Managing client mail – Bookkeepers and other representatives

We have recently made improvements to how client mail is managed in myIR.

Letters will be sent to you or your client based on the mail direction for a particular account (for example, GST). The recent improvements now give you as a bookkeeper or other representative full flexibility to set up who in your business receives notifications of new letters by subscribing based on clients and accounts.

This guide explains who will receive what, and the different options now available to you and your business, for managing notifications of new client mail in myIR.

What your client will receive

If the mail is <u>not</u> redirected to a tax agent or PAYE intermediary, you and your client will either receive:

- a notification email, or
- a paper copy of the letter.

If the mail is redirected to a tax agent or PAYE intermediary, and your client has myIR:

- they won't receive a notification email
- the letter won't show as an unread item in their myIR
- they won't receive a paper copy of the letter, and
- they can still log in to myIR and read the letter at any time.

You can still choose to receive a notification of all the client mail, even if it has been redirected to a tax agent or PAYE intermediary.

What you will receive

You can receive notification emails based on which clients you've subscribed to.

Notifications will now contain client names and letter types to help you identify what the mail is about and who it affects. Notifications will also contain the myIR logon that will need to be used to view the mail.

When viewing the client mail, you will need to check who the letter is addressed to before taking any action. Your client or a tax agent/PAYE intermediary will have also received it.

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What you need to do

You have three different options for managing client mail, and – more specifically – who in the business receives what notifications. You will need to decide on what works best for you – considering the size of your business – and how you operate.

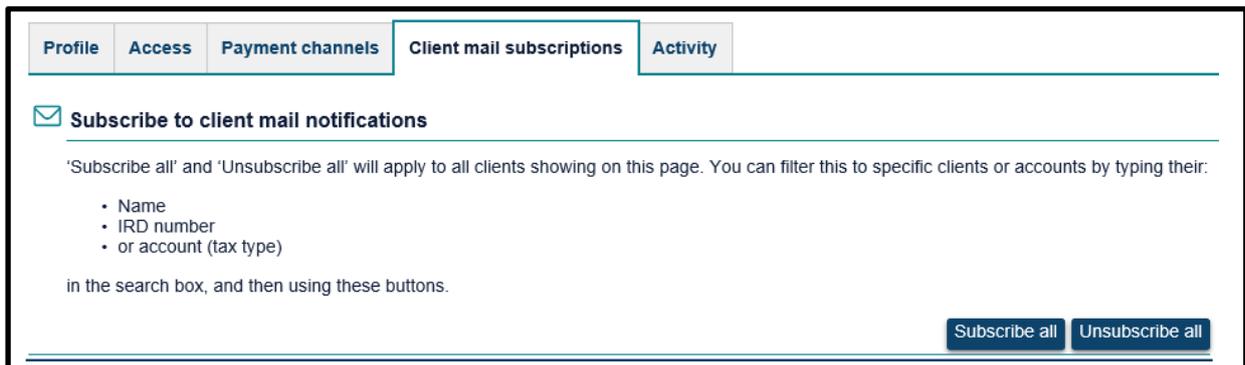### Option 1 – One person in your business subscribes to all notifications

If you'll have one person in your business responsible for all client mail, they'll need to 'subscribe all' to all the clients on your client list. All the other employees should 'unsubscribe all'.

Owners and Administrators can manage subscriptions for employee web logons from Manage agency>By logons tab>[select logon]>Client mail subscriptions tab. A screenshot of the Client mail subscription tab is below.
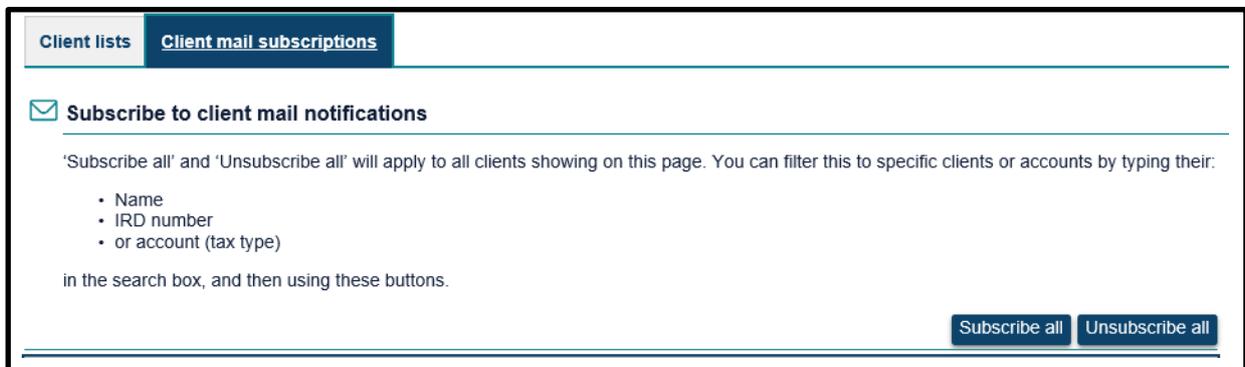
Each employee (including Owners and Administrators) can also access their own subscriptions from Settings>Client mail subscriptions tab. A screenshot of the Client mail subscriptions tab is below.
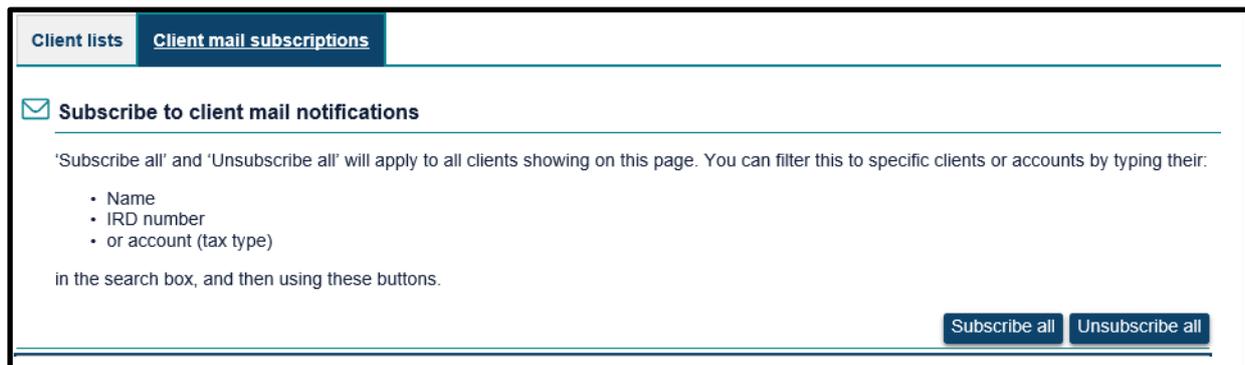

As new clients are linked, the person responsible for the mail will need to subscribe to them. The Agency activity report will show all the accounts that no one is subscribed to, highlighting the clients the person responsible for the mail needs to subscribe to.

The report is only available to Owners and Administrators under Agency reports>Agency activity report. It can be run for any time period as the 'Mail subscription' section will always retrieve real time information.

Option 2 – Clients are split between staff – different staff have different subscriptions

If you'll have multiple people in your business responsible for client mail, they'll need to subscribe to the clients they are responsible for.

Owners and Administrators can manage subscriptions for employee web logons from Manage agency>By logons tab>[select logon]>Client mail subscriptions tab. A screenshot of the Client mail subscriptions tab is below.

Each employee (including Owners and Administrators) can access their own subscriptions from Settings>Client mail subscriptions tab. A screenshot of the Client mail subscriptions tab is below.
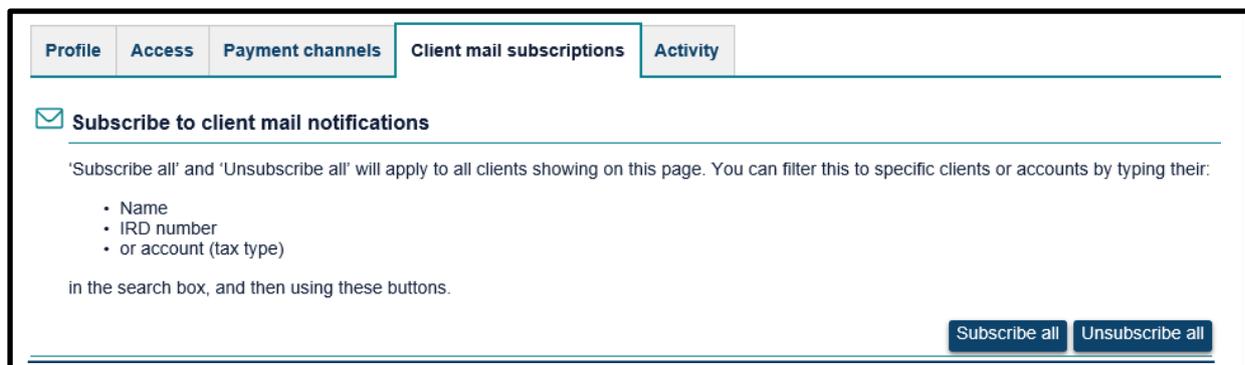
When you're in the Client mail subscriptions tab, you can filter the page and apply the 'Subscribe all' or 'Unsubscribe all' to your filtered view. For example, if you filter to 'working for families', it will show all the Working for Families Tax Credits accounts your business is linked to and clicking 'Unsubscribe all' will apply the change to everything your filter retrieved.

As new clients are linked, the person responsible for the new client will need to subscribe to them. The Agency activity report will show all the accounts that no one is subscribed to, highlighting the clients the person responsible for the mail needs to subscribe for.

The report is only available to Owners and Administrators under Agency reports>Agency activity report. It can be run for any time period as the 'Mail subscription' section will always retrieve real time information.

3

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Option 3 – No one in your business subscribes to notifications – all mail managed on All client mail report

If your business is larger, it might be easier to use the All client mail service to see letters that are issued requiring action. This service is available to Owners and Administrators from the Tax preparer tab>My clients section>All client mail. A screenshot of All client mail is below.

'All client mail' can be run daily to retrieve all the letters we have sent for linked clients. It can be filtered as well as whether it was 'Redirected' to a tax agent/PAYE intermediary or 'Sent to client'.

Each letter can be opened and saved as a PDF for allocation within your business by selecting the hyperlink in the 'Title' column.

You can select multiple letters to export as individual PDF's by using the 'Export letters' button. This will open a selection box beside each letter. Once you have selected all the relevant letters, use the 'Export to zip' button. Letters from our old system will be available in this service too, however they cannot be selected for bulk export. These will need to be opened individually and saved one at a time.

Each PDF will be labelled with the clients' IRD numbers, account ID (where applicable) and the unique letter ID to make it easier to save into your own client management system.

If your business will use this service to manage client mail, all client subscriptions should be 'Unsubscribed' to stop the notification emails being received.

Owners and Administrators can manage subscriptions for employee web logons from Manage agency>By logons tab>[select logon]>Client mail subscriptions tab. A screenshot of the Client mail subscriptions tab is below.

Each employee (including Owners and Administrators) can access their own subscriptions from Settings>Client mail subscriptions tab. A screenshot of the Client mail subscriptions tab is below.

The 'Mail subscriptions' section of the Agency activity report will become irrelevant as it will show all client accounts. Depending how large your business is, this could be a large data extract. It's best not to select the 'Mail subscriptions' tick box when running the Agency activity report for monitoring other activity within your business.