

RMS – Customs and Excise new Online System Assistant Accounts

This document explains the process to re-confirm assistant accounts in the new Customs system which is being rolled out on the 21st November 2022.

Check if you have assistants set up

If you have assistant accounts set up for administering your clients VAT returns, you can see them in online services. Select “Account” from the menu.

The screenshot shows the top navigation bar of the online services portal. On the left is the Isle of Man Government logo and the text "online services". On the right, the user is logged in as "Agent Demo". A dropdown menu is open, showing options for "Account", "Messages", and "Log Out". Below the navigation bar is a yellow "Service Update" banner with a warning icon, stating that online services will be intermittently unavailable on Wednesday 16th November between 8:00am and 9:00am due to infrastructure upgrades.

The screenshot shows the "Administration Home" page. A "Show menu" button is highlighted with a red box. The page title is "Administration Home" and there is a hamburger menu icon on the right.

The screenshot shows the "Administration Home" page with the "Assistants" link highlighted in a red box. Other links include "Account History", "Payment History", "Change Your Details", "Change Password", "Change Security Question", "Change Memorable Information", and "Change Organisation Information".

This will show the list of assistant accounts currently active on the account. You can add or disable agents though this menu.

The screenshot shows the "Assistants" page. There is a "Show menu" button and a "Disabled" filter button. A text box explains how to disable an assistant. Below is a table with the following data:

Login ID	User Name	Access Level	Locked	Inactive
Agentdemo	Agent Demo	Administrator		

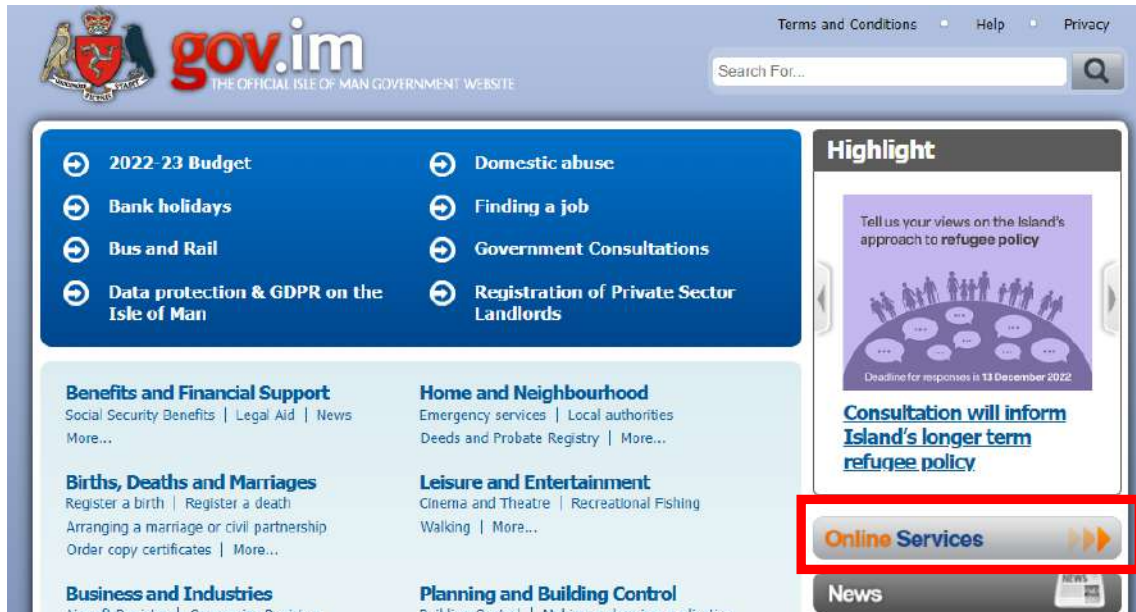
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Signing into RMS for the first time.

The main agent account will be migrated with all your clients. When the main agent signs in for the first time on the new system, you will see the full client list. Assistant accounts will still exist but won't automatically have access to the client list. The following process needs to be followed to set up assistant permissions.

Main Agent initial log in process

Main agent signs into Online Services for the first time after the new system goes live, and navigates to “Customs and Excise” section of online services



The new system will only have 2 options, “customs general payments” and “online portal”. Select online portal.

The first time the main agent signs into the online portal, they will need to authenticate the login. The following page will appear and the main agent will need to click approve if the information is correct. If the information is incorrect please call Customs & Excise on 648120.

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Approve claims for service:

In order to use the VATRMS service, the following information must be provided to the department responsible for the service

acname [Sally Agent Ltd]	The name associated with the account the user belongs too
username [Sally Agent]	The user name i.e. full name typed into online services at registration
email	The email address against the user
phone [01624123456]	The phone number against the user
dob [1980-02-15]	Users date of birth as entered at registration

Approve

Once this has been completed, the main agent should have access to their full client list.

The screenshot shows the 'online services' portal for the Isle of Man Government Customs & Excise Division. The user is logged in as 'Greg'. The main content area is titled 'Hi Greg' and displays 'Your Registered Taxpayers'. A list of three taxpayers is shown: Alex Horne Limited, Greg Davies Limited, and Sarah Millican Limited. The first entry, Alex Horne Limited, is highlighted with a red box. To the right, there is a 'Messages' section indicating no unread messages. The top navigation bar includes 'Home', 'Inbox', and 'UAT version 1.0.2.0 / the version 3.1.2.81'.

UAT version 1.0.2.0 / the version 3.1.2.81

Isle of Man Government Customs & Excise Division site Contact us Greg davies

Home Inbox

Hi Greg

Taxpayers associated with your user account are displayed below. Select a taxpayer from the list below to view their account.

Your Registered Taxpayers

Click the view link to select a taxpayer.

Search:

Taxpayer	TIN
Alex Horne Limited	
Greg Davies Limited	
Sarah Millican Limited	

Showing 1 to 3 of 3 entries

Previous 1 Next

Messages

You have no unread messages.

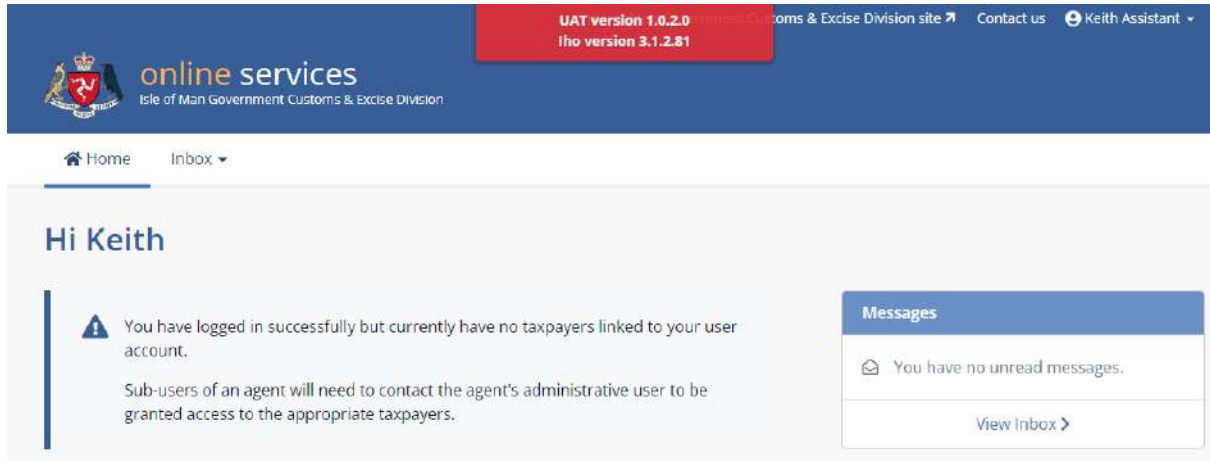
View Inbox

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Assistants initial log in process

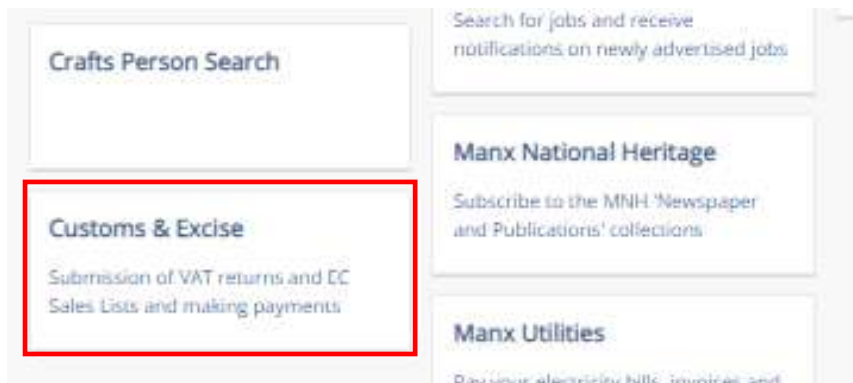
Assistants need to log in as per the main agent initial log in process and complete the login authentication.

Assistants will receive a message to say they need to contact their agent for access to clients.



Main agent assigning permission to assistants

Once the assistant has completed the initial log in, the main agent should now have the ability to manage their assistant's permissions. To do this, go to Customs & Excise online services



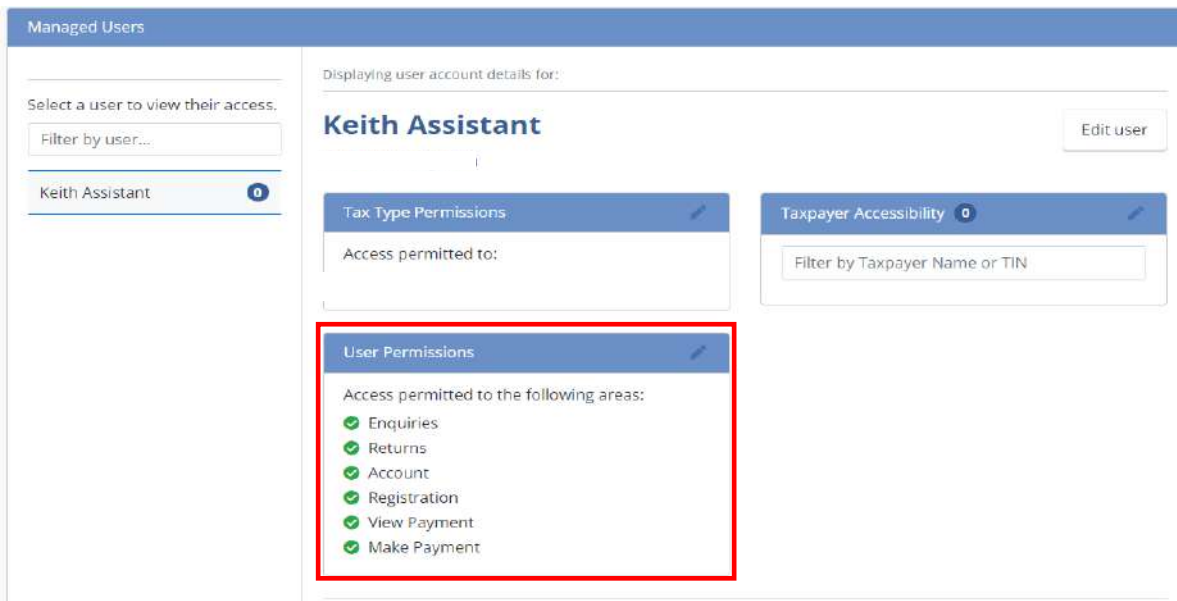
Select the "Online Portal" option

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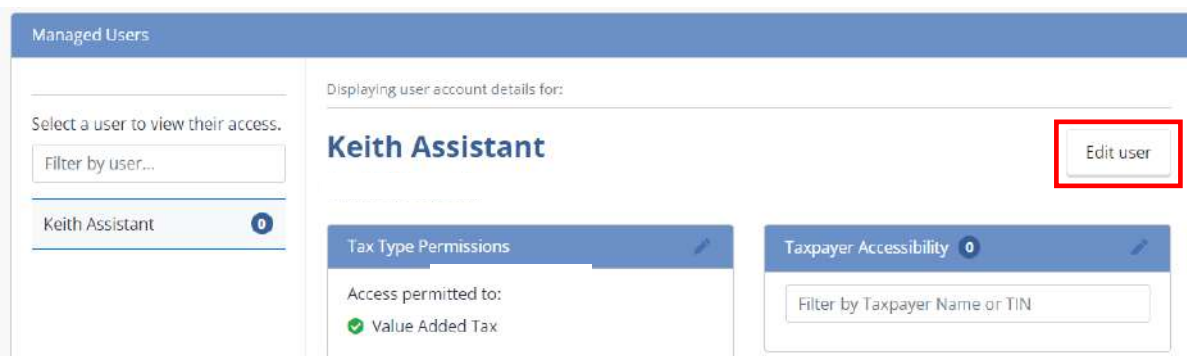
From the menu under the main agent account name, select Manage User Access



Here you can see all the assistants and what permissions they currently have.



To amend the assistants permissions click Edit User



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User Details allows you to update their personal information.

▼ User Details
Edit the details of the user.

First & last name: *

Date of Birth: * Day: * Month: * Year: *

Date of birth may be used to help verify the user's identity. The user must be at least 18 years old.

Phone Number: *

User Permissions allows you to amend what access assistant have, to the areas in the clients online account.

▼ User Permissions
Select one or more areas this user will be allowed to access across all taxpayers selected.

Select all areas

Enquiries

Returns

Account

Registration

View Payment

Make Payment

Tax Type Permissions allows you to select which client tax types you want assistants to see.

▼ Tax Type Permissions
Select one or more tax types this user will have access to across all taxpayers selected.

Select all tax types

Value Added Tax

Value Added Tax INT

Value Added Tax POA

Selecting a specific tax type will allow this user to view this tax type information only for each taxpayer selected. For example a user permitted to view VAT only will be able to view all VAT information.

Select all tax types if you want to allow this user full tax type access for each taxpayer selected.

Tax Payer Accessibility allows you to allocate clients to your assistant.

▼ Taxpayer Accessibility
Select one or more taxpayers this user will have access to.

Taxpayer

Select one or more taxpayers to complete this user profile.

Taxpayers assigned: 0 from 3

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To do this click manage taxpayers

This gives you a menu of the clients available for selection on the left and the taxpayers the assistant currently has access to on the right.

Select taxpayers ×

Select one or more taxpayers this user will be allowed access to.

To add them to the assistant list click on the green plus

This moves them to the assistants list

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To remove them click the red minus

Available Taxpayers (2) Select all	Selected Taxpayers (1) Remove all
<input type="text" value="Filter by Taxpayer Name or TIN"/>	<input type="text" value="Filter by Taxpayer Name or TIN"/>
Customs customer (TIN:) +	Customs Client (TIN:) -
Customs Demo (TIN: 1) +	

Once finished click save changes.

Available Taxpayers (2) Select all	Selected Taxpayers (1) Remove all
<input type="text" value="Filter by Taxpayer Name or TIN"/>	<input type="text" value="Filter by Taxpayer Name or TIN"/>
Customs customer (TIN:) +	Customs Client (TIN:) -
Customs Demo (TIN:) +	

[Save Changes](#) [Cancel](#)

When the assistant signs in again they should now have access to the clients you have added to their account.