



Inland Revenue
Te Tari Taake

PROGRESS SUMMARY OF PRIORITISED CONCERNS RAISED BY TAX AGENTS

For more details please visit:
www.Ird.govt.nz/solutions

The following tables show the progression of each focus area beginning with define requirements through to formally closing the issue.

As at 5 July 2019

Please note this is updated weekly so contact your AM for the most recent version

PROGRESS SUMMARY

Priority group	Target completion date	Focus area	Summary of actions	Status (white shading shows progress though process)
1	12 July 19	Automatically issued income tax assessments	<ul style="list-style-type: none"> Provide more visibility of the automatically issued income tax assessments and investigate options to make it easier for tax agents to manage their clients within the new legislation. 	
		Letters/messages from new system	<ul style="list-style-type: none"> Review correspondence to ensure they are being addressed to the appropriate party and issuing at the right times. <i>(May be extended to cover off new issues raised, we have closed off some issues but are keeping this open as we review for other issues)</i> 	
		Transfers	<ul style="list-style-type: none"> Provide more visibility of the transfer rules and processes. Review credit and payment transfers to ensure that they are being completed correctly. <i>(May be extended to cover off new issues raised we have closed off some issues and communicated them but are keeping this open as we review for other issues)</i> 	
2	26 July 19	Imputation credit account (ICA) and Maori authority credits (MAC) balance	<ul style="list-style-type: none"> Investigate options to make more information available in myIR for ICA and MAC balances. 	
		Income tax display in myIR	<ul style="list-style-type: none"> Investigate options to provide visibility of schedular income, PAYE deductions, Earnings not liable for ACC and student loan deductions in myIR. 	
		Letters in myIR	<ul style="list-style-type: none"> Ensure the unread letters alert is correct and that mail items are accessible within myIR. 	
		Look Through Companies (LTC)	<ul style="list-style-type: none"> Investigate possible issues with Look Through Company (LTC) status and ensure all LTC's are able to file returns in myIR. 	
		Splitting interest and PIE income	<ul style="list-style-type: none"> Provide more visibility of how to split joint interest and when to declare PIE income for income tax purposes. 	

PROGRESS SUMMARY

Priority group	Target completion date	Focus area	Summary of actions	Status
3	9 Aug 19	Provisional tax	<ul style="list-style-type: none"> Investigate options to provide more visibility of provisional tax information and ensure the correct information is being displayed. 	
		Visibility of customer data in myIR	<ul style="list-style-type: none"> Provide more visibility and clarity on customer status and attributes in myIR. 	
		Payments and credits refunding	<ul style="list-style-type: none"> Investigate options to prevent payments being automatically refunded when an incorrect period is given or when payment splitting is required. Ensure the automatic credit offsetting is working correctly. 	
		Updating penalties and interest	<ul style="list-style-type: none"> Ensure penalties and interest are correctly applied and provide visibility of any manual processes underway. 	
4	23 Aug 19	Return printing in myIR	<ul style="list-style-type: none"> Review options for printing return attachments. 	
		Status in myIR	<ul style="list-style-type: none"> Review the current status of submissions in myIR and investigate options to provide more visibility and tracking. 	
		Running totals	<ul style="list-style-type: none"> Investigate alternative options to running balances to make the transactions details easier to understand. 	
		IR website	<ul style="list-style-type: none"> Improve the website functionality and usability for tax agents. 	
		Consolidated groups	<ul style="list-style-type: none"> Investigate possible issues with access to consolidated group data and communicate the new structure. 	
		Student loan balance	<ul style="list-style-type: none"> Make the student loan balance visible. 	
		Outstanding amount alert in myIR	<ul style="list-style-type: none"> Update the myIR customer alert to remove ambiguity. 	
		PAYE financials	<ul style="list-style-type: none"> Provide more visibility of how the PAYE financials are managed and why transactions are delayed. 	
		IR responsiveness	<ul style="list-style-type: none"> Provide support and training to our internal staff to improve responsiveness. 	
COMPLETED				

STEPS TAKEN IN RESOLVING EACH ISSUE

Below is a list of key actions that are taken to resolve a single issue. Some focus areas have multiple distinct areas for resolution where these steps would be repeated for each issue resolution. The focus areas differ in size and number of issues raised sitting within them. This will also affect the speed at which they progress. Please note the dates included are indicative only.

Define Requirements

- Review issues raised related to the focus area.
- Understand where problem is occurring in system.
- Determine root cause of the issue.
- Using feedback from our customers, facilitate agreement on the business requirements across multiple Subject Matter Experts, Product Owners, and Business Architects.

Change System

- Using the business requirements our Developers will build the new solution.
- The solution will need to pass 3 levels of testing. If the solution does not pass the testing, it will go back to the Developer for changes, then tested again.
- Once the solution has passed testing, it is released to production.

Communicate

Internal Communications

- Determine what communication and training is required.
- Develop communications material.
- Follow the review and approval process.
- Release communication and/or training

External Communications

- Determine communication method(s), i.e.
 - Inland Revenue Website
 - Agents Answers
 - Newsletters
- Develop communication material.
- Follow the review and approval process.
- Release Communications.

Close

- Once all previous actions have been completed, the issue is "resolved."
- There is a 5 day period where the issue stays in a holding pattern in resolved – this is to confirm that the issue is fully resolved. If something comes up, the issue will be re-opened and follow the same resolution path again.
- If no additional issues are raised, we will close the issue.
- We will only close a focus area once all issues relating to that area have been resolved.