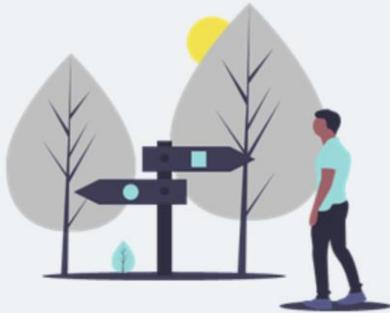

Navigating the new version of myIR

For businesses, employers, individuals and families

IR Business Transformation

30 JUNE 2021

Purpose



www.ird.govt.nz/bt-webinars
webinar.questions@ird.govt.nz

NAVIGATING THE NEW VERSION OF MYIR

FOR

- Businesses
- Employers
- Individuals and families

TOPICS

- Logging on
- Accessing an account
- Account panels
- Tabs
- Task steps
- Filtering and searching

Welcome to this webinar about navigating the new version of myIR coming in October.

This presentation provides a quick introduction to this change.

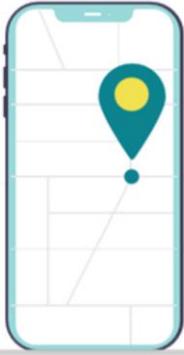
It may be useful for businesses, employers, individuals and families.

If you are a tax intermediary, we recommend you watch the webinar that introduces the navigation for intermediaries. You'll find it at www.ird.govt.nz/bt-webinars

Please note that the content of this webinar is correct as at 30 June 2021 but may be subject to change.

If you have any questions arising from this webinar please send them to webinar.questions@ird.govt.nz.

If you have specific questions about your account, please send them via myIR.



- Navigation – one of the main things that’s changing when we upgrade myIR
- What you do in myIR will be the same
- Cleaner, simpler navigation
- Fewer clicks

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In this webinar we will look at some of the main changes to the navigation in myIR – this is one of the things that will change the most.

It’s important to keep in mind that what you do in myIR will be the same – the information will just be organised in a cleaner, simpler way.

The new version of myIR also brings more information forward so there’s fewer clicks to get to where you want to go.

BLOGGS BUSINESS LTD
111-111-111
1 FAKE STREET, FAKETOWN 6011

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 8:42:11 AM
[Manage my profile](#)

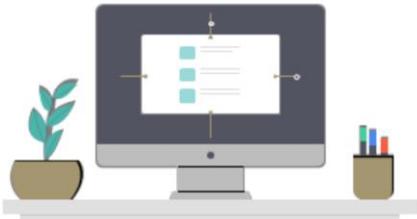
[Summary](#) [Alerts](#) [I want to...](#)

GST BLOGGS BUSINESS LTD 111-111-111-GST003 Alerts	Total balance: \$698.38 <small>Due now: \$698.38</small>	Make a payment Returns and transactions More...
Income tax BLOGGS BUSINESS LTD 111-111-111-INC002 Alerts	Total balance: \$50.00 <small>Due now: \$50.00</small>	Make a payment Returns and transactions Income summary More...
Payroll BLOGGS BUSINESS LTD 111-111-111-EMP004	30-Jun-2021	Express file transfer File or upload a return
	Total balance: \$0.00 <small>Due now: \$0.00</small>	Employees Make a payment Returns and transactions More...

Here's a reminder of the new look.

You'll notice there are panels for different account types. You'll hear about these panels a lot as they are a key part of the new design.

In this presentation we'll use this example of an employer (with a Payroll account). The customer account for an individual will have the relevant account types for that customer – the look, feel and navigation is the same.



- Logon access and security is the same as now
- Like now, web logon access will vary depending on whether it is for your personal account, work account, several entities etc.
- What you see when you log on will depend on whether that web logon has access to one or multiple customer accounts.

Logging on to myIR will be the same as now - access and security will be the same.

Like now, web logon access will vary and you may have more than one. For example:

- you may have a logon that accesses just your own account
- you'll have a different logon if you access the myIR account of the organisation you work for
- you might have a logon that accesses a number of different entities
- or for a single entity with several branches attached to it.

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

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

GST BLOGGS BUSINESS LTD 111-111-111-GST003 Alerts	Total balance: \$698.38 Due now: \$698.38	Make a payment Returns and transactions More...
Income tax BLOGGS BUSINESS LTD 111-111-111-INC002 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-EMP004	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...

Example for an employer

If your logon accesses just one customer account (like your personal account, or an individual organisation), the first screen will show you all the accounts you have (such as income tax, GST, Working for families).

Logon details

Customer
customer@test.com

Welcome, Customer

You last logged in on Friday, Oct 1, 2021 9:41:04 AM

[Manage my profile](#)

Select a customer:

All

Type to filter

Company

111-111-111

▲ 4 outstanding alerts

Customer, First

111-111-111

▲ 3 outstanding alerts

Customer, Second

111-111-111

Customer, Third

111-111-111

If you are using a logon that gives access to multiple customers, when you log in you'll see a list of the accounts you have access to, like the example shown here.

From here you can choose a customer account.

People who access multiple customers include:

- Tax intermediaries
- Nominated persons
- Executive office holders (eg Directors) with multiple entities

Once you've clicked on a customer you'll see the panels for each account you are authorised to access for that customer.

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111-111-111
1 FAKE STREET, FAKETOWN 6011

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 8:42:13 AM
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Summary Alerts I want to...

GST BLOGGS BUSINESS LTD 111-111-111-GS7003 Alerts	Total balance: \$698.38 Due now: \$698.38	Make a payment Returns and transactions More...
Income tax BLOGGS BUSINESS LTD 111-111-111-INC002 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-EMP004	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...

Left: Account type, customer information and alerts

Middle: Total balance and any payments due now.

Right: Links to tasks for that account. The 'More' link takes you to the full list of tasks.

Let's take a closer look at the account panels.

Firstly, they are listed alphabetically by account type.

The account type is indicated on the left of the panel along with the customer identifying information (like the IRD number) and alerts.

In the centre is information about the account including the total balance and any payments due now.

On the right are links to common actions – like 'returns and transactions' and 'make a payment'. These links are specific to that panel. So 'make a payment' on an income tax panel will take you to the payment options screen for paying income tax; and the 'more' link will take you to all the tasks for income tax. The links from the GST tab will be for GST-related information and tasks. And so on. This makes it easy to take action on the account you're interested in. What you do when you access the task (eg file a return) is the same as today.

So unlike now, you won't click into an account – you'll click straight into the task for that account. The information has been brought up to this landing page level which means fewer clicks and less navigating.

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1 FAKE STREET, AHEATOWN 6011

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

GST

BLOGGS BUSINESS LTD

111-111-111-027002

[Alerts](#)

Total balance: \$698.38

Due next: \$498.38

- [Make a payment](#)
- [Returns and transactions](#)
- [More...](#)

Income tax

BLOGGS BUSINESS LTD

111-111-111-040002

[Alerts](#)

Total balance: \$50.00

Due next: \$50.00

- [Make a payment](#)
- [Returns and transactions](#)
- [Income summary](#)
- [More...](#)

Payroll

BLOGGS BUSINESS LTD

111-111-111-049004

30-Jun-2021

- [Express file transfer](#)
- [File or upload a return](#)

Total balance: \$0.00

Due next: \$0.00

- [Employees](#)
- [Make a payment](#)
- [Returns and transactions](#)
- [More...](#)

Make a payment

Income tax

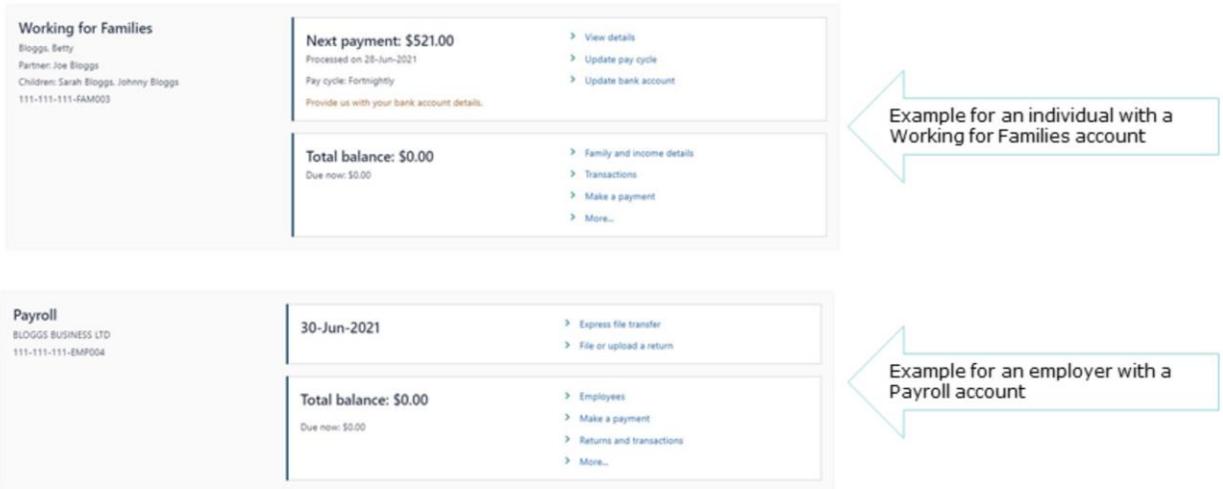
111-111-111-040002

Make a payment

Payment options

- [Set up a direct debit authority](#) A direct debit authority needs to be agreed to in order to set up direct debit payments from your bank account
- [Make a variable direct debit payment](#) Make a one-off payment from your bank account
- [Make a credit card payment](#) Make a payment using your Visa or Mastercard credit or debit card
- [Prepay a future obligation](#) Set up a recurring direct debit to prepay a future obligation

Here's an example of what you'll see if you click into the 'Make a payment' link on the Income tax account panel. This is the same for if you were in an individual's customer account.



The image shows two examples of sub-panels within an Inland Revenue account interface. The top example is for a 'Working for Families' account, and the bottom example is for a 'Payroll' account. Each example consists of a main panel with account details and a sub-panel with specific account information and actions.

Working for Families
Bloggs, Betty
Partner: Joe Bloggs
Children: Sarah Bloggs, Johnny Bloggs
111-111-111-FAM003

Next payment: \$521.00
Processed on 28-Jun-2021
Pay cycle: Fortnightly
Provide us with your bank account details.

View details
Update pay cycle
Update bank account

Total balance: \$0.00
Due now: \$0.00

Family and income details
Transactions
Make a payment
More...

Example for an individual with a Working for Families account

Payroll
BLOGGS BUSINESS LTD
111-111-111-EMP004

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...

Example for an employer with a Payroll account

Within a panel there are sub-panels. The sub-panel called 'account' is at the bottom of the panel and shows the account information. The Account sub-panel will always be there.

Other sub-panels will appear at certain times and will provide information about a specific thing that's coming up.

What they tell you will differ between accounts. In these examples we can see:

- an individual's Working for Families account panel with a sub-panel saying when the next payment is due and how much it will be. This doesn't need to be actioned, it is for information only. In this example it also asks for their bank account details for this account.
- an employer's Payroll account panel with a sub-panel saying when the next payroll dates are. Again, this is for information and doesn't need to be actioned at this time.

BLOGGS BUSINESS LTD
111-111-111
1 FAKE STREET, FAKETOWN 6011

Welcome, Joe Bloggs
You last logged in on Monday, May 17, 2021 @ 42:13 AM
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Summary Alerts 0 I want to...

GST BLOGGS BUSINESS LTD 111-111-111-GST003 Alerts 0	Total balance: \$698.38 Due now: \$698.38	Make a payment Returns and transactions More...
Income tax BLOGGS BUSINESS LTD 111-111-111-INC002 Alerts 0	Total balance: \$50.00 Due now: \$50.00	Make a payment Returns and transactions Income summary More...
Payroll BLOGGS BUSINESS LTD 111-111-111-EMP004	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...

At the top of the customer screen, you'll see three tabs above the panels: Summary, Alerts and I want to:

- The summary page shows the list of the accounts, as shown here.
- The Alerts tab shows any outstanding or upcoming tasks you need to action. We'll talk more about alerts in another webinar.
- The 'I want to' tab gives a list of tasks available for the customer as a whole.

BUILDING HOUSES COMPANY
015 251 2511
123 NOWHERE ROAD, SOMEWHERE, CTY 7122

Welcome, Director
You last signed in on Tuesday, May 25, 2017 2:02:22 PM
[Manage my profile](#)

Summary Alerts **I want to**

What are you looking for?

My activity

- Search submissions Search submissions you've made

Communicating with IR

- Send a message Send a message
- View messages View messages sent between you and the agency
- View letters View letters sent by the agency
- Upload a document Upload a document using the unique code which IR has provided
- Short access ruling Submit an application to receive a ruling on one or multiple issues

My details

- Manage refund bank accounts Add or delete your bank account number for refunds
- Manage names and addresses View or manage names and addresses
- Review my IRD numbers View your IRD number(s) and information
- Manage your BC code Used to add, update, and cease BC codes for a customer

COVID-19 support

- Notify of impact by COVID-19 Notify us that you have been impacted by COVID-19
- Apply for a Small Business Cashflow loan Apply for a Small Business Cashflow loan as part of the New Zealand Government's support for businesses affected by COVID-19
- Reurgence Support Payment Application Apply for a Reurgence Support Payment loan as part of the New Zealand Government's support for businesses affected by COVID-19

Access management

- 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
- Manage login access Manage others' access to this customer
- Rebegan a token Confirm a link or gain access to an account (via token) by entering the code we emailed you

Payments, refunds and returns

- Request an instalment arrangement Request an arrangement to pay amounts you owe us in instalments
- Prepay a future obligation Set up a recurring direct debit to prepay a future obligation
- Manage payments and returns View the status of your returns, balances, and payments
- Where is my refund? Search for any refund by amount, date range or refund status
- View payment options View payment options

Here's how the 'I want to' page looks for a business.

From this tab you can do the same things as now - like managing access, viewing correspondence, managing payments and returns - but the tasks have been categorised more to make things easier to find.

The 'I want to' screen for individuals looks the same and includes all the tasks for individuals.



And speaking of tasks, once you are performing a task – like filing a GST return – at the top of the page you'll see 'breadcrumbs' of the steps in the task. This helps you to know where you are in the process.

Logon details

Customer
customer@test.com

Select a customer:

All

Company

111-111-111

▲ 4 outstanding alerts

Customer, First

111-111-111

▲ 3 outstanding alerts

Customer, Second

111-111-111

Customer, Third

111-111-111

Welcome, Customer

You last logged in on Friday, Oct 1, 2021 9:41:04 AM

[Manage my profile](#)

You'll also be able to use simple filtering and searching fields to find what you're looking for.

On some screens (like the screen for choosing a customer), there is a **filter** bar.

Note that this will only filter the things on that page (for example, the customer name), it is not a site-wide filter.

BUILDING HOUSES COMPANY

015 251 2111
123 HOWHERE ROAD, SOMEWHERE, CITY 7122

Welcome, Director

You last logged in on Tuesday, May 25, 2021 2:02:22 PM
[Manage my profile](#)

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

My activity

[Search submissions](#) Search submissions you've made

Communicating with IR

- [Send a message](#) Send a message
- [View messages](#) View messages sent between you and the agency
- [View letters](#) View letters sent by the agency
- [Upload a document](#) Upload a document using the unique code which IR has provided
- [Short access ruling](#) Submit an application to receive a ruling on one or multiple issues

My details

- [Manage refund bank accounts](#) Add or delete your bank account number for refunds
- [Manage names and addresses](#) View or manage names and addresses
- [Review my IRD numbers](#) View your IRD number(s) and information
- [Manage your BC code](#) Used to add, update, and cancel BC codes for a customer

COVID-19 support

- [Notify of impact by COVID-19](#) Notify us that you have been impacted by COVID-19
- [Apply for a Small Business Cashflow loan](#) Apply for a Small Business Cashflow loan as part of the New Zealand Government's support for businesses affected by COVID-19
- [Reurgence Support Payment Application](#) Apply for a Reurgence Support Payment loan as part of the New Zealand Government's support for businesses affected by COVID-19

Access management

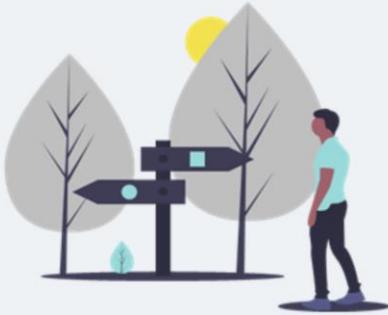
- [Manage associated accounts/entities](#) Manage access for nominated persons, tax intermediaries and other parties, and manage your mail redirects and refunds with your tax agent
- [Manage login access](#) Manage others' access to this customer
- [Revoke a token](#) Confirm a link or gain access to an account (via SSO) by entering the code we emailed you

Payments, refunds and returns

- [Request an instalment arrangement](#) Request an arrangement to pay amounts you owe us in instalments
- [Prepay a future obligation](#) Set up a recurring direct debit to prepay a future obligation
- [Manage payments and returns](#) View the status of your returns, balances, and payments
- [Where is my refund?](#) Search for any refund by amount, date range or refund status
- [View payment options](#)  View payment options

On other screens (like the 'I want to' page), you'll be able to **search** for key words (like 'letters' or 'access').

Thank you



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This webinar has given an overview of how you will find your way around the new version of myIR. It's just a quick look to help build familiarity with the new environment.

Remember, if you have any questions about our webinars, please send them to webinar.questions@ird.govt.nz.

We appreciate that there will be a period of adjustment as you become familiar with the new layout. You will hear a lot more about what's changing as we get closer to the upgrade in October.