SUMMARY:
Subscriptions and correspondence in myIR

For: tax intermediaries

This summary accompanies a webinar:

Subscriptions and correspondence in the new version of myIR

It is aimed at tax intermediaries

Subscriptions

Like now:

you can subscribe to clients that you need to access regularly, and

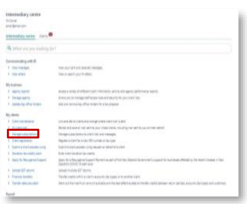
you need to be subscribed to clients to get their mail in the daily email.

In addition:

In the intermediary centre, the subscription functionality has been expanded – as well as client mail, they will also include alerts

You can also easily add subscribed clients to your favourites

Manage subscriptions



Add and manage subscriptions in the Intermediary centre under:

My clients>Manage subscriptions.

You won't be able to 'subscribe all' or 'unsubscribe all'.

Subscription numbers

Each *logon* is limited to 1,250 subscriptions. 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

Converting subscriptions for 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.

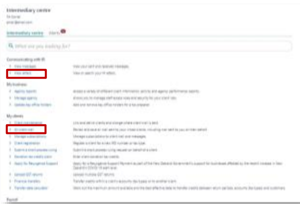
If you have **more than 1,250** subscribed accounts:

only the 1,000 most recently accessed clients, who you have taken action on, will be brought across as subscribed clients at go-live.

Viewing correspondence

There are three places where you can view correspondence:

1. Intermediary centre – View letters (replaces the Correspondence tab)
2. Intermediary centre – All client mail
3. In a customer – I want to… View letters



Intermediary centre

Customer account

Inland Revenue
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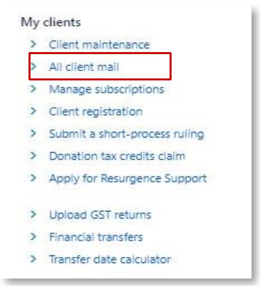


All client mail service

Use the All client mail service to manage mail:

- It includes all your clients, not just those you are subscribed to – so you won’t miss mail
- PDFs can be exported in bulk – saving time
- The report contains additional information like whether it was redirected to the agent or went to the client themselves

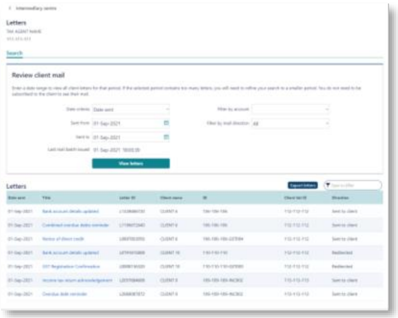
Accessing All client mail service

The All client mail service is 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

A user/restricted user will need their access upgraded if they are to use the full report

Users will now be able to access the All client mail service to view which clients have letters



Using All client mail service

Use the data from the day before

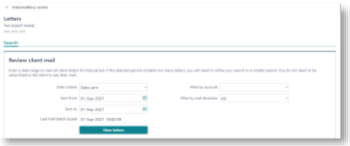
A date/time stamp shows you when the previous day’s mail has been updated ready for you to look at or export.

Exporting in bulk from the All client mail service

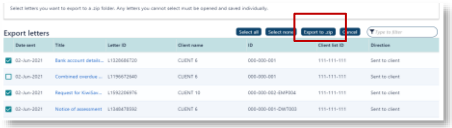
The All client mail service does not have a read/unread feature

This can be easily managed by exporting the day’s letters.

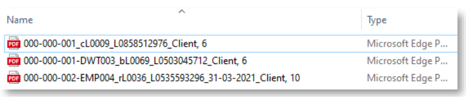
1. Filter to the previous day’s mail



2. Use the export function to export letters in bulk to an ‘unread mail’ folder on your desktop



3. Review, delete and save them in your own client management system



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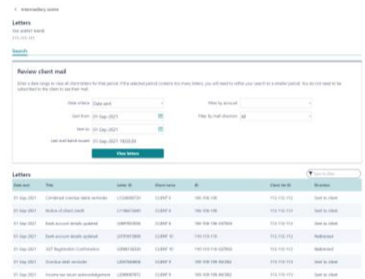
User access to All client mail service

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
- Manually keep track of what you’ve actioned.

To access the client’s letters go into their account – you’ll find their letters via the ‘View letters’ link or through the client’s alerts.

Viewing letters in the Intermediary centre

‘View letters’ includes correspondence for all your subscribed clients as well as any letters for your agency that you’re authorised to access

It will show letters from 1 April 2017; tax intermediaries will find letters from 8 February 2017 in the All client mail list

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)

Other changes include:

Audit correspondence:

- visible in myIR – includes newly issued audit letter and older letters from February 2017 onwards
- for your clients, audit correspondence will be visible to their Owner and Administrator logons - they can reduce who can see this by changing access rights to Restricted Administrator

More mail electronic including employer deduction notices for:

- regular child support deductions based on annual assessment
- s157 and s154 arrears deductions (these notices to the bank and 'other' will remain as paper only)

A Nominated Person (NOP) for child support will now be able to access NCP/CPR correspondence in myIR.

MORE INFORMATION

What’s changing in 2021

ird.govt.nz/business-transformation-2021

Business Transformation webinars

www.ird.govt.nz/bt-webinars

Webinar.questions@ird.govt.nz