

E-File

IR 798
October 2005



Information about
using E-File



Inland Revenue
Te Tari Taake

Welcome to E-File

E-File lets you file your clients' tax returns directly from your PC to Inland Revenue's mainframe computer, using an internet connection.

This leaflet outlines the E-File system and tells you what to do if you're interested in using it.

E-File or paper?

- With E-File you can electronically send us most tax returns (IR 3, IR 3NR, IR 4, IR 4J, IR 6, IR 7, IR 8, IR 9, IR 526 and GST 101) and attachments, as well as correspondence.

You don't need to send us paper tax returns, as we can legally assess electronic data as though it is a paper return. You or your clients must still sign a hard copy printout of the return, which must be kept for seven years as a legal requirement.

- The main benefit of using E-File is speed. We receive your clients' returns straightaway and we don't need to enter any details manually. This means faster processing and faster release of any refund.
- E-File software has some built-in checks that help reduce errors and allow smoother processing.
- You can view the notices of assessment electronically before paper copies are mailed out.

What else does E-File do?

- You can request the latest information on your client list and update it at any time.
- E-File gives you greater control over your client list and makes it easier and quicker to update it.
- E-File lets you check your return filing percentages and monitor your progress towards extension-of-time targets.
- You can request Inland Revenue stationery items electronically.

E-File security

The E-File system has a high level of security, designed to protect the confidentiality of your clients' data.

Each E-File user has an encryption key and a software password that can be changed at any time.

You will need

- an MS DOS compatible computer
- a printer
- an Inland Revenue certified E-File software package
- a modem
- an internet connection.

If you use tax preparation software, you need to make sure that any E-File component has our certification. A list of approved software developers is available from the E-File support team, the *Tax Agents' CD Rom* and our website www.ird.govt.nz/taxagents/working-ird/e-file/ta-e-file-starting.html

Getting started

Check the list to make sure you have the hardware, software and connection that you need. You may find it helpful to talk to other tax agents who use E-File or ask software developers for information.

If you decide you want to use E-File, fill in the enrolment form attached to this leaflet and send it to the E-File support team (see contact details below).

It's very important that you read and agree to the terms of reference on the back of this leaflet. Please keep this leaflet so you have a record of the requirements for using E-File.

When we've registered you, we'll send you your encryption key.

We do not charge you to register or use E-File.

For more help

Your software supplier is responsible for training and support in using the software package. You can find more information about E-File on our website www.ird.govt.nz/taxagents/working-ird/e-file

The E-File support team can help you while you're getting set up for E-File. You can contact them at

E-File support team
PO Box 2198
Wellington

Fax 04 890 4714
Phone 0800 433 4533

E-File terms of reference

Please read these terms of reference before signing the *E-File enrolment (IR 798)* form.

Your obligations

- Keep these items secure:
 - your encryption key
 - your E-File IRD number and location number.

- Contact the E-File support team immediately if:
 - you cease your business
 - you want to withdraw from the E-File system.

- You must successfully transmit at least two test returns by E-File and send a copy of the confirmation reports to Inland Revenue (we will send more details about this when we accept your enrolment).

- Send an *Accounts information (IR 10)* form with all tax returns that have business accounts. If you don't, you will have breached the terms of reference and may not be able to use the E-File service.

- Supply your working papers and return data to Inland Revenue on request.

- Keep the hard copy printout of each E-File return transmitted, signed by you or your client, for the required seven years.

- You must hold a signed authority from your client, which allows you or your agency to discuss with Inland Revenue any matter relating to any tax type for which you or your agency is linked, unless you are acting only as a bureau.

Inland Revenue's obligations

- We will specify the return types and attachments to be sent by E-File through the third party specifications.
- When we receive a copy of the confirmation reports for the test returns, we will write and confirm your access to the E-File system.
- If the E-File system cannot be used, for maintenance or any other reason, we will let you know in advance and keep the closure as short as possible.
- We will update the terms of reference whenever necessary.

The E-File logo

E-File is a registered trademark and has its own logo.

When you begin sending returns through the E-File system, we will offer you the opportunity of signing the E-File logo contract which means you can advertise your participation in E-File.





1. Your business name

2. Your business IRD number
The number under which you currently file your clients' returns

3. Your business postal address
Street address or PO Box number

Suburb, Box, Lobby or RD Town or City

4. Number of returns you expect to send by E-File

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>IR 3</small>	<small>IR 3NR</small>	<small>IR 4</small>	<small>IR 4J</small>	<small>IR 6</small>	<small>IR 7</small>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<small>IR 8</small>	<small>IR 9</small>	<small>IR 526</small>	<small>GST 101</small>		

Total number of E-File clients
Total number of non E-File clients
Total number of clients

5. Contact person
Contact person's position or title
Contact numbers () ()
Business Fax
Email address

6. Name of the E-File software package you expect to use

Have you E-Filed previously? yes no
If yes, what IRD number did you E-File under?

7. Declaration

I have read and understood the E-File terms of reference and agree to fulfill my obligations as an E-File user

Name
Position or title
Signature / /
Date

Send this form to E-File support team, PO Box 2198, Wellington, or fax 04 890 4714