

## 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

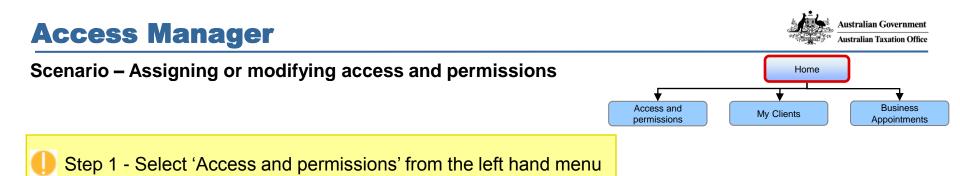
Business Appointments (Appointing Business)

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 <ul> <li>You are here: Home *</li> <li>You are here: Home *</li> </ul> My Disiness              Welcome AMITAPAdmin Request <ul> <li>You are here: Home *</li> <li>You are here: Home *</li> </ul> My Cleints              Velcome AMITAPAdmin Request <ul> <li>You are here: Home *</li> <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<></ul>	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 <b>Cuick Links</b> • 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

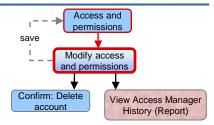
Step 2 - Select the credential holder

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 <b>ternal Links</b>	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 <b>ternal Links</b> 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



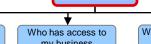
Step 3 – Assign or modify access and permissions

	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	<b>Credential Holder Access</b>							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	<ul> <li>The business tab displays the per the client tab displays the permiss select or de-select the check boxe you select 'Save'.</li> </ul>	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	<b></b>	permiss	sions' homepage with a process message.





Access and **Restricted clients** permissions



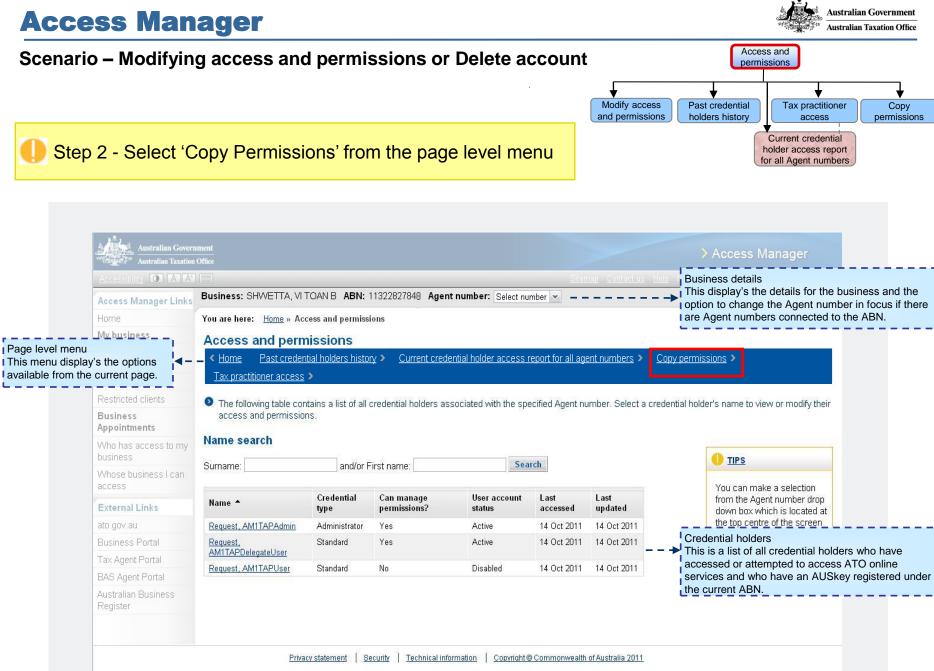
Home

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

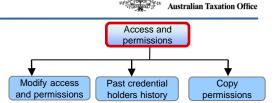
Accessibility 💽 🗛 🗛				
Access Manager Links	Business: SHWETTA, VI TOAN B ABN: 1132	2827848 Agent number: 15301011 💌		
Home	You are here: Home » Access and permissions »	Copy Permissions		
My business	Copy permissions			
Access and permissions	< Access and permissions			
My clients	Select a credential 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	<b>·····</b>	!
		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 <b>O</b> A A <sup>+</sup>			<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

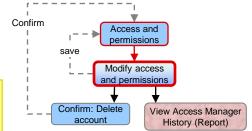
History (Report)

Home

#### Scenario – Manage Access – Disable Account

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

Australian Taxation			Access Manager			
Accessibility <b>O A</b> 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				

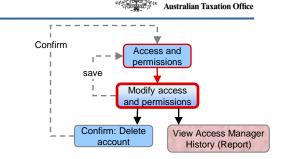




Home

#### 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>

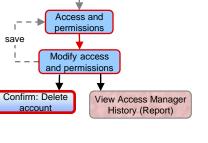
Australian Government

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

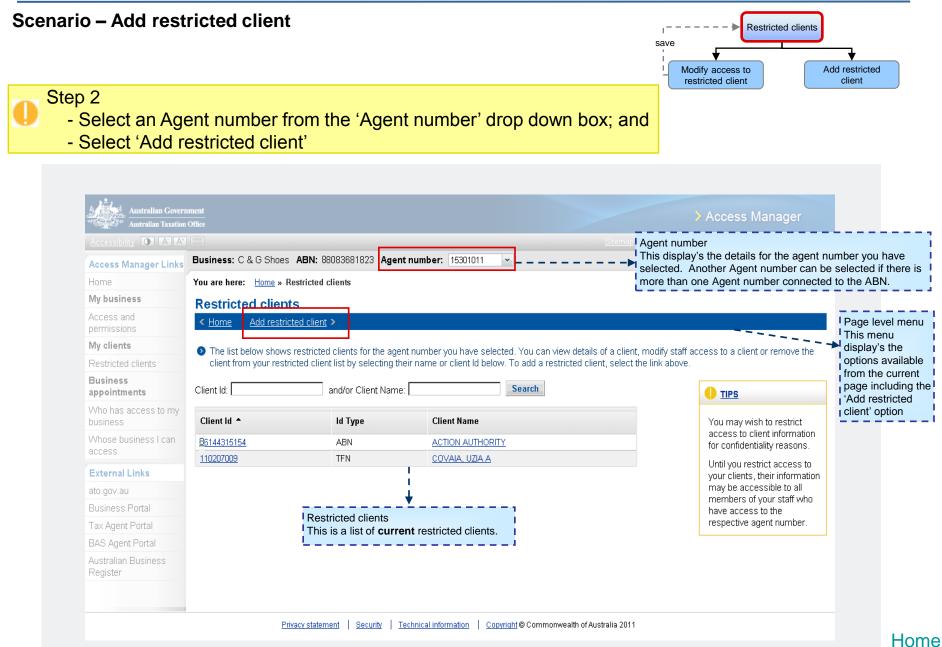




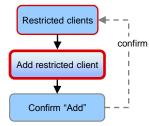
Step 1 - Select 'Restricted clients' from the left hand menu

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		





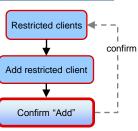
#### Scenario – Add restricted client



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 &amp; 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	<sup>SS</sup> 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'

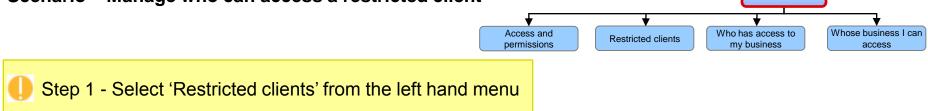
Accessibility O A At		<u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logout</u>
Access Manager Links	Business: MON VI TOAN BENITZ SHWETTA	ABN: 11322827848 Agent number: 15301011 Ø
Home	You are here: Home » Restricted Clients » Add R	estricted Client » Confirm - Add 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

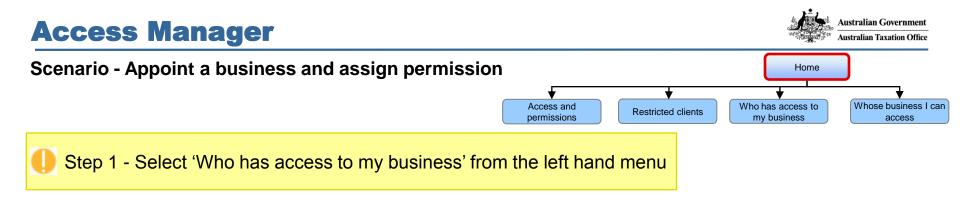
-

#### Scenario – Manage who can access a restricted client

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

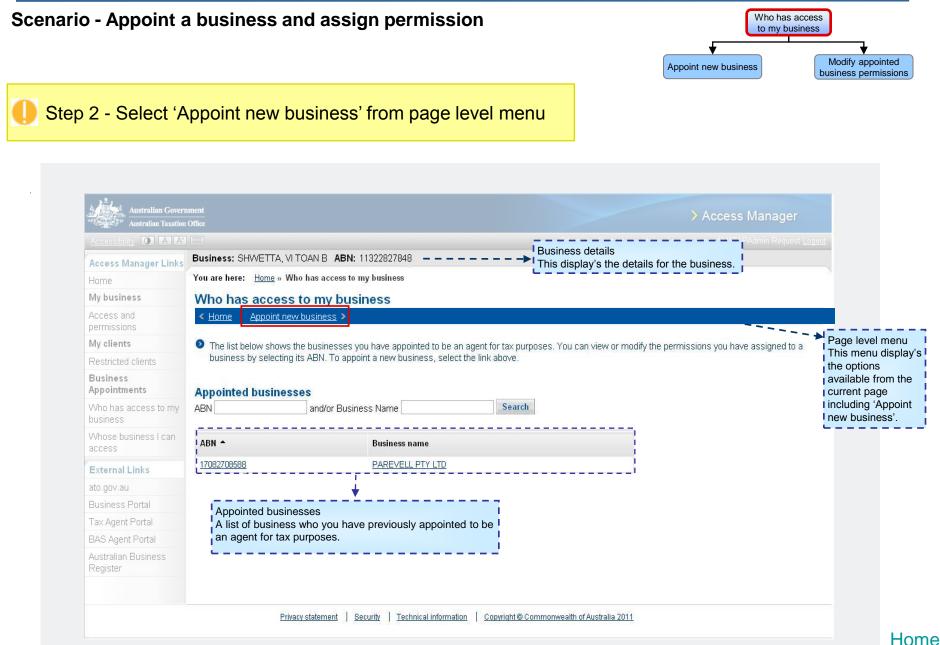
	Australian Taxation		> Access Manager	
	Accessibility <b>O A</b> <sup>*</sup> <b>A</b> <sup>*</sup>	Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: 16301011	iged in as: AM1TAPAdmin Request <u>Logout</u>	
	Access Manager Links			
	Home	You are here: Home » Restricted clients » Modify Access 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**

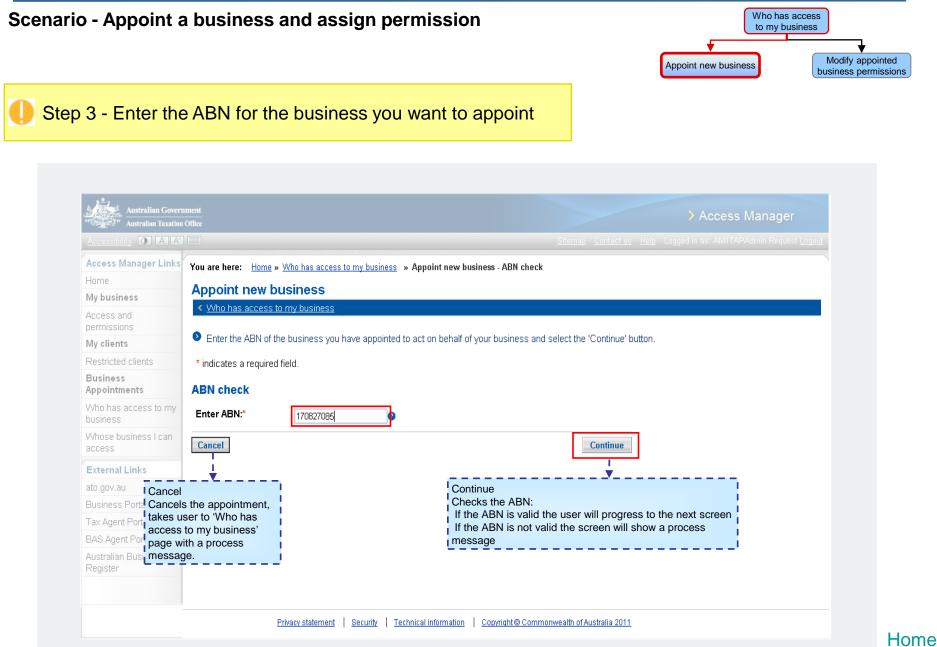


Accessibility 0 A At		<u>Sitemap</u> <u>Contact us</u> <u>Help</u> Logged in as: AM1TAPAdmin Request <u>Logo</u>		
Access Manager Links	Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select nu	mber 💌		
Home	You are here: Home »			
My business				
Access and permissions	Welcome AM1TAPAdmin 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



Australian Government Australian Taxation Office



Step 4 – Assign permissions

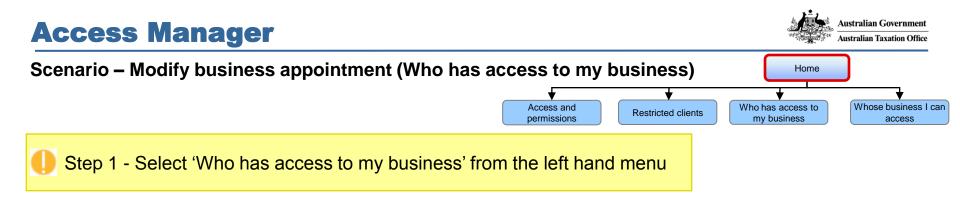
#### Scenario - Appoint a business and assign permission

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

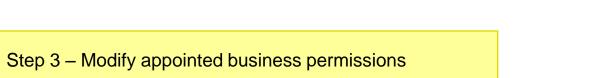
Modify appointed business permissions

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		<b>V</b>						
		Activity Statements	V		<b>V</b>					
		FBT return		<b>V</b>	<b>V</b>					
		TFN declaration								
		PAYG payment summary								
		Non-individual income tax return			<b>V</b>					
ncel		SMSF annual return		V	<b>V</b>			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				

Australian Government

Australian Taxation Office

Australian Government Australian Taxation Office

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

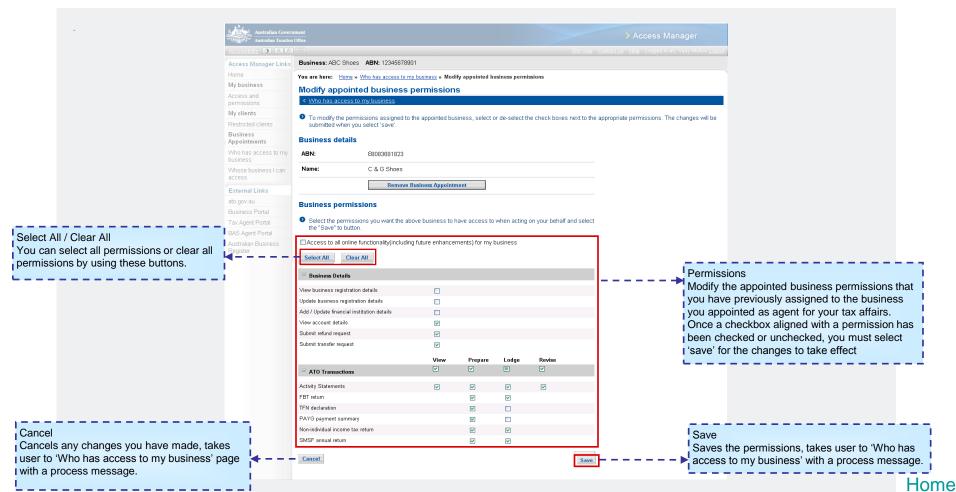


Step 2 - Select the appointed business

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		<b>v</b>						
	Submit refund request								
	Submit transfer request		<b>V</b>						
			View	Prepare	Lodgo	Revise			
	□ ATO Transactions		View	Prepare	Lodge	<b>V</b>			
	Activity Statements		<b>V</b>		<b>v</b>	<b>V</b>			
	FBT return								
	TFN declaration								
	PAYG payment summary								
	Non-individual income tax reti	ım			<b>V</b>				
	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.
per forms



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					

Back

page.



Whose business I can

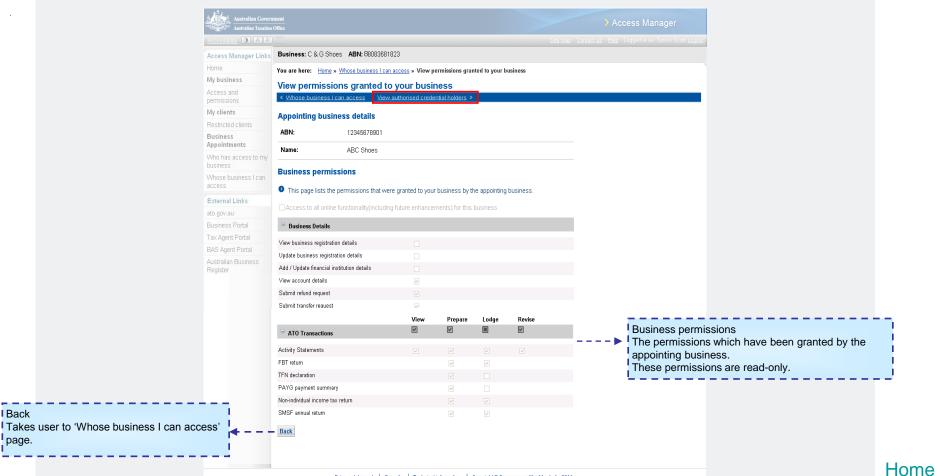
access

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

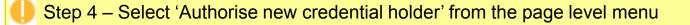
View permissions granted to business

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.
	<ul> <li>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</li> <li>Appointing business details</li> <li>ABN: 12345678901</li> <li>Name: ABC Shoes</li> <li>Authorised credential holders</li> <li>Surname and/or Firstname Search</li> <li>Name</li> </ul>

Australian Government

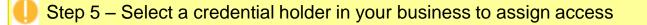
Whose business I can

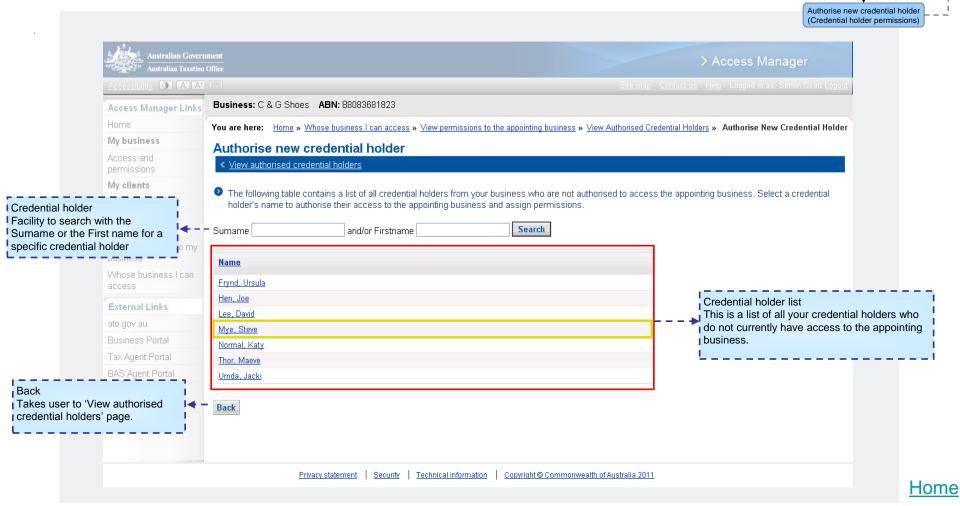
Access View permissions

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

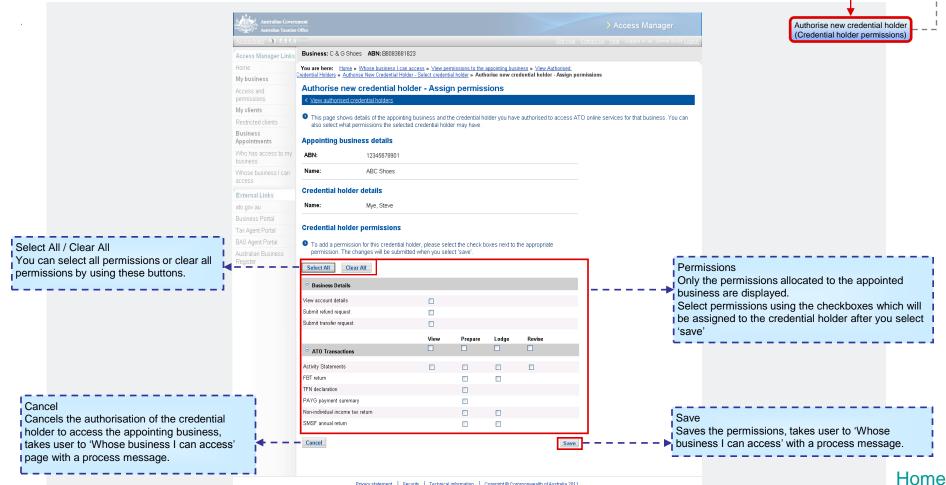
View authorised credential holders

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
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.
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.
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.
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	
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	
nissions	





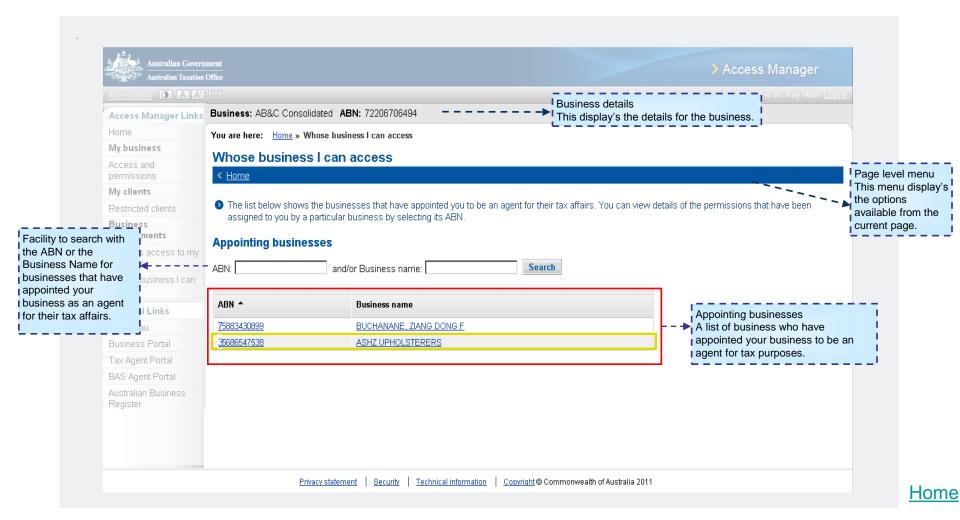
Whose business I can

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

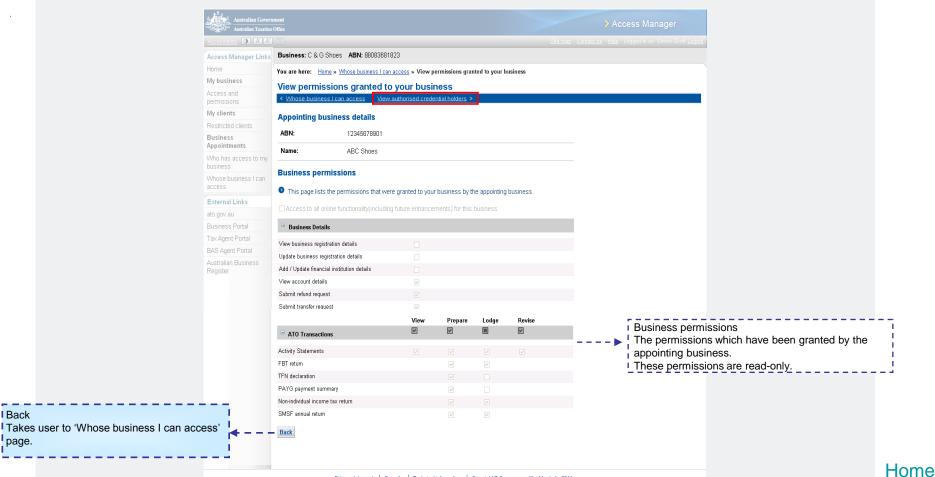
access

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

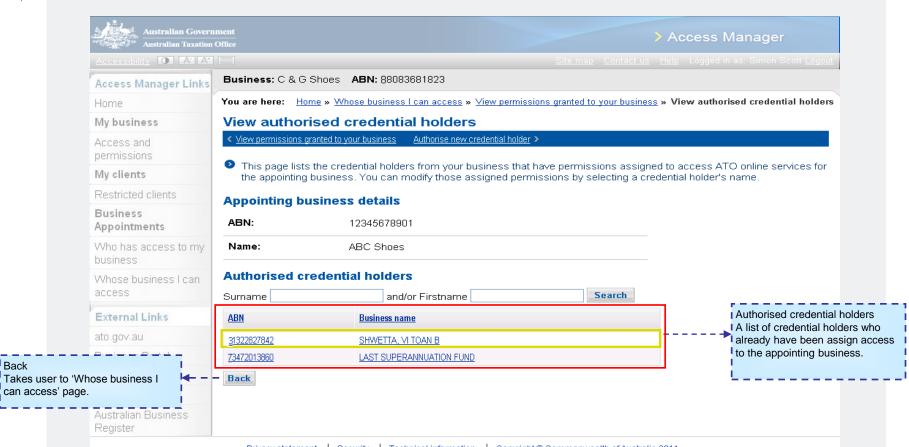
Step 3 – Select 'View authorised credential holders' from the page level menu



Back

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

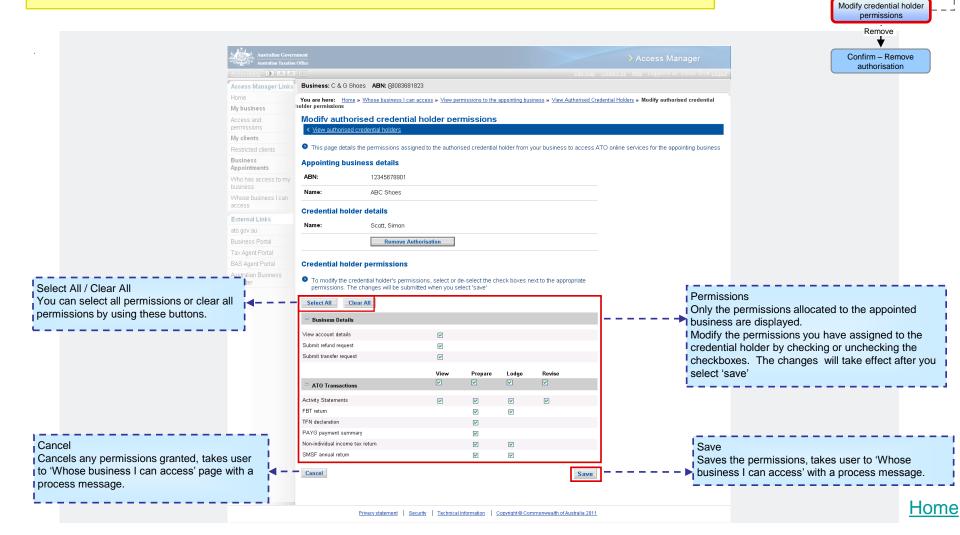
acces

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



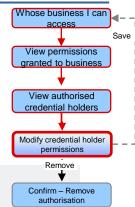
Cancel

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										
ato.gov.au	Name:	ABC Shoes								
Business Portal	Credential holde	r dotaile								
Tax Agent Portal										
BAS Agent Portal	Name:	Scott, Simon								
Australian Business Register		Remove Auth	orisation							
	Credential holde To modify the creater permissions. The	r permissions dential holder's permiss changes will be submit	sions, select or d ted when you se	e-select the ch lect 'save'	eck boxes ne	ext to the appr	opriate			
	To modify the cred permissions. The	dential holder's permiss	sions, select or d ted when you se	e-select the ch lect 'save'	eck boxes ne	ext to the appr	opriate			
	<ul> <li>To modify the crect permissions. The</li> <li>Select All Clear</li> <li>Business Details</li> </ul>	dential holder's permiss changes will be submit	ted when you se	e-select the ch lect 'save'	eck boxes ne	ext to the appr	opriate			
	<ul> <li>To modify the creer permissions. The select All Clear</li> <li>Business Details</li> <li>View account details</li> </ul>	dential holder's permiss changes will be submit	ted when you se	e-select the ch lect 'save'	eck boxes ne	ext to the appr	opriate			
	<ul> <li>To modify the crect permissions. The</li> <li>Select All Clear</li> <li>Business Details</li> </ul>	dential holder's permiss changes will be submit	ted when you se	e-select the ch lect 'save'	eck boxes ne	ext to the appr	opriate			
	<ul> <li>To modify the creat permissions. The select All</li> <li>Business Details</li> <li>View account details</li> <li>Submit refund request</li> </ul>	dential holder's permiss changes will be submit	ted when you se V V	e-select the ch lect 'save' Prepare	eck boxes ne	ext to the approximation of the second se	opriate			
	<ul> <li>To modify the creat permissions. The select All</li> <li>Business Details</li> <li>View account details</li> <li>Submit refund request</li> </ul>	dential holder's permiss changes will be submit	ted when you se V V V	lect 'save'			opriate			
	To modify the crec permissions. The Select All Clex     Business Details View account details Submit refund request Submit transfer request	dential holder's permiss changes will be submit	ted when you se V V View	Prepare	Lodge	Revise	opriate			
	To modify the creat permissions. The Select All Cleat Business Details View account details Submit refund request Submit transfer request	dential holder's permiss changes will be submit	ted when you se V V View	Prepare	Lodge V	Revise V	opriate			
	To modify the cree permissions. The     Select All     Gete     Business Details     View account details     Submit refund request     Submit transfer request     Contractions     Activity Statements	dential holder's permiss changes will be submit	ted when you se V V View	Prepare V	Lodge V	Revise V	opriate			
	To modify the cree permissions. The     Select All     Cree     Business Details     View account details     Submit refund request     Submit transfer request     Contransactions     Activity Statements     FBT return	antial holder's permiss changes will be submit	ted when you se V V View	Prepare V V	Lodge V	Revise V	opriate			
	To modify the creater permissions. The     Select All     Creater     Business Details     View account details     Submit fund request     Submit transfer request     Contractions     Activity Statements     FBT return     TFN declaration	ry	ted when you se V V View	Prepare V V V	Lodge V	Revise V	opriate			
	To modify the crec permissions: The     Select All     Crec Business Details     View account details     Submit refund request     Submit transfer request     Activity Statements     FBT return     TFN declaration     PAYG payment summa	ry	ted when you se V V View	Prepare V V V V	Lodge V V	Revise V	opriate			



Australian Government

Home

