KS48
July 2025

myIR guide for KiwiSaver scheme providers

Inland Revenue
Te Tari Taake

KiwiSaver
Poua he Oranga

myIR for KiwiSaver scheme providers

Introduction

This guide is for KiwiSaver scheme providers. It explains how to use myIR to manage KiwiSaver accounts and share information with Inland Revenue (IR).

Becoming a KiwiSaver scheme provider

To learn more about becoming a KiwiSaver provider visit **Becoming a KiwiSaver scheme provider**

Need help?

If you need assistance, contact your scheme's relationship manager.

Contents

Accessing myIR for your KiwiSaver scheme

Your myIR access is based on how your scheme is set up.

If you want a quick way to manage access, the following links can help:

Manage additional logons in myIR

Add additional web logon access for a myIR account

Manage account access for an existing logon in myIR

Get access to an account as a nominated person

Key points:

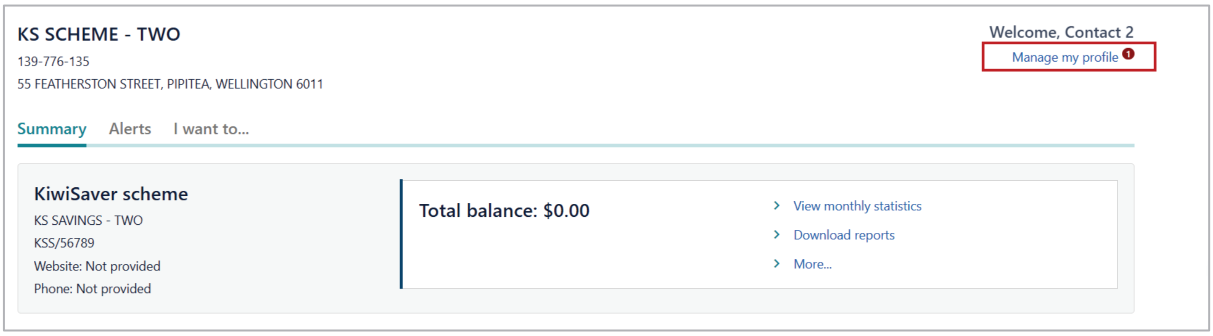
- An account owner (such as a director, trustee, or executive office holder) must grant initial access
- The owner can delegate access to others by assigning administrator or restricted administrator roles
- Each person must have their own logon – logons cannot be shared
- For any issues, please contact your scheme's relationship manager.

Update access regularly

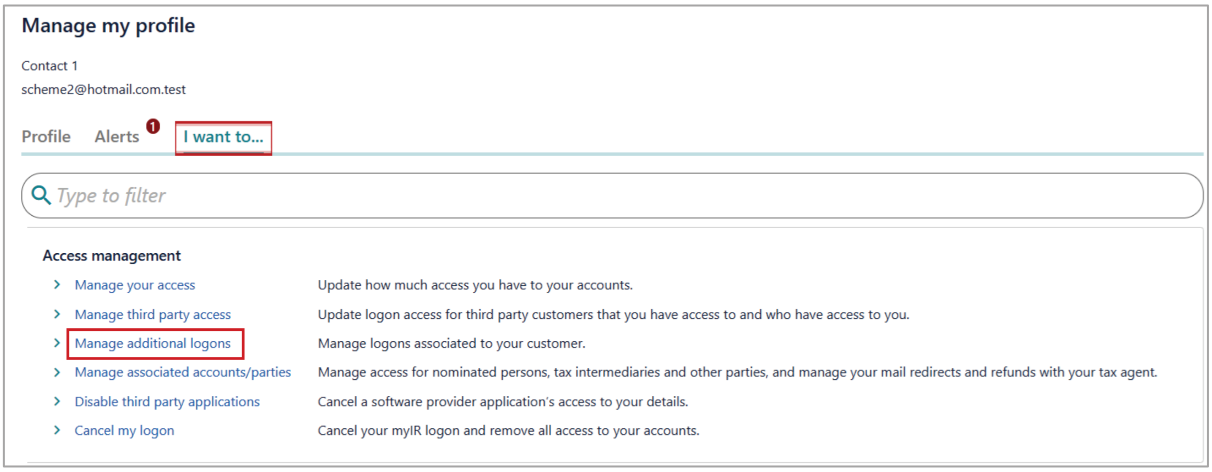
Make sure the right people have access to your scheme in myIR. If you do not, former employees or external administrators may still have access to your scheme's details.

How to view and manage logons

1. Select **Manage my profile**



2. Select **I want to…> manage additional logons**

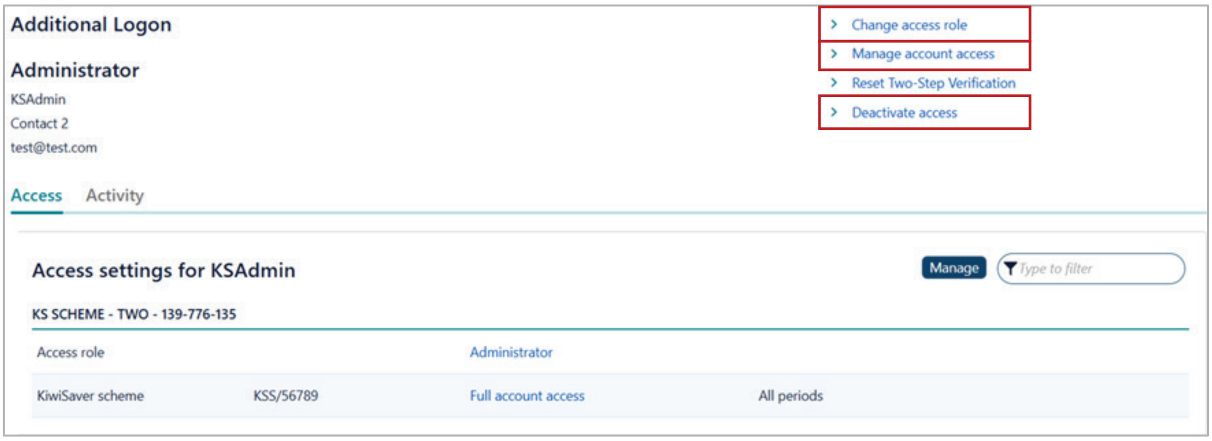


Add and manage logons

You can view and manage all your additional logons in myIR. To create a new logon for someone to access myIR on behalf of you or your business set **Allow new logons?** to **Yes** and select **Add new logon** to enter their details and choose their access role.

If you want your administrators to be able to create new logons for others, make sure **Allow new logons?** is set to **Yes**

To **add, edit,** or **remove logons**



Access roles and permissions

What you can see and do in myIR depends on your role and the permissions assigned to you.

Access roles

- **Owner -** Full account access to all accounts
- **Administrator -** Access to accounts the owner allows. Can create logons and view customer letters
- **Restricted administrator -** Same as administrators, but **cannot** view customer letters
- **Users -** Access only to specific accounts granted by the owner or administrator. Can view account notices and letters, but **not** customer letters
- **Restricted users -** Same as user, but can only submit account level requests.

Account permissions:

- **Full account access -** Can do everything, including updating refund bank accounts and requesting credit transfers
- **File -** Can view all information, send messages, file returns and disclosures
- **Make payments -** Can view all, send messages and make payments
- **Read only -** Can view account balances, transactions, account-specific notices, and letters. Can send messages but **cannot** make changes.

Two-step verification and passkeys

All logons must use two-step verification for added security. This means you'll need more than just a user ID and password. To learn more, go to Two-step verification for myIR

Passkeys let you log in to myIR using your fingerprint, face, or screen lock (like a PIN), without needing to enter a verification code.

Provider contacts

We use your contact list in myIR to know who to send messages to. It's important to keep this list up to date.

When adding a contact, include:

- name
- role
- web logon and email address.

If someone has multiple roles, add them separately for each one. You can have more than 1 contact for each role.

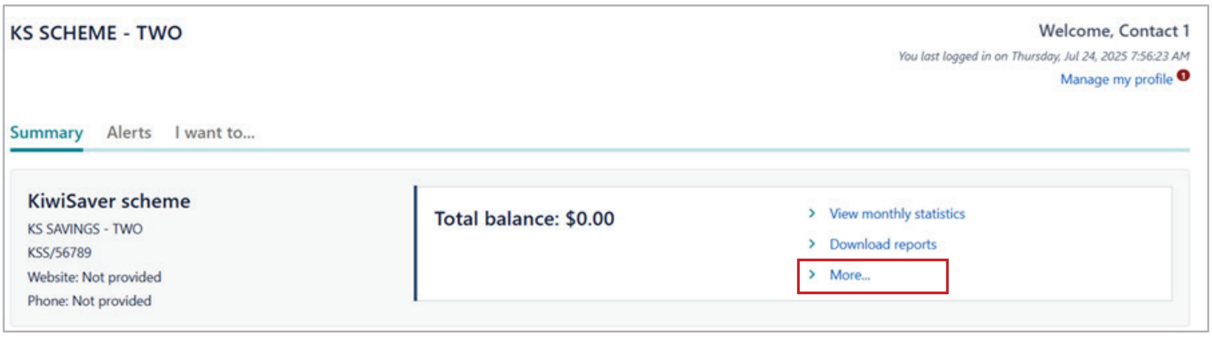
Contact roles

- Admin- members - General member queries
- B2B/B2B errors - B2B queries or issues
- Enrolments - Member and employer chosen scheme enrolments
- Government contributions - GVC queries or issues
- Payment and reconciliation totals - Payment reconciliations queries
- Overdue refund requests - Overdue refund follow ups
- Reporting notifications - Quarterly certificate alerts
- Technical - Technical queries
- Transfers out - Member scheme transfers.

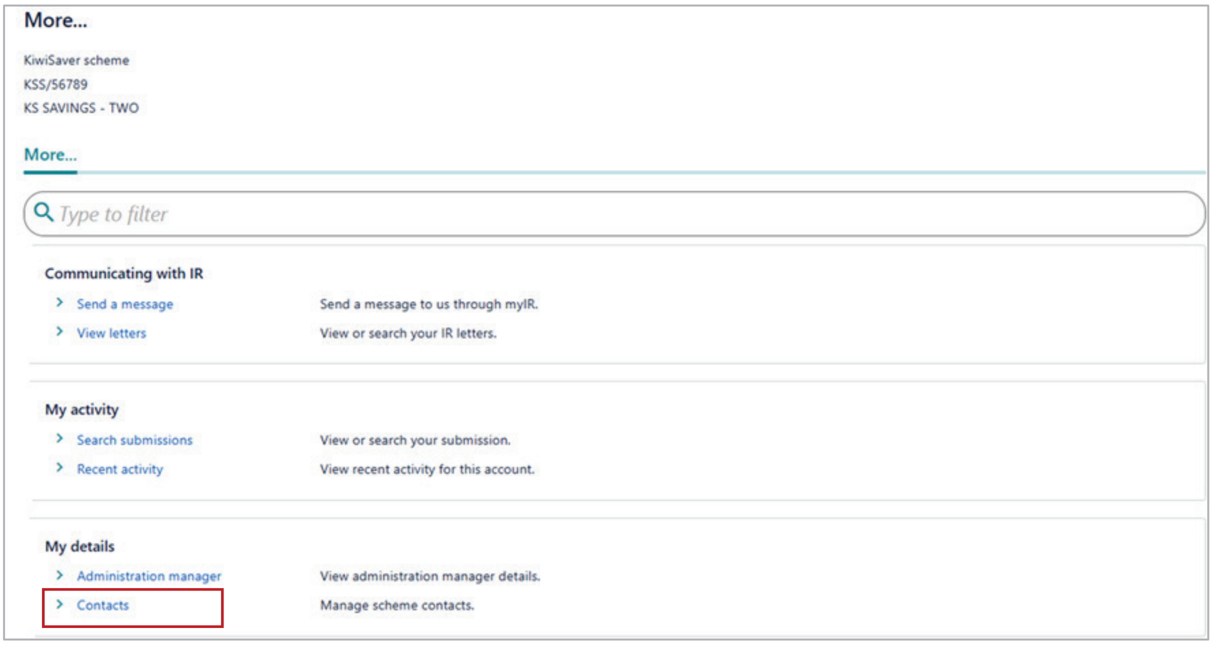
Anyone with myIR user except for read only users can view and update the contact list.

How to update or view the contact list

1. Go to the KiwiSaver scheme you want to update
2. In the KiwiSaver scheme tile, select **More...**



3. select **Contacts**



Add, edit, or **remove** any contacts as needed

Understanding your myIR inbox

Each logon has its own inbox – there is no shared inbox in myIR. You can only see messages that were sent or received using your own logon.

All logons except for restricted users, can run a report to see all messages sent under the scheme.

Messages remain in your inbox for up to12 months unless you archive them. Older messages (more than 12 months) can be found using the **Search** tab.

To make sure messages reach the right person, keep your provider contacts list up to date.

How to send a message in myIR

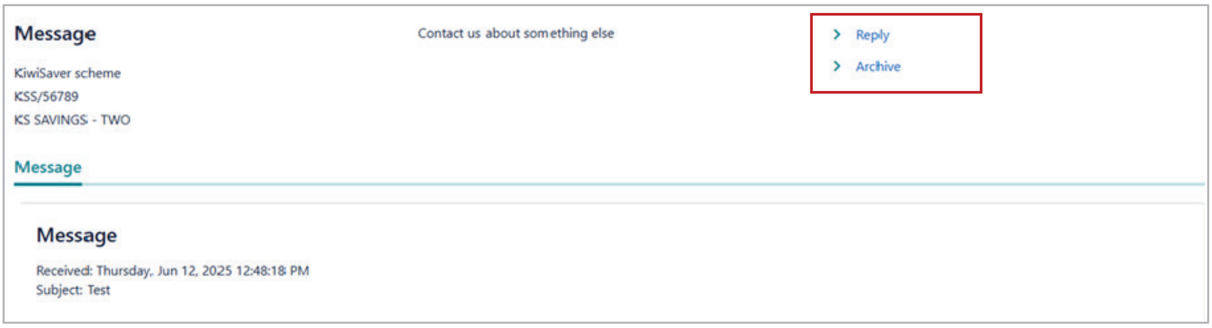
- myIR is secure - there's no need to encrypt documents or hide IRD numbers.
- Use a clear subject line - include the member's IRD number, name, and a keyword for your query. For example, Transfer query 11-111-111 John Doe. This helps filter the messages if required to pin-point sent or received messages.
- Attach files if needed - you can upload documents or spreadsheets up to 5120 kb.
- Send 1 message per member – do not combine multiple member queries in a single message or send bulk queries.

Message category and replies

Select the most relevant category for your query. This helps direct it to the right team so they can respond within the expected time for that type of request.

You can reply to messages from IR to provide more information, answer questions, or confirm actions. Please **do not** reply just to acknowledge receipt of the message.

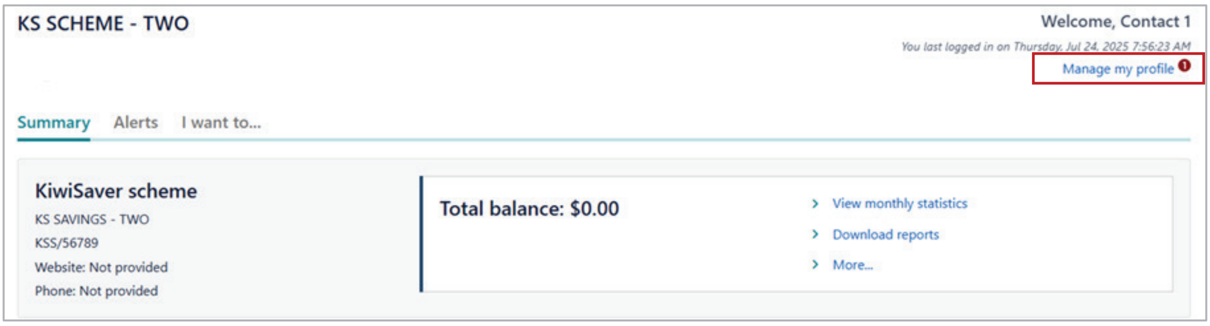
For more details, go to **How to send a message in myIR**



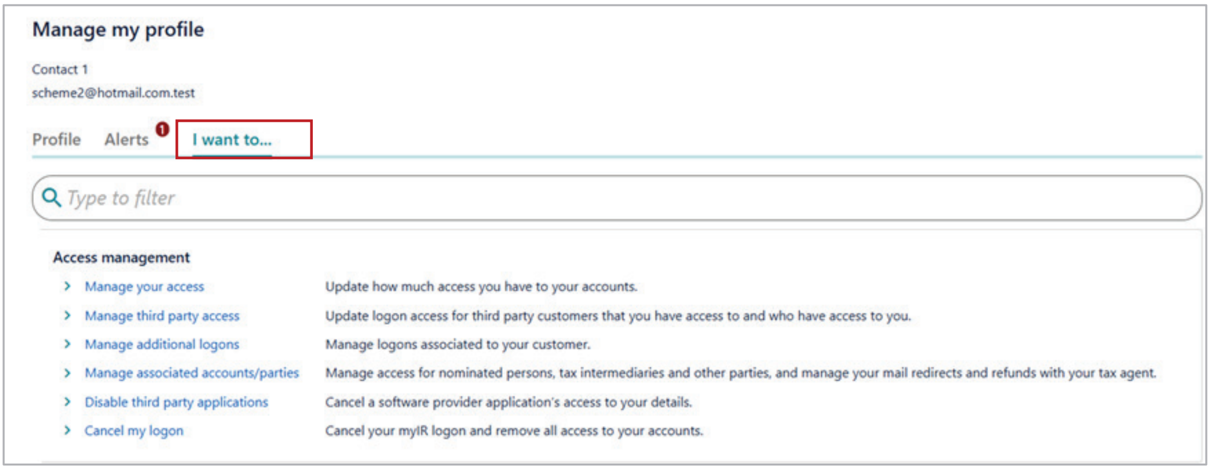
Viewing messages in myIR

To view all messages sent to your logon including across multiple schemes:

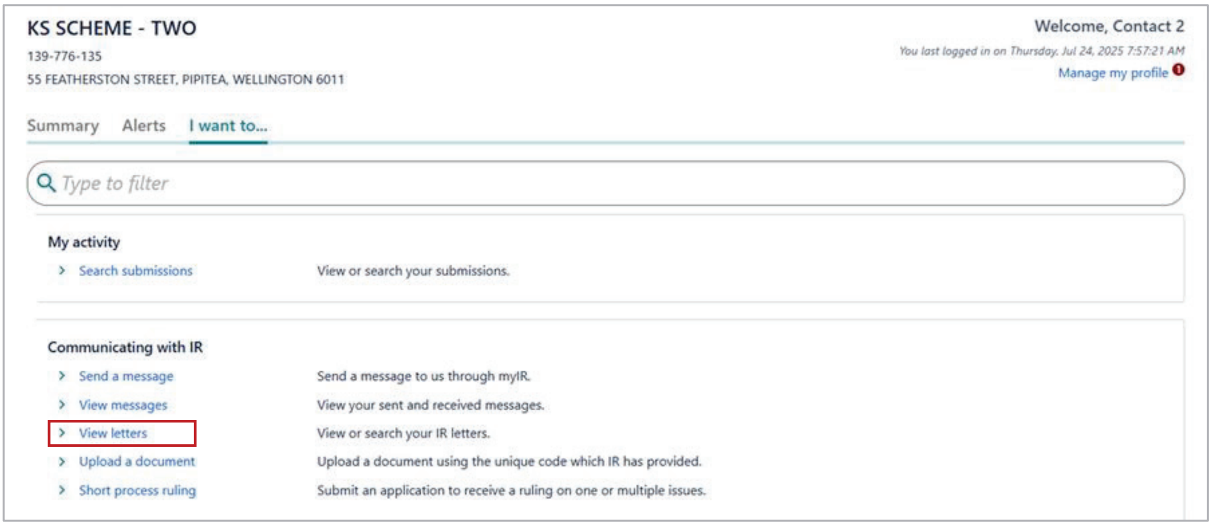
1. Select **Manage my profile**



2. Select **I want to...**



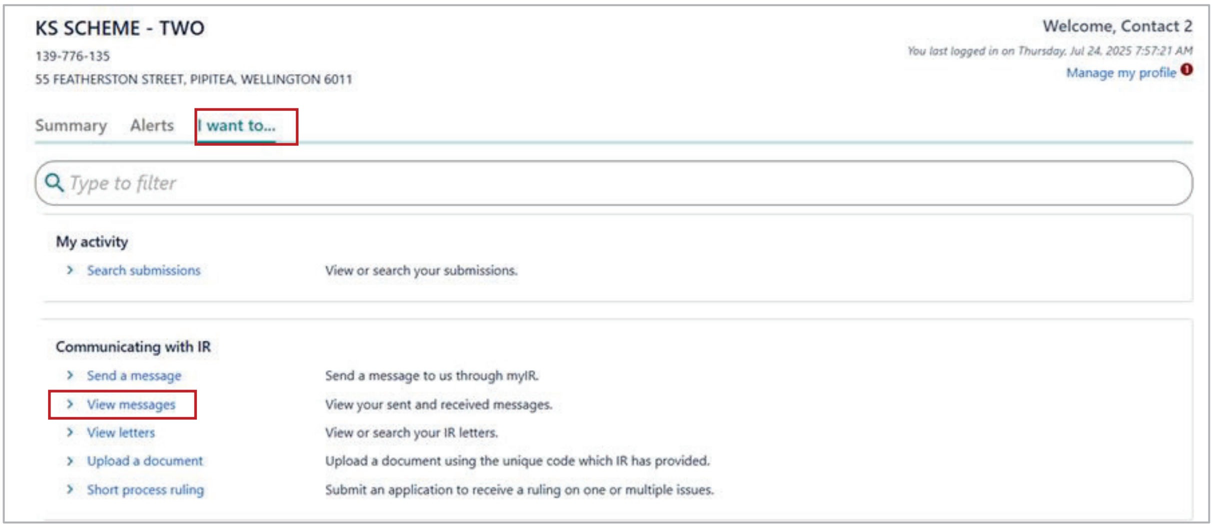
3. Select **View letters**



To view messages for a specific scheme:

Access the KiwiSaver scheme you want to view

Select **I want to... > View messages**



Filtering and archiving messages

- You can sort messages by the column headers, or filter using search terms
- The search function does **not** search the content within the messages
- To archive a message, click the **Archive** link next to it
- Archived messages remain available in the **Archived** section and can be restored to your inbox at any time.

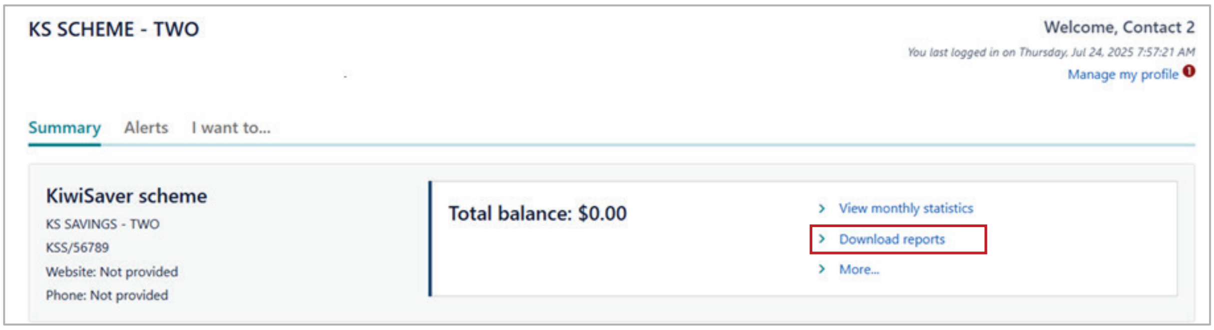
Reports in myIR

The following reports are available to help manage your KiwiSaver scheme. All reports (except the KiwiSaver Message report) can be exported to Excel and are available to all myIR access levels.

- Employer chosen scheme report - List of employers who your scheme is set as their active employer chosen schemes
- Members without GVC report - Annual list of members (aged 16-65) who did not have a government contribution claim filed. Once you file a GVC claim, the member does not get removed immediately
- Incomplete transfers report - List of incomplete transfers. Check this report regularly to view required actions
- Monthly scheme statistics - View monthly scheme statistics for your scheme
- Overdue refund request report - List of your overdue refund requests. Review frequently to follow up as needed
- Estate details report - List of executor or administrator details for deceased members (if they've been provided to IR)
- KiwiSaver message report - Review and export all messages sent about your KiwiSaver scheme (only available for intermediary logons and not available to restricted users).

How to view reports

1. Access the KiwiSaver scheme you want to view
2. In scheme tile, select **Download reports**



3. Choose the report you want to view

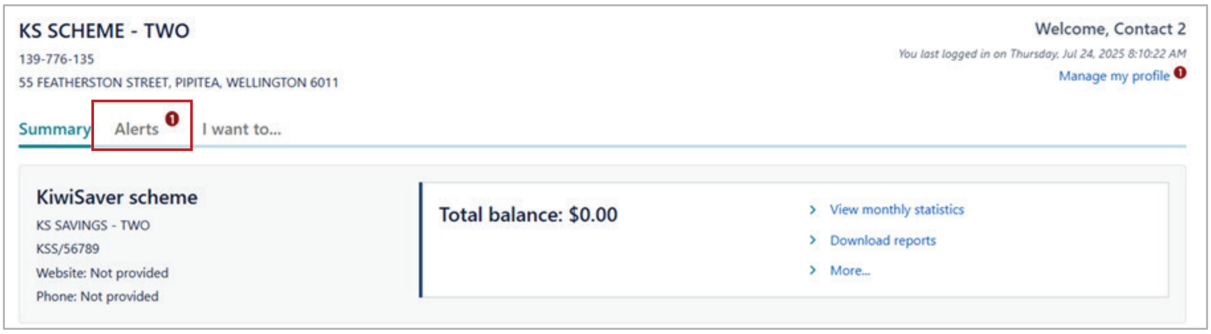
Alerts

Alerts let you know when there is something to view or action in myIR.

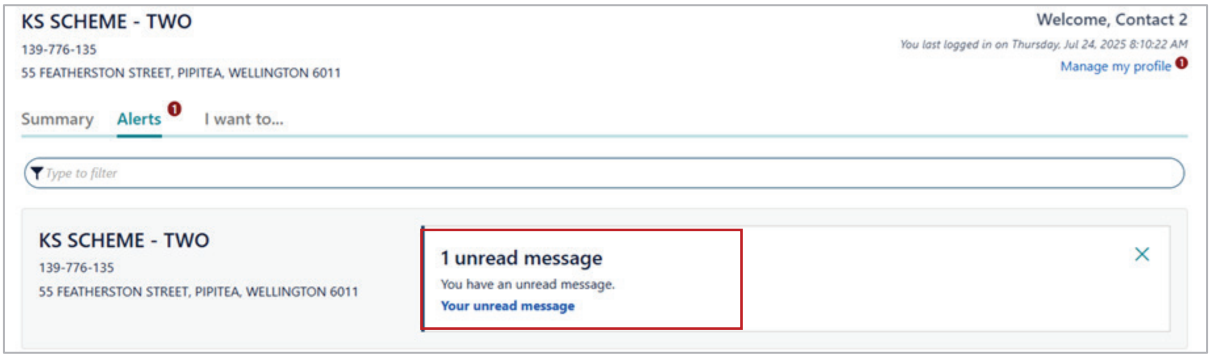
Once you've viewed the item or completed the required action, the alert will automatically disappear.

How to view alerts

1. Select the **alerts** tab > your alerts are listed here



2. Your alerts are listed here



How to view or restore dismissed alerts

1. Select **Manage my profile**

2. Select **Alerts** > **view dismissed alerts**