
What do I need for SBR to work within HandiTax?

[Click here to download the Dependency Installer.](#)

Microsoft Dependencies

With the new SBR process, HandiTax now requires any computer running HandiTax to have two 'dependencies' installed. If you have HandiTax running on a single computer or over a network with multiple PCs, every PC running HandiTax requires the following.

1. Microsoft Visual C++ 2013 Redistributable Package x86(32-bit)
2. Microsoft .NET Framework version 4.5 or later

The C++ 2013 Redistributable x86(32-bit) is viewable from the computers control panel in 'Programs and Features'. Look through the installed programs list to identify if you need to install this or not. If you already have the 64-bit version installed you need to install the x86(32-bit) version.

The .NET Framework is generally not viewable in the 'Programs and Features' installed list with Windows 10 and Windows 8.1, but can be seen in older version of Windows.

The CD 2016 V1.00 installer has an option to check if the PC has the required dependencies, and prompt you to install them if they do not. If using the CD installer, use the 'Workstation' option to install the dependencies on all workstations in your office.

Alternatively you can simply [download the dependency installer](#) we have created, which will check and install the dependencies where required. Do this on each of your computers that uses HandiTax.

[Click here to download the Dependency Installer.](#)

Windows Versions

Windows XP and older will not work with SBR because .NET Framework 4.5 cannot be installed.

AUSKey

AUSKey is part of the authentication method used to access SBR services.

Lodging returns, requesting reports and requesting prefill will require an authorised AUSKey as part of the SBR process.

HandiTax requires any user wanting SBR functionality to select their authorised credential within the AUSKey.

An AUSKey can have one or more credentials listed within it, and there can be many AUSKeys created for the business. The good news is that if you currently access the portal then you already have an AUSKey installed.

For further information about registering, creating, downloading and activating AUSKeys please visit the following websites -:

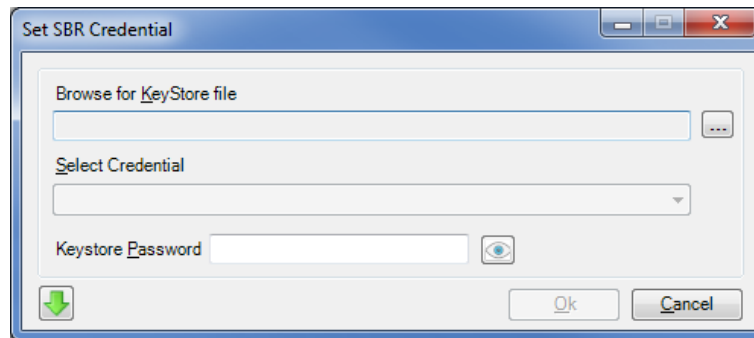
<https://abr.gov.au/AUSKey/>

<http://www.sbr.gov.au/about-sbr/publications-and-resources/learning-modules/auskey>

https://www.ato.gov.au/General/Online-services/In-detail/Transact-Online/Using-Access-Manager/?page=1#Tax_and_BAS_agents

Aligning your AUSkey with HandiTax

From the **Lodgment** menu, click **Set SBR AUSkey Credentials**.



An AUSKey file is named Keystore.xml. Click on the ellipses button to browse for the keystore.xml file location. Generally, but not always, the location where it has been installed to is C:\Users\USERNAME\AppData\Roaming\AUSKey (the reference to USERNAME is the logon username you enter to access the PC).

Alternatively, you can search for the file by opening Windows Explorer and typing 'keystore.xml' into the search bar.

Further information on locating your keystore.xml file can be found here -:

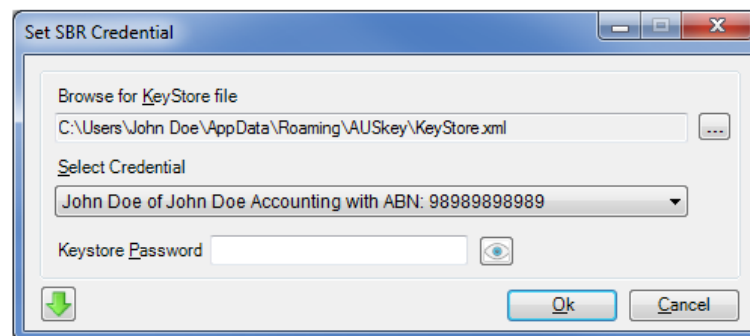
<https://abr.gov.au/AUSkey/Help-and-support/Managing-AUSkey-troubleshooting/Back-up-your-AUSkey/>

Once you have located and chosen your keystore.xml file, you will be able to select a credential in the 'Select Credential' list.

You will need to provide security by entering the password for the credential. This password should be the same as that you use when accessing the portal from the computer you are sitting at. It's important to note that if you have set up different AUSkeys on different computers, each separately installed AUSkey on each separate PC could have a different password that was initially set up when the AUSkey was installed.

If you can't remember the password for the AUSKey, further information can be found here -:

<https://abr.gov.au/AUSkey/Help-and-support/Managing-AUSkey-troubleshooting/Forgotten-password/>



AUSkey Authorisation

Your AUSkey will have credentials assigned within it.

Each credential must be authorised to perform actions via SBR.

Failure to set the correct permissions for the credential will result in authorisation errors being generated by the ATO when attempting a certain SBR function. For example, you may not have authorised a credential to lodge Individual income tax returns. Even though via ELS there was no problem lodging individual income tax returns, when doing it via SBR the ATO rejects the lodging attempt.

In order to authorise credentials you must log on to the portal.

Once in the portal you need to select **Access and permissions** from the left hand menu.

NOTE: If you do not see **Access and permissions** you have not logged onto the portal as an administrator. Only administrators can set the permissions for the credentials.

A list of individuals will appear. Choose a credential by clicking on the name in the list.

You should now see a list of what this credential can and cannot do. Check the boxes you want this credential to be able to access.

NOTE: There are two sections here, **Business** and **Client**. In order to lodge all form types via SBR, both sections need to be authorised.

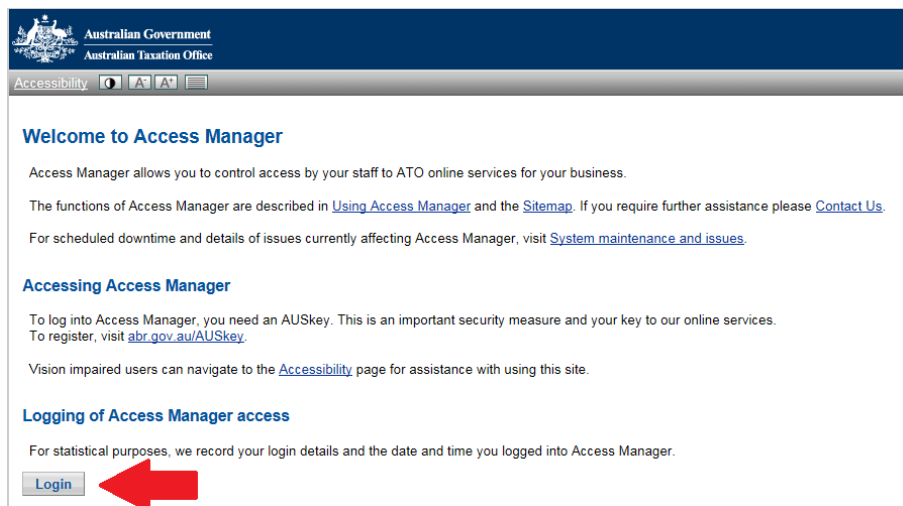
AUSkey Permission Walkthrough

Step One – Log into the portal.

Step Two – Click **Access Manager** from the left hand column.

The screenshot shows the Australian Taxation Office Tax Agent Portal. The left-hand navigation menu includes: Start here, To do today, Home, Favourites, Your details, Your dealings, Reports, Correspondence, Your clients, Information, Directory, Add client, Mail, Inbox, New message, Sent, Online forms, Online tools and calculators, Access manager (highlighted in blue), File transfer, Lodge file, and File status. The main content area displays: Welcome John Doe, Commissioner's message, a message from Chris Jordan AO, Commissioner of Taxation, and a Mail section showing 0 new messages. A red arrow points to the 'Access manager' link in the left-hand menu. Below the 'Quick links' section, there are links for 'System maintenance', 'Tax Agent Portal', and 'Tax Agent Portal Dashboard'.

Step 3 – Login to Access Manager.



Australian Government
Australian Taxation Office

Accessibility

Welcome to Access Manager

Access Manager allows you to control access by your staff to ATO online services for your business.

The functions of Access Manager are described in [Using Access Manager](#) and the [Sitemap](#). If you require further assistance please [Contact Us](#).

For scheduled downtime and details of issues currently affecting Access Manager, visit [System maintenance and issues](#).

Accessing Access Manager

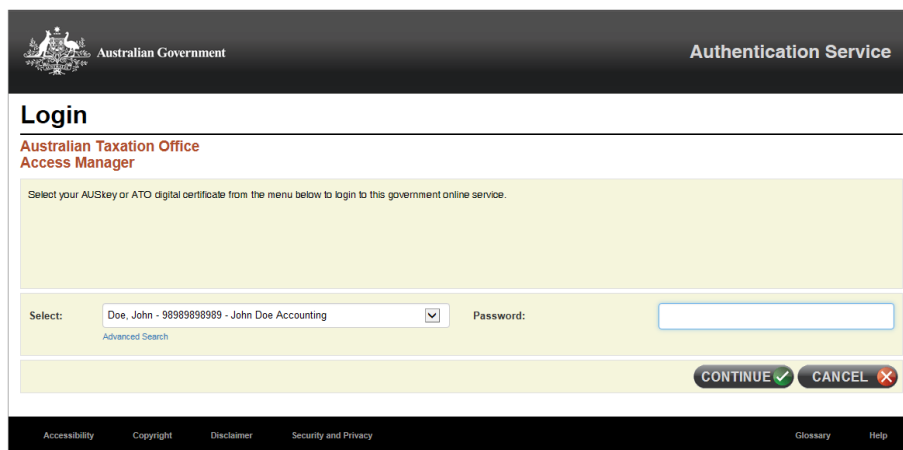
To log into Access Manager, you need an AUSKey. This is an important security measure and your key to our online services. To register, visit abr.gov.au/AUSKey.

Vision impaired users can navigate to the [Accessibility](#) page for assistance with using this site.

Logging of Access Manager access

For statistical purposes, we record your login details and the date and time you logged into Access Manager.

[Login](#)



Australian Government
Authentication Service

Login

Australian Taxation Office
Access Manager

Select your AUSKey or ATO digital certificate from the menu below to login to this government online service.

Select: Password:

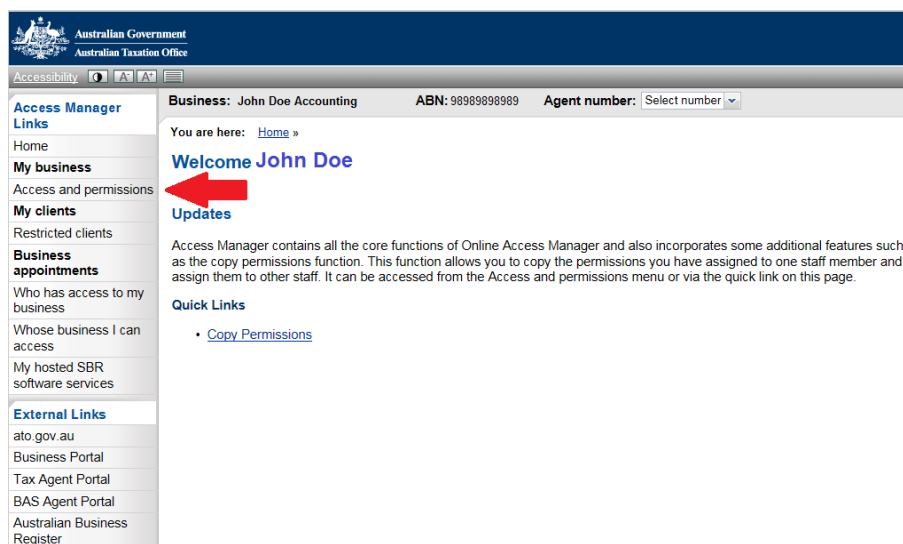
[Advanced Search](#)

[CONTINUE](#) [CANCEL](#)

Accessibility Copyright Disclaimer Security and Privacy Glossary Help

Step 4 – Choose **Access and permissions** from the left hand column.

NOTE: if you do not see **Access and permissions** you are not logged in as an administrator.



Australian Government
Australian Taxation Office

Accessibility

Business: John Doe Accounting ABN: 98989898989 Agent number:

You are here: [Home](#)

Welcome John Doe

Updates

Access Manager contains all the core functions of Online Access Manager and also incorporates some additional features such as the copy permissions function. This function allows you to copy the permissions you have assigned to one staff member and assign them to other staff. It can be accessed from the Access and permissions menu or via the quick link on this page.

Quick Links

- [Copy Permissions](#)

Access Manager Links

- Home
- My business
- Access and permissions
- My clients
- Restricted clients
- Business appointments
- Who has access to my business
- Whose business I can access
- My hosted SBR software services
- External Links
- ato.gov.au
- Business Portal
- Tax Agent Portal
- BAS Agent Portal
- Australian Business Register

Step 5 – From the list, choose the credential that requires permissions updated.

Business: John Doe Accounting **ABN:** 989898989 **Agent number:** Select number ...

You are here: [Home](#) > [Access and permissions](#)

Access and permissions

< [Home](#) > [Past credential holders history](#) > [Current credential holder access report for all agent numbers](#) > [Copy permissions](#) > [Tax practitioner access](#) >

The following table contains a list of all credential holders associated with the specified Agent number. Select a credential holder's name to view or modify their access and permissions.

Name search

Surname: and/or First name:

Name	Credential type	Can manage permissions?	User account status	Last accessed	Last updated
Jane_Mary	User	No	Active	22 Apr 2016	28 Jun 2013
Doe_John	Administrator	Yes	Active	28 Apr 2016	17 Mar 2016
DOE_JOHN	User	No	Active	14 Apr 2011	14 Mar 2011
Smith_Sarah	Administrator	Yes	Active	13 Aug 2015	22 Mar 2012
Rakeesh_Sunary	User	No	Active	23 May 2012	20 Jun 2011

Step 6 - Select the relevant permissions.

Permissions

The business tab displays the permissions that can be assigned to a credential holder for your business and the client tab displays the permissions that can be assigned for your clients. To modify a user's permissions, select or de-select the check boxes next to the appropriate permissions. The changes will be submitted when you select 'Save'.

Business **Client**

Access to all online functionality (including future enhancements) for my clients

Restricted Clients All

Access to all restricted clients

Client Details All

View client registration details

Update client registration details

View client

Cancel client registration details

Add / Delete client

Add / Update financial institution details

View account details

Submit payment plan

Submit refund request

Submit transfer request

View client reports

View Prepare Lodge Revise

ATO Transactions All

Activity statements

Annual investment income report

Closely held trust beneficiary report

Consolidated group notification

Direct debit

FBT return

Foreign account tax compliance act

Individual income tax return

Non-individual income tax return

PAYG payment summary

Private ruling application

Quarterly TFN/ABN report

SMSF annual return

Super ENCC and RENC election form

Taxable payments annual report

TFN declaration

Administration All

View and action own mail

Step 7 – Check both **Business** and **Client** tabs have the correct permission set.

Step 8 – 'Save' the changes in the bottom right hand corner.

Proxy Server and Network Firewall Information

This section provides a general overview of the proxy or firewall configuration required to enable SBR lodgments from your workstation.

While we are unable to offer networking advice relating to your specific setup, below are general guidelines to assist with the configuration of your proxy server and software firewall.

HandiTax must communicate with the ATO's servers in order to lodge SBR.

You may need to create an exception rule to allow the following ATO domains to bypass the proxy server:

- *.sbr.gov.au
- *.authentication.business.gov.au

Sometimes firewalls may automatically block applications from accessing the Internet.

In which case, you have to allow the following applications in the firewall.

- Ht15.exe
- Ht16.exe
- Ht15sql.exe
- Ht16sql.exe
- javawforAUSkey_abrkeymgmt.exe

If, after allowing these exceptions through your network, you are still unable to connect to the ATO, you should request your Network Administrator to monitor your network traffic logs and allow the required blocked content through your Proxy Server or Firewall.