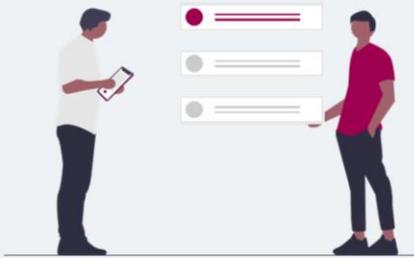

Alerts in the new version of myIR

For individuals and businesses

IR Business Transformation

AUGUST 2021

Purpose



www.ird.govt.nz/bt-webinars
webinar.questions@ird.govt.nz

Information is correct as at 11 August 2021

ALERTS

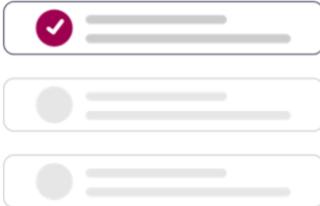
FOR

- Businesses and employers
- Individuals and families

TOPICS

- When alerts appear
- Accessing alerts
- Actioning alerts
- Dismissing alerts
- Restoring dismissed alerts
- Dismissed alert reminders

- In other webinars we've introduced the new version of myIR including some of the key navigation changes.
- In this short presentation we'll focus on alerts. The information is correct as at 11 August 2021.



- In the new version of myIR alerts will be consolidated and easier to find
- They tell you when a task needs to be actioned and include:
 - unread letters and messages
 - payments that are due now or overdue
 - returns that need to be filed
- Each alert has:
 - a description of the alert, and
 - a link that directs you to the task

- In the new version of myIR, alerts have been consolidated to make them easier to find.
- Alerts tell you when a task needs to be actioned. They include things like:
 - unread letters and messages
 - payments that are due now or overdue
 - returns that need to be filed
- Each alert has a description of the alert plus a link that directs you to the task.

BLOGGS BUSINESS LTD

111-111-111

1 FAKE STREET, FAKETOWN 6011

[Summary](#) [Alerts ⁶](#) [I want to...](#)

A red dot shows when there are alerts, and how many

Income tax

Bloggs, Betty

Total balance: \$1,754.00

Total due: \$1,754.00

You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.

[Make a payment](#)

The alert shows details and a link to the task

- You can easily see when there are alerts that need attention (and how many) by the red dot. You'll see these on the screen shots throughout this presentation.
- The alert itself will contain all the details and quick links to take action.

Summary **Alerts** ² I want to...

Type to filter

Income tax

Bloggs, Betty

Total balance: \$1,754.00

Total due: \$1,754.00

You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.

[Make a payment](#)

Income tax return for 31-Mar-2021 was due 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfiled this may mean a late filing penalty

[File Return](#)

The time when the alert appears will depend on the type of action. For example:

- Upcoming return alerts will display as soon as the return has been generated.
- Overdue return alerts will display as soon as the return has passed the due date
- A payment alert will display from the date it is due. Like now, there is no payment reminder prior to the due date.
- The exception to this is that you will receive alerts for provisional tax instalments 30 days before they are due to be paid. Later instalments won't be shown on the alert but there will be a sub-panel on the income tax account where you can see the provisional tax instalment breakdown or estimate provisional tax.
- Payment alerts will only go away once the full payment has been made. So if you partially pay it, the balance on the alert will update to reflect what is to be paid – there won't be a separate alert.

Alerts tab - all alerts

Account panels - alerts for each account (the link will take you to the alerts for that account type)



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

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 8:42:15 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

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

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

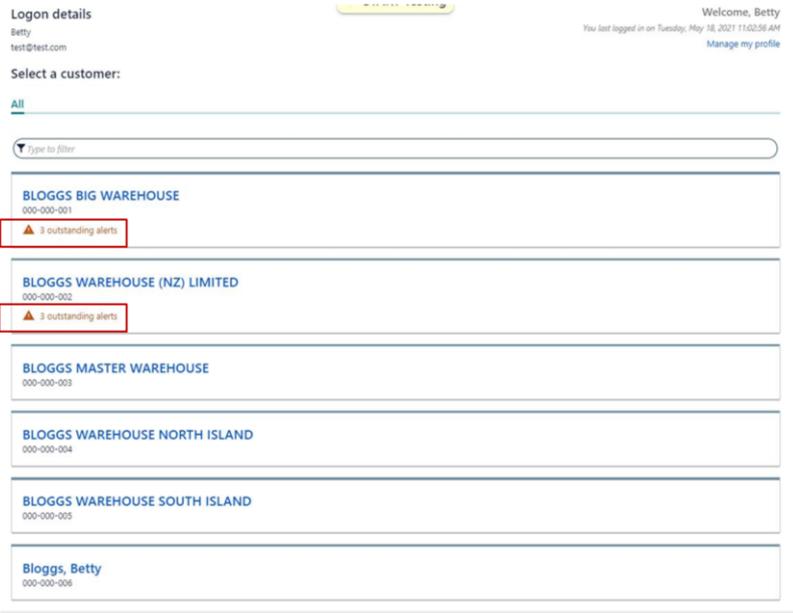
- > Employees
- > Make a payment
- > Returns and transactions
- > More...

You can access alerts through your customer account.

- The Alerts tab is at the top of the account panels.
- From the summary screen you can also see which specific accounts have alerts associated with them – again this is indicated by a red dot that tells you how many alerts are on that account.
- If you prefer, you can go straight to those account specific alerts through the alerts link on the account panel.

If you have access to multiple customers, go into each customer to see their Alerts tab

The panels will tell you which customer accounts have outstanding alerts



The screenshot displays the user interface for accessing alerts. At the top left, the 'Logon details' section shows the user 'Betty' with email 'test@test.com'. A 'Select a customer:' dropdown menu is set to 'All'. Below this is a search bar labeled 'Type to filter'. A list of customer accounts follows, each with a status indicator:

- BLOGGS BIG WAREHOUSE** (000-000-001): 3 outstanding alerts (indicated by a red triangle icon and a red box around the text).
- BLOGGS WAREHOUSE (NZ) LIMITED** (000-000-002): 3 outstanding alerts (indicated by a red triangle icon and a red box around the text).
- BLOGGS MASTER WAREHOUSE** (000-000-003): No alerts.
- BLOGGS WAREHOUSE NORTH ISLAND** (000-000-004): No alerts.
- BLOGGS WAREHOUSE SOUTH ISLAND** (000-000-005): No alerts.
- Bloggs, Betty** (000-000-006): No alerts.

At the top right, the user is welcomed as 'Betty', with a note 'You last logged in on Tuesday, May 18, 2021 11:02:56 AM' and a 'Manage my profile' link.

If you have access to multiple customers, you'll need to go into each customer to see their Alerts tab. The panels on the landing page will show you which customer accounts have outstanding alerts.

Use the free text filter bar to search your alerts



Summary **Alerts** ² I want to...

Income tax Bloggs, Betty Total balance: \$1,754.00	Total due: \$1,754.00 You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding. Make a payment
	Income tax return for 31-Mar-2021 was due 07-Jul-2021 Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfiled this may mean a late filing penalty File Return

- You can use the free text filter to search your alerts.
- Alerts are grouped by account. For example, this screen shot shows that the customer has two income tax alerts:
 - One for making a payment
 - Another for filing a return

Bloggs, Betty

000-000-001
1 FAKE STREET, FAKETOWN 6011

Welcome, Betty Bloggs

You last logged in on Tuesday, May 4, 2021 10:50:13 AM
[Manage my profile](#)

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

Type to filter

GST

Bloggs, Betty
000-000-001-GST005

Your 31-May-2021 return was due on 28-Jun-2021

Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfiled this may mean a late filing penalty.

[File your return](#)

Income tax

Bloggs, Betty
000-000-001-INC002

You have a payment due now

You have \$1,754.00 due for payment now. Make a payment now to stop any penalties and interest.

[Make a payment](#)

Your 31-Mar-2021 return was due on 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfiled this may mean a late filing penalty.

[File your return](#)

Description
and link to
action



- The description in the alert tells you about the task that needs to be actioned. It provides details like the amount due or the filing period.
- You can go directly to the task from the alert. Just click on the blue link.
- In the example shown here, the 'File return' alert link will take you to the return for that period. The 'Make a payment' link will take you to your payment options. The alerts tab provides easy navigation - to see what needs to be done and then take action.

Bloggs, Betty

139-468-201
1 FAKE STREET, FAKETOWN 6011

Welcome, Betty Bloggs

You last logged in on Monday, May 31, 2021 2:58:13 PM
[Manage my profile](#)

Summary **Alerts** ⁵ I want to...

Type to filter

Dismiss an alert



Income tax

Bloggs, Betty
Total balance: \$1,754.00

Total due: \$1,754.00

You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.

[Make a payment](#)



Income tax return for 31-Mar-2021 was due 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfiled this may mean a late filing penalty

[File Return](#)



- If you don't want to see a particular alert, you can dismiss it so it doesn't sit on your alerts page and isn't counted in the red dot.
- You dismiss an alert by clicking on the cross at the right of the panel.
- If you dismiss an alert, it will be dismissed for your logon only. Other people - like your tax intermediary or other people in your organisation - with access to the account will still see the alert.

Bloggs, Betty

000-000-001
1 FAKE STREET, FAKETOWN 6011

Welcome, Betty Bloggs

You last logged in on Tuesday, May 4, 2021 10:50:13 AM
[Manage my profile](#)

Summary **Alerts** ² I want to...

Type to filter

Income tax

Bloggs, Betty
000-000-001-INC002

You have a payment due now

You have \$1,754.00 due for payment now. Make a payment now to stop any penalties and interest.
[Make a payment](#)

Your 31-Mar-2021 return was due on 07-Jul-2021

Your 31-Mar-2021 return was due on 07-Jul-2021. If your return stays unfiled this may mean a late filing penalty.
[File your return](#)

[View dismissed alerts](#)

View dismissed alerts

- You can view dismissed alerts at any time by clicking on the 'view dismissed alerts' link at the bottom of the alerts tab.

< Bloggs, Betty

Dismissed alerts

Bloggs, Betty
000-000-001

Type to filter

GST

Bloggs, Betty
000-000-001-GST005

Your 31-May-2021 return was due on 28-Jun-2021

Your 31-May-2021 return was due on 28-Jun-2021. If your return stays unfiled this may mean a late filing penalty.

[File your return](#)



Restore dismissed alerts



- And if you change your mind you can restore your dismissed alerts.

- Alerts are evaluated on a daily basis
- When the due date is near, due, or is overdue, the alert will appear every time you log in – even if you keep dismissing it.

Example: income tax return for 31 March 2022



1 April 2022

Alert displays



7 July 2022

Due date (if no extension of time)



From 1 April 2022

Alert dismissed



28 June 2022

Alert comes back as a reminder

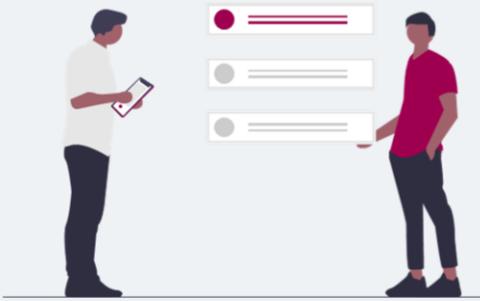


After 7 July 2022

Once it is overdue, the alert will show every time you log in, even if you have dismissed it

- Don't worry, there's no risk that you'll forget to do something because you've dismissed the alert. Alerts are evaluated on a daily basis. When the due date is getting close, is due, or is overdue, the alert will appear every time you log in – even if you keep dismissing it.
- So for example:
 - a payment alert will display from the date it is due. If it is dismissed, the reminder will appear each day you log on until it is fully paid.
 - if you dismiss an alert for filing, it will appear again 10 days before the due date. If you continue to dismiss it, the alert will reappear each day when you log on until you've filed.
- Here we show an example of how this will look – using the example of an income tax return for 31 March 2022.
 - The alert will show from 1 April 2022 when the return is generated.
 - If you don't have an extension of time, it is due on **7 July 2022**.
 - You can dismiss the alert anytime from when it appears on 1 April 2022.
 - The alert will then come back on **28 June 2022** as a reminder.
 - Once 7 July 2022 passes and it is overdue, the alert will show every time you log in, even if you have dismissed it.

Thank you



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

- This webinar has given an overview of how you will find and action alerts when we upgrade to the new version of myIR.
- Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.