Navigational changes in myIR

Where it was	Where you go now	Description
Settings link	Manage my profile link	To edit your name/email address or to create new logons, manage access to the agency's own account. Alerts tab specific to your logon (unread web messages), view your activity
Correspondence tab>Messages	Manage my profile link>I want to>Communicating with IR: View messages and Send a message link	Send and view secure web messages for your logon. There will also be an alert in the alerts tab if there are any unread messages.
Settings>Manage client subscriptions	Intermediary centre> Manage subscriptions	To subscribe to clients and receive alerts for filing, paying and letters from IR
Customer tab	No longer applicable	There is no longer a workspace, you can access clients using Favourites and Alerts in the Intermediary centre or the enhanced search tool
Accounts tab	No longer applicable	There is no longer a workspace, you can access clients using Favourites, Alerts in the Intermediary centre or the enhanced search tool
Tax preparer tab	Intermediary centre link	To access agency and client functions that were on the Tax preparer tab
Correspondence tab >unread letters: View letters	Intermediary centre>View messages and View letters links or Intermediary centre> All client mail report	To view subscribed client letters, agency letters (if applicable) and web messages, including secure mail (view, reply, send)
Client>Correspondence tab> Unread letters: View letters	Client>I want to>View messages and View letters links	To see all letters from IR to the client/redirected to intermediary. View, reply, send secure web message
Submitted tab>Processed: View, more	Intermediary centre> Search submissions link	To see all draft, processing and processed submissions sent by your logon
Client>Submitted tab	Client>I want to>Search submissions link	To see all drafts (including draft returns saved by the client or any other agency logon), processing and processed submissions for this client

Where it was	Where you go now	Description
Tax preparer tab>Client access	Home>Search tab (IR logo to go home)	To find a linked client to access by IRD number, Customer Identifier or Name (new)
Client>Income tax tile>Account registration details>More>Additional client attributes	Client>Income tax panel> More…>View account registration details link	To find balance date, filing frequency, who mail is being issued to, whether they're a paper filer, refund bank account and customer type/sub type e.g. qualifying company, look through company
Client>Income tax tile>Periods tab>Select period link>more tab	Client> Income tax panel More…>Additional period details link>Period	For income tax to find Excess imputation, Losses to carry forward, EOT status, intention to use tax pooling and ICA closing balance for companies
Client>Income tax tile>View details>Click year 'Show history'	Client>Income tax panel More…>View provisional tax	To see current and previous provisional tax assessments and methods
Client>Income tax tile>Earning summary: View details>I want to… Print income details	Client>Income tax panel More…>Print proof of income or Print income details	To print income summary/income details (PDF)
Client>Income tax tile>Current income types>Manage	Client>Income tax panel>More...>My income sources	To manage income sources (add and remove)
Client Income tax tile>Earning summary: View details>I want to… Update investment percentage	Client>Income tax panel More…>Update investment percentage	To change the split of joint investment income eg. bank interest for joint accounts
Client>Account tile>Periods tab	Client>Account>Returns and transactions link	To see list of periods and links to file returns
Client>Account>Periods tab>Period date link>Transaction details	Client>Account panel: Returns and transactions>Period date link	To see transactions and navigate between transaction period displays
Client>Account>Periods tab>Period date link>I want to..>File or amend return	Client>Account panel: More..>File or amend return	View or amend already filed returns. You can also file returns and view overdue returns.
How to file a previous months Employment information return	Client>Account panel:More..File or amend return	To find file return function for previous periods. The account panel defaults to the current month.

What's New		
New	Intermediary centre	Access to agency and client functions. From the home screen or within a client – top right corner.
New	Last viewed	Quick access back into the last client you were in
New	Favourites tab	Allows you to easily access up to 50 clients you have saved as a favourite.
New	Favourites tab>Manage favourites	Allows you to add/remove clients from your favourites list. If you're not already subscribed to the clients, you'll need to access the client in that session first for them to show on the list.
New	Search tab	Quick access to your clients from the homepage. You can search using your client's name. At ID type click on the arrow to change search from IRD no to name or customer identifier.
New	History tab	Quick access to the last 10 clients you have accessed
New	Intermediary centre>Alerts tab	Consolidated view of alerts for all subscribed clients and accounts.
New	Intermediary centre>Alerts tab> dismissed alerts	Consolidated view of alerts dismissed for subscribed clients. Can be accessed and restored.
New	Client>Alerts tab	Alerts will show on each client even if you are not subscribed.
New	Client> Alerts tab> View dismissed alerts	Dismissed alerts on each client can be accessed and restored.
Account Summary page	Account panels	Mini dashboards providing upfront information about the account, alerts for each account type and quick links.