

Managing your workspace

A guide to moving linked client accounts in and out of your (or your employee's) workspace.

Introduction

Your personal workspace is the landing page you see in the **Tax preparer** section of myIR. If you have access to more than one IRD number you'll see a 'Customers' tab and an 'Accounts' tab. This guide covers how to gain access to client accounts that your agency is linked for.

Being linked to a client gives your agency the ability to access the client's accounts that you have authority to act for at any time. Adding a client to your workspace will allow you to easily view their details, file returns and take other actions. Each logon in your agency can manage their own individual workspace. It should only consist of the clients they need to work on day to day. You can put clients in and take them out as you need. Owners and administrators can add and remove clients from other agency employee's workspaces.

Displaying your tailored client selection means you now have:

- Quick access to the clients you work on. You won't need to enter an IRD number to access them.
- Client account balances that can be reordered by clicking on any of the column headers, making balances more visible.

The client workspace isn't designed for you to have every single client in it, unless you usually work on all of them.

Alternatives to having all clients in your workspace

To quickly access a client's details, type their IRD number into the **Client access** section of the **Tax preparer** tab and click **Access client**. This will allow you to access all the client's accounts that you are linked to and have permission to view. You will need to complete this process each time you want to access the client as they will not be permanently added to your workspace.

Client access

IRD number or customer identifier Client IRD number

[Access client](#)

Updating your workspace

You can remove clients and/or their accounts from your workspace at any time. Owners and administrators can also remove their own or other agency employee's workspaces.

Managing the clients in your workspace is a two-step process. The first step is to select what client(s) you want to add, edit or remove. We'll prepopulate the account(s) for you to select in the second step.

There are three different ways to select the clients for the first step.

What do you want to do?

Customer already in workspace - edit or remove

Add new customer to workspace

Both

[Reset your workspace >](#)

Owner/administrator only – when you select 'Manage workspace' you need to indicate if you're amending your own or someone else's workspace. Selecting 'someone else's' will display all the active logons for your agency to choose from.

Whose workspace do you want to manage?

my own

someone else's

Step one: Select clients

1. Customer already in workspace – edit or remove

Clients currently in the workspace you're managing will be prepopulated for you. Up to 25 clients will be displayed on each page. You can use the search box to enter the clients name or IRD number or you can go through the pages.

- Select up to 100 clients you want to make changes to.
- Once you have finished selecting clients go to the next screen.

2. Add new customer to workspace

Select clients - for agencies with 100 or fewer linked clients

We'll prepopulate all the clients you're linked to that you don't already have in your workspace.

- Place a tick for the clients you want to add accounts into the workspace for.
- Once you have finished selecting clients go to the next screen.

Select clients - for agencies with more than 100 linked clients

Due to the size of larger lists we're not able to prepopulate your entire client list. You'll need to add the clients you want to manage.

- Type or copy/paste the client's IRD number into the box and press enter - no hyphens are needed. Alternatively, you can select the 'Add client' button.
- You can add up to 100 clients (rows) at one time. The system will tell you once you have reached the maximum.
- Once you have finished selecting clients go to the next screen.

3. Both

Select clients - for agencies with 100 or fewer linked clients

We'll prepopulate all the clients you're linked to. The 'Status' column will show you whether you currently have any of their accounts in your workspace or not.

- Place a tick for the clients you want to add, edit or remove accounts for.
- Once you have finished selecting clients go to the next screen.

Select clients - for agencies with more than 100 linked clients

Due to the size of larger lists we're not able to prepopulate your entire client list. We'll prepopulate the clients already in the workspace you're managing.

- To add new clients:
 - Type or copy/paste the client's IRD number into the box and press enter - no hyphens are needed. Alternatively, you can select the 'Add client' button.
 - The client will be added to the end of the existing list with a tick in the 'Select' box.
- You can also select existing clients to edit or remove accounts.
 - Place a tick for the clients you want to edit.
- Select up to 100 clients you want to add or make changes to.
- Once you have finished selecting clients go to the next screen.

Step two: Select accounts for all three options

We'll prepopulate the linked accounts that the logon has access to for each of the clients you have selected. Each account will show whether it's currently in the workspace or not.

In	Out	Account type
Client, Johnny		
<input type="radio"/>	<input checked="" type="radio"/>	Income tax
<input type="radio"/>	<input checked="" type="radio"/>	Donation tax credit
<input type="radio"/>	<input checked="" type="radio"/>	Payroll

- You can select 'In' or 'Out' to move the account in or take the account out of the workspace.

- You can make bulk changes which will apply to all the clients on this page using the 'Bulk select' tool. Use the dropdown box to pick an account type or 'Select all'.

Bulk select

Bring all of an account type in or out of your workspace

- Donation tax credit
- FBT
- GST
- GST satisfaction of debt
- Income tax
- Payroll
- Resident withholding tax
- Select all

- Select whether you're bulk moving the accounts 'In' or 'Out'.

Bulk select

Bring all of an account type in or out of your workspace

- Once your changes have been selected go to the next screen and review your details. If you need to make changes to your request, select 'Previous'. Otherwise submit your request and your workspace will be updated.

Clearing or resetting your workspace

You can remove all clients from your workspace at any time by resetting your workspace. If you only want to remove some clients, follow the steps for 'Customer already in workspace - edit or remove' or 'Both'.

Owners and administrators can also clear other agency employee's workspaces.

What do you want to do?

- Customer already in workspace - edit or remove
- Add new customer to workspace
- Both

[Reset your workspace >](#)

Select the 'Reset your workspace' link to go to the 'Clear workspace' request.

- The logon of the workspace you're in will display. Owners/administrators: If you're not in the correct workspace you'll need to cancel out of the request and go back into the 'Manage workspace' request to select a different logon's workspace.
- Tick the box to confirm and submit your request.

Please confirm you want to clear this workspace.

Depending on how large the workspace was, it might take a minute or so to update. You might need to refresh your screen to see the accounts or customers disappear.



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Go to our website for information and to use our services and tools.

- 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.

Forgotten your user ID or password?

Request these online from the myIR login screen and we'll send them to the email address we hold for you.

FREE ADVISORY SERVICE

Our community compliance officers run free tax seminars and workshops for new businesses and organisations. For more information or to register to attend one of these sessions go to ird.govt.nz/seminars or phone 0800 377 774.

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