
Introducing the myIR upgrade

IR Business Transformation

JULY 2021

Purpose



INTRODUCING THE MYIR UPGRADE

FOR

- Tax intermediaries
- Businesses and employers
- Individuals and families

TOPICS

- Introduction
- Look and feel
- Introducing navigation
- Mobile devices

- Welcome to this webinar about Inland Revenue's upcoming myIR upgrade.
- This presentation provides a quick introduction to this change.
- It may be useful for tax intermediaries, businesses and individuals and families.



- Upgrading myIR – planned for October 2021
- A version upgrade - not a new system
- We are in the testing phase: **designs may change**
- It doesn't change what you do in myIR: it may change where you find things
- Child support customers will see more changes

- Over the last few years we've been introducing a whole new tax system, gradually moving all our tax and social policy products into it.
- This year we'll be upgrading this system, so you'll have the latest version of myIR. It is planned for October and will be one of the final steps in our Business Transformation programme before it closes out.
- Most of the changes are standard 'out of the box' improvements but we are customising some elements to reflect our customers' specific needs. We are currently in the testing phase. The designs may still change slightly.
- The first thing to emphasise is that this is just an upgrade – like you've probably seen in other software and apps – it's not a new system. It doesn't change what you do in myIR but there are changes to how it looks and where you find things.
- All customers who use myIR will notice changes. How much will depend on the extent you use it and the complexity of your needs.
- One area that will have more change is the child support functionality. This is the final social policy product that we are moving into our new system in October. (There will also be some child support legislation changes that we'll talk about separately).

Welcome to Inland Revenue's Secure Online Services [Privacy and Security Policy](#) | [Contact us](#)

myIR | Home Welcome, Example Customer [Settings](#) [Log Off](#)

Customer
Example Customer
ngaire.causer@test.id.govt.nz
Last logged on 01-Jun-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](#) >
[Apply for Resurgence Support](#) >

Accounts Submitted Correspondence Names and addresses Logons

☒ All accounts (tax types) that you can access [View accounts >](#)

| | | |
|---|---|--|
| Dividend withholding ta... 111-111-111-DWT003 BUILDING HOUSES COMPANY 123 NOWHERE STREET, SOMEVH... | GST > 111-111-111-GST004 BUILDING HOUSES COMPANY 123 NOWHERE STREET, SOMEVH... Needs Attention | Income tax > 111-111-111-INC002 BUILDING HOUSES COMPANY 123 NOWHERE STREET, SOMEVH... |
| Payroll > 111-111-111-EMP005 BUILDING HOUSES COMPANY 123 NOWHERE STREET, SOMEVH... | | |

Current version

BLOGGS BUSINESS LTD
111-111-111
1 FAKE STREET, FAKETOWN 6011

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 6:42:15 AM
[Manage my profile](#)

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

GST
BLOGGS BUSINESS LTD
111-111-111-GST003
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
BLOGGS BUSINESS LTD
111-111-111-EMP004

30-Jun-2021

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

[Express file transfer](#)
[File or upload a return](#)
[Employees](#)
[Make a payment](#)
[Returns and transactions](#)
[More...](#)

New version

Cleaner, tidier and easier to see what's on screen

The first thing you're likely to notice in the new version of myIR are changes to the look and feel.

The new version is cleaner and tidier making it easier to see what's on the screen.

Here's an example of how it will look compared to how it looks now. This is an example for a business, but the look and feel will be the same for all customers.

You'll notice the panel format in the new version - rather than the busier tiles, tabs and lists we have now.

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In the new version it will be a lot simpler to see your (or your clients') accounts....

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...any payments due on them...

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...and to take action if needed.



The navigation will make it easier to search for and find information

You'll find more information on the landing page

- Then there's the navigation which will be simpler, making it easier for you to search for, find and manage information.
- Although it has a lot more white space, the new version brings more information to the landing page, including the most common information you'll need...

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...like the total balance on an account...

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...what's due for payment now...

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....links to actions you can take on an account, and...

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...which accounts have alerts that need attention.

This reduces the need to navigate through the system and reflects customer requests to see more information on the landing page.

We'll talk about these functions in more detail in separate webinars.

Logon details
Customer
customer@test.com

Select a customer:

All

Type to filter

Company
111-111-111
▲ 4 outstanding alerts

Customer, First
111-111-111
▲ 3 outstanding alerts

Customer, Second
111-111-111

Customer, Third
111-111-111

Welcome, Customer
You last logged in on Friday, Oct 1, 2021 9:45:44 AM
[Manage my profile](#)

BUILDING HOUSES COMPANY
111-111-111
123 NOWHERE ROAD, SOMEWHERE, CITY 7123

Summary

Alerts

I want to...

My activity

Search submissions

Communicating with IR

My details

COVID-19 support

Access management

Payments, refunds and returns

Search submissions you've made

Send a message

Add or delete your bank account number for refunds

Manage access for nominated persons, tax intermediaries and other parties, and manage your mail redirects and refunds with your tax agent

Request an instalment arrangement

View messages sent between you and the agency

View or manage names and addresses

Notify us that you have been impacted by COVID-19

Manage access to this customer

Set up a recurring direct debit to prepay a future obligation

View letters sent by the agency

View your IRD number(s) and information

Apply for a Small Business loan as part of the New Zealand Government's support for businesses affected by COVID-19

View the status of your returns, balances, and payments

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

Upload a document using the unique code which IR has provided

Used to add, update, and cease BIC codes for a customer

Apply for a Resurgence Support Payment loan as part of the New Zealand Government's support for businesses affected by COVID-19

More payment options

Submit an application to receive a ruling on one or multiple issues

To find information:

- You'll be able to filter some screens to show just what you're looking for, like in the list of customer accounts.
- On other screens you can search for key words, like in the list of tasks under the 'I want to' tab.

We know you'll be familiar with the current structure but once you find where you're going, the steps you take and fields you fill in are the same as now.

Last viewed:
CLIENT 6

Welcome, TA & BK
You last logged in on Thursday, Jan 28, 2021 9:22:56 AM

[Manage my profile](#)
[Intermediary centre](#)

Select a customer:

[Favourites](#) [Search](#) [History](#)

3 favourites

[Manage favourites](#)

Type to filter

CLIENT 6

111-111-111

4 outstanding alerts

CLIENT 10

111-111-111

2 outstanding alerts

CLIENT 18

111-111-111

2 outstanding alerts

If you're a tax intermediary, the landing page will look a bit different. For example you'll see:

- A favourites tab for up to 50 clients you want to access quickly. You can use the filter bar on this page to find a client.
- A place to manage your favourites list.
- A search tab where you can find a client by IRD number, name or customer identification number.
- A history tab with the last 10 clients accessed.
- A new intermediary centre that will replace the tax preparer tab.
- You'll also see which of your favourited clients have outstanding alerts that need attention.

These are just examples of some of the things for tax intermediaries. We'll talk about these in more detail in a separate webinar.



- A fully dynamic design
- Seamless experience on any device
- All functionality available across all devices

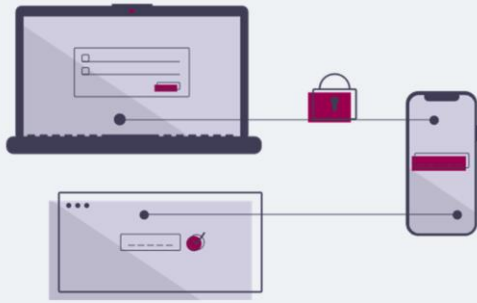
- Another improvement is that whatever device you use to access myIR – for example your phone, tablet or laptop – content will automatically re-size if the device's display is large enough, and if not, it will stack and wrap content within panels.
- And unlike now, all functionality will be available across all devices.



- Helping you find your way around
- Short webinars, summary sheets and updates
- How-to guidance on myIR
- Guidance on the new child support functionality

- The changes are designed to make it easier for you to use myIR but like any change there may be a period of adjustment as you find your way around.
- We will help you build familiarity with the new version before we switch over.
- This includes a series of very short webinars, like this one, which will be accompanied by quick summaries of the key points. There will be more detailed guidance available when we get closer to the upgrade.
- Child support customers will also learn more about how to use the child support functionality as we finalise the designs. And, of course, we'll support you through the upcoming child support legislation changes.

Thank you



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

FOR MORE INFORMATION

Visit our website

[What's changing in 2021](https://www.ird.govt.nz/business-transformation-2021)

[ird.govt.nz/business-transformation-2021](https://www.ird.govt.nz/business-transformation-2021)

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