



Linking clients - bookkeepers and PAYE intermediaries

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.

2. Enter your client's number.

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.

Select the accounts you want to link to.

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

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

After you've linked your client they'll get a letter or myIR correspondence to confirm you've linked and can now access their information.

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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