
Filing, viewing and amending in myIR

IR Business Transformation

OCTOBER 2021

Purpose



www.ird.govt.nz/bt-webinars
webinar.questions@ird.govt.nz

Information is correct as at October 2021

FILING, VIEWING AND AMENDING RETURNS

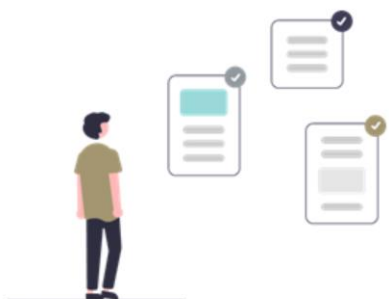
FOR

- Tax intermediaries
- Businesses
- Individuals

TOPICS

- Navigating account panels – recap
- Filing from the alerts tab
- Tax intermediaries – consolidated alerts
- Filing, viewing and amending from account panels

- 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.

Navigation – general

The screenshot displays a web application interface. On the left is a sidebar with a 'Personnel' link highlighted, along with 'Search' and 'History' links. The main content area is titled 'Select a customer:' and contains a table of customer information. The table has columns for 'Name', 'Email', and a status indicator. The first row shows 'CLIENT 10' with email '10@10-10-10' and '1 outstanding alert'. The second row shows 'CLIENT 6' with email '6@6-6-6' and '1 outstanding alert'. The third row shows 'CLIENT 18' with email '18@18-18-18' and '1 outstanding alert'. On the right side of the main content area, there is a 'Logon details' section showing 'customer@bnet.com' and a 'Select a customer:' dropdown menu. The top of the page shows 'Welcome, TA Dasher' and 'You are logged in as Administrator'.

[illegible]

Individual customer account

Access to multiple customer accounts

- 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.

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111-111-111
1 KAKE STREET, KAKETOWN 6011

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 8:42:11 AM
[Manage my profile](#)

[Summary](#) [Alerts](#) [want to...](#)

GST
BLOGGS BUSINESS LTD
111-111-111-GST003
[Alerts](#)

Income tax
BLOGGS BUSINESS LTD
111-111-111-INC002
[Alerts](#)

Payroll
BLOGGS BUSINESS LTD
111-111-111-EMP004

Total balance: \$698.38
Due now: \$698.38

[Make a payment](#)
[Returns and transactions](#)
[More...](#)

Total balance: \$50.00
Due now: \$50.00

[Make a payment](#)
[Returns and transactions](#)
[Income summary](#)
[More...](#)

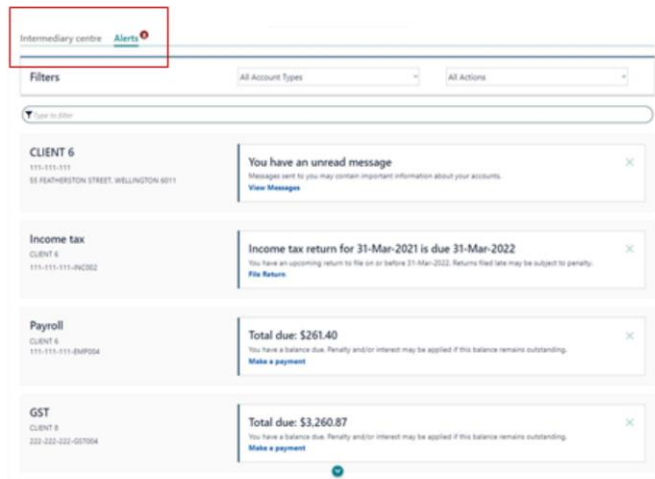
30-Jun-2021

[Express file transfer](#)
[File or upload a return](#)

Total balance: \$0.00
Due now: \$0.00

[Employees](#)
[Make a payment](#)
[Returns and transactions](#)
[More...](#)

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



Intermediary 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 login.

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[Summary](#)

[Alerts](#) 6

[I want to...](#)

GST

BLOGGS BUSINESS LTD

111-111-111-GST003

[Alerts](#) 1

Total balance: \$698.38

Due now: \$698.38

[➤ Make a payment](#)

[➤ Returns and transactions](#)

[➤ More...](#)

- 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.

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Welcome, Joe Bloggs
You last logged in on Thursday, Sep 23, 2021 8:24:30 AM
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Summary **Alerts** [I want to...](#)

Type to filter

GST BLOGGS BUSINESS LTD 139-626-141-GST004	You have a payment due now You have \$934.73 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 Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfilled this may mean a late filing penalty. File your return
Income tax BLOGGS BUSINESS LTD 139-626-141-INC002	You have a payment due now You have \$50.00 due for 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.

< BLOGGS BUSINESS LTD

GST return

31-May-2021

GST

111-111-111-GST004

BLOGGS BUSINESS LTD

31-May-2021

Filing period

GST return



Filing option

Filing option

Is this a nil return?

Yes

No

Select an option

Total sales and purchases

Cancel

Save Draft

< 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.

Tax intermediaries – consolidated alerts

Intermediary centre Alerts

Filters All Actions

Type to filter

GST

CLIENT 10
000-000-001-GST003

You have a payment due now

You have \$0.000.00 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

Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfilled this may mean a late filing penalty.

[File your return](#)

GST

CLIENT 6
111-111-111-GST004

1 unread letter

You have an unread letter.

[View unread letter](#)

You have a payment due now

You have \$0.000.00 due for payment now. Make a payment now to stop any penalties and interest.

[Make a payment](#)

Filtered by GST account type

Intermediary centre Alerts

Filters All Account Types All Actions

Type to filter

GST

CLIENT 10
000-000-001-GST003

Your 31-May-2021 return was due on 28-Jun-2021

Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfilled this may mean a late filing penalty.

[File your return](#)

Income tax

CLIENT 10
222-222-222-INC002

Your 31-Mar-2021 return was due on 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfilled this may mean a late filing penalty.

[File your return](#)

Income tax

CLIENT 6
111-111-111-INC002

Your 31-Mar-2021 return was due on 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfilled this may mean a late filing penalty.

[File your return](#)

[View dismissed alerts](#)

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.

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GST
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[Alerts](#)

Total balance: \$698.38
Due now: \$698.38

- [Make a payment](#)
- [Returns and transactions](#)
- [More...](#)

Income tax
BLOGGS BUSINESS LTD
111-111-111-INC002
[Alerts](#)

Total balance: \$50.00
Due now: \$50.00

- [Make a payment](#)
- [Returns and transactions](#)
- [Income summary](#)
- [More...](#)

Payroll
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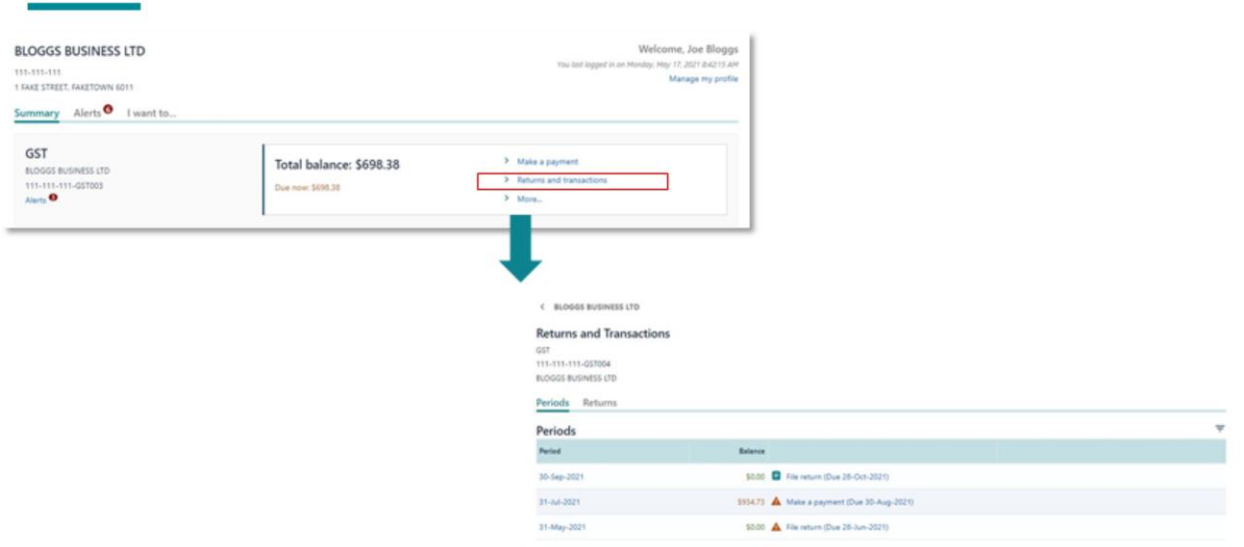
30-Jun-2021

- [Express file transfer](#)
- [File or upload a return](#)

Total balance: \$0.00
Due now: \$0.00

- [Employees](#)
- [Make a payment](#)
- [Returns and transactions](#)
- [More...](#)

- 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.



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GST
BLOGGS BUSINESS LTD
111-111-111-GST003
[Alerts](#)

Total balance: \$698.38
Due now: \$698.38

- Make a payment
- Returns and transactions**
- More...

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Returns and Transactions
GST
111-111-111-GST004
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[Periods](#) [Returns](#)

Period	Balance	
30-Sep-2021	\$0.00	File return (Due 28-Oct-2021)
31-Jul-2021	\$934.73	Make a payment (Due 30-Aug-2021)
31-May-2021	\$0.00	File return (Due 28-Jun-2021)

- 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 – ‘returns and transactions’

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Returns and Transactions

GST

111-111-111-GST004

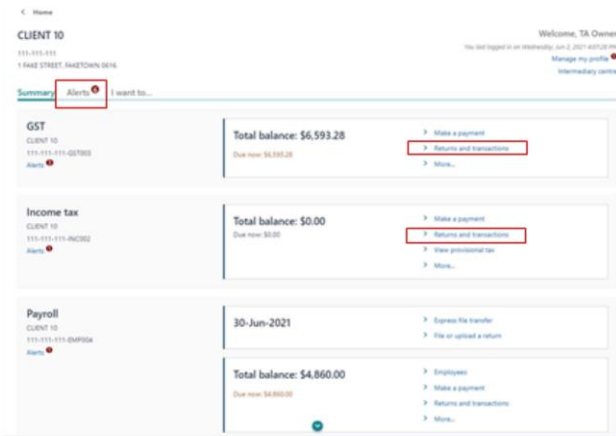
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Periods Returns

Return list

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.



Tax intermediaries use the same pathways to file, view and amend returns using:

- the client's account panels
- the client's alerts tab
- their own account panels and alerts (to file their own GST)

- 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 – 'More...'

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You last logged in on Monday, May 17, 2021 8:42:15 AM
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[Summary](#) [Alerts ⁵](#) [I want to...](#)

GST
BLOGGS BUSINESS LTD
111-111-111-GST003
[Alerts ¹](#)

Total balance: \$698.38
Due now: \$698.38

[> Make a payment](#)
[> Returns and transactions](#)
[> 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.

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

CLIENT ID

More...

007

CLIENT ID

More...

What are you looking for?

Communicating with IR

Send us a message through myIR.

My details

Update refund bank account

Add or change the bank account details we pay refunds to.

Manage account

View account registration details

View or update your account details, such as payment options, filing frequency and refund bank account.

Cancel account registration

Cancel a registration for a specific account (tax type).

Update GST account details

Make changes to your GST registration details, including how you account for GST.

Register as a GST group

Register as a GST group so one member can file GST returns for all companies and/or persons included in the group.

Payments, refunds and returns

Returns and Transactions

View, file, or amend returns, or view your account transactions.

File a return

File a return for a specific tax return period.

Make a payment

Set up or make a payment by direct debit or credit card.

Manage payments and returns

View the status of your returns, balances, and payments.

Where is my refund?

Search for any refund by amount, date range or refund status.

Reports

GST return summary report

Get a summary of GST returns filed.

Transaction summary report

Get a detailed report of this account's transactions.

Work out penalty and interest

Estimate the total amount to pay including penalties and interest.

'File a return' takes you to the return periods list

Business Summary LTD

Returns and Transactions

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Periods Returns

Return list

Period	Return	Status	Action
30 Sep 2021	GST return	Submitted	File now
31 Jul 2021	GST return	Late or missed	View or amend return
31 May 2021	GST return	Overdue	File now

'Returns and transactions' takes you to the screen with the Returns and Periods tabs

Business Summary LTD

Returns and Transactions

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Periods Returns

Periods

Period	Balance	Action
30 Sep 2021	\$0.00	File return (Due 30 Sep 2021)
31 Jul 2021	\$104.75	Make a payment (Due 31 Aug 2021)
31 May 2021	\$0.00	File return (Due 30 Jun 2021)

- 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.

Thank you



SEE MORE WEBINARS

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If you have any questions about our webinars you can email us at: webinar.questions@ird.govt.nz

- 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.