



1. Your business name

2. Your business IRD number

(8 digit numbers start in the second box. 1 2 3 4 5 6 7 8)

The number you use to complete your clients' returns

3. Your business postal address

Street address or PO Box number

Suburb, Box lobby or RD

Town or city

4. Contact person

Contact person's position or title

Contact numbers

Business

Fax

Email address

5. Name of the E-File software package you expect to use

Do you currently E-File?

☐

Yes

☐

No

If yes, and you want to transfer your encryption details to or share them with your new account, enter the IRD number

6. Declaration

I have read and understood the E-File terms of reference and agree to fulfil my obligations as an E-File user

Name

Position or title

Signature

Date

Scan and email this form to the E-File support team, Efile.team@ird.govt.nz

Completing returns online using E-File

E-File is a free service for intermediaries which lets you file your clients' returns online.

To start using E-File you'll need to be:

- connected to the internet
- running Inland Revenue approved software
- connected to a printer and
- registered to use the E-File service.

To register for E-File, complete this form and send it to our E-File team and we'll send you an encryption key.

E-File software

You'll need approved software to use E-File. We don't endorse any particular package or supplier. For a full list of certified E-File software suppliers, go to "Getting started with E-File" at www.ird.govt.nz/taxagents/manage/efile

Your software supplier is responsible for providing you with training and support to use their software package.

Using E-File

Once you're set up you can send the following electronically:

- IR3, IR3NR, IR4, IR6, IR7, IR8, IR9, IR215, IR526 tax returns
- GST returns
- correspondence, including attachments with returns
- updates to your client details, eg, change of address
- requests for forms and guides.

You can request and confirm PTSs, receive debt letter reports, summary of income reports and your client lists.

E-File security

The E-File system has a high level security design to protect the confidentiality of your clients' data. Your encryption key and software password provide additional security.

Note: It's important that you read and agree to the terms of reference and sign the declaration on this form. You can find the terms of reference at www.ird.govt.nz (keywords: terms of reference).

For more help

For more information about E-File go to www.ird.govt.nz/taxagents/manage/efile or contact the E-File support team:

Phone: 0800 433 4533

Email: Efile.team@ird.govt.nz

Privacy

Meeting your tax obligations means giving us accurate information so we can assess your liabilities or your entitlements under the Acts we administer. We may charge penalties if you don't.

We may also exchange information about you with:

- some government agencies
- another country, if we have an information supply agreement with them
- Statistics New Zealand (for statistical purposes only).

If you ask for the personal information we hold about you, we'll give it to you and correct any errors, unless we have a lawful reason not to. Call us on 0800 775 247 for more information. For full details of our privacy policy go to www.ird.govt.nz (search keyword: privacy).