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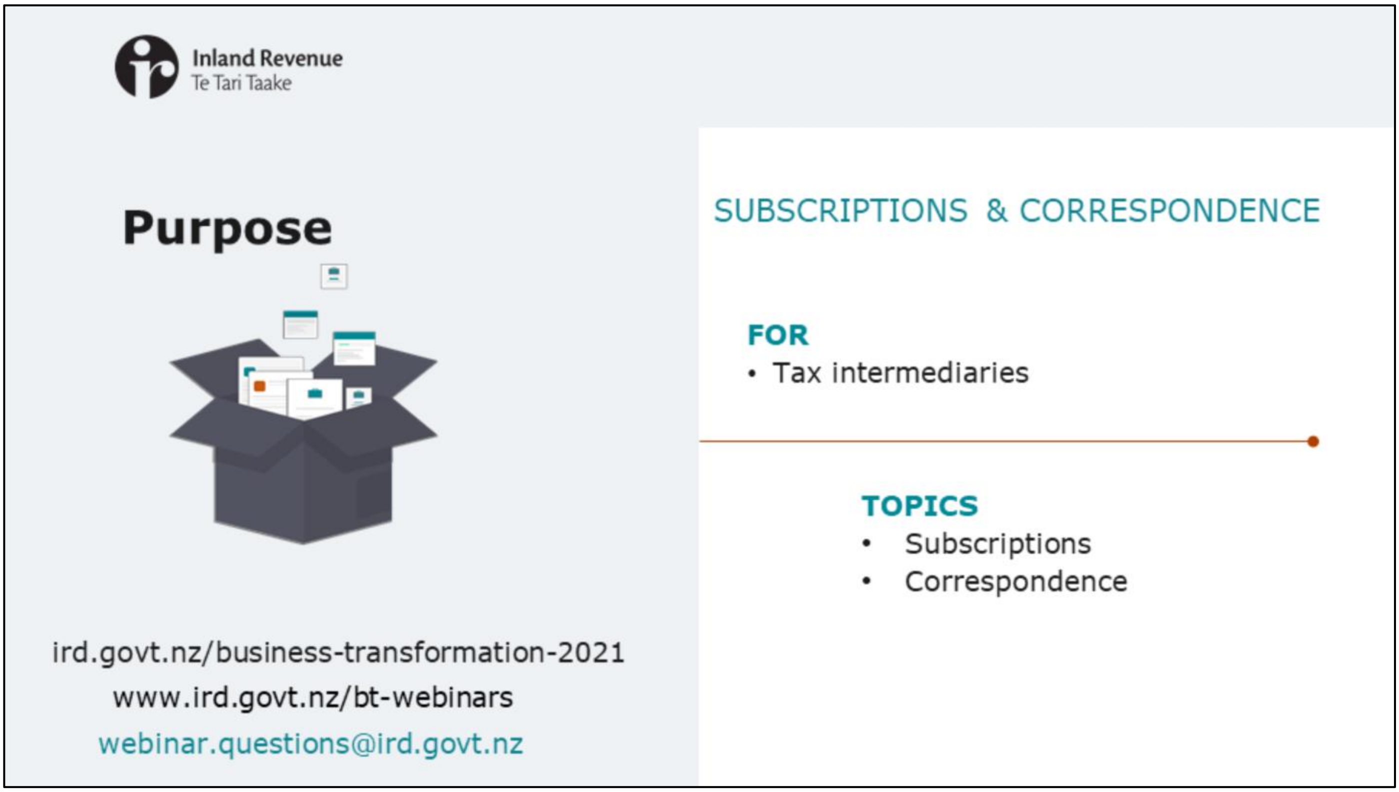
Subscriptions and correspondence in myIR

For tax intermediaries

IR Business Transformation

SEPTEMBER 2021



- In previous webinars we've introduced the new version of myIR including the new look and feel, some of the key navigation changes and how alerts will work. You'll find these, and videos introducing the changes, on our website and on our webinars page.
- In this presentation for tax intermediaries we'll focus on subscriptions and correspondence.

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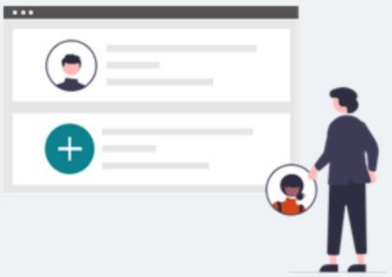
Purpose

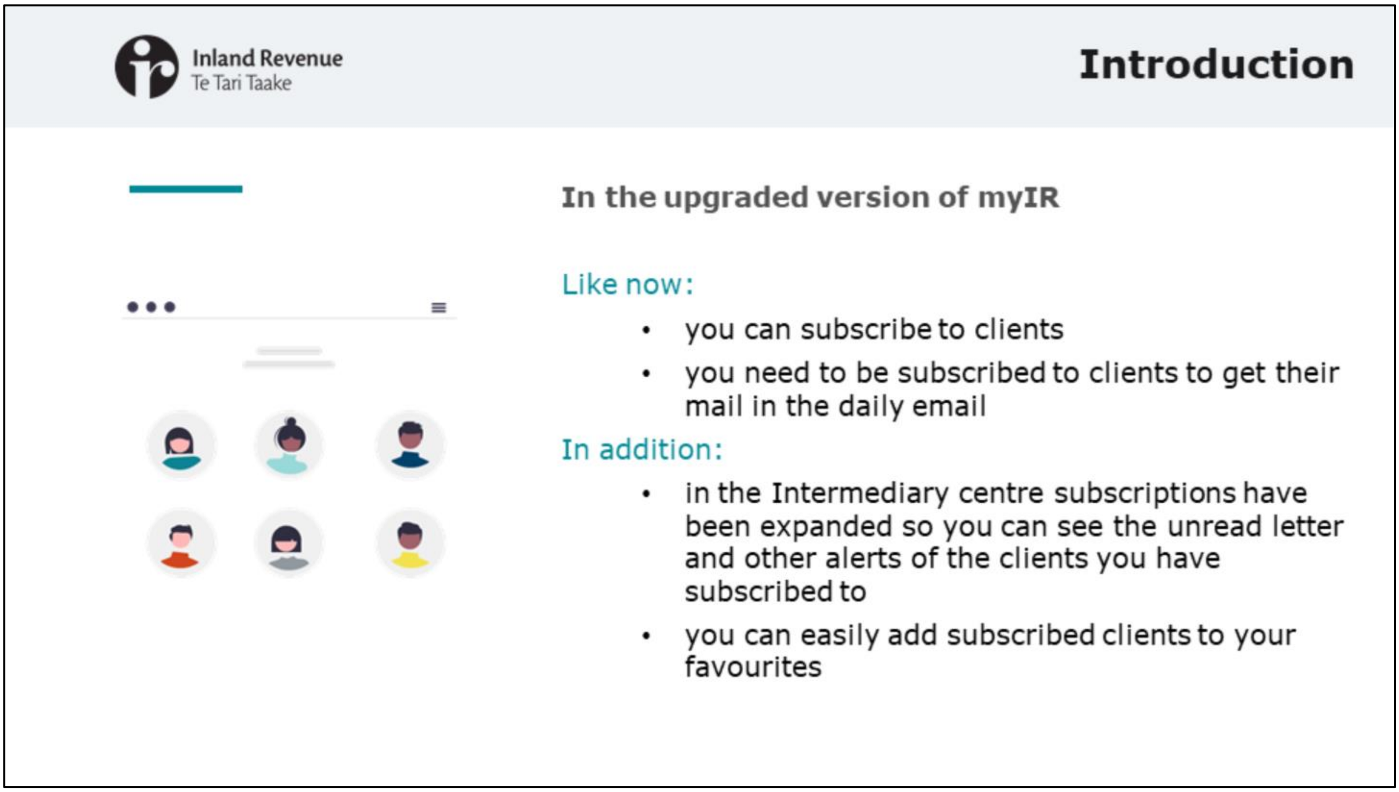


SUBSCRIPTIONS

TOPICS

- Subscribing to clients
- Subscription limits
- Converting subscriptions

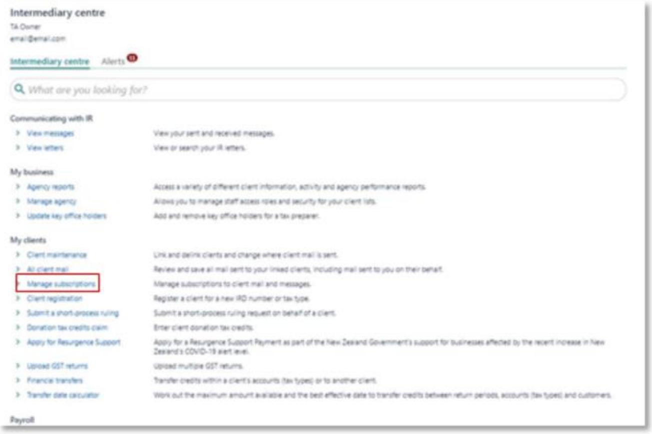
We’ll start by looking at what’s new with subscriptions.

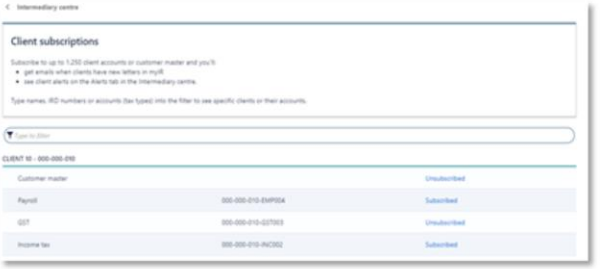


In the upgraded version of myIR:

- Like now:
  - you can subscribe to clients that you need to access regularly, and
  - you need to be subscribed to clients to get their mail in the daily email.
- In addition:
  - In the intermediary centre, the subscription functionality has been expanded so subscriptions aren’t just for client mail, they will also include alerts such as notice of returns due or overdue, payments due etc.
  - you can also easily add subscribed clients to your favourites

Managing subscriptions





You can add and manage subscriptions in the Intermediary centre under My clients>Manage subscriptions.

Note that, unlike now, you won't be able to 'subscribe all' or 'unsubscribe all'.

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Subscription numbers

- Improving performance - there is a maximum number of subscriptions
- Each *logon* is limited to 1,250 subscriptions – this affects tax agents and PAYE intermediaries as they have more subscriptions than other intermediaries
- A subscription refers to:
  - each of the tax types (like GST or INC) that you are subscribed to for your clients
  - for tax agents this includes the customer master link for the customer level mail

    So (e.g.) for a tax agent with the customer master link and subscribed to four accounts for that client, it would count as five subscriptions

- To help resolve some of the performance issues that we know have been a problem for you, subscriptions *per web logon,* will be limited to 1,250.
- This cap affects tax agents and PAYE intermediaries as they have more subscriptions than other intermediaries.
- A subscription refers to each of the tax types (like GST or INC) that you are subscribed to for your clients plus, for tax agents, the customer master link for the customer level mail - so a client with four accounts might count as five subscriptions.

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Converting subscriptions for go live

Bringing subscriptions across when we go live

If you are subscribed to **1,250 or fewer** client accounts:

- all of them will be brought across as subscribed clients at go-live.

If you have **more than 1,250** subscribed accounts:

- only the 1,000 most recently accessed clients, who you have taken action on, will be brought across as subscribed clients at go-live.
- you can then look to see which ones are missing.

How the 1,000 subscriptions are selected:

1. Clients you have submitted web requests for in the last 3 months
2. Then your most recent subscriptions, in date order

The whole client will be subscribed, not just the account that you took an action on.

All subscriptions converted at go-live will be set up for mail and other alerts like return reminders.

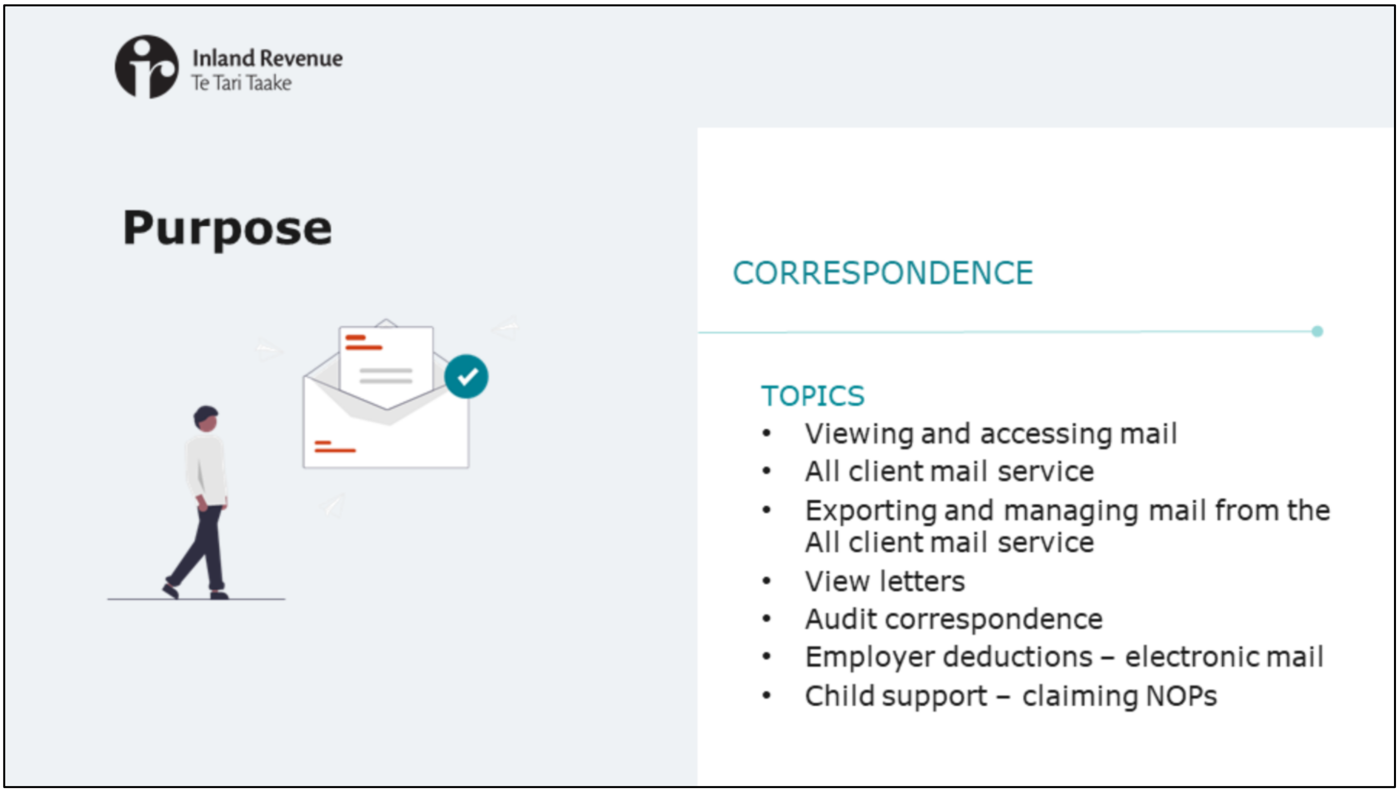
If you are subscribed to 1,250 or fewer client accounts, all of them will be brought across as subscribed clients at go-live.

If you have more than 1,250 subscribed accounts, only the 1,000 clients you most recently took action on will be converted as subscribed clients at go-live. You will then be able to go through them to see which ones are missing that you'd like to add back in, up to the 1,250 limit. Remember that when we say 'you' we mean your specific logon.

Here's how your 1,000 subscriptions will be chosen

- First we'll select the clients you have submitted web requests for over the last three months.
- If that adds up to fewer than 1,000 subscribed accounts, the remainder will be filled with your most recent subscriptions, in date order.
- The whole client will be subscribed, not just the account that you took an action on. So if you are linked to GST, INC and customer master, but the only action you've taken for this customer over the last 3 months is to file the INC return, the whole customer will be subscribed and will count as 3 subscriptions of your total 1,000.
- All subscriptions converted at go-live will be set up for mail and other alerts like return reminders.

We have been working with intermediaries with over 1,250 subscriptions to help ensure they are aware of the limit and to encourage them to reduce their subscription numbers before we go live.



Now we’ll take a look at how you can find and view mail.

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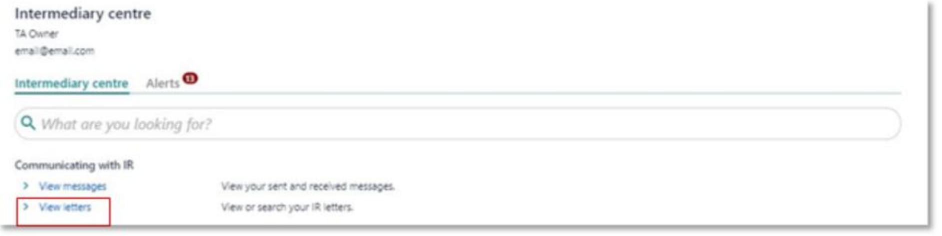
Correspondence – viewing mail

There are three different places where you can view correspondence:

1. Intermediary centre – View letters

   This replaces the Correspondence tab

   Like now, you'll need to be subscribed to a client to see their correspondence showing as 'unread' in here, not just linked.



There are three different places where you can view correspondence.

The first is in the Intermediary centre. Under 'Communications with IR' you'll see 'View letters'.

- This replaces the current Correspondence tab.
- Just like today, in this view you'll need to be subscribed to a client to see their correspondence showing as 'unread' in here, not just linked.

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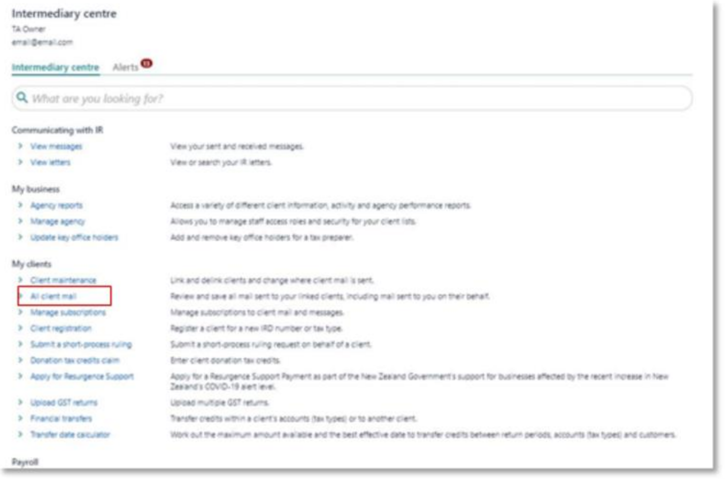
Correspondence – viewing mail

2. Intermediary centre - All client mail

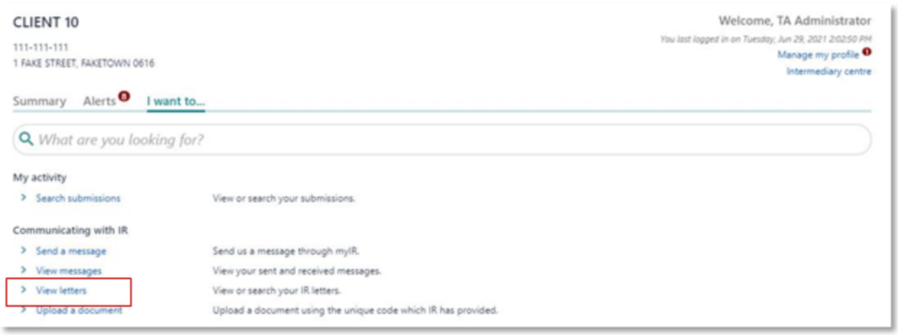


The second is also in the Intermediary centre. Under ‘My clients’ you’ll find ‘All client mail’.

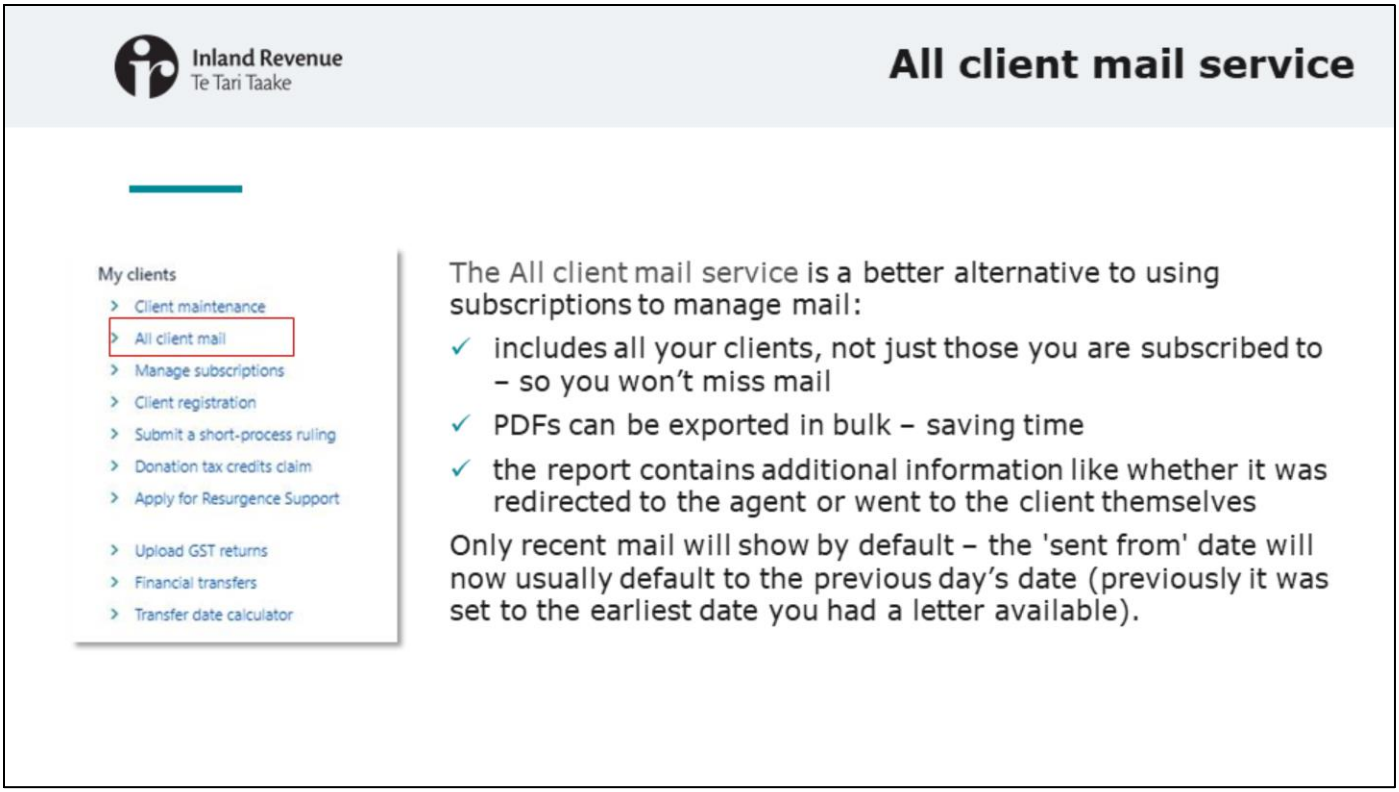
We’ll talk more about the All client mail service in this webinar.

Correspondence – viewing mail

3. In a customer – I want to… View letters



The third is in a client's account under the I want to… tab. Under 'Communicating with IR' you'll see a link to 'View letters'



- The All client mail service is a better alternative to using subscriptions to manage mail.
- It includes all your clients, not just those you are subscribed to so there is no risk of missing mail for newly linked clients if you forget to subscribe.
- The additional functionality to export the letters in bulk saves time as you don't have to save each PDF individually.
- The report also contains additional information such as whether it was redirected to the agent or went to the client themselves.
- The default date in the All client mail report will now be the previous day's date. Previously it had been set to the earliest date you had a letter available – for many that would have been February 2017, the date of our first business transformation release. This change means that only recent mail will display. You can still search for prior dates back to February 2017.

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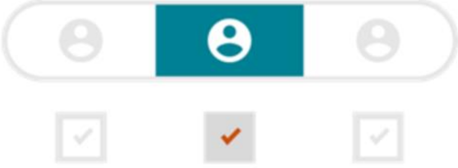
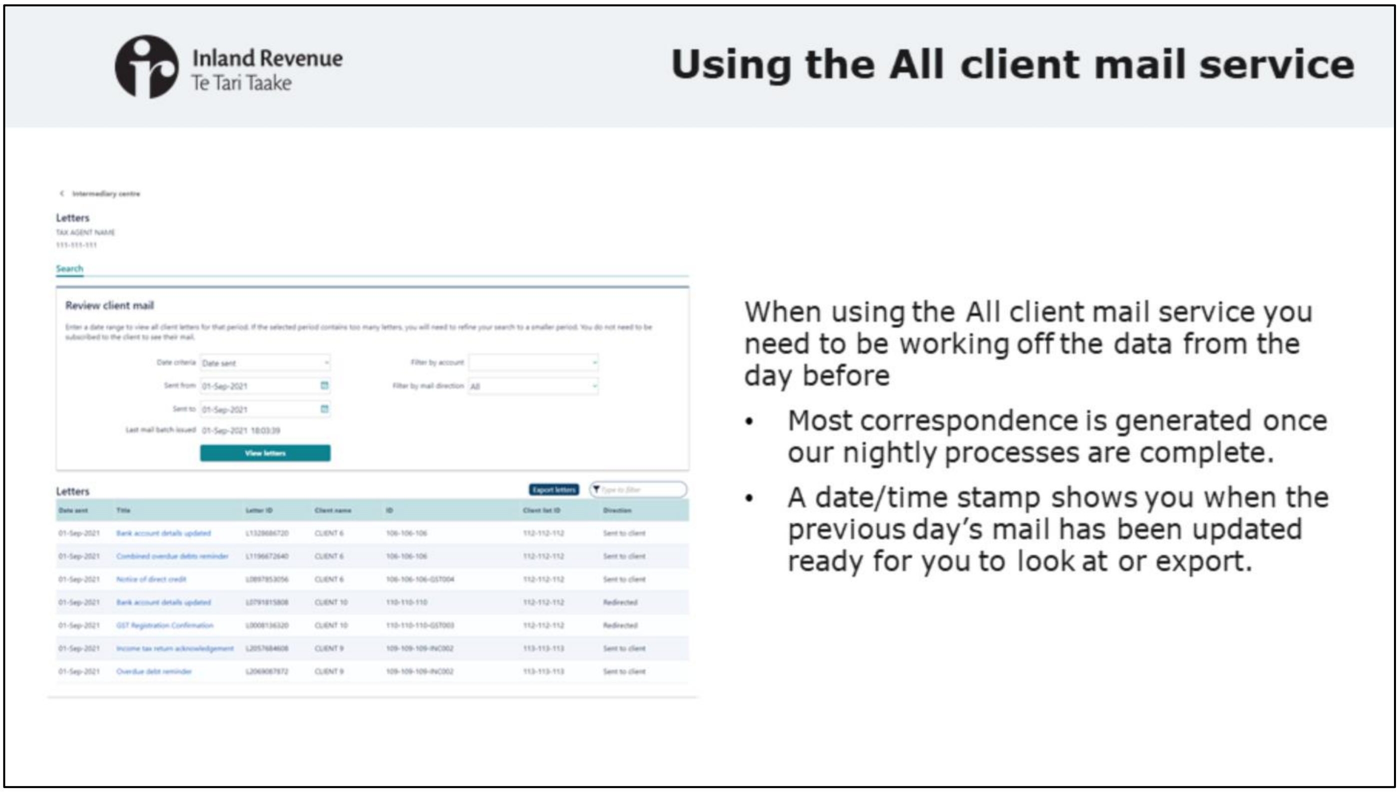
Accessing the All client mail service



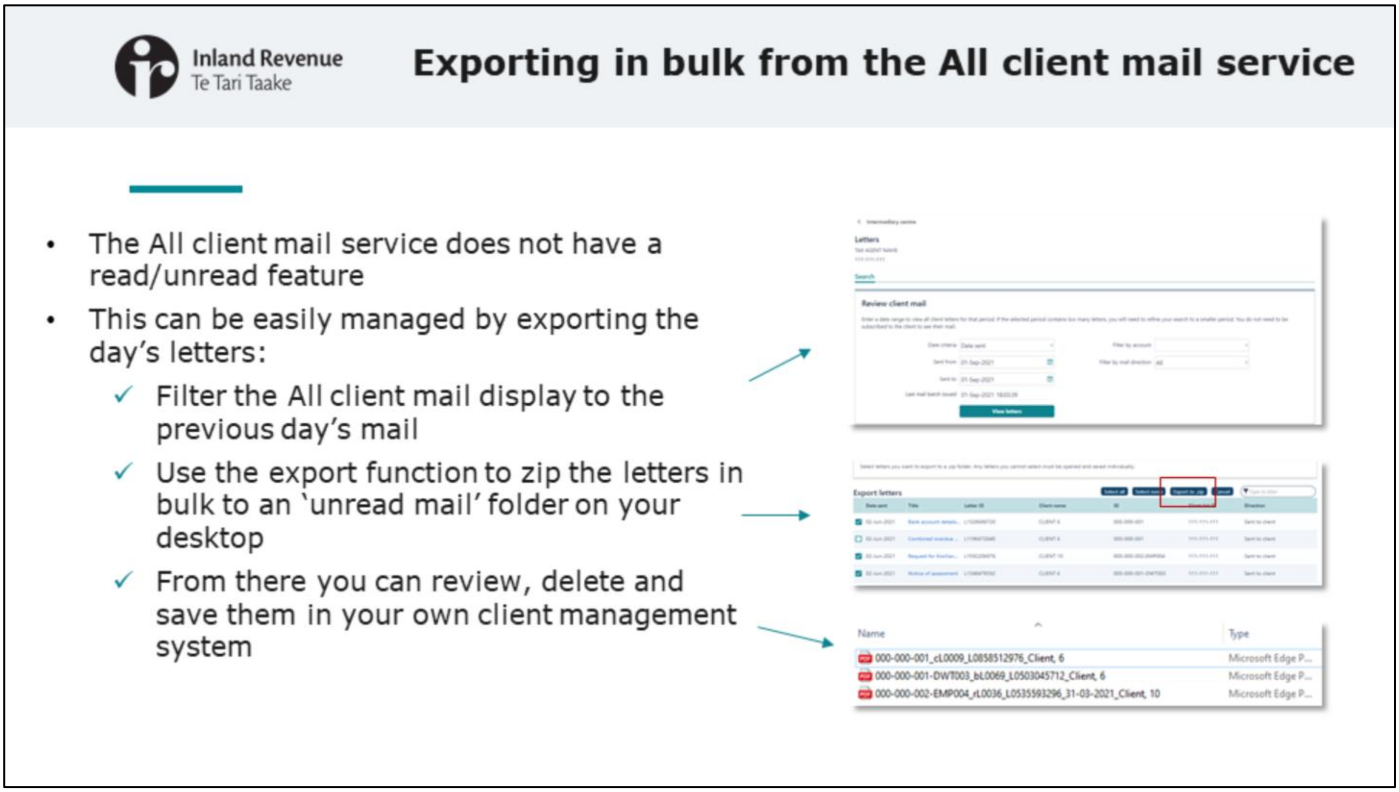
- The All client mail service (currently on the Tax preparer tab) will be in the Intermediary centre.
- To access the All client mail service, letters and PDF export function, you need to be at least a restricted administrator.
- This means that a user/restricted user will need their access upgraded if they are to use the full report.
- A new feature will be available for users to access the All client mail service to view which clients have letters.

- The All client mail service is currently on the Tax preparer tab. In the upgraded version of myIR, It will be in the Intermediary centre.
- To access the All client mail service, letters and PDF export function, you need to be at least a restricted administrator.
- This means that a user/restricted user will need their access upgraded if they are to use the full report.
- A new feature will be available for users to access the All client mail service to view which clients have letters. We’ll talk more about this later in this webinar.



When using the All client mail service you need to be working off the data from the day before.

- Most correspondence is generated once our nightly processes are complete.
- A date/time stamp shows you when the previous day's mail has been updated ready for you to look at or export.



- The All client mail service does not have a read/unread feature.
- However this can be easily managed by exporting the day's letters using the export function to zip the letters in bulk to an 'unread mail' folder on your desktop.
- From there you can review, delete and save them in your own client management system.

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PDFs from the All client mail service

- For exporting the letters in bulk, the PDF file path will now provide more information.

Previously
- IRD number or account ID
- unique letter ID

Now
- IRD number or account ID
- Letter type code
- Unique letter ID
- Period (if it exists)
- Client name.

- Agencies using automated processes to file these letters will need to incorporate the new format in their own client management system.
- Our website will provide a list of the letter codes and the letter title they relate to e.g. cL0018 is the 'bank account number required' letter.

- In response to feedback from tax intermediaries, for agencies who export the letters in bulk from the All client mail service, we have changed the file path in the PDFs to provide more information.
- Previously the file path name only included the IRD number or account ID and the unique letter ID. This will now show IRD number or account ID, letter type code, unique letter ID, period (if it exists) and the client name.
- If your agency uses an automated process to file these letters, you will need to make changes in your own client management system to incorporate the new format.
- So you can easily see what type of letter it is, we will provide a list on our website of the letter codes and the letter title they relate to e.g. cL0018 is the 'bank account number required' letter.
- (We have not included the full name of the letter type as these can be different lengths which is difficult for those who use automated scripts to read the file path and save it in their client management systems.)

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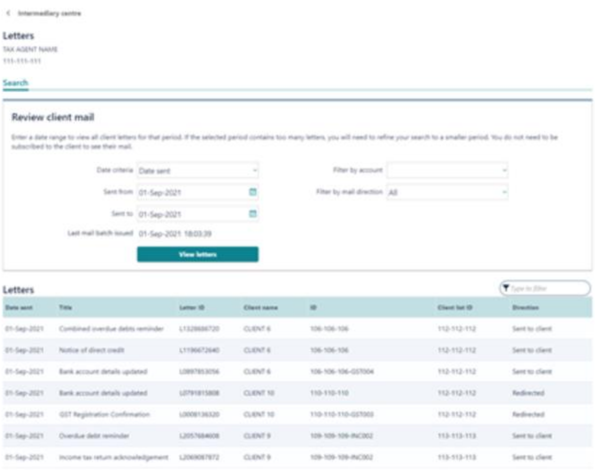
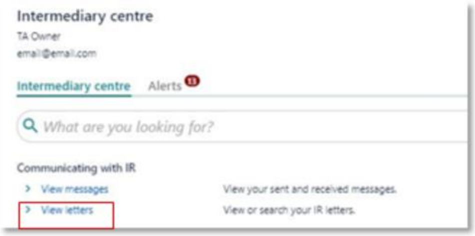
‘User’ access to the All client mail service



- Those with User access will have access to the All client mail service list, but not the letters or PDF export function.
- You will be able to see:
  - ✓ which clients have letters
  - ✓ the full daily list of all the client letters that require review
- To use the All client mail service:
  - ✓ Filter the All client mail display to the previous day’s mail
  - ✓ Copy and paste the list into Excel
  - ✓ There you can manually keep track of what you’ve actioned.
  - ✓ To access the client’s letters go into their account using the client’s name or IRD number search. You can then find their letters via the ‘View letters’ link or through the client’s alerts.

- As we’ve said, if you are a User, you will have access to the All client mail service list, but not the actual letters or PDF export function.
- You will be able to see which clients have letters and the full daily list of all the client letters that require review, similar to what you currently get in a daily email.
- Once you’ve filtered the All client mail display to the previous day’s mail, just copy and paste the list into Excel where you can manually keep track of what you’ve actioned.
- To access the client’s letters you will need to go into their account using the client’s name or IRD number search. From there you can find their letters via the ‘View letters’ link or through the client’s alerts. Even if you aren’t subscribed to them, you can still see a client’s alerts from within their account; this includes unread mail.

View letters



- In the Intermediary centre, under Communicating with IR, 'View letters' replaces the current Consolidated inbox
- This includes correspondence for all your subscribed clients (not just for one account), as well as any letters for your agency that you're authorised to access
- It will show letters from 1 April 2017 - the same as the customer view for all other users of myIR
- Letters from 8 February 2017 will be available for tax intermediaries in the All client mail list
- There will be no 'workspace' option in the drop down list as workspace won't be included the new version of myIR

Back in the Intermediary centre…

- In the upgraded version of myIR, under 'Communicating with IR' the 'View letters' link will replace the Consolidated inbox. It will show all correspondence for your subscribed clients (not just for one account), as well as any letters for your agency that you're authorised to access.
- 'View letters' will only show letters from 1 April 2017. This is for consistency as it is the same as the customer view for all other users of myIR.
- Letters from 8 February 2017 will be available for tax intermediaries in the All client mail list.
- There will be no 'workspace' option in the drop down list as workspace won't be included the new version of myIR.

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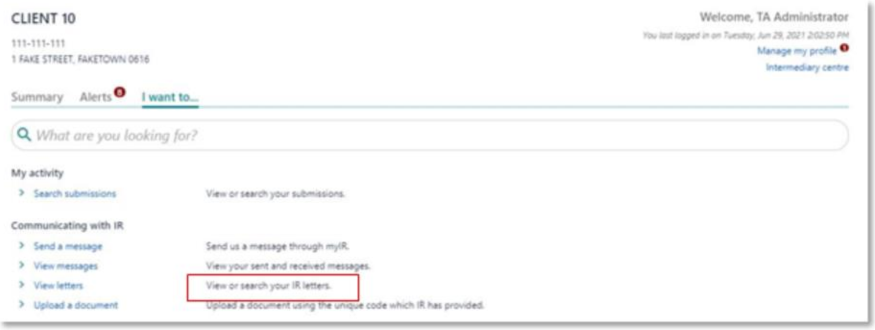
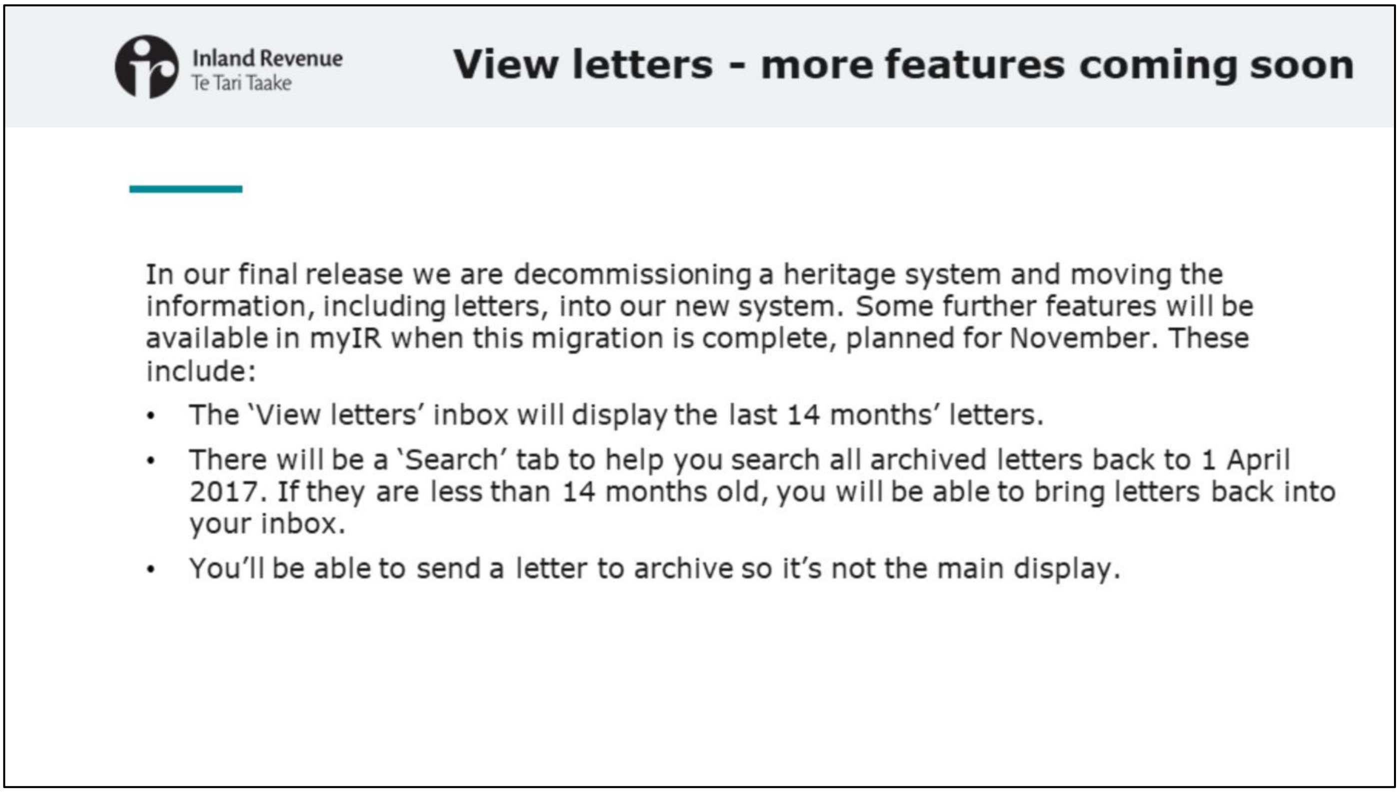
View letters



You will only be able to do an archive search for client mail back to April 2017.

You can request copies of earlier mail from us (e.g. via a web message)

- You will only be able to do an archive search for client mail (i.e. within a client account) back to April 2017.
- While it is unlikely that older mail, between 2010 and 1 April 2017 will be required, you can still request it from us.



In our final release we are decommissioning a heritage system and moving the information, including letters, into our new system. Some further features will be available in myIR when this migration is complete, planned for November. These include:

- The 'View letters' inbox will display the last 14 months' letters.
- There will be a 'Search' tab to help you search all archived letters back to 1 April 2017. If they are less than 14 months old, you will be able to bring letters back into your inbox.
- You can send a letter to archive so it's not on the main display, but you can still use the search feature. This reflects feedback from intermediaries wanting to 'delete' letters from their screens, this provides an ability to remove the letter from that logon's view.

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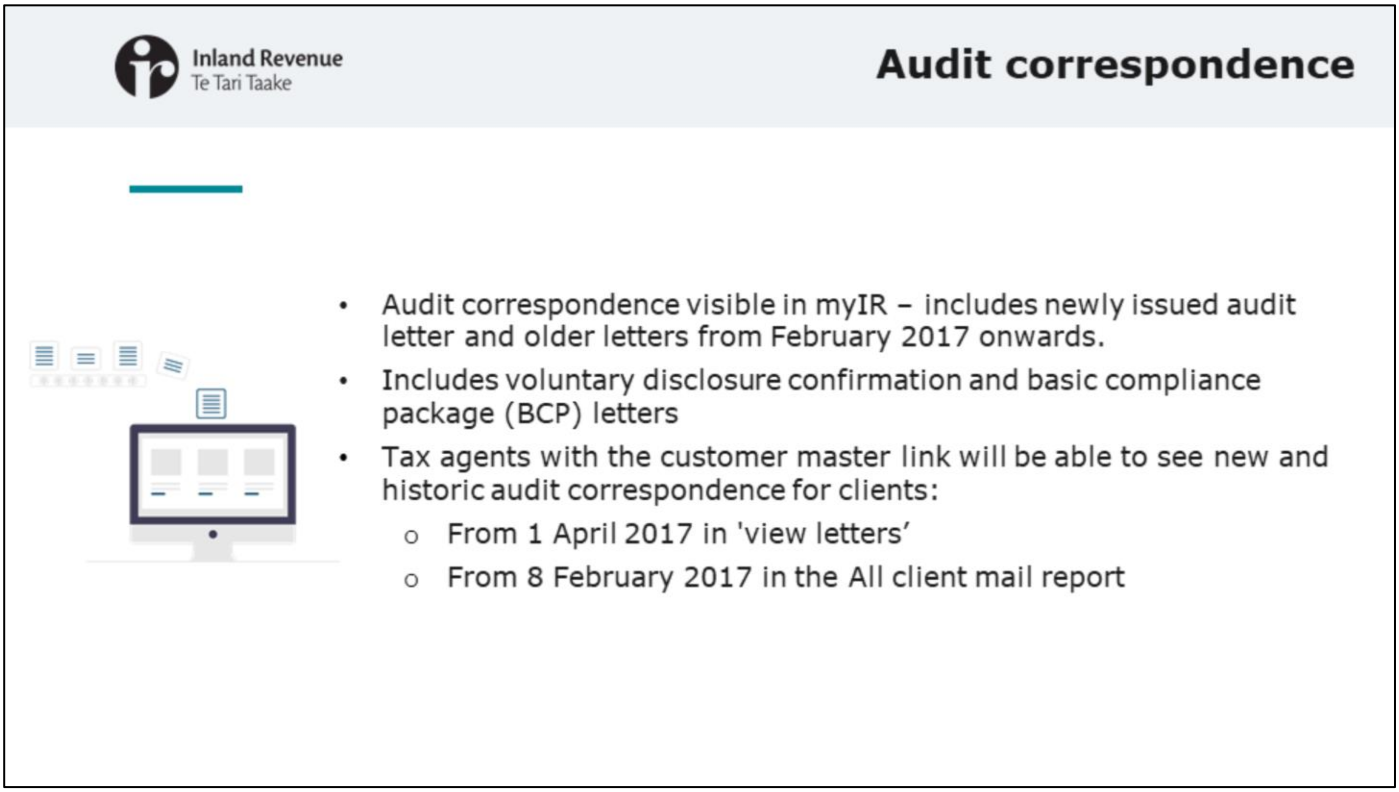
Old system mail

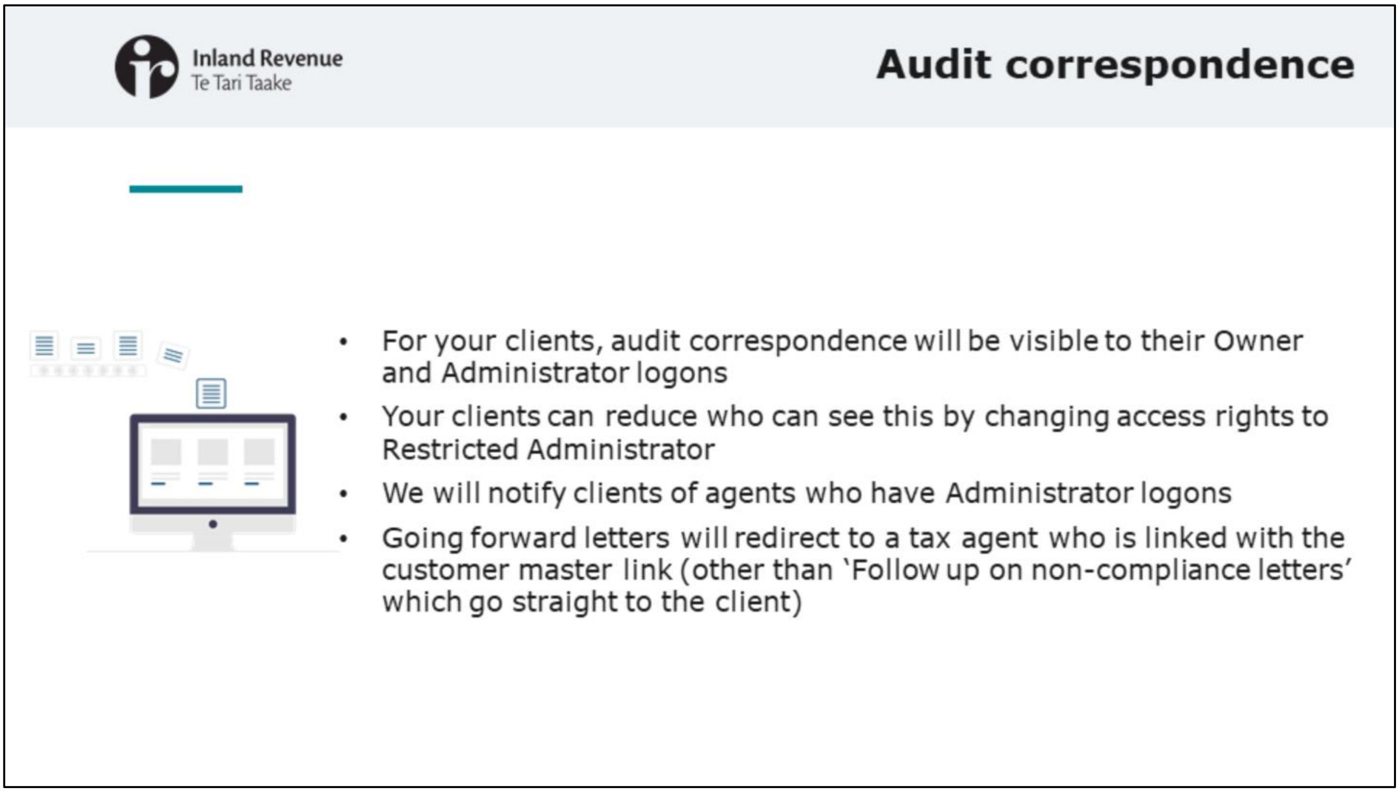
For old (heritage) system letters that are migrated into myIR:

- The All client mail report and View letters inbox will display as 'unknown' rather than 'sent to client' or 'redirect'
- You will need to open the letter and view the header block to check who it went to.

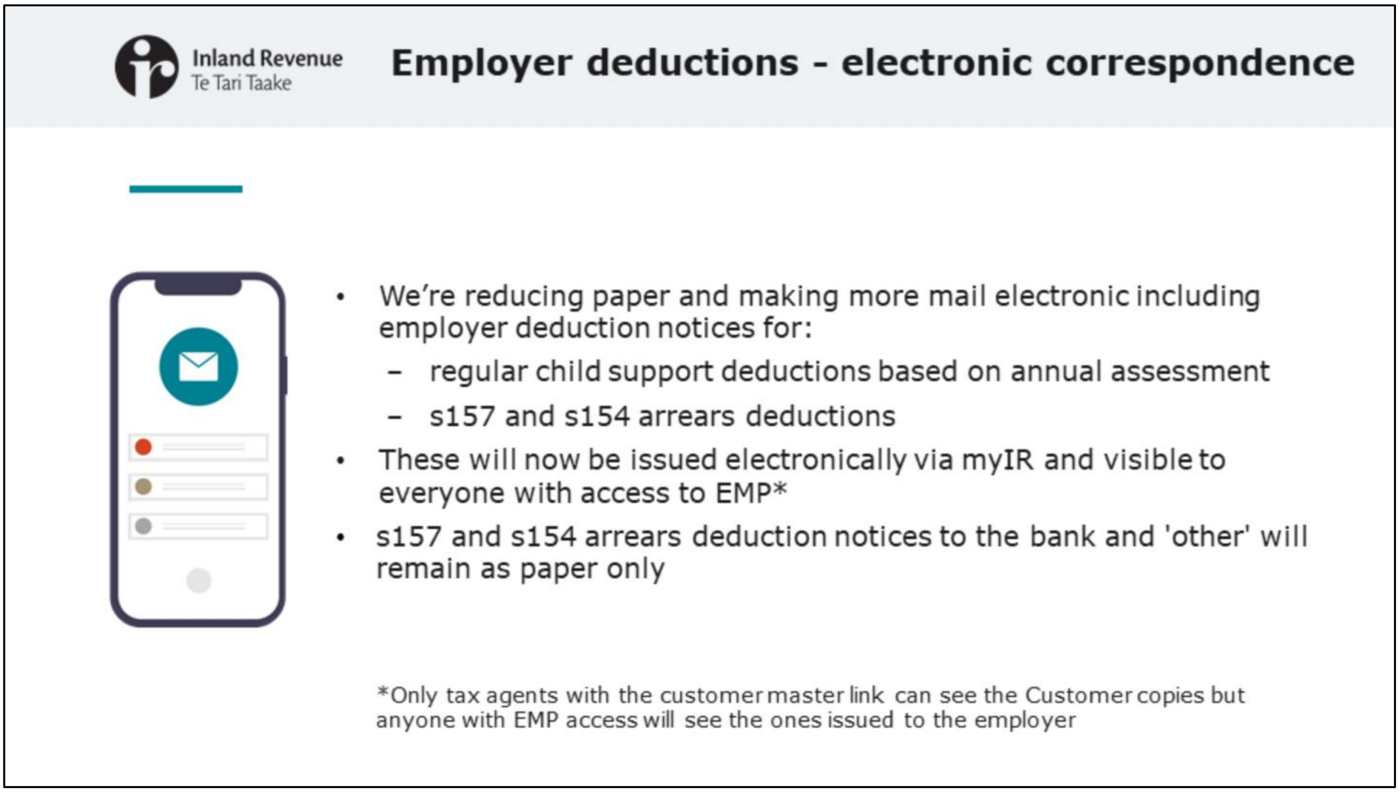
- For old (heritage) system letters that are migrated into myIR:
  - The All client mail report and View letters inbox will display as 'unknown' rather than 'sent to client' or 'redirect'
  - You will need to open the letter and view the header block to check who it went to.



- As well as newly issued audit letters, older audit letters from February 2017 (when our system gained the capability to send things electronically) will also be visible in myIR.
- These letters include voluntary disclosure confirmation and basic compliance package (BCP) letters.
- Tax agents with the customer master link will be able to see new and historic audit correspondence for clients:
    - From 1 April 2017 in 'view letters'
    - From 8 February 2017 in the All client mail report



- For your clients, audit correspondence will also be visible to their Owner and Administrator logons.
- They can reduce who can see this by changing access rights to Restricted Administrator.
- Clients of agents who have Administrator logons will need to be notified as historic audit correspondence will be published to myIR. We are contacting these customers to ensure they know about the change.
- Going forward these letters will now automatically redirect to a tax agent who is linked with the customer master link like other Customer level mail. If you don't have the customer master link, the letters will notify the client to log in and read them online. The only exception to this is the 'Follow up on non-compliance' letter which will always go to the client (but can still be viewed in myIR by tax agents with the customer master link).



- We’re reducing paper and making more mail electronic including employer deduction notices for:
    - Regular child support deductions based on annual assessment
    - s157 and s154 arrears deductions
- These will now be issued electronically via myIR and visible to everyone with access to EMP. Note that only tax agents with the customer master link can see the Customer copies, but anyone with EMP access will see the ones issued to the employer.
- s157 and s514 arrears deduction notices to the bank and 'other' will remain as paper only.

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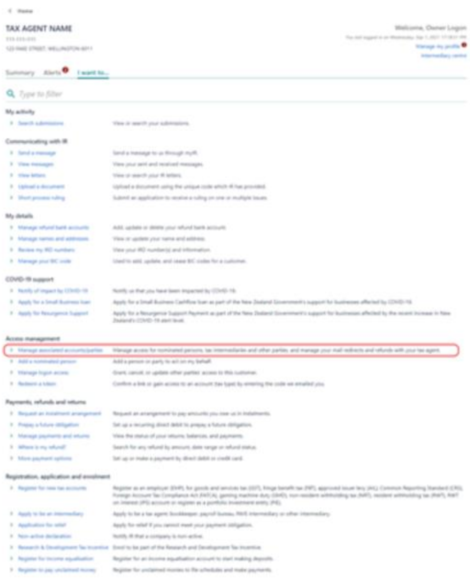
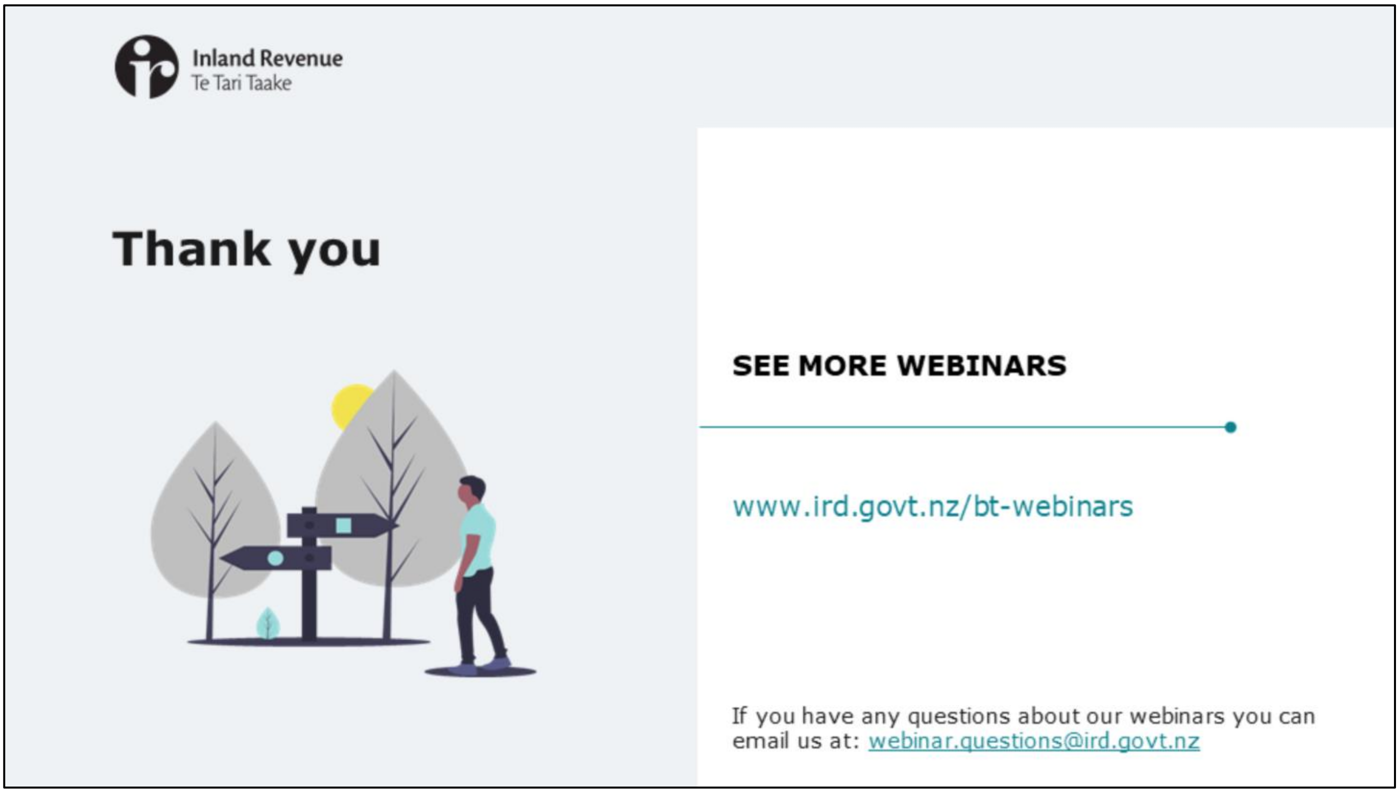
Child support – Nominated Persons



- A Nominated Person (NOP) for child support will now be able to access NCP/CPR correspondence in myIR.
- If you currently access a client that you have a NOP link for, you will need to claim it in myIR first in order to see the link when you go into the client.
- Claim it under the agency's IRD number>I want to>Manage associated accounts/parties. After claiming it the first time you will always have access, you just need to search for it.
- This is currently for over 300 CPR accounts and nearly 1,000 NCP accounts with tax agents linked as NOPs.
- As well as the correspondence, you'll be able to see everything else that's available to your clients within the CPR/NCP accounts.

- Anyone who is a Nominated Person (NOP) for child support will now be able to access child support NCP/CPR correspondence in myIR.
- If you currently access a client that you have a NOP link for, you will need to claim it in myIR first in order to see the link when you go into the client.
- You can claim it under the agency's own IRD number>I want to> Manage associated accounts/parties. After claiming it the first time you can always access it, you just need to search for it.
- This is currently for over 300 CPR accounts and nearly 1,000 NCP accounts with tax agents linked as NOPs.
- As well as the correspondence, you'll be able to see everything else that's available to your clients within the CPR/NCP accounts.



- This webinar provides an overview of how of how you will view and manage client subscriptions and mail in the upgraded version of myIR.
- The main changes in myIR will be around the look, feel and navigation and you can find out more about this in other webinars and on our website.
- Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.