

Extension of time (EOT) dashboard

A guide on how to read your EOT dashboard.

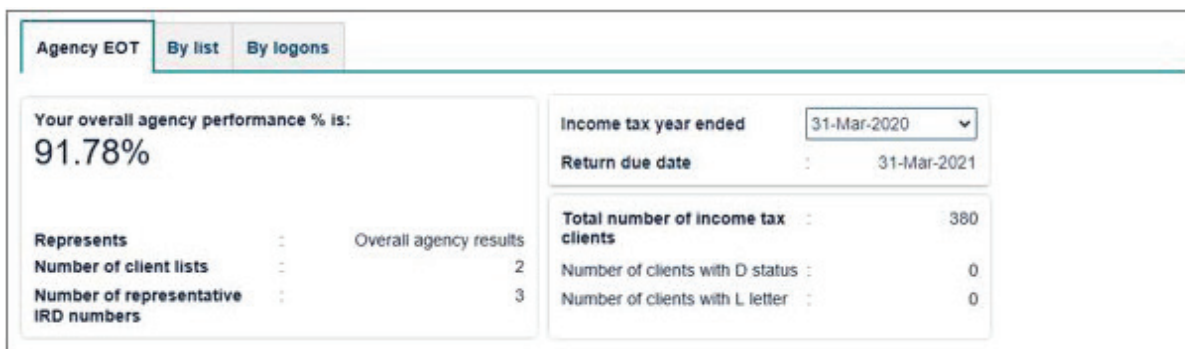
Tax agents see a different view in **Manage agency** to other intermediaries.

The first page is the **Agency EOT** tab. This shows the overall agency performance and includes data from all client lists as well as any representative lists that they may have under a different IRD number, for example, individual partners.

The first box shows the overall agency performance percentage. This is the percentage we will monitor you against as outlined in the **Tax agents' extension of time (EOT) agreement - IR9XA**. The example shows this tax agency has two client lists. Three of the partners are also registered as tax agents under their own IRD numbers as agency representatives.

On the right-hand side, the top box will show the income tax period the results relate to and the extended return due date for that period.

Below that is the total number of clients that you are linked to for income tax. This figure includes any clients who do not have a return expectation (ceased companies, auto issued - more info requests). Included in this figure will be any clients who have L EOT or D EOT that have been removed from the calculation below.



The overall breakdown table (over page) is split across standard, early and late balance dates as well as a total column.

The first section shows the volume of returns required, including auto issued - more info requests. It excludes any customers with L EOT and D EOT, unless the return has been filed. We also break the figures down to show those that have an EOT and those that don't.

The second section shows the volume of returns that have been filed and received by IR, including auto issued - more info requests. We also break these figures down to show those that have an EOT and those that don't.

The percentage lodged is a calculation of the above information – total returns with EOT that IR have received in comparison to the total returns with EOT that are required.

Overall breakdown

	Standard	Early	Late	Total
Total income tax returns required	220	0	155	375
With EOT	219	0	0	219
No EOT	1	0	155	156
Total income tax returns lodged	201	0	110	311
With EOT	201	0	0	201
No EOT	0	0	110	110
Percentage lodged				
With EOT	91.78%	0.00%	0.00%	91.78%
No EOT	0.00%	0.00%	70.97%	70.51%

The **Client lists** table will show the results for each of your client lists. You can see the performance percentage of each list and you can select each one to see the breakdown.

Any representative IRD numbers that feed into the overall results will show a combined performance percentage. For security reasons you can't access the breakdown of representative client lists from here. If you are authorised, you can log in under the web logon associated to the agency representative to see the same dashboard. This will provide the breakdown.

Client lists

Client list ID	Name	Performance %
000-000-001	WE SORT YOUR TAX LIMITED	94.23%
000-000-002	PRIVATE LIST	90.48%
	Representative IRD number totals	91.35%

Client list breakdown

When you click on the **Client list ID** link you can view the results breakdown. This provides a filtered view of the results for that list. The header will show that the results only represent a component of the overall agency performance percentage.

List EOT	Logons	List details
This list performance % is: 94.23%		
Represents : Component of overall agency results		
Income tax year ended : 31-Mar-2018		
Return due date : 31-Mar-2019		
Total number of income tax clients : 87		
Number of clients with D status : 0		
Number of clients with L letter : 0		

The **List breakdown** table is calculated in the same way as the Overall breakdown table.

List breakdown					
		Standard	Early	Late	Total
Total income tax returns required		53	0	31	84
	With EOT	52	0	0	52
	No EOT	1	0	31	32
Total income tax returns lodged		49	0	22	71
	With EOT	49	0	0	49
	No EOT	0	0	22	22
Percentage lodged					
	With EOT	94.23%	0.00%	0.00%	94.23%
	No EOT	0.00%	0.00%	70.97%	68.75%



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