
Managing profiles and logons in myIR

IR Business Transformation

OCTOBER 2021

Purpose



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

Information is correct as at October 2021

MANAGING PROFILES AND LOGONS IN myIR

FOR

- Businesses
- Individuals
- Tax intermediaries

TOPICS

- Registering for myIR
- Maintaining web logon details
- Creating additional logons for you/your business
- Creating third party access – Nominated Persons
- For the Nominated Person (NOP):
 - claiming access to account(s) you're a NOP for
 - accessing account(s) you're a NOP for
- Managing, viewing and editing third party access

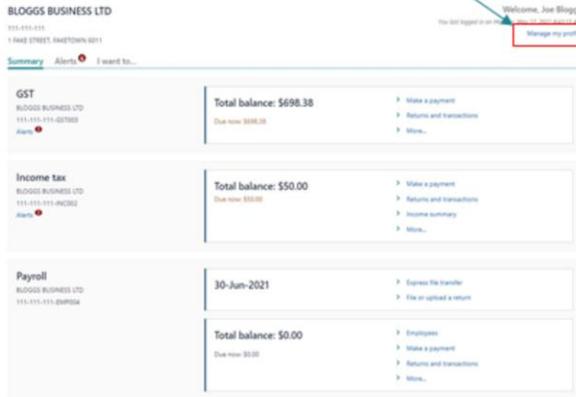
- In recent webinars we've introduced the new version of myIR including the new look and feel, key navigation changes and how alerts will work.
- In this short presentation we'll talk about managing your profile and logons.
- The information is correct as at October 2021.



- Registering for myIR stays the same
- Go to our website and click on the Register button in the top right corner
- The steps are the same

- Registering for myIR stays the same – start by clicking on the 'Register' button on our web page and follow the steps.
- The 'Register' button is in the top right hand corner of the home page.

Manage my profile link



BLOGGS BUSINESS LTD
111-111-111
1 FINE STREET, HAMILTON 0111

Summary Alerts I want to...

GST
BLOGGS BUSINESS LTD
111-111-111-00100
Alerts

Total balance: \$698.38
Due now \$698.38

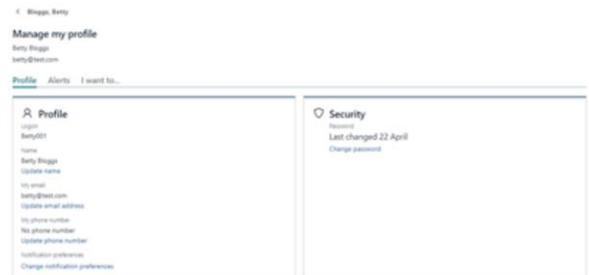
Income tax
BLOGGS BUSINESS LTD
111-111-111-00002
Alerts

Total balance: \$50.00
Due now \$50.00

Payroll
BLOGGS BUSINESS LTD
111-111-111-00004

30-Jun-2021

Total balance: \$0.00
Due now \$0.00



Manage my profile
Berty Bloggs
berty@berty.com

Profile Alerts I want to...

Profile

name
Berty Bloggs
Update name

My email
berty@berty.com
Update email address

My phone number
My phone number
Update phone number

Notification preferences
Change notification preferences

Security

Recent
Last changed 22 April
Change password

- 'Manage my profile' replaces 'settings'
- You can update personal details – e.g. updating your email address
- You'll see the new look and feel – other than that it's the same as before
- Tax intermediaries' logons will give them access to the Intermediary centre

- You can manage your web logon details, through the 'Manage my profile' link in the customer account. You'll find the link at the top right hand corner of your landing page. This replaces 'Settings'.
- Here you can update personal details like your name, email address and contact number.
- Once you go into these tasks you'll see the fields have the new look and feel but are otherwise the same as before.
- Tax intermediaries will have logons that give them access to the Intermediary centre. They won't have to do anything to get this access when we upgrade to the new version, it will happen automatically.

Additional logons - creating a logon under your IRD number to give someone access to your own accounts or your business accounts.

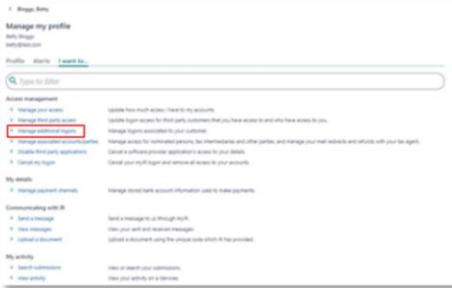
- Owners and Administrators can create the additional logons. Administrators can only give access to those customers and accounts that they themselves have been given access to.
- When creating the additional logon you can set the access:

Administrators	can access any account the owner grants access to, can create logons for users or other admin, and can access the customer level mail*.
Restricted administrators	can do the same as administrators except they can't access the customer level mail*.
Users	can access accounts the owner or administrator grants them access to. They can see the accounts they have access to, notices and letters. They can't access customer level mail*.
Restricted users	can only submit account level requests. If they have an Intermediary logon type they can't link or delink clients or make financial transfers.

- This access hasn't changed with the myIR upgrade.

*Customer level mail refers to letters that aren't account specific e.g. they relate to your IRD number status, or are for a combination of accounts like debt or audit notices

- You can create additional logons under your IRD number to give someone access to your own accounts or your business accounts. These are usually added to give access for employees or co-workers to act on your behalf.
- This is different from granting access to 'other' customers (such as Nominated Persons).
- We'll discuss Nominated Persons shortly. First we'll look at creating an additional logon for you or your business.
- Owners and Administrators can create the additional logons. Administrators can only give access to those customers and accounts that they themselves have been given access to.
- When creating the additional logon you can set the access – this access hasn't changed.
 - **Administrators** can access any account the owner grants access to, they can also create logons for users or other admin, and they can access the customer level mail
 - **Restricted administrators** can do the same as administrators except they can't access the customer level mail
 - **Users** can access accounts that the owner or administrator have granted access to, they can't access customer level mail but will see the accounts they have access to including notices and letters
 - **Restricted users** can only submit account level requests. If they have an Intermediary logon type they can't link or delink clients or make financial transfers.



To add a logon – go to:

Manage my profile > I want to...> Manage additional logons

- To create an additional logon, go to 'Manage my profile'.
- Under the 'I want to...' tab select 'Manage additional logons'.
- From there you can add the logon by completing the details.

Create additional logons for you or your business

Additional logons

Add additional logon
Briggs, Betty
000-000-001

Add additional logon

Add access Grant access to accounts

The web logon will still be created if you don't grant access to any accounts now. You will be able to manage access for this logon at any time, from [Manage additional logons](#).

Select first party accounts to grant access

Briggs, Betty - 000-000-001

Account type	Account ID	Account permissions
<input checked="" type="checkbox"/> Income tax	000-000-001-INC302	File

No first party account access to grant at this time.
Would you like to add access to your third party customer?
Yes No

Cancel Previous Next

Give the access level

Add additional logon
Briggs, Betty
000-000-001

Add additional logon

Add access Grant access to accounts

The web logon will still be created if you don't grant access to any accounts now. You will be able to manage access for this logon at any time, from [Manage additional logons](#).

Select first party accounts to grant access

Briggs, Betty - 000-000-001

Account type	Account ID	Account permissions
<input checked="" type="checkbox"/> Income tax	000-000-001-INC302	File

No first party account access to grant at this time.
Would you like to add access to your third party customer?
Yes No

Select third party accounts to grant access

BD0000 BIG BIRDHOUSE - 000-000-002

Account type	Account ID	Account permissions
<input type="checkbox"/> Dividend withholding tax	000-000-002-DWT302	
<input checked="" type="checkbox"/> GST	000-000-002-GST304	File
<input type="checkbox"/> Income tax	000-000-002-INC302	
<input checked="" type="checkbox"/> Payroll	000-000-002-EMP305	Read only

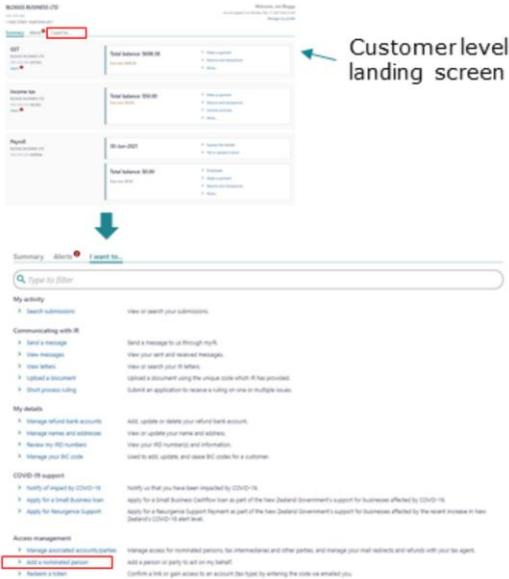
BD0000 MASTER BIRDHOUSE - 000-000-003

Account type	Account ID	Account permissions

Cancel Previous Next

You can also grant them access to other customers you have access to

- When creating an additional logon, you choose the accounts you want them to have access to, and the access levels (for example 'read only' or 'file').
- If you have access to other customers, there's an additional option to grant access to them as well.



Third party access

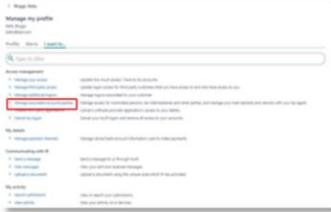
Often it is better for customers to give third party access

A Nominated Person (NOP) can act on your behalf.

- Add a new NOP through your **customer account** 'I want to...' tab
- 'I want to...'>Add a nominated person
- Follow the steps to give a NOP access to the accounts you want them to see

- Often it is better to give someone third party access to your accounts. This means you don't need to create an additional logon for them. They can use their own myIR user ID and password to access your accounts, instead of having to remember multiple logins and passwords.
- To do this you can set them up as a Nominated Person (NOP) to act on your behalf.
- To give third party access to a Nominated Person.
 - Add a new Nominated Person through your **customer account** 'I want to...' tab
 - Go to 'Add a nominated person'
 - There you can add a Nominated Person and follow the steps to give them access to the accounts you want them to see

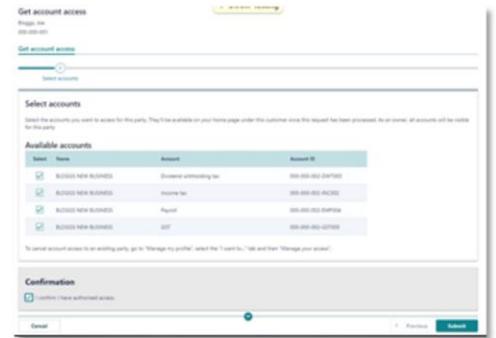
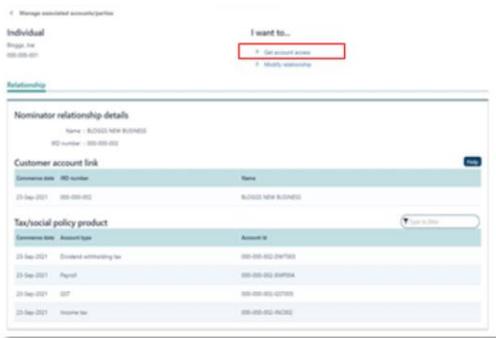
For the Nominated Person – claiming access to the account(s)



2. View or edit the relationship

1. Manage my profile > Manage associated accounts/parties

3. Get access



- Now we'll look at what the Nominated Person needs to do.
- Once nominated, you need to claim access to the accounts for the first time.
- To do this:
 - logon to your own myIR account
 - Go to 'Manage my profile' > 'Manage associated accounts/parties' > 'View or edit the relationship' > 'Get account access'
- You will then have access to those accounts as a nominee.

Last viewed:
Bloggs, Joe

Welcome, Joe Bloggs
You last logged in on Thursday, Apr 29, 2021 3:17:18 PM
[Manage my profile](#)

Select a customer:

Type to filter

BLOGGS NEW BUSINESS 000-000-002 2 outstanding alerts
Bloggs, Joe 000-000-001

The account
Joe Bloggs is
a NOP for

Joe Bloggs'
own account

- For the Nominated Person – when you go back to your landing page, the nominator will be there as a customer.
- If this is the first time you've had access to the account of another person or entity you might notice that your landing page has changed. Rather than going straight to the list of your account types, you will have a choice of customers (yours and the person or entity you are a Nominated Person for). You can select which customer account you want to access at any given time.

Manage my profile
 User: Bloggs, Terry
 Email: terry@bloggs.com

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

Type to filter

Access management

- Manage your access Update how much access I have to my accounts.
- Manage third party access** Update logon access for third party customers that you have access to and who have access to you.
- Manage additional logons Manage logons available for your customers.
- Manage associated accounts/parties Manage access for nominated persons, tax intermediaries and other parties, and manage your mail redirects and refunds with your tax agent.
- Disable third party applications Cancel a software provider application's access for your details.
- Cancel my logon Cancel your myIR logon and remove all access to your accounts.

My details

- Manage payment channels Manage stored bank account information used to make payments.

Communicating with IR

- Send a message Send a message to us through myIR.
- View messages View your sent and received messages.
- Upload a document Upload a document using the unique code which IR has provided.

My activity

- Search submissions View or search your submissions.
- View activity View your activity on a device.



Manage my profile

Manage third party access

Here you can:

- Decide if third parties can request access to your account
- Manage logon access for third party customers you have access to
- Manage logon access for third party customers (not intermediaries) who have access to you

To manage access for third party intermediaries, go to I want to > Manage associated accounts/parties.
 To add new logons, go to Manage additional logons.

Allowed: Yes

Additional logons

Username	Name	Email
Bloggs1	Joe Bloggs	test@test.com
Joe1	Joe Bloggs	test@test.com



Manage access for Joe1

BLOGGS NEW BUSINESS - 000-000-001

Access role	Access role ID	User	Cancel access
Dividend withholding tax	000-000-001-DWT003	Full account access	Cancel access
GST	000-000-001-GST005	Full account access	Cancel access
Income tax	000-000-001-INC002	Full account access	Cancel access
Payroll	000-000-001-EMP004	Full account access	Cancel access

- Once the Nominated Person has claimed access, the nominator can manage third party access through 'Manage my profile' > 'I want to...' > 'Manage third party access'. This includes cancelling access.
- Here you can see third party logons (other than tax intermediary logons) who have access to you and who you have access to.
- So once the person you have granted access to has claimed access to your accounts - you will be able to see their logon here.

Manage my profile

Profile Alerts I want to...

Access management

- Manage your access
- Manage third party access
- Manage additional logins
- Manage associated accounts/parties**
- Cancel third party applications
- Cancel my logins

My details

- Manage payment channels

Communicating with IR

- Send a message
- View messages
- Upload a document

My activity

- Search submissions
- View activity



Manage customer relationships

Non-Individual

BLUGGS NEW BUSINESS
000-000-001

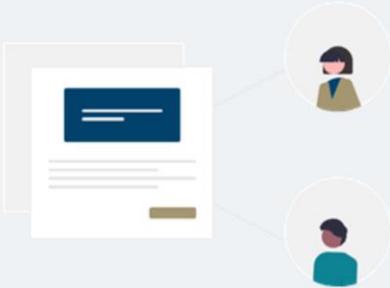
Relationships

Relationships

Name	ID number	Relationship	
My related parties			
Bluggs, Betty	000-000-002	Director	View or edit
Relationships who act for me			
Bluggs, Joe	000-000-003	Nominee	View or edit

- You can also view and edit third party relationships (including cancelling them) from 'Manage my profile' > 'Manage associated accounts/parties'.
- This is where you'll see the relationships for tax intermediaries acting on your behalf.

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

- Thank you for watching this webinar. It has given an overview of how you can manage your profile and logons in the upgraded version of myIR.
- You'll find more webinars about the final Business Transformation Release on our website at www.ird.govt.nz/bt-webinars.
- Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.