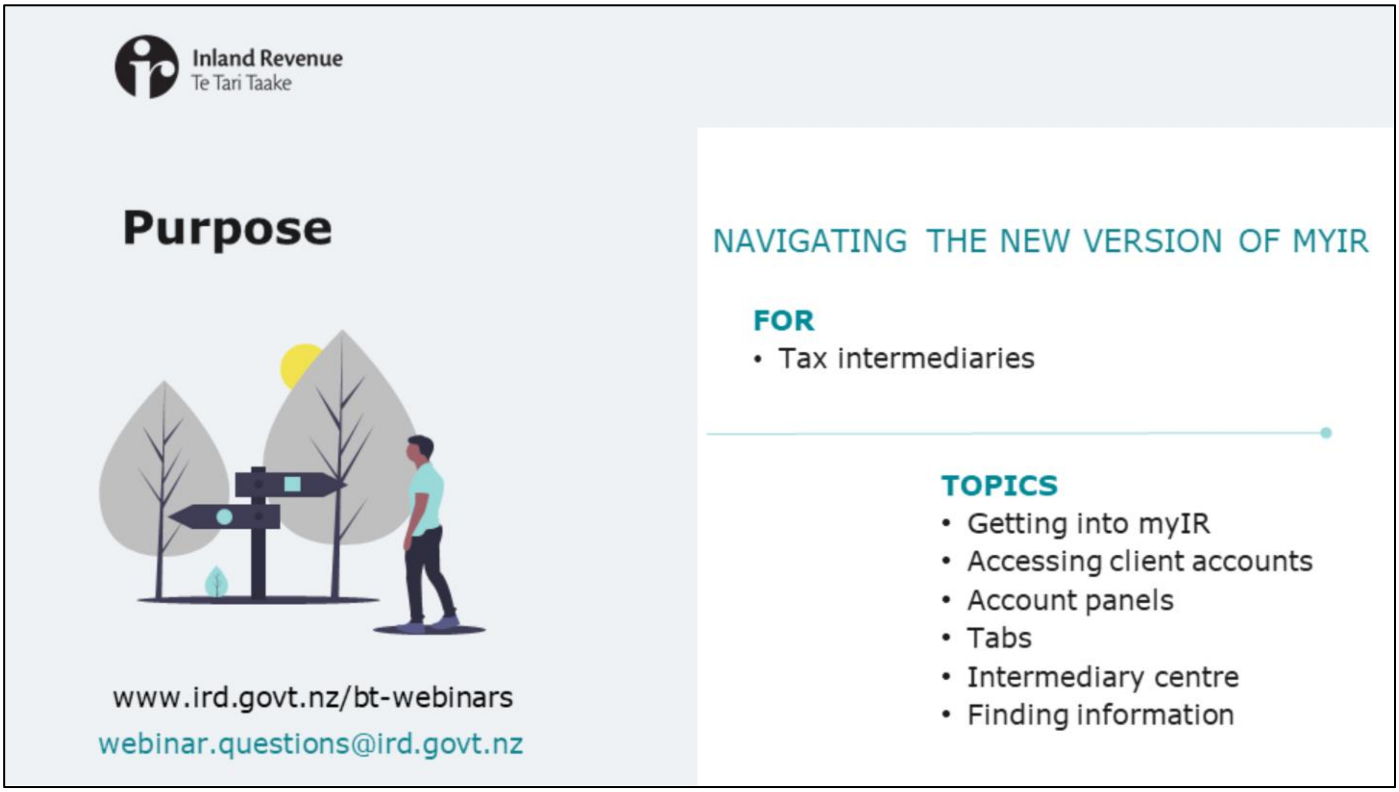
Inland Revenue
Te Tari Taake

Navigating the new version of myIR

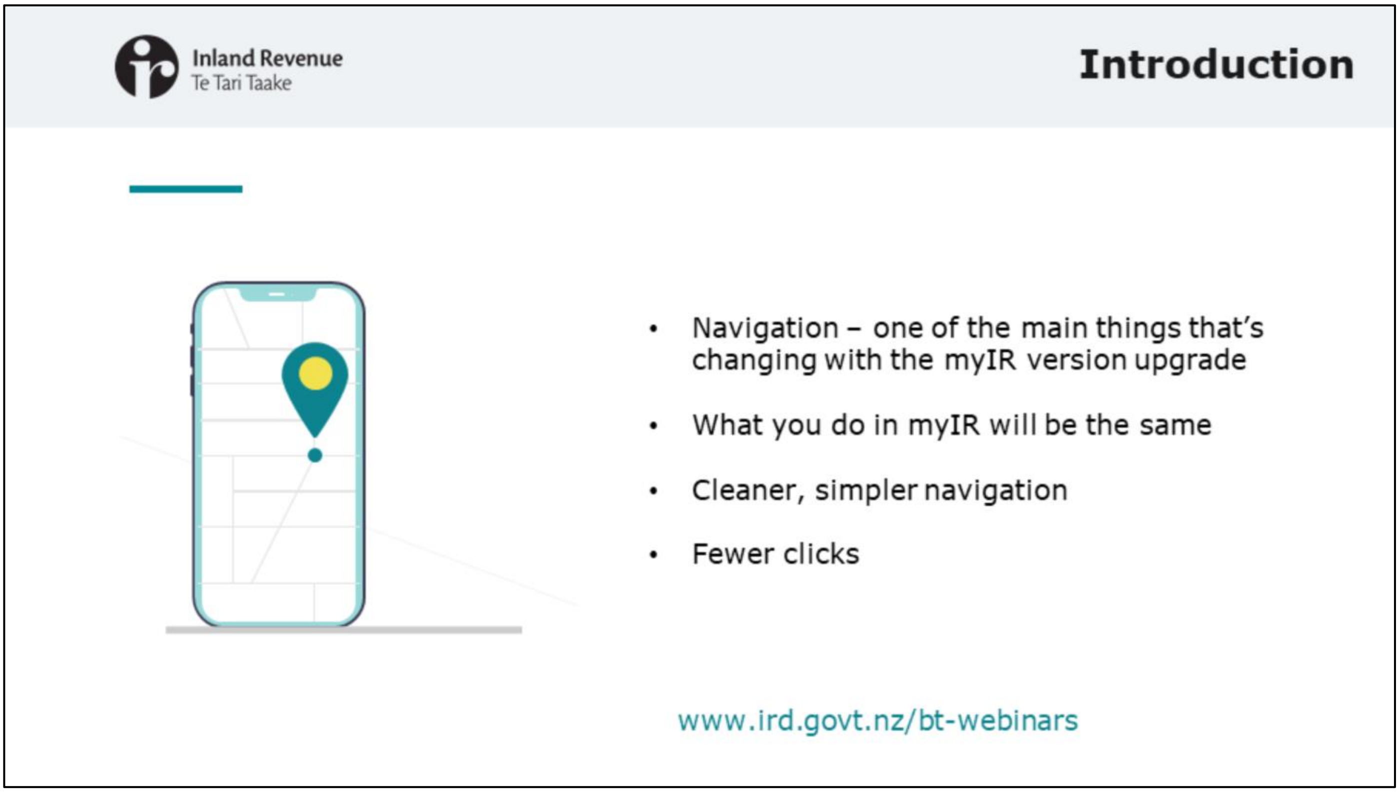
For tax intermediaries

IR Business Transformation

JULY 2021



- 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.
- If you have specific questions about your account, please send them via myIR.



- 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.

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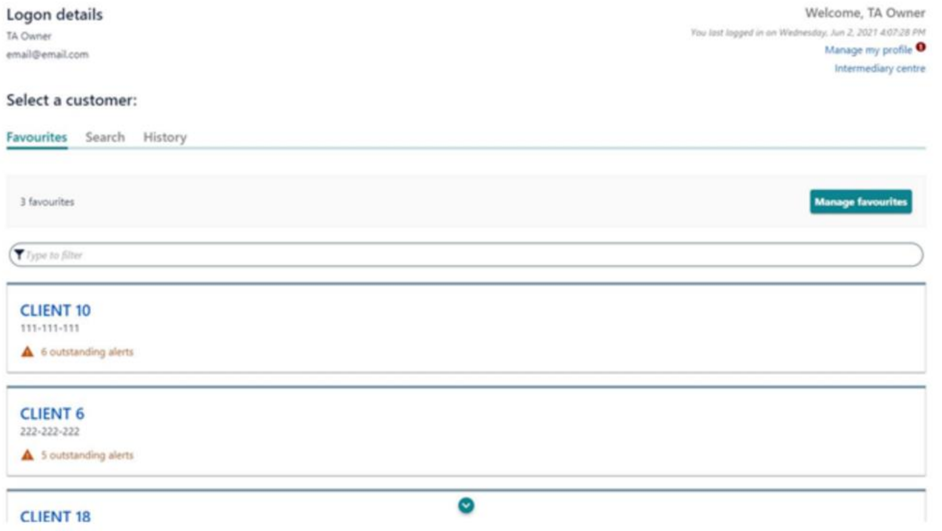
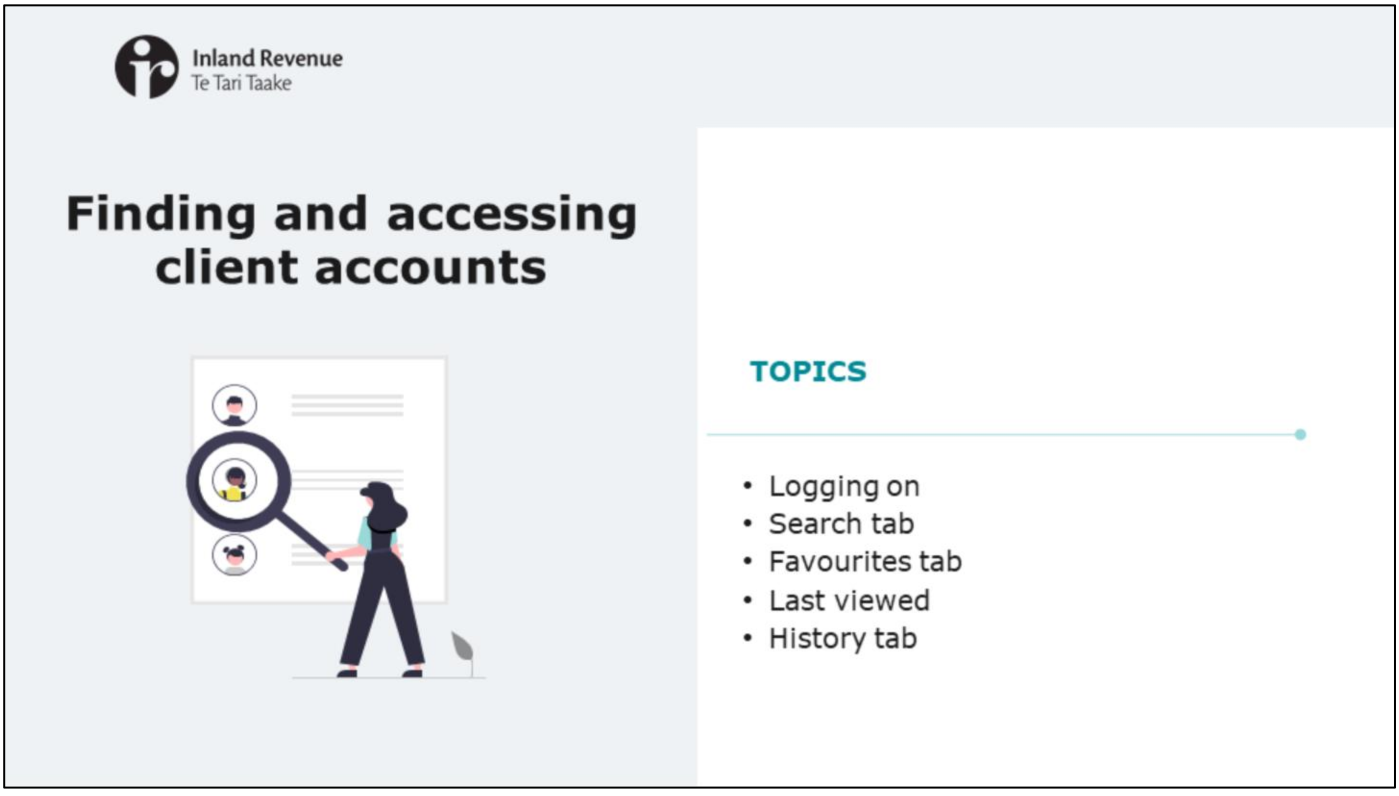
Introduction

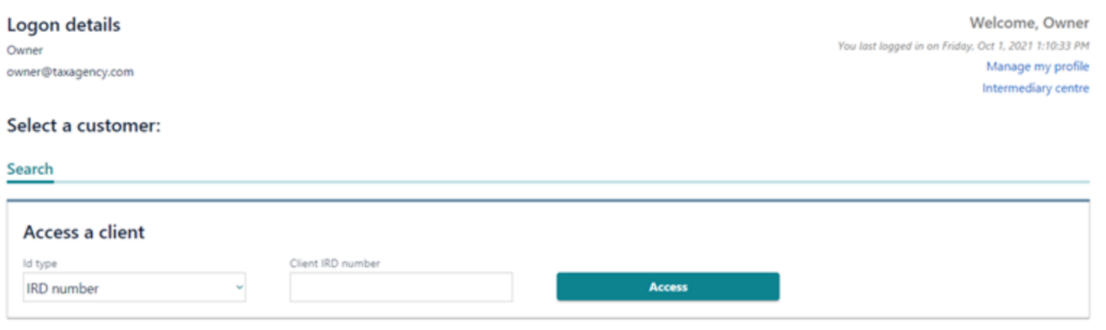


- Here's a reminder of the new look.
- You'll notice there are panels for different account types. You'll hear about these panels a lot as they are a key part of the new design.
- The panels replace the 'tile view' and 'list view' that you currently see and which change depending on how many clients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



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

Finding and accessing client accounts



- 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.

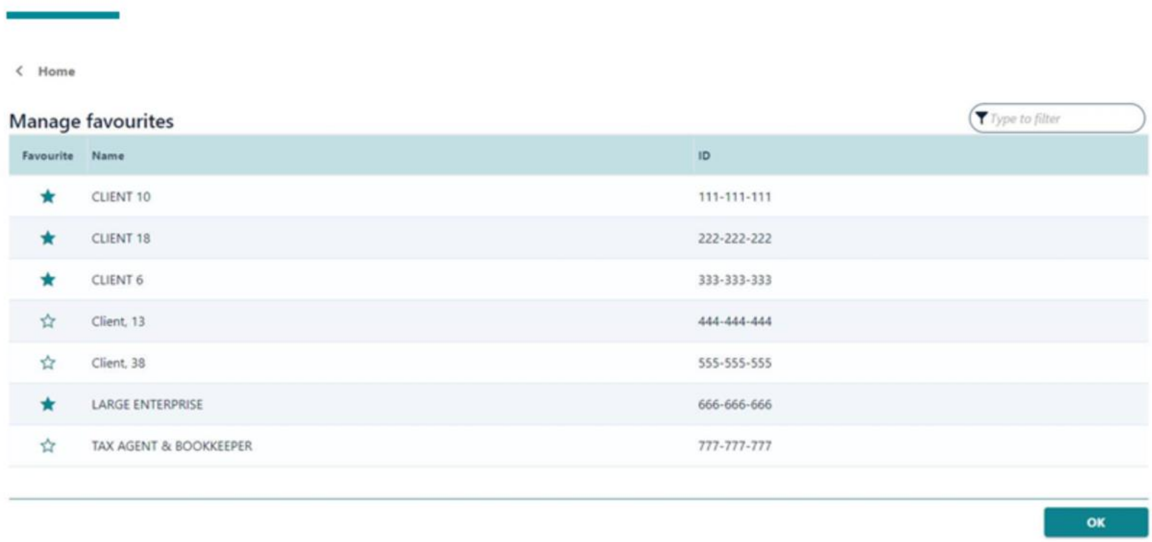
Finding and accessing client accounts

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.

Favourites tab



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.

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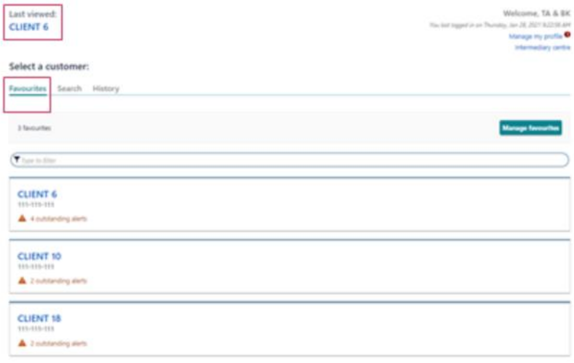
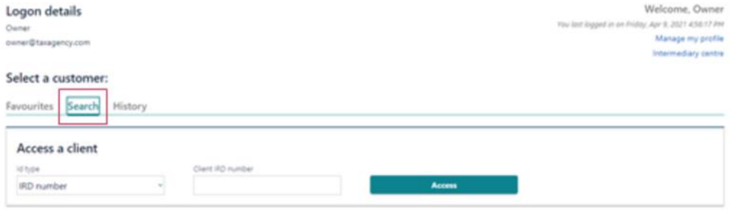
Finding and accessing client accounts





- 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.

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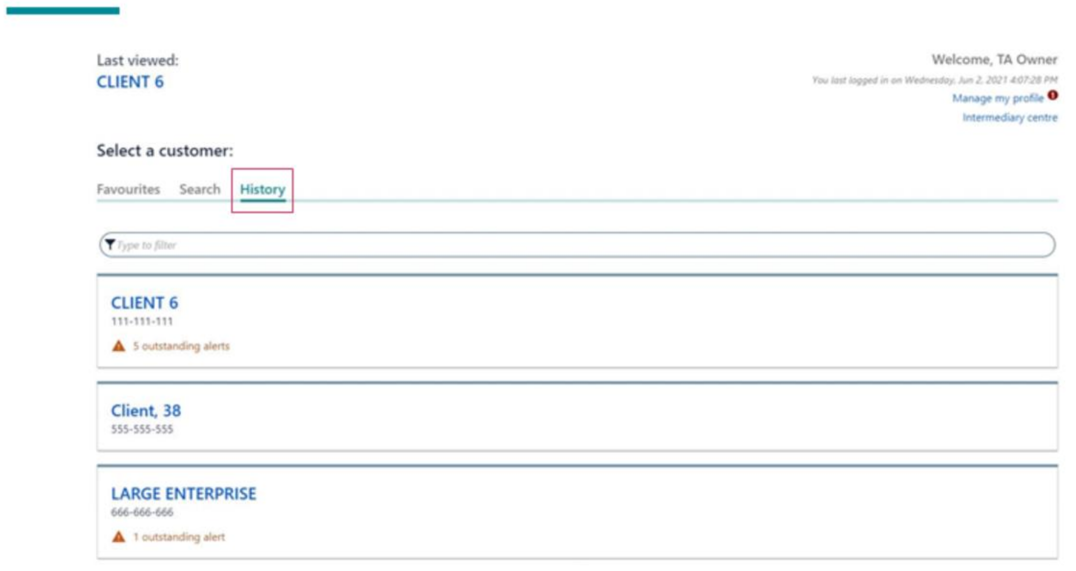
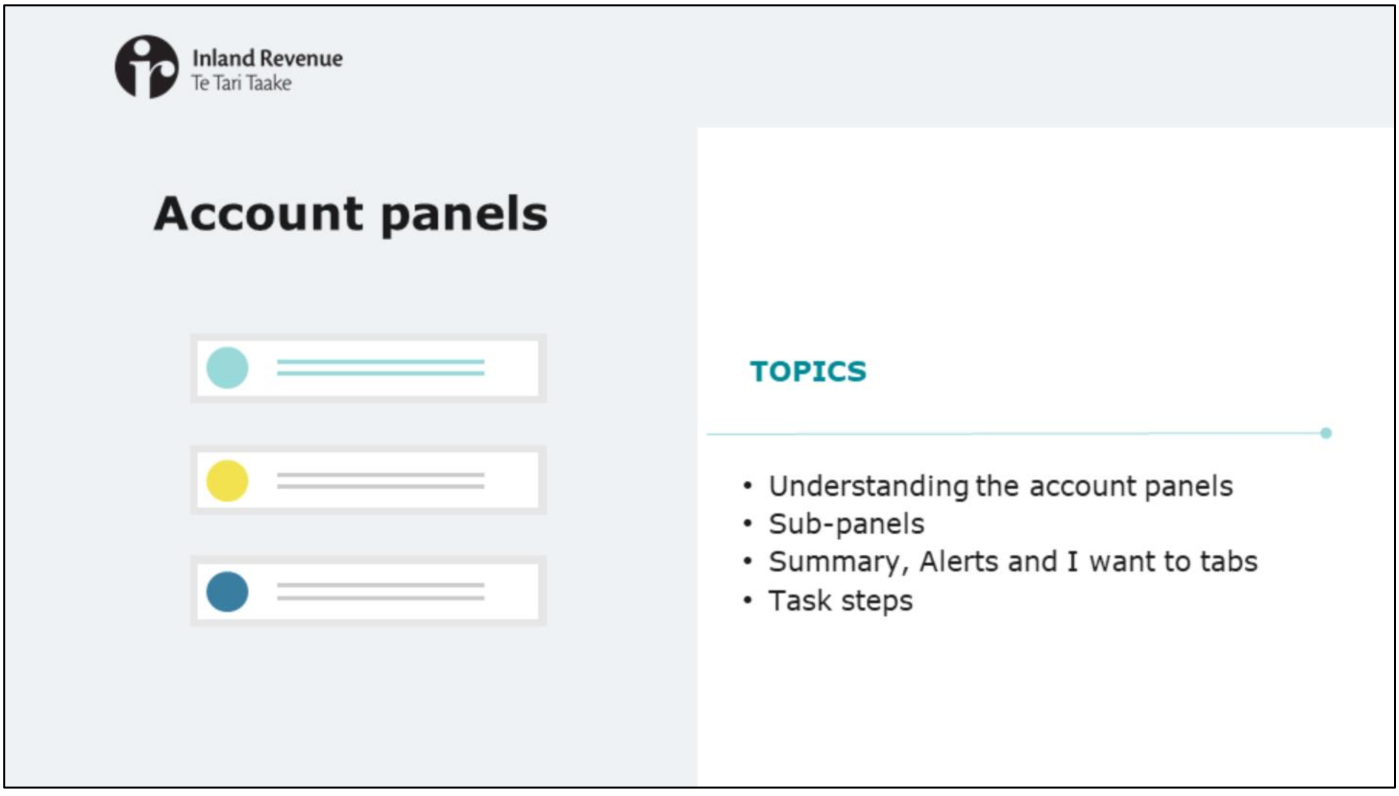
History tab



- 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.



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

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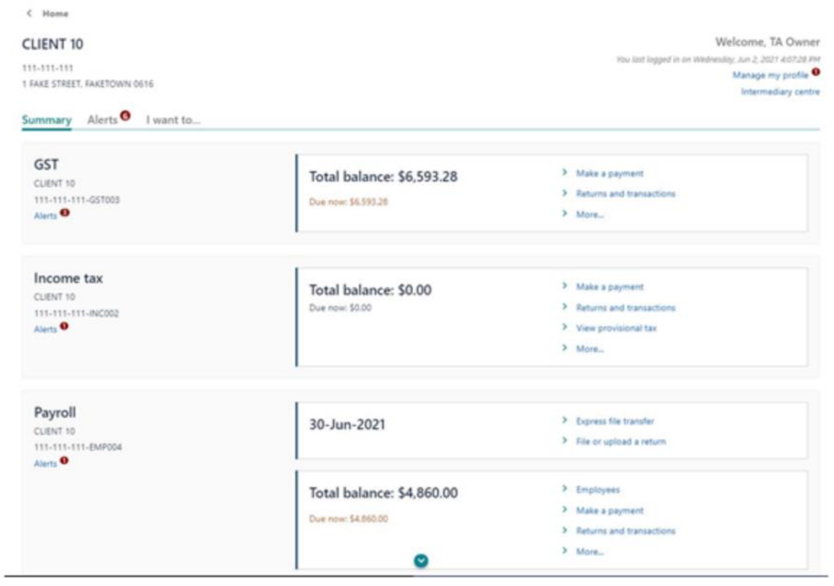
Account panels



- 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.

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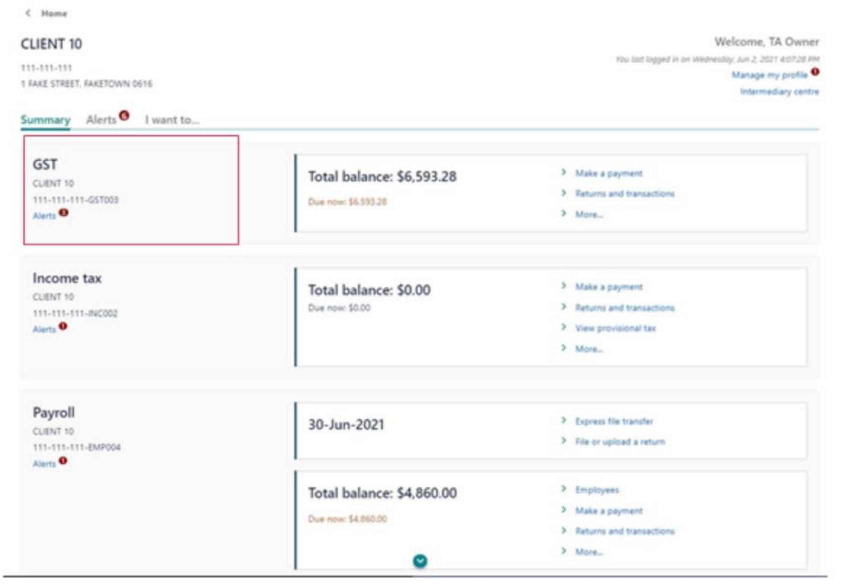
Account panels

Left: Account type, customer information and alerts.



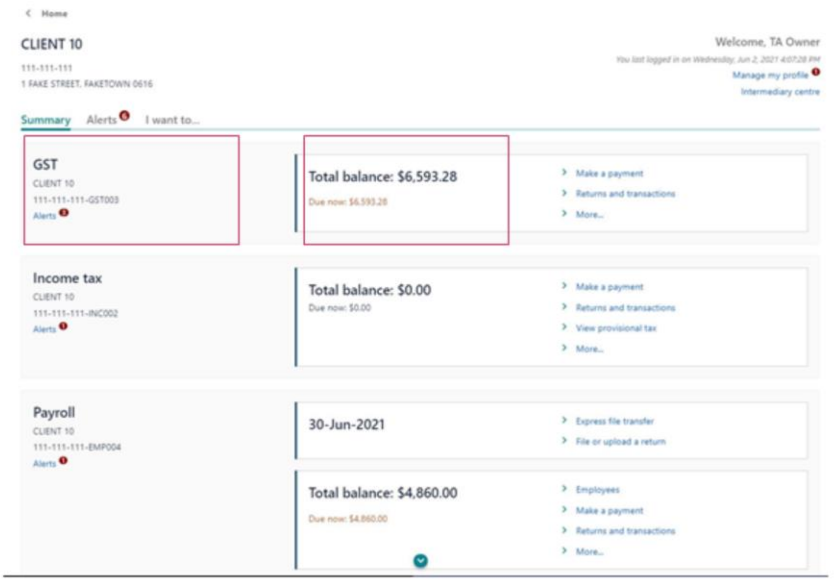
Let’s take a closer look at the account panels.

- 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.

Account panels

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.

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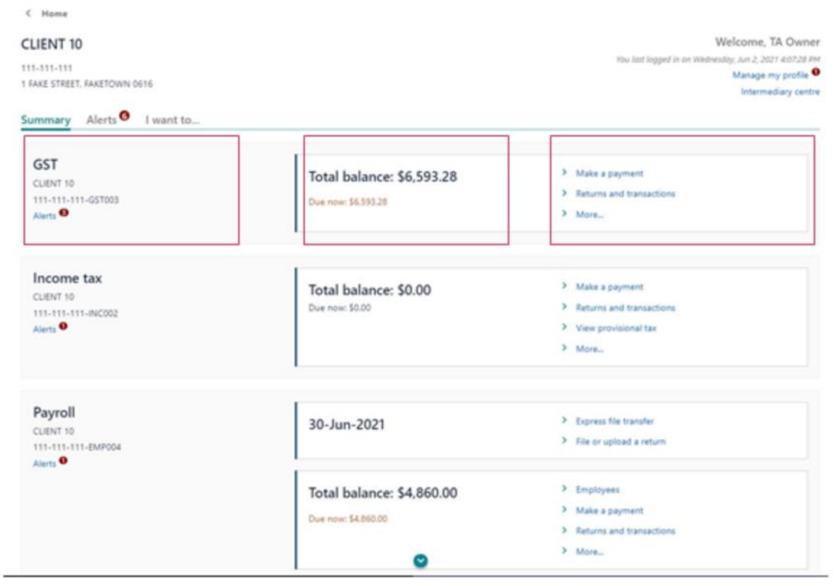
Account panels

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.

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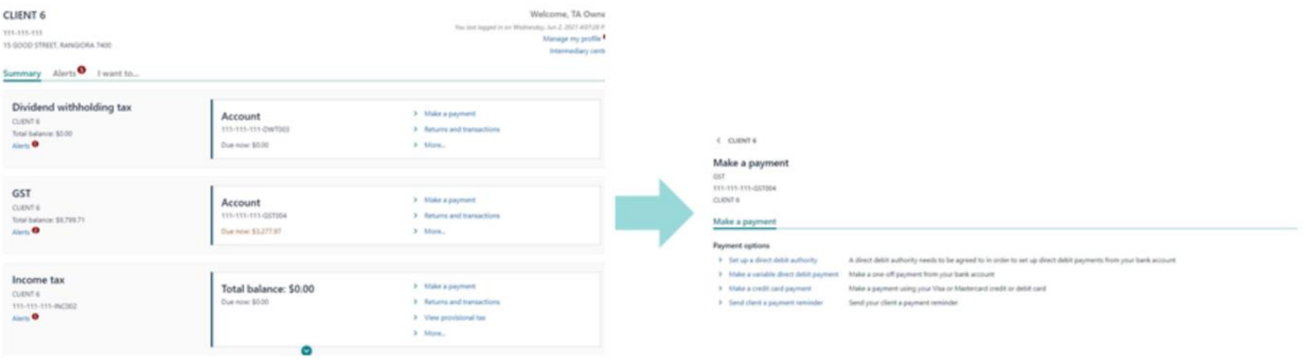
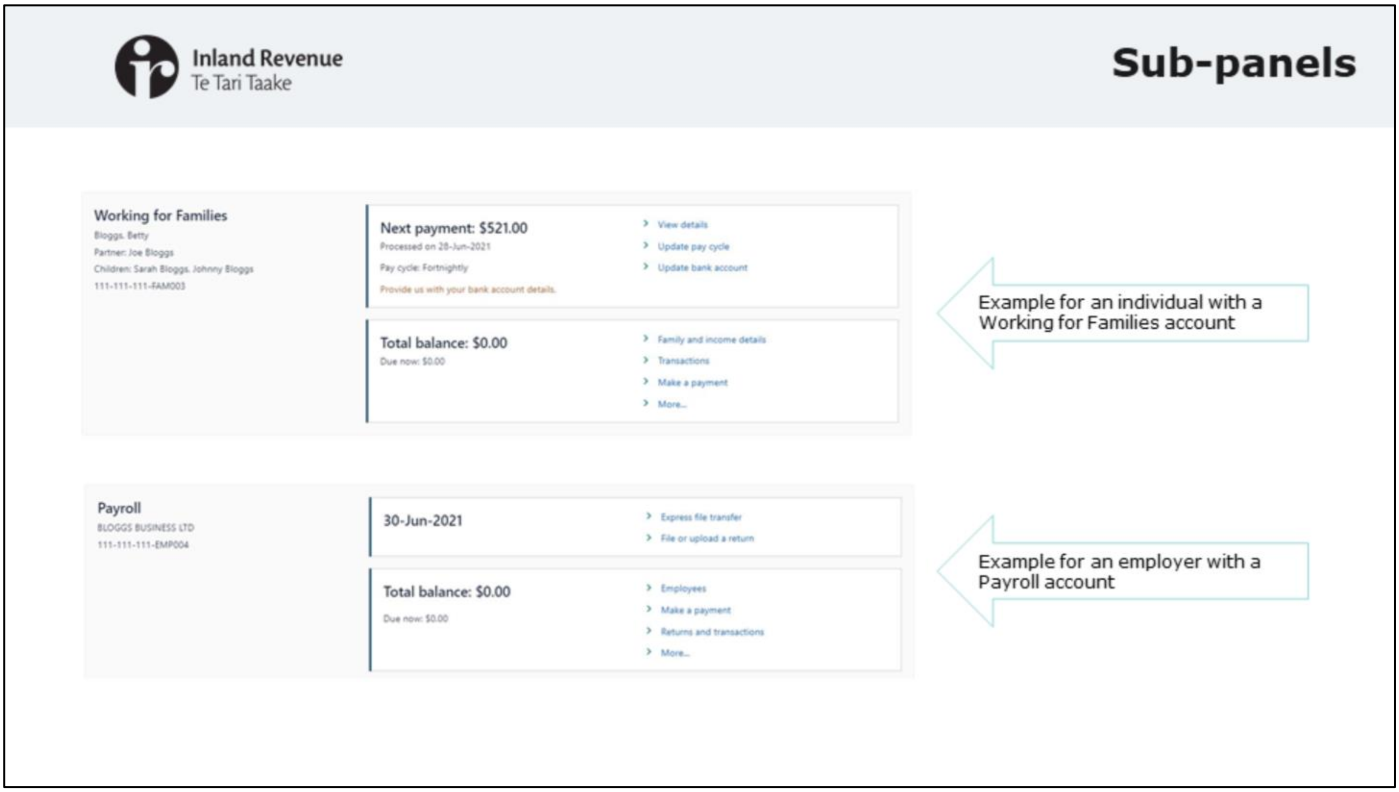
Task links

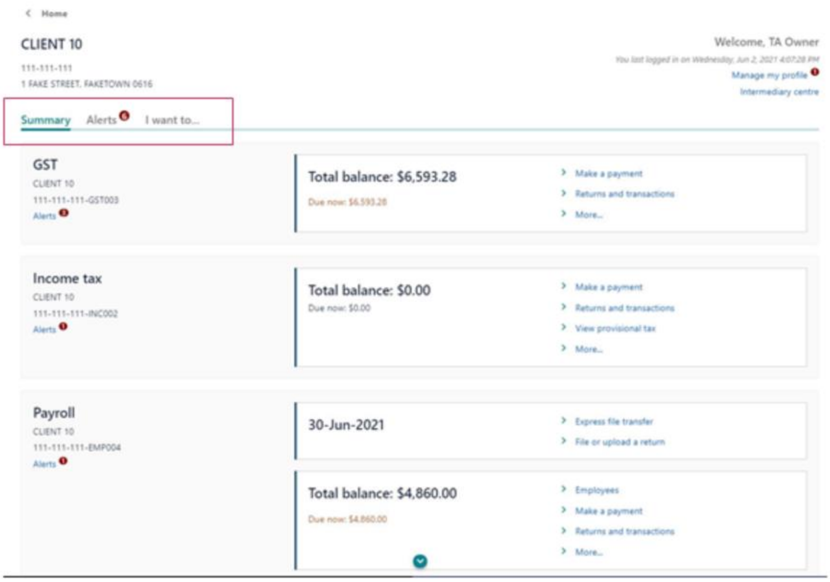


- Here’s an example of what you’ll see if you click into the ‘Make a payment’ link on the GST account panel.



- 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.

Tabs



- 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).

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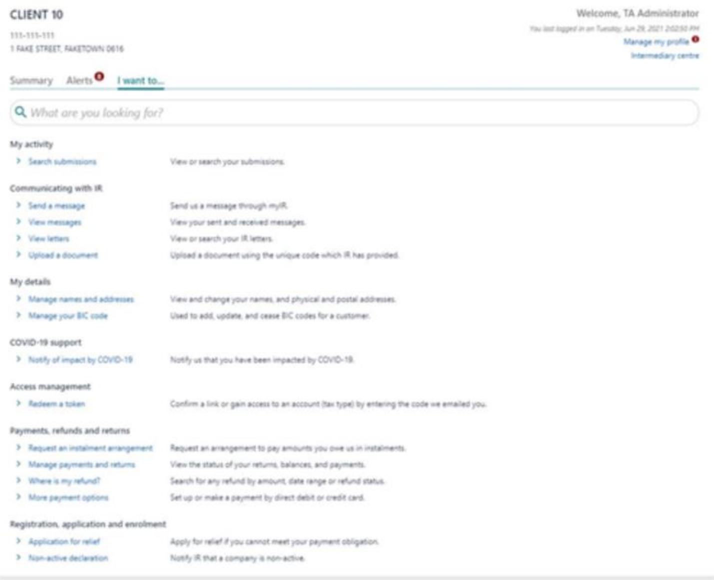
Tabs



- 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.

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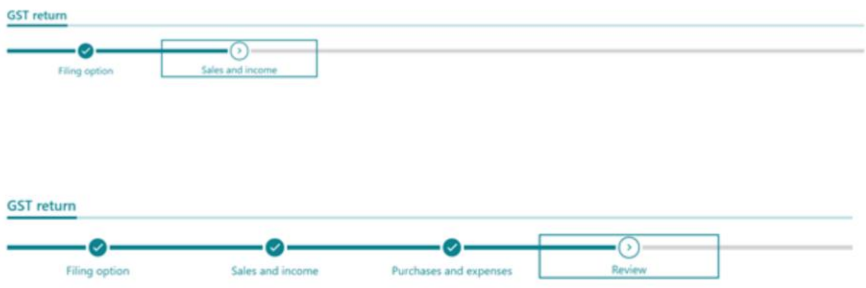
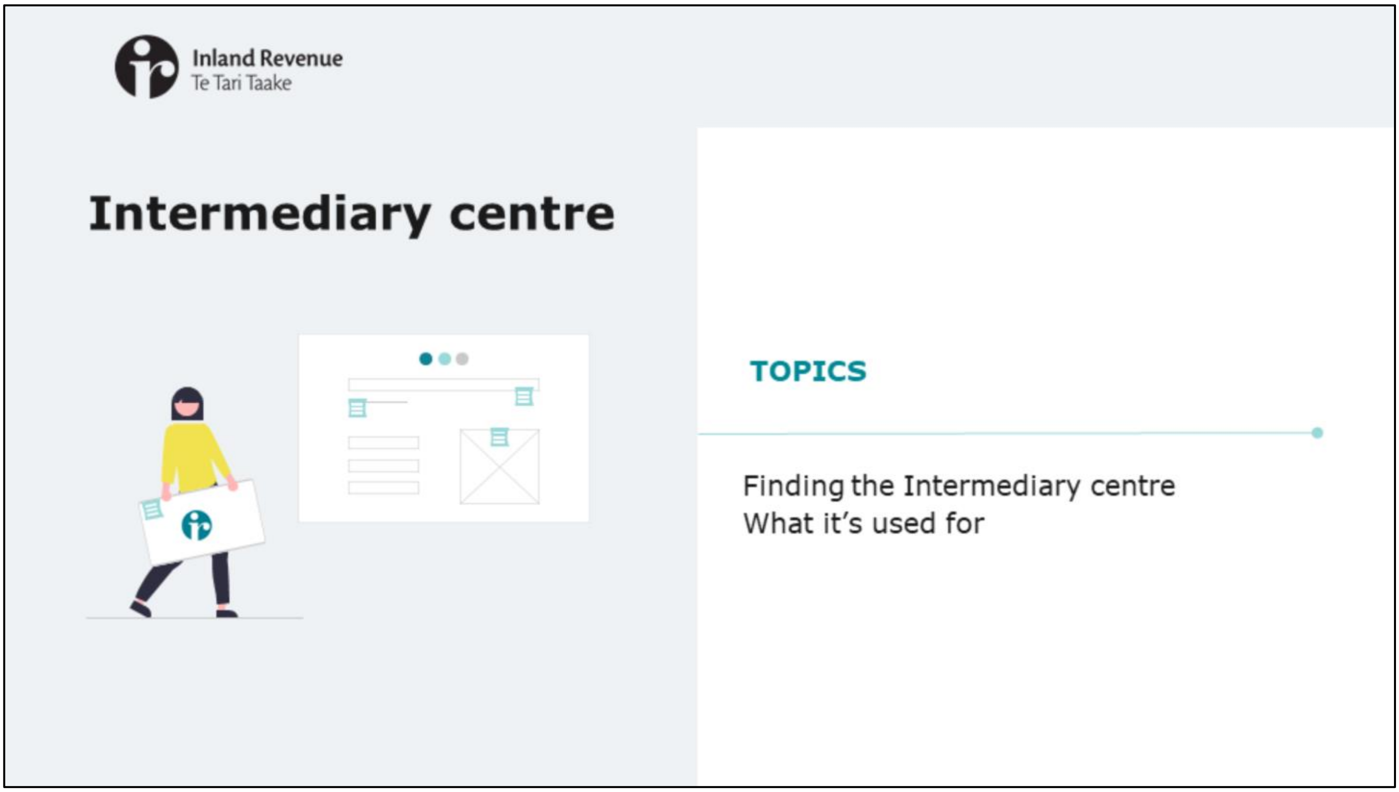
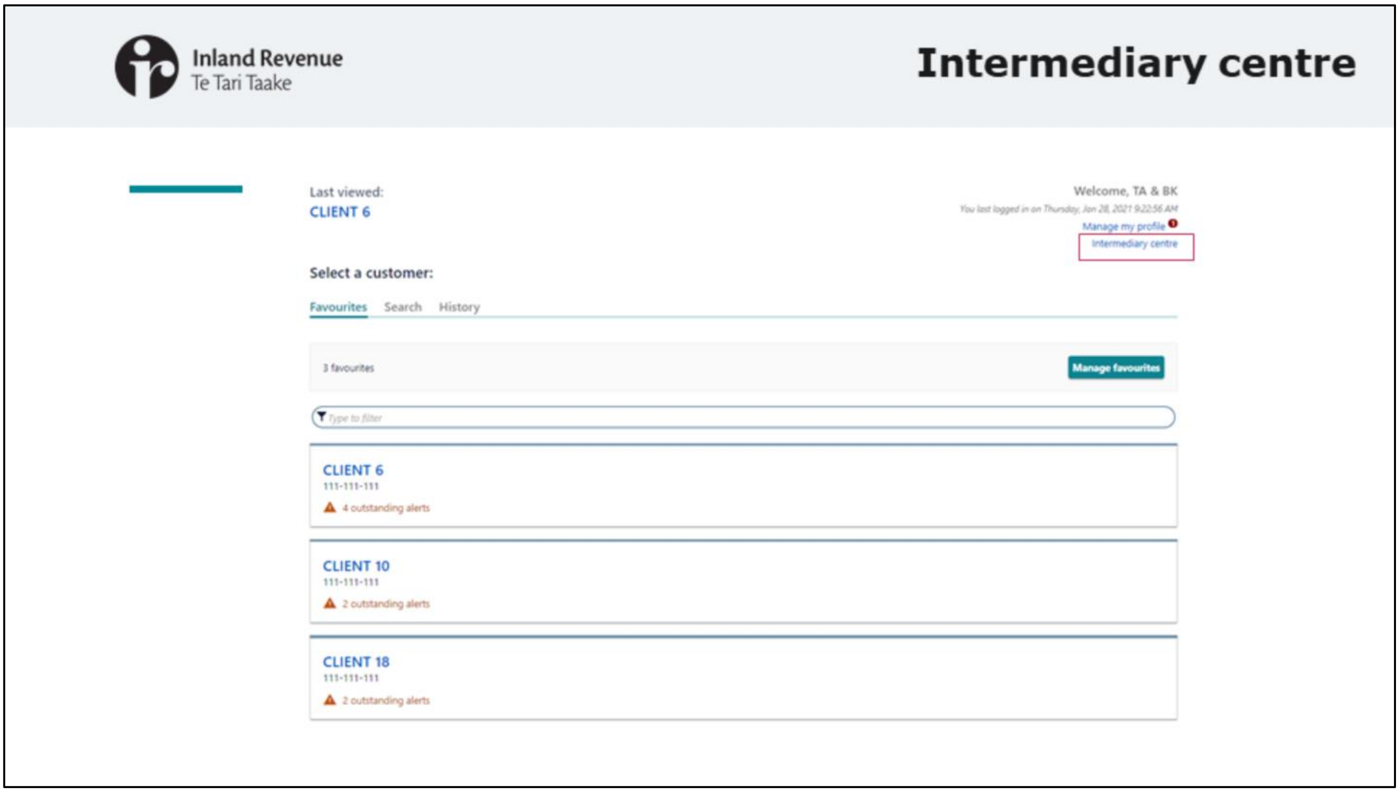
Task steps



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.

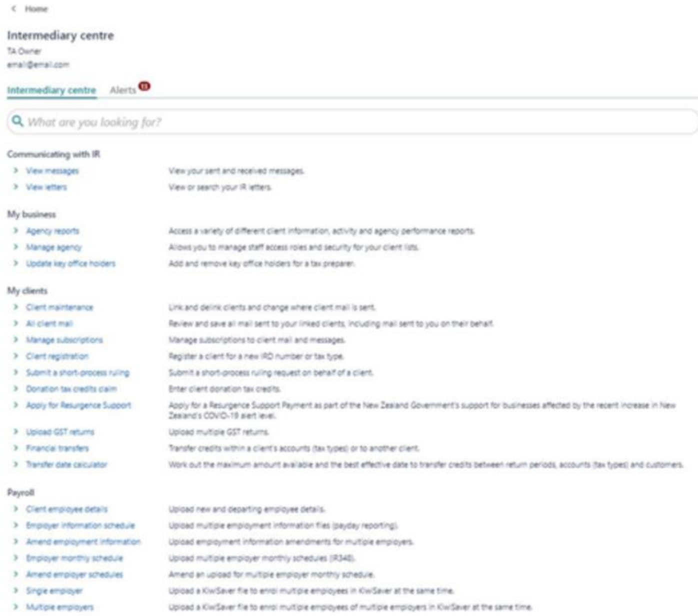


Now let's look at the Intermediary centre.

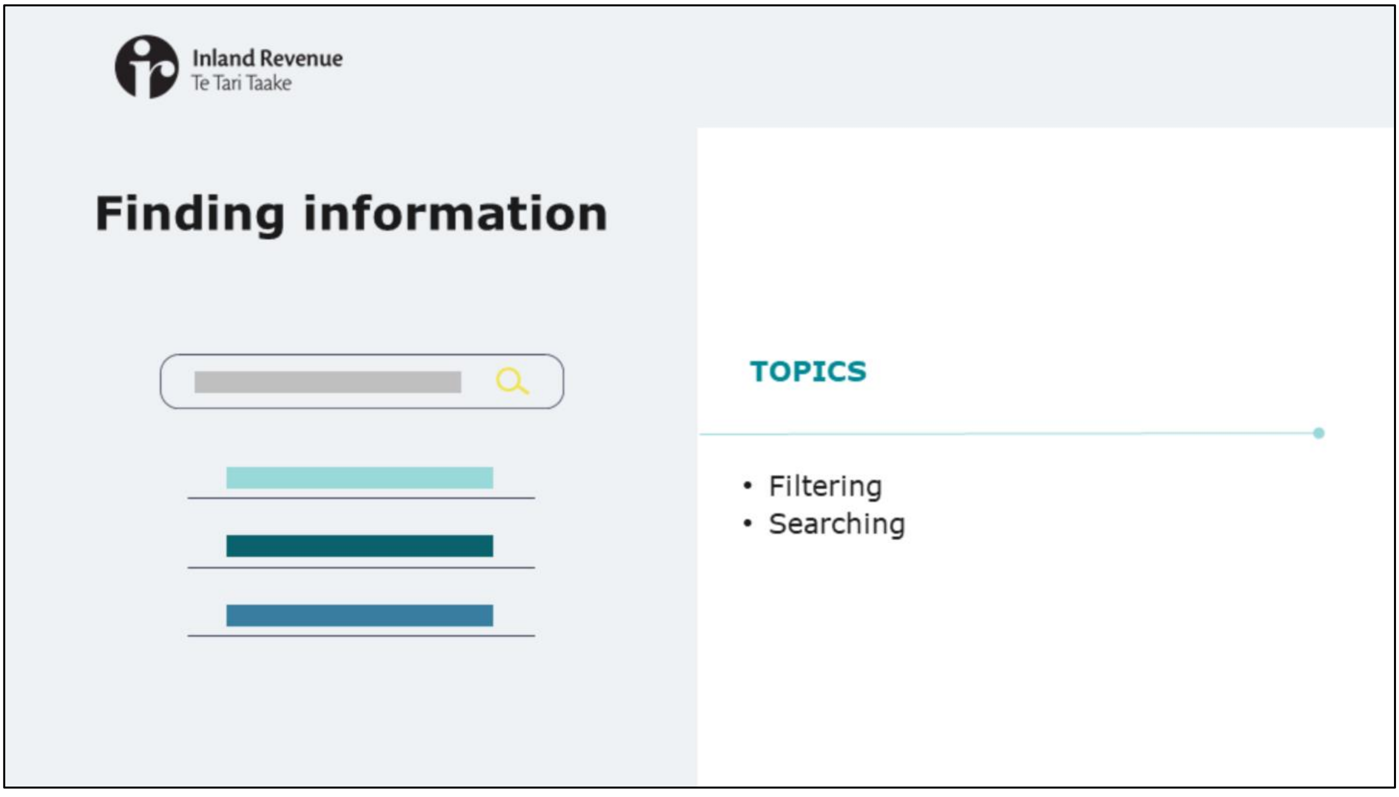


- In the top right corner of the screen you'll see a link to the Intermediary centre.
- It's always only a few clicks away, no matter where you are in myIR. Links are available either via the home page or within a customer account.
- The Intermediary centre replaces the current Tax preparer tab.

Intermediary centre

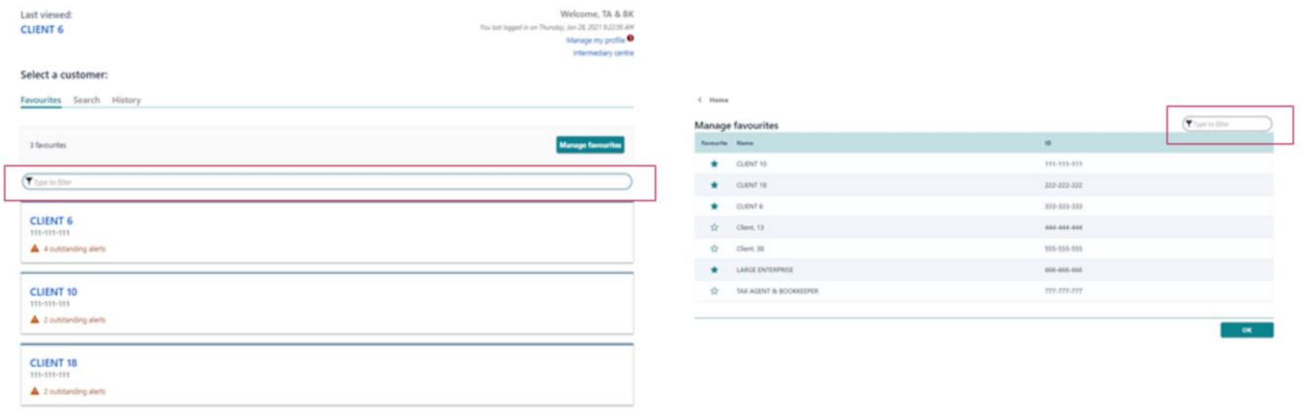


- In the Intermediary centre you'll find a list of things that apply to your role as an intermediary such as communications sent, reports, maintenance on client accounts etc. It's a one-stop shop for you to complete tasks and view notifications on behalf of your clients.
- This example shows what a tax 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.



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

Finding things - filtering



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.

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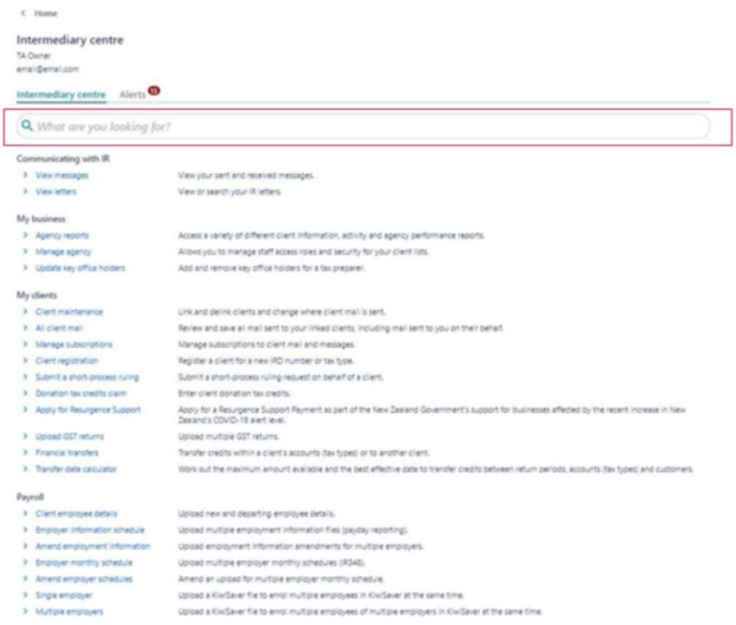
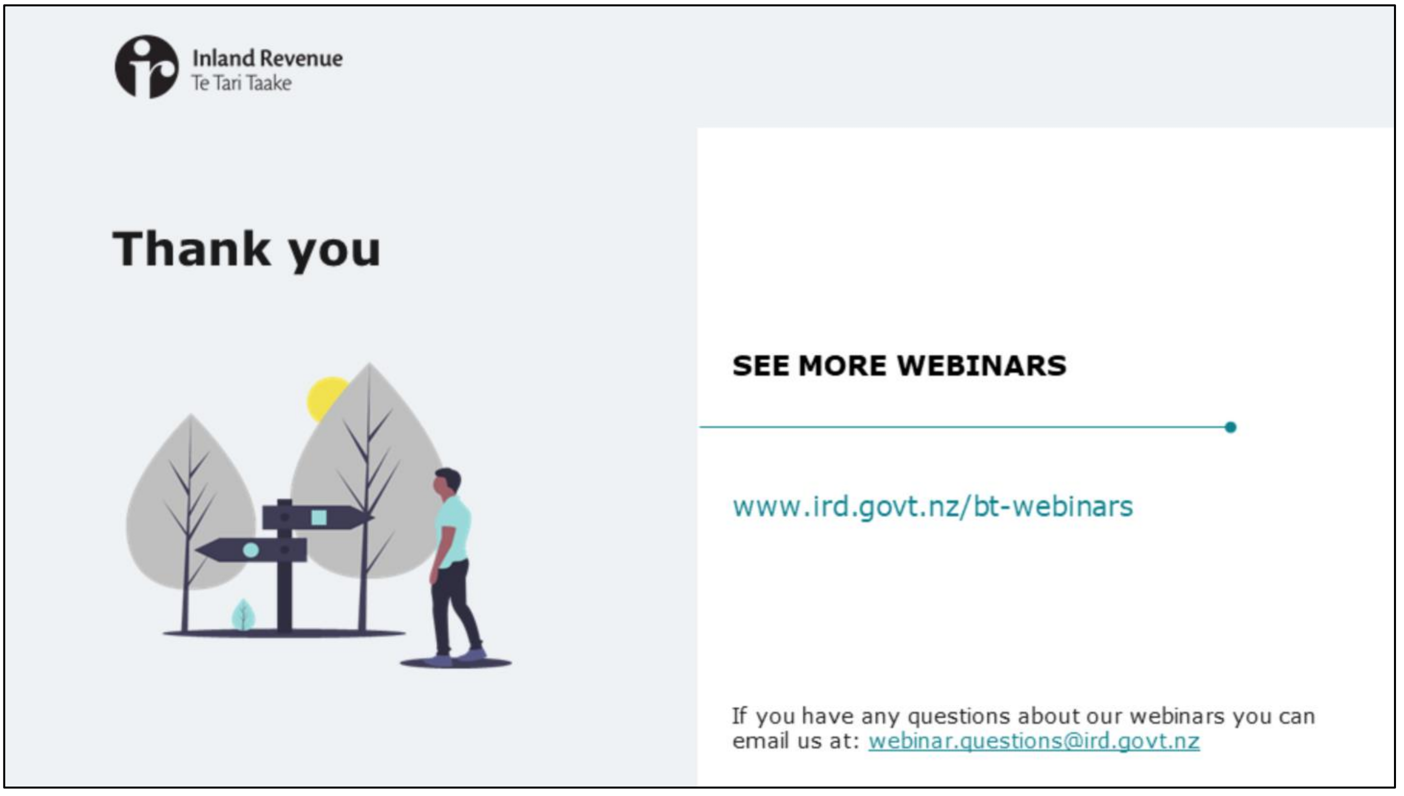
Finding things - searching



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



- 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.
- 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.