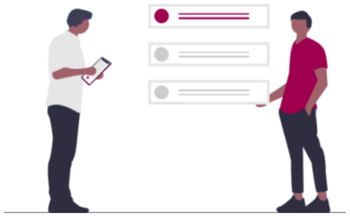
# SUMMARY:
# Alerts in the new version of myIR

For: tax intermediaries



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

It is aimed at tax intermediaries

ird.govt.nz/bt-webinars

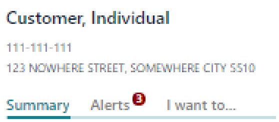
### Introduction

Alerts tell you when a task needs to be actioned

Alerts will be consolidated and easier to find

Each alert has:

- a description of the alert, and
- a link that directs you to the task




A red dot tells you when there are alerts, and how many

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.

## You'll access alerts in four different places

### Client alerts

All the alerts for the clients you're subscribed to are consolidated in the Alerts tab in the Intermediary centre. They are available for those who:

- are subscribed to the client and have 'tax preparer' access
- are nominated persons
- have token access

You cannot subscribe or unsubscribe to alerts for clients you are a nominated person for or currently have token access to. Like today, you will get their alerts here by default if your logon has access.

### Customer account alerts

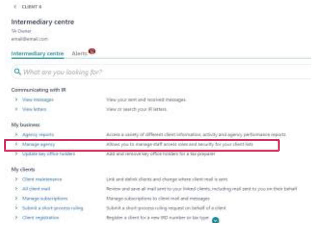
If you haven't subscribed to a client, you can see and action their alerts through their customer account.

Alerts tab - all alerts for this customer

Account panels - alerts for each account


### Agency alerts

Your agency alerts are under the 'Manage agency' link in the Intermediary centre. E.g. those for filing your own GST and payroll as well as any mail alerts for accounts you have access to.




Manage agency link available to:

- owners
- administrators
- restricted administrators

### Your own logon alerts

These are under the 'Manage my profile' link just above the link to the Intermediary centre. These are alerts for your logon's secure mail messages.

Inland Revenue
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# SUMMARY:

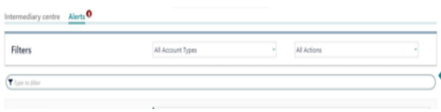
# Navigating the new version of myIR

For: tax intermediaries

## Finding specific alerts

In an alerts tab you can filter or search for an alert:

Filter by account or action

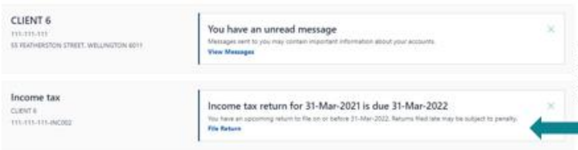



Or use the free text filter bar

## Actioning alerts

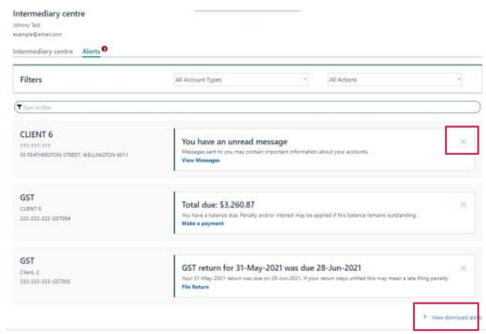
The description in the alert tells you about the task that needs to be actioned. It provides details like the amount due or the filing period.

You can go directly to the task from the alert. Just click on the blue link.




Description and link to action

## Dismissing alerts




You can dismiss alerts if you don't want to see them right now.

You can view dismissed alerts.


From the View dismissed alerts screen you can restore them.

## 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

## Dismissed alert reminders

Don't worry, you won't forget to do something when you've dismissed the alert. 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 for income tax return for 31 March 2022**

| 1 April 2022 | 31 March 2023 | between 1 April 2022 and 31 March 2023 | 21 March 2023 | After 31 March 2023 |
|---|---|---|---|---|
| Alert displays | Due date for clients of a tax agent with an extension of time | Alert dismissed | Alert comes back as a reminder | Once it is overdue, the alert will show every time you log in, even if you have dismissed it |