Registered other representative

	Owner	Admin	Restricted admin	User	Restricted user
Home					
Favourites	Yes	Yes	Yes	Yes	Yes
Search - IRD number/Customer identifer/Name	Yes	Yes	Yes	Yes	Yes
History	Yes	Yes	Yes	Yes	Yes
My activity					
Search submissions	Yes	Yes	Yes	Yes	Yes
Communicating with IR					
View messages	Yes	Yes	Yes	Yes	Yes
View letters	Yes	Yes	Yes	Yes	Yes
My business					
Agency reports	Yes	Yes	Yes	Yes	Yes
Client list report	Yes	Yes	Yes	No	No
Agency activity report	Yes	Yes	Yes	No	No
Web logon activity report	Yes	No	No	No	No
All client transactions	Yes	Yes	Yes	Yes	Yes
GST return summary report	Yes	Yes	Yes	Yes	Yes
PAYE return summary report	Yes	Yes	Yes	Yes	Yes
Manage agency	Yes	Yes	Yes	No	No
Update key office holders	Yes	Yes	Yes	No	No
My clients					
Client maintenance	Yes	Yes	Yes	Yes	No
Link a new client to your agency	Yes	Yes	Yes	Yes	No
Delink or manage clients	Yes	Yes	Yes	Yes	No
All client mail	Yes	Yes	Yes	Yes*	No
Manage Subscriptions	Yes	Yes	Yes	Yes	Yes
Submit a short-process ruling	Yes	Yes	Yes	Yes	No
Client registration	Yes	Yes	Yes	Yes	No
Register client for new tax account	Yes	Yes	Yes	Yes	No
Register client for donations tax credits	Yes	Yes	Yes	Yes	No
Register client for unclaimed monies	Yes	Yes	Yes	Yes	No
Register client as a NZ foreign trust	Yes	Yes	Yes	Yes	No
Register client for Income Equalisation	Yes	Yes	Yes	Yes	No
Register client for R&D Tax Incentive	Yes	Yes	Yes	Yes	No
Register client for working for families	Yes	Yes	Yes	Yes	No
Donation tax credits claim	Yes	Yes	Yes	Yes	No
Payroll					
Client employee details	Yes	Yes	Yes	Yes	Yes
Employer information schedule	Yes	Yes	Yes	Yes	Yes
Amend employment information	Yes	Yes	Yes	Yes	Yes
Employer monthly schedule	Yes	Yes	Yes	Yes	Yes
Amend employer schedules	Yes	Yes	Yes	Yes	Yes
Single employer	Yes	Yes	Yes	Yes	Yes
Multiple employers					

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

Administrators vs Restricted administrators
Restricted administrators are able to access the same features and functionality avaliable to an Administrator.
But cannot view any customer level mail that has been issued for the agency's own tax affairs.
This will not affect access to account level mail that they have been given specific access to.
For example, a Restricted administrators who has been delegated access to the agency's GST account.

Other representatives cannot see anything relating to extension of time for income tax.

Other representatives cannot use Finanical transfers or the transfer credit calculator.

Other representatives do not get automatic access to clients once they've linked. Each client needs to approve their link request first. They cannot add a 'Customer master' link.

If an other representative uses any of the account registration forms under Client registration they will be be prompted to attach a copy of their authority to act so IR can link the accounts once they've been created.

Other representatives cannot redirect client mail, redirect client refunds or have a bulk mailing address.