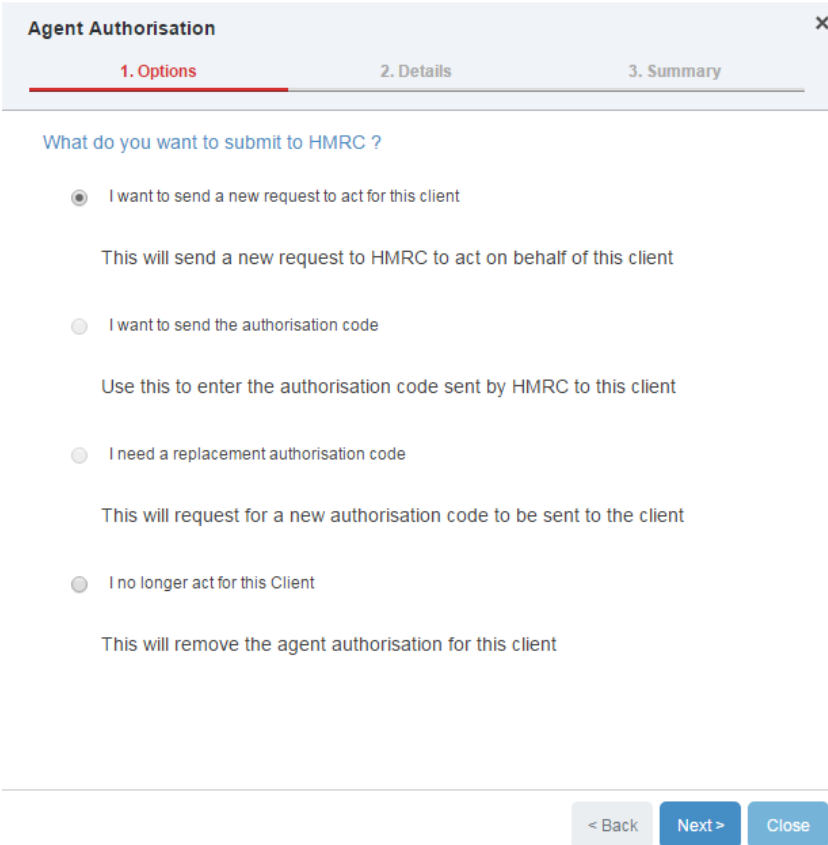


How to apply for Agent Authorisation (64-8)

Drummohr Cloud Suite does not produce a paper 64-8, instead it sends an electronic authorisation request to act on behalf of your client. You can do this as follows:

- 1) Select the client
- 2) Select the Details tab
- 3) Select the Tax Information tab
- 4) See Agent Authorisation section and click on Request Authorisation
- 5) In the next screen select option 1 (I want to send a new request to act for this client) and click on Next



The screenshot shows a web interface titled "Agent Authorisation" with a close button (X) in the top right corner. Below the title is a progress bar with three tabs: "1. Options" (highlighted in red), "2. Details", and "3. Summary". The main content area asks "What do you want to submit to HMRC ?" and lists four radio button options:

- ☒ I want to send a new request to act for this client
This will send a new request to HMRC to act on behalf of this client
- ☐ I want to send the authorisation code
Use this to enter the authorisation code sent by HMRC to this client
- ☐ I need a replacement authorisation code
This will request for a new authorisation code to be sent to the client
- ☐ I no longer act for this Client
This will remove the agent authorisation for this client

At the bottom right, there are three buttons: "< Back" (disabled), "Next >" (active), and "Close" (disabled).

- 6) In the Details screen Select Authorise for what service you would like to act for and click Next
- 7) Click submit and, if successful, your client will be sent an authorisation code for each service that they will need to give to you
- 8) Once the authorisation code has been passed to you by your client this is entered by repeating Steps 1 to 4 above and then selecting option 2 (I want to send the authorisation code) in order to complete the loop with HMRC