

Adding or removing user functions for an intermediary – taxpayer company

Adding user functions to an intermediary

1. Login as user of taxpayer account (that invited the intermediary to lodge on their behalf)
2. Click on required account
3. Click on **Manage users** option
4. Click on the **Edit** button of the required intermediary as follows:

Intermediary

	ABN	Intermediary	Start Date	Status	Functions
Edit	112233445	TEST PTY LTD	22/02/2016	Invited	Submit periodic return, Amend periodic return, Submit annual return, Amend annual return, Banking details, Contact details, Manage Registration, Manage Grouping, Communications

5. Tick the required function/s as follows:

- Summary
- Manage users**
- Amend name
- Contact details
- Banking details
- Company Grouping
- Update Registration
- Returns
- Communications
- History
- View/Print Registration

Edit Intermediary

Intermediary Test Pty Ltd

Function	Start date	End date
<input checked="" type="checkbox"/> Submit periodic return ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Amend periodic return ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Submit annual return ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Amend annual return ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Banking details ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Contact details ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> View history ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Manage Registration ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Manage Grouping ⓘ	17/12/2015 ⓘ	<input type="text"/>
<input checked="" type="checkbox"/> Communications ⓘ	17/12/2015 ⓘ	<input type="text"/>

[Update](#) [Remove intermediary](#)

6. Click on the **Update** button
7. Login as manager user of intermediary to view that functions have been added
8. The manager of the intermediary will then be able to allocate the new functions to the intermediary's users

Removing user functions from an intermediary

1. Login as a user of the taxpayer account (that invited the intermediary to lodge on their behalf)

2. Click on the intermediary
3. Click on required account as follows:

Accounts

1234567 - Payroll Tax: EXAMPLE PTY LTD

4. Click on **Edit** button of the required user as follows:

Manage Users

	User	Email	Start date	Suspended	Functions
<input type="button" value="Edit"/>	Nicole O'Brien	nicole.obrien@treasury.tas.gov.au			
<input type="button" value="Edit"/>	Nicole O'Brien	nicole.obrien@treasury.tas.gov.au			

5. Untick the required function/s to remove
6. Click on the **Update** button as follows:

Edit User: Fred Example

Suspended

Function	Start date	End date
<input type="checkbox"/> Submit periodic return ?	17/12/2015 *	
<input type="checkbox"/> Amend periodic return ?	17/12/2015 *	
<input type="checkbox"/> Submit annual return ?	17/12/2015 *	
<input checked="" type="checkbox"/> Amend annual return ?	17/12/2015 *	
<input checked="" type="checkbox"/> Banking details ?	17/12/2015 *	
<input checked="" type="checkbox"/> Contact details ?	17/12/2015 *	
<input checked="" type="checkbox"/> View history ?	17/12/2015 *	
<input checked="" type="checkbox"/> Manage Registration ?	17/12/2015 *	
<input checked="" type="checkbox"/> Manage Grouping ?	17/12/2015 *	
<input type="checkbox"/> Communications ?	17/12/2015 *	

7. Functions removed will also be automatically removed from the users of the intermediary