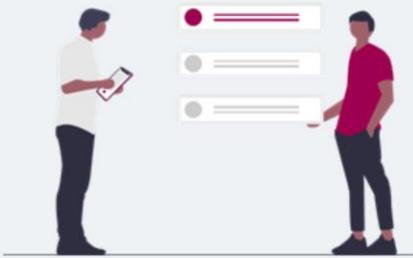

Alerts in the new version of myIR

For tax intermediaries

IR Business Transformation

11 AUGUST 2021

Purpose



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

Information is correct as at 11 August 2021

ALERTS

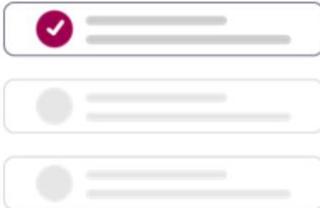
FOR

- Tax intermediaries

TOPICS

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

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



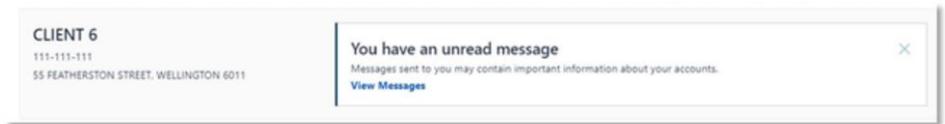
- In the new version of myIR alerts will be consolidated and easier to find
- They tell you when a task needs to be actioned and include:
 - unread letters and messages
 - payments that are due now or overdue
 - returns that need to be filed
- Each alert has:
 - a description of the alert, and
 - a link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

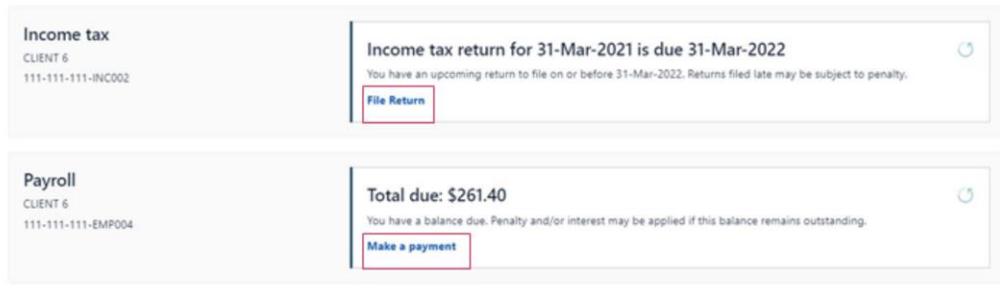
A red dot shows when there are alerts, and how many



The alert shows a description 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 a description of the alert and quick links to take action – we'll look at this in more detail shortly.

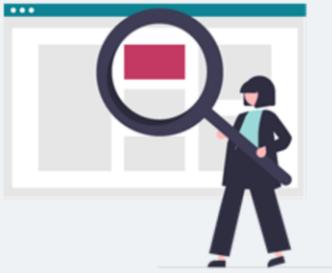


The screenshot displays two alert cards. The first card is for 'Income tax' (CLIENT 6, 111-111-111-INC002) and states 'Income tax return for 31-Mar-2021 is due 31-Mar-2022'. It includes a sub-message: 'You have an upcoming return to file on or before 31-Mar-2022. Returns filed late may be subject to penalty.' and a 'File Return' button. The second card is for 'Payroll' (CLIENT 6, 111-111-111-EMP004) and states 'Total due: \$261.40'. It includes a sub-message: 'You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.' and a 'Make a payment' button. Both cards have a refresh icon in the top right corner.

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 still to be paid – there won't be a separate alert.

Accessing alerts



TOPICS

- Client alerts
- Customer alerts
- Agency alerts
- Logon alerts

- First we'll look at where you access alerts.
- You'll find them in four different places - for client alerts, customer alerts, agency alerts and logon alerts.
- Your access to these alerts will depend on your user access.
- We'll take you through each of them now.

Consolidated client alerts in the intermediary centre are available for those who:

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

< CLIENT 6

Intermediary centre

TA Owner
email@email.com

Intermediary centre

Alerts **12**

Q 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
- > Submit a short-process ruling Submit a short-process ruling request on behalf of a client
- > Client registration Register a client for a new IRD number or tax type 

- We'll start with client alerts. These are mostly based on subscriptions. All the alerts for the clients you're subscribed to are consolidated in the Alerts tab in the Intermediary centre.
- You will be able to subscribe to a maximum of 1,250 client accounts per logon.
- The consolidated alerts tab in the intermediary centre will be available for:
 - those with 'tax preparer' access to the client (and have subscribed to the client)
 - those who are nominated persons or have token access.

However, for nominated persons and those with 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.

CLIENT 6

111-111-111
1 FAKE STREET, FAKETOWN 1000

Welcome, TA Administrator

You last logged in on Friday, Jul 16, 2021 11:38:44 AM

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

Summary Alerts ⁵ I want to...

Alerts tab - all alerts for this customer

Account panels - alerts for each account

Dividend withholding tax

CLIENT 6
111-111-111-DWT003
Alerts ¹

Total balance: \$0.00

Due now: \$0.00

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

GST

CLIENT 6
111-111-111-GST004
Alerts ²

Total balance: \$9,799.71

Due now: \$9,799.71

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

Income tax

CLIENT 6
111-111-111-INCO02
Alerts ²

Total balance: \$0.00

Due now: \$0.00

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

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

- The Alerts tab is at the top of the account panels and houses all the alerts for that customer.
- 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 go into a client for the first time in a while, one that you aren't subscribed to, you'll likely see a lot of unread letter alerts.

< CLIENT 6

Intermediary centre

Ta Owner
email@email.com

Intermediary centre Alerts 12

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

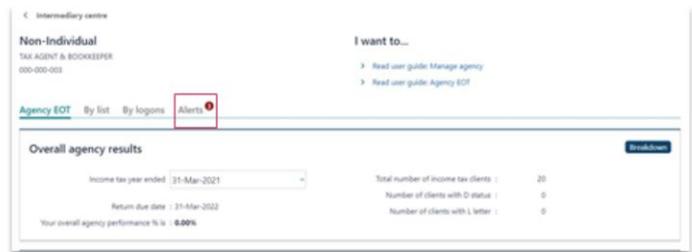
- > Agency reports Access a variety of different client information, activity and agency performance reports
- > **Manage agency** Allows you to manage staff access roles and security for your client lists
- > Update key office holders Add and remove key office holders for a tax preparer

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
- > Submit a short-process ruling Submit a short-process ruling request on behalf of a client
- > Client registration Register a client for a new IRD number or tax type

Manage agency link available to:

- owners
- administrators
- restricted administrators



Intermediary centre

Non-Individual
TAX AGENT & BOOKKEEPER
000-000-000

I want to...

- > Read user guide Manage agency
- > Read user guide Agency EOF

Agency EOF By list By logons **Alerts** 12

Overall agency results Download

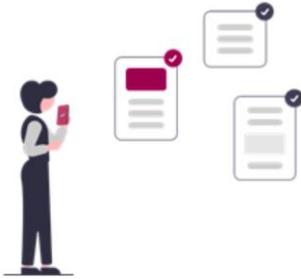
Income tax year ended: 31-Mar-2021

Return due date: 31-Mar-2022

Your overall agency performance % is: **0.00%**

Total number of income tax clients: 20
Number of clients with D status: 0
Number of clients with L letter: 0

- Your own agency alerts are under the 'Manage agency' link in the Intermediary centre. This is where you'll find alerts for filing your own GST and payroll as well as any mail alerts for accounts you have access to.
- The 'manage agency' link is still only available to owners, administrators and restricted administrators and you'll only see account alerts if you have access to that account. For example you'll only see letters or filing reminders for the agency's own GST if you have access to the GST account.
- Customer level mail alerts are only visible to Owner and Administrator users.



Users and restricted users with access to a first party account (eg your agency's GST account) can:

- view agency alerts in the same way as you would view a customer account alert
- add them to favourites
- view the accounts you've been given access to

- Users and restricted users who have been delegated access to a first party account, such as access to your own agency's GST account, can view agency alerts in the same way as you would view a customer account alert.
- You can set the agency as a 'favourite' and monitor alerts from there, but you'll only be able to view the accounts that you've been given access to. If you only have access to the GST account that is all you will see when you add the agency to your favourites.
- You'll still receive an email advising when a letter has been set for that GST account as this is based on who has first party access.

Logon details

TA Administrator
email@g.co

Welcome, TA Administrator

You last logged in on Wednesday, Jul 28, 2021 4:20:59 PM

[Manage my profile](#) 1
Intermediary centre



< Home

Manage my profile

TA Administrator
email@g.co

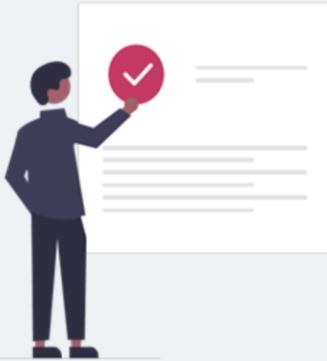
Profile **Alerts** 1 I want to...

Type to filter

TA Administrator email@g.co	1 unread message You have an unread message Your unread message	×
--------------------------------	--	----------------

- You'll also be able to see your own logon alerts.
- You will access these through the 'Manage my profile' link in the top right hand corner of either the home page or within a customer account - it's just above the link to the Intermediary centre.
- These show you alerts about secure mail messages for your logon.
- You'll see the familiar red dot showing the number of alerts alongside the 'Manage my profile' link.

Actioning alerts

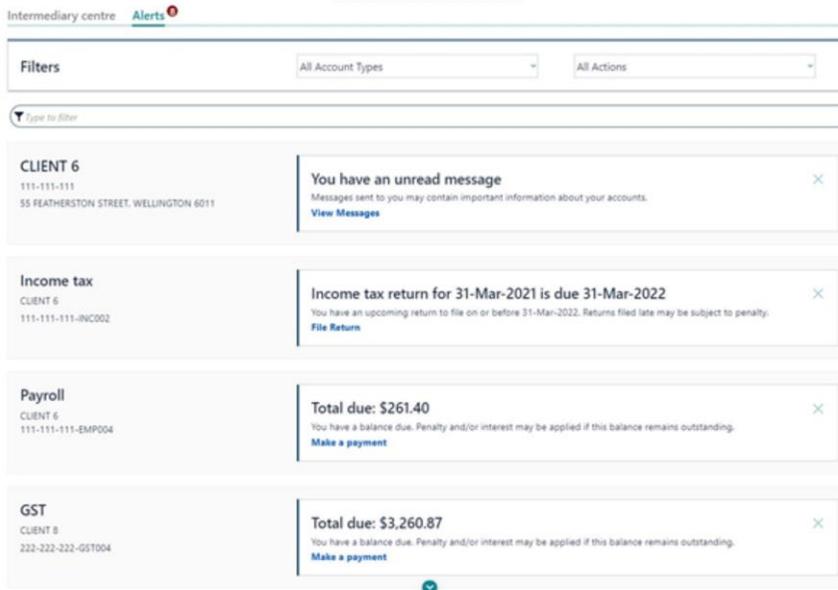


TOPICS

- Actioning alerts
- Dismissing alerts
- Viewing dismissed alerts
- Restoring alerts

Now we'll look at what alerts look like and how you take action on them.

Filter by
account or
action



Or use the
free text
filter bar

- We've told you where you can access alerts. Now, here's an example of how they will look.
- Alerts can be filtered by account or by the action required using the drop down boxes.
- Alternatively, you can use the free text filter to search.
- Alerts are grouped by account and customer level. For example, this screen shot shows that:
 - Client 6 has: a customer level alert that there's an unread message; and two account level alerts - for filing a return and making a payment.
 - Client 8 has an account level alert to make a GST payment.

Intermediary centre **Alerts** 9

Filters

Type to filter

CLIENT 6 111-111-111 55 FEATHERSTON STREET, WELLINGTON 6011	You have an unread message Messages sent to you may contain important information about your accounts. View Messages	
Income tax CLIENT 6 111-111-111-INC002	Income tax return for 31-Mar-2021 is due 31-Mar-2022 You have an upcoming return to file on or before 31-Mar-2022. Returns filed late may be subject to penalty. File Return	
Payroll CLIENT 6 111-111-111-EMP004	Total due: \$261.40 You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding. Make a payment	
GST CLIENT 8 222-222-222-GST004	Total due: \$3,260.87 You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding. Make a payment	



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' link on the Income tax panel will take you to the return for that period. The alerts tab provides easy navigation - to see what needs to be done and then take action. However, you'll also find this task through the 'More' menu on the client's Income tax account.

Intermediary centre

Johnny Test
example@email.com

Intermediary centre **Alerts** 1

Filters All Account Types All Actions

Type to filter

CLIENT 6
111-111-111
55 FEATHERSTON STREET, WELLINGTON 6011

You have an unread message
Messages sent to you may contain important information about your accounts.
[View Messages](#)

GST
CLIENT 8
222-222-222-GST004

Total due: \$3,260.87
You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.
[Make a payment](#)

GST
Client, 2
333-333-333-GST003

GST return for 31-May-2021 was due 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 Return](#)

[View dismissed alerts](#)

Dismiss an alert 

- 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. Your client, or other people in your organisation with access to that account, will still see the alert.

Intermediary centre

Johnny Test
example@email.com

Intermediary centre **Alerts** 1

Filters

- CLIENT 6**
111-111-111
55 FEATHERSTON STREET, WELLINGTON 6011
You have an unread message
Messages sent to you may contain important information about your accounts.
[View Messages](#)
- GST**
CLIENT 8
222-222-222-GST004
Total due: \$3,260.87
You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding.
[Make a payment](#)
- GST**
Client, 2
333-333-333-GST003
GST return for 31-May-2021 was due 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 Return](#)

[View dismissed alerts](#)

View dismissed alerts



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

< Intermediary centre

Dismissed alerts

Johnny Test
example@email.com

Type to filter

GST Client 2 333-333-333-GST003	GST return for 30-Jun-2021 is due 28-Jul-2021 You have an upcoming return to file on or before 28-Jul-2021. Returns filed late may be subject to penalty. File Return	
Income tax CLIENT 6 111-111-111-INCD02	Income tax return for 31-Mar-2021 is due 31-Mar-2022 You have an upcoming return to file on or before 31-Mar-2022. Returns filed late may be subject to penalty. File Return	
Payroll CLIENT 6 111-111-111-EMP004	Total due: \$261.40 You have a balance due. Penalty and/or interest may be applied if this balance remains outstanding. Make a payment	

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



31 March 2023

Due date for clients of a tax agent with an extension of time



between 1 April 2022 and 31 March 2023

Alert dismissed



21 March 2023

Alert comes back as a reminder

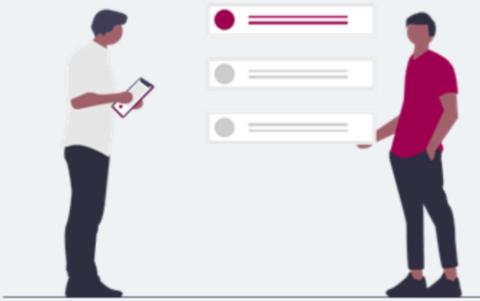


After 31 March 2023

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 when 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.
 - For clients of a tax agent with an extension of time, it is not due until 31 March 2023.
 - You can dismiss the alert anytime between 1 April 2022 and 31 March 2023.
 - The alert will then come back on 21 March 2023 as a reminder.
 - Once 31 March 2023 passes and it is overdue, the alert will show every time you log in, even if you have dismissed it

Thank you



SEE MORE WEBINARS

www.ird.govt.nz/bt-webinars

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, for your clients, your agency and your logon when we upgrade myIR.
- Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.