



myIR access for Bookkeepers

	Owner	Admin	Restricted admin	User	Restricted user
Home					
Search – Customer identifier/IRD number/name	✓	✓	✓	✓	✓
Favourites	✓	✓	✓	✓	✓
History	✓	✓	✓	✓	✓
My activity					
Search submissions	✓	✓	✓	✓	✓
Communicating with IR					
View messages	✓	✓	✓	✓	✓
View letters	✓	✓	✓	✓	✓
My business					
Agency reports	✓	✓	✓	✓	✓
Client list report	✓	✓	✓	✗	✗
Agency activity report	✓	✓	✓	✗	✗
Web logon activity report	✓	✗	✗	✗	✗
All client transactions	✓	✓	✓	✓	✓
GST return summary report	✓	✓	✓	✓	✓
PAYE return summary report	✓	✓	✓	✓	✓
Manage agency	✓	✓	✓	✗	✗
Update key office holders	✓	✓	✓	✗	✗
My clients					
Client maintenance	✓	✓	✓	✓	✗
Link a new client to your agency	✓	✓	✓	✓	✗
Delink or manage links	✓	✓	✓	✓	✗
All client mail	✓	✓	✓	✓*	✗
All client messages	✓	✓	✓	✗	✗
Manage payment and returns	✓	✓	✓	✓	✓
Manage client subscriptions	✓	✓	✓	✓	✓
Submit a short-process ruling	✓	✓	✓	✓	✓
Client registration	✓	✓	✓	✓	✗
Register client for a new tax account	✓	✓	✓	✓	✗
Register a client for unclaimed monies	✓	✓	✓	✓	✗
Register a client for donation tax credit	✓	✓	✓	✓	✗
Register client as a NZ foreign trust	✓	✓	✓	✓	✗
Register a client for income equalisation	✓	✓	✓	✓	✗
Register a client for R&D tax incentive	✓	✓	✓	✓	✗
Register a client for Working for Families	✓	✓	✓	✓	✗
Donation tax credits claim	✓	✓	✓	✓	✓
Payroll					
Client employee details	✓	✓	✓	✓	✓
Employer information schedule	✓	✓	✓	✓	✓
Amend employment information	✓	✓	✓	✓	✓
Employer monthly schedules	✓	✓	✓	✓	✓
Amend employer schedules	✓	✓	✓	✓	✓

* User access to all client mail is limited to viewing the letter list only. Users cannot open letter PDFs or export the letters

Restricted administrator access

If you're a Restricted administrator, you have access to all the features and functions of an Administrator, except you cannot view any customer level mail issued for the Bookkeeper's own tax affairs. This does not affect account level mail for accounts you have been given specific access to. For example, a Restricted administrator who has been delegated access to the Bookkeepers GST account.

Registering a new account

If you register a client for a new account from the Intermediary centre, the client will be linked to you at the same time.

Bookkeepers vs Tax agents

Unlike Tax agents, Bookkeepers will not be able to:

- view anything in relation to extension of time for income tax
- add a Customer master link (so no access to customer level mail or information)
- use the Financial transfers facility or access the transfer credit calculator
- redirect client mail or refunds.