
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

111-111-111-111-111
1 MAID STREET, AUCKLAND 0611

Summary Alerts I want to...

GST BLOGGS BUSINESS LTD 111-111-111-111-111 Alerts	Total balance: \$698.38 Due now \$698.38	Make a payment Returns and transactions More...
Income tax BLOGGS BUSINESS LTD 111-111-111-111-111 Alerts	Total balance: \$50.00 Due now \$50.00	Make a payment Returns and transactions Income summary More...
Payroll BLOGGS BUSINESS LTD 111-111-111-111-111	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...

Welcome, Joe Bloggs

You last logged in on 22 April

[Manage my profile](#)

Bloggs, Betty

Manage my profile

Betty Bloggs

betty@betty.com

Profile Alerts I want to...

Profile	Security
Login Betty001 Name Betty Bloggs Update name My email betty@betty.com Update email address My phone number No phone number Update phone number Notification preferences Change notification preferences	Recover 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.

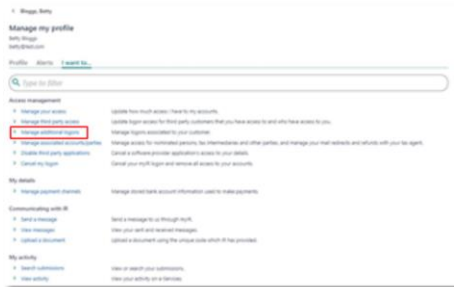
- Owners and Administrators can create the additional logons. Administrators can only give access to those customers and accounts that they themselves have been given access to.
- When creating the additional logon you can set the access:

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.



Add additional logon
Bloggs Betty
123 456 789

Add additional logon
Add logon

Create a logon for Bloggs, Betty

First name

Last name

Username

Password

Confirm password

Access role

Role

Users can only access accounts that an owner or administrator grants access to. Users can't access customer level mail but can view account specific notices and letters.

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

Add additional logon
Briggs, Betty
000-000-001

Add additional logon

1 Add access 2 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-INC002	<input type="text" value="File"/>

☐ No first party account access to grant at this time.

Would you like to add access to your third party customer?

[Cancel](#) [Previous](#) [Next](#)

Give the access level

Add additional logon
Briggs, Betty
000-000-001

Add additional logon

1 Add access 2 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-INC002	<input type="text" value="File"/>

☐ No first party account access to grant at this time.

Would you like to add access to your third party customer?

Select third party accounts to grant access

BUSINESS BROADBANDHOUSE - 000-000-002

Account type	Account ID	Account permissions
<input type="checkbox"/> Dividend withholding tax	000-000-002-DWT003	
<input checked="" type="checkbox"/> GST	000-000-002-GST004	<input type="text" value="File"/>
<input type="checkbox"/> Income tax	000-000-002-INC002	
<input checked="" type="checkbox"/> Payroll	000-000-002-PAY005	<input type="text" value="Read only"/>

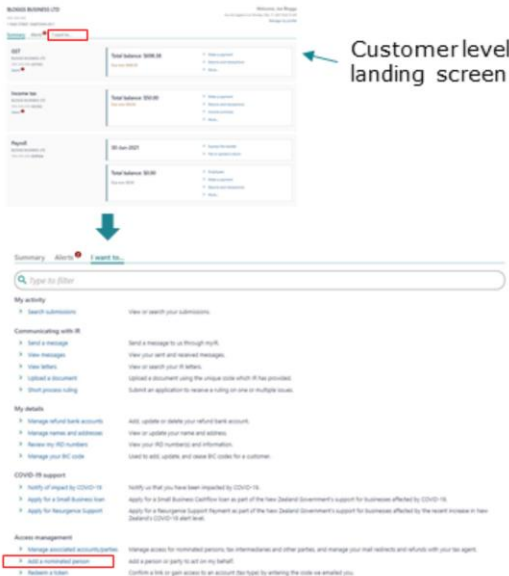
BUSINESS MASTER BROADBANDHOUSE - 000-000-003

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)

1. Manage my profile > Manage associated accounts/parties



2. View or edit the relationship

2. View or edit the relationship

3. Get access



3. Get access



4. Select accounts

- 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.

Managing, viewing and editing third party access

< Bloggs, Betty

Manage my profile
Betty Bloggs
betty@tax.com

Profile Alerts [I want to...](#)

Access management

- Manage your access
- Manage third party access**
- Manage additional logons
- Manage associated accounts/parties
- Disable third party applications
- Cancel my logon

My details

- Manage payment channels

Communicating with IR

- Send a message
- View messages
- Upload a document

My activity

- Search submissions
- View activity



< 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	Access role name	Action
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.

< Bloggs, Betty

Manage my profile
Betty Bloggs
betty@red.com

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

Access management

- Manage your access: Update how much access I have to my accounts.
- Manage third party access: Update login access for third party customers that you have access to and who have access to you.
- Manage additional logins: Manage logins associated to your customer.
- 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.
- Revoke third party applications: Cancel a software provider application's access to your details.
- Cancel my login: Cancel your myIR login 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 message: View your sent and received messages.
- Upload a document: Upload a document using the unique code which it has provided.

My activity

- Search submissions: View or search your submissions.
- View activity: View your activity on e Services.

< Manage customer relationships

Non-Individual
BLOGGS NEW BUSINESS
000-000-001

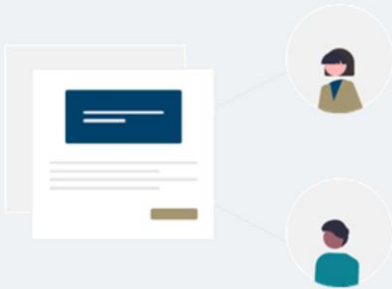
Relationships

Relationships

Name	IRD number	Relationship	
Bloggs, Betty	000-000-002	Director	View or edit
Relationships who act for me			
Bloggs, 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.