Inland Revenue
Te Tari Taake

Business
Ngā Ūmanga

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Managing client mail subscriptions and alerts – Payroll bureaus

myIR has client subscription services you can use to help manage your clients. Once you've set up subscriptions for up to 1,250 client accounts, you can see:

- **alerts telling you about important tasks to do**
- **email notifications when clients have new letters from us.**

This guide shows you what subscription services there are and how to use them.

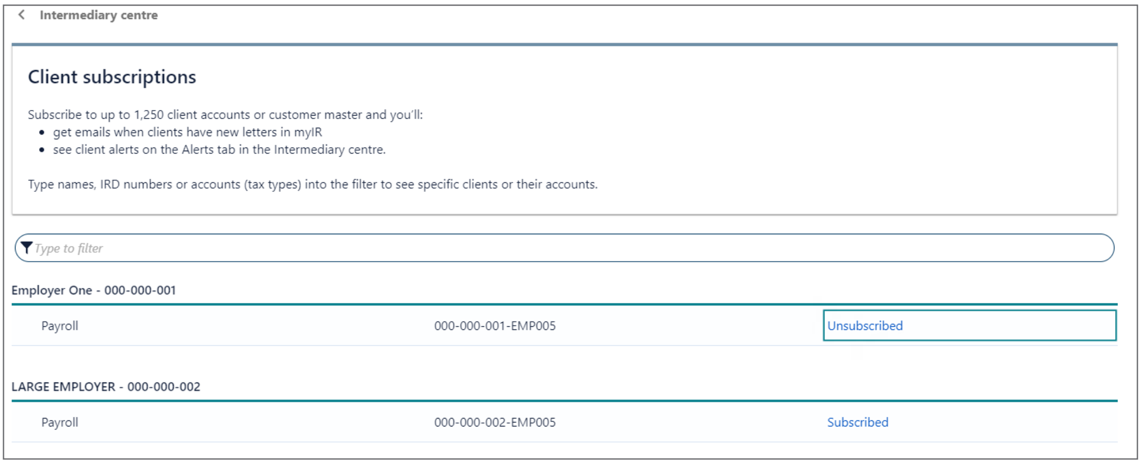
Subscriptions

To start getting alerts and email notifications for letters we've sent to clients you'll need to subscribe to them.

There are 2 areas of myIR that let you manage client subscriptions. The difference is one is for you to manage your own subscriptions, and the other is for managing employees' subscriptions.

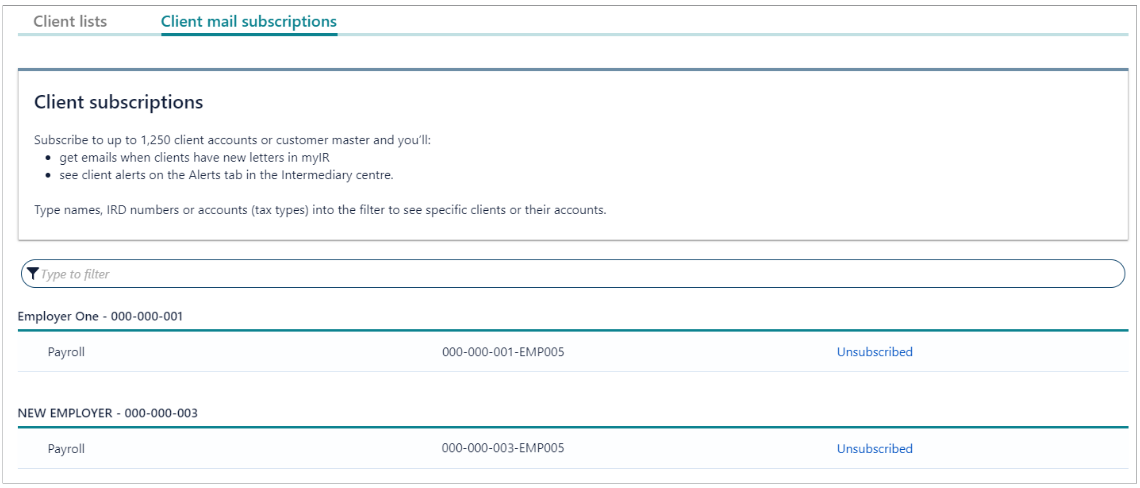
Managing your own subscriptions

Your own subscriptions are managed here: **Intermediary centre > Manage subscriptions**



Managing employees' subscriptions

Your myIR role needs to be either 'owner', 'administrator' or 'restricted administrator' to manage subscriptions for employee web logons: **Manage agency > By logons tab > [select logon 'Staff access'] > Client mail subscriptions**



How to unsubscribe and subscribe

To subscribe or unsubscribe to a linked client:

1. Search or filter on the client subscriptions screen and use 'Subscribed' or 'Unsubscribed'.
2. Select 'Unsubscribed' to subscribe or 'Subscribed' to unsubscribe to the Payroll account.

Alerts

After you've set up client subscriptions, you'll get to see the alerts for them. You'll then know which clients have:

- unread letters and messages
- payments due or overdue
- upcoming and outstanding returns to file.

How to view alerts

When you've set up client subscriptions, their alerts are available in the **Intermediary centre**:

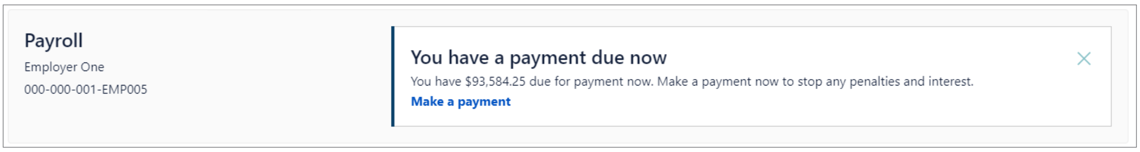
Each alert has a title, short description, and a link to what needs doing.

How to dismiss alerts

You can dismiss alerts from your alert list by clicking the 'x'. You may want to do this if you've:

- already set up reminders for tasks in your own system
- completed an alert's action and you're waiting before submitting it to us.

You can see alerts you've dismissed by restoring them. Once a task is completed for an alert it's deleted.



Filtering to find alerts

Filtering lists all of your clients' alerts by what needs doing (All actions).

You can also use the free text filter to search for a client's name or key word on the screen:

Note: You can view alerts for non-subscribed clients from within the client's account.

All client mail service

The All client mail service is another way of managing mail instead of using subscriptions. To access the service, go to: **Intermediary centre > My clients > All client mail**

With the service you can create a report that:

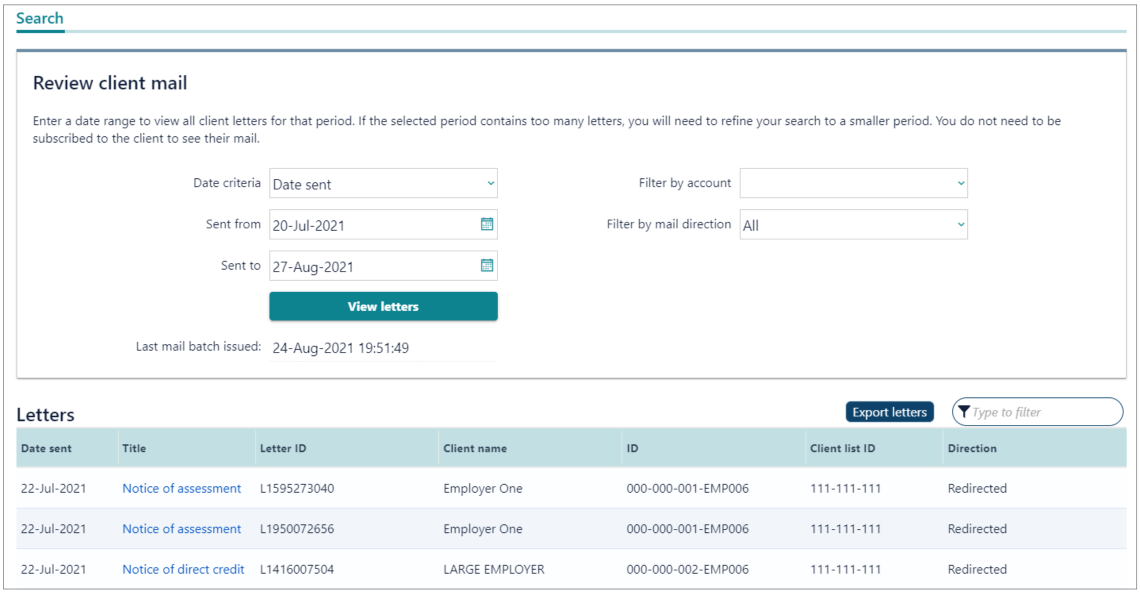
- includes all your clients, not only those you're subscribed to, so you never miss mail
- shows extra information, such as mail direction to the agent or sent to the client.
- lets you export letter PDFs in bulk, saving you time

Exporting letters using the All client mail service

You'll need to have a myIR role of at least 'restricted administrator' to use all of the All client mail service export options.

Exporting letters to your desktop can help with record keeping. It's also useful if you need to see which letters are 'read' or 'unread':

1. Enter the date range into the 'sent from' and 'sent to' fields in the All client mail screen:

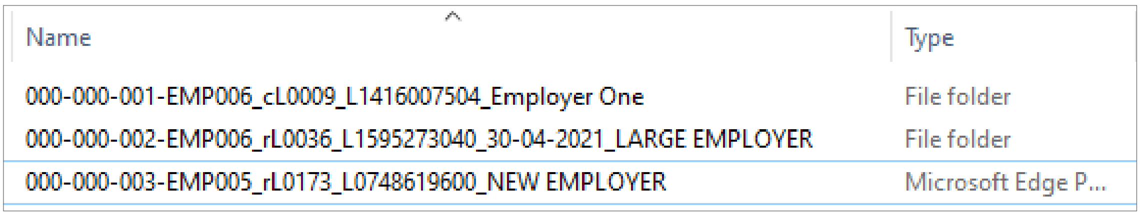


Date sent	Title	Letter ID	Client name	ID	Client list ID	Direction
22-Jul-2021	Notice of assessment	L1595273040	Employer One	000-000-001-EMP006	111-111-111	Redirected
22-Jul-2021	Notice of assessment	L1950072656	Employer One	000-000-001-EMP006	111-111-111	Redirected
22-Jul-2021	Notice of direct credit	L1416007504	LARGE EMPLOYER	000-000-002-EMP006	111-111-111	Redirected

2. Export the letters as PDFs to an 'unread mail' folder on your desktop.

Date sent	Title	Letter ID	Client name	ID	Client list ID	Direction
22-Jul-2021	Notice of assessment	L1595273040	Employer One	000-000-001-EMP006	111-111-111	Redirected
22-Jul-2021	Notice of assessment	L1950072656	Employer One	000-000-001-EMP006	111-111-111	Redirected
22-Jul-2021	Notice of direct credit	L1416007504	LARGE EMPLOYER	000-000-002-EMP006	111-111-111	Redirected
20-Jul-2021	Employee deduction...	L0748619600	NEW EMPLOYER	000-000-003-EMP005	111-111-111	Sent to client

3. Open your unread mail folder then review, delete, or save the letter to your client management system:



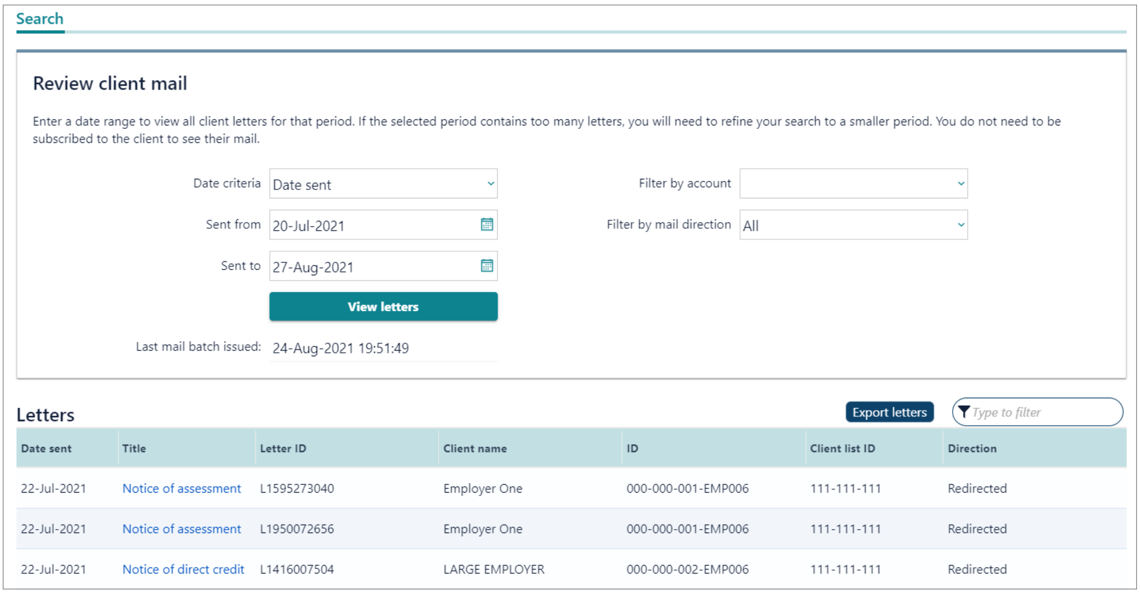
Name	Type
000-000-001-EMP006_cL0009_L1416007504_Employer One	File folder
000-000-002-EMP006_rL0036_L1595273040_30-04-2021_LARGE EMPLOYER	File folder
000-000-003-EMP005_rL0173_L0748619600_NEW EMPLOYER	Microsoft Edge P...

Note: To assist with identifying what each letter is about go to: **https://www.ird.govt.nz/topics/intermediaries/getting-authority-to-act/managing-client-mail/mail-type-code-reference-list**

'User' access to the All client mail service

There is a version of the All client mail service you can use if your myIR role is 'user'. With this version your report:

- can be run for any client list you have access to
- has a default date range using the date you run the report and the last day a letter was sent (in most cases this will be the previous day)
- does not give you the option to open the letters or export them.



Using this service only for managing client mail

If you choose to only use the All client mail service to manage client mail. You can:

- unsubscribe to all client mail subscriptions to stop getting notification emails
- leave 'Mail subscriptions' unchecked when running the Agency activity report. This stops you getting what can be a large amount of client account data you do not need.

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, calculate your student loan repayment.
- **Forms and guides** - download our forms and guides.

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