Australian Government
Australian Taxation Office

About Access Manager

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Assign and manage permissions

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Assign and manage permissions for our online services.

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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:

5. Select **Manage permissions**.
6. Select **Copy permissions**.
7. 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.
8. Select the user that you want to copy the permissions to (you can select one or multiple users).
9. Select **Save**.

Disable or change user access

To disable or change the status of an account:

10. Select the **Active** or **Disabled** button. If **Disabled** is selected, the user won't be able to log in to Access Manager or any of our online services. A disabled account can be reactivated by selecting the **Active** button

11. Select **Save**.

Remove user access

To remove a user's access:

12. Select **Manage permissions**.
13. Select the user then select **Remove account**. If removed, the user won't be able to log in to Access Manager or our online services. A removed account can be restored and made active.
14. Select **Confirm**.

Restore user access

To restore a user's access:

15. Select **Manage permissions**.
16. Select **Past credential holders history**.
17. Select **Restore** for the relevant user.
18. Select **Confirm**.
19. Select the restored user in the table page.
20. Select **Active** against the Account status.
21. Select **Save**.

View user past credentials

To view when a user was removed or restored:

22. Select **Manage permissions**.
23. Select **Past credential holders history**.
24. Select the user.
25. Select **Close**.

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:

26. Select **Manage permissions**.
27. Select either
    a. the user (for one user) then **Access history report**
    b. **Access history report – all users** (for all users).

28. Type the date and time range, then select **Search**.
29. Select **Export** to download the report as a CSV file.

View Update history report

The 'Update history report' shows when an authorisation was created. This report can only display information for a single user.

To view the Update history report:

30. Select **Manage permissions**.
31. Select the user.
32. Select **Update history report**.
33. Type the date and time range then select **Search**.
34. Select **Export** to download the report as a CSV file.

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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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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 Registration Account Details	View Prepare Lodge Revise View	OSB OSFA 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	Foreign Account Tax Compliance	Prepare	OSB

Act (FATCA)	Act (FATCA)	Lodge	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 return	Non-Individual income tax return	Prepare Lodge	SBR
Objection and Private Ruling	Objection and private ruling applications	Prepare Lodge	OSB OSFA

	View and action own mail	View	
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	N
STP Reporting	Payroll Event	View	OSB OSFA SBR	n/
STP Deferrals and Exemptions	Payroll Event	Lodge	OSB OSFA SBR	n/
Small Business Super Clearing House	Small Business Super Clearing House	View Lodge	OSB OSFA	n/
COVID-19	Registrations Financial and payment details	View Lodge Add/Update	OSB OSFA	n/

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	N
Business Details	Registration	View Add / Update	OSB OSFA ABR	n/
Business Addresses	Registration	View Add / Update	OSB OSFA	n/
Email addresses	Registration	View Add / Update	OSB OSFA	n/
Authorised contacts	Registration	View Add / Update	OSB OSFA	n/
Agent	Registration	View	OSB	n/

Associates	Registration	View	OSB OSFA ABR	n/
Financial Institution Details	Registration Financial and Payment Details	View Add/Update	OSB OSFA SBR	n/
Manage Card Details	Financial and Payment Details	Add/Update	OSB OSFA	n/
Tax Registration	Tax roles	View Add/Update	OSB OSFA ABR	n/

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 or form	Permissions required	Transaction	Online services	Not
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 reco repo lodg perf repo
View Agent reports including usage reports	View Agent reports	None	SBR	This Usa repo
Client List - bulk download	Client List - bulk download	None	OSFA	n/a
Reports	Reports	View	OSFA SBR	Inclu clier repo clier lodg repo
Clients	Clients	View Add Update	OSFA SBR ABR	n/a

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Permissions for superannuation services

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

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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 the services above.

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	Super products – List	View	SBF

FVS FIA template			
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	SBF
Superstream MAAS	Super – Member account services (View)	View	SBF
Superstream	Super – Member account services	Lodge and Update	SBF

MAAS	(Lodge and update)		
Superstream SMAT access	SuperMatch 2 Initiate ATO monies Transfer	View Update	SBF
Superstream	SuperMatch2 Retrieve super details	View	SBF
SMSF Annual Return	SMSF Annual Return	Prepare Lodge	SBF
Super Guarantee Charge Statement	Super Guarantee Charge Statement	Prepare Lodge	OSE OSF
Super Compassionate Release of superannuation	Super Compassionate Release of superannuation	View	OSE OSF
Superannuation Contribution report	n/a	n/a	n/a
Member Contribution Statement	Member Contribution Statement	Prepare Lodge	OSE
Audit Completion Advice	SMSF Auditor reporting	Prepare Lodge	OSE
Auditor Contravention Report	SMSF Auditor reporting	Prepare Lodge	OSE
Transfer balance Account Report	Transfer balance Account Report	Prepare Lodge	OSE OSF SBF

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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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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
ABR API Agency	ABRAPIAgency	View	ABR
Partner Agency	Partner Agency	View	ABR
Partner Agency Search	Partner Agency Search	View	ABR

State and Territory government Agency	Gov.State Territory	View Lodge	OSB	(

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