



## **Fair Tax Accountant Geelong**

### **Easy Steps to Linking with Your Tax Agent: A Business Owner's Guide in Australia**

#### **Introduction: Simplifying Your Tax Management with Fair Tax Accountant Geelong.**

Are you a new business owner looking to nominate an accountant or are you a business owner looking to change accountants?

While the process is straight forward, it's not as easy as it once was!

Previously, your new accountant would be able to add your business to their Tax Agent list as long as they had written authorisation. However, the ATO have now introduced Client-Agent Linking (CAL), meaning the authorisation must be given digitally by the business owner through the ATO's Online Services for businesses. CAL has been introduced for several reasons, primarily focusing on enhanced security and safeguarding privacy.

This step-by-step guide will help you seamlessly connect with your tax agent. Let's get started!

The nomination process is a 5-step process:

Step 1 – Setup your digital ID (myGovID)

Step 2 – Link your myGovID to your ABN via RAM

Step 3 – Log in to online services for business

Step 4 – Nominate your authorised agent in Online service for business

Step 5 – Let your agent know you have nominated them.

#### **Do you have access to Online services for business?**

**Yes,** Go to **step 3.**

**No,** Go to **step 1.**

## Before you start steps 1 and 2

To complete steps 1 and 2 you must be the principal authority. Principal authority is a person responsible for the business and must be the first person to set up access to Online services for business.

### **Step 1 – Set up your Digital Identity (myGovID)**

Download the myGovID app and set it up. Here are some instructions to follow on how to set myGovID (<https://www.mygovid.gov.au/set-up>)

Ensure your identity reaches at least a 'Strong' strength level. (Note: If you can't get to Strong, please contact ATO on 1300 287 539).

**➔ Remember that myGovID is different from MyGov.**

**➔ You will need at least standard Identity strength to set up your business for online services. Ensure you have access to Online Services each of your businesses.**

You will know if you've done it if you can generally access each of your entities / businesses using Online Services for Businesses.

If you have not done this step, you will need to do the below:

### **Step 2- Link your myGovID to your ABN**

To link your entities / businesses to your myGovID, you'll need to use the Relationship Authorisation Manager (RAM) process. RAM is where you can manage your business authorisations and user access.

Please note, you'll need to be a principal authority for the entity /business to do this. In this process you can provide others with the authority to represent your entity / business.

**In case for Trusts with Corporate Trustees: When trying to link up in RAM, if you're not listed as an associate for the entity on the Australian Business Register you won't be able to link to in RAM. This is common if the Trust has a Corporate Trustee. You may have to make a phone call to the ATO to assist, and the ATO will manually link them from their side.**

If you already have done this step, then go to step 4.

### **Step 3 – Log in to Online Services for Business**

Use your myGovID to log in to <https://onlineservices.ato.gov.au/business/>

### **Step 4 – Nominate your authorised agent in Online services for business**

This step is what gives authority for your new accountant to access the business records. You will need to do this for each of your entities / businesses.

**➔ To complete this step, you'll need your agent's registered agent number.**

## Link your nominated Agent to your business

From the Online services for business home page:

### 1. Select the specific entity/business:



Australian Government  
Australian Taxation Office

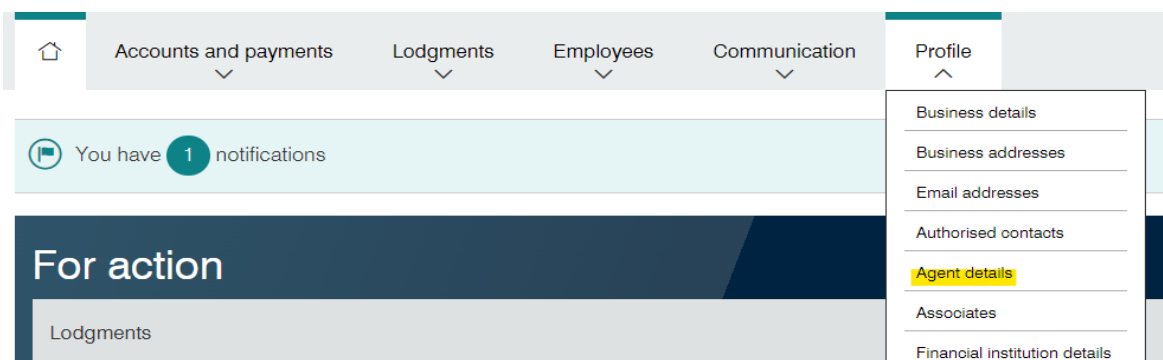
### Online services for business

Select an ABN to continue

Name	ABN
<input checked="" type="radio"/> [Redacted] PTY LTD	[Redacted]
<input type="radio"/> [Redacted] PTY LTD	[Redacted]
<input type="radio"/> [Redacted]	[Redacted]
<input type="radio"/> THE TRUSTEE [Redacted]	[Redacted]
<input type="radio"/> [Redacted]	[Redacted]

Next

### 2. select **Profile**, then **Agent details**



Accounts and payments | Lodgments | Employees | Communication | **Profile**

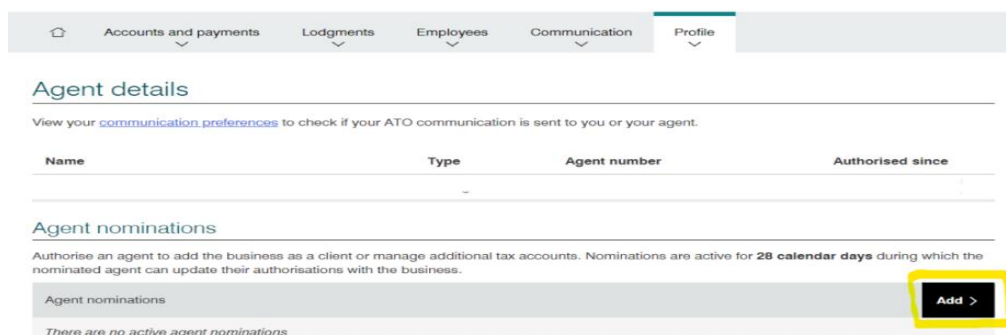
You have 1 notifications

### For action

Lodgments

- Business details
- Business addresses
- Email addresses
- Authorised contacts
- Agent details**
- Associates
- Financial institution details

### 3. at the **Agent nominations** feature, select **Add**



### Agent details

View your [communication preferences](#) to check if your ATO communication is sent to you or your agent.

Name	Type	Agent number	Authorised since
-			

### Agent nominations

Authorise an agent to add the business as a client or manage additional tax accounts. Nominations are active for **28 calendar days** during which the nominated agent can update their authorisations with the business.

Agent nominations

There are no active agent nominations

Add >

### 4. on the **Nominate agent** screen, go to **Search for agent**.

Search for the Registered Agent Number or Practice Name for example **Fair Tax Accountant**

### 5. type your agent's registered agent number and select **Search**

### 6. select the agent you want to nominate.

### 7. check that the agent's details are correct.

8. complete the **Declaration**.

9. select **Submit**.

### Nominate agent

All fields marked with \* are mandatory.

Identify the agent by entering their agent number or practice name. To quickly identify a specific agent, search by agent number.

Search for agent \*  
[Redacted] Pty Ltd

**Agent nomination**  
Authorise the following agent to add the business as a client or manage additional tax accounts.

Name	[Redacted] PTY LTD
Agent number	[Redacted]
Suburb/town	[Redacted]
State/territory	[Redacted]
Nomination expiry date	18/12/2023

#### Declaration

> I declare the information I have provided is true and correct.

**Privacy:** For important information about your privacy see our [Privacy notice](#) ↗

Tick this box to sign this declaration with the identification details you used to log-in. \*

You'll now see your agent's details listed under **Agent nominations**.

For more information, go to <https://www.ato.gov.au/online-services/businesses-and-organisations-online-services/agent-nomination-process>

### Step 5 – Let your agent know you have nominated them

The agent you nominate won't receive an automated system notification. It's important to let them know when you've completed the nomination step.

Your agent has 28 days to action the nomination before it expires.

Contact Fair Tax Accountant team in Geelong 0352412982