

Extension of time (EOT) dashboard

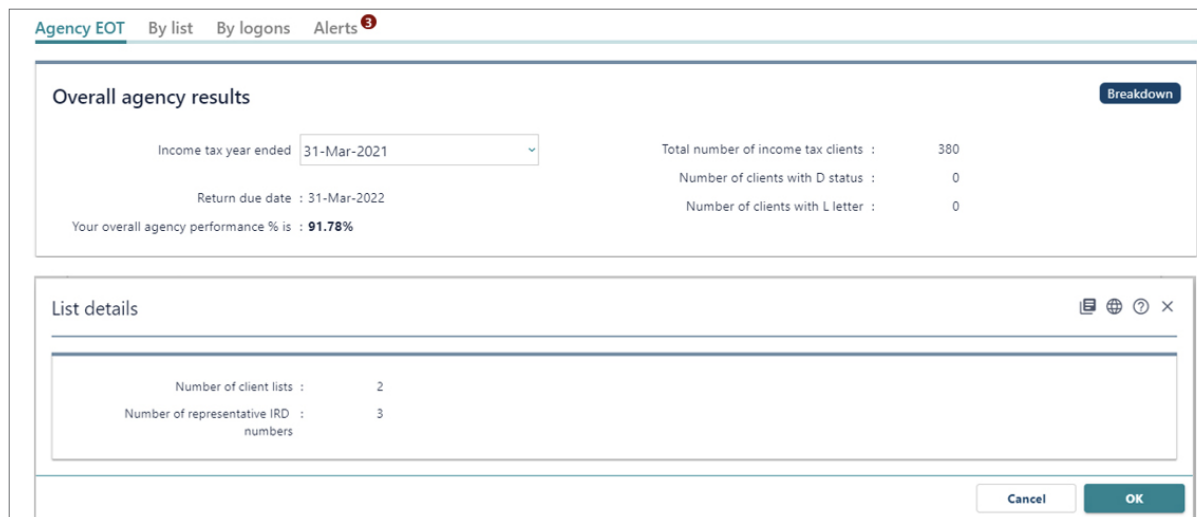
A guide on using the EOT dashboard in myIR.

Tax agents see a different view in **Manage agency** to other intermediaries. This guide covers the tax agent's 'Manage agency' view.

Agency EOT and overall agency results.

The first tab is the **Agency EOT** showing your agency's overall performance. It includes data from all client lists, and any representative lists that you may have under a different IRD number, for example, individual partners.

In the example image below your agency's overall performance as a percentage is 91.78%. We use this percentage to check your agency's performance against the performance measure in the **Tax agents' extension of time (EOT) agreement - IR9XA**. In the example your agency's list details shows two client lists. Three partners are also registered as tax agents under their own IRD numbers as agency representatives. (You view the list details by selecting the **Breakdown** button in the top right hand corner.)



The screenshot shows the 'Agency EOT' dashboard. At the top, there are tabs for 'Agency EOT', 'By list', 'By logons', and 'Alerts' (with a notification icon). The 'Overall agency results' section includes a dropdown for 'Income tax year ended' set to '31-Mar-2021', a 'Return due date' of '31-Mar-2022', and 'Your overall agency performance % is : 91.78%'. To the right, a table shows: 'Total number of income tax clients : 380', 'Number of clients with D status : 0', and 'Number of clients with L letter : 0'. A 'Breakdown' button is in the top right. Below is the 'List details' section, which shows 'Number of client lists : 2' and 'Number of representative IRD numbers : 3'. There are 'Cancel' and 'OK' buttons at the bottom right.

The Overall agency results panel shows the income tax period the results are for, and the extended return due date for that period. The results panel also shows you the total number of clients you're linked to for income tax. This figure includes clients who:

- do not have a return expectation (ceased companies, 'auto issued - more info' requests)
- have L EOT or D EOT that have been removed from the calculation below.

Overall breakdown table

The overall breakdown table shows standard, early and late balance dates with a total for them. The left hand column of the table has three parts showing tax returns required, those lodged, and a percentage of those lodged.

Tax returns required

This is the number of returns required, including 'auto issued - more info' requests. It excludes customers with L EOT and D EOT, unless their return has been lodged. We also break the figures down to show customers that have, and do not have, an EOT.

Tax returns lodged

This is the number of returns lodged and received by us, including 'auto issued - more info' requests. We also break these figures down to show those that have, and do not have, an EOT.

Percentage of lodged tax returns

This is a calculation that compares the above information. That's total returns with EOT we've 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%

Client list tables

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

Any representative IRD numbers in the overall results show a combined performance percentage. For security reasons you cannot access representative client lists breakdowns from here. If you're authorised, log in under the web logon associated to the agency representative. You can then view the same dashboard and access the breakdown.

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 ID

When you select the **Client list ID** link you can view the results breakdown for that client. This is a filtered view of the results for that list. It only shows the results that represent a component of the overall agency performance percentage.

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%

When you select 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
Component of overall agency results		
Income tax year ended	<input type="text" value="31-Mar-2021"/>	Total number of income tax clients : 87
Return due date : 31-Mar-2022		Number of clients with D status : 0
This list performance % is : 94.23%		Number of clients with L letter : 0

The **List breakdown** table is calculated in the same way as the Overall breakdown table. But only shows the data for the client list ID you've selected.

List breakdown		Standard	Early	Late	Total
Total income tax returns required	With EOT	53	0	31	84
	No EOT	1	0	31	32
Total income tax returns lodged	With EOT	49	0	22	71
	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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