



Getting ready: Setting up your New Zealand foreign trust's myIR

Setting up NZFTs in existence before 1 March 2021



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Greetings everyone and welcome to this webinar.

- My name is Rata Kamau and I'm a Transformation Account Manager at Inland Revenue working with Industry Associations, Professional bodies and Iwi across New Zealand.
- And my Name is Anil Srinivasa and I'm also an account manager at Inland Revenue working with the financial sector.

In this webinar we're going to step you through some of the upcoming changes for New Zealand foreign trusts. It is primarily aimed at trustees and trustee companies of trusts registered before 1 March this year, and impacted tax agents.

Purpose of this webinar is to:

- Remind you what's changing and when
- Explain what you need to do to get ready
- Confirm what IR will do on your behalf
- Step you through how to get access on 1 March

Further NZFT webinars: www.ird.govt.nz/webinars

Find out more: www.ird.govt.nz/foreign-trust-changes

Questions prior to 1 March 2021: nzforeigntrusts@ird.govt.nz



Over the last four years we have been implementing our business transformation. As well as a large computer system upgrade, we've made changes to policy, legislation and business processes, along with the design and structure of our organisation. It's about simplifying how we deliver services to make tax and social policy fit seamlessly into people's lives.

We are now in the final phase which includes moving New Zealand foreign trusts into our new system.

The purpose of this webinar is to:

- Remind you what's changing and when
- Explain what you need to do to get ready
- Confirm what IR will do on your behalf
- Step you through how to get access from 1 March

We've included some screen shots to help guide you.

To find out how to manage your account in myIR from 1 March 2021 once you're set up, see our webinar: *Managing your New Zealand foreign trust myIR account* You'll find this on our website.

To keep up to date with the changes you can also visit our website at www.ird.govt.nz/foreign-trust-changes.

If you have any questions:

- Before 1 March, you can email nzforeigntrusts@ird.govt.nz.
- After 1 March, if you have any questions about a particular trust please send a web message from myIR. We will keep the NZ foreign trusts email address open for general NZFT queries.

From 1 March 2021 we are:

- ➔ **Moving to** digital channels for receiving, storing, managing and distributing information, and for receiving payments
- ➔ **Moving towards** greater automation and a customer self-service approach

To find out more about what's changing visit:
www.ird.govt.nz/foreign-trust-changes

You will be able to:

- Register and deregister online
- Manage your New Zealand foreign trust (FTR) account in myIR
- File your annual return via myIR
- View previously filed returns in myIR
- Communicate with us securely in myIR
- Choose from a number of online fee payment options
- Manage connected persons details in myIR

Registered tax agents will also be able to:

- Link and redirect mail to their clients' NZ foreign trust (FTR) account
- register an entity for FTR under the tax preparer tab in myIR

We've been in touch with you in recent months about what's changing. Here's a quick reminder.

From 1 March 2021, we're moving away from a highly manual process. We are:

- moving to digital channels for providing and managing information
- moving towards greater automation and a customer self-service approach

If you are a New Zealand foreign trust you will be able to:

- register as a NZ foreign trust through myIR or via our website
- see and manage your NZ foreign trust (FTR) account in myIR
- file your annual return via myIR
- view previously provided foreign trust information including filed returns
- communicate with us securely in myIR
- choose from a number of online payment options including through your New Zealand bank account
- manage connected persons details

If you are a registered tax agent you will also be able to:

- Link and redirect mail to your clients' NZ foreign trust (FTR) account like you do for other accounts
- register an entity for FTR under the tax preparer tab in myIR. The FTR account will be auto linked when registered from the Tax preparer tab.

Now we'll go through what you need to do now to get ready and how to access myIR once the changes are in place.

Registered NZFTs at 1 March 2021

- Will be allocated an IRD number by 1 March 2021 (you don't need to apply)
- Will automatically be moved to our new system, and your NZFT (FTR) account will be added

You will need to:

- make sure you have received your IRD number
- consider who else needs access, and what type of access
- create myIR web logons for any other staff who will need to access the NZFT account
- consider the best way to access your myIR account depending on your structure

If you have a tax agent who looks after your filing for you, you don't need to register or get access yourself

NZFT information and processes will move into our new system on 1 March 2021.

For NZFTs registered before 1 March 2021

- We will move you into our new system and allocate you an IRD number if you do not already have one for the trust.
- We will also add the NZ foreign trust (FTR) account.

Existing NZFTs

- Check that you have received an IRD number from Inland Revenue.
- Think about who needs to have online access to be able to manage the NZFT filing and paying, and the type of access they need. We'll talk about types of access later in this webinar.
- There are a few different ways to get online access in myIR so you'll need to think about what works best for you and the current structure you have in place. We'll talk through some of these now.

Note: If you have a tax agent who looks after your filing for you, you don't need to register or get access yourself.

If the trustee of the trust is a company:

- you can manage access to the trust via this company in myIR
- the director(s) of the trustee company register for a myIR web logon under the company IRD number
- they then create myIR web logons for any other staff who will need to access the NZFT account(s)



If the trustee of the trust is a company:

- You can manage access to the trust via this company in myIR.
- The director(s) of the trustee company need to register for a myIR web logon under the company IRD number.
- They will then need to create myIR web logons for any other staff who will need to access the NZFT account(s).

If the trustee of the trust is an individual:

- you can manage access to the trust via your personal IRD number in myIR
- you will need to register for a myIR web logon under your personal IRD number
- you will then need to create myIR web logons for any other people who will need access to the NZFT account(s)

You can also register each NZFT IRD number for its own myIR web logons but we recommend consolidating your access to either your individual IRD number or your Trustee company IRD number – unless you only have one or two NZFTs.



If the trustee of the trust is an individual:

- you can manage access to the trust via your personal IRD number in myIR
- you will need to register for a myIR web logon under your personal IRD number
- you will then need to create myIR web logons for any other people who will need access to the NZFT account(s)

You can also register each NZFT IRD number for its own myIR web logons – but you'll then need to log in and out of each one to file or view correspondence instead of managing them all under one myIR logon. We recommend consolidating your access to either your individual IRD number or your Trustee company IRD number – unless you only have one or two NZFTs.

If you are a registered tax agent:

- you will need to create myIR web logons for any other staff who will need to access the NZFT account(s)
- you may want to consider setting up a separate client list to separate access to your NZFT accounts, your Account Manager can do this for you at any time



If you are a registered tax agent:

- you will need to create myIR web logons for any other staff who will need to access the NZFT account(s)
- you may want to consider setting up a separate client list to separate access to your NZFT accounts, your Account Manager can do this for you at any time

Registering for a myIR web logon

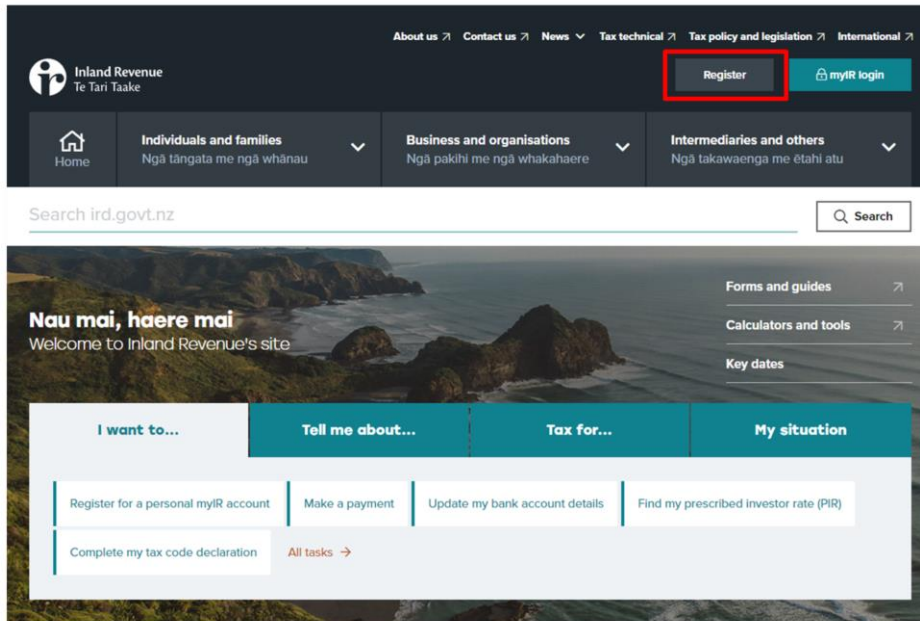
In this section we'll take you through the steps for registering for a myIR account. This is just about the authorised person responsible for the entity/individual getting an 'Owner' web logon.

We'll cover:

- Registering your trustee company, individual IRD number or your NZFT IRD number for a myIR web logon

What you need to do:

- Ensure you have a myIR account before your first filing date



- Once you know which IRD number you want to register for myIR (your own personal IRD number, your Trustee company or the actual NZFT itself), you'll need to go to www.ird.govt.nz. Once there, click on the register button in the top right hand corner.
- Only the trustee of an NZFT, or the director of a Trustee company can register for myIR and be set up as the 'Owner' logon.
- 'Owners' get full access to everything online.
- To allow other people to have access, once the Owner logon is created you can log in and create additional logons at any time

The following screenshots will step you through registering for myIR as a Trustee company or the actual trust itself – the process is fairly similar if you are registering your personal IRD number.

Note: Registered tax agents do not need to do this as access to clients' accounts is done differently.

Create a new web logon

1 What to expect >

What to expect

About this service	When to use this service
Create a myIR secure online services account.	Use this service to create a myIR account for yourself, or for a non-individual you are an owner of. An owner holds any of the following positions: <ul style="list-style-type: none">• Company - a director or executive office holder.• Trust - a trustee or an executive office holder.• Estate - the administrator or executor of the trust or an executive office holder.• Partnership - a partner or an executive office holder.• School - the principal, chairperson of the school board of trustees or an executive office holder.• Body corporate - an executive officer holder.• Any other non-individual - an executive officer holder.
What you'll need To create a myIR account for yourself, you need your: <ul style="list-style-type: none">• IRD number or customer identifier, and• an email address. To create a myIR account for a business or other organisation, you need: <ul style="list-style-type: none">• the IRD number or customer identifier for the business or organisation, and• an email address.	When you're done With a myIR account you can get your tax and entitlements sorted online anytime, anywhere.

Cancel Next >

- A **director** registers for a myIR logon for a trustee company
- A **trustee** registers for a myIR logon for an NZFT

- You'll be taken to our 'what to expect' page. This page explains what you'll need and who can register a myIR account.
- The person who registers may be different depending on whether you are registering for an NZFT or for a Trustee company:
 - You must be a recorded director of the Trustee company to register here for the company
 - You must be a recorded trustee to register the NZFT IRD number for a myIR logon
 - You'll also need your own personal IRD number so we can check you are a Trustee or the Director
- Once you have read the information, click **next** to continue with the registration process.

Create a new web logon

1 What to expect ✓ > 2 Your details >

Type of registration

Select registration type

Create a personal myIR account using your IRD number

Create a myIR account for your business or organisation, using the entity's IRD number

Create a myIR account for your non-resident business or organisation

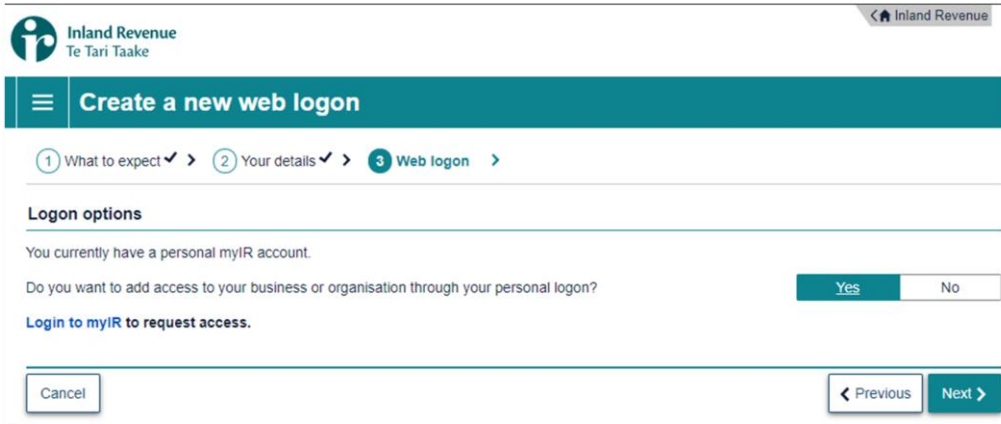
Your IRD number must have 9 digits. If you have an 8-digit IRD number, use a 0 at the start of the number.

Entity details	Personal details
IRD number/Customer identifier IRD number <input type="text"/>	IRD number/Customer identifier IRD number <input type="text"/>
Entity IRD number <input type="text"/>	IRD number <input type="text"/>
Entity name <input type="text"/>	First name <input type="text"/>
Your relationship to the entity <input type="text"/>	Last name <input type="text"/>
	Date of birth <input type="text"/>
	Web name <input type="text"/>

This is not your myIR user ID or your password. You will be asked to create a password when you first log in. Your web name will be displayed on your myIR account and can be different from your legal name.

Cancel Previous Next

- The next step is to provide the details for the trustee company or NZFT you are registering on behalf of, as well as your own personal details.
- In the 'relationship to the entity' box select:
 - Director or Executive Office Holder if you are registering for a trustee company, or
 - Trustee if you are registering for an NZFT
- Once you have filled in the required information, click **next** to continue.
- The web name box, is not for your myIR user ID or your password. It is your name (e.g. Jenny Jones). Your web name will be displayed on your myIR account and can be different from your legal name.



The screenshot shows the 'Create a new web logon' step in the myIR registration process. The page header includes the Inland Revenue logo and the text 'Inland Revenue Te Tari Taake'. The main heading is 'Create a new web logon'. Below this, there is a progress indicator with three steps: '1 What to expect ✓ >', '2 Your details ✓ >', and '3 Web logon >'. The 'Web logon' step is currently active. Under the heading 'Logon options', there is a message: 'You currently have a personal myIR account. Do you want to add access to your business or organisation through your personal logon?'. There are two radio button options: 'Yes' and 'No'. Below the options, there is a link: 'Login to myIR to request access.'. At the bottom of the form, there are three buttons: 'Cancel', '< Previous', and 'Next >'.

- If the person registering the account (e.g. director or trustee) already has a personal myIR account, they will be asked if they would like to add access to their business or organisation through their personal logon.
- For simplicity, we recommend you select **No** here. We will cover how to get access towards the end of this webinar.

Create a new web logon

1 What to expect ✓ > 2 Your details ✓ > 3 Web logon >

Logon options

You currently have a personal myIR account.

Do you want to add access to your business or organisation through your personal logon? Yes No

By selecting 'No' you may continue and create a separate owner logon for your business or organisation.

Create a user ID

Logon *Required

Check availability

Check the availability of your user ID

Select notification preference

By creating a myIR account you consent to receiving information electronically, for example notices and statements. Select your preferred method of contact for being notified. See our conditions of use for more information.

Preferred contact method *Required

Email address *Required

Country code NEW ZEALAND

Mobile phone

Cancel < Previous Next >

- Continue with the registration process and create a userID and select your notification preferences.
- If your preferred userID is already allocated, you will need to try another.
- Your preferred contact method is how IR will notify you if you have a message or letter available to view online. You can choose between email, text or both email and text message.
- Once you have done this, click **next** to continue the registration process.

Create a new web logon

1 What to expect ✓ > 2 Your details ✓ > 3 Web logon ✓ > 4 Activation >

Activating your account

To activate your account, call us on 0800 227 770 (or +64 4 890 2120) after submitting this and give us your IRD number. If you're enrolled for voice ID, you can call us at any time, 7 days a week. Otherwise, call us between 8:00am and 8:00pm Monday to Friday, or 9:00am and 1:00pm on Saturdays.

Once you have activated your account, we will send you an email link to set your password. **You must use this link within 30 minutes of receiving the email.** If you cannot access it within 30 minutes, go to [Forgot password?](#) on the login page or contact us to send you another email link.

Note: Your logon will not be accessible until you call to activate.

Declaration

I declare:

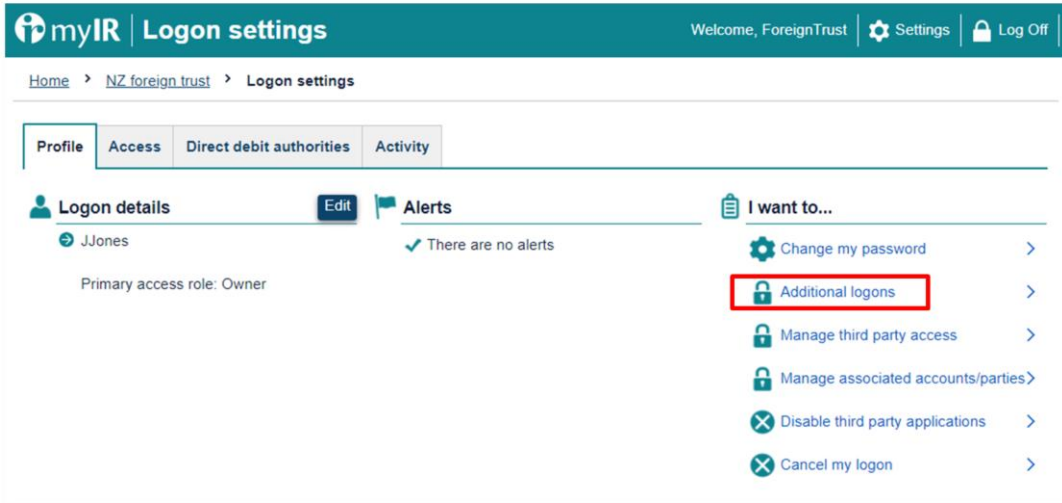
- I have read and accept Inland Revenue's [conditions of use](#)
- I understand I will no longer receive paper statements, notices or other correspondence from Inland Revenue.

- You'll then be taken to our declaration page.
- This page also asks you to contact us to activate your account. If we can see a link between you and the NZFT or trustee company at our end, and we have a mobile phone number recorded for you, we may be able to send you a text message with an activation code at this step. If not, you will be instructed to call us so we can verify your identity before your registration is activated.
- If you have read and accepted our conditions of use and you are accepting that you will no longer receive paper statements, notices or other correspondence, you can **select the declaration box** and **click next**.
- Once you have activated your account, we will send you an email link to set your password. You must use the link within 30 minutes of receiving the email. If you cannot access it within 30 minutes, go to the [Forgot Password? Link](#) on the login page or contact us to send you another email link.
- Your logon will not be accessible until you have activated your account.

Now that you've got a web logon we'll talk about myIR access to the NZFT account.

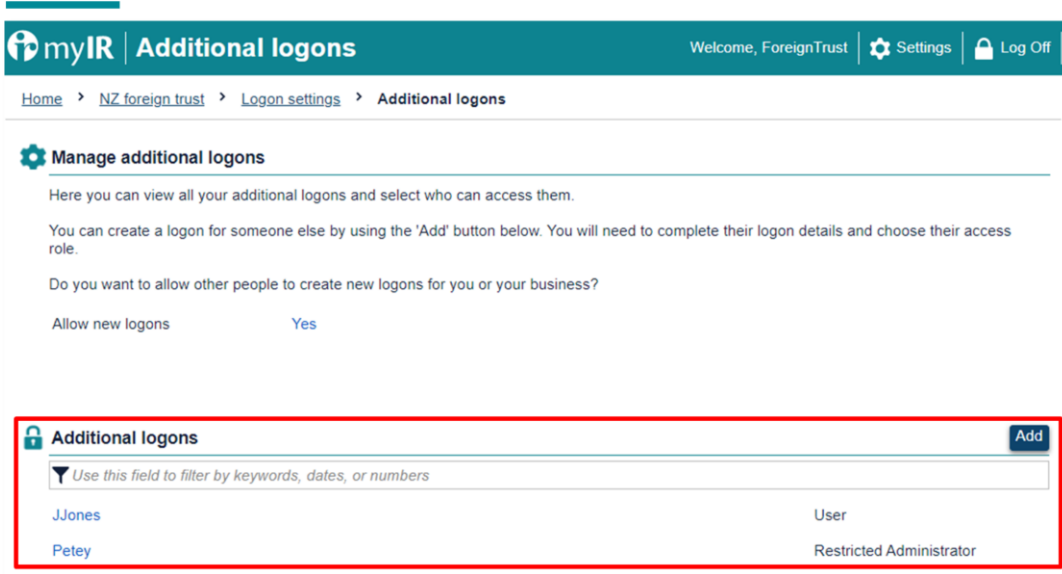
Setting up myIR access

- We've talked about the owner being registered and activated in myIR but other staff may need to access the account for day to day management of the NZFT.
- Now we'll walk you through the steps for adding additional logons for others to access the NZFTs. The process is the same for tax agents, trustee companies, individuals or if you're creating new logons under the NZFT IRD number itself.
- You can already create myIR logons for anyone who will need access to myIR from 1 March 2021 but the NZFT account won't yet be visible to delegate access to it. We recommend all logons are set up prior to your first filing date as it gives us plenty of time to assist you in setting up before online access becomes critical.



The screenshot displays the myIR 'Logon settings' page. At the top, there is a teal header with the myIR logo and 'Logon settings' text. To the right of the header, it says 'Welcome, ForeignTrust' and has links for 'Settings' and 'Log Off'. Below the header, there is a breadcrumb trail: 'Home > NZ foreign trust > Logon settings'. A navigation bar contains tabs for 'Profile', 'Access', 'Direct debit authorities', and 'Activity'. The main content area is divided into three sections: 'Logon details' for user 'JJones' with an 'Edit' button and 'Primary access role: Owner'; 'Alerts' showing 'There are no alerts'; and 'I want to...' which is a dropdown menu with options: 'Change my password', 'Additional logons' (highlighted with a red box), 'Manage third party access', 'Manage associated accounts/parties', 'Disable third party applications', and 'Cancel my logon'.

- If you have other staff who need to access the NZFT account(s) in myIR you will need to create them their own myIR web logon. You need to register an Owner logon to be able to do this (see the 'registering for myIR section' of this presentation for guidance on how to do this). Only myIR Owners, Administrators and Restricted administrators can set up additional logons. Shortly we'll talk about what these roles are.
- To create additional logons, log in to myIR, select '**Settings**' from the top, right navigation bar, and select **Additional logons** from the 'I want to' menu.



myIR | Additional logons Welcome, ForeignTrust Settings Log Off

[Home](#) > [NZ foreign trust](#) > [Logon settings](#) > **Additional logons**

Manage additional logons

Here you can view all your additional logons and select who can access them.

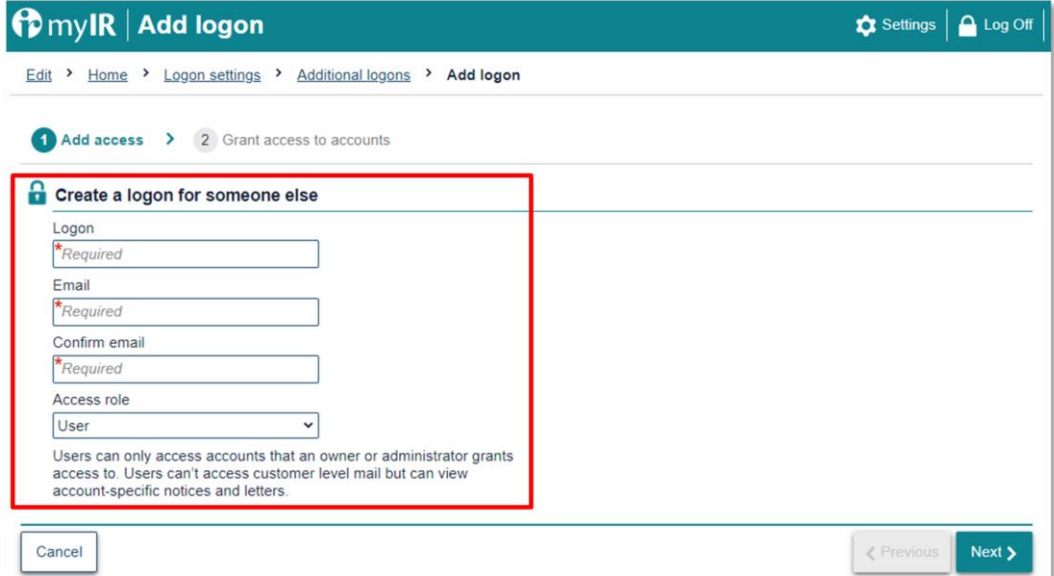
You can create a logon for someone else by using the 'Add' button below. You will need to complete their logon details and choose their access role.

Do you want to allow other people to create new logons for you or your business?

Allow new logons Yes

Additional logons		Add
<input type="text" value="Use this field to filter by keywords, dates, or numbers"/>		
JJones	User	
Petey	Restricted Administrator	

- This page will show any logons you've already created – and this is where you go to edit access to a logon at a later date e.g. after 1 March 2021.
- There is an option for you to allow other people to create new logons. This is defaulted to yes. Changing this will mean no one else can set up new logons.
- You can create a logon for someone new by using the **add** button. You will need to complete their logon details and choose their access role.



myIR | Add logon Settings | Log Off

Edit > Home > Logon settings > Additional logons > Add logon

1 Add access > 2 Grant access to accounts

Create a logon for someone else

Logon
**Required*

Email
**Required*

Confirm email
**Required*

Access role
User

Users can only access accounts that an owner or administrator grants access to. Users can't access customer level mail but can view account-specific notices and letters.

Cancel < Previous Next >

- For each additional person needing access to myIR, you will need to complete their logon details and choose the access role you want them to have (we discuss what these are in the next slides). And then click **next**.
- The logon you choose will be their userID.

myIR access roles

Owner	Total access to online services.
Administrator	Can have similar access as the owner, at the owner's discretion and will have access to customer level mail.
Restricted administrator	Can access all the features and functionality that an Administrator can, except they cannot view Customer level mail.
User	Limited access granted by either the Owner or Administrator. Regardless of the level of access which is set, a User can see all account information.
Restricted user	Same as users, unless you are a tax agent.

We'll quickly cover the different access roles to help you choose the right one for each person.

Owner

- You cannot create an owner here, an owner has to register and be activated. They get total access to online services. An Owner is legally responsible for the entity e.g. the Trustee of a trust or Director of a company.

Administrator

- Can have similar access as the owner, at the owner's discretion and will have access to customer level mail. Customer level mail is letters that aren't 'account specific' for example, debt notices combining outstanding balances for GST and income tax in the same letter. Most NZFT mail is account letters so anyone with access to the NZFT account can view the account mail. Administrators can create new logons and also grant other logons access to the accounts they have access to already, to the account permission (e.g. read only) the owner has authorised.
- We'll discuss account permissions on the next slide.

Restricted Administrator

- Can access all the features and functionality that an Administrator can, except they cannot view Customer level mail.
- Restricted administrators will still have access to account level mail for any account they have access to.

User

- Is limited to account level access as granted by either the Owner or Administrator.
- The next slide will cover the different Account permissions which can be set.
- Regardless of the level of access which is set, a User can see all account information.

Restricted User

- Has the same access as users. There are other differences between User and Restricted user within a tax agency in relation to tax agent specific web services.

Account permission type	View account information	File returns and disclosures	Arrange payments in myIR
Full account access	✓	✓	✓
File	✓	✓	x
Make payments	✓	x	✓
Read only	✓	x	x

When owners or administrators add additional logons, different account permissions can be set to the NZFT account (or any other account). Now we'll quickly cover the specific actions for each account permission type to ensure you choose the right one for each logon.

Full account access

- Can view all account information for all or specific tax types
- Can file returns, disclosures, send mail, make payments, add new or edit existing refund bank accounts, add/cease accounts and request financial transfers on some accounts
- Can make payments by direct debit

File

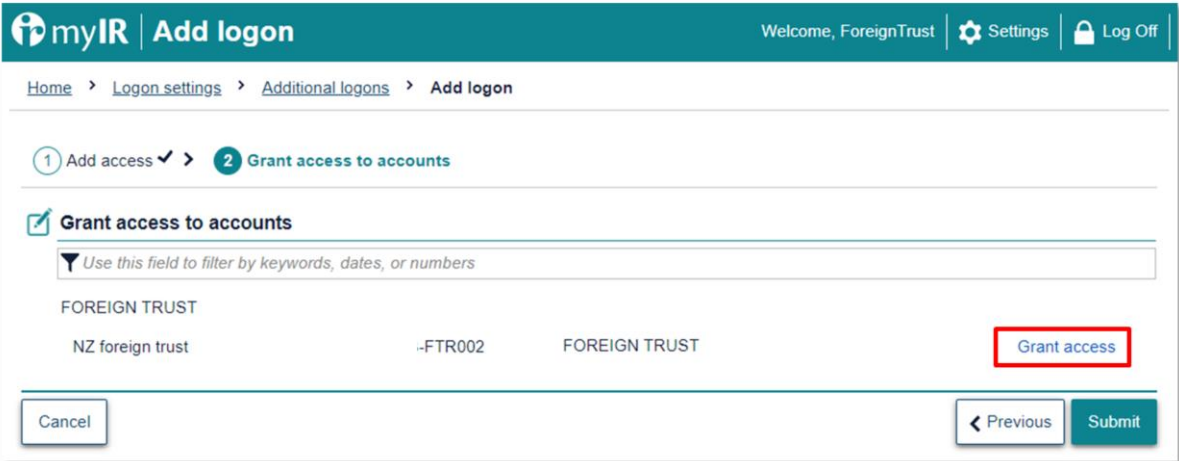
- Can view all account information in the account
- Can file returns, disclosures and send mail
- Cannot make payments or change refund bank accounts

Make payments

- Can view all account information in the account
- Can send mail
- Can make payments by direct debit
- Cannot file returns or change refund bank accounts

Read only

- Can view all account information
- Can send mail
- Cannot file returns or make payments

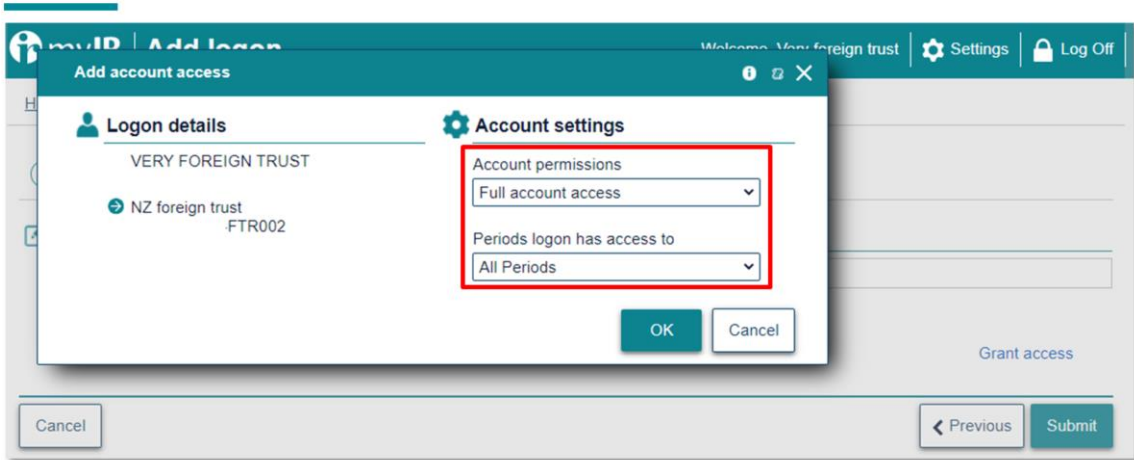


The screenshot shows the myIR 'Add logon' interface. The breadcrumb trail is: Home > Logon settings > Additional logons > Add logon. The current step is '2 Grant access to accounts', with '1 Add access' completed. A search bar is present with the placeholder text 'Use this field to filter by keywords, dates, or numbers'. Below the search bar, a table lists accounts:

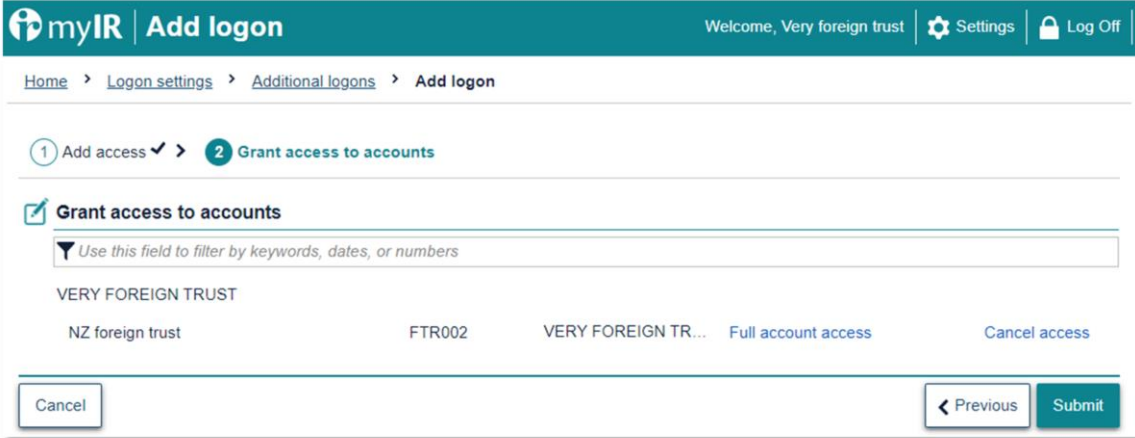
FOREIGN TRUST			
NZ foreign trust	-FTR002	FOREIGN TRUST	<input type="checkbox"/> Grant access

At the bottom of the interface, there are three buttons: 'Cancel', '< Previous', and 'Submit'.

- Once you have selected the role for the new logon, you will need to choose which accounts you would like them to have access to.
- This screen will only show the accounts currently under the IRD number you're creating the logon under:
 - If you're adding them under the Trustee Company, you'll see their accounts e.g. Income tax
 - If you're adding them under your personal IRD number, you'll see your own accounts
 - If you're adding them under the NZFT IRD number, you might not see any accounts yet
- Click on **grant access** next to the accounts you wish to grant access to - you don't have to grant any access at this stage, you can just click **submit** here to create the logon in preparation for the 1 March changes and then go back in to grant the access once the changes are live.



- Once you have clicked to grant access for an account, you will need to select which level of access you would like them to have, and the periods they will have access to. For simplicity, most people give access to 'All periods' here.



The screenshot shows the myIR 'Add logon' interface. The header includes the myIR logo and 'Add logon' text, along with a user greeting 'Welcome, Very foreign trust', 'Settings', and 'Log Off' links. The breadcrumb trail is 'Home > Logon settings > Additional logons > Add logon'. The main content area shows two steps: '1 Add access' and '2 Grant access to accounts', with the second step being active. Below this, there is a section titled 'Grant access to accounts' with a checked checkbox. A search bar is present with the placeholder text 'Use this field to filter by keywords, dates, or numbers'. Below the search bar, a table lists accounts with columns for account name, ID, and access type. The table contains one entry: 'VERY FOREIGN TRUST' with ID 'FTR002' and 'Full account access'. A 'Cancel access' link is visible next to the entry. At the bottom of the form, there are three buttons: 'Cancel', '< Previous', and 'Submit'.

myIR | Add logon

Welcome, Very foreign trust | Settings | Log Off

Home > Logon settings > Additional logons > Add logon

1 Add access ✓ > 2 Grant access to accounts

Grant access to accounts

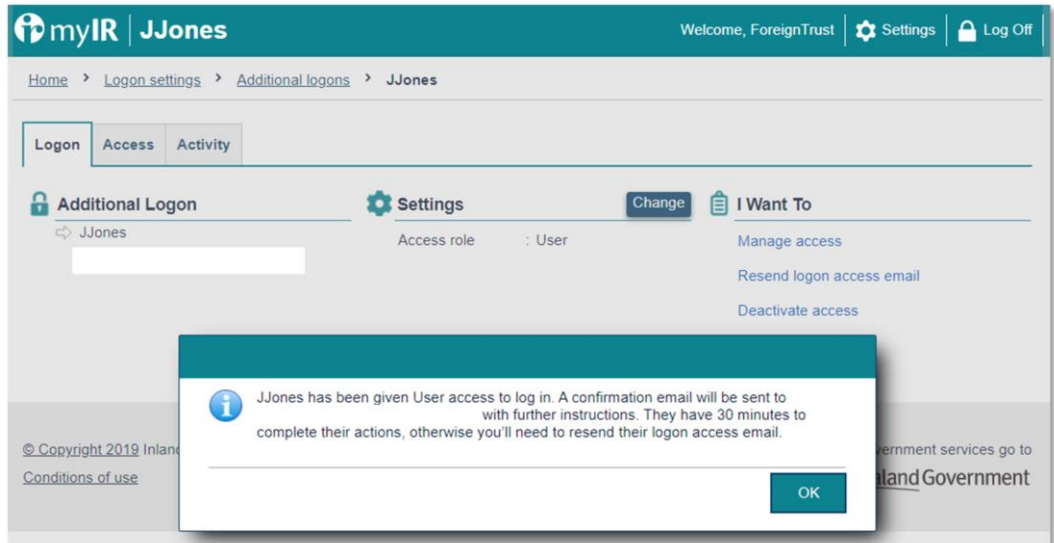
Use this field to filter by keywords, dates, or numbers

VERY FOREIGN TRUST

NZ foreign trust	FTR002	VERY FOREIGN TR...	Full account access	Cancel access
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Cancel < Previous Submit

Once you have granted access to each of the accounts you want the person to have access to and selected the permission types for each (or none at this stage), click **submit**.



The screenshot shows the myIR interface for user JJones. The breadcrumb trail is Home > Logon settings > Additional logons > JJones. The 'Additional Logon' section shows the user JJones with an empty text field. The 'Settings' section shows 'Access role' set to 'User'. A 'Change' button is visible. The 'I Want To' menu includes 'Manage access', 'Resend logon access email', and 'Deactivate access'. A modal box displays a confirmation message: 'JJones has been given User access to log in. A confirmation email will be sent to with further instructions. They have 30 minutes to complete their actions, otherwise you'll need to resend their logon access email.' An 'OK' button is at the bottom right of the modal.

- When you've submitted your request a confirmation email will be sent to the person's email address with further instructions. They will then have 30 minutes to complete their actions, otherwise you will need to resend their logon access email.
- You can do this at any time by going back into **Settings > additional logons** and clicking the **resend logon access email** link in the 'I want to' menu.

- From 1 March 2021 you can access your NZFT account
- How you do this will depend on whether you're a tax agent, individual or trustee company

Tax agents

- Will be able to link to the NZFT account using the Client maintenance link on the Tax preparer tab

Once linked:

- you will be able to bring accounts into your workspace or use the client quick access box on the Tax preparer tab
- any staff logons will be able to access these accounts, as long as you've given them access to the client list the account is linked to

If you're unsure, please contact your Account Manager for assistance.

Now we'll talk about how to get or grant access from 1 March onwards.

Depending on how you've structured yourself is how you'll do this.

For tax agents:

- You'll be able to link to the NZFT account using the Client maintenance link on the Tax preparer tab in the same way you link any other new client.
- Once you're linked you can bring accounts into your workspace or use the client quick access box on the Tax preparer tab.
- Any staff logons will be able to access these accounts once you're linked, as long as you've given them access to the client list the account is linked to.

If you're unsure about any of this, please contact your Account Manager for assistance.

Individual web logons

- If you are going to use your personal IRD number to gain access you need to claim this in myIR.
- You'll need to do this before you can grant access to anyone else you've set up with a logon under your IRD number.

Trustee company web logons

- If you are going to use your trustee company IRD number to gain access to your trusts you need to claim this in myIR.
- You'll need to do this before you can grant access to anyone else you've set up with a logon under your trustee company.

For access via your Individual web logon:

- If you are going to use your personal IRD number to gain access you need to claim this in myIR. You'll need to do this before you can grant access to anyone else you've set up with a logon under your IRD number.

For access via your Trustee company:

- Similarly, if you are going to use your trustee company IRD number to gain access to your trusts you need to claim this in myIR. You'll need to do this before you can grant access to anyone else you've set up with a logon under your trustee company.

The following slides will step you through how to grant access.

Are you having difficulty meeting your obligations due to COVID-19?

We have a range of ways to help - Go to ird.govt.nz/covid-19 to find out more or talk to your tax agent.

This example shows an individual logon. If you are a trustee company, the customer name will be the trustee company name.



Customer	Jenny Jones jenny.jones@testing.com Last logged on 27-Jan-2021	Alerts ✔ There are no alerts	I want to... Manage refund bank accounts > Request an instalment arrangement > Manage payments and returns > Review my IRD numbers > More >
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To claim access to your other IRD numbers:

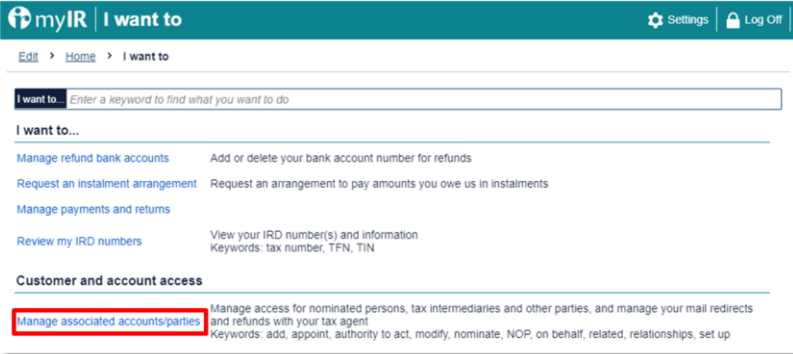
For an individual IRD web logon:

- Log in to myIR with your individual IRD number logon
- If you already have access to more than one IRD number, go into your own personal IRD number tile

For a trustee company IRD logon

- Log in to myIR with your trustee company IRD number logon
- If you already have access to more than one IRD number, go into the trustee company IRD number tile

The rest of the steps are the same for both. This example shows an individual logon. If you are a trustee company, the customer name will be the trustee company name.



The screenshot shows the 'myIR | I want to' navigation bar with 'Settings' and 'Log Off' options. Below the search bar, there are several menu items under 'I want to...':

- Manage refund bank accounts: Add or delete your bank account number for refunds
- Request an instalment arrangement: Request an arrangement to pay amounts you owe us in instalments
- Manage payments and returns
- Review my IRD numbers: View your IRD number(s) and information. Keywords: tax number, TPN, TIN

Under the 'Customer and account access' section, the item 'Manage associated accounts/parties' is highlighted with a red box. Its description is: 'Manage access for nominated persons, tax intermediaries and other parties, and manage your mail redirects and refunds with your tax agent. Keywords: add, appoint, authority to act, modify, nominate, NOP, on behalf, related, relationships, set up'.

Relationships

Use this field to filter by keywords, dates, or numbers

Name	IRD number	Relationship	
My related parties			
FOREIGN TRUST	139-434-773	Trustee	View or edit

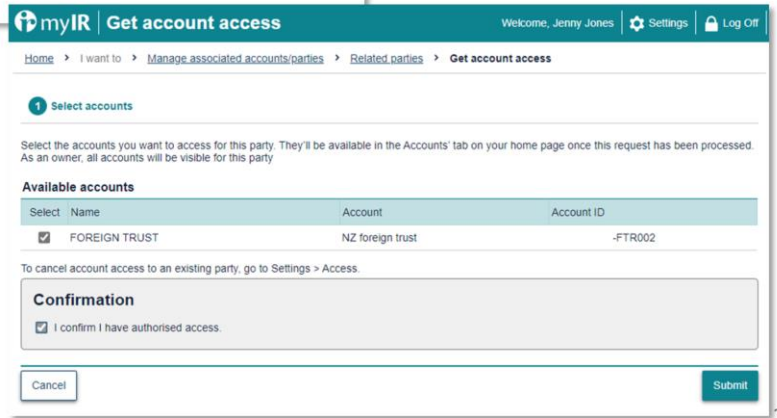
If you have multiple trusts they will all show here.



- Under 'I want to...' > **More** select **Manage associated accounts/parties**
- Here you will see a table of all the other IRD numbers you are related to – any companies, partnerships, and your NZFT's will show here.
- If you cannot see some of your trusts it means IR has not been able to connect you to them.
- Click the **View or edit** link

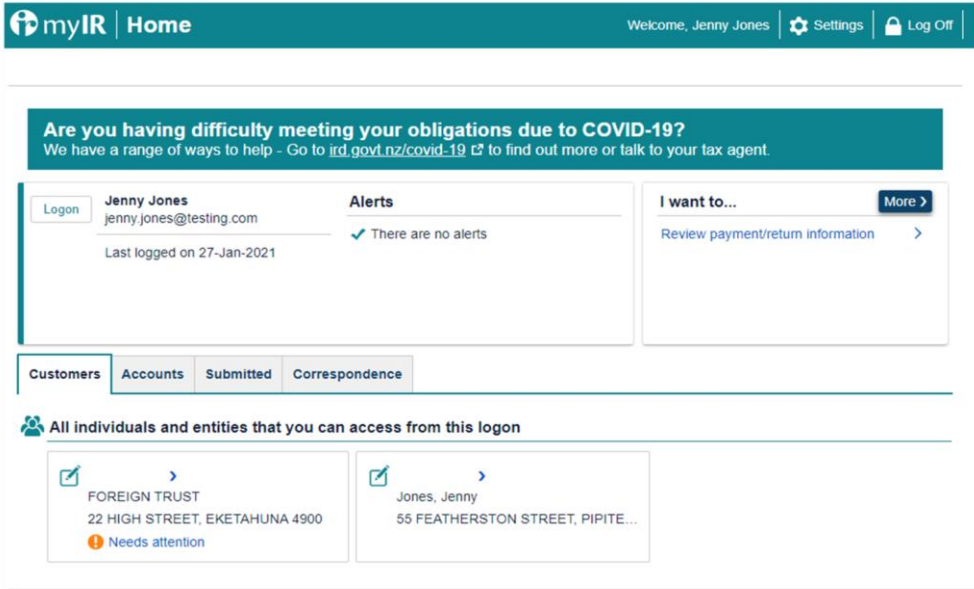


The screenshot shows the myIR 'Related parties' page. The breadcrumb trail is: Home > I want to > Manage associated accounts/parties > Related parties. Under the 'Trust' section, the details for 'FOREIGN TRUST' are listed: Name: FOREIGN TRUST, IRD number: (blank), and Commence date: 26-Jan-2021. To the right, under 'I want to', there is a button labeled 'Get account access' which is highlighted with a red rectangle.



The screenshot shows the myIR 'Get account access' page. The breadcrumb trail is: Home > I want to > Manage associated accounts/parties > Related parties > Get account access. The page has a '1 Select accounts' step indicator. Below this, it says: 'Select the accounts you want to access for this party. They'll be available in the Accounts' tab on your home page once this request has been processed. As an owner, all accounts will be visible for this party.' Under 'Available accounts', there is a table with columns 'Select', 'Name', 'Account', and 'Account ID'. One row is shown with 'FOREIGN TRUST' selected, 'NZ foreign trust' as the account name, and '-FTR002' as the account ID. Below the table, it says: 'To cancel account access to an existing party, go to Settings > Access.' There is a 'Confirmation' section with a checked checkbox: 'I confirm I have authorised access.' At the bottom, there are 'Cancel' and 'Submit' buttons.

- Under 'I want to...' select **Get account access**.
- This will add the Trust to your myIR home page – and when you click into it, you'll see all the trust's accounts.
- You need to repeat this process for all of your trusts (but you only need to do this once).
- Once you have claimed online access to all your related IRD numbers you can then give others access as shown in the 'Granting access' slides.



The screenshot shows the myIR Home page for user Jenny Jones. The page includes a navigation bar with 'myIR Home', 'Welcome, Jenny Jones', 'Settings', and 'Log Off'. A prominent message asks if the user is having difficulty meeting obligations due to COVID-19. Below this, there are sections for 'Logon' (showing email and last login), 'Alerts' (showing no alerts), and 'I want to...' (with a 'More' button and a link to 'Review payment/return information'). A menu bar includes 'Customers', 'Accounts', 'Submitted', and 'Correspondence'. The main content area is titled 'All individuals and entities that you can access from this logon' and lists two entities: 'FOREIGN TRUST' (22 HIGH STREET, EKETAHUNA 4900) with a 'Needs attention' warning, and 'Jones, Jenny' (55 FEATHERSTON STREET, PIPITE...).

This screen shows how your NZFT account shows on your myIR home screen.

Are you having difficulty meeting your obligations due to COVID-19?

We have a range of ways to help - Go to ird.govt.nz/covid-19 to find out more or talk to your tax agent.

Customer JJones Last logged on 27-Jan-2021	Alerts ✓ There are no alerts	I want to... More > Manage refund bank accounts > Request an instalment arrangement > Manage payments and returns > Review my IRD numbers >
---------------------------------------------------------	----------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------

Accounts Submitted Correspondence Names and addresses Logons

All accounts (tax types) that you can access

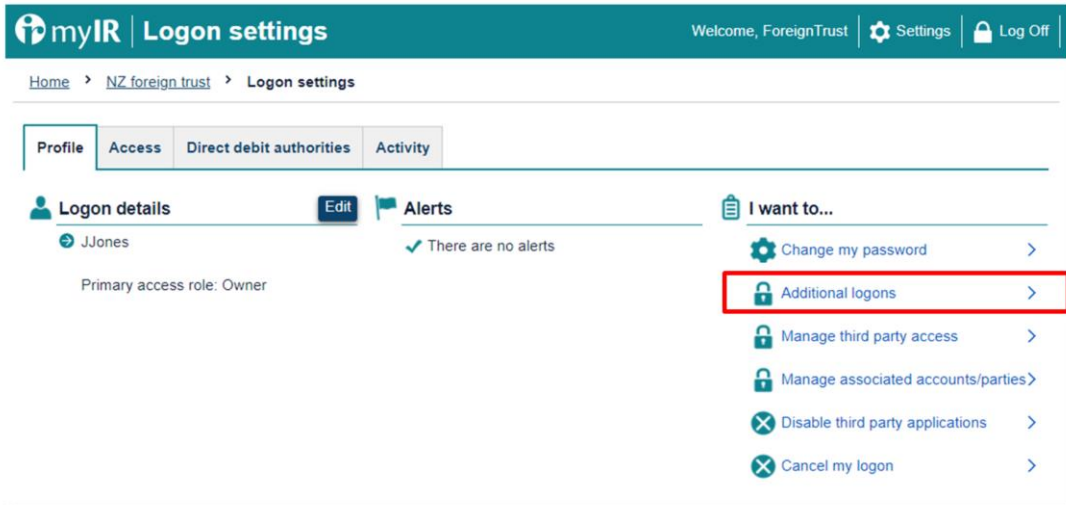
[View accounts >](#)

NZ foreign trust >	\$0.00
-FTR002	
FOREIGN TRUST	
22 HIGH STREET, EKETAHUNA 4900	
 File return for 31-Mar-2020	

To gain access via your NZFT IRD number:

- If you are going to use your trustee company IRD number to gain access to your trusts you can just log in using the new logon you created.
- The NZFT account tile will be visible from 1 March 2020.

You can now give others access as shown in the 'Granting access' slides.



myIR | Logon settings Welcome, ForeignTrust [Settings](#) [Log Off](#)

[Home](#) > [NZ foreign trust](#) > **Logon settings**

Profile | Access | Direct debit authorities | Activity

Logon details [Edit](#) **Alerts**

JJones ✓ There are no alerts

Primary access role: Owner

I want to...

- [Change my password](#) >
- [Additional logons](#) >**
- [Manage third party access](#) >
- [Manage associated accounts/parties](#) >
- [Disable third party applications](#) >
- [Cancel my logon](#) >

Now we'll look at granting access.

To grant access to a logon created before 1 March in preparation, or in the future if you need to change access around you can do this from 'Settings' on the top right navigation from your myIR home page.

Logon Access Activity

Additional Logon

↔ JJones

Settings

Access role : User


Change

I Want To

- Manage access
- Resend logon access email
- Deactivate access

Select the person's logon (UserID) that you are wanting to update the access for, and click on **Change**.

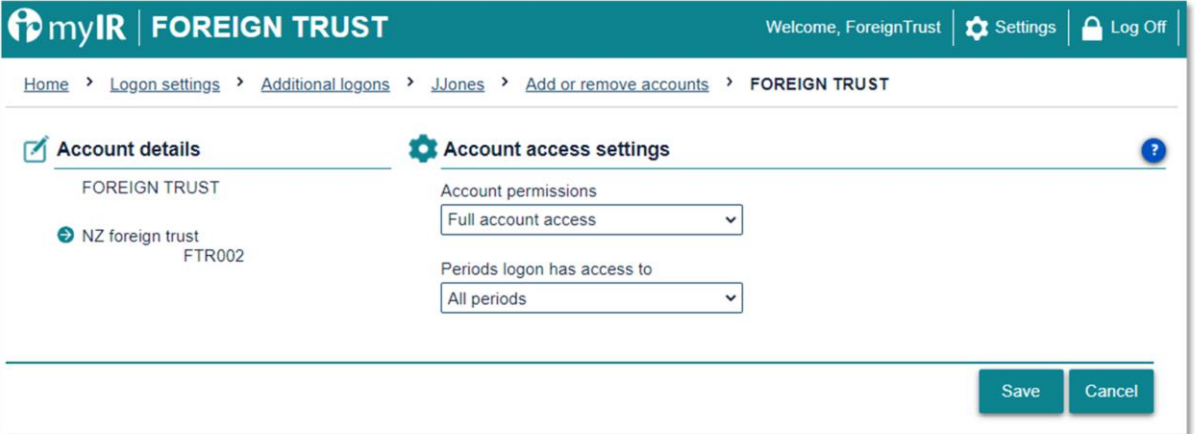
Manage Access for JJones

 Use this field to filter by keywords, dates, or numbers

FOREIGN TRUST -

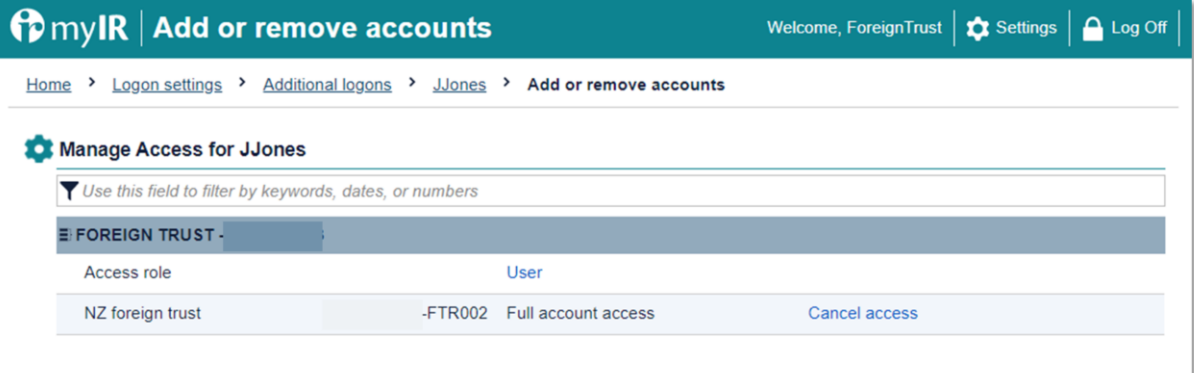
Access role	User	
NZ foreign trust	FTR002	Grant access

- On this next page you can grant or cancel access for the different accounts.
- If you are using your own IRD number or your Trustee company to access all your NZFT accounts, you need to have completed the previous step to claim them in myIR before they will show in this step to grant access to other people.
- To grant access to a new account, click on **Grant access**.



The screenshot shows the 'myIR FOREIGN TRUST' interface. At the top, there is a navigation bar with 'Welcome, ForeignTrust', 'Settings', and 'Log Off'. Below this is a breadcrumb trail: 'Home > Logon settings > Additional logons > JJones > Add or remove accounts > FOREIGN TRUST'. The main content area is split into two tabs: 'Account details' and 'Account access settings'. Under 'Account details', there is a list of accounts: 'FOREIGN TRUST' and 'NZ foreign trust FTR002'. The 'Account access settings' tab is active, showing two dropdown menus: 'Account permissions' set to 'Full account access' and 'Periods logon has access to' set to 'All periods'. At the bottom right, there are 'Save' and 'Cancel' buttons.

As with setting up a new logon, once you have selected to grant access for an account, you will then need to choose which level of access you would like them to have, and the periods they will have access to.



The screenshot shows the myIR interface for managing access. The breadcrumb trail is: Home > Logon settings > Additional logons > JJones > Add or remove accounts. The page title is 'Manage Access for JJones'. There is a search filter field with the placeholder text 'Use this field to filter by keywords, dates, or numbers'. Below the filter is a table with the following content:

FOREIGN TRUST			
Access role			User
NZ foreign trust	-FTR002	Full account access	Cancel access

- Once access has been granted to the account, the option to cancel access will show beside the account. If you ever want to remove access from one of your logons you do this here.
- As the logon in this example was already previously registered for myIR, they won't receive an email with further steps they need to complete. They will be able to log in and see the new IRD numbers and accounts on their home page to access the NZ foreign trust account immediately.

NZFT Webinars

There are three webinars in this series. You can find them at: ird.govt.nz/webinars

- Getting ready: setting up your New Zealand foreign trust's myIR including getting access
- Managing your New Zealand foreign trust in myIR
- Setting up a new New Zealand foreign trust in myIR



That concludes this webinar. As a reminder, we have three webinars in this series that can help you manage your NZFT(s) in myIR:

- Getting ready: setting up your New Zealand foreign trust's myIR including getting access
- Managing your New Zealand foreign trust in myIR
- Setting up a new New Zealand foreign trust in myIR

You can find all of these at ird.govt.nz/webinars

As we said earlier, if you have any questions:

- Before 1 March, please email nzforeigntrusts@ird.govt.nz.
- After 1 March, if you have any questions about a particular trust please send a web message from myIR. We will keep the NZ foreign trusts email address open for general NZFT queries.

Thank you for watching and we hope you have found this webinar useful.

[UNCLASSIFIED]



Inland Revenue
Te Tari Taake



Thank you