

Copy existing client authorisations across to an Agent Services Account

1

Account home

Manage account

New

Help and Guidance

Welcome to your agent services account

Agent Reference Number: TARN 842 6630

Client authorisations

You must ask your client to authorise you through your agent services account before you can access any services. Copy across an old authorisation or create a new one.

Ask a client to authorise you

Manage your authorisation requests from the last 30 days

Copy across more Self Assessment client authorisations

Cancel a client's authorisation



2

Copy across existing Self Assessment authorisations

You've already copied across all client authorisations under:

User ID: XXXX-XXXX-3546

User ID: XXXX-XXXX-5423

What you need to do

Select 'continue' to sign in with any of your other Government Gateway user IDs. These will be older user IDs that you use for managing Self Assessment clients.

Continue



4

Client relationships found

Your user ID has the following client relationships that you can copy across:

42

Self Assessment clients

By continuing, they will be copied across to your new agent services account. You will then be able to sign these clients up to Making Tax Digital.

Continue



3

Sign in using Government Gateway

Government Gateway user ID

This could be up to 12 characters.

Password

Sign in

Agents need to sign in using their HMRC Online Services for Agents Government Gateway ID for the account(s) where their Self Assessment clients are already authorised.

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Enter the last 4 characters of the Government Gateway user ID you signed in with

You will see this reference number whenever you check your previously copied across clients.

For example, XXXX-XXXX-1234

XXXX-XXXX-

Continue

6

Copied client relationships

42 client relationships

User ID: XXXX-XXXX-3546

Do you need to copy more clients across?

To copy more clients across, you need to sign in with another user ID you use to manage Self Assessment clients.

☐

Yes

☐

No

Continue

7

Once completed, agents need to click 'Finish and sign out' and log back into their Agent Services Account.

Client relationships copied

You copied 42 client relationships to your agent services account

[Finish and sign out](#)