

# Filing, viewing and amending returns in myIR



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

ird.govt.nz/bt-webinars

### 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

BLOGGS BUSINESS LTD	Welcome, Joe Nov lint bigged in or Plurating for \$2,2,2021 if Meanage				
ummary Alerts I want to					
Type to lifter					
GST BLOGGS BUSINESS LTD 139-626-141-GST904	You have a payment due now to have a payment now to also any penalties and interest.  Mails a payment.				
	Your 31-May-2021 return was due on 28-Jun-2021				
	one at mergionical room was due on 28-Jun-2021. If your return stays unfilled this may mean a late filing penalty:  File your return				

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

CST return
31-May-2021
Street Street

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

Welcome, Joe Bloggs fin on Monday, May 17, 2021 842:15 AN



## Filing, viewing and amending returns in myIR

## 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.

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To the treatment of the and click 'File

Returns and Transactions

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Return list

Return

**BLOGGS BUSINESS LTD** 

Summary Alerts 1 want to

1 FAKE STREET, FAKETOWN 6011

BLOGGS BUSINESS LTD

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.

BLOGGS BUSINES	N 6011			You let		felcome, Joe Blo oy, May 17, 2021 8421 Manage my pr	SAM	
GST BLOGGS BUSINESS LTD 111-111-111-GST003 Alerts	1	Total balance: \$698.38 Our now: \$698.38	3.1	dake a payment leturns and trans dons	actions			
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My details  3: Updas refund bank account  Manage account  3: Size account regionalize details  3: Cancel account regionalize details  3: Updas CIT account details  3: Regions of CIT account details  4: Regions of CIT account details  5: Regions of CIT account details  6: Regions of CIT account details  7: Regions of CIT account details  8: Regions of CIT account details  9: Regions of CIT account details  9: Regions of CIT account details  10: Regions of CIT accou	Add or othergorthe bank account details on pay ordered to.  Year or update your account details, such as payment options, filing free parties of the parties of the payor account details, such as payment options, filing free parties account on the payor.  Nation designed by pay CET represents which, including free you account depays or payor account of the payor ac	de III.	screen	with the		ns' takes y and Perio		
Seturn and Tensetions     Site and unit     Water approximates	View, file, or amend indures, or view your account framewhore.  File a return for a specific ten return period.  Set up or make a payment by direct debit or credit card.		07 11.00 00 00 00 00 8.000 8.000 00					

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.

Total balance: \$698.38

See next page for more information for tax intermediaries





## Filing, viewing and amending returns in myIR

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.

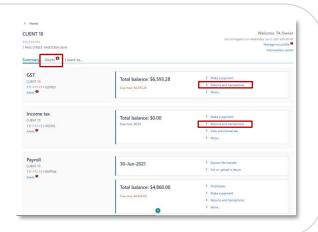
## Filing using client account panels

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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