

# Primary Levy Contact

## User Guide

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DATE: September 2022



**He Kaupare. He Manaaki.  
He Whakaora.**  
prevention.care.recovery.



# Primary Levy Contact

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# Primary Levy Contact in MyACC for Business: Overview

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## What is the primary levy contact feature in MyACC for Business?

- This feature allows the primary levy contact for an account to be changed and viewed in MyACC for Business.
- If you are made the primary levy contact for the account, you will receive all invoices and levy-related communication.
- In MyACC for Business, the agent or advisor or levy payer can be made the primary levy contact.

## Why are we making these changes?

- When a customer requests that their invoices/levy information be sent to their agent or advisor, instead of overriding the customer's contact information with that of the agent or advisor's address or email, we will only have to change the primary levy contact for the account to be the agent or advisor.
- This will ensure that the customer's contact information are correct and up to date, even if they elect to have someone else manage their invoices on their behalf

# Primary Levy Contact: Overview

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## Who can change the primary levy contact in MyACC for Business?

- Agent or advisor with manage access to the client's account
- Levy payer/account holder
- Delegate (with Levies and Payments access)

## Who can view the primary levy contact in MyACC for Business?

- Agent or advisor with manage or view access to the client's account
- Levy payer/account holder
- Delegate (with Levies and Payments access)

# **Primary levy contact features in MyACC for Business**

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# View the primary levy contact in MyACC for Business

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- **The following can view the primary levy contact:**
  - Agent or advisor with manage or view only access to the client's account
  - Levy payer/account holder
  - Delegate (with Levies and Payments access)
- **The primary levy contact for the account can be viewed in the following:**
  - Overview page
  - Contact Details page
- **For agent or advisor, they can also view the primary contact in the following:**
  - Client list page
  - Client list CSV download

# View primary contact in Overview page

The name of the primary levy contact for the account is displayed in the Overview Page

<b>COVER DETAILS</b>	<b>Standard Cover</b> 1 Apr 2022 - 31 Mar 2023	
	<b>CoverPlus Extra</b> <b>1 Apr 2023 - 1 Apr 2024 (next year)</b>	<a href="#">&gt;</a>
<b>EMPLOYMENT STATUS</b>	Full time (30 hours or more per week on average)	
<b>LEVY CLASSIFICATION</b>	78340 Computer systems design and related services	<a href="#">Edit</a>
<b>CONTACT DETAILS</b>	999 Street Address line 2 Wellington 1000	<a href="#">Edit</a>
	021 234 566 (Home) <b>test@yahoo.com</b> Awaiting verification...	
<b>PRIMARY LEVY CONTACT</b>	Mr. Snoopy S R	<a href="#">Edit</a>
<b>LEVY COMMUNICATION</b>	By post	<a href="#">Edit</a>
<b>CEASE POLICY</b>	<a href="#">Tell us if you are no longer self-employed.</a>	

# View primary contact in Contact Details page

The name of the primary levy contact for the account is also displayed in the Contact Details page

< CHANGE ADDRESS DETAILS

**i** If you'd like all future levy correspondence, including invoices, to be sent to your agent or advisor on your behalf, you can do this by adding them as the primary levy contact.

If you choose to do so, ensure that the contact details for your account are kept up to date with your own, in the event we need to contact you directly.

**Primary Levy contact**  
Mr. Snoopy S R [Change](#)

**Postal address**  
999 Street

**Postal address line 2** Optional  
Address line 2

Levy Payer or delegate view

< CHANGE ADDRESS DETAILS

**i** If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact**  
Mr. Snoopy S R [Assign to me](#)

**Postal address**  
999 Street

**Postal address line 2** Optional  
Postal address line 2

Agent or advisor view

# View primary contact in Client list page

For an agent or advisor, the primary levy contact is also displayed in the Client List Page

ACC number	Account name <span>▼</span>	Primary Levy Contact <span>▼</span>	Invoice due <span>▼</span>	Alert <span>▼</span>	Balance <span>▼</span>
<span>!</span> A [REDACTED]	<a href="#">Mr. Account01 Test01</a>	Your organisation	9 Jun 2015	Update address	\$8215.18 DR <span>⋮</span>
R [REDACTED]	<a href="#">Mr. Mickey K Mouse</a>	Your organisation	10 Apr 2014	-	\$3772.80 DR <span>⋮</span>
G [REDACTED]	<a href="#">Mr. Captain America</a>	Account holder	28 Sep 2016	-	\$4843.25 DR <span>⋮</span>
A [REDACTED]	<a href="#">Mr. Snoopy S R</a>	Account holder	2 Oct 2017	-	\$1600.20 DR <span>⋮</span>
J4 [REDACTED]	<a href="#">Avengers Group Ltd</a>	Your organisation	26 Jan 2018	-	\$42878.82 DR <span>⋮</span>
A [REDACTED]	<a href="#">Mr. Winnie S Pooh</a>	Account holder	23 Aug 2020	-	\$6995.06 DR <span>⋮</span>
J [REDACTED]	<a href="#">Mrs. Wonder Ann Woman</a>	Your organisation	26 Apr 2022	-	\$3751.03 DR <span>⋮</span>
A [REDACTED]	<a href="#">Mr. Wolverine Xmen</a>	Account holder	25 May 2022	-	\$2511.67 DR <span>⋮</span>
A [REDACTED]	<a href="#">ABC DEF GHI</a>	Account holder	-	-	\$84.07 DR <span>⋮</span>
J9 [REDACTED]	<a href="#">Mr. Donald Duck</a>	Other party <span>i</span>	12 tax agent trading as test ta	-	\$0.00 CR <span>⋮</span>
M [REDACTED]	<a href="#">Mr. S Superman</a>	Other party <span>i</span>	-	-	\$4597.76 DR <span>⋮</span>

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### Account holder:

Levy payer is the primary levy contact

### Your Organisation:

The agent or advisor who is logged in is the primary levy contact

### Other Party:

Another representative (not the agent or advisor who is logged in) is the primary levy contact. (The name of the representative will be displayed on hover of the info icon)

# View primary contact in Client list page

The primary levy contact is also displayed in the client list CSV download

At [REDACTED]	<a href="#">ABC DEF GHI</a>	Account holder	-	-	\$84.07 DR	⋮
JS [REDACTED]	<a href="#">Mr. Donald Duck</a>	Other party ⓘ	-	-	\$0.00 CR	⋮
M [REDACTED]	<a href="#">Mr. S Superman</a>	Other party ⓘ	-	-	\$4597.76 DR	⋮

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Download CSV

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
ACC numb	Account T	Balance	Display Na	FirstName	LastName	Primary PI	Home Nur	Work Num	Mobile Nu	Email add	Address	Valid addr	ACC addr	Preferred	Primary Levy Contact	Policy 1: P	Policy 1: P	Policy 1: C	Policy 1: Ir	Policy 1: C Polic	
A1007906	Bar...	3531.67	Mr. Mahi	Waharua	Xmas	Kapa	78800455	67557570	2 775 108	automatic	5 Dairym	TRUE	E	Preferred Post	Account holder	A1007906	Employer	WorkPlace Cover	1300	Dain Part	
A:														E	Preferred Email	Account holder					
A:														E	Preferred Post	Account holder					
A:														E	Preferred Post	Account holder					
A:														E	IRD Post	Your organisation					
G:														E	IRD Post	Account holder					
J1														E	Preferred Email	Your organisation					
J4														E	Preferred Email	Your organisation					
J9														E	IRD Email	Other party					
M														E	Preferred Email	Other party					
R:														E	Preferred Post	Your organisation					

# Change the primary levy contact in MyACC for Business

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- **The following can change the primary levy contact:**
  - Agent or advisor with manage access to the client's account
  - Levy payer/account holder
  - Delegate (with Levies and Payments access)
- **The agent or advisor can:**
  - Assign themselves as primary contact
  - Remove themselves as primary contact (making the levy payer as the primary contact again)

# Change the primary levy contact in MyACC for Business (continued)

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- The levy payer can:
  - Assign the primary contact to an agent or advisor
  - Set the primary contact back to themselves
- The delegate can:
  - Assign the primary contact to an agent or advisor
  - Set the primary contact back to the levy payer

# Agent or advisor assigns themselves as the primary levy contact for the account

1. From the client list page, click **Edit primary levy contact** link
2. The client's contact details page will appear. Click **Assign to me** link
3. The name of the agent or advisor will be displayed

R	<a href="#">Mr. Mickey K Mouse</a>	Your organisation	10 Apr 2014	-	\$3772.80 DR	<a href="#">View profile</a>
G	<a href="#">Mr. Captain America</a>	Account holder	28 Sep 2016	-	\$4843.25 DR	<a href="#">Edit primary levy contact</a>
A	<a href="#">Mr. Snoopy S R</a>	Account holder	2 Oct 2017	-	\$1600.20 DR	<a href="#">Unlink client</a>
J	<a href="#">Avengers Group Ltd</a>	Your organisation	26 Jan 2018	-	\$42878.82 DR	

1

### CHANGE ADDRESS DETAILS

**i** If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact**  
Mr. Mickey K Mouse

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**2** [Assign to me](#)

### CHANGE ADDRESS DETAILS

**i** If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact**  
Mr. Tax Agent trading as Tax agent

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**3** [Undo](#)

# Agent or advisor assigns themselves as the primary levy contact for the account (continued)

4. Click the **Submit** button to submit the changes.
5. Once the change is submitted, the new primary levy contact is displayed in the different pages in MyACC for Business (Refer to Slide 6)

**Primary Levy contact**  
Mr. Tax Agent Trading as Tax agent [Undo](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**Postal address line 3** Optional  
Postal address line 3

**City / Town**  
Wellington

**Post Code**  
9999 [Postcode finder](#)

**Home phone**  
02 1234567

**Work phone**  
Work phone

**Mobile phone**  
Mobile phone

**Email Address** Optional  
testuser@yahoo.com

I want to receive levy communications via email.

**i** To receive levy communications by email, you need to verify your email first. We'll send you a verification email. The link is valid for 48 hours.

[Cancel](#) [Submit](#)

# Agent or advisor removes themselves as the primary levy contact for the account

1. From the client list page, click **Edit primary levy contact** link
2. The client's contact details page will appear. Click **Remove** link
3. The name of the levy payer will be displayed

R	<a href="#">Mr. Mickey K Mouse</a>	Your organisation	10 Apr 2014	-	\$3772.80 DR	<a href="#">View profile</a>
G	<a href="#">Mr. Captain America</a>	Account holder	28 Sep 2016	-	\$4843.25 DR	<a href="#">Edit primary levy contact</a>
A	<a href="#">Mr. Snoopy S R</a>	Account holder	2 Oct 2017	-	\$1600.20 DR	<a href="#">Unlink client</a>
J	<a href="#">Avengers Group Ltd</a>	Your organisation	26 Jan 2018	-	\$42878.82 DR	

1

### CHANGE ADDRESS DETAILS

**1** If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact**  
Mr. Tax Agent trading as Tax agent **2** [Remove](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

### CHANGE ADDRESS DETAILS

**1** If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact** **3**  
Mr. Mickey K Mouse [Undo](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

# Agent or advisor removes themselves as the primary levy contact for the account (continued)

4. Click the **Submit** button to submit the changes
5. Once the change is submitted, the new the primary levy contact is displayed in the different pages in MyACC for Business (Refer to Slide 6)

**Primary Levy contact**  
Mr. Mickey K Mouse [Undo](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**Postal address line 3** Optional  
Postal address line 3

**City / Town**  
Wellington

**Post Code**  
9999 [Postcode finder](#)

**Home phone**  
02 1234567

**Work phone**  
Work phone

**Mobile phone**  
Mobile phone

**Email Address** Optional  
testuser@gmail.com

I want to receive levy communications via email.

**i** To receive levy communications by email, you need to verify your email first. We'll send you a verification email. The link is valid for 48 hours.

[Cancel](#) [Submit](#)

# Agent or advisor assigns to removes themselves as the primary levy contact for the account

1. The agent or advisor can also change the primary contact by clicking **Edit** beside Primary Levy Contact field in the Overview Page
2. The client's contact details page will appear. Follow the steps in Slides 13-16 to update the primary levy contact

COVER DETAILS	<b>Workplace Cover</b> 1 Apr 2022 - 31 Mar 2023
	<b>Workplace Cover</b> 1 Apr 2023 - 31 Mar 2024 (next year)
LEVY CLASSIFICATION	52530 Garden supplies retailing <a href="#">Edit</a>
CONTACT DETAILS	12345 Street Address line 2 Wellington 9999  021 234 567 (Home) y [REDACTED] b.nz ⌚ Awaiting verification...
PRIMARY LEVY CONTACT	Mr. Mickey K Mouse <a href="#">Edit</a>
LEVY COMMUNICATION	By post <a href="#">Edit</a>
CEASE POLICY	<a href="#">Tell us if you are no longer employing staff.</a>
ACTIONS	<a href="#">Adjust liable payroll.</a>

1

CHANGE ADDRESS DETAILS

1 If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. All correspondence for your client will be sent to the email or postal address listed on your own levy account, according to your own levy communication preference.

If you choose to do so, ensure that the contact details for your clients account is kept up to date with their own, in the event we need to contact them directly.

**Primary Levy contact**  
Mr. Mickey K Mouse [Assign to me](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

2

# Levy Payer or delegate (with Levies/Payments access) changes the primary levy contact for the account

1. From the Overview Page, click **Edit** beside Primary Levy Contact field in the Overview Page
2. The levy payer's contact details page will appear and displays the name of the current primary levy contact

COVER DETAILS	<b>Workplace Cover</b> 1 Apr 2022 - 31 Mar 2023
	<b>Workplace Cover</b> 1 Apr 2023 - 31 Mar 2024 (next year)
LEVY CLASSIFICATION	52530 Garden supplies retailing <a href="#">Edit</a>
CONTACT DETAILS	12345 Street Address line 2 Wellington 9999  021 234 567 (Home) y [REDACTED] b.nz ⌚ Awaiting verification... <a href="#">Edit</a>
PRIMARY LEVY CONTACT	Mr. Mickey K Mouse <a href="#">Edit</a> <b>1</b>
LEVY COMMUNICATION	By post <a href="#">Edit</a>
CEASE POLICY	<a href="#">Tell us if you are no longer employing staff.</a>
ACTIONS	<a href="#">Adjust liable payroll.</a>

< CHANGE ADDRESS DETAILS

**i** If you'd like all future levy correspondence, including invoices, to be sent to your agent or advisor on your behalf, you can do this by adding them as the primary levy contact.

If you choose to do so, ensure that the contact details for your account are kept up to date with your own, in the event we need to contact you directly.

**Primary Levy contact** **2** [Change](#)  
Mr. Mickey K Mouse

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

# Levy Payer or delegate changes the primary levy contact for the account (continued)

3. Click **Change** link (under the Primary Levy contact field)
4. The Primary levy contact field will change into a dropdown displaying a list of names. The names include the levy payer and the agent or advisors that are linked to the client
5. Select from the list who you want to be the primary contact for the account. The selected name will be displayed in the field.

**CHANGE ADDRESS DETAILS**

**i** If you'd like all future levy correspondence, including invoices, to be sent to your agent or advisor on your behalf, you can do this by adding them as the primary levy contact.

If you choose to do so, ensure that the contact details for your account are kept up to date with with your own, in the event we need to contact you directly.

**Primary Levy contact**  
Mr. Mickey K Mouse [Change](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**CHANGE ADDRESS DETAILS**

**i** If you'd like all future levy correspondence, including invoices, to be sent to your agent or advisor on your behalf, you can do this by adding them as the primary levy contact.

If you choose to do so, ensure that the contact details for your account are kept up to date with with your own, in the event we need to contact you directly.

**Primary Levy contact**

Please select

- Please select
- Mr. Mickey K Mouse
- Mr. Tax Agent trading as Tax agent
- Marvel Company Ltd

**Postal address line 2** Optional  
Address line 2

**Postal address line 3** Optional  
Postal address line 3

**CHANGE ADDRESS DETAILS**

**i** If you'd like all future levy correspondence, including invoices, to be sent to your agent or advisor on your behalf, you can do this by adding them as the primary levy contact.

If you choose to do so, ensure that the contact details for your account are kept up to date with with your own, in the event we need to contact you directly.

**Primary Levy contact**  
Mr. Tax Agent trading as Tax agent [Undo](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

# Levy Payer or delegate changes the primary levy contact for the account (continued)

6. Click the **Submit** button to submit the changes
7. Once the change is submitted, the new primary levy contact is displayed in the different pages in MyACC for Business (Refer to Slide 6)

**Primary Levy contact**  
Mr. Tax Agent Trading as Tax agent [Undo](#)

**Postal address**  
12345 Street

**Postal address line 2** Optional  
Address line 2

**Postal address line 3** Optional  
Postal address line 3

**City / Town**  
Wellington

**Post Code**  
9999 [Postcode finder](#)

**Home phone**  
02 1234567

**Work phone**  
Work phone

**Mobile phone**  
Mobile phone

**Email Address** Optional  
testuser@yahoo.com

I want to receive levy communications via email.

**i** To receive levy communications by email, you need to verify your email first. We'll send you a verification email. The link is valid for 48 hours.

[Cancel](#) [Submit](#)

6

# Other primary levy contact features in MyACC for Business

- When adding a new a client

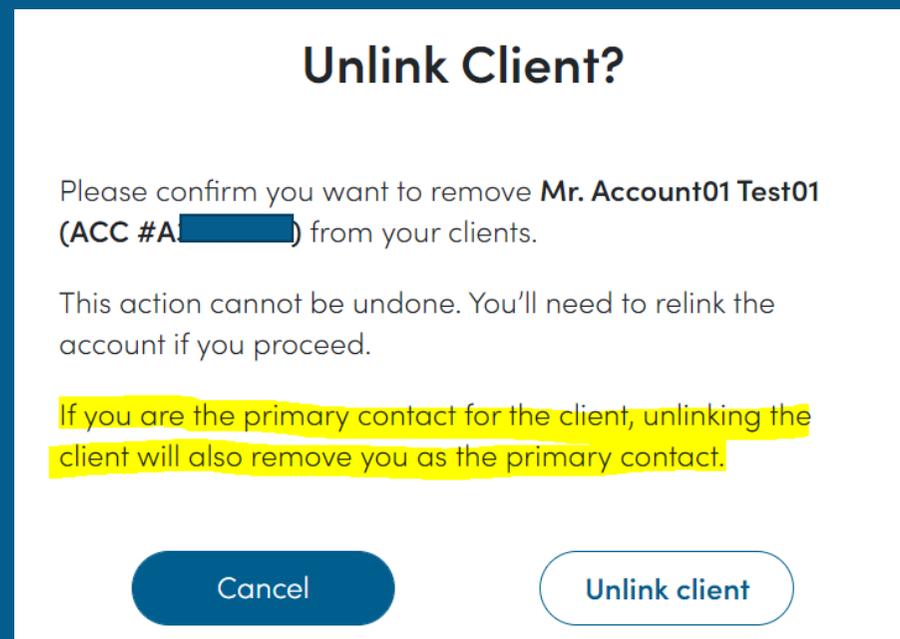
- ✓ When an agent or advisor is linked to a client, this action does not automatically make them the primary levy contact for the client
- ✓ After successfully adding a client, a message is displayed to inform the agent or advisor how they can add themselves as primary levy contact (if they wish to do so)

The screenshot displays the user profile for 'Mr. Tax Agent' with an ACC number. A 'Manage portfolios' button is visible in the top right. Below the profile, there are tabs for 'Clients' and 'Organisation'. The 'Add new clients' section shows a green success message: 'The client account(s) was linked successfully'. A dashed blue box highlights an information message that reads: 'If you'd like to receive all future levy correspondence, including invoices, on behalf of your client, you can do this by adding yourself as the primary levy contact. You can do this in two ways: • Go to the Contact Details page of the account • Go to your client list and select the client you'd like to be the primary contact for'. Below this, a section titled 'Newly added client accounts' shows 'ACC Number: A[redacted]B' and 'Client Name: Mr. Winnie S Pooh'. To the right, a panel titled 'Add new clients to selected portfolios' has a checked checkbox for 'Master Portfolio' and a 'Finished' button.

# Other primary levy contact features in MyACC for Business

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- When unlinking a client
  - ✓ When an agent or advisor unlinks a client, and they are the primary contact, this action will automatically remove them as the primary contact for the account



# Contact us

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MyACC for Business live chat



[acc.co.nz](https://acc.co.nz)



0800 222 776



email [myaccforbusiness@acc.co.nz](mailto:myaccforbusiness@acc.co.nz)