Pomyle Changes to myle

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.

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.

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.



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



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

Pomyle Changes to myle

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.

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*	Client, 2	111-111-111	
☆	Client, 25	888-888	
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📮 3 ou	itstanding alerts		

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.

FURNITURE MANUFACTURING CO

10 outstanding alerts

Last viewed: Client, 2	—	Last viewed: Client, 2	Welcome, TA Administrator You last lagged in on Wednesday, Okt & 2021 2 1921 DM Manage my profile O Intermediary centre
Favourites Search History)
6 outstanding alerts			
CLIENT 18 222-222-222 2 outstanding alerts			

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

Changes to mylR

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.

r my IR	Ø 8
Logon details TA Administrator email@g.co	Welcome, TA Administrator Vageed in an Wednesday, M23, S214 S24 Manage my profile Intermediary centre
Favourites Search History	
2 favourites	Manage favourites

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

< Home	
Intermediary centre	
TA Administrator	
emai@g.co	
Intermediary centre Alerts	
,	
Q Type to filter	
My activity	
> Search submissions	View or search your submissions, including submissions made on behalf of your clients.
Communicating with IR	
View messages	View your sent and received messages.
> View letters	View or search your IR letters.
My business	
> Agency reports	Access a variety of different client information, activity and agency performance reports.
Manage agency	Allows you to manage staff access roles and security for your client lists.
> Update key office holders	Add and remove key office holders for a tax preparer.
> Lletter request	Issue an L letter to your client.
 D status request 	Request deferral of policing of client income tax returns in exceptional circumstances.
My clients	
Client maintenance	Link and delink clients and change where client mail is sent.
> All client mail	Review and save all mail sent to your linked clients, including mail sent to you on their behalf.
Manage subscriptions	Manage subscriptions to your clients' alerts and mail notifications.
 Submit a short-process ruling 	Submit a short-process ruling request on behalf of a client.
Client registration	Register a client for a new IRD number or tax type.
> Apply for Resurgence Support	Apply for a Resurgence Support Payment as part of the New Zealand Government's support for businesses affected by the recent increase in New
>	ax credits.
	ms.
Manage subs	Scriptions lient's accounts (tax types) or to another client.
>	amount available and the best effective date to transfer credits between return periods, accounts (tax types) and customers
Dauroll	
 Client employee details 	Upload new and departing employee details.
> Employer information schedule	Upload multiple employment information files (payday reporting).
	Upload employment information amendments for multiple employers.
Amend employment information	
Amend employment information Employer monthly schedule	Upload multiple employer monthly schedules (IR348).
Amend employment information Employer monthly schedule Amend employer schedules	Upload multiple employer monthly schedules (IR348). Amend an upload for multiple employer monthly schedule.
Amend employment information Employer monthly schedule Amend employer schedules Single employer	Upload multiple employer monthly schedules (RMA). Amered an upload for multiple employer monthly schedule. Upload a Konikaer Re to enrol multiple employees in Konikaeve at the same time.

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**

>	Manage subscriptions
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Intermediary centre		
Client subscriptions		
Subscribe to up to 1,250 client accounts or customer master and you'll get emails when clients have new letters in my/R see client alerts on the Alerts tab in the Intermediary centre.	:	
Type names, IRD numbers or accounts (tax types) into the filter to see :	specific clients or their accounts.	
Type to filter		
JENT 10 - 222-222-222		
Customer master		Subscribed
Payroll	222-222-EMP004	Subscribed
GST	222-222-GST003	Subscribed
Income tax	222-222-222-INC002	Subscribed

CLIENT 18 - 333-333-333

Client subscriptions (accessed through the Intermediary centre).

Changes to mylR

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.

Home		
Administrator Mal@g.co Netmediary centre	Alerts 20	
Filters	All Account Types ~ All Actions	~
Type to filter		
CLIENT 10 111-111-111 1 FAKE LANE, FAKEVILLE, AUCKLAND 0616	1 unread message You have an unread message. Your unread message	×
	1 unread letter You have an unread letter. Your unread letter	×
GST CUENT 10 111-111-111-GST003	3 unread letters You have 3 unread letters. Your unread letters	×
	You have a payment due now You have \$6593.28 due for payment now. Make a payment now to stop any penalties and interest.	×

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.

Pomyle Changes to myle

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.

Home	Client, 2	
lient, 2	111-111-111 Welcome, TA Admi	inistra
1-111-111	You last logged in on Wednesdoy. Oct 6, 202 Manage m	1 3:19:2 ny profi
ARE PEACE, TARE SUBORD, GRETWOOTH 7005	Internet	diary ce
ummary Alerts I want to		
Type to filter	Tuno to filtor	
Type to June		
Client, 2		
111-111-111	1 unread letter	×
1 FAKE PLACE, FAKE SUBURB, GREYMOUTH 7805	Your unread letter	
GST		
Client, 2	1 unread letter	×
111-111-111-GST-003	Your unread letter	
	Your 30-Sen-2021 return is due	~
	You have an upcoming return to file on or before 28-Oct-2021.	
	File your return	
	Your 21 May 2021 return was due on 28 Jun 2021	
	Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfied this may mean a late filing penalty. File your return	
Income tax	4 month bits	
Client, 2	i unread letter You have an unread letter.	×
111-111-111-INC002	Your unread letter	

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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.

Home		
lient, 2		Welcome, TA Administrator
1-111-111		You last logged in on Wednesday, Oct 6, 2021 3:19:21 PM Manage my profile 9
FAKE PLACE, FAKE SUBURB, GREYMOUTH	7805	Intermediary centre
ummary Alerts 🕫 I want to	-	
GST	Total balance: \$0.00	> Make a payment
Client, 2	Due now: \$0.00	> Returns and transactions
Alerts 0		> More
Income tax		
Client, 2	2021 Provisional tax: \$16,520.00	 View provisional tax Entire tax
111-111-111-INC002	Provisional tax left to pay: \$0.00	Estimate provisional tax
Alerts 🔍		> Make a payment
	Total balance: \$0.00	> Make a payment
	Due now: \$0.00	> Returns and transactions
		Income summary
		- More
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ient accounts. Nore Income tax 000-000-001-NC002 RUBNITURE MANUFACTURING CO More © Type to filter Communicating with IR • Send a message • Weal effers My activity • Search submissions • Depart activities My details • Update refund bank account. My income	Send a message to us through myIR. View or search your IR letters. View or search your Submission. View recent activities for this account. Add or change the bank account details we pay refunds to.	More
ient accounts.	Send a message to us through mylR. View or search your IR letters. View or search your submission. View recent activities for this account. Add or change the bank account details we pay refunds to. View your total income. net income. deductions. investments. and other income	+ More
Definition of the second seco	Send a message to us through mylif. View or search your is letters. View or search your submission. View recent activities for this account. Add or change the bank account details we pay refunds to. View your total income, net income, deductions, investments, and other income. View of download a breakdown of your income, including salary, wages, interest	detaile.
İent accounts. Nore Noome tas: 000-000-000-INFC002 FURNITURE MANUFACTURING CO More	Send a message to us through myIR. View or search your submission. View recent activities for this account. Add or change the bank account details we pay refunds to. View your total income. net income. deductions, investments, and other income View of download a breakdown of your income, including salary, wages, interes Update the percentage of investment income given to each party on a joint das	e detalk. It and dividends. sourt.
İent accounts. Nore Income tas: 000-000-00002 EURITURE MANUFACTURING CO More	Send a message to us through mylit. View or search your submission. View or search your submission. View recent activities for this account. Add or change the bank account details we pay refunds to. View or download a breakdown of your income, including salary, wages, interess View or download a breakdown of your income, including salary, wages, interess View or download a breakdown of your income, including salary, wages, interess View or download a breakdown of your income, including salary, wages, interess View or download a breakdown of your income, including salary, wages interess	e detaik. It and dividents. It and dividents.
ient accounts.	Send a message to us through myIR. View or search your IR letters. View or search your Stabilistion. View resert activities for this account. Add or change the bank account details we pay refunds to. View or total income. net income. deductions, investments, and other income View or download a breakdown of your income. including salary, wages, interee Update the percentage of investment income given to each party on a joint acc View or update your account details, such as payment optons. filing frequency:	e details. It and dividends. It and dividends.

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

Changes to mylR

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.