Manage agency

A guide to managing staff access, client list access security and staff mail subscriptions.

Introduction

Each intermediary has different access and security requirements. The **Manage agency** functions in the **Tax preparer** tab allow you to tailor your staff and client access controls.

Owners, administrators and restricted administrators can manage access roles and account permissions for the agencies own business accounts from the **Settings** menu.

Note: Administrators can only manage list permissions if they have been given access to the list themselves.

Access roles

What you can see in myIR differs depending on your access role.

Owner	Owners have full access to all accounts for the intermediary and can set up access for other parties. For Non-individuals the owner is director of a company, trustee of a trust, administrator or executor of an estate, or partner in a partnership. **Tax preparer tab**: they can access all intermediary functions.
Administrator	Administrators can only access the intermediary's own accounts the owner grants access to and can access the intermediary's customer-level mail. They can also create new restricted user, user and administrator logons. **Tax preparer tab**: they have similar access as an owner, but cannot see the Web logon activity report and can only manage client list security for lists they have been given access to.
Restricted administrator	Restricted administrators have the same access as administrators, except they cannot access the intermediary's customer-level mail. **Tax preparer tab**: they have the same access as an administrator.
User	Users can only access the intermediary's own accounts that an owner or administrator gives them access to. They cannot access the intermediary's customer-level mail. **Tax preparer tab**: they can perform all functions that relate to managing clients, and can only see transactional and return summary agency reports.
Restricted user	Restricted users are the same as users. **Tax preparer tab**: they can perform most functions that relate to clients, can only see transactional and return summary agency reports, cannot link or delink clients and for tax agents, they can't make financial transfers or deferred status requests.

To review the access role each staff member has, select **Manage staff logons** under the **I want to...** menu in **Manage agency**.

Home > **Manage my agency**		
Non-Individual	**Alerts**	**I want to...** More >
⊕ WE SORT YOUR TAX LIMITED 000-000-003	✓ There are no alerts	Manage staff logons >
Active logons: 4		Read user guide >
		Update key office holders >

This will take you to the **Settings – Manage additional logons** functions. This is where you can review your additional logons and what their current role is. You can also see their access to your agency's own business accounts.

Change their access role by selecting **Change**.

Select from the drop down box what access role you want to delegate to your staff and then save.

Client list account permissions

You can control who in your agency can access accounts linked to each client list. This allows you to stop employees from being able to bring clients on that list into their workspace, accessing them from the Tax preparer tab or running reports on them. **Note:** *PAYE intermediaries only have one client list.*

> **Example**
>
> We Sort Your Tax Limited has 2 client lists. List 1 is the general clients list, all staff have access to this. List 2 is a **private list**, it contains links to the director, their husband and family trust. The owner has set all their employees access to **None** for the private list to stop them from accessing and viewing the accounts.

You can also select what level of access someone has to all the client accounts linked to each client list. When they bring clients' accounts into their workspace or access them from the Tax preparer tab, the permissions you set will be applied, changing the functionality they might have.

> **Example**
>
> We Sort Your Tax Limited sets new employees' access level to **Read only** for accounts linked to the main client list. New employees can access any client from the Tax preparer tab, and bring any client linked to the main client list in and out of their workspace, but can only view those accounts.

All newly registered intermediaries and any new client list that is created will have the access level set to **None** at registration. The owner (or administrator) will need to review each list or logon and update the access level for each staff member.

Setting access

You can set your staff access by **list** or **logon**.

By list will display all your client lists, when you go into each one you'll see the full list of your web logons.

By logon lets you see all your web logons, when you go into each one you'll see the full list of client lists. You can select from one of the 4 options.

Full account access	You can do everything within an account, including updating a refund bank account and credit transfers within returns.
File	You can view everything, send mail, file returns and disclosures. If filing returns is not available for an account (for example, WFFTC), you'll only be able to view the account. You cannot request a credit transfer within a return or make any payments or refund bank account changes.
Read only	You can send secure mail and view account balances, transactions, filed returns, account-specific notices and letters.
None	You cannot do anything. If your account permission is set to **None** for a list of clients, all clients from this list will be removed from your workspace.

By list

To manage the client list permissions you will need to access each list separately through **List access** and edit the active logons.

The **Active logons** sections will display all your agency logons, their **Access role** and the current **Access permission** they have to clients linked to this list. To make changes select the **Edit** button.

To edit each logon's client list permission, you can either:

- select the access you would like to delegate
- use the **Reset to default access** button.

Note: If more than one of you is editing permissions on a list at any time, only the first saved changes will be applied. When the second person tries to save their changes, their data will be out of date.

Reset to default access

To bulk change all logons access within a particular list, you can use the **Reset to default access** button. This will change all access to whatever your list default is. To change your list default access to something else, cancel out of this screen to go back to the **Client list detail** and change it by using the **Default access for new logons** hyperlink.

Once all logons have been updated, you will need to confirm the changes you have selected. Saved changes will be applied immediately. If you change a logon's access to clients on a particular list to **None**, any clients in their workspace will be removed.

By list other features

When you are in each list the header information will show the client list ID and name, how many clients are linked to that list and how many account links you have for those clients. Here you can change the list name, address and set up a new **Default access** for any new logons you might create in the future.

Bookkeeper client list detail

Client list ID	: 109-2024	Number of clients on this list	: 4
Client list name	: Private list	Total accounts for clients	: 9
Default access for new logons	: None		

Default access for new logons

You can pick the default access for all new logons you create in the future. Setting a default access is optional, you can leave this as **None** and manually set access as new staff come in to your agency.

To change the default access, select the hyperlink and choose a new access level in the drop down box. This will not affect any existing logons, it only applies to any new logons.

List details tab

You can update your client list name and address here by clicking on each link.

Note: Tax agents can also update their bulk mailing address and see the bank account associated to their redirected refunds if one exists.

Logons | **List details**

Registration detail

List Name	Private list
Physical Address	55 FEATHERSTON STREET PIPITEA WELLINGTON 6011
Postal Address	Add

By logon

To manage the client list permissions you will need to access each logon separately through **Staff access** and edit the active client lists.

By list | **By logons**

Agency logons

Web logon	Name	Access role	
ABAdmin	Ally Admin	Administrator	Staff access
OMOwner	Simon Books	Owner	Staff access
RennyRest	Ren Restricted	Restricted User	Staff access
Uuuser	Eunice User	User	Staff access
4 Rows			

By logon other features

When you select the **Staff access** link from the **By logons** tab to go into a particular staff member you can view and edit their **Client mail subscriptions** as well as updating their client list permission.

Client mail subscriptions

Intermediaries can choose what linked client accounts they want to receive a notification email for when new letters are stored in the **Correspondence** tab in myIR. Each staff member can control their own subscription from **Settings** and owners and administrators can view and change everyone's preferences from here.

This works the same as **Settings** for each staff member. All available clients and accounts will display. Owners will see all clients and administrators will see clients linked to lists they have access to. Use the **Unsubscribed** link to change it to **Subscribed**. You can use the **Subscribe all** and **Unsubscribe all** buttons to apply a change to all the results on the page.

You can filter the results by names, IRD numbers or tax types. The **Subscribe all** and **Unsubscribe all** buttons will then apply the change to your filtered results.

> **Note:** Subscribing to mail for an account will send you a notification even if the letter was addressed to someone else. For example, a bookkeeper might subscribe to receive notifications for income tax but a tax agent is linked and has the mail redirected to them. The letter address on the PDF will show who the mail was intended for.

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- **Log in or register for myIR** - manage your tax and entitlements online.
- **Calculators and tools** - use our calculators, worksheets and tools, for example, to check your tax code, find filing and payment dates, calculate your student loan repayment.
- **Forms and guides** - download our forms and guides.

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