

# SOFTWARE ASSISTANT

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## ATO ACCESS MANAGER AND YOUR AUSKEY

### What's changed?

The ATO has changed the process of how an AUSkey is used for PLS (SBR) lodgment. As a result, Tax Professionals may be required to make changes to their AUSkey permissions to control access to ATO online services.

### When will I have to make these changes?

All users must make these changes **before** they attempt to lodge forms via PLS (when lodging via SBR). Failing to do so may result in rejection of tax forms when lodging via PLS.

**\*Note** The following process is not required when lodging via the ELS gateway. However, we recommend all users adopt these new processes as soon as possible to avoid unnecessary downtime once ELS is de-commissioned.

### Why are we changing from the current system?

Tax Assistant has moved towards PLS, providing a digital way of interacting with the ATO. This is part of an initiative to simplify the process of engaging with multiple government agencies; one of which being the ATO.



# How do I make these changes?

Login to Access Manager via <https://am.ato.gov.au/>



## Welcome to Access Manager

Access Manager allows you to control access by your staff to ATO online services for your business.

The functions of Access Manager are described in [Using Access Manager](#) and the [Sitemap](#). If you require further assistance please [Contact Us](#).

For scheduled downtime and details of issues currently affecting Access Manager, visit [System maintenance and issues](#).

## Accessing Access Manager

To log into Access Manager, you need an AUSKey. This is an important security measure and your key to our online services.

To register, visit [abr.gov.au/AUSkey](http://abr.gov.au/AUSkey).

Vision impaired users can navigate to the [Accessibility](#) page for assistance with using this site.

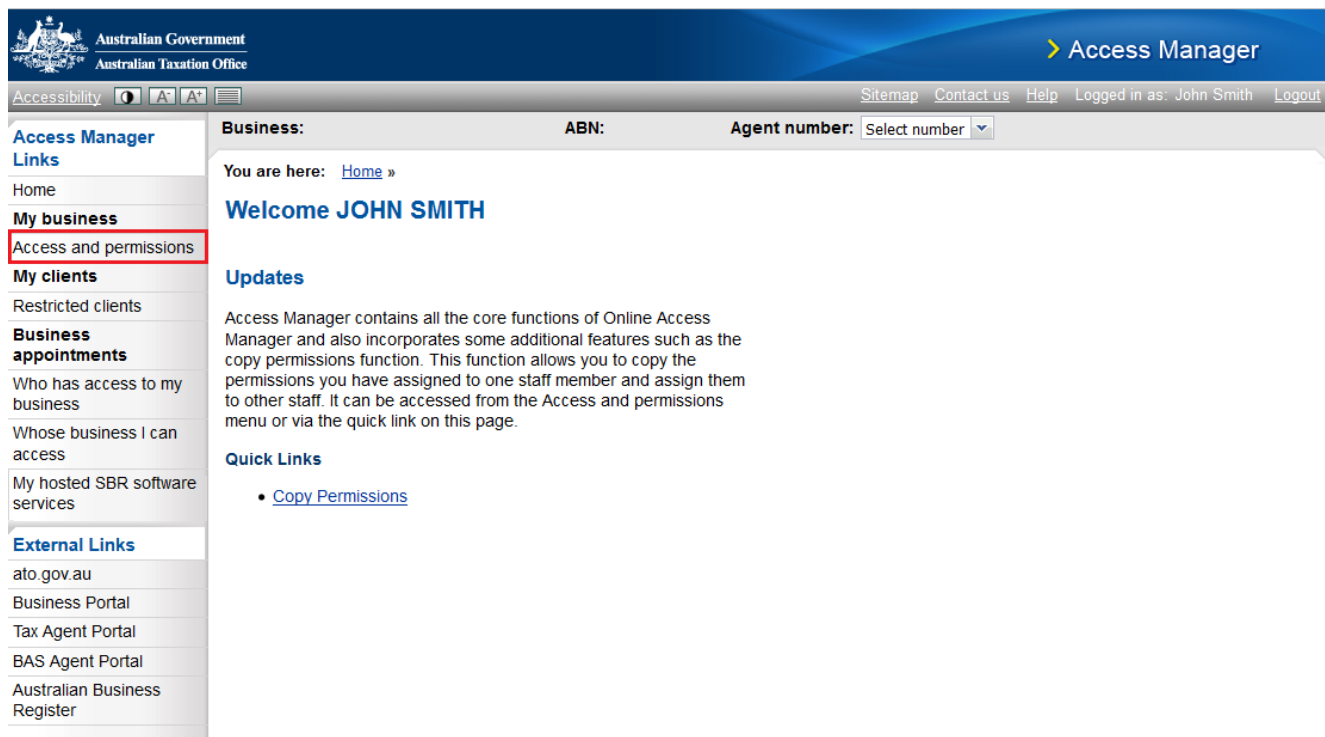
## Logging of Access Manager access

For statistical purposes, we record your login details and the date and time you logged into Access Manager.



\*Note If you are having trouble logging in to Access Manager, see the following:  
<https://abr.gov.au/AUSkey/Help-and-support/Setting-up-AUSkey-troubleshooting/>

Select Access and permissions from the left hand navigator



You may have more than one active AUSKey shown in the list. Select your current AUSKey by clicking on the underlined name. This will let you set AUSKey user permissions.

Australian Government  
Australian Taxation Office

Access Manager

Accessibility Sitemap Contact us Help Logged in as: John Smith Logout

**Access Manager Links**

- Home
- My business**
- Access and permissions
- My clients**
- Restricted clients
- Business appointments**
- Who has access to my business
- Whose business I can access
- My hosted SBR software services

**External Links**

- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

**Business:** ABN: Agent number:

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**Access and permissions**

[Home](#) [Past credential holders history](#) > [Current credential holder access report for all agent numbers](#) > [Copy permissions](#) > [Tax practitioner access](#) >

The following table contains a list of all credential holders associated with the specified Agent number. Select a credential holder's name to view or modify their access and permissions.

**Name search**

Surname:  and/or First name:

Name	Credential level	Access administrator	Account status	Last accessed an online service	Last updated in AM
<u>SMITH, JOHN</u>	Administrator	Yes	Active	2016-Nov-28	2014-Oct-23

**TIPS**

You can make a selection from the Agent number drop down box which is located at the top centre of the screen to display users associated with that Agent number only.



<input type="button" value="View user permissions"/>	Credential level	Access administrator	Account status	Last accessed an online service	Last updated in AM
<u>SMITH, JOHN</u>	Administrator	Yes	Active	2016-Nov-28	2014-Oct-23



Ensure the Credential holder access is at Administrator level to make permission changes. The Account status should be set to Active.

The screenshot shows the 'Access Manager' interface for the Australian Government Australian Taxation Office. The page title is 'Access Manager'. The breadcrumb trail is 'Home » Access and permissions » Modify access and permissions'. The main heading is 'Modify access and permissions'. Below this, there is a tip: 'You can modify a user's access on this page using the radio button options below. To submit the changes, select 'Save''. The 'Credential holder access' form is highlighted with a red box and contains the following fields: Name: Smith, John; Credential level: Administrator; Access administrator:  No  Yes; Account status:  Active  Disabled. A 'Remove account' button is located below the form. To the right of the form is a 'TIPS' box with the following text: 'Disabling an account temporarily removes a credential holder's access to ATO online services. Removing a credential holder's account removes their access to ATO online services and removes the account from the Access and Permissions list. To restore a credential holder's account, use the Past credential holder's history function from the Access and Permissions page. Select link to view which permissions are available on specific applications.' Below the form is a 'Permissions' section with a tip: 'The business tab displays the permissions that can be assigned to a credential holder for your business and the client tab displays the permissions that can be assigned for clients. To modify a user's permissions, select or de-select the check boxes next to the appropriate permissions. Changes will be submitted when you select 'Save''. There are two tabs: 'Business' and 'Client'. A large red arrow points from the 'Credential holder access' form in the screenshot to the detailed view below.

## Credential holder access

<b>Name:</b>	Smith, John
<b>Credential level:</b>	Administrator
<b>Access administrator:</b>	<input type="radio"/> No <input checked="" type="radio"/> Yes
<b>Account status:</b>	<input checked="" type="radio"/> Active <input type="radio"/> Disabled
	<input type="button" value="Remove account"/>



Scroll down to the **Permissions** section and ensure the **Access to all online functionality** checkbox is **marked** to grant full access permission. The same should be repeated for both the **Client** and **Business** sections shown.

\*Note if multiple AUSKey are shown, apply the same access to each AUSKey.

## Permissions

- ▶ The business tab displays the permissions that can be assigned to a credential holder for your business and the client tab displays the permissions that can be assigned for your clients. To modify a user's permissions, select or de-select the check boxes next to the appropriate permissions. The changes will be submitted when you select 'Save'.

**Business** **Client**

Access to all online functionality (including future enhancements) for my clients

Select All Clear All

Ensure you scroll to the bottom of the page and Save your changes.

Private ruling application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quarterly TFN/ABN report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SMSF annual return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Super contribution report		<input checked="" type="checkbox"/>
Super ENCC and RENCC election form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Taxable payments annual report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TFN declaration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Administration</b>	<b>All</b>	<input checked="" type="checkbox"/>
View and action own mail	<input checked="" type="checkbox"/>	
Access other agent's mail	<input checked="" type="checkbox"/>	
Trust account details	<input checked="" type="checkbox"/>	
View agency reports	<input checked="" type="checkbox"/>	

Cancel **Save**

This completes the Access Manager permission changes.



## Contact us

For further information these AUSkey changes, please contact the Support Desk.

**Email:**

[supportanz@thomsonreuters.com](mailto:supportanz@thomsonreuters.com)

**TEL:**

1800 074 333

