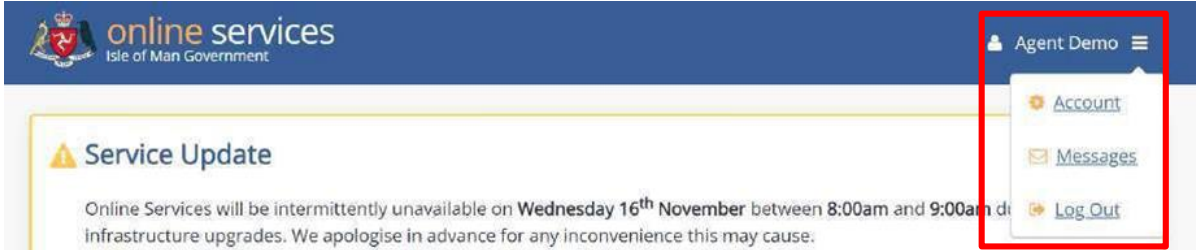


Managing Assistants

If you have assistant accounts set up for administering your client's VAT returns, you can see them in online services. Select Accounts from the online services menu.



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



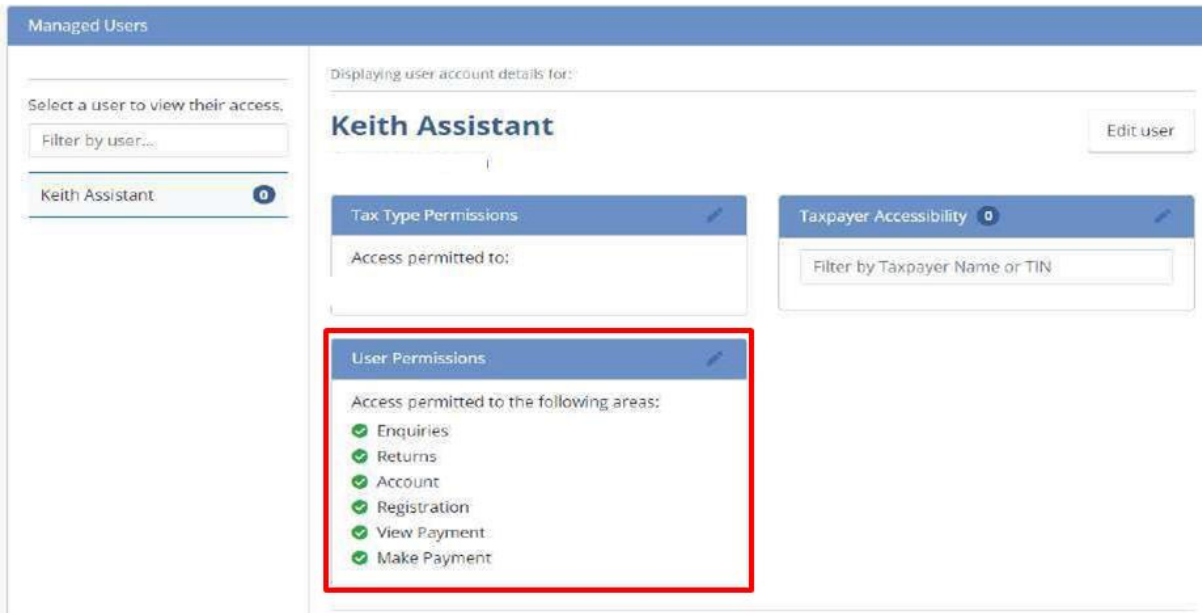
Managing assistant's permission levels

Once the assistant has completed the initial login, the main agent should now have the ability to manage their assistant's permission. To do this you must be logged on in the Customs and Excise Online Portal.

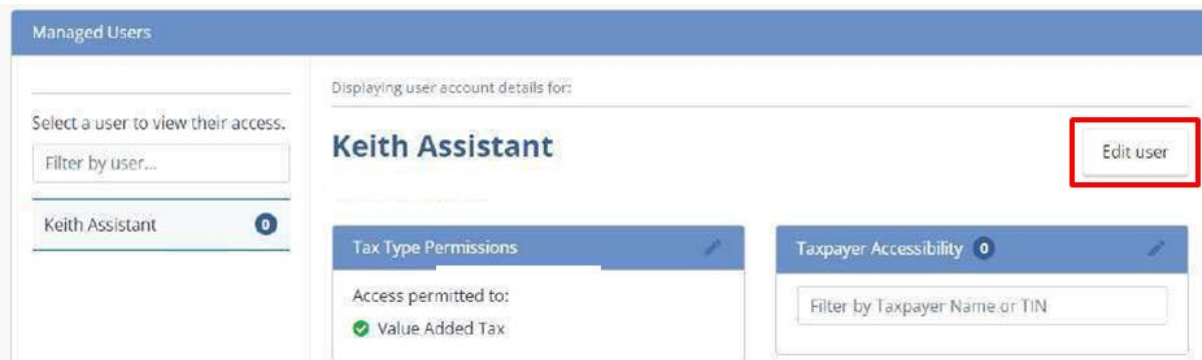
From the menu under the main agent account name, select Manage User Access.



Here you can see all your assistants and their current permission levels.



To amend an assistant's permissions, click Edit User.



User details allows you to update their personal information.

▼ User Details
Edit the details of the user.

First & last name: * Keith Assistant

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

1 1 1900

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

Phone Number: * +44 457898

User permissions allows you to amend the access an assistant has to the areas in a client's 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 your assistant will have access to.

▼ 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.

Taxpayer Accessibility allows you to allocate clients to your assistant. Click the Manage Taxpayers button.

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

Manage Taxpayers

Taxpayer

Select one or more taxpayers to complete this user profile.

Taxpayers assigned: 0 from 3

This gives you a full list of all available clients on the left, and clients allocated to this assistant on the right.

Select taxpayers ×

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

Available Taxpayers (3) Select all	Selected Taxpayers (0) Remove all
<input type="text" value="Filter by Taxpayer Name or TIN"/>	<input type="text" value="Filter by Taxpayer Name or TIN"/>
<p>Customs Demo (TIN: ...) +</p> <p>Customs Client (TIN: ...) +</p> <p>Customs customer (TIN: ...) +</p>	<p>Select one or more taxpayers from the list of available taxpayers.</p>

To add a client to this assistant, click on the green plus. This moves them to the assistant's list.

Available Taxpayers (3) Select all	Selected Taxpayers (0) Remove all
<input type="text" value="Filter by Taxpayer Name or TIN"/>	<input type="text" value="Filter by Taxpayer Name or TIN"/>
<p>Customs Client (TIN: ...) +</p> <p>Customs customer (TIN: ...) +</p> <p>Customs Demo (TIN: ...) +</p>	<p>Select one or more taxpayers from the list of available taxpayers.</p>

To remove a client from this assistant, click the red minus. This moves them to the available client's list. Once all moves have been completed, click Save Changes.

Available Taxpayers (2) [Select all](#) Selected Taxpayers (1) [Remove all](#)

Filter by Taxpayer Name or TIN

Filter by Taxpayer Name or TIN

Customs customer (TIN:) [+](#)

Customs Demo (TIN:) [+](#)

Customs Client (TIN:)) [-](#)

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

When the assistant next signs in they will have access to those clients that you have allocated to them.

Contact us [Pippin Loach](#)

online services
Isle of Man Government Customs & Excise Division

[Home](#) [Inbox](#)

Hi Pippin

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
Mr Rubeus Loach	100-1012-348
Pippins Payroll People	100-1012-586

Showing 1 to 2 of 2 entries [Previous](#) **1** [Next](#)

Messages

You have no unread messages.

[View Inbox](#)