

Help scenarios

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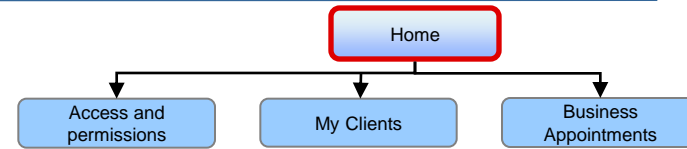
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Scenario – Assigning or modifying access and permissions



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

Access Manager Links

- Home
- My business**
- Access and permissions**
- My clients**
- Restricted clients
- Business Appointments**
- Who has access to my business
- Whose business I can access
- External Links**
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:**

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

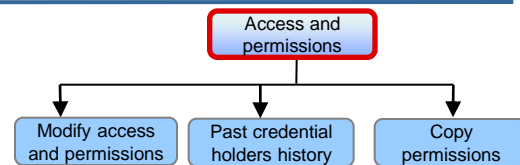
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario – Assigning or modifying access and permissions



Step 2 - Select the credential holder

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

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

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

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:**

You are here: [Home](#) » [Access and permissions](#)

Access and permissions

[< Home](#) [Past credential holders history >](#) [Current credential holder access report for all agent numbers >](#) [Copy permissions >](#)

[Tax practitioner access >](#)

The following table contains a list of all credential holders associated with the specified Agent number. Select a credential holder's name to view access and permissions.

Name search

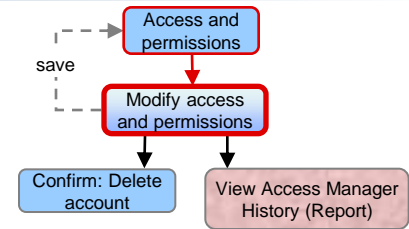
Surname: and/or First name:

Name ^	Credential type	Can manage permissions?	User account status	Last accessed	Last updated
Request_AM1TAPAdmin	Administrator	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPDelegateUser	Standard	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPUser	Standard	No	Disabled	14 Oct 2011	14 Oct 2011

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Scenario – Assigning or modifying access and permissions

Step 3 – Assign or modify access and permissions



Credential Holder Access

Name: Anderson, Bobby

Access administrator: No Yes

Account status: Active Disabled

Permissions

Access to all online functionality (including future enhancements) for my business

	View	Prepare	Lodge	Revise
My Business Details	<input type="checkbox"/>			
View business registration details	<input type="checkbox"/>			
Update business registration details	<input type="checkbox"/>			
Add / Update financial institution details	<input type="checkbox"/>			
View account details	<input type="checkbox"/>			
Submit refund request	<input type="checkbox"/>			
Submit transfer request	<input type="checkbox"/>			
ATO Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FBT return		<input type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary		<input type="checkbox"/>	<input type="checkbox"/>	
TFN declaration		<input type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return		<input type="checkbox"/>	<input type="checkbox"/>	
SMSF annual return		<input type="checkbox"/>	<input type="checkbox"/>	
Administration	<input type="checkbox"/>			
View and action own mail	<input type="checkbox"/>			
Access other user' mail	<input type="checkbox"/>			

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

TIPS
Disabling an account temporarily removes user's access to services.
Deleting a user's permanently removes access to ATO's services.
Select link to view which permissions are available on specific applications.

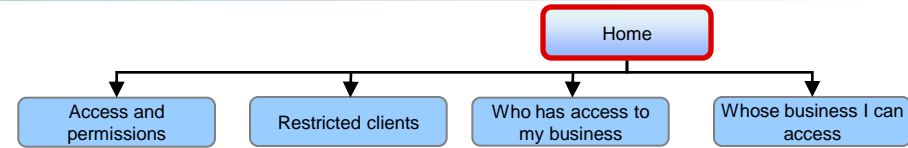
Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

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

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

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

Scenario – Copy permissions



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

Australian Government
Australian Taxation Office

Accessibility [Icons]

Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout

Access Manager Links

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

External Links

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

Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select number

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

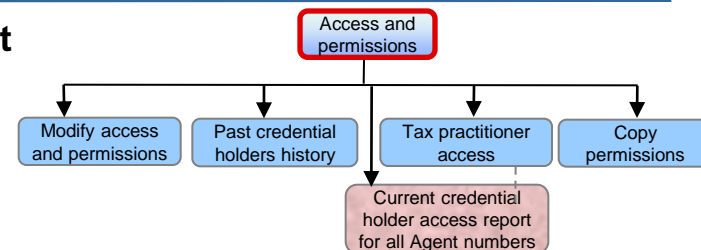
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario – Modifying access and permissions or Delete account



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

Australian Government
Australian Taxation Office

Accessibility Sitemap Contact us Help

Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number:

You are here: [Home](#) » [Access and permissions](#)

Access and permissions

[Home](#) [Past credential holders history](#) [Current credential holder access report for all agent numbers](#) [Copy permissions](#) [Tax practitioner access](#)

The following table contains a list of all credential holders associated with the specified Agent number. Select a credential holder's name to view or modify their access and permissions.

Name search

Surname: and/or First name:

Name ^	Credential type	Can manage permissions?	User account status	Last accessed	Last updated
Request_AM1TAPAdmin	Administrator	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPDelegateUser	Standard	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPUser	Standard	No	Disabled	14 Oct 2011	14 Oct 2011

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Access Manager

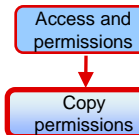
Business details
This display's the details for the business and the option to change the Agent number in focus if there are Agent numbers connected to the ABN.

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

TIPS
You can make a selection from the Agent number drop down box which is located at the top centre of the screen

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

Scenario – Modifying access and permissions or Delete account



Step 3

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

The screenshot shows the 'Copy permissions' page in the Access Manager interface. The page title is 'Copy permissions' and the breadcrumb is 'Home » Access and permissions » Copy Permissions'. A navigation menu on the left includes 'Access Manager Links', 'My business', 'My clients', and 'Business Appointments'. The main content area has a 'Select user' section with a 'Copy permissions from' dropdown menu set to 'Request, AM1TAPUser'. Below this is a list of credential holders to copy permissions to, with checkboxes for 'Hen, Joe', 'Lee, David', 'Normal, Katy', and 'Thor, Maeve'. A 'Save' button is at the bottom of the list, and a 'Cancel' button is at the bottom left. A 'TIPS' box on the right explains that copying permissions to a user with existing permissions will add to them. Annotations in blue dashed boxes explain the 'Cancel' and 'Save' buttons and the 'Copy permissions to' list.

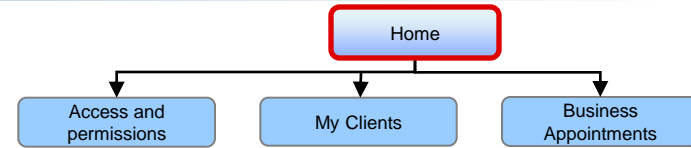
Cancel
Cancels the change to permissions, takes user to 'Access and permissions' page with a process message.

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

Copy permissions to
List of all current credential holders except the credential holder selected in the 'Copy permissions from' drop down list. You must select one and may select as many as you like.

TIPS
If you copy permissions to a credential holder, any permissions already assigned to them will be

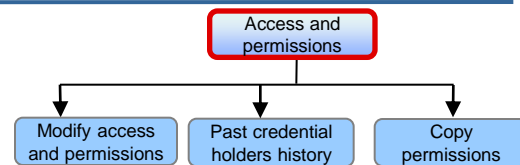
Scenario – Manage Access



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

The screenshot shows the Access Manager web application interface. At the top, there is a blue header with the Australian Government logo and the text 'Access Manager'. Below the header, there is a navigation bar with 'Accessibility' options and a 'Logged in as: AM1TAPAdmin Request Logout' link. The main content area is divided into a left-hand menu and a main content area. The left-hand menu includes sections for 'Access Manager Links', 'My business', 'My clients', 'Business Appointments', and 'External Links'. The 'Access and permissions' link under 'My business' is highlighted with a red box. The main content area displays the business name 'SHWETTA, VI TOAN B', ABN, and agent number. It also features a 'Welcome AM1TAPAdmin Request' message, an 'Updates' section with a paragraph of text, and a 'Quick Links' section with a link to 'Copy Permissions'. A 'What's new' section is also visible on the right side of the main content area.

Scenario – Manage Access



Step 2 - Select the credential holder

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:**

You are here: [Home](#) » [Access and permissions](#)

Access and permissions

[< Home](#) [Past credential holders history >](#) [Current credential holder access report for all agent numbers >](#) [Copy permissions >](#)

[Tax practitioner access >](#)

The following table contains a list of all credential holders associated with the specified Agent number. Select a credential holder's name to view access and permissions.

Name search

Surname: and/or First name:

Name ^	Credential type	Can manage permissions?	User account status	Last accessed	Last updated
Request_AM1TAPAdmin	Administrator	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPDelegateUser	Standard	Yes	Active	14 Oct 2011	14 Oct 2011
Request_AM1TAPUser	Standard	No	Disabled	14 Oct 2011	14 Oct 2011

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

Page level menu
This menu displays the options available from the current page.

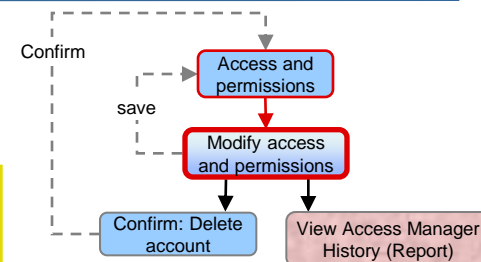
TIPS
You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated

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

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Scenario – Manage Access – Access administrator

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



Access Manager

Business: SHWETTA, VI TOAN B ABN: 11322827848

You are here: [Home](#) » [Access and permissions](#) » [Modify access and permissions](#)

Modify access and permissions

[← Access and permissions](#) [View access manager history >](#)

• You can modify a user's access on this page using the radio button options below. To submit the changes, select 'Save'.

Credential Holder Access

Name: Request, AM1TAPDelegateUser

Access administrator: No Yes

Account status: Active Disabled

[Delete account](#)

Access Administrator
A Standard user can be granted access to AM by selecting the 'yes' radio button. This will allow them to assign access and permissions for other Standard users. This access can be removed by selecting the 'No' radio button.
The account is updated once the changes have been saved.

TIPS

Disabling an account temporarily removes a user's access to ATO online services.

Deleting a user's account permanently removes their access to ATO online services.

Select link to view which permissions are available on specific [applications](#).

Permissions


• The business tab displays the permissions that can be assigned to a credential holder for your business and the client tab displays the permissions that can be assigned for your clients. To modify a user's permissions, select or de-select the check boxes next to the appropriate permissions. The changes will be submitted when you select 'Save'.

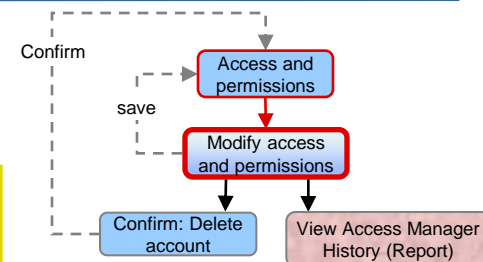
Business **Client**

Access to all online functionality(including future enhancements) for my clients

[Select All](#) [Clear All](#)

Scenario – Manage Access – Disable Account

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



Access Manager

Business: SHWETTA, VI TOAN B ABN: 11322827848

You are here: [Home](#) » [Access and permissions](#) » [Modify access and permissions](#)

Modify access and permissions

[← Access and permissions](#) [View access manager history >](#)

Credential Holder Access

Name: Request, AM1TAPDelegateUser

Access administrator: No Yes

Account status: Active Disabled [Delete account](#)

Permissions

Business **Client**

Access to all online functionality(including future enhancements) for my clients

[Select All](#) [Clear All](#)

Account status
A credential holder's account may be disabled by selecting the 'Disabled' radio button. If the account is disabled, the credential holder will not be able to access AM or any ATO online services such as Portals. A disabled account can be reactivated by selecting the 'Active' radio button. The account is updated once the changes have been saved.

TIPS

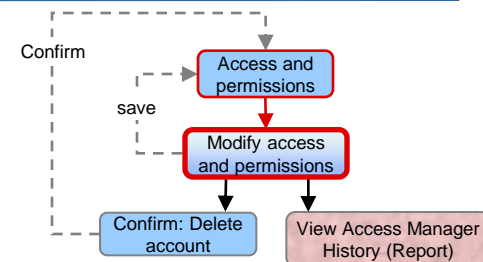
Disabling an account temporarily removes a user's access to ATO online services.

Deleting a user's account permanently removes their access to ATO online services.

Select link to view which permissions are available on specific [applications](#).

Scenario – Manage Access - Delete account

Step 3c – Select 'Delete account'



Credential Holder Access

Name: Request, AM1TAPDelegateUser

Access administrator: No Yes

Account status: Active Disabled

Delete account

Permissions

Access to all online functionality(including future enhancements) for my clients

Select All Clear All

TIPS

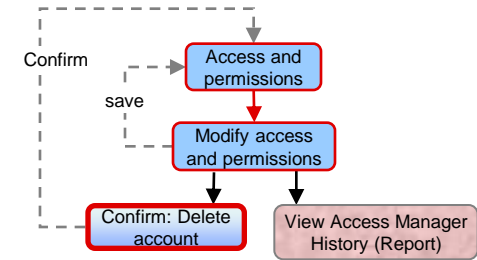
Disabling an account temporarily removes a user's access to ATO online services.

Deleting a user's account permanently removes their access to ATO online services.

Select link to view which permissions are available on specific [applications](#).

Scenario – Manage Access - Delete account

Step 4 – Select 'Confirm' to delete the account



Confirm - Delete account

< [Access and permissions](#)

• If you delete this credential holder's account, this credential holder will not be able to access ATO online services. Select 'Confirm' to delete the credential holder's account.

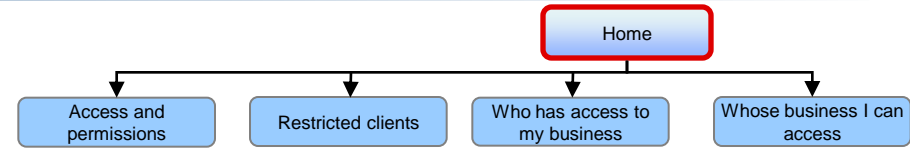
Name: Request, AM1TAPDelegateUser

Cancel
Cancels the deletion, takes user to 'Modify access and permissions' page with a process message.

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

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Scenario – Add a restricted client



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

Access Manager Links

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

External Links

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

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

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

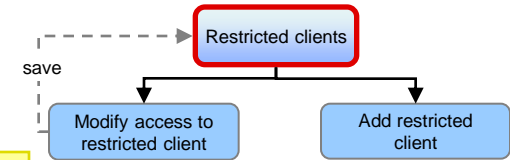
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario – Add restricted client



Step 2

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

Agent number
This display's the details for the agent number you have selected. Another Agent number can be selected if there is more than one Agent number connected to the ABN.

Restricted clients
This is a list of **current** restricted clients.

TIPS
You may wish to restrict access to client information for confidentiality reasons.
Until you restrict access to your clients, their information may be accessible to all members of your staff who have access to the respective agent number.

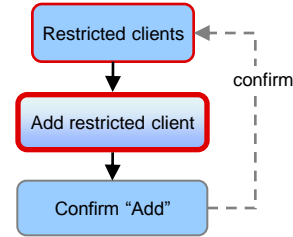
Page level menu
This menu display's the options available from the current page including the 'Add restricted client' option

Client Id ^	Id Type	Client Name
86144315154	ABN	ACTION AUTHORITY
110207009	TFN	COVAIA, UZIA A

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Scenario – Add restricted client

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



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

You are here: [Home](#) » [Restricted clients](#) » Add restricted client

Add restricted client

< [Restricted clients](#)

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

Client Id: and/or Client Name:

Client Id	Id Type	Client Name ^
85075056058	ABN	A & A ASSOCIATES PTY LTD RAED
68083112056	ABN	A & A ASSOCIATES PTY. LIMITED RAED
32000070276	ABN	A & A CONSTRUCTIONS PTY LTD
81080852535	ABN	A & A PTY LTD
42026625	TFN	A & A PTY. LIMITED
78082496697	ABN	A & H AGENCIES PTY LTD
32876841391	ABN	A & H MANAGEMENT SERVS PTY LTD
76089953948	ABN	A & H.P. SERVICES PTY LIMITED
52857916257	ABN	A & I CONSTRUCTIONS PTY LTD
77000058644	ABN	A & S CONSTRUCTIONS PTY LTD

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

TIPS

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

Client list

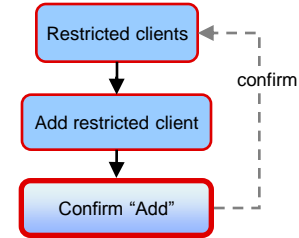
This is a list of all unrestricted clients who are associated with the selected Agent number are displayed.

Cancel

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

Scenario – Add restricted client

Step 3 - Select 'Confirm'



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

You are here: [Home](#) » [Restricted Clients](#) » [Add Restricted Client](#) » **Confirm - Add restricted client**

Confirm - Add restricted client

[< Restricted 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.

Client details

ABN: 77000054444

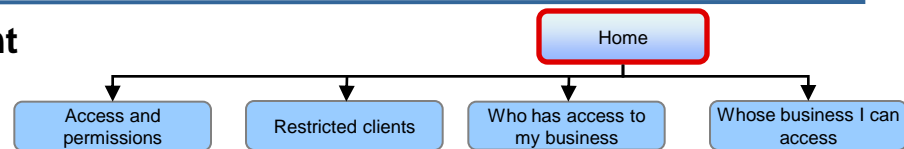
Name: A & S CONSTRUCTIONS PTY LTD

Cancel
Cancels the restriction, takes user to 'Restricted clients' page with a process message.

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.

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Scenario – Manage who can access a restricted client



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

Access Manager Links

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

External Links

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

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

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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Quick Links

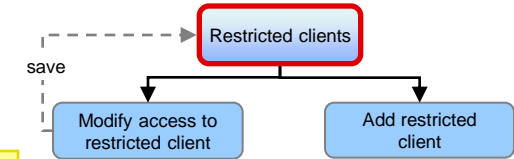
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario – Manage who can access a restricted client



Step 2

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

Business: C & G Shoes ABN: 88083681823 Agent number: 15301011

You are here: [Home](#) » Restricted clients

Restricted clients

< [Home](#) [Add restricted client](#) >

The list below shows restricted clients for the agent number you have selected. You can view details of a client, modify staff access to a client or remove the client from your restricted client list by selecting their name or client Id below. To add a restricted client, select the link above.

Client Id: and/or Client Name: [Search](#)

Client Id ^	Id Type	Client Name
36144315454	ABN	COLERIL TOD
110207009	TFN	COVAIA, UZIA A

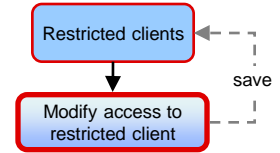
Business details
This display's the details for the business and the option to change the Agent number in focus if there are Agent numbers connected to the ABN.

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

TIPS
You may wish to restrict access to client information for confidentiality reasons.
Until you restrict access to your clients, their information may be accessible to all members of your staff who have access to the respective agent number.

Restricted clients
This is a list of current restricted clients.

Scenario – Manage who can access a restricted client



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

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:** 15301011

You are here: [Home](#) » [Restricted clients](#) » [Modify Access to Restricted Client](#)

Modify access to restricted client

[< Restricted clients](#)

Restricted client details

ABN: 19001777733
Name: COLERIL TOD

[Remove Restriction](#)

Credential holders

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.

<input checked="" type="checkbox"/>	Request, AM1TAPAdmin
<input checked="" type="checkbox"/>	Scott, Simon

[Cancel](#) [Save](#)

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

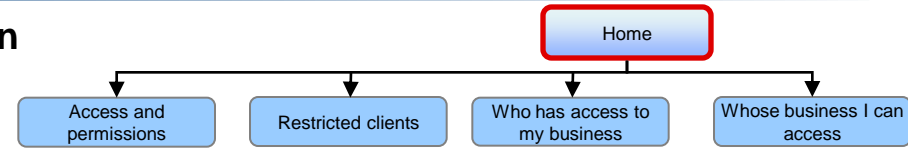
Cancel
Cancels the action, clears the changes you have made to the list and takes user to 'Restricted clients' page with a process message.

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

TIPS
Greyed out credential holders shown in the list have access to all restricted clients because they have the 'Access to all restricted clients' permission selected. To remove their access, you must first deselect the 'Access to all restricted clients' permission for the relevant credential holder on the 'Modify access and permissions' screen.

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Scenario - Appoint a business and assign permission



! Step 1 - Select 'Who has access to my business' from the left hand menu

Access Manager Links

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

External Links

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

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:** Select number

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

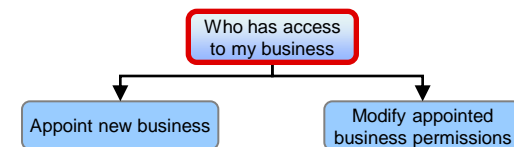
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario - Appoint a business and assign permission



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

Business: SHWETTA, VI TOAN B ABN: 11322827848

You are here: [Home](#) » [Who has access to my business](#)

Who has access to my business

[< Home](#) **Appoint new business** [>](#)

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 business by selecting its ABN. To appoint a new business, select the link above.

Appointed businesses

ABN and/or Business Name

ABN ^	Business name
17082708588	PAREVELL PTY LTD

Appointed businesses
A list of business who you have previously appointed to be an agent for tax purposes.

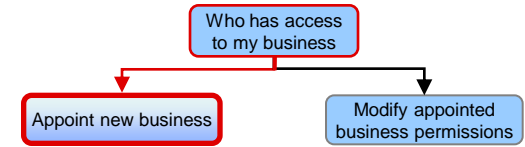
Business details
This display's the details for the business.

Page level menu
This menu display's the options available from the current page including 'Appoint new business'.

ato.gov.au | Business Portal | Tax Agent Portal | BAS Agent Portal | Australian Business Register

Privacy statement | Security | Technical information | Copyright © Commonwealth of Australia 2011

Scenario - Appoint a business and assign permission



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

Australian Government
Australian Taxation Office

Access Manager

Accessibility

Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout

Access Manager Links

- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business Appointments
- Who has access to my business
- Whose business I can access
- External Links
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

You are here: [Home](#) » [Who has access to my business](#) » [Appoint new business - ABN check](#)

Appoint new business

[< Who has access to my business](#)

Enter the ABN of the business you have appointed to act on behalf of your business and select the 'Continue' button.

* indicates a required field.

ABN check

Enter ABN:*

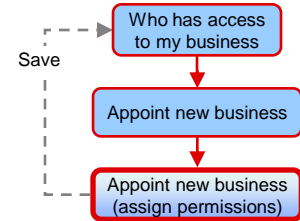
Cancel
Cancels the appointment, takes user to 'Who has access to my business' page with a process message.

Continue
Checks the ABN:
If the ABN is valid the user will progress to the next screen
If the ABN is not valid the screen will show a process message

[Privacy statement](#) | [Security](#) | [Technical information](#) | [Copyright © Commonwealth of Australia 2011](#)

Scenario - Appoint a business and assign permission

Step 4 – Assign permissions



Business: ABC Shoes **ABN:** 12345678901

You are here: [Home](#) » [Who has access to my business](#) » [Appoint new business - ABN check](#) » [Appoint new business](#)

Appoint new business - assign permissions

[Who has access to my business](#)

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, the changes you have made will be in effect.

Business details

ABN: 88083681823

Name: C & G Shoes

[Remove Business Appointment](#)

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.

Access to all online functionality(including future enhancements) for my business

[Select All](#) [Clear All](#)

	View	Prepare	Lodge	Revise
Business Details				
View business registration details	<input type="checkbox"/>			
Update business registration details	<input type="checkbox"/>			
Add / Update financial institution details	<input type="checkbox"/>			
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

[Cancel](#) [Save](#)

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

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

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

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

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



! Step 1 - Select 'Who has access to my business' from the left hand menu

Australian Government
Australian Taxation Office

Access Manager

Accessibility [Icons]

Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout

Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select number

Access Manager Links

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

External Links

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

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

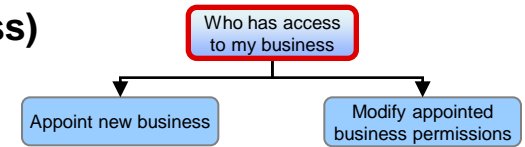
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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



Step 2 - Select the appointed business

Business details
This display's the details for the business.

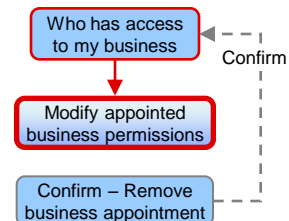
Page level menu
This menu display's the options available from the current page.

Appointed businesses
A list of business who you have previously appointed to be an agent for tax purposes.

ABN	Business name
11322827848	SHWETTA, VI TOAN B
33472013868	LAST SUPERANNUATION FUND

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



Step 3 – Modify appointed business permissions

Business: ABC Shoes **ABN:** 12345678901

You are here: Home » Who has access to my business » Modify appointed business permissions

Modify appointed business permissions

[Who has access to my business](#)

To modify the permissions assigned to the appointed business, select or de-select the checkboxes next to the appropriate permissions. The changes will be submitted when you select 'save'.

Business details

ABN: 89083681823

Name: C & G Shoes

[Remove Business Appointment](#)

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.

Access to all online functionality (including future enhancements) for my business

[Select All](#) [Clear All](#)

	View	Prepare	Lodge	Revise
Business Details				
View business registration details	<input type="checkbox"/>			
Update business registration details	<input type="checkbox"/>			
Add / Update financial institution details	<input type="checkbox"/>			
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

[Cancel](#) [Save](#)

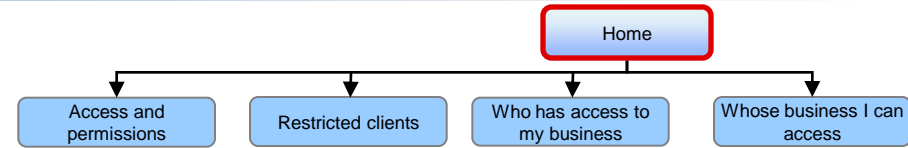
Select All / Clear All
You can select all permissions or clear all permissions by using these buttons.

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

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

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

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



! Step 1 - Select 'Who has access to my business'

Access Manager Links

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

External Links

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

Business: SHWETTA, VI TOAN B **ABN:** 11322827848 **Agent number:** Select number

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

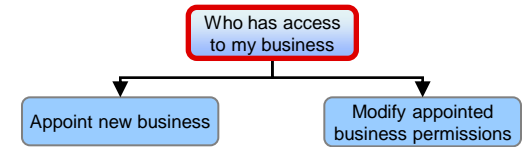
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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



Step 2 - Select the appointed business

Business details
This display's the details for the business.

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

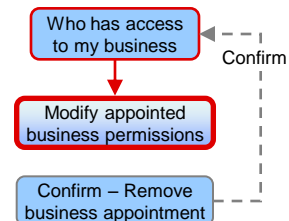
Appointed businesses
A list of business who you have previously appointed to be an agent for tax purposes.

ABN	Business name
11322827848	SHWETTA, VI TOAN B
33472013868	LAST SUPERANNUATION FUND

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

Step 3a – Modify appointed business permissions



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

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

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

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

Business: ABC Shoes **ABN:** 12345678901

You are here: [Home](#) » [Who has access to my business](#) » [Modify appointed business permissions](#)

Modify appointed business permissions

[Who has access to my business](#)

To modify the permissions assigned to the appointed business, select or de-select the checkboxes next to the appropriate permissions. The changes will be submitted when you select 'save'.

Business details

ABN: 89083681823
Name: C & G Shoes

[Remove Business Appointment](#)

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.

Access to all online functionality (including future enhancements) for my business

[Select All](#) [Clear All](#)

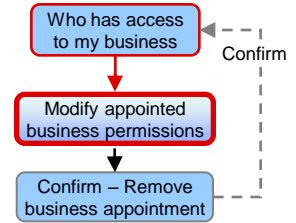
	View	Prepare	Lodge	Revise
Business Details				
View business registration details	<input type="checkbox"/>			
Update business registration details	<input type="checkbox"/>			
Add / Update financial institution details	<input type="checkbox"/>			
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

[Cancel](#) [Save](#)

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



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

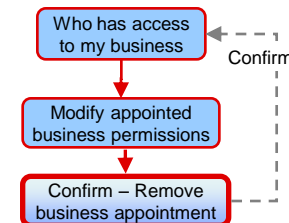


The screenshot shows the 'Access Manager' interface for 'Business: ABC Shoes' (ABN: 12345678901). The user is in the 'Modify appointed business permissions' section. The 'Remove Business Appointment' button is highlighted with a red box. Below this, the 'Business permissions' section is visible, showing a table of permissions with checkboxes for 'View', 'Prepare', 'Lodge', and 'Revise'.

	View	Prepare	Lodge	Revise
Business Details				
View business registration details	<input type="checkbox"/>			
Update business registration details	<input type="checkbox"/>			
Add / Update financial institution details	<input type="checkbox"/>			
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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

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



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

You are here: [Home](#) » [Who has access to my business](#) » [Modify appointed business permissions](#) » **Confirm - Remove business appointment**

Confirm - Remove business appointment

[< Modify appointed business permissions](#)

You have chosen to remove the appointment of this business as an agent for the tax affairs of your business. Please select "Confirm" to remove the business appointment.

Appointed business details

ABN: 33472013886

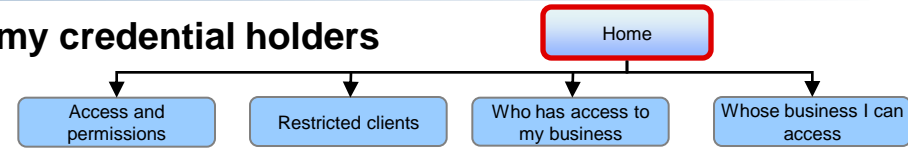
Name: LAST SUPERANNUATION FUND

Cancel
Cancels the action and takes user to 'Modify appointed business permissions' page with a process message.

Confirm
The business appointment is removed, takes user to 'Who has access to my business' with a process message.

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Scenario - Assign access to appointed business for my credential holders



! Step 1 - Select 'Whose business I can access' from the left hand menu

Australian Government
Australian Taxation Office

Accessibility [Icons]

Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout

Access Manager Links

- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business Appointments
- Who has access to my business
- Whose business I can access**
- External Links
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select number

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

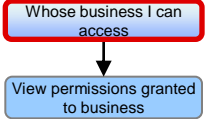
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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Scenario - Assign access to my credential holders for appointing business



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

Business details
This display's the details for the business.

Whose business I can access

You are here: [Home](#) » Whose business I can access

The list below shows the businesses that have appointed you to be an agent for their tax affairs. You can view details of the permissions that have been assigned to you by a particular business by selecting its ABN.

Appointing businesses

ABN: and/or Business name:

ABN ^	Business name
75883430899	BUCHANANE, ZIANG DONG F
36686547538	ASHZ UPHOLSTERERS

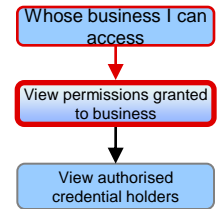
Business details
This display's the details for the business.

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

Appointing businesses
A list of business who have appointed your business to be an agent for tax purposes.

Facility to search with the ABN or the Business Name for businesses that have appointed your business as an agent for their tax affairs.

Scenario - Assign access to my credential holders for appointing business



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

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

You are here: [Home](#) > [Whose business I can access](#) > [View permissions granted to your business](#)

View permissions granted to your business

[Whose business I can access](#) > [View authorised credential holders](#)

Appointing business details

ABN: 12345678901

Name: ABC Shoes

Business permissions

This page lists the permissions that were granted to your business by the appointing business.

Access to all online functionality(including future enhancements) for this business

Business Details	
View business registration details	<input type="checkbox"/>
Update business registration details	<input type="checkbox"/>
Add / Update financial institution details	<input type="checkbox"/>
View account details	<input checked="" type="checkbox"/>
Submit refund request	<input checked="" type="checkbox"/>
Submit transfer request	<input checked="" type="checkbox"/>

ATO Transactions		View	Prepare	Lodge	Revise
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAYG payment summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-individual income tax return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

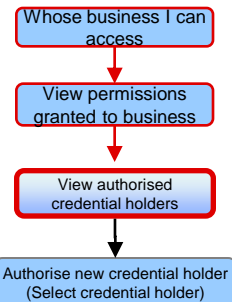
[Back](#)

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

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

Scenario - Assign access to my credential holders for appointing business

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



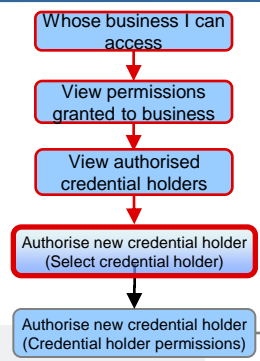
The screenshot shows the 'Access Manager' interface for a business named 'C & G Shoes' (ABN: 88083681823). The breadcrumb trail is: Home » Whose business I can access » View permissions granted to your business » View authorised credential holders. The main heading is 'View authorised credential holders'. A blue navigation bar contains links: '< View permissions granted to your business', 'Authorise new credential holder >', and '>'. Below this, a text block explains that the page lists credential holders with permissions for the appointing business. The 'Appointing business details' section shows ABN: 12345678901 and Name: ABC Shoes. The 'Authorised credential holders' section has search fields for Surname and Firstname, and a 'Search' button. A dropdown menu is open, showing 'Scott, Simon' with a blue dashed arrow pointing to it from a callout box. A 'Back' button is visible below the dropdown. A blue dashed box on the left contains a 'Back' button and text: 'Takes user to 'Whose business I can access' page.' The footer includes links for Privacy statement, Security, Technical information, and Copyright © Commonwealth of Australia 2011.

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

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

Scenario - Assign access to my credential holders for appointing business

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



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

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

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

Business: C & G Shoes ABN: 88083681823

You are here: [Home](#) » [Whose business I can access](#) » [View permissions to the appointing business](#) » [View Authorised Credential Holders](#) » **Authorise New Credential Holder**

Authorise new credential holder

[View authorised credential holders](#)

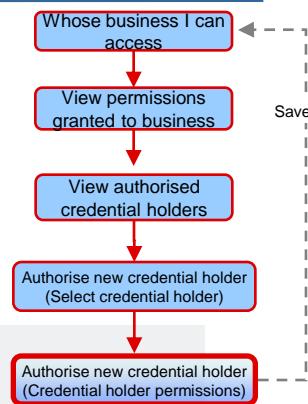
The following table contains a list of all credential holders from your business who are not authorised to access the appointing business. Select a credential holder's name to authorise their access to the appointing business and assign permissions.

Surname and/or Firstname

Name
Frynd, Ursula
Hen, Joe
Lee, David
Mye, Steve
Normal, Katy
Thor, Maeve
Umda, Jacki

Scenario - Assign access to my credential holders for appointing business

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



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

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

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

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

Business: C & G Shoes ABN: 88083681823

You are here: Home » Whose business I can access » View permissions to the appointing business » View Authorised Credential Holders » Authorise New Credential Holder - Select credential holder » Authorise new credential holder - Assign permissions

Authorise new credential holder - Assign permissions

[View authorised credential holders](#)

This page shows details of the appointing business and the credential holder you have authorised to access ATO online services for that business. You can also select what permissions the selected credential holder may have.

Appointing business details

ABN: 12345678901

Name: ABC Shoes

Credential holder details

Name: Mye, Steve

Credential holder permissions

To add a permission for this credential holder, please select the check boxes next to the appropriate permission. The changes will be submitted when you select 'save'.

	View	Prepare	Lodge	Revise
Business Details				
View account details	<input type="checkbox"/>			
Submit refund request	<input type="checkbox"/>			
Submit transfer request	<input type="checkbox"/>			
ATO Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FBT return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TFN declaration	<input type="checkbox"/>			
PAYG payment summary	<input type="checkbox"/>			
Non-individual income tax return	<input type="checkbox"/>	<input type="checkbox"/>		
SMSF annual return	<input type="checkbox"/>	<input type="checkbox"/>		

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



! Step 1 - Select 'Whose business I can access'

Australian Government
Australian Taxation Office

Access Manager

Accessibility [Icons]

Sitemap Contact us Help Logged in as: AM1TAPAdmin Request Logout

Business: SHWETTA, VI TOAN B ABN: 11322827848 Agent number: Select number

Access Manager Links

- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business Appointments
- Who has access to my business
- Whose business I can access**
- External Links
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

You are here: [Home](#) »

Welcome AM1TAPAdmin Request

Updates

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.

Quick Links

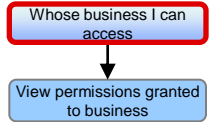
- [Copy Permissions](#)

What's new

The following new functional authorisations have been added.
Eg: Web services: View and Lodge Super forms

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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

The screenshot shows the 'Access Manager' interface. The header includes the Australian Government logo and 'Access Manager'. The breadcrumb trail is 'Home » Whose business I can access'. The main heading is 'Whose business I can access'. Below this is a search section for 'Appointing businesses' with fields for 'ABN' and 'Business name', and a 'Search' button. A table lists two businesses: 'BUCHANANE, ZIANG DONG F' (ABN 75883430899) and 'ASHZ UPHOLSTERERS' (ABN 36686547538). The second row is highlighted in yellow. A left sidebar contains 'Access Manager Links' and 'My business' sections. A top right navigation bar shows 'in as: Ray Maan Logout'.

Business details
This display's the details for the business.

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

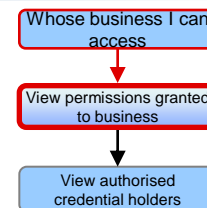
Appointing businesses
A list of business who have appointed your business to be an agent for tax purposes.

Facility to search with the ABN or the Business Name for businesses that have appointed your business as an agent for their tax affairs.

ABN ^	Business name
75883430899	BUCHANANE, ZIANG DONG F
36686547538	ASHZ UPHOLSTERERS

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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

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

You are here: [Home](#) > [Whose business I can access](#) > [View permissions granted to your business](#)

View permissions granted to your business

[Whose business I can access](#) > [View authorised credential holders](#)

Appointing business details

ABN: 12345678901

Name: ABC Shoes

Business permissions

This page lists the permissions that were granted to your business by the appointing business.

Access to all online functionality(including future enhancements) for this business

Business Details	
View business registration details	<input type="checkbox"/>
Update business registration details	<input type="checkbox"/>
Add / Update financial institution details	<input type="checkbox"/>
View account details	<input checked="" type="checkbox"/>
Submit refund request	<input checked="" type="checkbox"/>
Submit transfer request	<input checked="" type="checkbox"/>


ATO Transactions	View	Prepare	Lodge	Revise
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
PAYG payment summary		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Non-individual income tax return		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

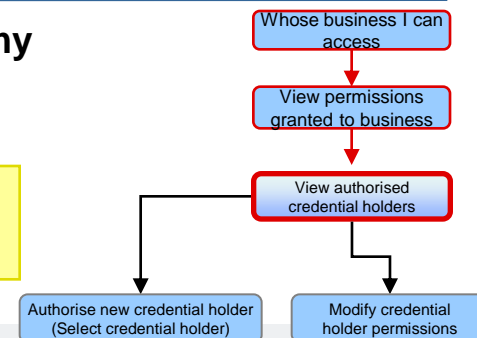
[Back](#)

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

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

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



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

You are here: [Home](#) » [Whose business I can access](#) » [View permissions granted to your business](#) » [View authorised credential holders](#)

View authorised credential holders

[View permissions granted to your business](#) [Authorise new credential holder](#)

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

Appointing business details

ABN: 12345678901
Name: ABC Shoes

Authorised credential holders

Surname and/or Firstname

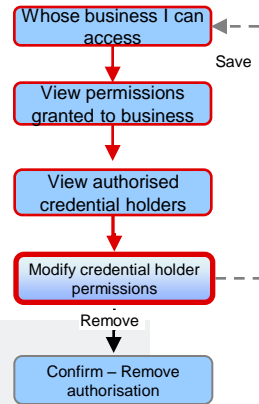
ABN	Business name
31322827842	SHWETTA, VI TOAN B
73472013860	LAST SUPERANNUATION FUND

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

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

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



Business: C & G Shoes ABN: 89083681823

You are here: Home » Whose business I can access » View permissions to the appointing business » View Authorised Credential Holders » Modify authorised credential holder permissions

Modify authorised credential holder permissions

[View authorised credential holders](#)

This page details the permissions assigned to the authorised credential holder from your business to access ATO online services for the appointing business

Appointing business details

ABN: 12345678901

Name: ABC Shoes

Credential holder details

Name: Scott, Simon

[Remove Authorisation](#)

Credential holder permissions

To modify the credential holder's permissions, select or de-select the check boxes next to the appropriate permissions. The changes will be submitted when you select 'save'

[Select All](#) [Clear All](#)

	View	Prepare	Lodge	Revise
Business Details				
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
TFN declaration	<input checked="" type="checkbox"/>			
PAYG payment summary	<input checked="" type="checkbox"/>			
Non-individual income tax return	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

[Cancel](#) [Save](#)

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

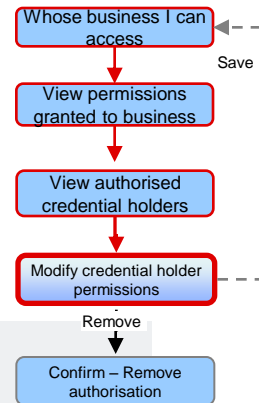
Permissions
Only the permissions allocated to the appointed business are displayed.
Modify the permissions you have assigned to the credential holder by checking or unchecking the checkboxes. The changes will take effect after you select 'save'

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

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

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'



Business: C & G Shoes ABN: 89083681823

You are here: Home » Whose business I can access » View permissions to the appointing business » View Authorised Credential Holders » Modify authorised credential holder permissions

Modify authorised credential holder permissions

[View authorised credential holders](#)

This page details the permissions assigned to the authorised credential holder from your business to access ATO online services for the appointing business

Appointing business details

ABN: 12345678901
Name: ABC Shoes

Credential holder details

Name: Scott, Simon

Remove Authorisation

Credential holder permissions

To modify the credential holder's permissions, select or de-select the check boxes next to the appropriate permissions. The changes will be submitted when you select 'save'

[Select All](#) [Clear All](#)

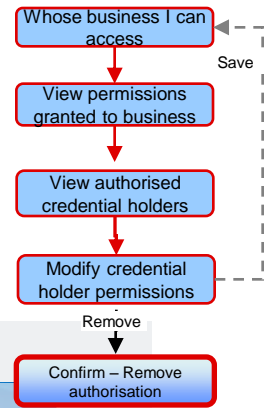
	View	Prepare	Lodge	Revise
Business Details				
View account details	<input checked="" type="checkbox"/>			
Submit refund request	<input checked="" type="checkbox"/>			
Submit transfer request	<input checked="" type="checkbox"/>			
ATO Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Activity Statements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBT return		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
TFN declaration		<input checked="" type="checkbox"/>		
PAYG payment summary		<input checked="" type="checkbox"/>		
Non-individual income tax return		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

[Cancel](#) [Save](#)

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

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

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



The screenshot shows the 'Access Manager' interface for business 'ASHZ UPHOLSTERERS' (ABN: 78886547538). The breadcrumb trail is: Home » Whose business I can access » View permissions to the appointing business » View Authorised Credential Holders » Modify authorised credential holder permissions » Confirm - Remove authorisation.

Confirm - Remove authorisation

Do you want to remove authorisation for this credential holder to access ATO online services for the appointing business? Select 'Confirm' to remove authorisation.

Credential Holder details

Name: Scott, Simon

Buttons: **Cancel** and **Confirm**

Cancel
Cancels any removing of the business appointment, takes user to 'Modify authorised credential holder permissions' page with a process message.

Confirm
Removes the specified credential holder's access to the appointing business, takes user to 'Who has access to my business' with a process message.