Access Manager permissions

How to manage which ATO online services and functions others can access.

Assign and manage permissions

How to assign and manage permissions for our online services.

Permissions for business and tax professionals

Access Manager permissions that apply to business and tax professionals and the online service they provide access to.

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Access Manager permissions that apply to super funds and services and the online service they provide access to.

Permissions for government partner agencies

Access Manager permissions that apply to government partner agencies and the online service they provide access to.

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Assign and manage permissions

How to assign and manage permissions for our online services.

Last updated 22 July 2024

On this page

Assign access and permissions

To assign permissions to authorised users:

1. Select **Manage permissions**.
2. Select the user.
3. Select the relevant permissions or **Select all** and **Clear all** buttons above the list.
4. Select **Save**.

Copy permissions

To copy permissions from one user to another:

1. Select **Manage permissions**.
2. Select **Copy permissions**.
3. Select the user from the drop-down menu that you want to copy the permissions for. Don't copy permissions from an authorised user with full access, as this may cause an error.
4. Select the user that you want to copy the permissions to (you can select one or multiple users).
5. Select **Save**.

View Access history report

The Access history report includes the date and time the user logged in to an online service. You can view one or all authorised users' accesses.

For registered agents, the report also lists the clients who have been accessed.

To view the Access history report:

1. Select **Manage permissions**.
2. Select either
   a. the user (for one user) then **Access history report**
   b. **Access history report – all users** (for all users).
3. Type the date and time range - This can be up to 2 years, with the start date no longer than 2 years and 3 months from the current date.
4. Select **Search** - Results will appear for up to 5,000 records.
5. Select **Export** to download the report as a CSV file

QC 73214

Permissions for business and tax professionals

Access Manager permissions that apply to business and tax professionals and the online service they provide access to.

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On this page

Who permissions apply to

The permissions in the following table apply to:

- business – the business itself
- business to business – a business acting on behalf of another business using the business appointment's function
- registered tax and BAS agents with a client in focus.

Accounts and payments

Table 1: Category – accounts and payments

Activity or form	Permissions required	Transaction	Online services
Account summary	Account details	View	OSB OSFA
Tax accounts	Account details	View	OSB OSFA
Superfund Administration Account	SoA	View	OSB OSFA

Refunds	Refund request Action own mail	Add/Update	OSB OSFA	
Transfer requests	Transfer request Action own mail	Add/Update	OSB OSFA	
Payments	Account details Make payments Financial and payment details	View Add/Update Add/Update	OSB OSFA* SBR	
Payment arrangements	Payment plans Account details Make payments	Add/Update	OSB OSFA SBR	

Lodgment

Table 2: Category – lodgment

Activity or form	Permissions required	Transaction	Online services
Activity statements	Activity statement	View Prepare	OSB OSFA

	Registration Account details	Lodge Revise View	SBR
Annual Investment Income Report	Annual Investment Income Report	Prepare Lodge	OSB OSFA SBR
Attribution managed investment trust return	Attribution managed investment trust return	Prepare Lodge	SBR
Certificate of Coverage request	Certificate of Coverage request	View Prepare Lodge Revise	OSB OSFA SBR
Closely held trust beneficiary reports Includes TFN Report and TFN Withholding report	Closely held trust beneficiary reports	Prepare Lodge	SBR
Common Reporting Standard (CRS) statement	Common Reporting Standard (CRS) statement	Prepare Lodge	OSB OSFA SBR
Community Housing Annual Report	Community Housing Annual Report	Prepare Lodge	OSB
Consolidated group notification	Consolidated group notification	Prepare Lodge	SBR

Country by Country Report	Country by Country Report	Prepare Lodge	OSB OSFA SBR
Direct Debit	Direct Debit	Prepare Lodge	SBR
Early stage innovation company report	Early stage innovation company report	Prepare Lodge	OSB OSFA
Electronic Payments systems transaction report	Electronic Payments systems transaction report	Prepare Lodge	OSB OSFA
Electronic Portability Form	Electronic Portability Form	View	OSFA
Employee Commencement form	Employee Commencement form	View Prepare Lodge	OSB OSFA SBR
Employee Share Scheme annual report	Employee Share Scheme annual report	Prepare Lodge	OSB OSFA
Excise Claim	Excise forms	View Prepare Lodge Revise	OSB OSFA
Excise Duty Return	Excise forms	View Prepare Lodge Revise	OSB OSFA

FBT Return	FBT Return	Prepare Lodge	SBR
Foreign Account Tax Compliance Act (FATCA)	Foreign Account Tax Compliance Act (FATCA)	Prepare Lodge	OSB SBR OSFA
Fuel tax credits non-business (FTCN)	Excise forms Financial and payment details	View Prepare Lodge Add/Update	OSB OSFA
Further information	Objection and private ruling applications View and action own mail	Prepare Lodge View	OSB OSFA
General Purpose Financial statements	General Purpose Financial statements	Prepare Lodge	OSB OSFA
GST Property credits	Accounts	View	OSB OSFA
Income tax history and copy of return	Account	View	OSB
Lodgment deferrals	Registration View and action own mail	Add/update	OSFA
Merchants Point of Sale transactions reporting	Merchants point of sale transactions reporting	View Prepare Lodge	OSB OSFA
Non-Individual income tax	Non-Individual income tax	Prepare	SBR

return	return	Lodge	
Objection and Private Ruling	Objection and private ruling applications View and action own mail	Prepare Lodge View	OSB OSFA
PAYG Payment Summary	PAYG Payment Summary	Prepare Lodge	SBR
Petroleum Stewardship for Oil (PSO) claim	Excise Forms Financial and payment details	View Prepare Lodge Add/Update	OSB OSFA
Private Health Insurance Report	Private Health Insurance Report	Prepare Lodge	OSB OSFA
Reported Transactions	Accounts	View	OSB OSFA
Statement of Tax	Account	View	OSB OSFA
Taxable Payment Annual Report	Taxable Payment Annual Report	Prepare Lodge	OSB OSFA
Transfer balance Account Report	Transfer balance Account Report	Prepare Lodge	OSB OSFA SBR
TFN declaration	TFN declaration	Prepare Lodge	OSB OSFA

			SBR
Transfer of shares and units	Transfer of shares and units	Prepare Lodge	OSB OSFA

Manage employees

Table 3: Category – manage employees

Activity or form	Permissions required	Transaction	Online services	No
STP Reporting	Payroll event	View	OSB OSFA SBR	n/a
STP Deferrals and Exemptions	Payroll event	Lodge	OSB OSFA SBR	n/a
Small Business Super Clearing House. Note: This service will be closed from 1 July 2026.	Small Business Super Clearing House	View Lodge	OSB OSFA SBSCH	n/a
COVID-19	Registrations Financial and payment details	View Lodge Add/Update	OSB OSFA	n/a

Communication

Table 4: Category – communication

Activity or form	Permissions required	Transaction	Online services	
Secure Mail	View and action own mail	View	OSB OSFA	
Secure Mail Admin access	Access other users mail	View	OSB OSFA	
History	Communication history	View	OSB OSFA	
Preferences	Registration	View	OSB	
Your dealings	n/a	Default view	OSB OSFA	

Profile

Table 5: Category – profile

Activity or form	Permissions required	Transaction	Online services	Nc
Business details	Registration	View Add/Update	OSB OSFA ABR	n/a
Business addresses	Registration	View Add/Update	OSB OSFA	n/a
Email addresses	Registration	View Add/Update	OSB OSFA	n/a

Authorised contacts	Registration	View Add/Update	OSB OSFA	n/a
Agent	Registration	View	OSB	n/a
Associates	Registration	View	OSB OSFA ABR	n/a
Financial institution details	Registration Financial and payment details	View Add/Update	OSB OSFA SBR	n/a
Manage card details	Financial and payment details	Add/Update	OSB	n/a
Tax registration	Tax roles	View Add/Update	OSB OSFA ABR	n/a

Tax practice administration

The permissions in the table below are available if an ABN is associated with a registered agent number (RAN). Access can be granted to:

- the client – give users access to your clients as a registered agent
- a RAN – only applies to users who have been given access to the RAN within Access Manager
- restricted clients – clients can be set as restricted clients in Access Manager and only users with permission to access a restricted client or all restricted clients can access these.

Table 6: Permissions for tax practice administration

Activity	Permissions	Transaction	Online	Not

or form	required		services	
Access to all restricted clients	Access to all restricted clients	None	OSFA SBR ABR	n/a
Trust account details	Trust account details	None	SBR	Inclu recc repc lodg perf repc
View Agent reports including usage reports	View Agent reports	None	SBR	This Usa repc
Client List – bulk download	Client List – bulk download	None	OSFA	n/a
Reports	Reports	View	OSFA SBR	Inclu clier repc clier lodg repc
Clients	Clients	View Add Update	OSFA SBR ABR	n/a

Permissions for superannuation services

Access Manager permissions that apply to super funds and services and the online service they provide access to.

Last updated 22 July 2024

The permissions in the table below apply to:

- Australian Prudential Regulation Authority (APRA) funds
- government non-regulated funds
- self-managed super funds (SMSFs)
- retirement savings account (RSA) providers
- exempt public sector superannuation schemes (EPSSS)
- life insurance providers (LIP).

Permissions also apply to businesses linked to, or tax agents representing these services.

Table 7: Permissions for superannuation services

Activity or form	Permissions required	Transaction	Onl ser
EmployerTICK	Employer TFN integrity check	Validate	SBF
Self-Managed Superfund search and verify members	SMSF – Search and verify members	Verify	SBF

Self-Managed Superfund verification service	SMSF – Verification service for rollovers/contributions	Verify	SBF
Superstream FVS FIA template	Super products – List	View	SBF
Superstream FVS	Super products details – View	View	SBF
Superstream FVS	Super products details – Lodge	Lodge	SBF
Superstream SuperTICK	Super – TFN integrity check (SuperTICK)	View Validate	SBF

Superstream MATS	Super – Member information service (View)	View	SBI
Superstream MAAS	Super – Member account services (View)	View	SBI
Superstream MAAS	Super – Member account services (Lodge and update)	Lodge and Update	SBI
Superstream SMAT access	SuperMatch 2 Initiate ATO monies Transfer	View Update	SBI
Superstream	SuperMatch2 Retrieve super details	View	SBI
SMSF Annual Return	SMSF Annual Return	Prepare Lodge	SBI
Super Guarantee Charge Statement	Super Guarantee Charge Statement	Prepare Lodge	OSI OSI
Super Compassionate Release of superannuation	Super Compassionate Release of superannuation	View	OSI OSI
Superannuation Contribution report	n/a	n/a	n/a
Member Contribution	Member Contribution Statement	Prepare	OSI

Statement		Lodge	
Audit Completion Advice	SMSF Auditor reporting	Prepare Lodge	OSI
Auditor Contravention Report	SMSF Auditor reporting	Prepare Lodge	OSI
Transfer balance Account Report	Transfer balance Account Report	Prepare Lodge	OSI OSI SBI

QC 73216

Permissions for government partner agencies

Access Manager permissions that apply to government partner agencies and the online service they provide access to.

Last updated 22 July 2024

The permissions in the following table are available to ABNs that we have set up in Access Manager with access to the phoenix watch list or as a:

- government partner agency
- state and territory government agency.

Table 8: Permissions for government partner agencies

Activity or form	Permissions required	Transaction	Online services	N
ABR API Agency	ABR API Agency	View	ABR	G
Partner Agency	Partner Agency	View	ABR	G
Partner Agency Search	Partner Agency Search	View	ABR	G
State and Territory government Agency	Gov.State Territory	View Lodge	OSB	G

QC 73217

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