

## **SUMMARY:**

# Navigating the new version of myIR

For: businesses, employers, individuals and families



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

It is aimed at:

- Businesses and employers
- Individuals and families

ird.govt.nz/bt-webinars



#### Introduction

Navigation – one of the main things that's changing in the myIR version upgrade

What you do in myIR will be the same

Cleaner, simpler navigation

Fewer clicks

### Logging on



Logon access and security is the same as now

Like now, web logon access will vary (eg for personal account, work account, several entities)

What you see when you log on will depend on whether the logon has access to one or multiple customer accounts

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Multiple accounts	0
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One account (or once customer account selected)

Panels for different accounts types, eg income tax.

Payroll Customer, Individual Total Ibalance: \$575.61	31-Oct-2021	<ul> <li>Express file transfer</li> <li>File or upload a return</li> </ul>
	30-Sep-2021	Express the transfer     Ele or upload a return
	Account 111-111-DAPON Due now: 537561	Employees     Make a payment     Prevent and transactions     More

#### Sub-panels

accounts you have

access to.

- Provide account-specific information
- Account panels are always there; others appear when relevant

#### **Account panels**

- Account type and customer information
- Total balance and payments due
- Links to tasks for each account
- Alert indicators
- All brought up to landing page level

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#### Tabs 'I want to' tab Filtering and searching Three top tabs Tasks are categorised so - Some screens will let you they are easier to find, eq: filter the information on that My activity page (it's not a site-wide Customer, Individual Communicating with IR filter) -111-111-111 123 NOWHERE STREET, SOMEWHERE CITY 5510 My details - Some screens will have a search bar where you can Alerts I want to... Summary Access Management search using key words - Summary: list of accounts - Alerts: tasks that need action - I want to: list of all tasks Task steps 'Breadcrumbs' will show you where you are in the process **MORE INFORMATION** Watch our webinars Visit our website **Business Transformation** What's changing in 2021 webinars ird.govt.nz/business-transformation-2021 We have a separate www.ird.govt.nz/bt-webinars webinar on navigating Webinar.guestions@ird.govt.nz the new version of myIR for tax intermediaries.