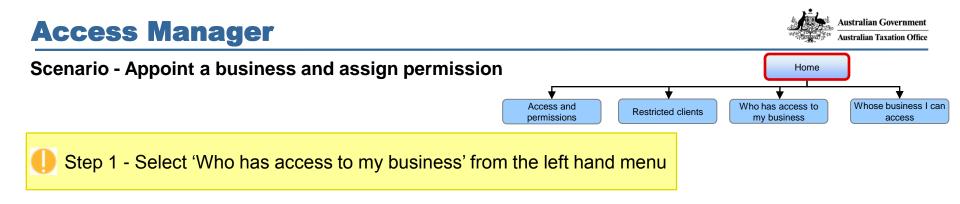
-

Scenario – Manage who can access a restricted client

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

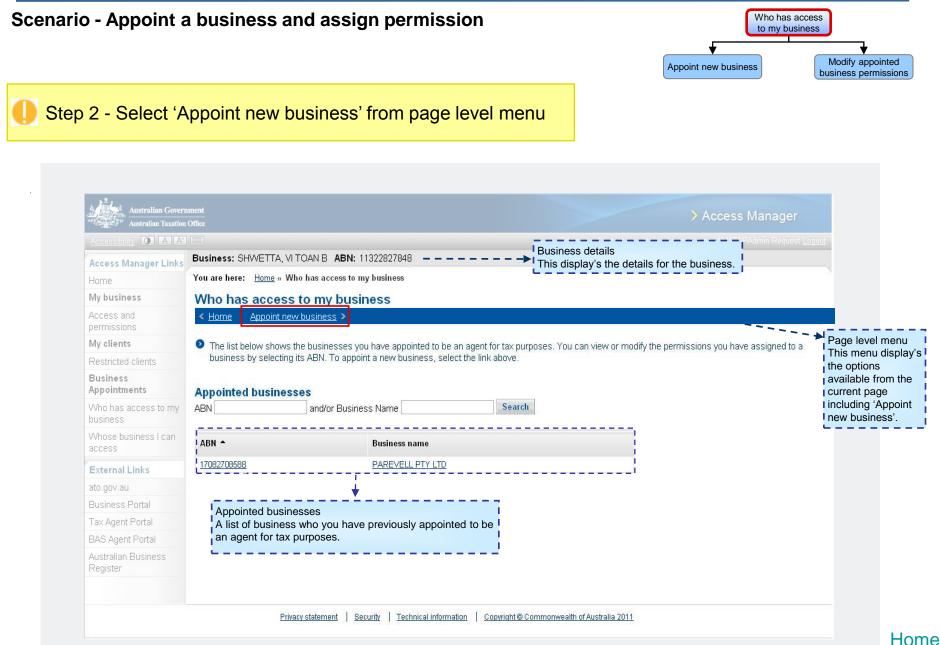
| | Australian Taxation | | > Access Manager | |
|--|--|--|---|--|
| | Accessibility O A [*] A [*] | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: 16301011 | iged in as: AM1TAPAdmin Request <u>Logout</u> | |
| | Access Manager Links | | | |
| | Home | You are here: Home » Restricted clients » Modify Access to Restricted Client | | |
| | Mybusiness | Modify access to restricted client | | |
| | Access and permissions | < <u>Restricted clients</u> | | |
| | My clients | You can modify a credential holder's access to this restricted client using the check boxes in the credential | | |
| | Restricted clients | holder list below. | | |
| | Business Appointments | Restricted client details | Greyed out credential holders shown in the list have | |
| | Who has access to my business | ABN: 19001777733 | access to all restricted clients because they have the 'Access to all restricted | |
| | Whose business I can access | Name: COLERIL TOD | clients' permission selected. To remove their access, you | |
| | External Links | Remove Restriction | must first deselect the | |
| | ato.gov.au | | 'Access to all restricted clients' permission for the | |
| | Business Portal | | relevant credential holder on | |
| Tax Agent Portal | | Credential holders | the 'Modify access and permissions' screen. | |
| ential hold | | To allow a credential holder to have access to this restricted client, select the check box next to their name. To remove a credential holder's access to this restricted client, uncheck the box next to their name. When you select save, the changes you have made will be in effect. | | |
| ers who ha it number. ers that are | all credential as access to the All the credential e ticked have estricted client. | Request, AM1TAPAdmin ■ Scott, Simon | ave | |
| | | Cancel | aves the changes made to the ac or credential holders and takes us Restricted clients' with a process nessage. | |

Home

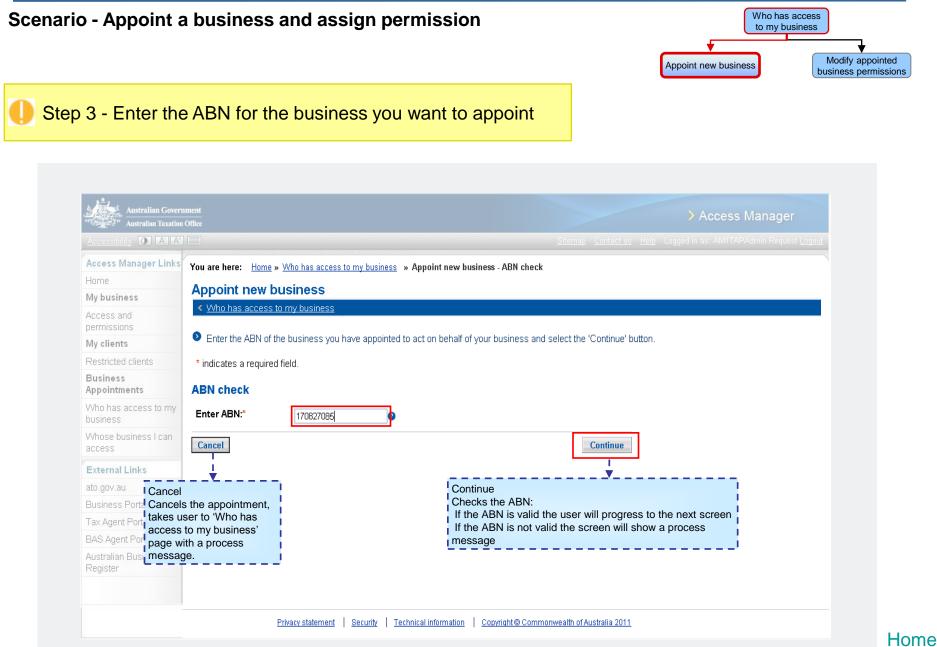


| Accessibility 0 A At | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logo</u> | | |
|----------------------------------|--|--|--|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | mber 💌 | | |
| Home | You are here: Home » | | | |
| My business | | | | |
| Access and permissions | Welcome AM1TAPAdmin Request | | | |
| My clients | Updates | What's new | | |
| Restricted clients | Access Manager contains all the core functions of Online Access Manager and | The following new functional authorisations have been added. | | |
| Business Appointments | also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms | | |
| Who has access to my ousiness | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | | | |
| Whose business I can access | Quick Links | | | |
| External Links | <u>Copy Permissions</u> | | | |
| ato.gov.au | | | | |
| Business Portal | | | | |
| Fax Agent Portal | | | | |
| BAS Agent Portal | | | | |
| Australian Business Register | | | | |

Australian Government
Australian Taxation Office



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Step 4 – Assign permissions

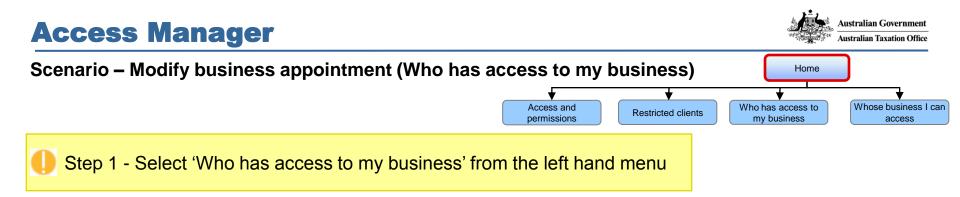
Scenario - Appoint a business and assign permission

Business: ABC Shoes ABN: 12345678901 Access Manager Links You are here: Home » Who has access to my business » Appoint new business - ABN check » Appoint new business My business Appoint new business - assign permissions To assign permissions to the business you have appointed, select or de-select the check boxes next to the appropriate permissions. When you select save, My clients the changes you have made will be in effect Business **Business details** Appointments ABN 88083681823 Name: C & G Shoes access **Remove Business Appointment** External Links ato.gov.au **Business permissions** Select the permissions you want the above business to have access to when acting on your behalf and select the "Save" to button. Select All / Clear All Access to all online functionality(including future enhancements) for my business You can select all permissions or clear all Select All Clear All permissions by using these buttons. Permissions Business Details Check the checkbox aligned with the permission you View business registration details want to assign to the business you have appointed Update business registration details as an agent for your tax affairs. You must select Add / Update financial institution details View account details **V** I 'save' for the changes to take effect Submit refund request **V** Submit transfer request **V** View Prepare Lodge Revis ATO Transactions Activity Statements **V** . FBT return **V V** TFN declaration Cancel PAYG payment summary **V** Cancels any permissions granted, takes user Non-individual income tax return **V V** Save to 'Who has access to my business' page with SMSF annual return Saves the permissions, takes user to 'Who has a process message. Cancel Save access to my business' with a process message





Home



| Accessibility O A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logout</u> |
|----------------------------------|--|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | mber 💌 |
| Home | You are here: Home » | |
| My business | | |
| Access and permissions | Welcome AM1TAPAdmin Request | |
| My clients | Updates | What's new |
| Restricted clients | Access Manager contains all the core functions of Online Access Manager and | The following new functional authorisations have been added. |
| Business Appointments | also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms |
| Who has access to my business | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | |
| Whose business I can access | Quick Links | |
| External Links | <u>Copy Permissions</u> | |
| ato.gov.au | | |
| Business Portal | | |
| Tax Agent Portal | | |
| BAS Agent Portal | | |
| Australian Business Register | | |
| | | |

Australian Government **Access Manager** Australian Taxation Office Scenario - Modify business appointment (Who has access to my business) Who has access to my business Modify appointed Appoint new business business permissions Step 2 - Select the appointed business ccessibility 🚺 🗛 🗛 Business details Business: SHWETTA, VITOAN B ABN: 11322827848 Access Manager Links This display's the details for the business. You are here: Home » Who has access to my business Home My business Who has access to my business Access and < Home Appoint new business > permissions The list below shows the businesses you have appointed to be an agent for tax purposes. You can view or modify the permissions you have assigned to a Page level menu hubinesses hubinesses have businesses you have assigned to a Page level menu My clients This menu display's business by selecting its ABN. To appoint a new business, select the link above. the options Business available from the Appointments **Appointed businesses** current page. Search ABN and/or Business Name Who has access to my Whose business I can <u>ABN</u> **Business name** access 11322827848 SHWETTA, VI TOAN B External Links LAST SUPERANNUATION FUND 33472013868 ato.gov.au **Business Portal** Tax Agent Portal Appointed businesses BAS Agent Portal A list of business who you have previously appointed to be an agent for tax purposes. Australian Business Privacy statement Security Technical information Copyright © Commonwealth of Australia 2011 Home

Australian Government

Who has access to my business

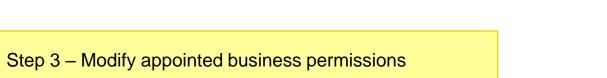
Modify appointed business permissions

Confirm - Remove

business appointment

Confirm

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



| | Australian Taxation | | | _ | _ | Site | <u>map Contact us Help</u> Logged in as: Vijay | / Mallya Logout | | |
|--|----------------------------------|--|--------------------------------------|-----------------|-----------------|---------------------|--|--|--|--|
| | Access Manager Links | Business: ABC Shoes ABN: 1 | 2345678901 | | | | | | | |
| | Home | You are here: Home » Who has access to my business » Modify appointed business permissions | | | | | | | | |
| | Mybusiness | Modify appointed business permissions | | | | | | | | |
| | Access and permissions | < Who has access to my busi | ess | | | | | | | |
| | My clients Restricted clients | To modify the permissions a submitted when you select 's | signed to the appointed bus ave'. | iness, select o | or de-select th | check boxes next | to the appropriate permissions. The char | ges will be | | |
| | Business Appointments | Business details | | | | | | | | |
| | Who has access to my business | ABN: 88083 | 581823 | | | | | | | |
| | Whose business I can | Name: C&G | Shoes | | | | | | | |
| | access | | Remove Business Appointm | ient | | | | | | |
| | External Links ato.gov.au | | | | | | | | | |
| | Business Portal | Business permissions | | | | | | | | |
| | Tax Agent Portal | Select the permissions you w the "Save" to button. | ant the above business to h | ave access to | when acting o | n your behalf and s | elect | | | |
| ect All / Clear All | BAS Agent Portal | | | | | | | | | |
| | Australian Business | Access to all online functional | ty(including future enhancer | nents) for my l | business | | | | | |
| can select all permissions or clear all | Register | Select All Clear All | | | | | | | | |
| nissions by using these buttons. | 1 | | | | | | - 6 | Permissions | | |
| | 4 | Business Details | | | | | | Modify the appointed business permissions that | | |
| | | View business registration details | | | | | | | | |
| | | Update business registration details | | | | | | you have previously assigned to the business | | |
| | | Add / Update financial institution det | | | | | | you appointed as agent for your tax affairs. | | |
| | | View account details | | | | | | Once a checkbox aligned with a permission has | | |
| | | Submit refund request | | | | | | been checked or unchecked, you must select | | |
| | | Submit transfer request | | | | | | save' for the changes to take effect | | |
| | | | View | Prepare | Lodge | Revise | | | | |
| | | ATO Transactions | | V | | | | | | |
| | | Activity Statements | V | | V | | | | | |
| | | FBT return | | V | V | | | | | |
| | | TFN declaration | | | | | | | | |
| | | PAYG payment summary | | | | | | | | |
| | | Non-individual income tax return | | | V | | | | | |
| ncel | | SMSF annual return | | V | V | | | Saves the permissions, takes user to 'Who has | | |
| | 26 | | | | | | | | | |
| ncel ncels any changes you have made, take er to 'Who has access to my business' p | | Cancel | | | | | Save | access to my business' with a process message | | |

Scenario – Modify or Remove business appointment (Who has access to my business) Access and permissions Restricted clients Who has access to my business Whose business I can access

| Accessibility O A A* | | <u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logou</u> | | |
|----------------------------------|--|---|--|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu | imber 💌 | | |
| Home | You are here: Home » | | | |
| My business | | | | |
| Access and permissions | Welcome AM1TAPAdmin Request | | | |
| My clients | Updates | What's new | | |
| Restricted clients | Access Manager contains all the core functions of Online Access Manager and | The following new functional authorisations have been added. | | |
| Business Appointments | also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to | Eg: Web services: View and Lodge Super forms | | |
| Who has access to my business | one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page. | | | |
| Whose business I can access | Quick Links | | | |
| External Links | <u>Copy Permissions</u> | | | |
| ato.gov.au | | | | |
| Business Portal | | | | |
| Tax Agent Portal | | | | |
| BAS Agent Portal | | | | |
| Australian Business Register | | | | |
| | | | | |

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Australian Taxation Office

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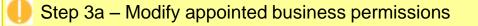
Scenario – Modify or Remove business appointment (Who has access to my business)

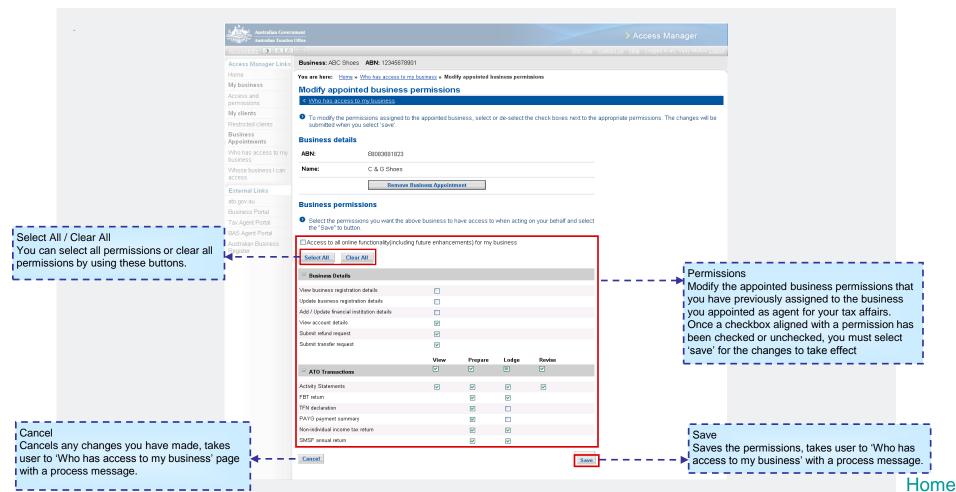


Step 2 - Select the appointed business

| Accessibility 0 A A* | Admin Request Logout |
|---------------------------------|--|
| Access Manager Links | Business: SHWETTA, VI TOAN B ABN: 11322827848 |
| Home | You are here: Home who has access to my business |
| My business | Who has access to my business |
| Access and permissions | < Home Appoint new business > Page level menu |
| My clients | • The list below shows the businesses you have appointed to be an agent for tax purposes. You can view or modify the permissions you have as available from the current page |
| Restricted clients | business by selecting its ABN. To appoint a new business, select the link above. |
| Business Appointments | Appointed businesses |
| Who has access to my business | ABN and/or Business Name Search |
| Whose business I can access | ABN Business name |
| External Links | 11322827848 SHWETTA, VI TOAN B |
| ato.gov.au | 33472013868 LAST SUPERANNUATION FUND |
| Business Portal | |
| Fax Agent Portal | Appointed businesses |
| BAS Agent Portal | A list of business who you have previously appointed to be |
| Australian Business Register | an agent for tax purposes. |
| | |

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







Who has access

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

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

| Australian Govern | iment Office | | | | | | > Access Manager | | |
|--------------------------------|---|--------------------|------------------|-----------------|----------------|-----------------|--|--|--|
| ccessibility 💽 A' A' | | | | | | | <u>Site map Contact us Help</u> Logged in as: Vijay Mallya Log | | |
| ccess Manager Links | Business: ABC Shoes | BN: 1234567890 | | | | | | | |
| ome | You are here: Home » Wh | n has access to my | husiness » Modi | fy annointed h | isiness nermi | ssions | | | |
| y business | You are here: <u>Home</u> » <u>Who has access to my business</u> » Modify appointed business permissions | | | | | | | | |
| ccess and rmissions | Modify appointed business permissions < <u>Who has access to my business</u> | | | | | | | | |
| y clients | To modify the nermiss | ons assigned to th | e annointed hus | iness selectio | r de-select th | e check hoxes (| next to the appropriate permissions. The changes will be | | |
| estricted clients | submitted when you se | elect 'save'. | to appointed bac | | | | | | |
| usiness opointments | Business details | | | | | | | | |
| ho has access to my isiness | ABN: | 89083681823 | | | | | | | |
| hose business I can | Name: | C & G Shoes | | | | | | | |
| xternal Links | | Remove Bu | isiness Appointn | nent | | | | | |
| o.gov.au | Business permissions | | | | | | | | |
| isiness Portal | | | | | | | | | |
| ax Agent Portal | Select the permissions you want the above business to have access to when acting on your behalf and select the "Save" to button. | | | | | | | | |
| AS Agent Portal | | | | | | | | | |
| ıstralian Business egister | Clear All Clear All Business Details | | tuture enhancer | nents) for my t | ousiness | | | | |
| | View business registration de | tails | | | | | | | |
| | - Update business registration | | | | | | | | |
| | Add / Update financial institut | | | | | | | | |
| | View account details | | v | | | | | | |
| | Submit refund request | | | | | | | | |
| | Submit transfer request | | V | | | | | | |
| | | | View | Prepare | Lodgo | Revise | | | |
| | □ ATO Transactions | | View | Prepare | Lodge | V | | | |
| | Activity Statements | | V | | v | V | | | |
| | FBT return | | | | | | | | |
| | TFN declaration | | | | | | | | |
| | PAYG payment summary | | | | | | | | |
| | Non-individual income tax reti | ım | | | V | | | | |
| | SMSF annual return | | | | | | | | |
| | Cancel | | | | | | Save | | |



Australian Government



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

Step 4 – Select 'Confirm' to remove the business appointment

| | | Cite war Constant up. Hale Lawred in an Simon Contract |
|---------------------------------|--|---|
| Accessibility 0 A A* | | <u>Site map</u> <u>Contact us</u> <u>Help</u> Logged in as: Simon Scott <u>Logo</u> |
| Access Manager Links | Business: C & G Shoes ABN: 8 | 183681823 |
| Home | You are here: Home » Who has ac | iss to my business » Modify appointed business permissions » Confirm - Remove business appointment |
| My business | | |
| Access and | Confirm - Remove bus | |
| permissions | < Modify appointed business perr | <u>ssions</u> |
| My clients | | |
| Restricted clients | You have chosen to remove th appointment. | appointment of this business as an agent for the tax affairs of your business. Please select "Confirm" to remove the business |
| Business Appointments | | |
| Who has access to my | Appointed business detai | |
| business | ABN: 334720 | 866 |
| Whose business I can | | |
| access | Name: LAST S | PERANNUATION FUND |
| External Links | Current | Configure |
| ato.gov.au | Cancel | Confirm |
| Business Portal | i | i i |
| Tax Agent Portal | | |
| BAS Agent Portal | Cancel | User I Confirm I The business appointment is removed, takes |
| Australian Business Register | to 'Modify appointed busines permissions' page with a pro | user to 'Who has access to my business' with |



Home





| ions have been added. |
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| per forms |
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Whose business I can access

View permissions granted to business

Scenario - Assign access to my credential holders for appointing business

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

| | Accessibility O A A | | | Business details | in as: Ray Maan <u>Log</u> | out |
|------------------------------|--------------------------|--------------------|---|--|--|-----------------------------------|
| | Access Manager Links | Business: AB&C Co | onsolidated ABN: 72206706494 | | e details for the business. | |
| | Home | You are here: Home | » Whose business I can access | | | |
| | My business | Whose busin | ess I can access | | | |
| | Access and permissions | < <u>Home</u> | | | | Page level menu |
| | My clients | | | | | This menu display's |
| | Restricted clients | | ows the businesses that have appointed you to I | be an agent for their tax affairs. You can v | view details of the permissions that have been | the options available from the |
| Facility to | Business Appointments | Appointing bus | by a particular business by selecting its ABN. | | | current page. |
| search with | · Who has access to my | | | | | |
| the ABN or the Business | Whose business I can | - ABN: | and/or Business name: | Search | | |
| Name for | access | | | | | |
| businesses that have | External Links | ABN 🔶 | Business name | | Appointing businesses | |
| appointed | ato.gov.au | 75883430899 | BUCHANANE, ZIANG DONG F | | A list of business who have | |
| your business | Business Portal | <u>36686547538</u> | ASHZ UPHOLSTERERS | | appointed your business to be agent for tax purposes. | e an |
| as an agent for their tax | Tax Agent Portal | L | | | agent for tax purposes. | |
| affairs. | BAS Agent Portal | | | | | |
| | Australian Business | | | | | |
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Back

page.



Whose business I can

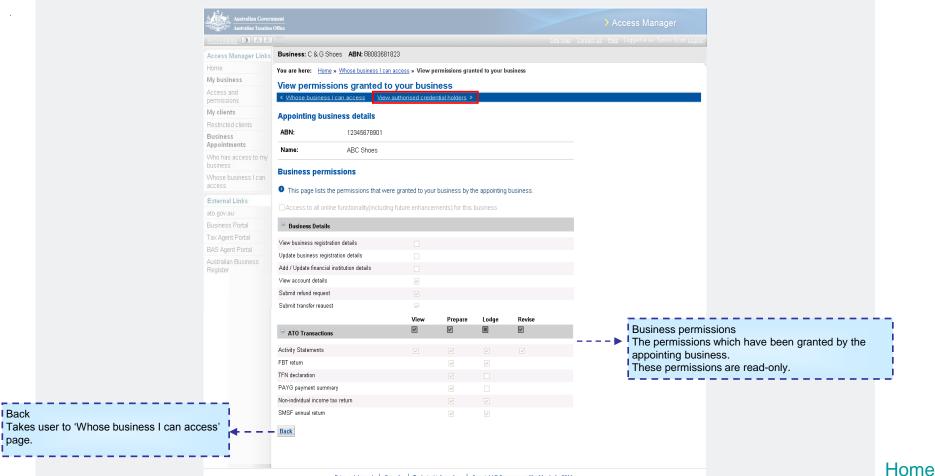
access

View permissions granted to business

> View authorised credential holders

Scenario - Assign access to my credential holders for appointing business

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



Back Takes user can access Australian Government

Whose business I can

access

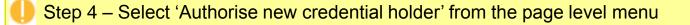
View permissions granted to business

View authorised credential holders

Authorise new credential holder (Select credential holder)

Home

Scenario - Assign access to my credential holders for appointing business



| Burlin and C. S. C. Channell, ABNI 08080804889 | |
|--|---|
| 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 | |
| < <u>View permissions granted to your business</u> <u>Authorise new credential holder</u> > | |
| | |
| Appointing husiness details | |
| ABN: 12345678901 | |
| Name: ABC Shoes | |
| | |
| | |
| Scott, Simon | Authorised credential holders |
| Back | already have been assigned acce to the appointing business. |
| | This page lists the credential holders from your business that have permissions assigned the appointing business. You can modify those assigned permissions by selecting a cred Appointing business details ABN: 12345678901 Name: ABC Shoes Authorised credential holders Surname and/or Firstname Search Name |

Australian Government

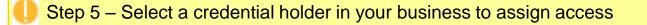
Whose business I can

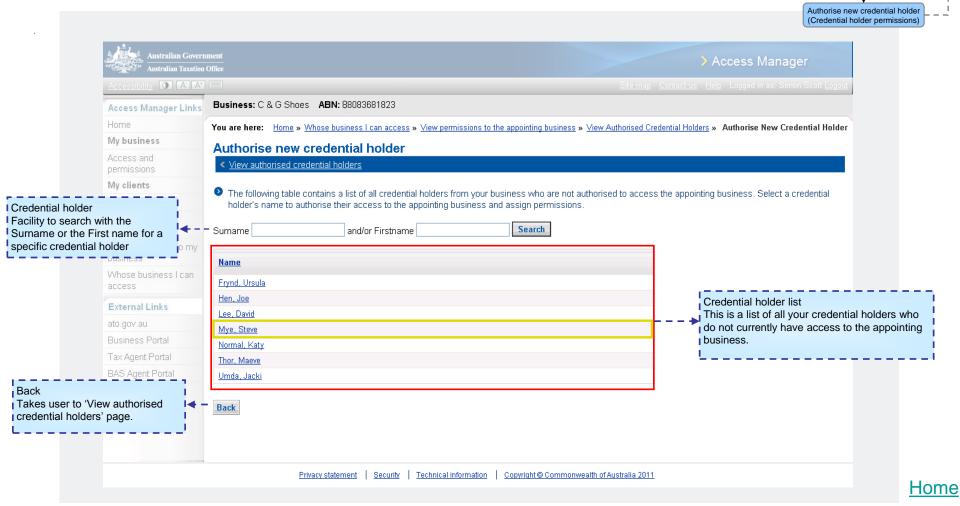
Access View permissions

View authorised

Authorise new credential holder (Select credential holder) Save

Scenario - Assign access to my credential holders for appointing business





Whose business I can

acces

View permissions

granted to business

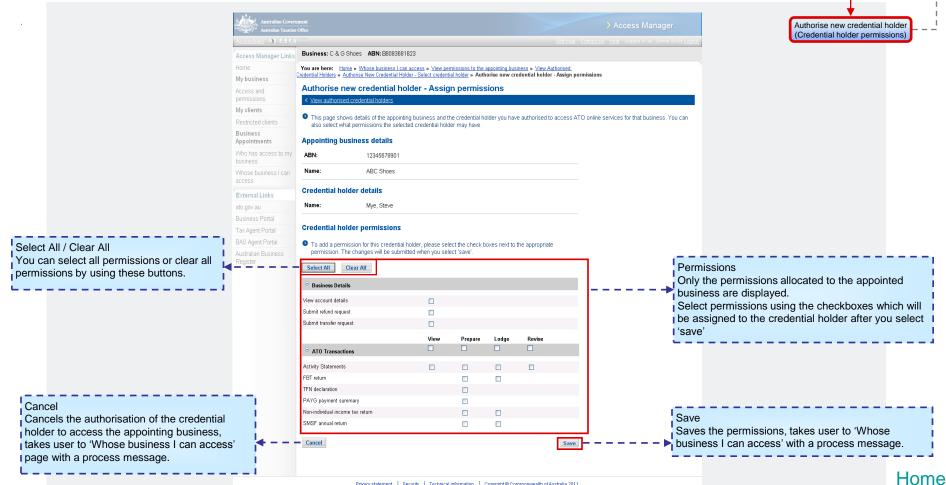
View authorised credential holders

Authorise new credential holder (Select credential holder)

Save

Scenario - Assign access to my credential holders for appointing business

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



Scenario – Removing access or modify the permissions I have assigned to my credential holders for an appointing business Access and permissions Restricted clients Who has access to my business Can access

| ETTA, VI TOAN B ABN: 11322827848 Agent number: Select tome » AM1TAPAdmin Request r contains all the core functions of Online Access Manager and s some additional features such as the copy permissions nction allows you to copy the permissions you have assigned to er and assign them to other staff. It can be accessed from the missions menu or via the quick link on this page. | t number 💌 S What's new The following new functional authorisations have been added. Eg: Web services: View and Lodge Super forms |
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| AM1TAPAdmin Request r contains all the core functions of Online Access Manager and s some additional features such as the copy permissions nction allows you to copy the permissions you have assigned to er and assign them to other staff. It can be accessed from the | The following new functional authorisations have been added. |
| r contains all the core functions of Online Access Manager and s some additional features such as the copy permissions nction allows you to copy the permissions you have assigned to er and assign them to other staff. It can be accessed from the | The following new functional authorisations have been added. |
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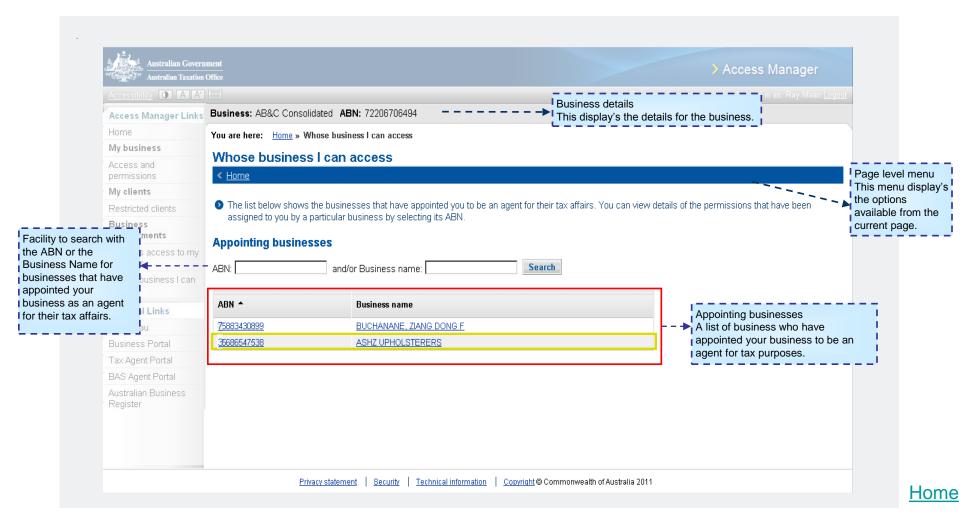
Whose business I can

access

View permissions granted to business

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

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



Back

page.



Whose business I can

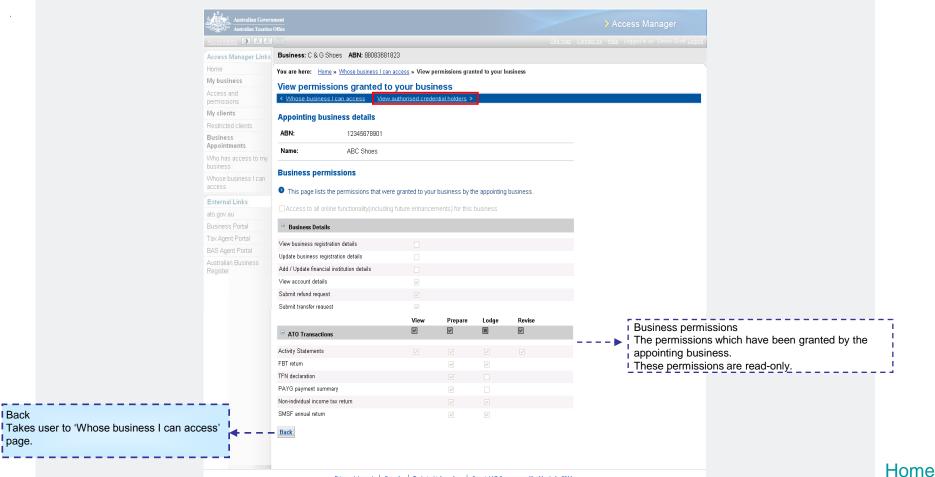
access

View permissions granted to business

> View authorised credential holders

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

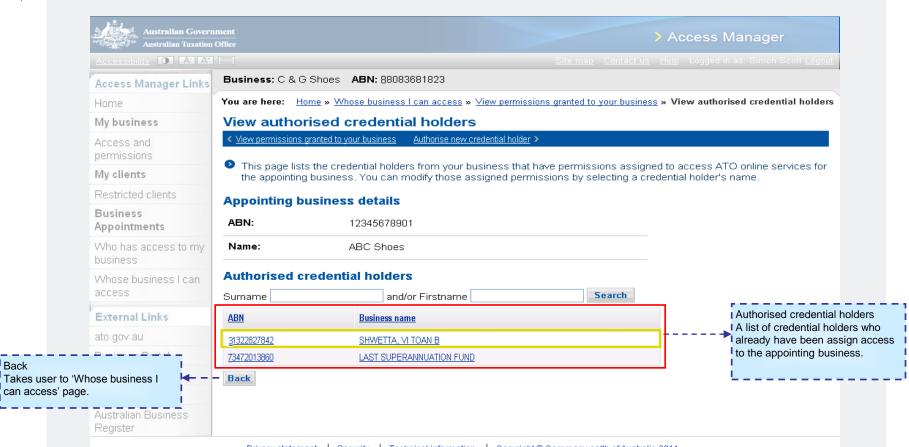
Step 3 – Select 'View authorised credential holders' from the page level menu



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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 Whose business I can

access

View permissions granted to business

View authorised credential holders

Modify credential

holder permissions

Home

Authorise new credential holder

(Select credential holder)

Whose business I can

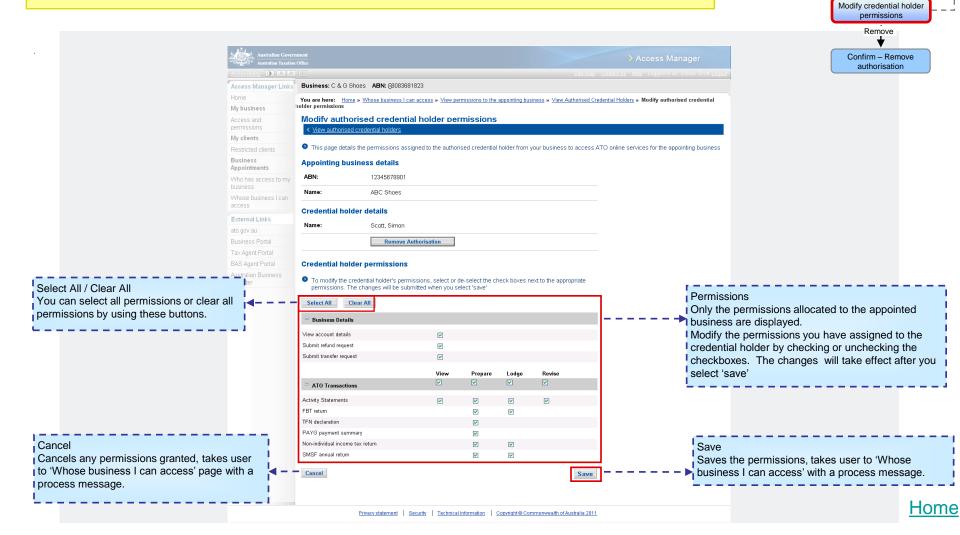
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View permissions granted to business

View authorised credential holders Save

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



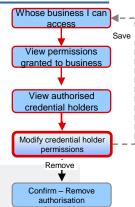
Cancel

Cancels the action and takes user authorised credential holders' page Australian Government 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'

| Accessibility O A 7 | | | | | | | | | | |
|----------------------------------|---|---|---------------------------------------|---|-----------------|---|----------------|--------------------|-------------------|-------|
| Access Manager | Business: C & G Sho | es ABN: 890836818 | 23 | | | | | | | |
| Links | You are here: Home > | VVhose business I can a | access » View per | nissions to the : | appointing bus | iness » View A | uthorised Cred | ential Holders » I | Modify authorise | d cri |
| Home | holder permissions | | | | | | | | | |
| Access and permissions | Modify authori | sed credential | holder per | missions | | | | | | |
| Restricted clients | < View authorised cri | edential holders | | | | | | | | |
| Who has access to my business | This page details t | he permissions assign | ed to the authori | sed credential | holder from y | our business | to access AT | O online servic | es for the appoir | nting |
| Whose business I can | Appointing busin | iess details | | | | | | | | |
| access | ABN: | 12345678901 | | | | | | | | |
| External Links | | | | | | | | | | |
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| Business Portal | Credential holde | r dotaile | | | | | | | | |
| Tax Agent Portal | | | | | | | | | | |
| BAS Agent Portal | Name: | Scott, Simon | | | | | | | | |
| Australian Business Register | | Remove Auth | orisation | | | | | | | |
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