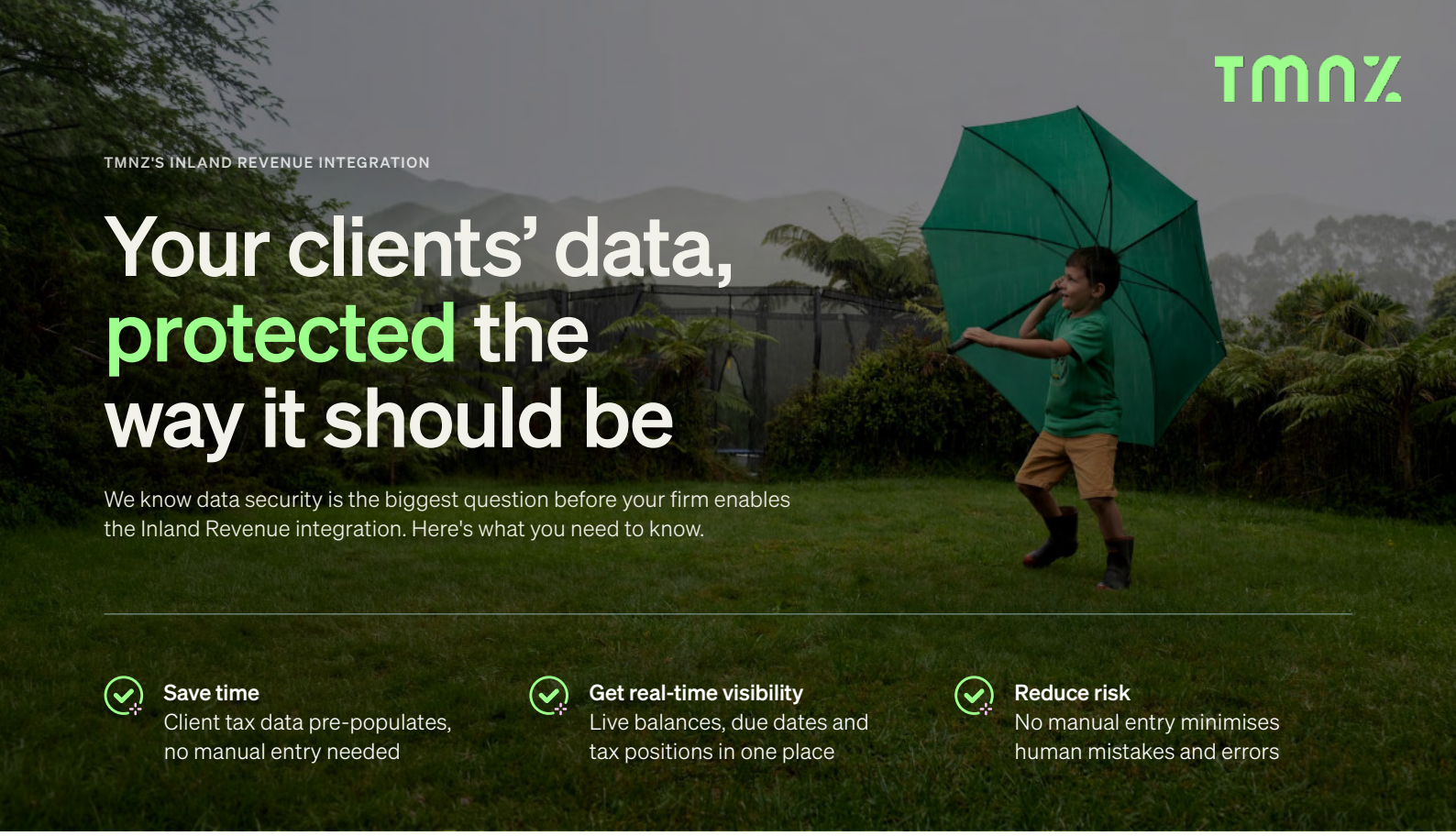
TMNZ'S INLAND REVENUE INTEGRATION

Your clients' data, protected the way it should be



We know data security is the biggest question before your firm enables the Inland Revenue integration. Here's what you need to know.

Save time
Client tax data pre-populates, no manual entry needed

Get real-time visibility
Live balances, due dates and tax positions in one place

Reduce risk
No manual entry minimises human mistakes and errors

How connecting works

1. **Log in**
   Enter your Tax Agent ID and Client List ID
2. **Authenticate**
   Confirm access on Inland Revenue's myIR portal
3. **Choose clients**
   Toggle all, or select individually – you control
4. **Data flows**
   Instant positions appear on your dashboard

How your data is protected

- **Inland Revenue security**
  The Operational Security Framework is mandatory for all Digital Service Providers.
- **Regular audits**
  Yearly audits, plus full recertification every 3 years.
- **Breach notification**
  TMNZ must notify Inland Revenue of any security or data privacy breach, and any affected parties under the Privacy Act 2020.

TMNZ uses the official Inland Revenue gateway services connection – the same channel used by all approved Inland Revenue Digital Service Providers.

You stay in control

- **Your myIR login stays with you.** Your firm authenticates directly. TMNZ never stores your myIR username or password.
- **You choose which clients to connect.** Select clients individually or sync all. It's your call.
- **Our access is limited.** Only the account data you can already see as their tax agent.
- **Manage your connection from your dashboard.** Update your connection settings anytime.

FAQs

Do you retrieve data for clients we haven't authorised?
No. Data only flows for clients you've toggled on.

Does TMNZ hold our clients' data?
We store only the Inland Revenue account data retrieved for clients you've authorised, protected under Inland Revenue's Operational Security Framework.

What is actually retrieved?
Only Inland Revenue account data – balances, account types, due dates and transactions.

Do we need to update our letter of engagement?
No. No changes to your letter of engagement are needed.