Inland Revenue
Te Tari Taake

Registering as a Bookkeeper

The guide below shows the key differences between having token access, being a nominated person and registering as a bookkeeper.

New token access will be discontinued from the 26th April 2019.

Inland Revenue recognition	Token Access	NOP	Book Keeper
Recognised Intermediary			✓
Targeted messaging from Inland Revenue			✓
Opportunity to test Inland Revenue products and services			✓
Channel availability			
MyIR	✓	✓	✓
Phone		✓	✓
{LJ]HLw ăŜfŦ ăŜNJØλŎŜ fλyŜ			✓
Client on-boarding			
Signed engagement/authority letter	✓	✓	✓
Immediate client access			✓
Link customer initiated **Customer required to have myIR logon*	✓ *	✓	
Link intermediary initiated **Customer required to have myIR logon*	✓ *		✓
Client access			
Ability to control/personalise workspace**		✓	✓
Single myIR logon for all clients	✓	✓	✓
Quick access to clients not in workspace			✓
Manage myIR logons			
Control level of staff access to client accounts***			✓
Ability to set up staff workspace for them			✓
Tabs in myIR			
/dzăű2YŜNJ űl·ō	✓	✓	✓
!ŎŎ2dzyűă űl·ō	✓	✓	✓
¢l·È LJNJŜLJl·NJŜNJ			✓
{dzōYλűűŜŘ űl·ō	✓	✓	✓
/2NJNJŜăLJ2yŘŜyŎŜ tab	✓	✓	✓

Reporting	Token Access	NOP	Book Keeper
Client list report *Available to Owners and Administrators*			✓
Agency activity report *Available to Owners and Administrators*			✓
Web logon report *Available to Owners only*			✓
Client workspace report *Available to Owners and Administrators*			✓
PAYE & GST summary report	✓	✓	✓
Transactions reports *Can run report for transactions within each client account*	✓	✓	✓
Client registration			
Register client for new tax types	✓	✓	✓
Automatically linked to the new tax type			✓
Client return filing			
File returns for single client	✓	✓	✓
Reassess client returns	✓	✓	✓
Bulk file PAYE for multiple clients			✓
Client correspondence			
View client letters	✓	✓	✓
Receive notifications for client letters	✓	✓	✓
Tailor notifications to client letters			✓
Receive notifications for letters to tax agent			✓
Retrieve all client letters in bulk			✓
Send secure mail	✓	✓	✓
Client payments and refunds			
Pay by direct debit from own bank account	✓	✓	✓
Update refund bank accounts for clients	✓	✓	✓
Limit ability for staff to update bank accounts*			✓

ƒStaff can be set to 'File' which means they cannot change refund bank accounts
***You can choose to claim/not claim NOP links which is the equivalent of manage workspace*
****NOP access is controlled by the client and defaults to 'Full account access'*

Don't forget to print and save a copy of this document.

For more information, check out ird.govt.nz/bookkeepers