

## Authorising portal access for R&D consultancy

For all claims from and including the 2020-21 financial year, the Australian Government has made some changes to the Research and Development Tax Incentive (R&DTI) process that align the application and lodgement process with streamlined access and electronic R&DTI processing.

These changes make provisions for you, the 'principal authority', to authorise access of a tax agency or R&D consultancy by using the 'Manage Access' option within your R&DTI customer portal.

*If nobody from your company has previously been linked to the R&DTI Customer Portal, the [principal authority](#) will need to get portal access first ([Principal authority definition](#)) via [Apply to register with the R&D Tax Incentive | business.gov.au](#) and follow the 'Apply now' directives at the bottom of the page. Please note that you will require an Australian Government MyGovID for this process, directions to obtain this are below.*

### How do I authorise portal access for RADBE as my R&D consultancy?

1. **Login** to the [R&DTI customer portal](#).
2. **Click the 'Manage access'** option on the 'Manage your applications' dashboard.
3. **Click 'Add new authorisation'** on the 'Manage Access' screen, under the 'Business authorisations' heading.
4. **Enter RADBE's ABN** as an R&D consultancy you want to authorise; [RADBE ABN: 66 129 757 277](#)
5. **Select 'Tax professional'** as the relationship.
6. **Enter the start and end dates** for the authorisation period. Note the start date can't be back dated. The end date should be considered beyond June 30 of the following year, unless you wish to select longer in order to avoid making this an annual requirement, RADBE recommends a period of 3-years.
7. **Click 'Add authorisation'**.
8. **Inform** the tax agent or R&D consultant they can now log in to the R&DTI customer portal.

\*Please be mindful that some browsers may experience difficulties with the R&DTI customer portal, such as Safari.

### Can RADBE help?

Please [contact](#) your local RADBE Consulting office for any assistance with this process or more information regarding either the process or your eligibility.

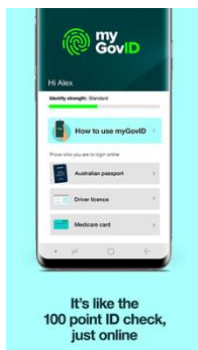
RADBE are registered with the Tax Practitioners Board with registered tax agents for R&D tax advice purposes and adopt an ISO 31000 Risk Management framework, which identifies how we treat client confidentiality and tax risk mitigation.

### Step 1: How to setup your MyGovID

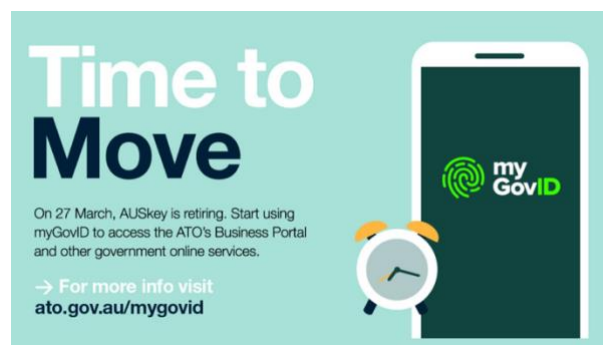
You will need a *smart device* in order to obtain the myGovID application from the Apple App Store or Google Play.

The Government's [How to set up](#) page covers links to download the app, details and identity documents required.

Please note that in order to verify your identity, you will require two of the following documents:



- Driver's licence or learner's permit
- Passport
- Birth certificate
- Visa (when using a foreign passport)
- Citizenship certificate
- ImmiCard
- Medicare card



### Step 2: Linking your MyGovID to your Business (ABN)

You will be required to link your new myGovID to your business (Relationship Authorisation Manager), which is achieved by verifying your identity with the ATO and linking the MyGovID with the business ABN.

Where an individual (a 'principal authority') is already linked, they can authorise you to act on behalf of the business for R&D purposes via RAM. Where this is not the case, and nobody is linked to the business, the ATO advises the following steps in order to achieve the link:

1. Phone 1300 287 539 and select option 3
2. You will need to provide personal details to complete a proof of identity check
3. Checks will be completed to confirm that you are associated to the business
4. You will receive an email with an authorisation code and summary of the request
5. Log in to [RAM](#) using your myGovID to accept the request and complete the link

#### Troubleshooting

- Your first and last name recorded in any of the above must match your name as displayed when you're logged into RAM (it appears in the top right corner).
- The difference between authorising R&D access via 'RAM' and the 'RDTI customer portal':  
The "R&D Tax Incentive customer portal" is available via (<https://incentives.business.gov.au/>), this is different to the Relationship Authorisation Manager (RAM). RAM is used to authorise individuals to act on your behalf with certain government programs; authorising someone in RAM for R&D, would for instance, enable them to access the R&D Tax Incentive customer portal.  
Presumably, a director (called: principal authority) of a business already has this authorisation as they can 'access all areas', and then they need to get onto the portal (<https://incentives.business.gov.au/>) and go through the steps on our sheet to enable RADBE the authorisation to be their R&D Consultancy. Rather than putting the details for an individual in, this is done by putting the details for a company (specifically the ABN) in, per the instructions on the sheet.  
<https://incentives.business.gov.au/> states: *if you would like to authorise a business (for example, your tax agency) to collaborate on your registration form and act on your behalf, do can do this after you log into the portal.* This is different to enabling other individuals to act on your behalf, which is achieved through RAM as per the discussion above. As an R&D Consultancy / tax agency 'business', RADBE requires authorisation through <https://incentives.business.gov.au/>
- Some browsers, such as 'Safari' (Apple iOS) are unable to support the RDTI customer portal.