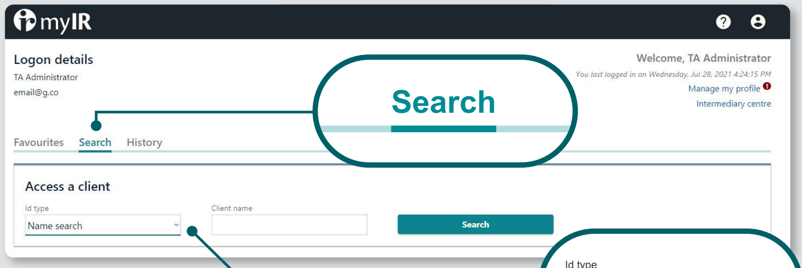
Changes to myIR

Here's an overview of the myIR changes you'll be seeing from today.

This information will help you navigate your way around following the changes we've just made.

Accessing a client

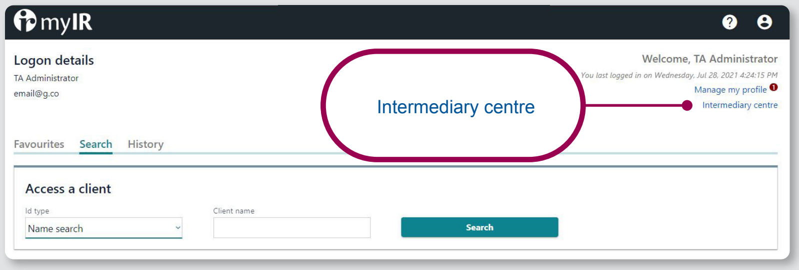
Quick access to your clients is now under the 'Search' tab on the homepage instead of within the Tax preparer tab. There is now a name search option so you can search using your client's name. This will look for the best possible match to what you've entered, and it will look across the client's name history as well as their preferred name.



Accessing a client.

GST and provisional tax due date extended to 4 November

We understand with our system shut down that businesses may struggle to file and pay GST and provisional tax by 28 October. Therefore, the Government has extended the due date to 4 November to file and pay. Please note that myIR will still show the 28 October due date.

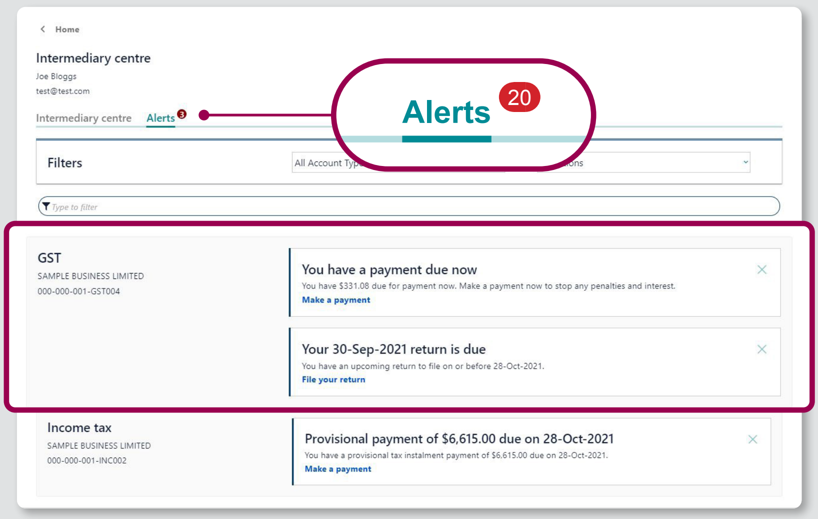


From the homepage, go into the Intermediary centre (top right).

FILING GST

To file a client's GST return you need to access the client – this can be done a number of different ways. You can look them up by name or IRD number in the search tool on your homepage. If you're subscribed to a client's GST already, you can access them from the Alerts section in the Intermediary centre and if you have already set them as a favourite (see below), you can access them from the Favourites tab.

Once you've opened the clients account, you'll see a GST panel with an alert on it. You can either click on the alert and find the one relating to that GST period or you can click on the Returns and transactions link from the GST panel to see the Period view, with the relevant 'File return' link.



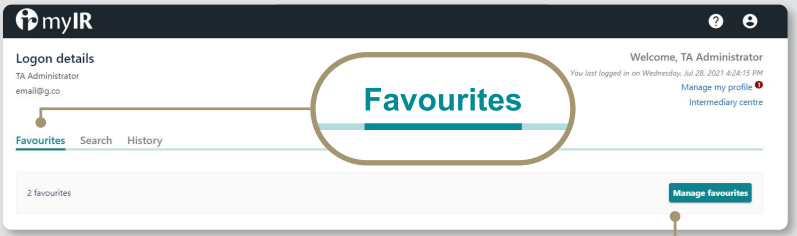
Once in the Intermediary centre, go into Alerts where you'll see the GST alerts that you need to action.

Changes to myIR

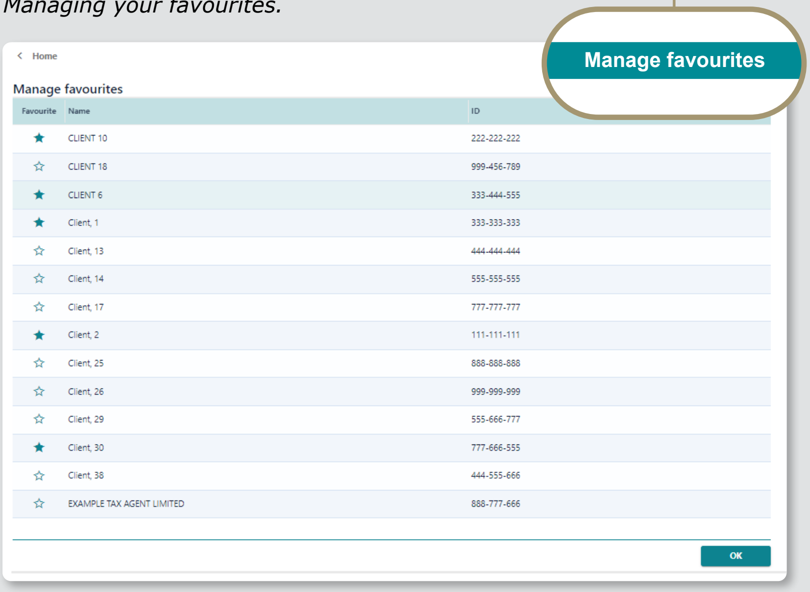
Setting up favourites – not just a one-off task

A new 'Favourites' tab allows you to prioritise clients for easy access. Clicking on 'Manage favourites' allows you to add/remove clients from your Favourites list, up to a limit of 50. This tab shows even if you haven't selected any favourites.

To add clients to Favourites, you'll need to go to Manage favourites. If you're currently subscribed to clients these will automatically appear under the Manage favourites list. You'll just need to 'star' them and then they'll show under your Favourites tab. If you aren't subscribed to any clients and you'd like for them to show under the Favourites tab, you'll need to search for their account under the Search tab, select their account and add them as a favourite from there. You'll be able to have up to 50 favourite clients, which will show in stacked panels displaying the client's name and IRD number, along with any relevant alerts.



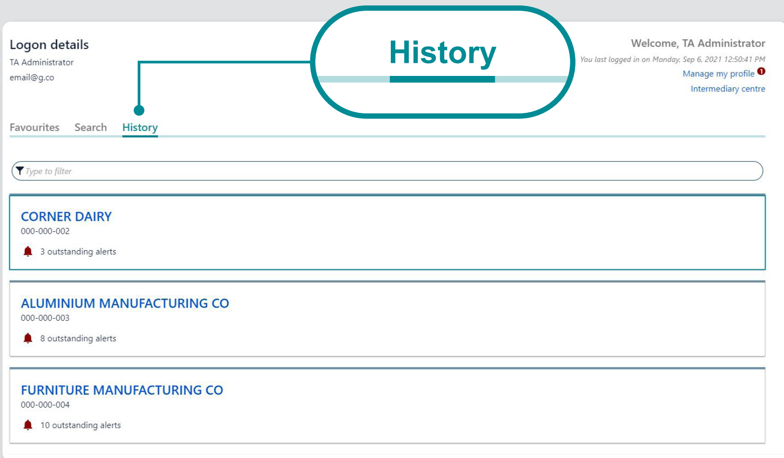
Managing your favourites.



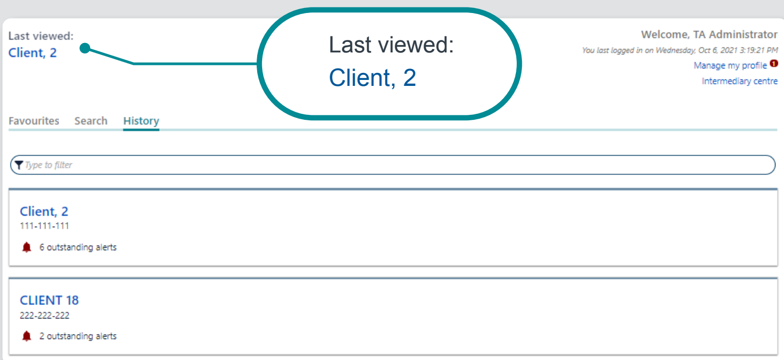
History tab and Last viewed

Once you've accessed two client accounts, the History tab will appear on your homepage. This will hold up to the last ten clients accessed by your logon and will be visible the next time you log in.

'Last viewed' will appear once an account has been accessed in the session, this makes it easy to go back into a client. This will refresh each time you log in.



On the homepage, go into the History tab.



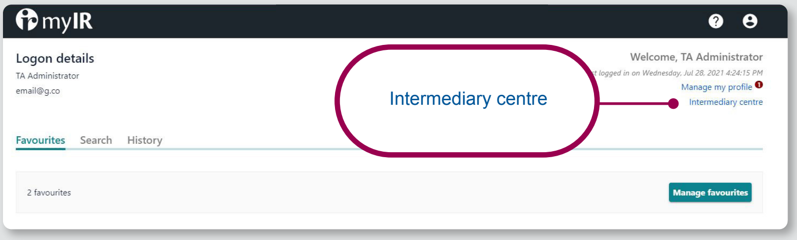
In here you'll see History along with the Last viewed clients.

Changes to myIR

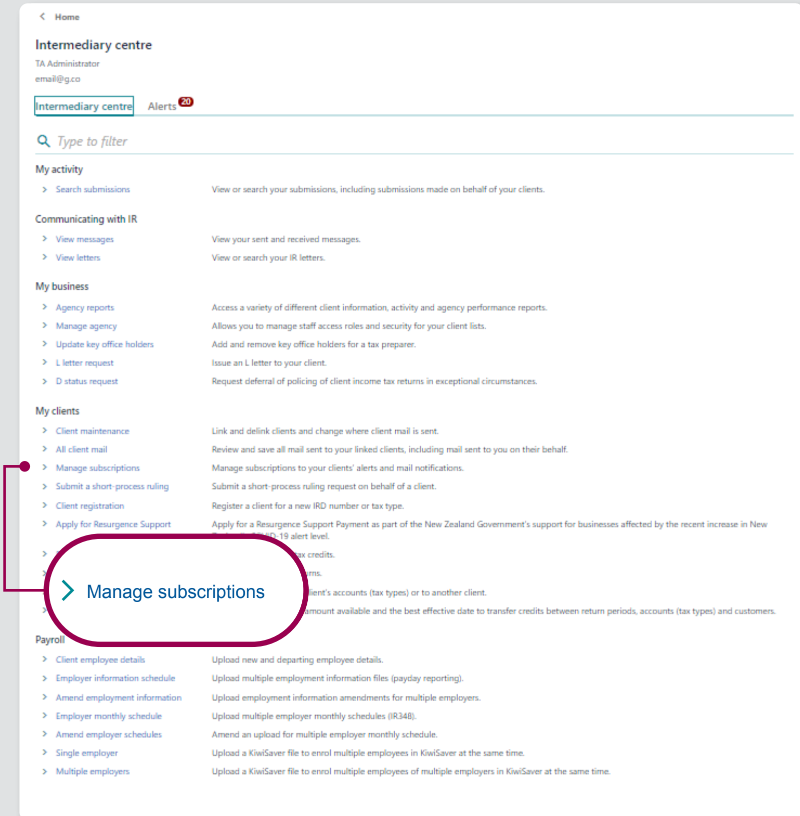
Finding intermediary information

The 'Intermediary centre' provides access to the links and functions previously found in the Tax preparer tab. There are some changes to the order and categorisation of functions in the Intermediary centre, for example 'All Client Mail' has moved up in the list.

'Alerts' within the Intermediary centre relate to alerts for all of your subscribed clients and accounts. The filter function now highlights the best match for the search as well as showing other possible matches.



From the homepage, you can access the Intermediary centre at the top right hand.

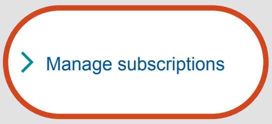


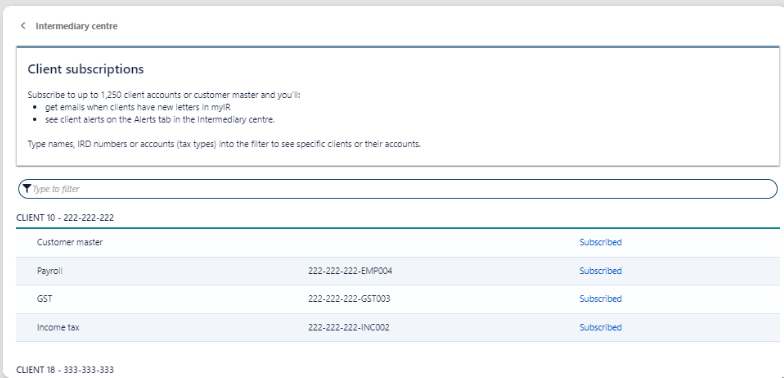
Intermediary centre menu.

Client subscriptions

Subscriptions now also include Alerts. The number of subscriptions to client accounts, (or the 'customer master' for tax agents) will be capped at 1,250. The Manage subscriptions link has moved to the Intermediary centre. The 'subscribe all' and 'unsubscribe all' buttons have been removed. Tip: For all intermediaries, even those with below 1,250, this is a good time for you to do a stocktake on your subscriptions.

THE 'MANAGE SUBSCRIPTIONS' LINK HAS MOVED TO THE INTERMEDIARY CENTRE





Client subscriptions (accessed through the Intermediary centre).

Changes to myIR

Alerts

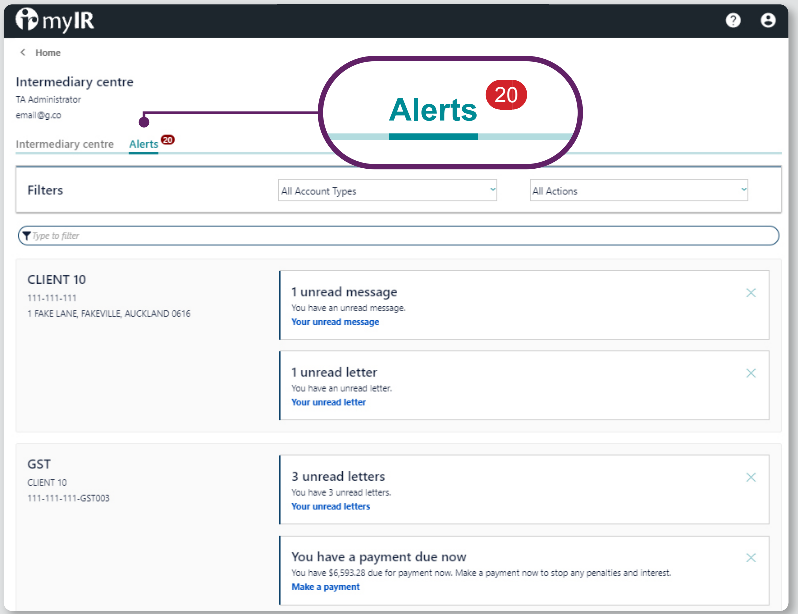
Alerts have changed, and now only appear when there is action required.

Alerts are specific to your logon – if you dismiss them, they will still show for other people including the client. Additionally, multiple unread messages will only show as 1 alert.

You can access a consolidated view of alerts within the Intermediary centre, across all your subscribed clients and accounts, along with those that you are a nominated person for or have redeemed token access for prior to the upgrade.

Alerts will also show on each client, even if you're not subscribed to them. Whenever you go into a client in myIR, or look at clients you've set up as a favourite, all relevant alerts on the client will show, unless you dismiss them or action them.

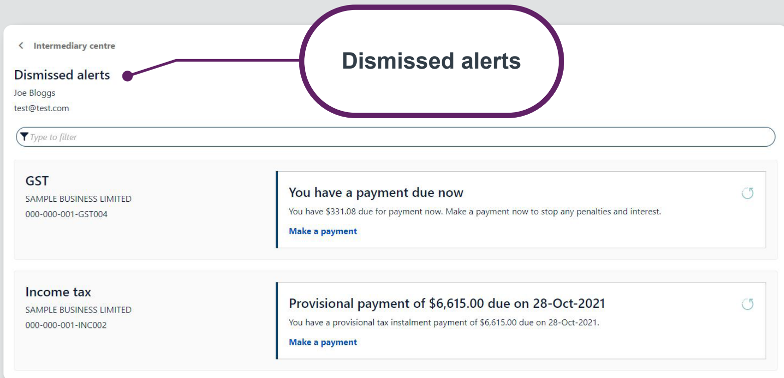
Alerts will be sorted alphabetically by 1. Client 2. Account, 3. Due date. Alerts for non-subscribed clients can be viewed within the client's account. Alerts specific to your logon can be found in the 'Manage my profile' link.



All client alerts.

DISMISSED ALERTS

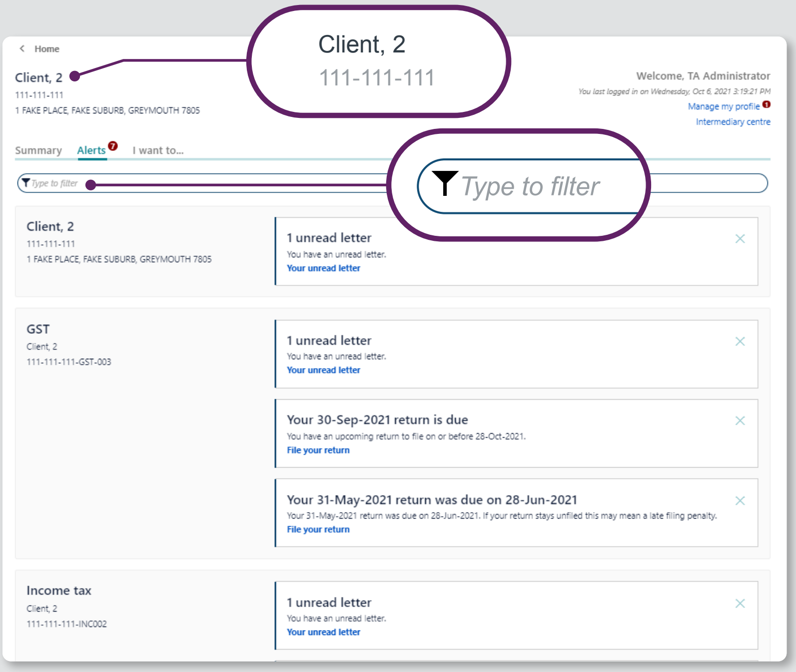
All alerts can be dismissed. If the action has not been completed and you haven't dismissed the alert then it will remain in the alerts section until it is completed. If you dismiss the alert without actioning it, then it will reoccur. For payment alerts this will be every day once they are overdue. While return alerts will reoccur at ten days prior to the due date, and then every day once they are overdue. Dismissed alerts can be accessed and restored from the 'View dismissed alerts' link.



Changes to myIR

FILTERING ALERTS

Filter options within Alerts enables you to focus on relevant information. Filter options include available products (eg GST, income tax) or available alert types within the list (eg File your return, Balance due, Letters to read). Dismissed alerts will not be included when filtering. For example, filtering by just the 'File your return' option will show the alerts for returns that need to be filed across subscribed clients and accounts. Filtering by just the 'Balance due' option will show the alerts for balances that need to be paid across subscribed clients and accounts.

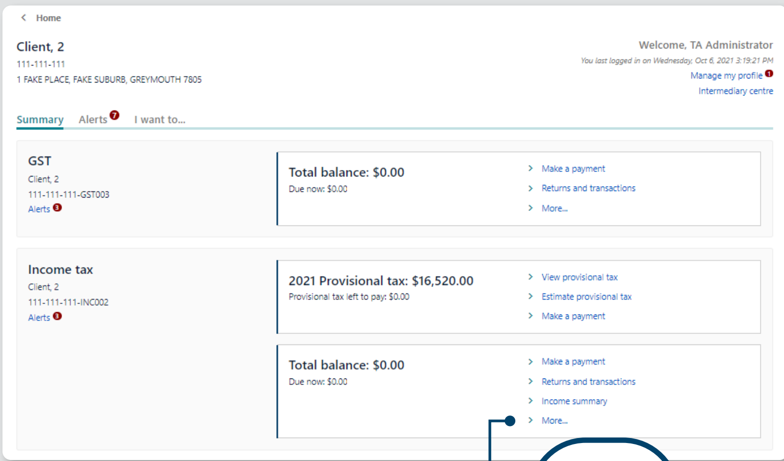


Specific client alerts.

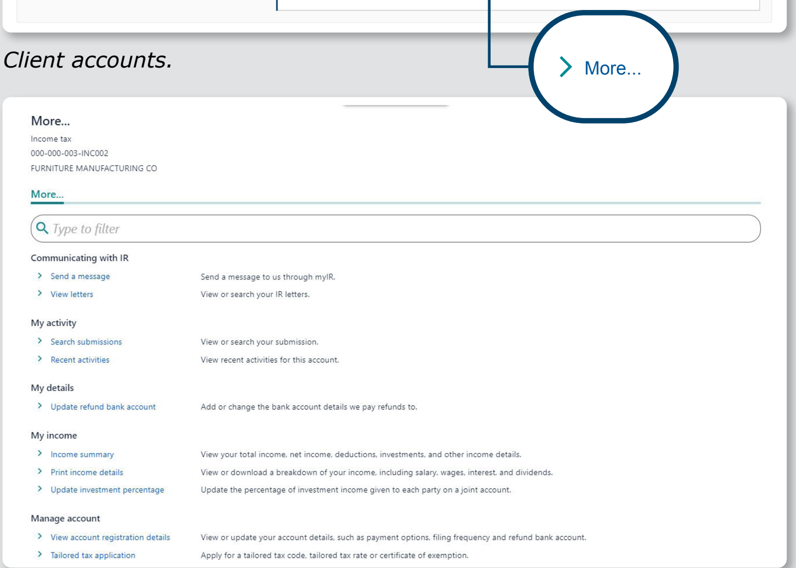
Client accounts

Once you've accessed a client, you'll see the 'Summary' screen showing the account panels and sub-panels you have access to. There's no longer any need to click into an account as account panels will provide upfront information about the account, the number of alerts for each account type, and quick links. Account panels have sub-panels that provide more information about the account, including account balances, due now balances, and links to account-related tasks or information.

Functions that are not visible as a link in the account panel will be available under the 'More...' link. These will still be account specific meaning you need to click the 'More...' on the income tax account panel to see more options available for that account.



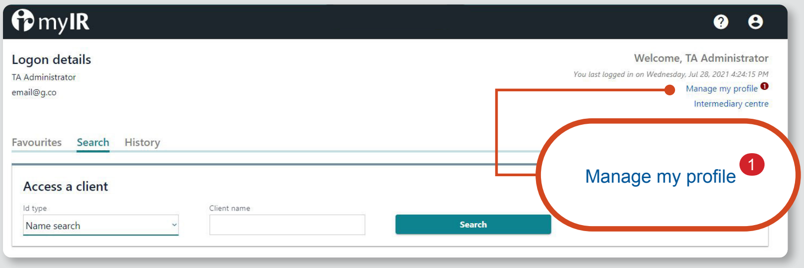
Client accounts.

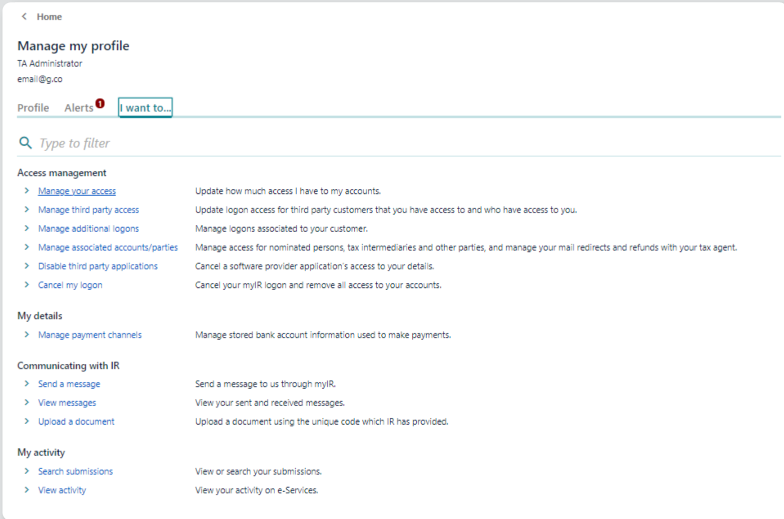


'More' menu when you're in INC tax type.

Managing your logon profile

The 'I want to…' menu is where you can manage access, payment channels, messages, logon activity, and view submissions. You can also check and update your profile information here. The Alerts tab within Manage my profile shows alerts that are specific to your logon – multiple unread messages will only show as 1 alert.





Managing your logon profile.