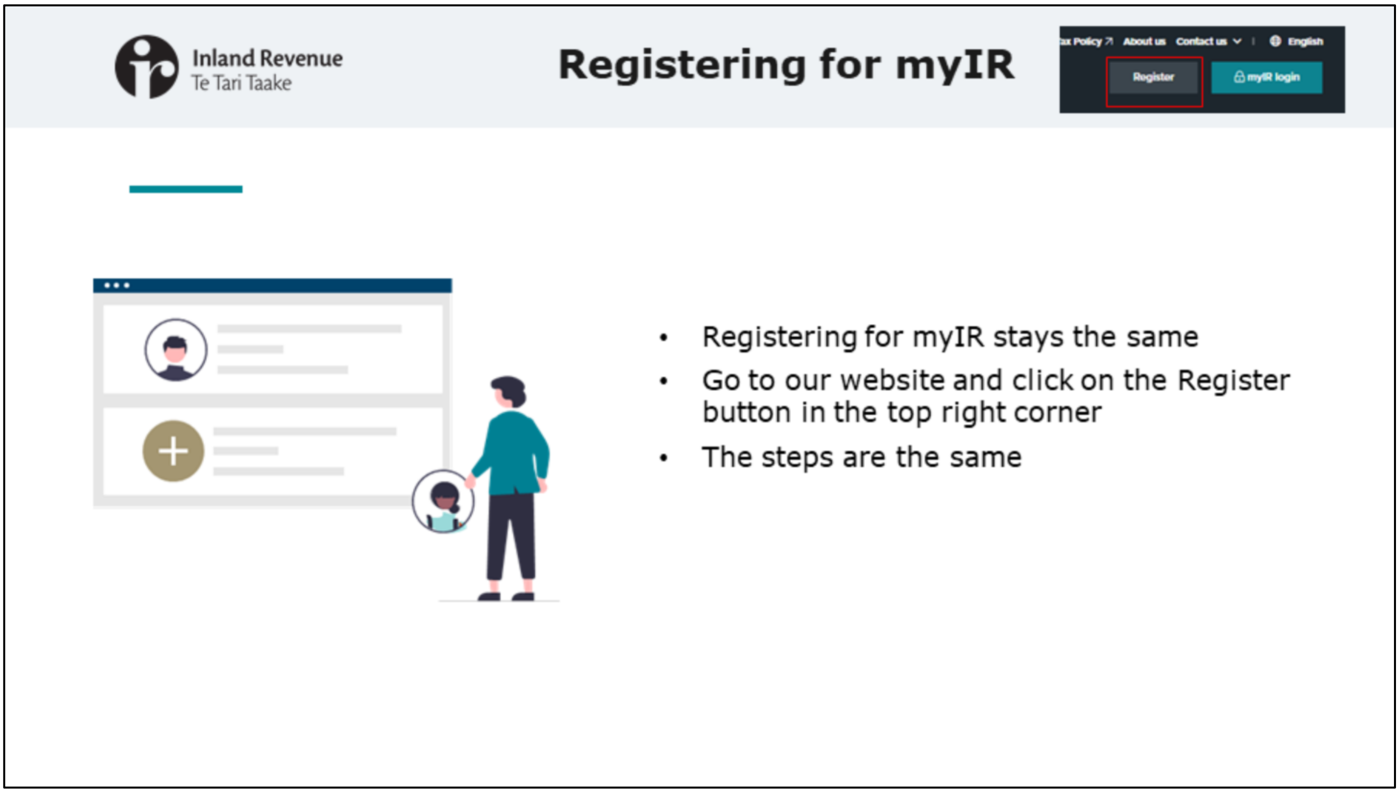
Managing profiles and logons in myIR

IR Business Transformation

OCTOBER 2021

- 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 – 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.

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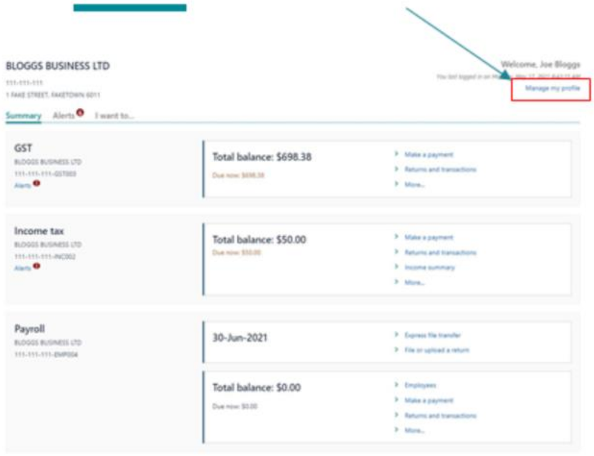
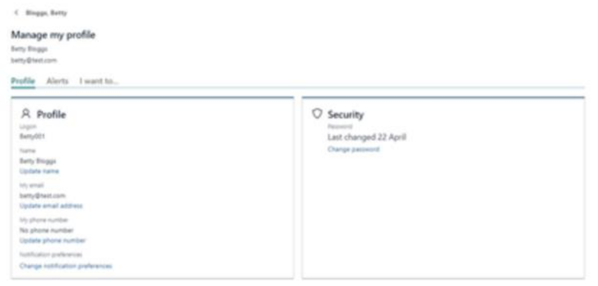
Maintaining logons

Manage my profile link





- '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.

Create additional logons for you or your business

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

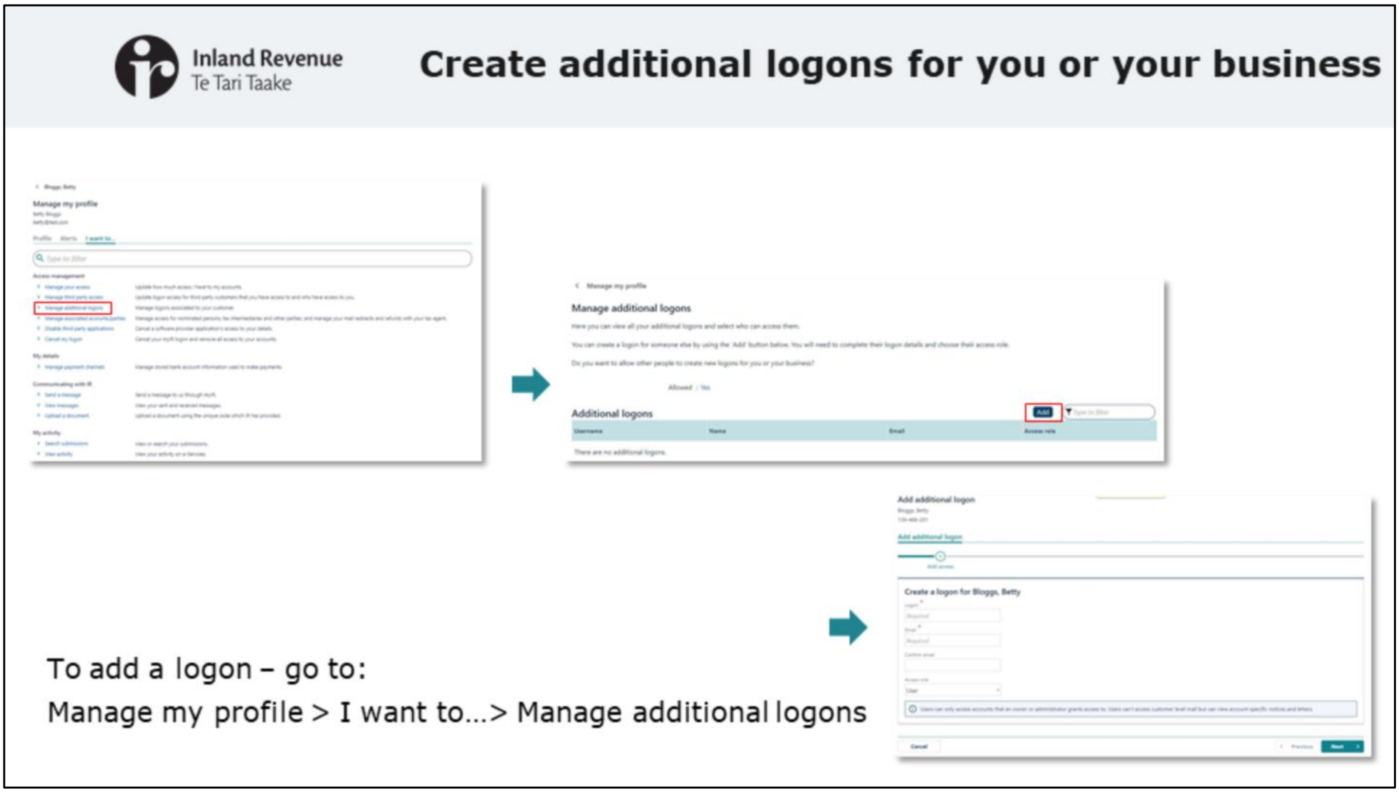
- Owners and Administrators can create the additional logons. Administrators can only give access to those customers and accounts that they themselves have been given access to.
- When creating the additional logon you can set the access:

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 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.

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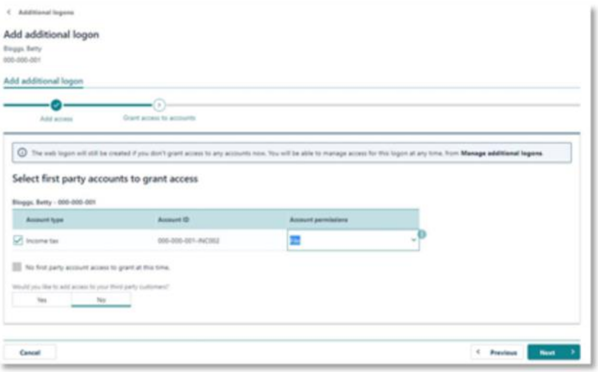
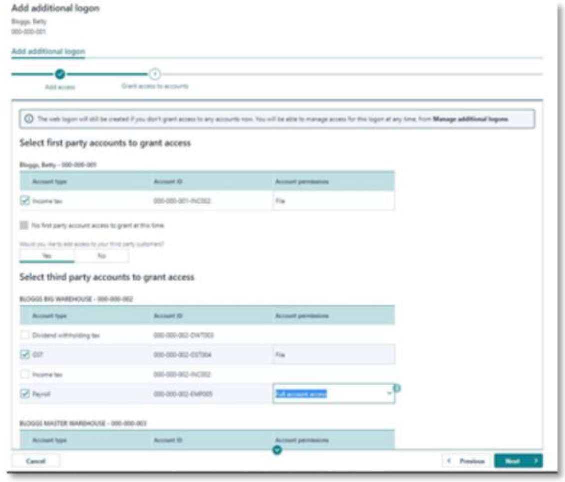
Create additional logons for you or your business



Give the access level



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.

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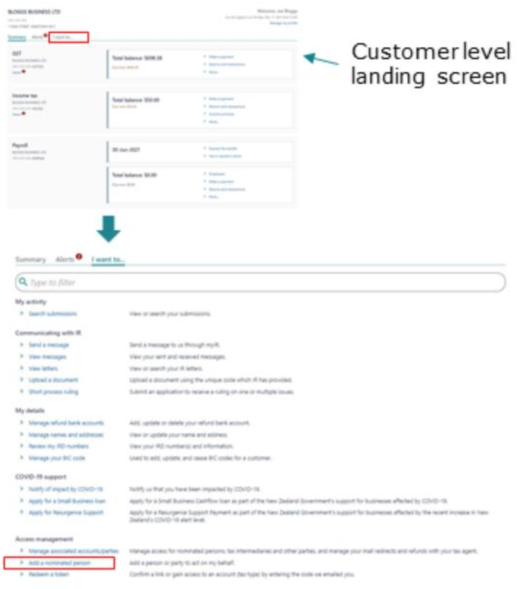
Creating third party access



Customer level landing screen

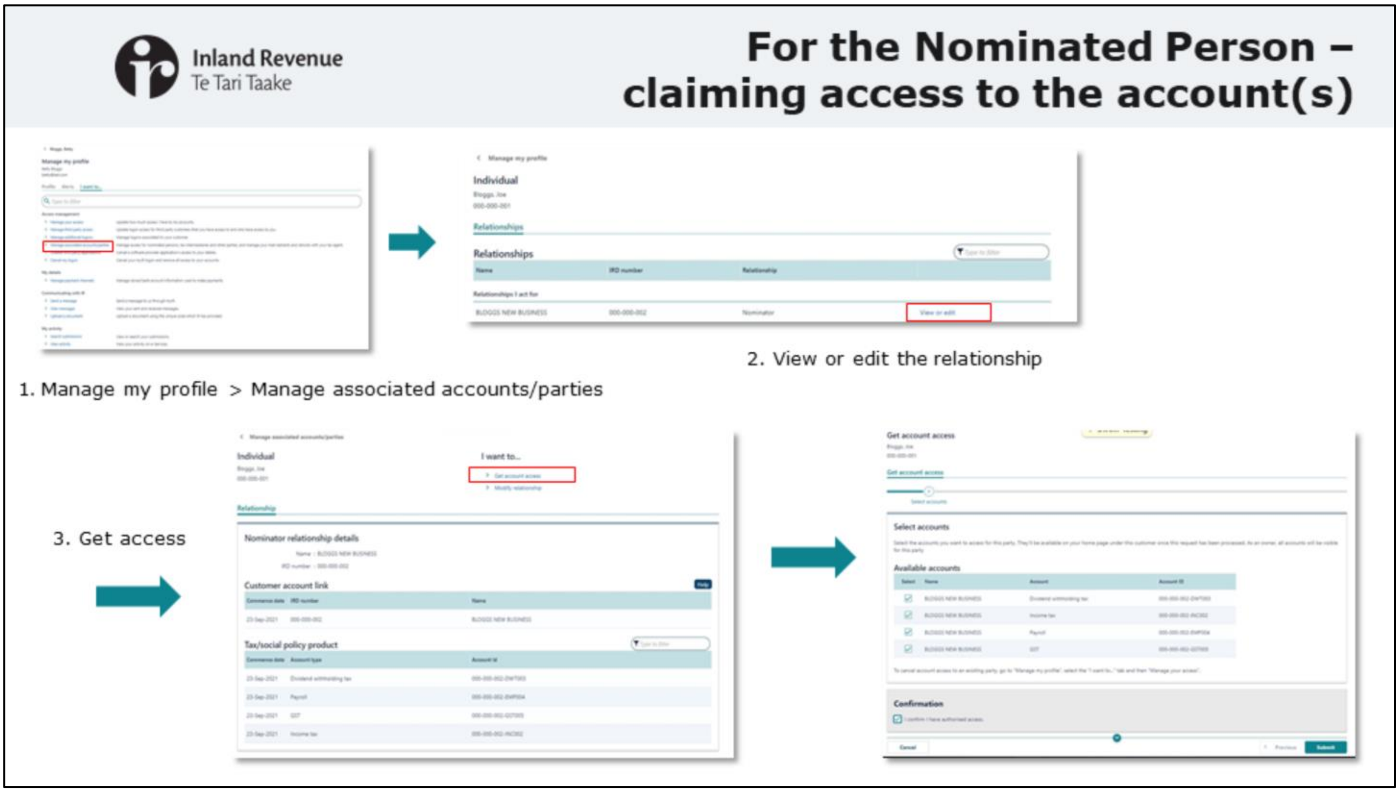
Third party access

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



- 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.

For the Nominated Person – accessing the account(s)

- 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.

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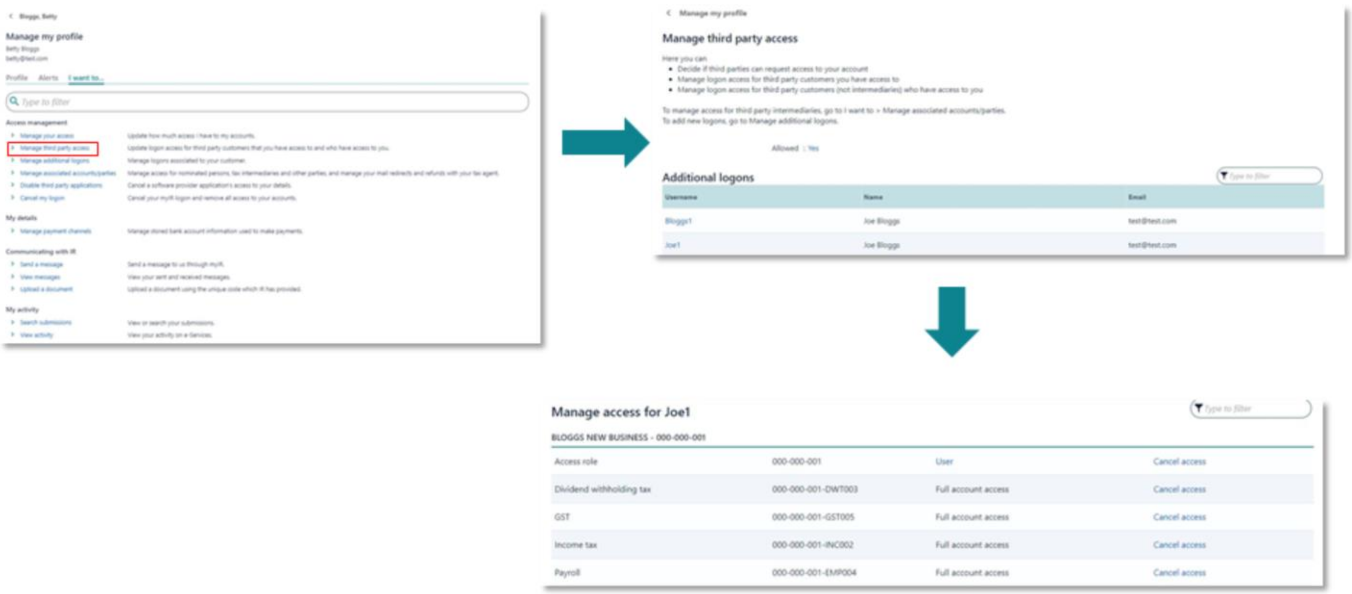
Managing, viewing and editing third party access



- 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.

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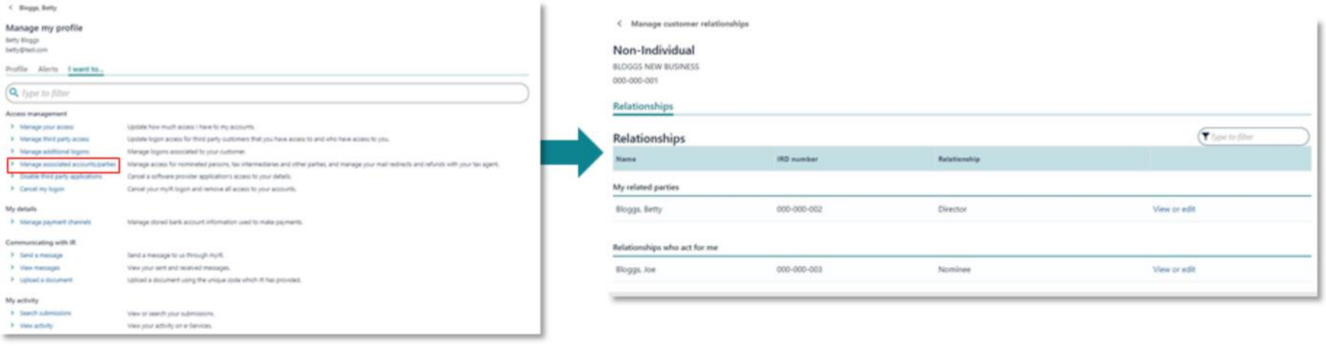
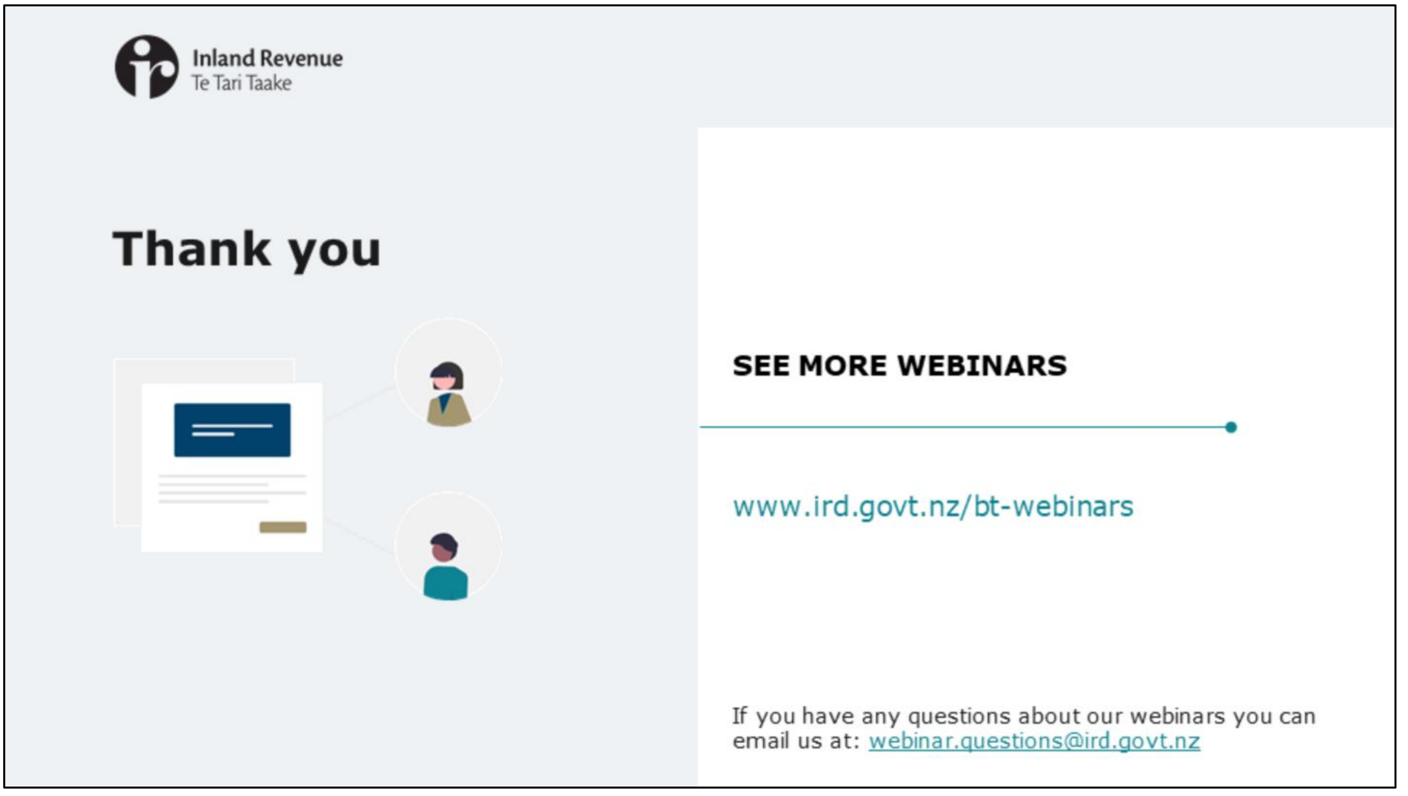
Managing, viewing and editing third party access



- 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 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.