

Linking clients - tax agents

This factsheet explains how to link clients and transfer them between your client lists.

When you have authority to act on a client's behalf, you'll need to link to them to access their account information. This will also let you access their information in myIR.

To get to the **Link a new client** service:

1. Log in to myIR.
2. Go to the **Intermediary centre**.
3. Select **Client maintenance**.
4. Select **Link a new client**.

Customers can have more than 1 intermediary acting on their behalf. However, they cannot have more than 1 intermediary of the same type linked to the same account at any time. For example, a client can have a tax agent, bookkeeper and other representative linked to income tax at the same time. A client cannot have a tax agent and 2 bookkeepers linked to income tax at the same time.

Using this service to link to a client's account where the same intermediary type is already linked, will override the current link.

If you are linking accounts for a current client of yours, only the accounts that are not already linked will show.

If your client wants more than 1 intermediary of the same type linked to the same account, the intermediary who is not filing the returns will need to be set up as a nominated person.

Client lists

If you have multiple client lists, you need to choose which list you're adding your client to.

New client information

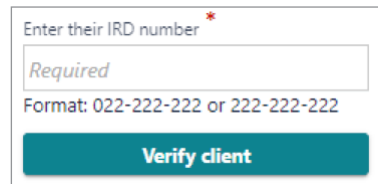
You need to verify your client and declare you have authority to act on their behalf before you link to their accounts.

1. Choose if you're linking a client with an IRD number or customer identifier.



ID type
IRD number

2. Enter your client's number.



Enter their IRD number *

Required

Format: 022-222-222 or 222-222-222

Verify client

3. Select **Verify client** to confirm it's the correct client.
4. Declare if you have authority to act on this client's behalf.

Note: Some overseas-based clients will be issued a customer identifier instead of an IRD number.

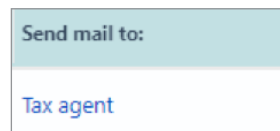
Creating client links

All social policy and tax accounts your client is registered for are listed under **Account level links**. This includes any other branches or locations your client may have. It will also show if they are already linked to another intermediary.

1. Select the accounts you want to link to.

| Select | Account ID | Account type | Linked to an intermediary |
|--------------------------|--------------------|--------------|---------------------------|
| <input type="checkbox"/> | 111-111-111-INC003 | Income tax | No |
| <input type="checkbox"/> | 111-111-111-EMP003 | Payroll | No |

2. Choose to have mail sent to you or the client for each account. Use the hyperlink to change who mail will be sent to.



Send mail to:

Tax agent

- If you'd like client's refunds deposited into your bank account, you can set up a disbursement account to have client refunds redirected to. You need to talk to your account manager to have a 'disbursements' account set up. This works just like redirecting mail from client to tax agent. You must have your client's written permission to redirect their refunds as part of your authority to act. If you have this set up you will be given the option to 'Send refunds to:' Tax agent or client when you link.

If the client is already linked to an intermediary of the same type, using this service will delink and replace them.

Customer master link

This new link type controls whether you are authorised to receive mail that is issued at the 'Customer level' rather than the 'Account (tax type) level'. Customer level mail includes instalment arrangement letters or summary of accounts where multiple accounts are combined. You may not be linked for all the account types that are covered in a Customer level letter, so make sure you check the wording of your authority to act.

Only 1 tax agent can hold the 'Customer master' link for a customer. It will display whether an existing tax agent is already linked with the Customer master link. You do not need the Customer master link to set up instalment arrangements, but you do need it to change the clients Customer level address (across all accounts), to indicate a company or trust is inactive and to be able to see audit letters.

| Select | Link type | Linked to an intermediary | Customer mail |
|-------------------------------------|-----------------|---------------------------|---------------|
| <input checked="" type="checkbox"/> | Customer master | Yes | Tax agent |

Example

ABC Accounts Ltd is a large firm who specialise in large income tax accounts. They prepare the annual returns for John Smith.

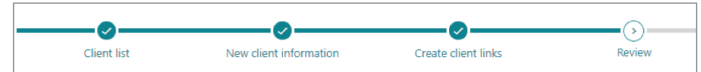
However, John Smith also uses a smaller firm XYZ Taxes Ltd to complete payroll and GST.

ABC Accounts Ltd are linked for income tax and related accounts and have the customer master link. XYZ Taxes Ltd are only linked for GST and PAY and related accounts.

Note: Only select this link if your authority to act for this client allows you to act for all tax types.

Review

Review your changes and submit them when everything is correct. You can view previous pages by using the breadcrumbs at the top of the screen.



Once submitted, you'll get confirmation we've received your request.

After you've linked your client

Once the client is linked you will be able to search for them, subscribe to receive alerts in your Intermediary centre or add them to your favourites to view their details. To add a client to your favourites you will need to be subscribed to them or you will need to have accessed their account. If you haven't accessed their account since logging in you will need to search for them, access their account and then go back to the **Favourites tab > Manage favourites**, find them on the list and click on the star beside their name. The client will then be displayed on your Favourites tab for quick access.

You can also use the Search feature from the log in page within myIR to view their details.

Transferring clients between client lists

To transfer a client between client lists, follow the same process as if you're linking to a new client.

When you transfer clients between lists, it will appear as a delink on the old list, and a link on the new list on the **Agency activity** reports. We will not send any notification of this activity to your client unless you add new account links that were not previously linked.



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