

### **Agent nomination process**

Thank you for engaging Andrews Partners to provide taxation services on your behalf.

We are writing to inform you about a new process introduced by the Australian Taxation Office (“ATO”) for nominating a registered agent with it.

This new process is called ‘**Client-to-agent linking**’ and, effective from 13 November 2023, it applies to all taxpayers with an Australian Business Number (ABN), excluding sole traders.

As a result of this change, you will need to take certain steps to authorise our office to act as your tax agent on your behalf, as explained further below.

### **Why has Client-to-agent linking been introduced, and when does it need to be completed?**

Registered agents have digital access to their clients' tax information and the functionality to lodge returns and forms through the ATO's online services. Client-to-agent linking was introduced to strengthen the security of these online services.

Client-to-agent linking also helps protect a client's information (e.g., from identity theft) by requiring them to securely nominate a registered agent using the ATO's online platform, *Online services for business*.

From 13 November 2023, this new nomination process must be completed by a client with an ABN (except a sole trader) if they are:

- engaging a new registered tax or BAS agent, or payroll service provider to represent them; or
- changing the authorisations given to an existing agent (for example, to start representing the client for a new obligation such as income tax, FBT, or to represent a new entity in the client group).

Once this process has been completed, the agent can connect to the client and access their information.

## What do you need to do?

You must complete the new process to nominate Andrews Partners as your authorised agent. This requires you to do the following:

### 1. **Nominate Andrews Partners as your registered agent in *Online services for business*** –

To do this, you will need to follow the client-to-agent linking steps outlined in the enclosed document from the ATO, which vary depending on whether or not you have already set up access for *Online services for business*.

In summary, this means:

#### **A. If you have already set up access to *Online services for business* and have an appropriately authorised myGovID:**

<b>Action Required</b>	<b>Instructions</b>
1. Log into <i>Online services for business</i>	Use your authorised myGovID to log in.
2. Nominate your authorised agent	From the home page: <ul style="list-style-type: none"><li>• select <b>Profile</b>, then <b>Agent details</b>;</li><li>• at <b>Agent nominations</b>, select <b>Add</b>;</li><li>• on the <i>Nominate agent screen</i>, go to <b>Search for agent</b> and search for us using either our RAN 72-173-000 Andrews Partners;</li><li>• complete the <b>Declaration</b> and select <b>Submit</b>;</li><li>• confirm that you can see our details listed under <b>Agent nominations</b>; and</li><li>• notify our office that these steps have been completed as soon as practicable</li></ul>

#### **B. If you have NOT set up access to *Online services for business* and do NOT have an appropriately authorised myGovID, before you follow the steps in the above table:**

<b>Action Required</b>	<b>Instructions</b>
1. Set up your myGovID	This is the Government's Digital Identity app and can be set up at <a href="http://www.mygovid.gov.au/setup">www.mygovid.gov.au/setup</a> It is advisable you establish a 'Strong' Identity strength to assist with subsequent steps.
2. Link your myGovID to the ABN	You will need to use the Government's <i>Relationship Authorisation Manager</i> ('RAM') to

	<p>link your myGovID to your ABN. This should generally be done <a href="#">online</a>.</p> <p>If this link does not work, copy and paste the following web address into your internet browser:  <i>info.authorisationmanager.gov.au/principal-authority#How_to_link</i></p>
3. Authorise others (optional)	This is an optional step if you wish others to act on behalf of your business.
4. Log into <i>Online services for business</i> and nominate your authorised agent	Follow the instructions in the table above.

The steps outlined in Table A or B (whichever applies) must be repeated by each individual or by an authorised person of each entity in your group wishing to nominate Andrews Partners to act as their authorised agent.

2. **Notify us of each nomination** – Once a nomination has been submitted with the ATO, please notify our reception at [info@andrewspartners.com.au](mailto:info@andrewspartners.com.au) or 02 9367-9500.

It is important that this is done as soon as the nomination process is completed for each individual or entity in your group, as the ATO does not provide agents with a direct notification of a nomination.

We then have 28 calendar days to add you and any other individuals and entities in your group as a client or to add additional tax accounts before a nomination expires. Should we need more time, we will request that the 'Extend' feature in *Online services for business* be used to add another 28 days to a nomination.

Unfortunately, we cannot complete this process on your behalf. However, we can help you in understanding what you need to do. For assistance, please contact our office on 02 9367-9500.

Alternatively, you can contact the **ATO** on **13 28 66** or visit [www.ato.gov.au/Business/Bus/Agent-nomination-process/](http://www.ato.gov.au/Business/Bus/Agent-nomination-process/) for more details.

Yours sincerely

The Team @ Andrews Partners