

---

# Navigating the new version of myIR

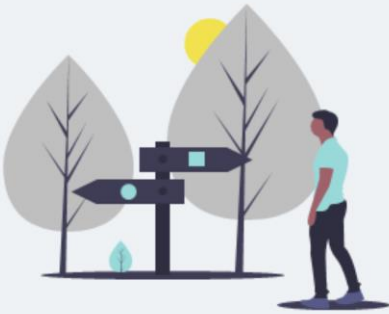
For tax intermediaries

---

IR Business Transformation

JULY 2021

## Purpose



[www.ird.govt.nz/bt-webinars](http://www.ird.govt.nz/bt-webinars)  
[webinar.questions@ird.govt.nz](mailto:webinar.questions@ird.govt.nz)

## NAVIGATING THE NEW VERSION OF MYIR

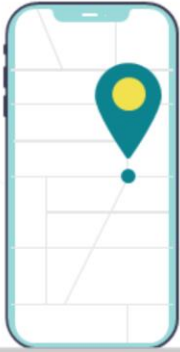
### FOR

- Tax intermediaries

### TOPICS

- Getting into myIR
- Accessing client accounts
- Account panels
- Tabs
- Intermediary centre
- Finding information

- Welcome to this webinar about navigating the new version of myIR, coming in October.
- It provides information about the access and navigation specific to tax intermediaries. If you are not a tax intermediary you may prefer to watch our webinar on navigating the new version of myIR for businesses, employers, individuals and families.
- Please note that the content of this webinar is correct as at 12 July 2021 but may be subject to change.
- If you have any questions arising from this webinar please send them to [webinar.questions@ird.govt.nz](mailto:webinar.questions@ird.govt.nz).
- If you have specific questions about your account, please send them via myIR.



- Navigation – one of the main things that’s changing with the myIR version upgrade
- What you do in myIR will be the same
- Cleaner, simpler navigation
- Fewer clicks

[www.ird.govt.nz/bt-webinars](http://www.ird.govt.nz/bt-webinars)

- In this webinar we will look at some of the main changes to the navigation in myIR – this is one of the things that will change the most.
- It’s important to keep in mind that what you do in myIR will be the same, but you should find that the information is organised in a cleaner, simpler way.
- The new version of myIR also brings more information forward so, for the most part, there’s fewer clicks to get to where you want to go.

## Logon details

TA Owner  
email@email.com

Welcome, TA Owner

You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM

[Manage my profile](#)   
Intermediary centre

## Select a customer:

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

3 favourites

[Manage favourites](#)

Type to filter

### CLIENT 10

111-111-111

 6 outstanding alerts

### CLIENT 6

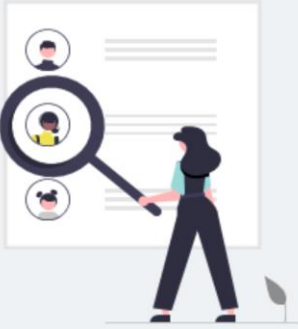
222-222-222

 5 outstanding alerts

CLIENT 18 

- Here's a reminder of the new look.
- You'll notice there are panels for different account types. You'll hear about these panels a lot as they are a key part of the new design.
- The panels replace the 'tile view' and 'list view' that you currently see and which change depending on how many clients or accounts you are looking at.

# Finding and accessing client accounts



## TOPICS

---

- Logging on
- Search tab
- Favourites tab
- Last viewed
- History tab

First we'll look at how you'll find and access client accounts.

## Logon details

Owner  
owner@taxagency.com

Welcome, Owner

You last logged in on Friday, Oct 1, 2021 1:10:33 PM

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

Select a customer:

## Search

### Access a client

Id type

IRD number

Client IRD number

Access

- Logging on to myIR will be the same as now - access and security will be the same.
- When you first log on to myIR, you will see the search tab.
- Here you can search for anyone on your client list. You can search by:
  - IRD number
  - Client name, or
  - Customer identifier.
- We've listened to feedback from intermediaries and are pleased to provide the ability to search by the client name – this is a new addition to help you quickly find clients without having to look up their IRD number or customer identifier.

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

You will also be able to add up to 50 clients to a favourites tab. This favourites list relates to your specific logon.

You can use the filter bar to search for clients in your favourites list.

The 'manage favourites' button takes you to a screen where you can add or remove clients from your favourites list.

&lt; Home

## Manage favourites

Type to filter

Favourite	Name	ID
★	CLIENT 10	111-111-111
★	CLIENT 18	222-222-222
★	CLIENT 6	333-333-333
☆	Client, 13	444-444-444
☆	Client, 38	555-555-555
★	LARGE ENTERPRISE	666-666-666
☆	TAX AGENT & BOOKKEEPER	777-777-777

OK

In the 'Manage favourites' screen, you can click on the stars to add or remove clients from the list.

On day one, when you first log on you will be able to manage your clients and mark them as a favourite. To set up your personal favourites you can select clients under the 'manage favourites' which will display a pre-populated list of your currently subscribed clients.

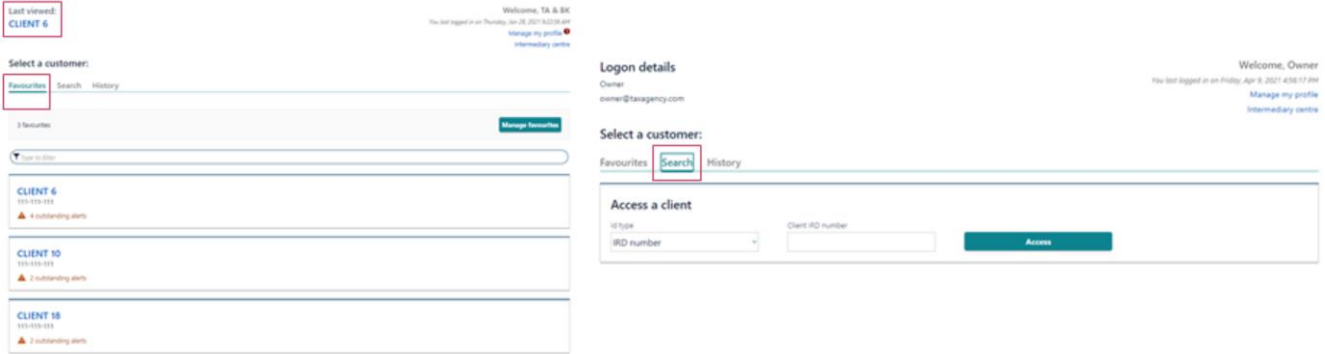
If you previously weren't subscribed to any clients. When you first log on you will not get the 'favourites' tab and will first need to subscribe to clients or search and access them so they appear in the 'Manage favourites' list and can be added.

From then on:

- The clients you have subscribed to will appear on your 'Manage favourites' list whenever you log on.
- Other clients that you access during a session will be on your 'Manage favourites' list for the duration of the session.
- Once you have made a client a favourite, they will appear on your favourites tab whenever you log on.

As there is a maximum limit for favourites (50) and client subscriptions (1,250) we have added a message to help you when you've reached the maximum clients. When you are at the maximum and try to add another one, a message will appear advising that you have reached the limit and cannot add any more.





The screenshot displays the myIR user interface. At the top left, the Inland Revenue logo is visible. The main header area contains the title 'Finding and accessing client accounts'. Below this, the interface is divided into several sections:

- Last viewed:** A box labeled 'CLIENT 6' is highlighted with a red box.
- Welcome, TA & BK:** A message indicating the user is logged in on Thursday, 26/04/2021 10:29 AM, with a 'Manage my profile' link and 'Intermediary centre' text.
- Welcome, Owner:** A message indicating the user is logged in on Friday, April 9, 2021 4:58:17 PM, with a 'Manage my profile' link and 'Intermediary centre' text.
- Select a customer:** A section with tabs for 'Favourites', 'Search', and 'History'. The 'Favourites' tab is highlighted with a red box. Below the tabs is a search bar and a list of clients: CLIENT 6 (4 outstanding alerts), CLIENT 10 (2 outstanding alerts), and CLIENT 18 (2 outstanding alerts).
- Logon details:** A section showing the user's name 'Owner' and email 'owner@taxagency.com'.
- Select a customer:** A section with tabs for 'Favourites', 'Search', and 'History'. The 'Search' tab is highlighted with a red box.
- Access a client:** A section with a dropdown menu for 'IR type', a text input for 'Client IRD number', and an 'Access' button.

- Workspace isn't included in the new version of myIR, but the search and favourites tabs mean you can easily access your clients.
- You'll also be able to subscribe to up 1,250 clients to receive client alerts and mail notifications.
- Also, if you look up to the top left of the screen you'll see a record of the last customer you viewed – for if you want to quickly go back to that client's accounts.

Last viewed:  
**CLIENT 6**

Welcome, TA Owner  
You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM  
[Manage my profile](#)   
Intermediary centre

Select a customer:

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

Type to filter

**CLIENT 6**

111-111-111

 5 outstanding alerts

**Client, 38**

555-555-555

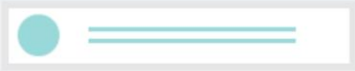
**LARGE ENTERPRISE**

666-666-666

 1 outstanding alert

- You will also see a tab called 'History' which will show you the most recent (up to) 10 clients you've accessed, whether or not they are on your favourites list.
- The history tab will remain, so the next time you log on you will see your recent history.
- On day one when you first log on, you won't see a History tab until you've accessed two customers.

## Account panels



### TOPICS

---

- Understanding the account panels
- Sub-panels
- Summary, Alerts and I want to tabs
- Task steps

Now we'll take a closer look at account panels.

< Home

## CLIENT 10

111-111-111  
1 FAKE STREET, FAKETOWN 0616

Welcome, TA Owner

You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM

[Manage my profile](#)

[Intermediary centre](#)

[Summary](#) Alerts 2 I want to...

<b>GST</b> CLIENT 10 111-111-111-GST003 Alerts <span>2</span>	<b>Total balance: \$6,593.28</b> <small>Due now: \$6,593.28</small>	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>
<b>Income tax</b> CLIENT 10 111-111-111-INC002 Alerts <span>1</span>	<b>Total balance: \$0.00</b> <small>Due now: \$0.00</small>	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">View provisional tax</a> <a href="#">More...</a>
<b>Payroll</b> CLIENT 10 111-111-111-EMP004 Alerts <span>1</span>	<b>30-Jun-2021</b>	<a href="#">Express file transfer</a> <a href="#">File or upload a return</a>
	<b>Total balance: \$4,860.00</b> <small>Due now: \$4,860.00</small>	<a href="#">Employees</a> <a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>

- Once you've selected a client you will see a panel for each of their accounts your logon has access to. For example, GST, Income tax and Payroll.
- Whether your client is an individual or a business the look, feel and navigation is the same.

< Home

## CLIENT 10

111-111-111  
1 FAKE STREET, FAKETOWN 0616

Welcome, TA Owner

You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM

[Manage my profile](#)

[Intermediary centre](#)

Summary Alerts 2 I want to...

<b>GST</b> CLIENT 10 111-111-111-GST003 Alerts <span>2</span>	<b>Total balance: \$6,593.28</b> Due now: \$6,593.28	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>
<b>Income tax</b> CLIENT 10 111-111-111-INC002 Alerts <span>1</span>	<b>Total balance: \$0.00</b> Due now: \$0.00	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">View provisional tax</a> <a href="#">More...</a>
<b>Payroll</b> CLIENT 10 111-111-111-EMP004 Alerts <span>1</span>	<b>30-Jun-2021</b>	<a href="#">Express file transfer</a> <a href="#">File or upload a return</a>
	<b>Total balance: \$4,860.00</b> Due now: \$4,860.00	<a href="#">Employees</a> <a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>

**Left:** Account type, customer information and alerts.

Let's take a closer look at the account panels.

- Firstly, they are listed alphabetically by account type.
- The account type is indicated on the left of the panel along with the customer identifying information (like the IRD number) and alerts.

< Home

## CLIENT 10

111-111-111  
1 FAKE STREET, FAKETOWN 0616

Welcome, TA Owner

You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM

[Manage my profile](#)

[Intermediary centre](#)

Summary Alerts 1 I want to...

<b>GST</b> CLIENT 10 111-111-111-GST003 Alerts <span>1</span>	<b>Total balance: \$6,593.28</b> Due now: \$6,593.28	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>
<b>Income tax</b> CLIENT 10 111-111-111-INC002 Alerts <span>1</span>	<b>Total balance: \$0.00</b> Due now: \$0.00	<a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">View provisional tax</a> <a href="#">More...</a>
<b>Payroll</b> CLIENT 10 111-111-111-EMP004 Alerts <span>1</span>	<b>30-Jun-2021</b>	<a href="#">Express file transfer</a> <a href="#">File or upload a return</a>
	<b>Total balance: \$4,860.00</b> Due now: \$4,860.00	<a href="#">Employees</a> <a href="#">Make a payment</a> <a href="#">Returns and transactions</a> <a href="#">More...</a>

**Left:** Account type, customer information and alerts.

**Middle:** Total balance and any payments due now.

- In the centre is information about the account including the total balance and any payments due now.

**Left:** Account type, customer information and alerts.

**Middle:** Total balance and any payments due now.

**Right:** Links to tasks for that account. The 'More' link takes you to the full list of tasks.

- On the right are links to common actions – like 'returns and transactions' and 'make a payment'. These links are specific to that panel.
- So 'make a payment' on an income tax panel will take you to the payment options screen for paying income tax; and the 'more' link will take you to all the tasks for income tax. The links from the GST tab will be for GST-related information and tasks. And so on. This makes it easy to take action on the account you're interested in. What you do when you access the task (eg file a return) is the same as today.
- The 'More' link on each panel takes you to the options that are currently dispersed throughout an account, period, and hidden within other screens in the account. For example, in the new version you'll find the 'Update investment percentage' option from the 'More' link on the income tax panel. Currently you'd have to go into the income tax account and then Earnings summary to find it.
- So unlike now, you won't click into an account – you'll click straight into the task for that account. The information has been brought up to this landing page level which means fewer clicks and less navigating.

**CLIENT 6**  
111-111-111  
111 9000 STREET, RANGIČIKA 7400

Welcome, TA Ouma  
You last logged in on Wednesday, Jul 2, 2017 4:17:04 PM  
[Manage my profile](#)  
[Intermediary user](#)

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

<b>Dividend withholding tax</b> CLIENT 6 Total balance: \$0.00 Alerts	<b>Account</b> 111-111-111-0267003 Due now \$0.00 Make a payment Returns and transactions More...
<b>GST</b> CLIENT 6 Total balance: \$9,798.71 Alerts	<b>Account</b> 111-111-111-027004 Due now \$3,277.87 Make a payment Returns and transactions More...
<b>Income tax</b> CLIENT 6 111-111-111-063802 Alerts	<b>Total balance: \$0.00</b> Due now \$0.00 Make a payment Returns and transactions View provisional tax More...

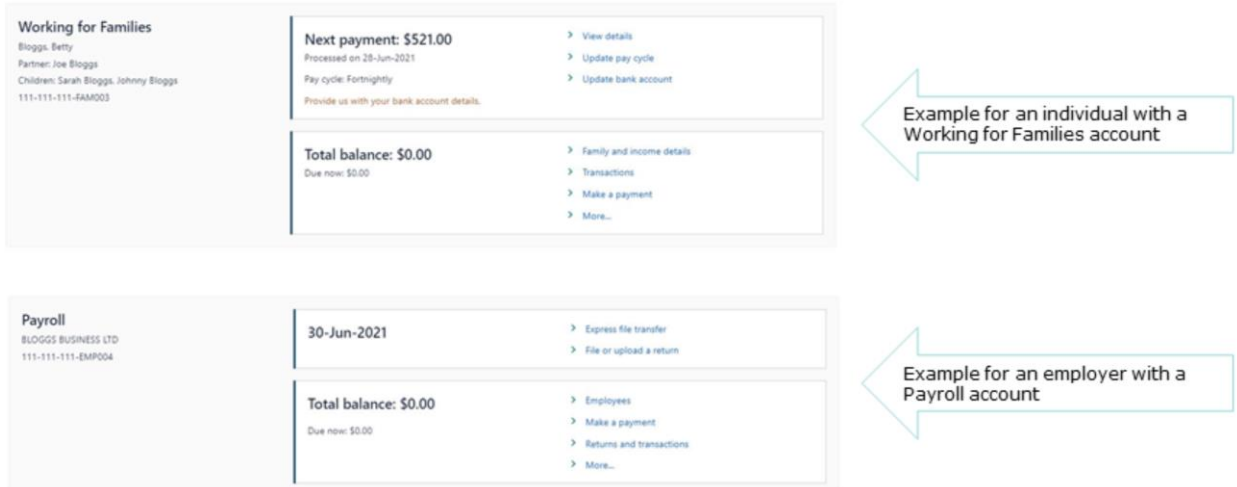
CLIENT 6  
**Make a payment**  
GST  
111-111-111-027004  
CLIENT 6  
**Make a payment**

**Payment options**

Set up a direct debit authority	A direct debit authority needs to be agreed to in order to set up direct debit payments from your bank account
Make a variable direct debit payment	Make a one off payment from your bank account
Make a credit card payment	Make a payment using your Visa or Mastercard credit or debit card
Send client a payment reminder	Send your client a payment reminder

- Here's an example of what you'll see if you click into the 'Make a payment' link on the GST account panel.





The image shows two examples of sub-panels within an Inland Revenue account interface. The top example is for a 'Working for Families' account, showing account details on the left and two sub-panels on the right. The first sub-panel displays 'Next payment: \$521.00' with a list of actions: 'View details', 'Update pay cycle', and 'Update bank account'. The second sub-panel shows 'Total balance: \$0.00' with actions: 'Family and income details', 'Transactions', 'Make a payment', and 'More...'. An arrow points to this example with the text 'Example for an individual with a Working for Families account'. The bottom example is for a 'Payroll' account, showing account details on the left and two sub-panels on the right. The first sub-panel displays '30-Jun-2021' with actions: 'Express file transfer' and 'File or upload a return'. The second sub-panel shows 'Total balance: \$0.00' with actions: 'Employees', 'Make a payment', 'Returns and transactions', and 'More...'. An arrow points to this example with the text 'Example for an employer with a Payroll account'.

- Within a panel there are sub-panels. The sub-panel called 'Account' is at the bottom of the panel and shows the account information. The Account sub-panel will always be there.
- Other sub-panels will appear at certain times and will provide information about a specific thing that's coming up.
- What they tell you will differ between accounts. In these examples we can see:
  - an individual's Working for Families account panel with a sub-panel saying when the next payment is due and how much it will be. This doesn't need to be actioned, it is for information only.
  - an employer's Payroll account panel with sub-panels saying when the next payroll dates are. Again, this is for information and doesn't need to be actioned at this time.

< Home

**CLIENT 10**  
111-111-111  
1 FAKE STREET, FAKETOWN 0616

Welcome, TA Owner  
You last logged in on Wednesday, Jun 2, 2021 4:07:28 PM  
[Manage my profile](#)  
Intermediary centre

**Summary** Alerts <sup>2</sup> I want to...

---

**GST**  
CLIENT 10  
111-111-111-GST003  
Alerts <sup>2</sup>

**Total balance: \$6,593.28**  
Due now: \$6,593.28

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

**Income tax**  
CLIENT 10  
111-111-111-INC002  
Alerts <sup>2</sup>

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

- > Make a payment
- > Returns and transactions
- > View provisional tax
- > More...

**Payroll**  
CLIENT 10  
111-111-111-EMP004  
Alerts <sup>2</sup>

**30-Jun-2021**

- > Express file transfer
- > File or upload a return

**Total balance: \$4,860.00**  
Due now: \$4,860.00

- > Employees
- > Make a payment
- > Returns and transactions
- > More...

- At the top of the customer screen, you'll see three tabs above the panels: Summary, Alerts and I want to:
  - The summary page shows the list of the accounts, as shown here.
  - The Alerts tab shows any outstanding or upcoming tasks you need to action. We'll talk more about alerts in another webinar.
  - The 'I want to' tab gives a list of tasks available for the customer as a whole (not account specific options).

**CLIENT 10**  
111-111-111  
1 FAKE STREET, FAKETOWN 0616

Welcome, TA Administrator  
You last logged in on Tuesday, Jun 28, 2021 2:02:00 PM  
[Manage my profile](#)  
Intermediary centre

Summary Alerts **I want to...**

What are you looking for?

**My activity**  
> Search submissions View or search your submissions.

**Communicating with IR**  
> Send a message Send us a message through myIR.  
> View messages View your sent and received messages.  
> View letters View or search your IR letters.  
> Upload a document Upload a document using the unique code which IR has provided.

**My details**  
> Manage names and addresses View and change your names, and physical and postal addresses.  
> Manage your BIC code Used to add, update, and cease BIC codes for a customer.

**COVID-19 support**  
> Notify of impact by COVID-19 Notify us that you have been impacted by COVID-19.

**Access management**  
> Redeem a token Confirm a link or gain access to an account (tax type) by entering the code we emailed you.

**Payments, refunds and returns**  
> Request an instalment arrangement Request an arrangement to pay amounts you owe us in instalments.  
> 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.  
> More payment options Set up or make a payment by direct debit or credit card.

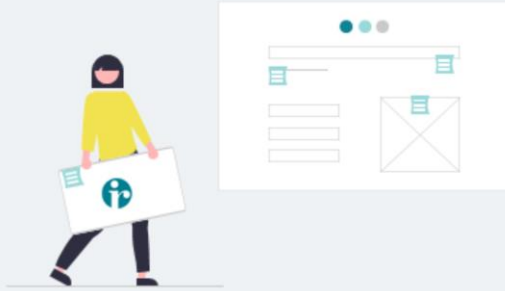
**Registrations, application and enrolment**  
> Application for relief Apply for relief if you cannot meet your payment obligation.  
> Non-active declaration Notify IR that a company is non-active.

- Here's how the 'I want to' page will look for a business client.
- From this tab you, or your client, can do the same things as now - like viewing correspondence, managing payments and returns - but the tasks have been categorised more to make things easier to find.
- The 'I want to' screen for other client types, like individuals, looks the same and includes the tasks relevant to that type of customer.



And speaking of tasks - like now, when you're performing a task, like filing a GST return, you'll see 'breadcrumbs' at the top of the page so you know where you are in the process. They'll just look a bit different.

# Intermediary centre



## TOPICS

---

Finding the Intermediary centre  
What it's used for

Now let's look at the Intermediary centre.

Last viewed:  
**CLIENT 6**

Welcome, TA & BK  
You last logged in on Thursday, Jan 26, 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

- In the top right corner of the screen you'll see a link to the Intermediary centre.
- It's always only a few clicks away, no matter where you are in myIR. Links are available either via the home page or within a customer account.
- The Intermediary centre replaces the current Tax preparer tab.

[Home](#)

**Intermediary centre**  
Ta Courier  
email@email.com

[Intermediary centre](#) Alerts **11**

What are you looking for?

**Communicating with IR**

- > View messages View your sent and received messages.
- > View letters View or search your IR letters.

**My business**

- > Agency reports Access a variety of different client information, activity and agency performance reports.
- > Manage agency Allows you to manage staff access roles and security for your client lists.
- > Update key office holders Add and remove key office holders for a tax preparer.

**My clients**

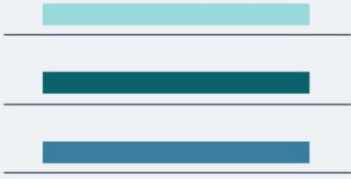
- > Client maintenance Link and delink clients and change where client mail is sent.
- > All client mail Review and save all mail sent to your linked clients, including mail sent to you on their behalf.
- > Manage subscriptions Manage subscriptions to client mail and messages.
- > Client registration Register a client for a new IRD number or tax type.
- > Submit a short-process ruling Submit a short-process ruling request on behalf of a client.
- > Donation tax credits claim Enter client donation tax credits.
- > Apply for Resurgence Support Apply for a Resurgence Support Payment as part of the New Zealand Government's support for businesses affected by the recent increase in New Zealand's COVID-19 alert level.
- > Upload GST returns Upload multiple GST returns.
- > Finance transfers Transfer credits within a client's accounts (tax types) or to another client.
- > Transfer date calculator Work out the maximum amount available and the best effective date to transfer credits between return periods, accounts (tax types) and customers.

**Payroll**

- > Client employee details Upload new and departing employee details.
- > Employer information schedule Upload multiple employment information files (payday reporting).
- > Amend employment information Upload employment information amendments for multiple employers.
- > Employer monthly schedule Upload multiple employer monthly schedules (R34).
- > Amend employer schedules Amend an upload for multiple employer monthly schedule.
- > Single employer Upload a KiwiSaver file to employ multiple employees in KiwiSaver at the same time.
- > Multiple employers Upload a KiwiSaver file to employ multiple employees of multiple employers in KiwiSaver at the same time.

- In the Intermediary centre you'll find a list of things that apply to your role as an intermediary such as communications sent, reports, maintenance on client accounts etc. It's a one-stop shop for you to complete tasks and view notifications on behalf of your clients.
- This example shows what a tax agent will see.
- There are some small changes with ordering and the links have been grouped so that it's easier to navigate. The web request grouping is based on intermediary feedback sessions.
- If you subscribe to clients you can also use the Intermediary centre as a centralised place to receive all related notifications for those customers. You can also view the alerts for those subscribed customers in the Alerts tab. We'll cover alerts and subscriptions in more detail in separate webinars.

## Finding information



### TOPICS

- Filtering
- Searching

Now let's take a quick look at filtering and searching functionality.



Last viewed:  
CLIENT 6

Welcome, TA & BK  
You last logged in on Thursday, Jun 28, 2023 9:49 AM  
[Manage my profile](#)  
[Intermediary centre](#)

Select a customer:

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

3 favourites

[Manage favourites](#)

Filter by Other

CLIENT 6

111-111-111

4 outstanding alerts

CLIENT 10

111-111-111

2 outstanding alerts

CLIENT 18

111-111-111

2 outstanding alerts

Home

Manage favourites

Favourite	Name	ID
★	CLIENT 10	111-111-111
★	CLIENT 18	222-222-222
★	CLIENT 6	333-333-333
☆	Client, 13	444-444-444
☆	Client, 38	555-555-555
★	LARGE ENTERPRISE	666-666-666
☆	TAX AGENT & BOOKKEEPER	777-777-777

Filter by Other

You'll be able to use simple filtering and searching fields to find what you're looking for.

- On some screens there is a filter bar - like the screens for choosing a customer, or managing your favourites.
- Note that this will only filter the things **on that page** (for example, the customer name), it is not a site-wide filter.

[Home](#)

**Intermediary centre**  
Ta Ome  
email@gmail.com

[Intermediary centre](#) Alerts **11**

🔍 What are you looking for?

**Communicating with IR**

- > [View messages](#) View your sent and received messages.
- > [View letters](#) View or search your IR letters.

**My business**

- > [Agency reports](#) Access a variety of different client information, activity and agency performance reports.
- > [Manage agency](#) Allows you to manage staff access roles and security for your client lists.
- > [Update key office holders](#) Add and remove key office holders for a tax preparer.

**My clients**

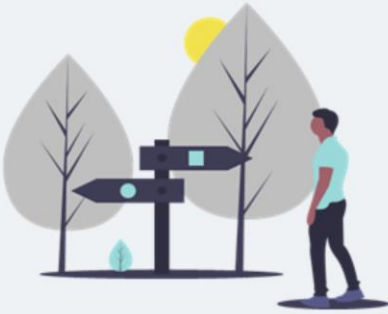
- > [Client maintenance](#) Link and delink clients and change where client mail is sent.
- > [All client mail](#) Review and save all mail sent to your linked clients, including mail sent to you on their behalf.
- > [Manage subscriptions](#) Manage subscriptions to client mail and messages.
- > [Client registration](#) Register a client for a new IRD number or tax type.
- > [Submit a short-process ruling](#) Submit a short-process ruling request on behalf of a client.
- > [Donation tax credits claim](#) Enter client donation tax credits.
- > [Apply for Resurgence Support](#) Apply for a Resurgence Support Payment as part of the New Zealand Government's support for businesses affected by the recent increase in New Zealand's COVID-19 alert level.
- > [Upload GST returns](#) Upload multiple GST returns.
- > [Finance transfers](#) Transfer credits within a client's accounts (tax types) or to another client.
- > [Transfer date calculator](#) Work out the maximum amount available and the best effective date to transfer credits between return periods, accounts (tax types) and customers.

**Payroll**

- > [Client employee details](#) Upload new and departing employee details.
- > [Employer information schedule](#) Upload multiple employment information files (payday reporting).
- > [Amend employment information](#) Upload employment information amendments for multiple employers.
- > [Employer monthly schedule](#) Upload multiple employer monthly schedules (R34).
- > [Amend employer schedules](#) Amend an upload for multiple employer monthly schedule.
- > [Single employer](#) Upload a KiwiSaver file to enrol multiple employees in KiwiSaver at the same time.
- > [Multiple employers](#) Upload a KiwiSaver file to enrol multiple employees of multiple employers in KiwiSaver at the same time.

- On other screens - like the Intermediary centre - you'll be able to **search** for key words (like 'letters' or 'access').

## Thank you



### SEE MORE WEBINARS

[www.ird.govt.nz/bt-webinars](http://www.ird.govt.nz/bt-webinars)

If you have any questions about our webinars you can email us at: [webinar.questions@ird.govt.nz](mailto:webinar.questions@ird.govt.nz)

- This webinar has given an overview of how you will find your way around the new version of myIR. It's just a quick look to help you become familiar with the new environment. We'll cover some of the other new functionality in separate webinars.
- Remember, if you have any questions about this webinar please send them to [webinar.questions@ird.govt.nz](mailto:webinar.questions@ird.govt.nz).
- We appreciate that there will be a period of adjustment as you become familiar with the new layout. You will hear a lot more about what's changing as we get closer to the upgrade in October.