Navigating the new version of myIR

For businesses, employers, individuals and families

IR Business Transformation

30 JUNE 2021

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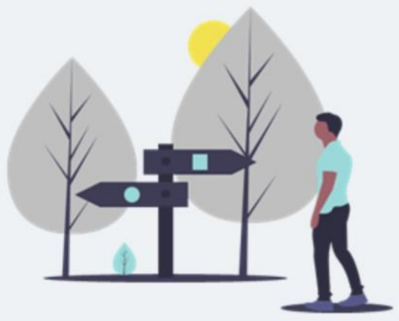
Te Tari Taake

Purpose



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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.

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Introduction

- 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.

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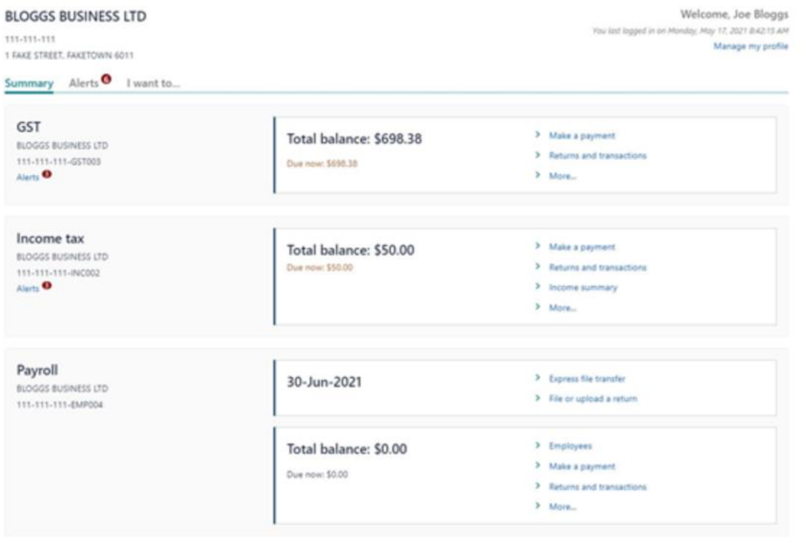
Introduction



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.

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Logging on

- 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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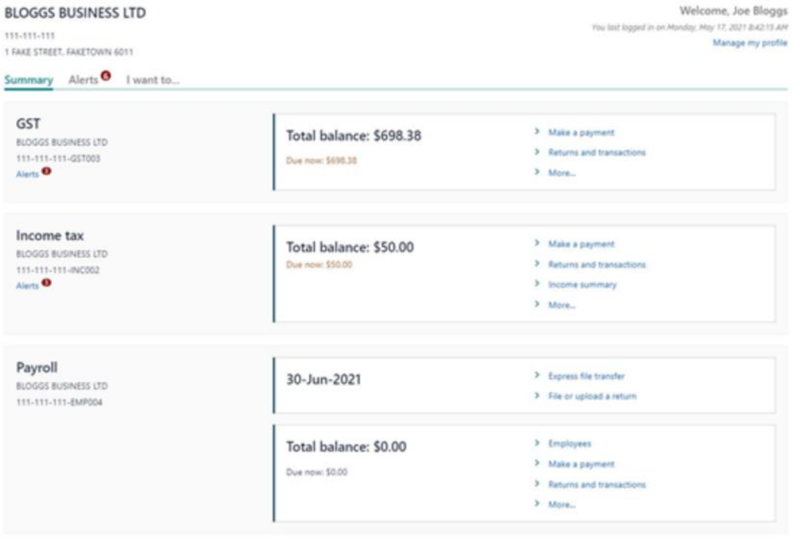
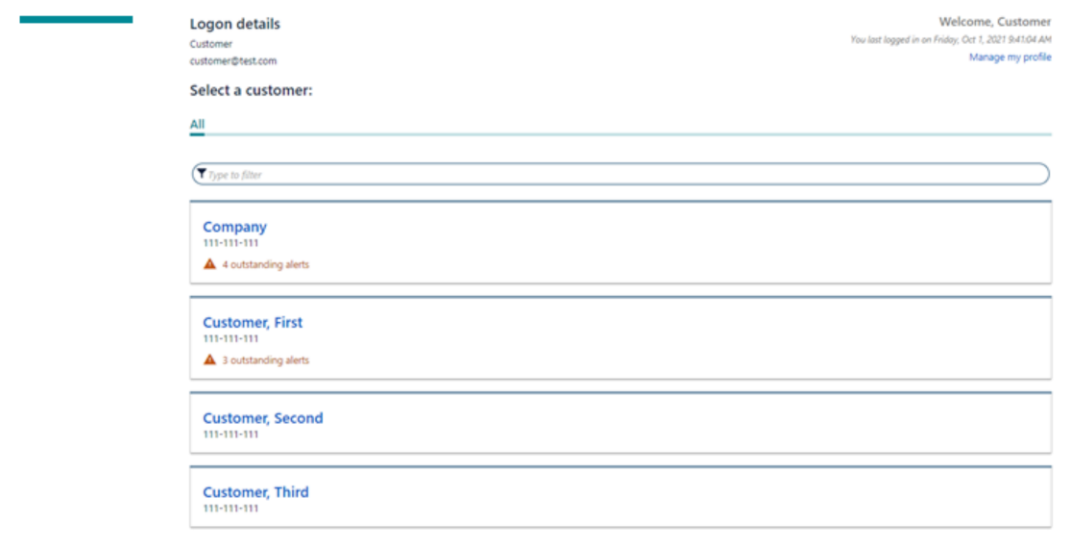
Accessing an account



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).

Accessing an account



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 chose 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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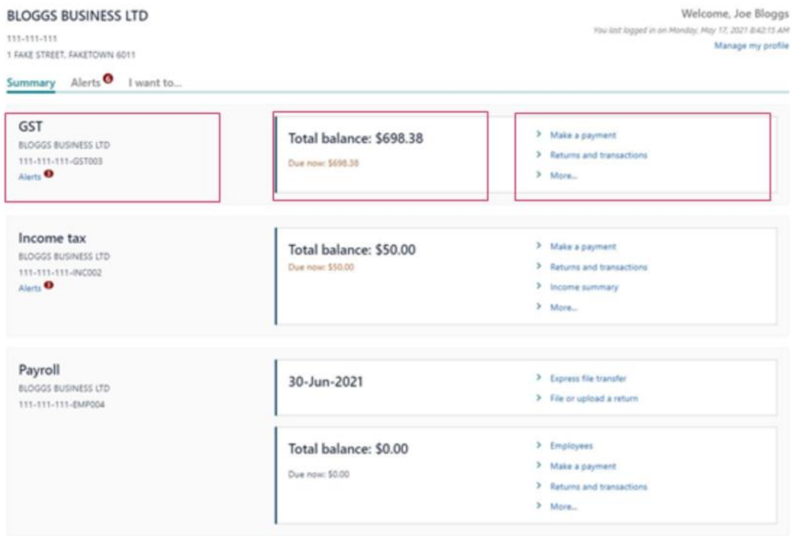
Account panels

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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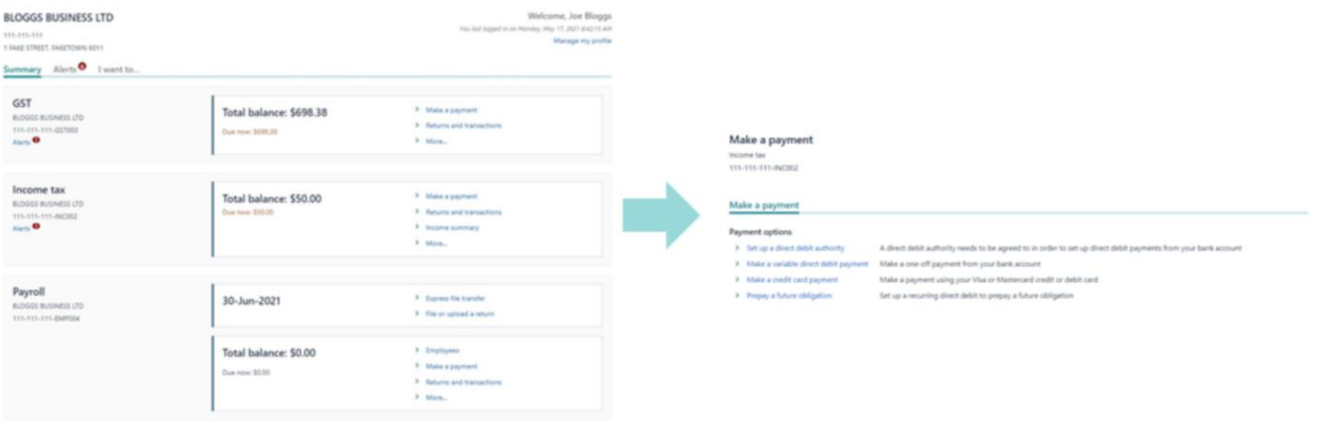
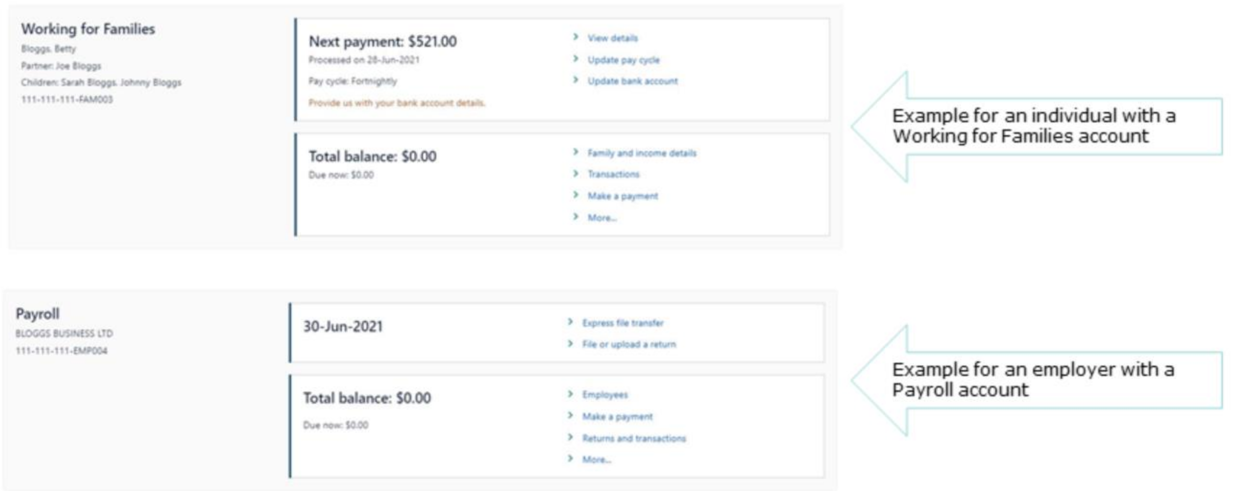
Task links



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.

Sub-panels



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.

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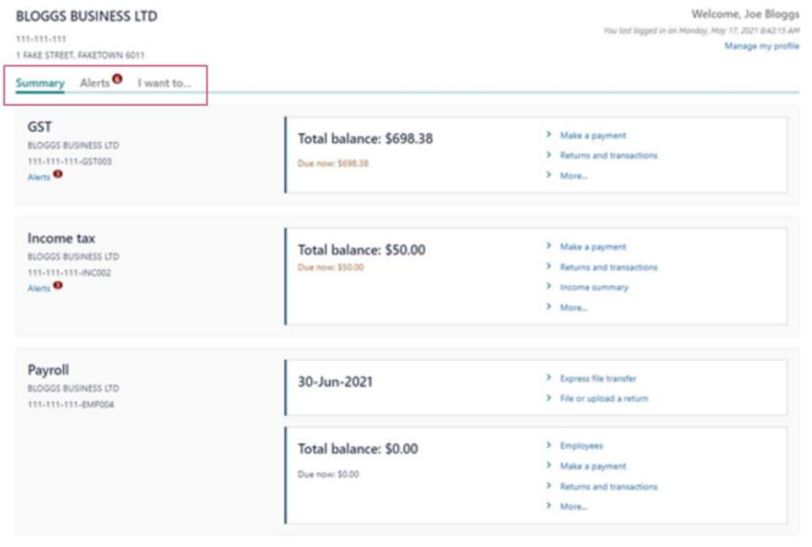
Tabs



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.

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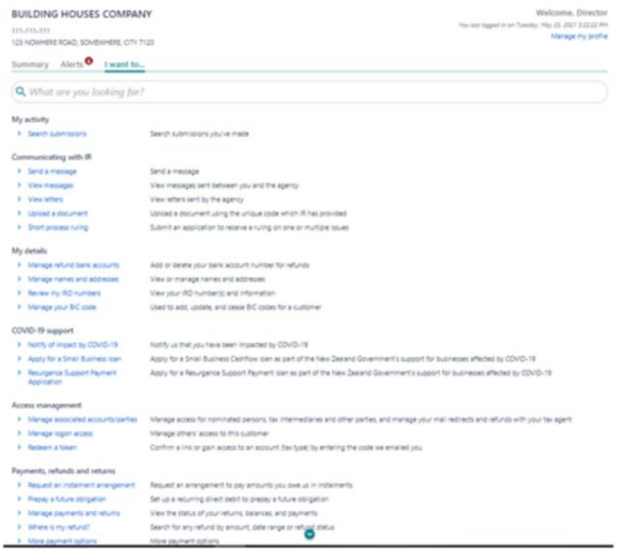
'I want to ' tab



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.

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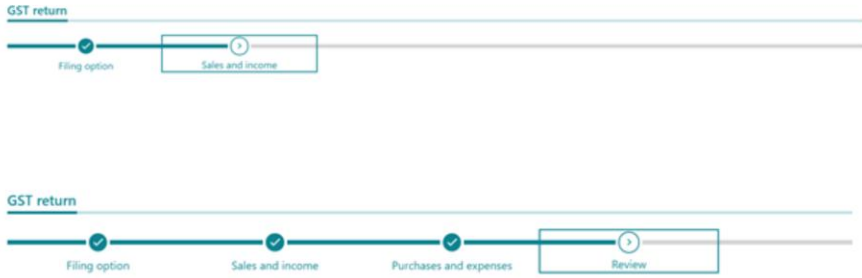
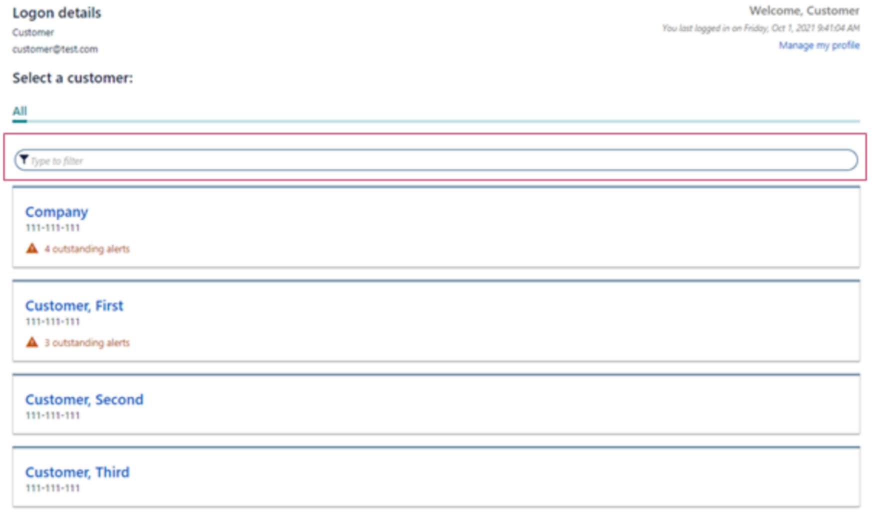
Task steps



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.

Finding things - filtering



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.

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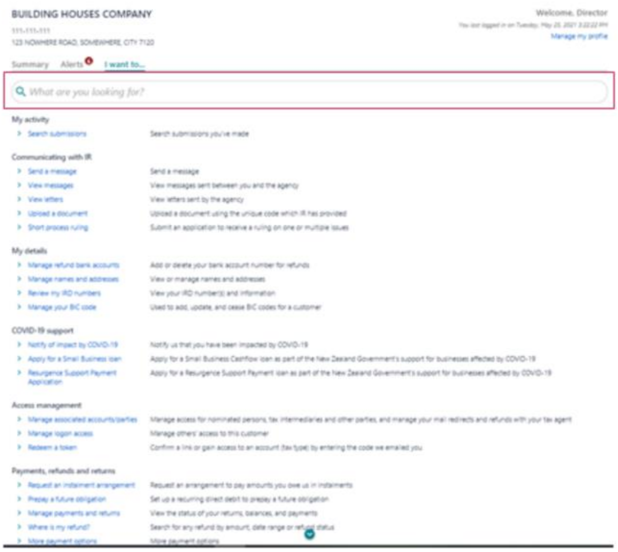
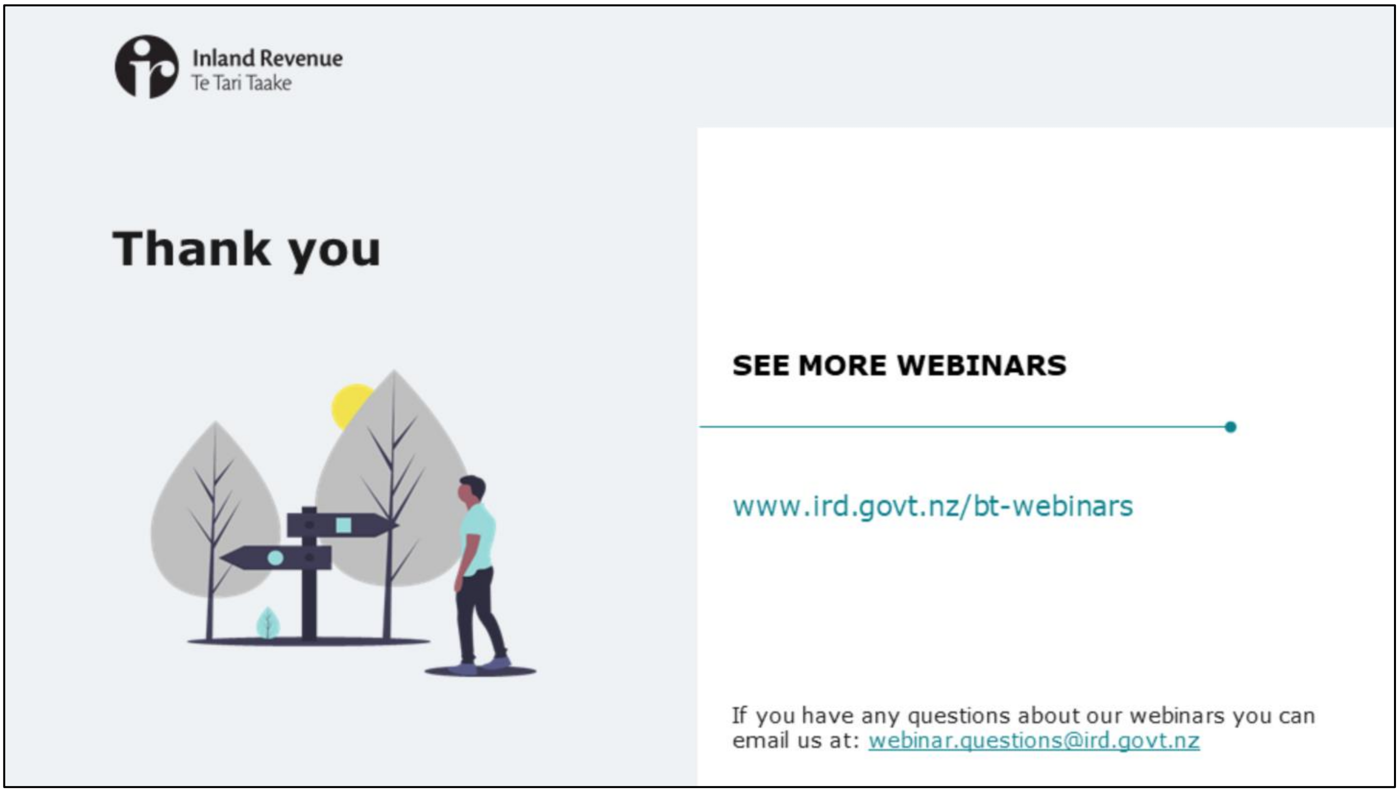
Finding things - searching



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



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.