Tax agent and intermediaries self-service options

This factsheet outlines the tools and self-service options we offer tax agents, intermediaries, and their staff. Use it to find quick and easy ways to interact with us.

To help you interact with us more efficiently we've compiled a list of things you can do using myIR, Gateway Services and our website. More information can easily be accessed through the 'Intermediaries & others' tab on our home page.

myIR

myIR makes it easier for you to manage your clients' accounts online. You can use it for your agency taxes as well.

Examples of actions tax agents and intermediaries can do are:

- link and delink clients
- transfer credits and payments
- redirect client refunds to your agency
- redirect client mail to your agency
- view clients' earning information, balances, and transactions
- view your overall agency filing performance
- send a web message
- review and save all web messages for your clients
- submit a short-process ruling
- register a client for a new IRD number
- cancel a client's tax type
- work out the maximum amount available and best effective date for transfers
- review and save all mail sent to your linked clients
- manage mail and alert subscriptions for up to 1,250 client accounts
- manage staff access to clients
- modify staff access to the services available
- manage up to 50 favourites
- change contact details and reset passwords
- update your key office holders
- set up instalment arrangements on behalf of your clients
- complete hardship applications on behalf of your clients
- update refund bank accounts
- make a payment
- manage goods and services tax (GST) and fringe benefit tax (FBT) filing frequencies
- view and manage Small Business Cashflow loans
- estimate and re-estimate provisional tax
- issue L letter (from 1st August – 15th February)
- request D status (1st August – 30th March).
- add non-active declarations for companies and trusts (customer master link required)

Filing and amending returns for you and your clients:

- Income tax returns and completing automatically issued income tax assessments
- GST
- Donation tax credit claims
- Managing payroll including Employer Information filing, amending, employee details and KiwiSaver
- FBT
- Gaming machine, lotteries, casino and totaliser duties
- New Zealand foreign trusts
- Income equalisation
- Investment income reporting including interest, dividends, portfolio investment entity (PIE) income, taxable Māori authority distributions and royalties.

Registrations

- as an employer (or IR56 taxpayer)
- for GST
- for donation tax credits
- for FBT
- for dividend withholding tax (DWT)
- to receive Working for Families
- for Resident withholding tax on interest (IPS)
- as an approved issue levy (AIL) payer
- to pay non-resident withholding tax (NRWT)
- as a portfolio investment entity (PIE)
- for resident withholding tax (RWT) on dividends treated as interest or Māori authority distributions
- for gaming machine duty (GMD)
- for research & development tax incentive (RDTI)

- as a holder of unclaimed money (UCM)
- Common Reporting Standard (CRS) institution with CRS obligations
- Foreign Account Tax Compliance Act (FACTA) obligations
- as a New Zealand foreign trust
- for income equalisation

Access Agency reports:

- client list report – access client information in one report
- agency activity reports
- all client transaction report
- GST return summary report
- PAYE return summary report
- Web logon activity – allows 'owners' to monitor staff activity in myIR
- unfiled returns report

Gateway services

Inland Revenue's gateway services allow software providers to offer improved filing and client management services to their tax agent and intermediaries clients. These services provide you with greater accessibility to your clients' information, and allow you to file and amend returns, send, and upload documents and receive notifications from us.

Software providers have the discretion to choose our gateway services they integrate with and offer to their customers. Alternatively, you can use myIR.

Your software provider should let you know what you need to do to get set up for gateway services in their software.

To use gateway services all you need is a myIR account with the appropriate level of access.

Return service

Our returns service enables software to file returns for AIM, GST, investment income reporting, payday filing, income tax and donation tax credits.

Other services that may be available in your chosen software package could include:

- Document service – lets you upload and send supporting material, for example financial statements when you file your clients return. You cannot send correspondence through gateway services.
- Notification service – will notify you of changes on your clients' accounts or actions required.
- Intermediation service – lets you link, delink, manage redirects and pull client list reports.
- Transaction data service (TDS) – provides access to client account transactions.
- Customer services suite – provide access to client attributes and lets you update your clients address, bank account and contact details.

Inland Revenue's website

Our website **ird.govt.nz** provides information, services and tools to help you manage your clients' and your agency's taxes.

You can:

- elect to become a Māori Authority
- register for myIR
- apply for or renew a certificate of exemption for scheduler payments (WT)
- make a foreign investment fund or controlled foreign company disclosure
- download a **Financial statements summary - IR10**
- access calculators and worksheets
- sign up for and read our newsletters **ird.govt.nz/subscribe**
- access to related websites
- request stationery
- watch webinars
- view our updates and Top Solutions

Provide feedback

- pass on a compliment
- provide feedback about Inland Revenue
- give us feedback about our website
- make a complaint
- report tax evasion or fraud.

ird.govt.nz

Go to our website for information and to use our services and tools.

- **Log in or register for myIR** - manage your tax and entitlements online.
- **Calculators and tools** - use our calculators, worksheets, and tools, for example, to check your tax code, find filing and payment dates or calculate your student loan repayment.
- **Forms and guides** - download our forms and guides

Forgotten your user ID or password?

Request these online from the myIR login screen and we'll send them to the email address we hold for you.

Te Kāwanatanga o Aotearoa
New Zealand Government