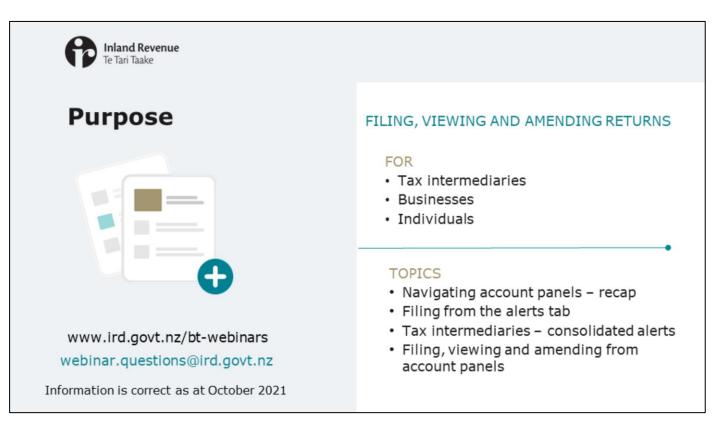


# Filing, viewing and amending in myIR

IR Business Transformation

OCTOBER 2021



- In recent webinars we've introduced the new version of myIR including the new look and feel, key navigation changes and how alerts will work.
- In this short presentation we'll talk about how to navigate myIR to file, view and amend returns.
- The information is correct as at October 2021.







- You can file a return:
  - using the alerts tab, and
  - through the account panels
- It is also easy to find returns you've filed if you want to view or amend them
- The return itself has the same fields as now
- This webinar looks at how you find the returns, it doesn't cover how to complete the form

- You can file a return in myIR using the alerts tab and through the account panels.
- These paths are easy to follow and take fewer clicks than now to navigate to the return.
- It is also easy to find returns you've filed if you want to view or amend them.
- We'll look at the options for filing a return in this webinar. We won't look at the detail of how you undertake the tasks as this is the same as now. On some screens there may be a slight change in the layout. All this means is that some fields sit next to each other horizontally, rather than vertically, to reduce the need for scrolling.
- The returns follow the same cleaner look and feel that you'll see throughout the upgraded version of myIR.

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- First we'll recap some of the key navigation you'll use the customer and account type panels, and the alerts tab.
- You might have access to more than one customer account for example, if you're a tax intermediary or an executive office holder. If so, you'll need to select the customer you want to file a return for. You'll then go to the summary tab which is the landing page for that customer.
- If you have access to just one customer account (for example, your own), you'll go straight to that landing page.

Inland Revenue Te Tari Taake			Navigation – general
	BLOGGS BUSINESS LTD 151-11-11 1 FAKE STREET, FAKETOWN 6011 Summary Alerts • want to		Welcome, Joe Bloggs nu tet leger in an Along, May 17, 201 al 21 al Manage my profile
	GST ELLOGGS BUSINESS J7D 111-111-111-057003 Aiems	Total balance: \$698.38 Due nexe: \$998.38	Mote a payment     Return and transactions     More
	Income tax BLOODS BUDHESS UTD 111-111-111-00002 Alarts	Total balance: \$50.00 Due noe: \$50.00	Matice payment     Automa and banactions     Income summary     More
	Payroll BLOGGS BUSINESS LTD 111-113-111-BMP004	30-Jun-2021	Express file transfer     File or uplead a return
		Total balance: \$0.00 Due now: \$0.00	Engloyees     Maix a payment     Return and transactions     More

• On the customer landing page you'll see the accounts you have access to; and the alerts tab.

Te Tari Taake		Navigation -	tax intermediar
	Intermediary centre Alerts		
L	Filters	All Account Types - All Actions	
	Tope to film		
	CLIENT 6	You have an unread message. Manages set to your may contain important information about your accounts. View Messages	×
	Income tax cutor 6 111-111-INCODE	Income tax return for 31-Mar-2021 is due 31-Mar-2022 Too Ama an opposing indice to file or or before 31-Mar-2022. Second field the may be adjust to penalty. File Return	×
	Payroll CDINT 6 TTD-TTD-TTT-(MPDD4	Total due: \$261.40 You have a balance due. Peralty and/or interest may be applied if this balance remains outstanding. Make a payment	×
	GST CLIENT 8 222-222-027-057904	Total due: \$3,260.87 You have a failure and "Paulty and/or interest may be applied if this balance remains outstanding. Make a payment	×
		•	
	1	ntermediary centre	

• If you are a tax intermediary you'll also have access to the Intermediary centre, including the alerts for all the subscribed client accounts for your logon.

BLOGGS BUSINESS LTD 111-111-111 1 FAKE STREET, FAKETOWN 6011 Summary Alerts I want to		Welcome, Joe Bloggs You last logged in on Monday, May 17, 2021 8:42:15 AM Manage my profile
GST BLOGGS BUSINESS LTD 111-111-111-GST003 Alerts	Total balance: \$698.38 Due now: \$698.38	<ul> <li>Make a payment</li> <li>Returns and transactions</li> <li>More</li> </ul>

- The simplest and quickest way to find returns for filing is through the alerts tab.
- Let's take the example of GST.
- If there is a return coming due (or overdue) it will show as an alert you'll see a red dot on the GST account panel on the landing page. There will also be a red dot on the alerts tab indicating how many alerts – across all tasks - are awaiting attention.

Inland Revenue Te Tari Taake		Filing from	the alerts tab
		Welcome. Jo	Bloom
	Summary Alerts • Iwant to	You last logged in an Thursday, Sep 28, 2021	
	GST ELOGGS BUSINESS LYD 139-428-141-GS1004	You have a payment due now You have \$334.73 due for payment now. Make a payment now to stop any penalties and interest. Make a payment	×
		Your 31-May-2021 return was due on 28-Jun-2021 Too 11-Jun-2021 return was due on 28-Jun-2021. If your return stays unfind this may mean a lide filing penalty. File your return	×
	Income tax excloses express sto 19-426-141-0xC02	You have a payment due now Too have SSODO due to payment now. Make a payment now to stop any penalties and interest. Make a payment	×

• Go to the Alerts tab, find the GST return and click the 'file a return' link. This will open that specific return for you to complete.

Inland Revenue Te Tari Taake		Filing from the aler	ts tab
<ul> <li>BLOGGS BUSINESS LTD</li> <li>GST return</li> <li>31-May-2021</li> <li>GST</li> <li>111-111-GST004</li> <li>BLOGGS BUSINESS LTD</li> <li>GST return</li> </ul>	31-May-2021 Filing particid		
Filing option Filing option Is this a nil return? Yes No Select an option Total sales and purchases Cancel Save Draft	•	C Previous Next >	

You'll notice the cleaner look and feel continues through to the form, but the information you need to complete is the same.

ntermediary centre		Inte	rmediary centre Alerts	
Filters	QST - All Actions	- F	ilters	All Actions -
T (ge to film			ia	)
GST CLIENT 10 000-000-001-057003	You have a payment due now true spayment new to stag any penalties and interest. Make a payment	0	<b>ST</b> JENT 10 10-000-001-GST005	Your 31-May-2021 return was due on 28-Jun-2021 X Your studied this may make a late tiling penalty. Yes per vision Yes per vision
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	Make + payment			<ol> <li>View during allocations</li> </ol>
Filt	ered by GST account type			Free text search on 'File'

- For tax intermediaries, you will also have consolidated alerts in the Intermediary centre for the clients you're subscribed to.
- Alerts can be filtered for example you can filter the account type for 'GST' for all GST-related tasks.
- You can also use the free text filter to search in this example the search is for 'file' and it has brought up list of all the returns that are ready for filing, not just GST.
- From there you'll be able to click on the links to file returns.
- Note that, for those client accounts you aren't subscribed to, you can search for them by IRD number or name to access their customer account first or access them from Favourites if you have them set up there.

 BLOGGS BUSINESS LTD 111-111-111 1 FARE STREET, FARETOWN 6011 Summary Alerts • I want to		Welcome, Joe Bloggs You last lugged in an Munday, May 12, 2021 Bio225 Ann Manage my profile	
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Income tax ELCOGIS BUSINESS LTD 111-111-111-INCOD2 Alerts	Total balance: \$50.00 Due now: \$50.00	Make a payment     Auturn and transactions     Isozone aurinnay     More	
Payroll BLOGGS BUSINESS LTD 111-111-111-DMPD04	30-Jun-2021	Express file transfer     File or upload a networe	
	Total balance: \$0.00 Due now: \$0.00	Employees     Make a payment     Fetures and transactions     Mon	

- For all customers, another way to file returns is from the account panels.
- In the customer landing page, look for the panel of the account type you want to file a return for. We'll continue using the GST example and have highlighted the GST panel.
- Remember that the links on the GST panel relate to GST tasks. If you want to file an Income tax return, for example, you'll go through the Income tax panel.

Inland Revenue Te Tari Taake	Filing, viewing and amending – from account pane
BLOGGS BUSINESS LTD 15-11-11 1 Kard Straft Anathown 601: Sommary Alerts • I want to GST BLOGGS BUSINESS LTD 11-111-111-021005 Arrt •	Welcome, Joe Bloggs Twa and agged in an Annual Welcome, Joe Bloggs Total balance: \$698.38 Marke a payment Det new 598.38 Mone
	Exceeds augments offer
	31-64/3021 \$394.73 ▲ Main & pagment (Due 10-Aug-2021) 31-84gg-3021 \$500 ▲ His return (Due 28-5un-3021)

- On the GST account panel there is a link in the options menu on the right hand side called 'Returns and transactions'.
- Clicking that will take you to a screen with two tabs 'Returns' and 'Periods'.
- Use the 'Returns' tab to select and file a GST return.
- The 'Period' tab shows you all the transactions for a given period.



## Filing, viewing and amending – from account panels

#### Filing, viewing and amending - 'returns and transactions'

GST 111-111-GST004 BLOGGS BUSINESS LTD				
Periods Returns				
Return list				Ŧ
Period	Return	Status		
30-Sep-2021	GST return	Expected	File now	
31-Jul-2021	GST return	Late-processed	View or amend return	
31-May-2021	GST return	Overdue	File now	

- In the returns tab you'll see a list of GST returns for different periods. You can also see the status including whether it's due now, overdue or has already been filed.
- From here you can select the return you want to file and click 'File now'.
- You can also select previously filed returns and view or amend them.

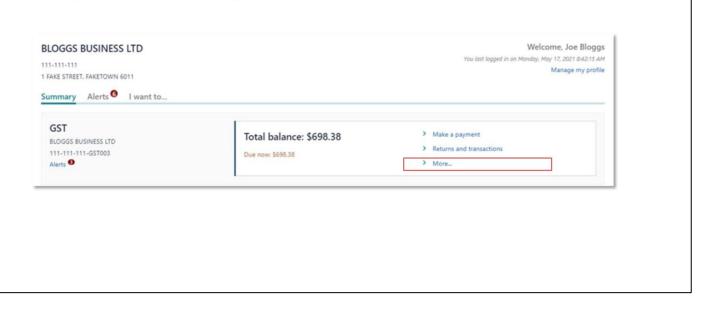
Inland Revenue Te Tari Taake	Tax interme	diaries – using client account panels
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• Tax intermediaries can also use the alerts tab and the 'Returns and transactions' links for the client accounts they have access to; and for their own account.



Filing, viewing and amending - from account panels

## Filing, viewing and amending - 'More...'



- There's another way of filing returns from the account panel but it's a slightly longer route.
- You can go to 'More' in right hand links menu.

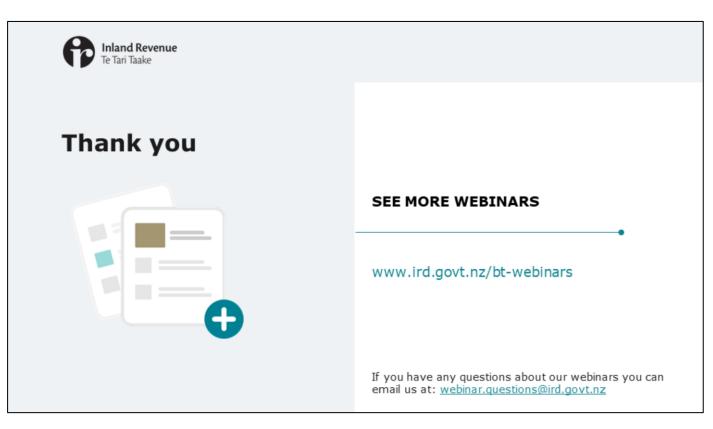


## Filing, viewing and amending - from account panels

#### Selecting 'More...' on a GST panel will take you to the GST related activities

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- Here you can select from two options:
  - 'File a return' which will take you straight to the return periods list.
  - 'Returns and transactions' which takes you to the same place as before with the Returns and Periods tabs.
- Like before, you can file, view and amend a return from here.
- This screen shows an example of what a tax intermediary will see if they are filing for a client. The same options are available for individuals or businesses accessing their own accounts.



- This webinar has given an overview of how you will file, view and amend returns when we upgrade myIR.
- You'll find more webinars about the final Business Transformation Release on our website at www.ird.govt.nz/bt-webinars.
- Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.