



This summary accompanies a webinar: *Filing, viewing and amending returns in myIR*

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Introduction

In the upgraded version of myIR you can file a return:

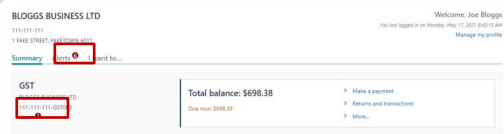
- using the alerts tab, and
- through the account panels

It is easy to find returns you've filed if you want to view or amend them

The return itself has the same fields as now



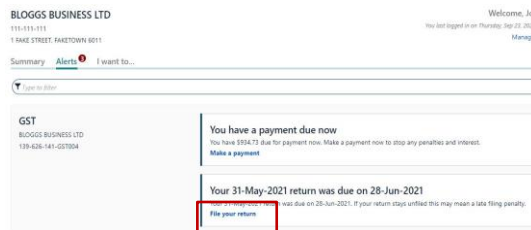
Filing from the alerts tab



The simplest way to file returns is through the alerts tab.

Taking 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 the number of alerts, for all tasks



Go to the Alerts tab

Find the panel with the GST return

Click the 'file a return' link

It will open that specific return for you to complete



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

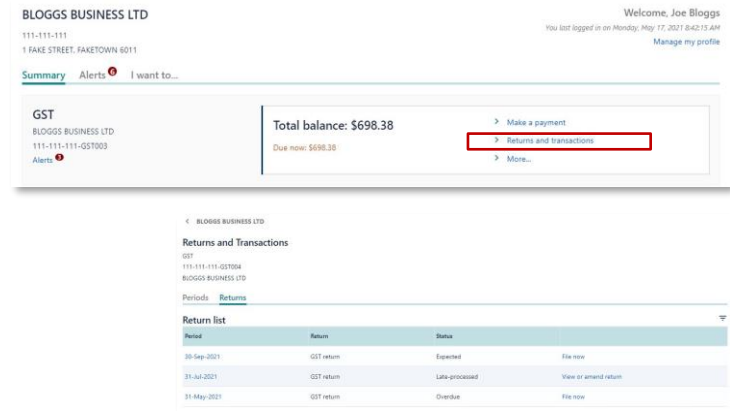
Filing, viewing and amending – from account panels

Look for the account panel (eg GST) on the customer landing page
In the options menu (right hand side) click on 'Returns and transactions' - it will take you to a screen with two tabs: 'Returns' and 'Periods'.

Use the 'Returns' tab to select and file a GST return.

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.

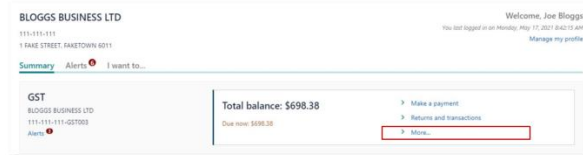
Period	Return	Status	File now
30 Sep-2021	GST return	Expected	File now
31 Jul-2021	GST return	Late-processed	View or amend return
31 May-2021	GST return	Overdue	File now

You can also go to 'More' in right hand links menu. It's a slightly longer route for filing.

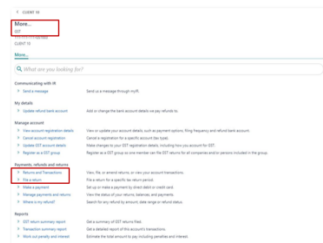
You can select from two options:

- 'File a return' takes you straight to the return periods list.
- 'Returns and transactions' takes you to the Returns and Periods tabs.

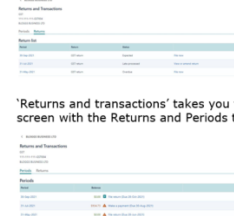
Like before, you can file, view and amend a return from here.



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



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



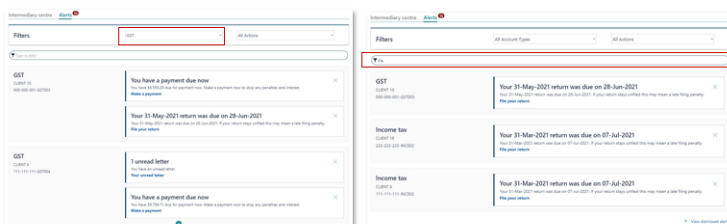
'Returns and transactions' takes you to the screen with the Returns and Periods tabs

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.

See next page for more information for tax intermediaries

Filing through alerts

Consolidated alerts



Filtered by GST account type

Free text search on 'file'

Tax intermediaries will also have consolidated alerts in the Intermediary centre for the clients they are subscribed to.

Alerts can be filtered – eg on account type for 'GST' for all GST-related tasks.

You can also use the free text filter to search – eg the search for 'file' will bring up a 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.

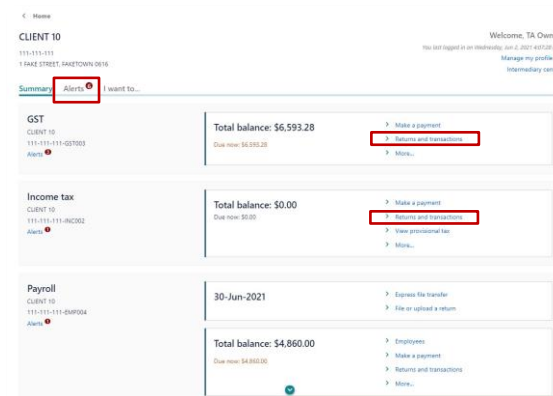
Filing using client account panels

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)



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