

Tax Traders'

Inland Revenue data integration

Setting up the connection

This document outlines the steps to connecting your client's Inland Revenue data with Tax Traders' system. The Inland Revenue data is obtained via Taxlab's data feed service, so as part of this set up you will be directed to [Taxlab](#) to complete a one-time set up. There is no cost to you for the set up or ongoing connection with Taxlab, Tax Traders has arranged to cover all costs directly with Taxlab.

Once connected your Inland Revenue data will flow through Taxlab directly to Tax Traders. We have provided links to Taxlab's [Terms of Use](#), [Inland Revenue Data Terms of Use](#) and [Privacy Policy](#) along with excerpts relating to data below:

4.3 [Taxlab] will take appropriate technical, physical and organisational measures and safeguards against unauthorised or unlawful processing of Your Data or its accidental loss, destruction or damage and we will, as part of these measures, use reasonable endeavours to back-up Your Data...

4.5 You acknowledge and agree that we may use Your Data for the purpose of:

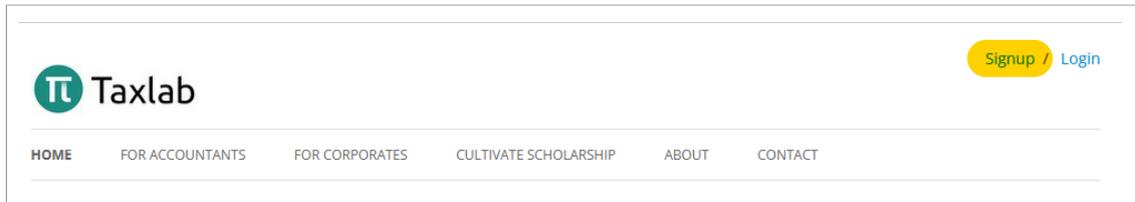
- (a) performing our obligations under this Agreement;
- (b) ensuring that you are complying with the terms and conditions of this Agreement;
- (c) improving or enhancing the Subscription Services;
- (d) performing data analysis, machine learning, or cross entity analysis, all on an aggregated and/or anonymous basis,

7.2 We acknowledge and agree that, subject to clause 7.1, you own the Intellectual Property Rights in Your Data. You grant to us a non-exclusive right to use Your Data to perform our obligations under this Agreement.

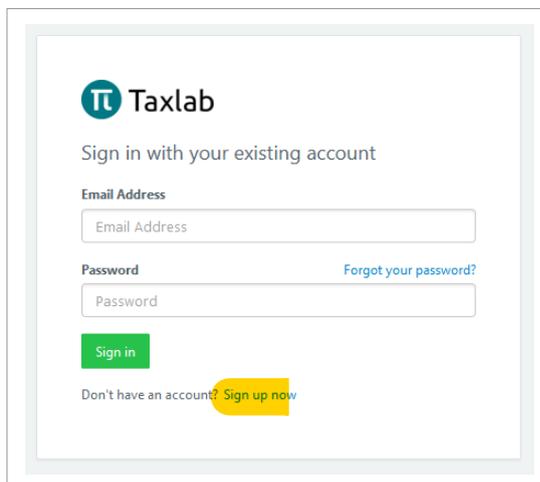
8.1 Each party will treat as confidential all information obtained from the other pursuant to this Agreement. Neither party will divulge such information to any persons (except to their employees (for whom that party will be responsible) and then only to those employees who need to know) without the other party's prior written consent.

Step 1: Register with Taxlab

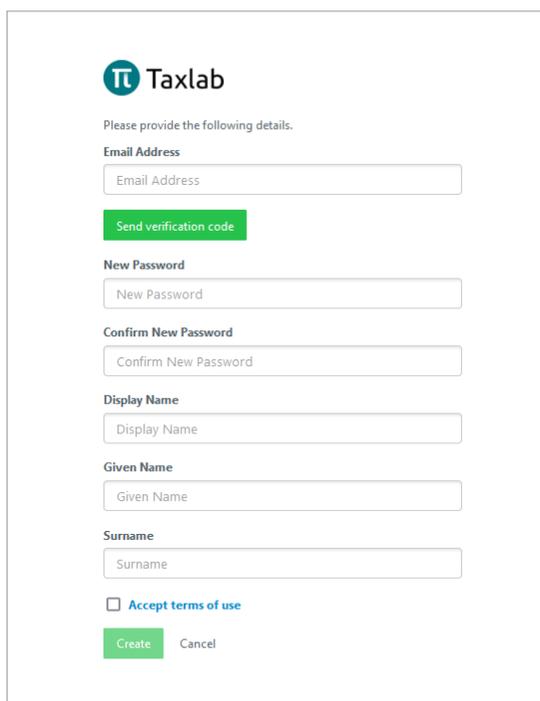
Go to www.taxlab.co.nz and signup. All this requires is an email and password.



If you don't already have an account with Taxlab you will need to click on the Sign up now link as shown below.

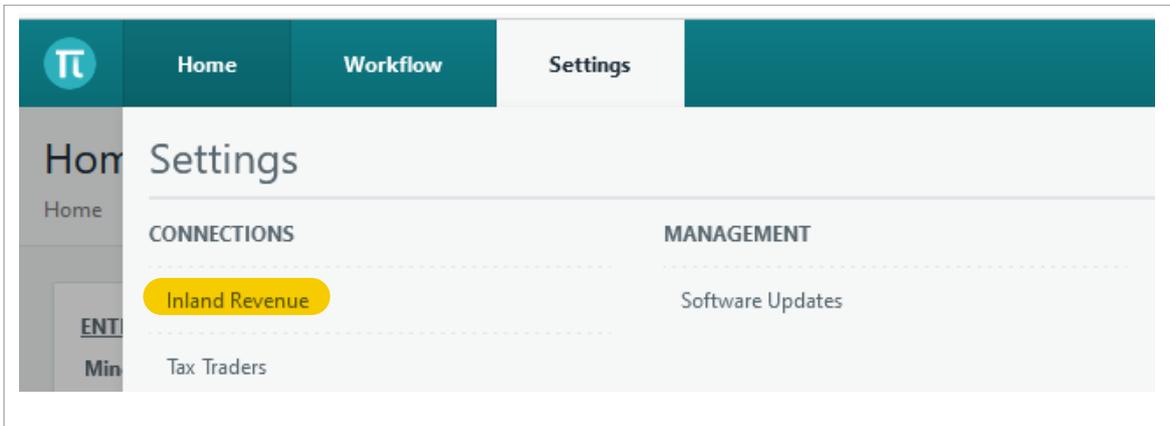
The image shows the sign-in page of the Taxlab website. At the top left is the Taxlab logo. Below it is the text "Sign in with your existing account". There are two input fields: "Email Address" and "Password". To the right of the "Password" field is a blue link that says "Forgot your password?". Below the input fields is a green button labeled "Sign in". At the bottom left, there is a link that says "Don't have an account? Sign up now", where "Sign up now" is highlighted in yellow.

Enter your email address and click the "Send verification code" button to verify your email address. Once this has been done you need to click the link in the email you receive and then complete the sign up by filling out the details on the registration form. Click "Create" once done.

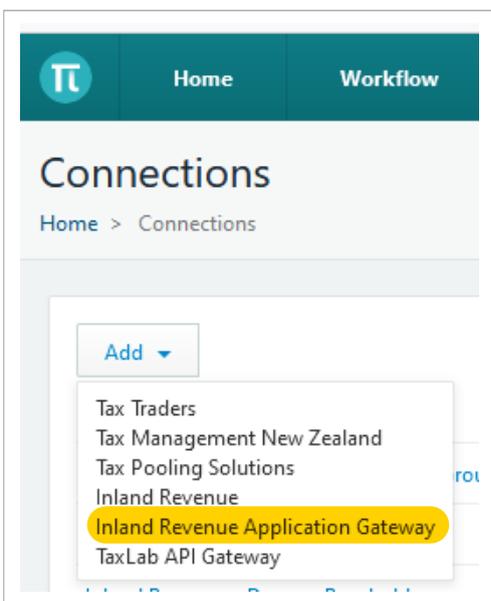
The image shows the registration form on the Taxlab website. At the top left is the Taxlab logo. Below it is the text "Please provide the following details.". There are several input fields: "Email Address", "New Password", "Confirm New Password", "Display Name", "Given Name", and "Surname". Below the "Email Address" field is a green button labeled "Send verification code". Below the "Confirm New Password" field is a checkbox labeled "Accept terms of use". At the bottom are two buttons: a green button labeled "Create" and a grey button labeled "Cancel".

Step 2: Connect your account to Inland Revenue

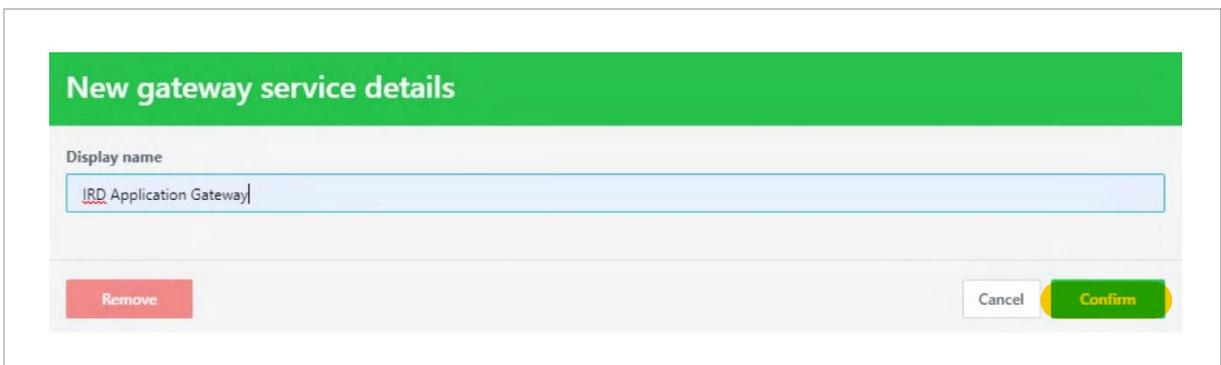
From the Taxlab account home page, you'll need to enter your myIR login details to establish the connection with Inland Revenue. This should be the same myIR login that you use when you want to access your tax agency clients at Inland Revenue. To do this click on Settings, then Inland Revenue:



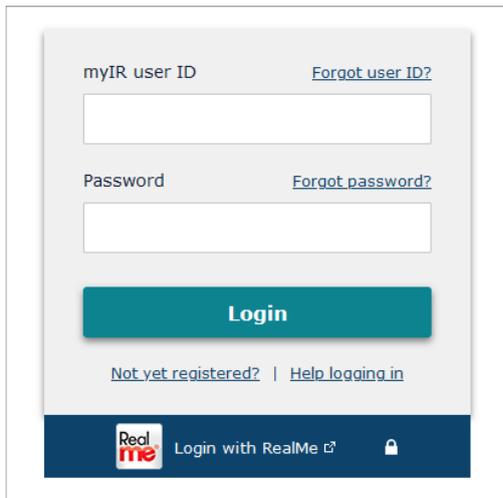
Then click Add, and select "Inland Revenue Application Gateway" from the list:



Give the connection a name, and click "Confirm":



This will take you to the login form for the Inland Revenue’s myIR portal. Enter your myIR credentials and click Login:



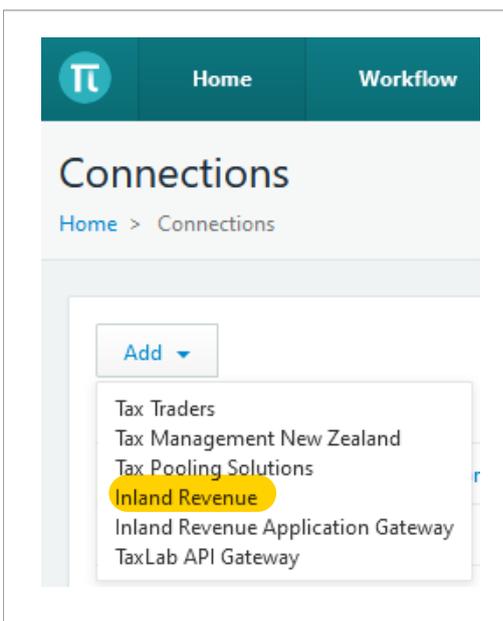
The screenshot shows a login form for the myIR portal. It features two input fields: 'myIR user ID' and 'Password'. Each field has a corresponding link: 'Forgot user ID?' and 'Forgot password?'. Below the fields is a prominent teal 'Login' button. At the bottom of the form, there are links for 'Not yet registered?' and 'Help logging in'. A dark blue footer contains the 'RealMe' logo and the text 'Login with RealMe' with an external link icon.

You have now established the link with Inland Revenue. You’ll be taken back to the Taxlab Connections page, but you’ll be able to see the Inland Revenue connection that you just authorised in the Connections table.

Step 3: Specify the client list that you want to access

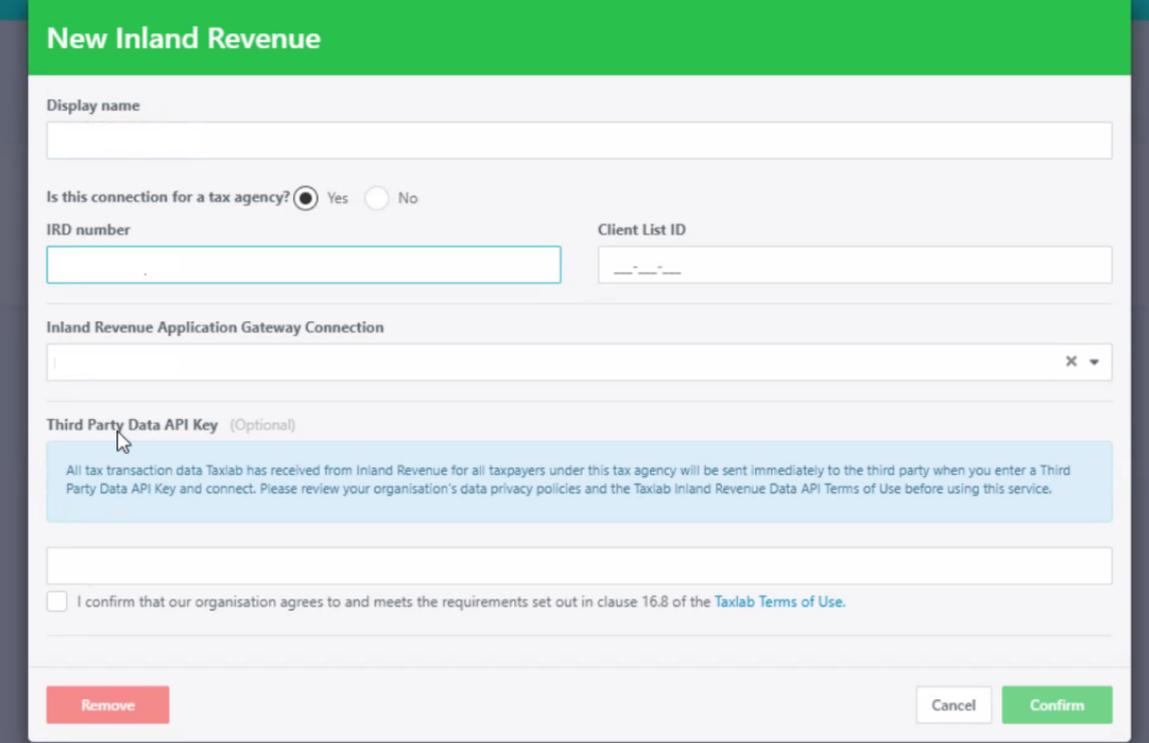
The final step tells the system what data you want to obtain from Inland Revenue and what you want done with it – in this case, transaction data for your taxpayers on your tax agency list, and having that data sent to TaxTraders.

From the Connections page again, click Add, and choose “Inland Revenue”:



The screenshot displays the 'Connections' page in the Taxlab system. The top navigation bar includes a 'π' logo, 'Home', and 'Workflow' tabs. The main heading is 'Connections', with a breadcrumb trail 'Home > Connections'. A blue 'Add' button with a dropdown arrow is visible. The dropdown menu is open, showing a list of connection options: 'Tax Traders', 'Tax Management New Zealand', 'Tax Pooling Solutions', 'Inland Revenue' (highlighted in yellow), 'Inland Revenue Application Gateway', and 'TaxLab API Gateway'.

In the form that appears, you'll have to provide the following five pieces of information:



New Inland Revenue

Display name

Is this connection for a tax agency? Yes No

IRD number

Client List ID

Inland Revenue Application Gateway Connection

Third Party Data API Key (Optional)

All tax transaction data Taxlab has received from Inland Revenue for all taxpayers under this tax agency will be sent immediately to the third party when you enter a Third Party Data API Key and connect. Please review your organisation's data privacy policies and the Taxlab Inland Revenue Data API Terms of Use before using this service.

I confirm that our organisation agrees to and meets the requirements set out in clause 16.8 of the [Taxlab Terms of Use](#).

Remove Cancel Confirm

Display Name

This will be the name of the data connection on the Connections table, e.g. Inland Revenue Data for Tax Traders. If you have more than one client list ID or tax agency list you will need to complete this Step 4 for each list and give each a different display name.

IRD Number

Your firm's Inland Revenue number. This is used to identify which client list ID is associated with your firm.

Client List ID

The number provided by Inland Revenue for your tax agent client list. Refer to the Note 1 on page 7 for how to locate your client list ID.

Inland Revenue Application Gateway Connection

Select the item from the dropdown list that represents the Inland Revenue connection that you created in Step 2.

Tax Traders Key

Enter the key below. Filling out this field signifies to Taxlab that Tax Traders has given you permission to use the Inland Revenue data feed integration.

Cut and paste the following: 7609b947-60b6-4a16-a5d4-a669104b7d58

Taxlab Inland Revenue Data API Terms of Use

Tick the box to confirm you have read these terms of use and can abide by them.

Step 4: Activating data for taxpayers

Please email team@taxtraders.co.nz and:

1. Let us know you have completed the setup process.
2. Include the client list ID from Step 3. We need this to complete the data access loop (Note 1)
3. Include a copy of latest template form of your "Authority to Act" and/or "Client Engagement Letter" and referencing the paragraphs that allow you to share client information with third parties. We've included some examples of terms that Inland Revenue considers acceptable. If your terms don't appear terms appropriate, we will email you and request amendments (Note 2)
4. Let us know which taxpayers to activate. We will activate IRD data for all or some of your taxpayers based on whether you:
 - a) Confirm **all** your clients have accepted the terms you provided for 3. above, or otherwise provided consent for us to hold their data, or
 - b) Provide us with details of the **specific clients** who have accepted the terms you provided under 3. above or have otherwise provided consent.

There are several ways you could advise us of your specific clients. For example, you could email us with a list of authorised clients' IRD numbers, or simply state you have authorisations for all the clients already on our portal or let us know of the IRD numbers of those clients who have not accepted the terms.

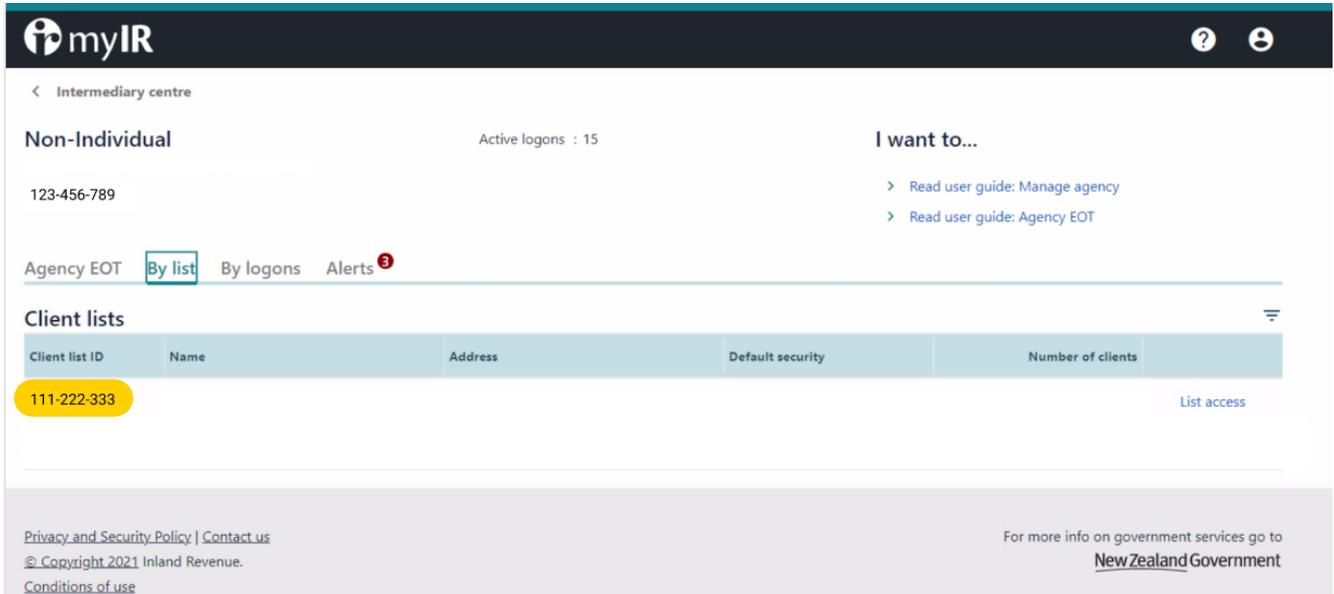
IRD has reserved the right to review copies of the consents you hold for your clients.

When you add new clients, you will be asked to confirm you hold the authorisation to access IRD data. Once again, you will be able to send your clients the email and authorisation link so that they can approve the sharing of their data without updated terms being signed.

We will check with Taxlab to confirm that data is flowing as expected and confirm to you within 7 days. Once the data is flowing you will see the new combined position report displayed on your client's dashboard.

Note 1: How to locate your client list ID

1. Log in to your tax agency account on MyIR
2. Go to Intermediary Centre | Manage agency | By list



The screenshot shows the myIR Intermediary Centre interface. At the top, there is a navigation bar with the myIR logo, a help icon, and a user profile icon. Below the navigation bar, the page title is 'Intermediary centre'. The main content area is divided into sections. On the left, there is a 'Non-Individual' section with the number '123-456-789'. On the right, there is a 'I want to...' section with two links: 'Read user guide: Manage agency' and 'Read user guide: Agency EOT'. Below these sections, there are tabs for 'Agency EOT', 'By list' (which is highlighted), 'By logons', and 'Alerts' (with a notification icon). The 'Client lists' section is displayed below the tabs, showing a table with columns for 'Client list ID', 'Name', 'Address', 'Default security', and 'Number of clients'. The first row in the table has the client list ID '111-222-333' highlighted in a yellow box, and a 'List access' link is visible to the right of the row. At the bottom of the page, there is a footer with links for 'Privacy and Security Policy', 'Contact us', and 'Conditions of use', along with copyright information for Inland Revenue and a link to the New Zealand Government website.

Note 2: Terms for sharing information IRD considers appropriate

We've included two examples below of terms IRD has advised us are appropriate for sharing client tax information through this connection:

We authorise you to furnish to any third party, financial information of mine/ours as you see fit that is requested in furtherance of our business activities.

We may utilise the services of third parties, including tax pooling intermediaries, from time to time and as separately notified to you to manage your tax affairs. To perform the services, we provide these third parties with access to your data to the extent this is required to perform the services. This requires information being sent to these services providers in accordance with our Privacy Policy [Insert any specific requirements arising if relevant to your service agreement with an accounting service provider.]