

This summary accompanies a webinar: *Navigating the new version of myIR*

It is aimed at:

- Tax intermediaries

ird.govt.nz/bt-webinars



Introduction

Navigation – one of the main things that’s changing in the myIR version upgrade

What you do in myIR will be the same

Cleaner, simpler navigation

Fewer clicks



Finding and accessing client accounts

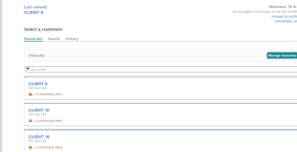
Logon access and security are the same as now

Favourites Search History



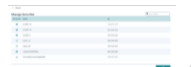
Favourites tab

Up to 50 clients



Manage favourites

Add or remove clients from favourites



Search tab – find clients by

- IRD number
- Client name
- Customer identifier



History tab

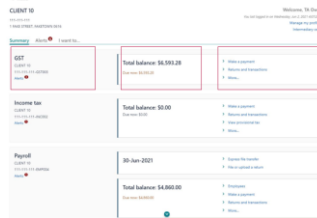
The latest (up to) 10 clients accessed



Account panels

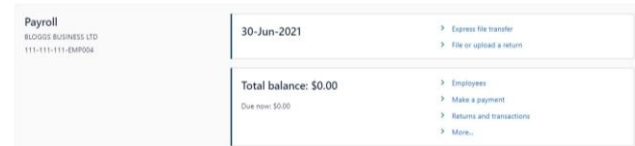
- Account type and customer information
- Total balance and payments due
- Links to tasks for each account
- Alert indicators

All brought up to landing page level



Sub-panels

- Provide account-specific information
- Account panels are always there; others appear when relevant



Tabs

Three top tabs on a customer account screen

Customer, Individual

111-111-111
123 NOWHERE STREET, SOMEWHERE CITY 5510

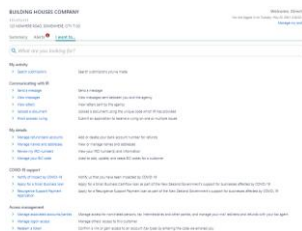
Summary Alerts ³ I want to...

- Summary: list of accounts
- Alerts: tasks that need action
- I want to: list of all tasks

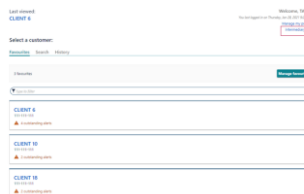
'I want to' tab

Customer's tasks are categorised so they are easier to find, eg:

- My activity
- Communicating with IR
- My details
- Access Management



Intermediary centre



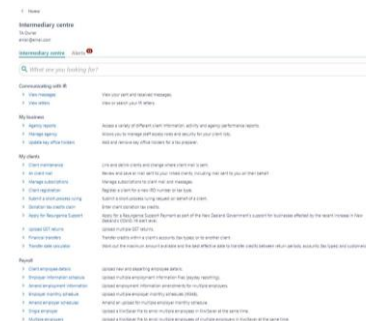
- Easy to find and access
- Replaces the current Tax preparer tab
- One-stop shop for completing tasks and viewing notifications on behalf of your clients

Small changes to the ordering

Links are grouped so it's easier to navigate - based on intermediary feedback sessions.

If you subscribe to clients you can:

- receive all notifications in the Intermediary centre; and
- view the alerts for subscribed customers in the Alerts tab.



MORE INFORMATION

Visit our website

[What's changing in 2021](#)

ird.govt.nz/business-transformation-2021

Watch our webinars

[Business Transformation webinars](#)

www.ird.govt.nz/bt-webinars

Webinar.questions@ird.govt.nz

Filtering and searching

- Some screens will let you filter the information on that page (it's not a site-wide filter)
- Some screens will have a search bar where you can search using key words

