

## ATO Requirement:

The Australian Taxation Office now requires you to link us as your Tax or BAS agent. This is a onetime step that ensures we can represent you officially and take care of your tax matters.

## Your Step-by-Step Guide to Agent Linking

This setup allows us to securely and efficiently access and manage your tax and financial details. It's the foundation for our smooth collaboration ahead.

### Step 1: Lets setup your myGovID (Already have a myGovID, go to Step 2.)

#### **Set Up Your Digital Identity with myGovID:**

myGovID serves as the government's Digital Identity app, enabling you to authenticate your identity for online services.

[Get myGovID / https://www.mygovid.gov.au/set-up](https://www.mygovid.gov.au/set-up)

**Download the myGovID app** from the official app stores. The myGovID app is compatible with most smart devices.



**Open the myGovID app** and follow the prompts. You will need to enter your full name, date of birth and email address.

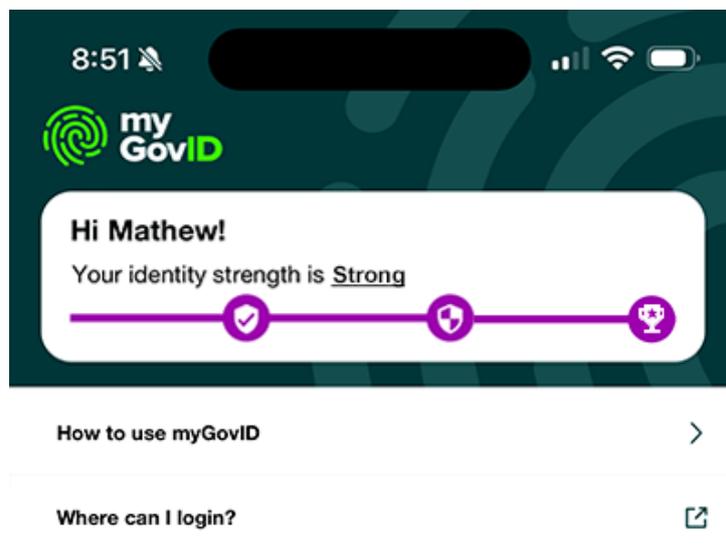
## Add your identity documents

You'll need **at least two** of the following Australian identity documents (your name must match on both):

- passport
- birth certificate
- driver's licence or learner's permit
- visa (using your foreign passport)
- citizenship certificate
- ImmiCard
- Medicare card – once you verify one of the documents above in the app, you'll have the option to add your Medicare card.

**Note:** If your name doesn't match across your two identity documents, you may be able to verify this using a change of name certificate (Tasmania, South Australia, Northern Territory and the Australian Capital Territory only) or a marriage certificate. Otherwise you should update your documents to match before you verify your first document.

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](tel:1300287539) or [read more here](#))



# VBA Client-agent linking Guide

## Step 2: Link your myGovID to your ABN

### [How to link your business in RAM Video from the ATO](#)

To create this link, use the government's Relationship Authorisation Manager (RAM) website.

You will need to be an eligible associate to link your business to RAM.

An eligible associate is either a:

- Sole trader
- Trustee
- Director
- Public Officer
- Partner
- or Office Bearer of a club or association

If you're the principal authority for the business, you'll need to initiate this step.

**Note:** if the only listed associate is another entity, i.e. not an individual, you'll need to manually link the business by calling the ATO on **1300 287 539 – See Note for Trusts**

### Link and Verify

[OPEN RAM / https://info.authorisationmanager.gov.au/](https://info.authorisationmanager.gov.au/)

### Select **Link your business**

Back to Relationship Authorisation Manager TEST USER

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## TEST USER

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Select businesses

You are recorded as an eligible associate on the Australian Business Register (ABR) for the businesses listed below. If this list is incomplete or incorrect, ensure details on the ABR are up to date. [Find out more](#)

**Note:** any active authorisations you already have for the selected business/es will be overridden with your new role as Principal authority once the linking process is complete.

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Select all To ensure you are linking the correct businesses, you should review the full list before selecting all. 2 out of 2 selected

Entity name ▲	ABN ▼
<input checked="" type="checkbox"/> Test Company	11 222 333 444
<input checked="" type="checkbox"/> MR TEST USER	99 888 777 666

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# VBA Client-agent linking Guide

- Add** your residential address as held by the ATO
- Select eligible business** (that you're an associate for) from the list
- Enter an email address** under step 1
- Click send email**
- Check** email address for the verification code
- Type** verification code and **Select** Verify
- Select** understand and submit

Back to [Relationship Authorisation Manager](#) TEST USER

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Your email

To link your selected business/es, you need to provide and verify your business email address.  
**Note:** existing [principal authorities](#) linked to this business will be notified once you've linked.

Complete the two steps process below.

Step 1

Enter your email address to receive your 6 digit verification code 

Step 2

Enter the 6 digit verification code sent to your email.

## Complete Linking

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### TEST USER

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Your email

 Verification successful

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**2** **Businesses successfully linked: 2 of 2**

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You can now manage authorisations and access online services on behalf of the linked ABN.

An email notification has been sent to associates linked to this ABN in RAM.

## Note for Trusts: (Important Information)

When trying to link up in RAM, if you're not listed as an associate for the entity in the ABR you won't be able to link to in RAM.

This is common for a trust depending on how it's setup. This issue is often run into when the **trust has a corporate trustee** that the individual is a director of the trustee company - they're then an indirect associate of the trust.

**This requires the ATO to manually link them on ATO side and may require a phone call to the ATO to assist. They will stay on the phone until the entire process is complete in case there are any issues.**

1. **Phone 1300 287 539** and Select **Option 3** during operating hours.
2. **Advise the ATO** that you would like to link an ABN to the RAM (Relationship Authorisation Manager) for your trust which has a corporate (company) as trustee that you are a director of.
3. Complete a proof of identity check to confirm your association to the business.

### **Documents to have on hand that may be required to prove your identity.**

- Personal Tax File Number
- Personal Income Tax Return – They may ask questions about some items that were in your last lodged income tax return.
- Notice of Assessment (No older than 5 years)
- Drivers Licence
- Personal Information (possibly Name and Email address)
- ABN of the business you want to link
- TFN of the Corporate Trustee
- They may ask for some other information depending upon your circumstances.

*This process may take approximately 10-15 minutes.*

4. Once confirmed, you'll receive an email with an authorisation code and summary of the authorisation request.
5. Log in to RAM to accept the request and complete the link.

## Step 3: Nominate your Authorised Agent

- a. Access “[Online Services](https://onlineservices.ato.gov.au/business/BusinessLogin.html)” for Business – (Use your myGovID to login)

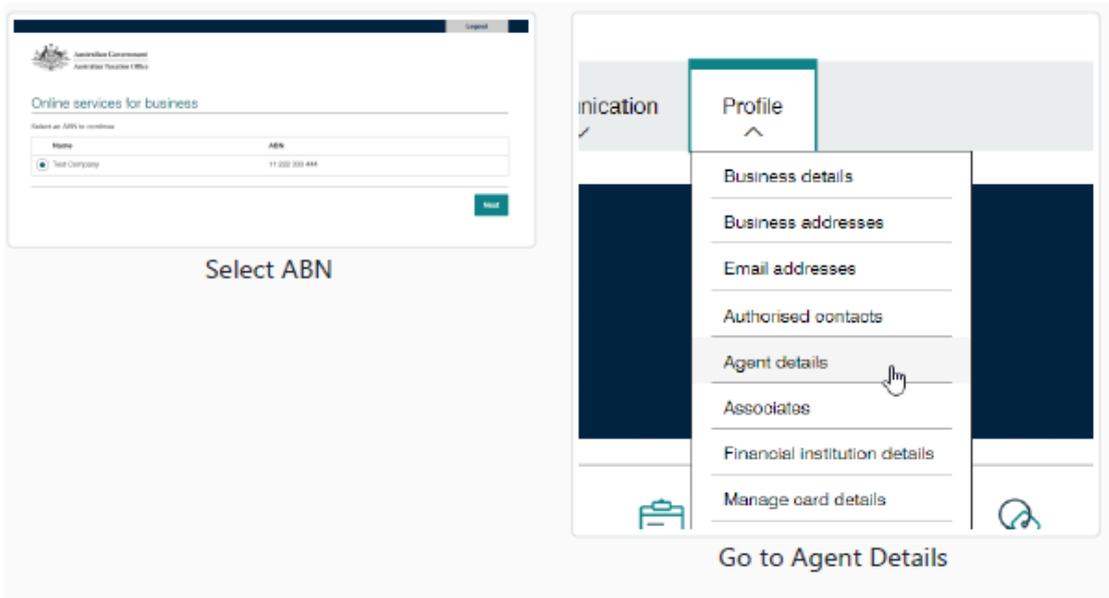


## Online services for business

Login

By logging in, you agree to the [terms and conditions](#)

- b. Nominate your Authorised Agent:  
Once lodged in to “**Online Services**”  
**Select your ABN** from the List, Next  
Go to **Profile, Agent Details** from the Menu  
At the Agent nominations feature, select **Add**



The image contains two screenshots from the Australian Taxation Office's online services for business portal. The left screenshot, titled "Select ABN", shows a form where a user can select an ABN to nominate. It includes a table with columns for "Name" and "ABN", and a "Nominate" button. The right screenshot shows the "Profile" menu with options like "Business details", "Business addresses", "Email addresses", "Authorised contacts", "Agent details", "Associates", "Financial institution details", and "Manage card details". A hand cursor is pointing at "Agent details", and the text "Go to Agent Details" is displayed below the menu.

**i** You do not currently have a registered agent

### Agent nominations

Authorise an agent to add the business as a client nominated agent can update their authorisations w

Agent nominations

*There are no active agent nominations*

Add agent

On the nominate agent screen, go to **Search for agent**  
Type “Victor Bimrose Accountancy” or “68941001” (RAN)  
**Select our Firm** as the Agent  
**Tick the box to Complete the Declaration** and **Submit**

## Step 4: Let us know when you're done:

We do not get any confirmation that you have linked your accounts to our business. Please email [info@vbatax.com](mailto:info@vbatax.com) to let us know that you have completed the Client-Agent Linking process as this has a 28 day expiration date and we wouldn't want you to complete this again.