

Customer Engagement Strategy Team November 2017

September 2016

 launch of Jobs and Pensions service for customers with access via myAccount

Technical constraints to providing agent access via ROS

Particularly unknown customers e.g. SARP employee

Need to facilitate

- Parity of service for customers and agents
- Agent management of <u>all</u> tax affairs on behalf of their client



- Representations made on behalf of agents for access
 - 650K PAYE Employees engage an agent to manage their tax affairs

Strong focus within Revenue on overcoming technical constraints

- 25th November 2017
 - launch of Agent access to Jobs and Pensions
- Available in Revenue's Online Service (ROS)



What can you do for your client?

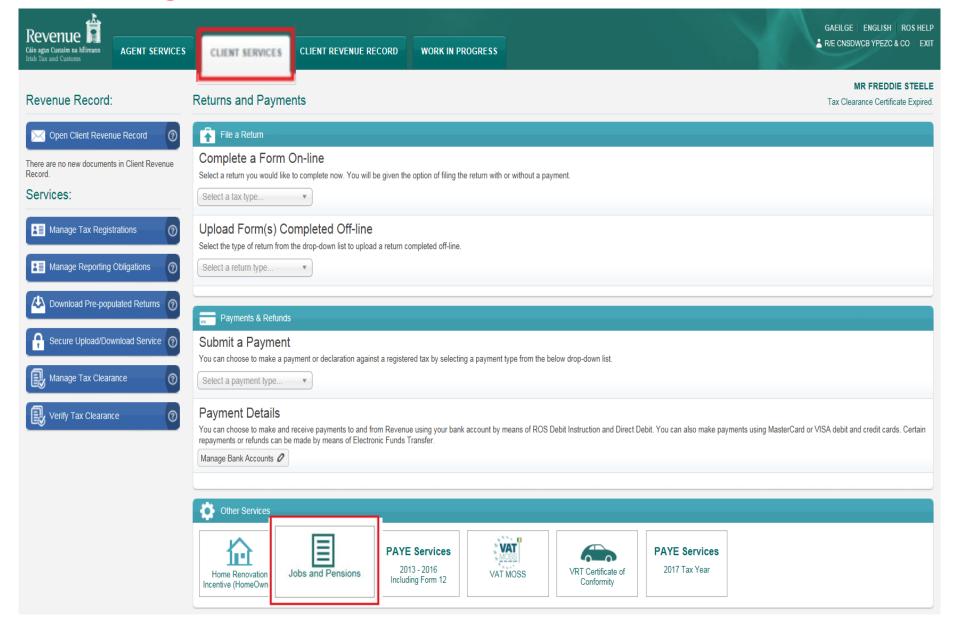
- Ability to register:
 - First ever job in Ireland
 - A change in job
 - A second or subsequent job
 - An occupational pension
 - Payment from a private pension



Agent Access to Jobs and Pensions Service How can you access the service?

- Immediately!
 - Any current client that has a PAYE registration <u>and</u>
 - A client/Agent 'link' exists
 - Client Services Tab in ROS
 - Jobs and Pensions Card in 'Other Services' section





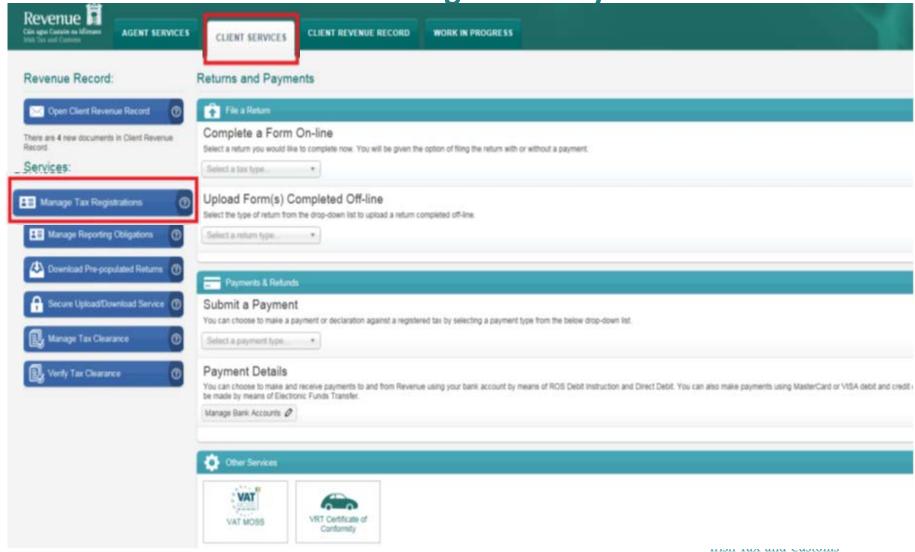
Agent Access to Jobs and Pensions Service How can you access the service?

Client with no PAYE Registration but starting a job/pension

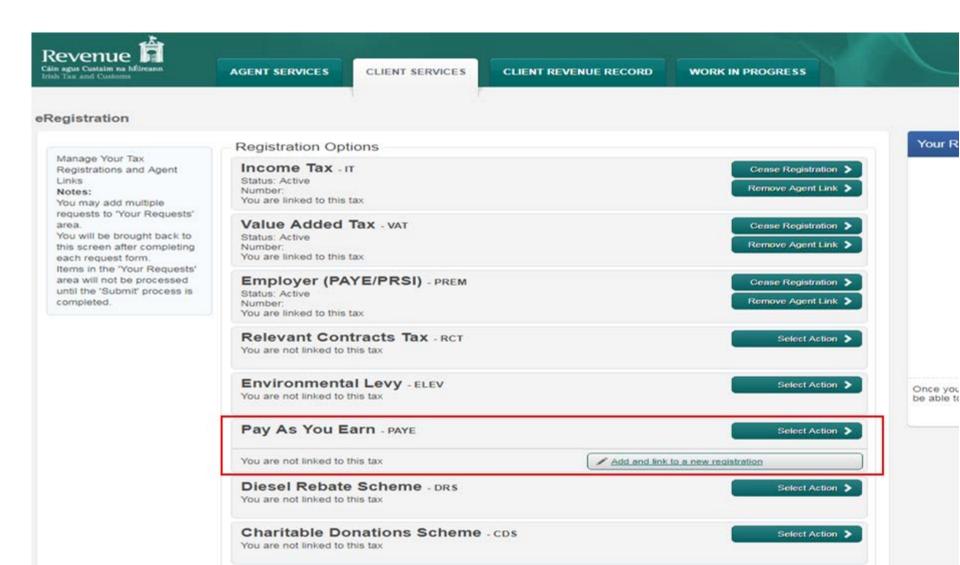
- A current client that is registered for some other tax registration
- Client/Agent 'link' to Income Tax, VAT etc. exists
- 'Manage Tax Registrations' (eReg) service extended to allow you to add a PAYE registration
- New registration processes within 2 working days
- Client Services Tab
- Jobs and pensions Card in 'Other Services' section



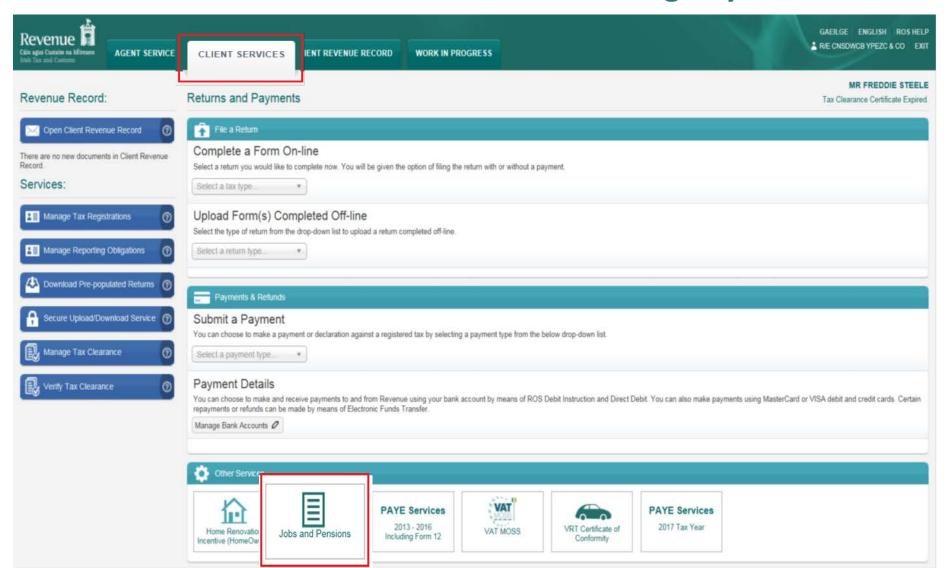
A client that has no PAYE registration yet



Adding a PAYE registration



Jobs and Pensions access within 2 working days



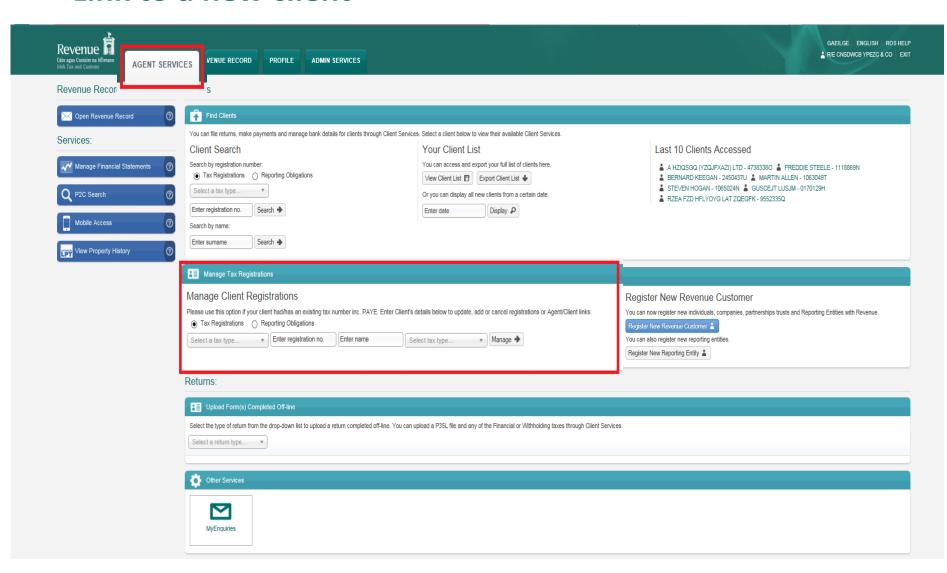
Agent Access to Jobs and Pensions Service How can you access the service?

For a new client

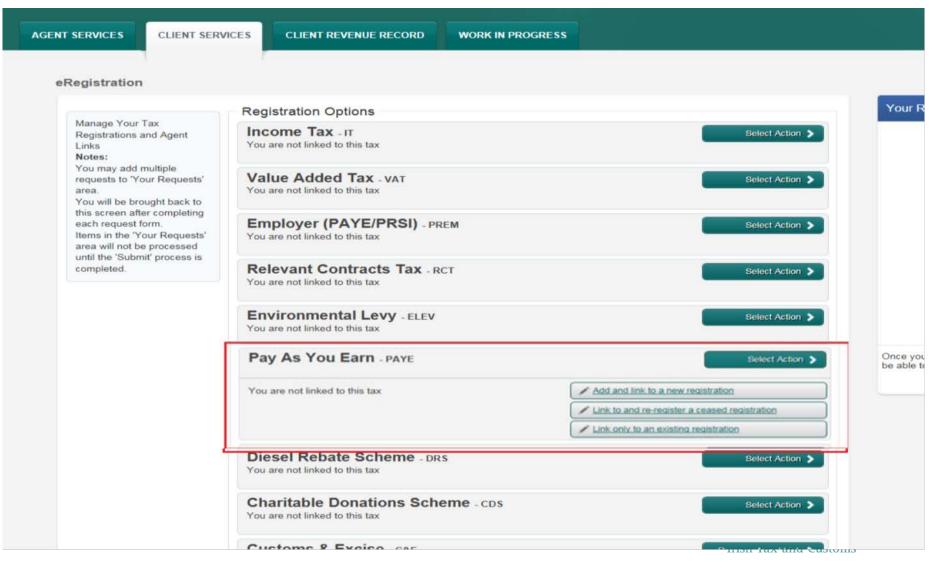
- Individual known to Revenue
- Client/Agent link needs to be created
- Agent Services > Manage Tax Registrations
- eRegistrations service will allow you to
 - 1. Link to an existing PAYE registration
 - 2. Add and link to a new PAYE registration
- Link/New registration processes within 2 working days
- Client Services Tab
- Jobs and pensions Card in 'Other Services' section



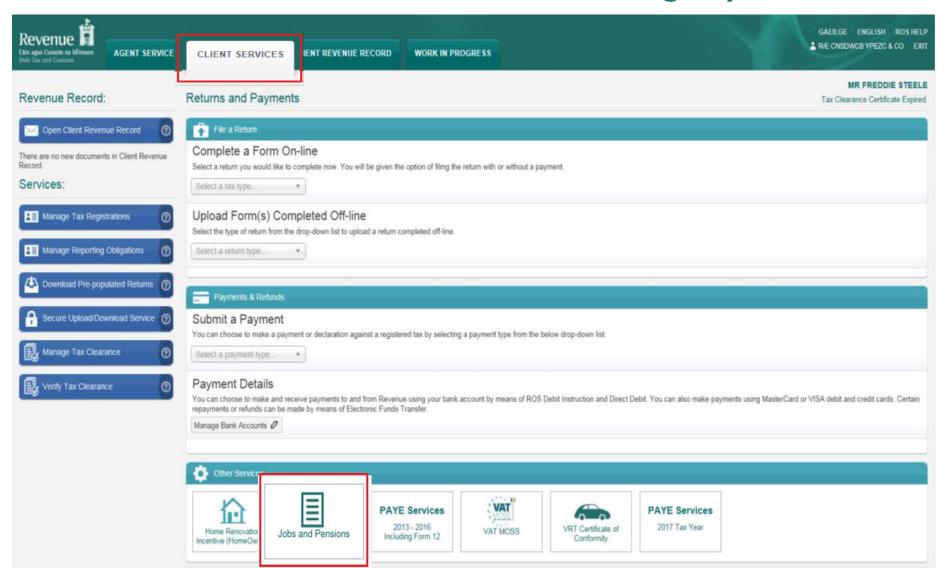
Link to a new client



Link to a new client



Jobs and Pensions access within 2 working days



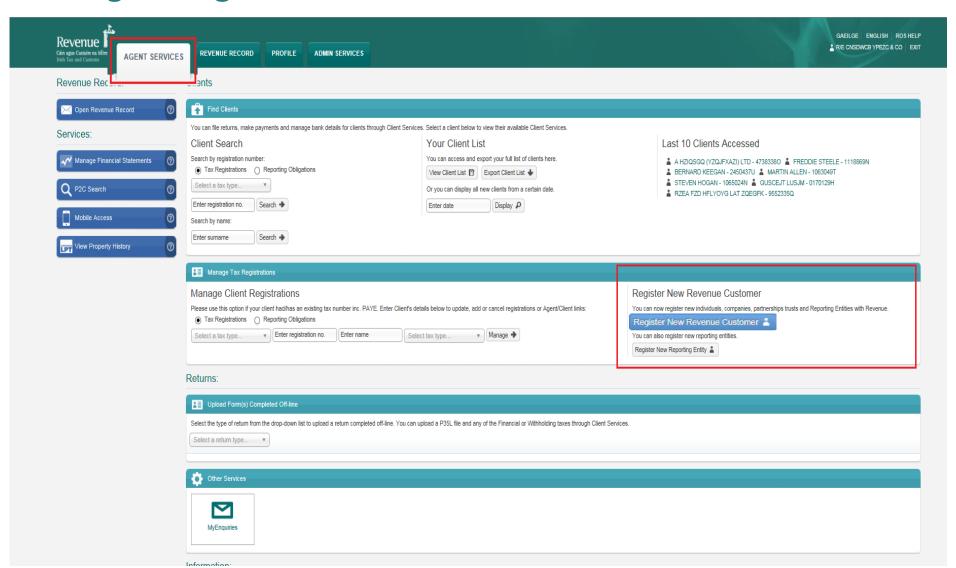
Agent Access to Jobs and Pensions Service How can you access the service?

A client who has just arrived in Ireland

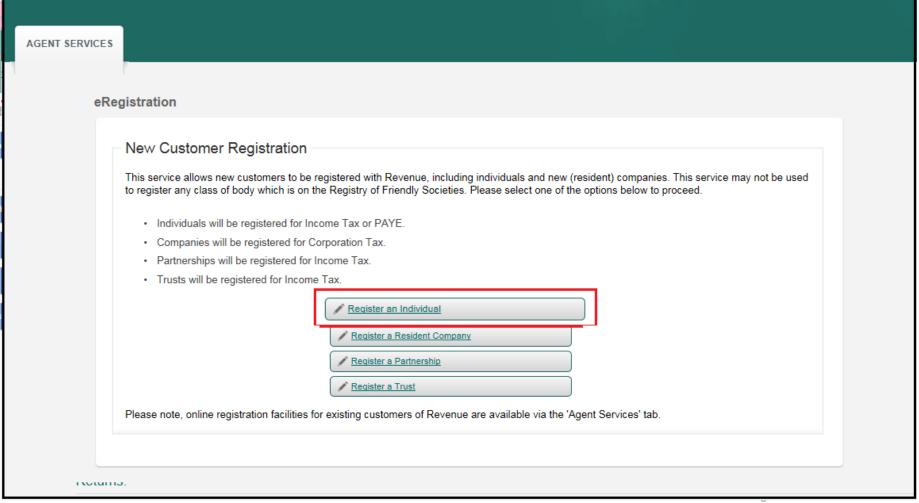
- Never worked in Ireland
- No Revenue record
- For example: SARP employee
- Agent Services > Register New Revenue Customer
- Extended to allow for PAYE Registration
- New registration processes within 2 working days
- Client Services Tab
- Jobs and pensions Card in 'Other Services' section



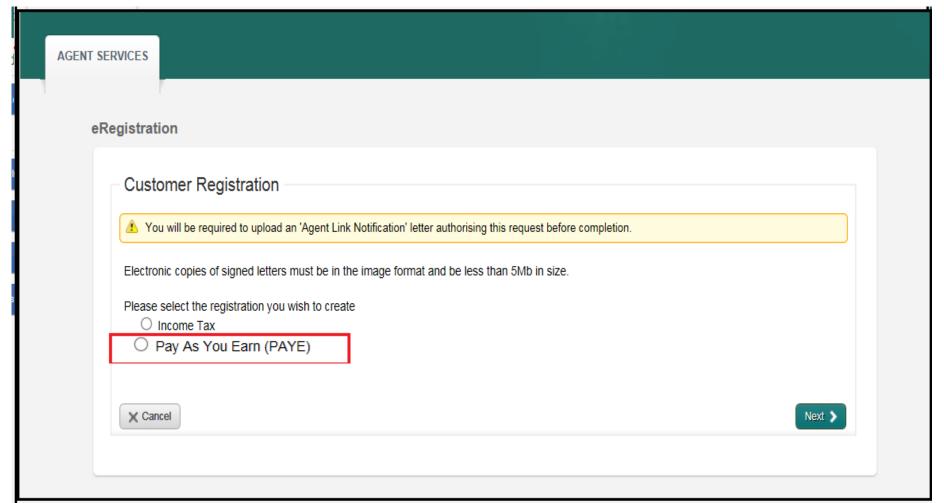
Registering a client that is unknown to Revenue



Registering a client that is unknown to Revenue



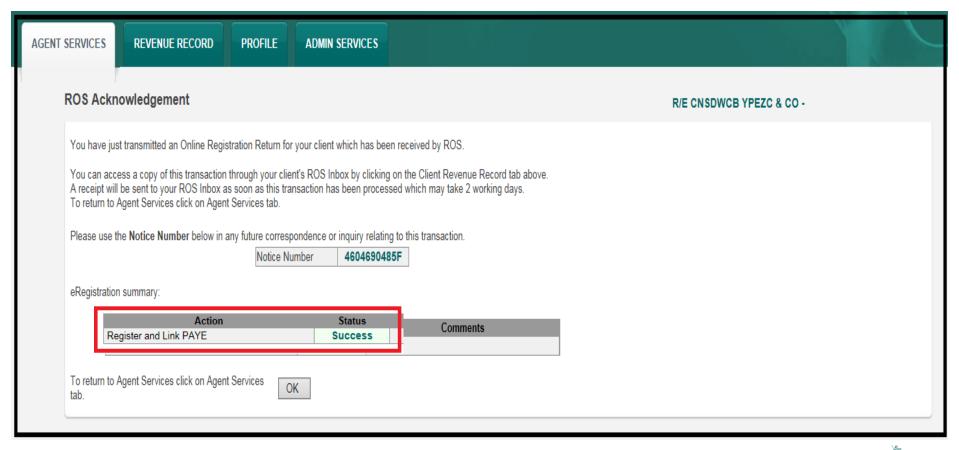
Registering a client that is unknown to Revenue



- Registering a client that is unknown to Revenue
 - 4 steps to complete PAYE registration
 - Client details required
 - PPSN
 - DOB
 - Name
 - Nationality
 - Address
 - Fmail
 - Agent/Client authorisation
 - Generate on screen or
 - Upload from your saved documents
 - Acknowledgement
 - Registration processed with 2 working days

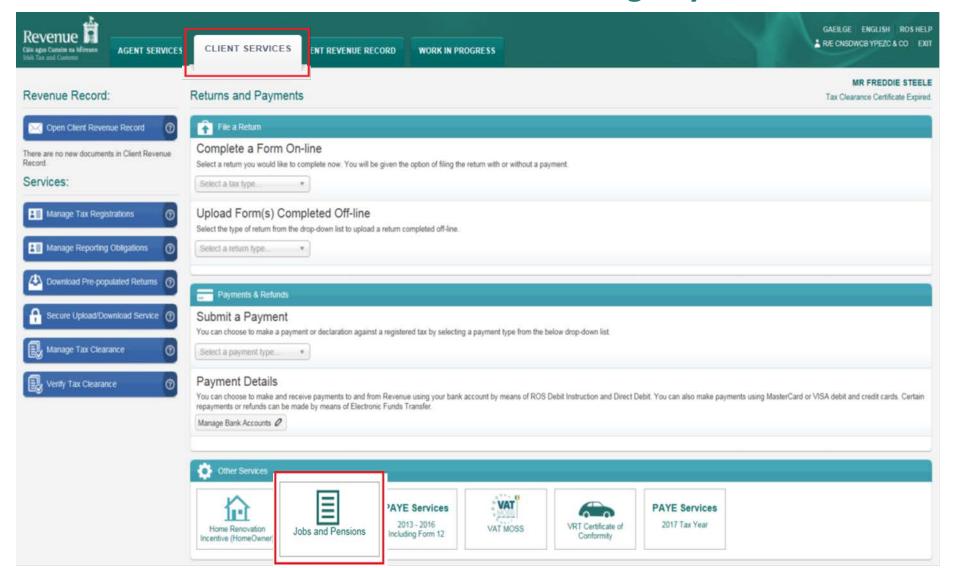


Acknowledgement of new PAYE Registration





Jobs and Pensions access within 2 working days



Agent Access to Jobs and Pensions Service You will need the following information to register a Job or Pension online:

- employer's or pension provider's tax registration number
- start date of new job or pension
- frequency of salary/wage payment/pension
- weekly amount of the following DSP payments if applicable:
 - blind pension
 - carer's income (allowance or benefit)
 - survivor's pension (non-contributory).
- staff or pension number if available



Agent Access to Jobs and Pensions Service Registering a Job

No longer than 10 minutes

Generally quicker

Four Distinct Sections

- 1. Add new job or pension
- 2. Tell us how long your client has been living in Ireland
- 3. Tell us about your client's overall income
- 4. Review details and submit





myaccount

My Documents

Jobs and Pensions

← myAccount home Section 1 of 4

Adding a job or pension



Who is it for?

This service is for anyone who:

- is starting a new job
- is starting to receive payments from a private pension (not a DSP, i.e. social welfare, pension)

Just left or changing a job or pension soon? You should not add a new job or pension until your old employer or pension provider has told us that you have left. If you add your new job or pension before then, it will be treated as a second job or pension.

What do I need?

To add a new job or pension you will need:

- Your new employer or pension provider's tax registration number
- The date your job starts or pension becomes payable and how often you will be paid
- 3 To tell us an estimate of your overall incomes
- If you have recently moved to Ireland, you will need to provide some additional details such as arrival date

How long does it take?

About 10 minutes for most people. Some people may have more or less questions to answer. The sections are as follows:

Section One:

Add your new job or pension

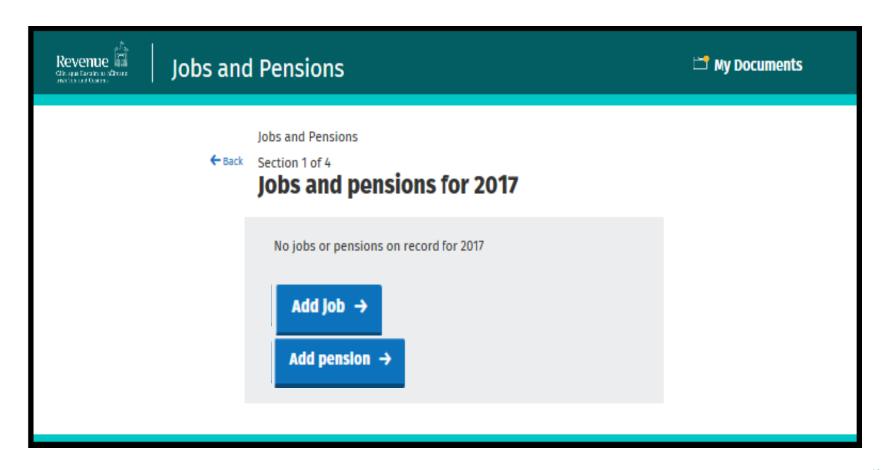
Section Two

Tell us how long you have been living in the Republic of Ireland

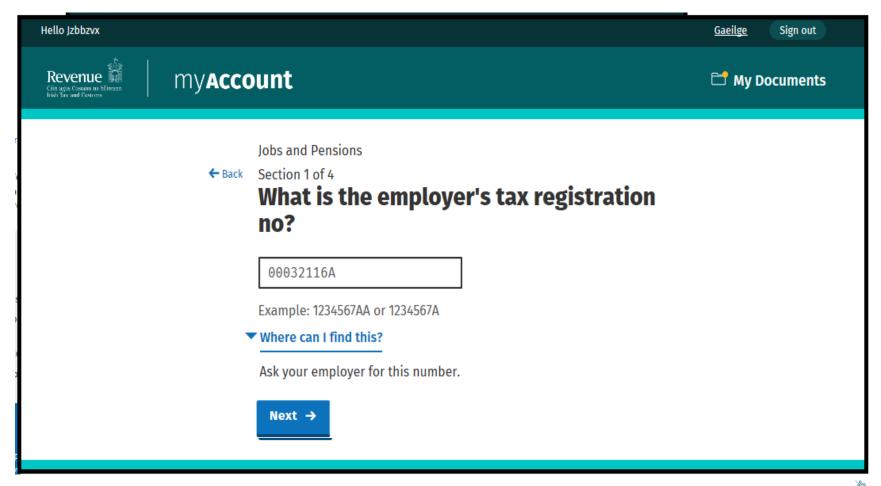
- Section Three:

 Tell us about your overall incomes
- Section Four:

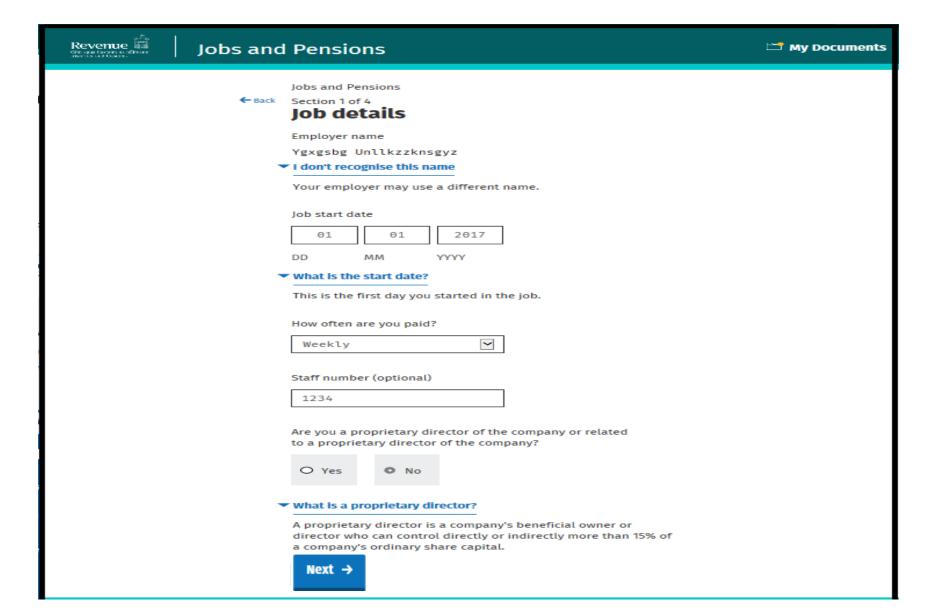
 Review your details and submit

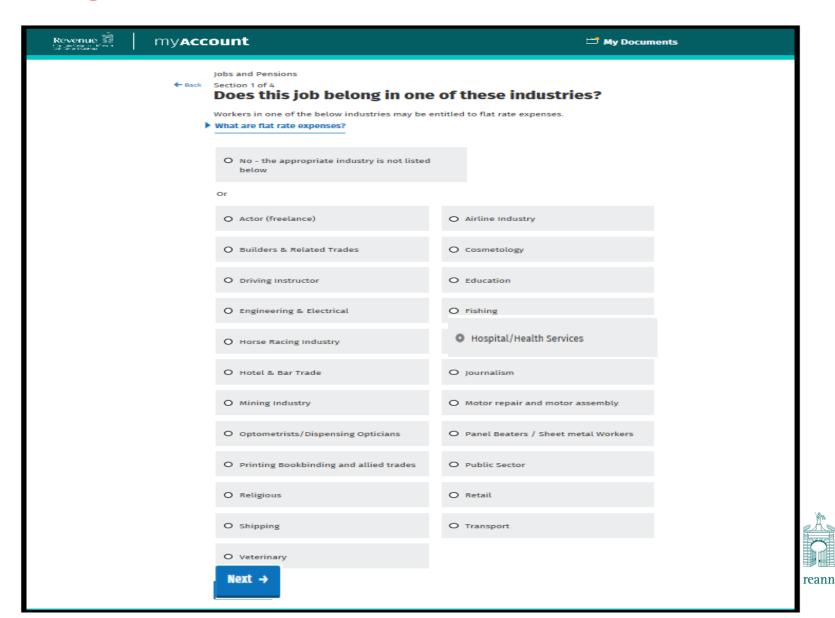


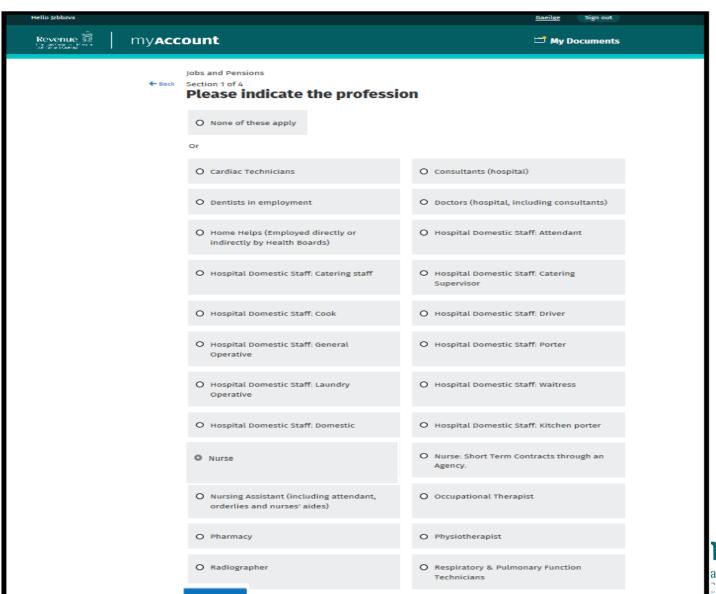






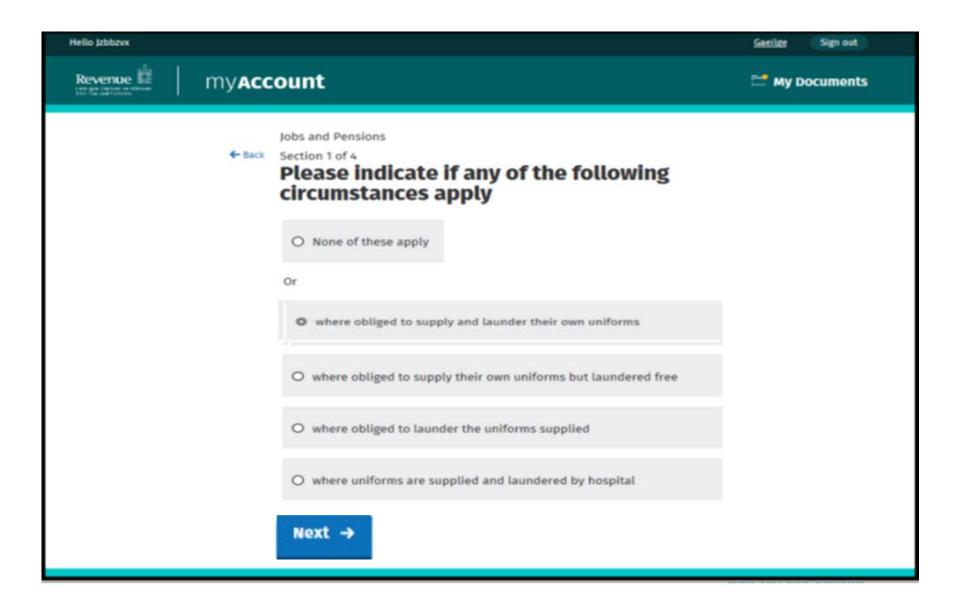


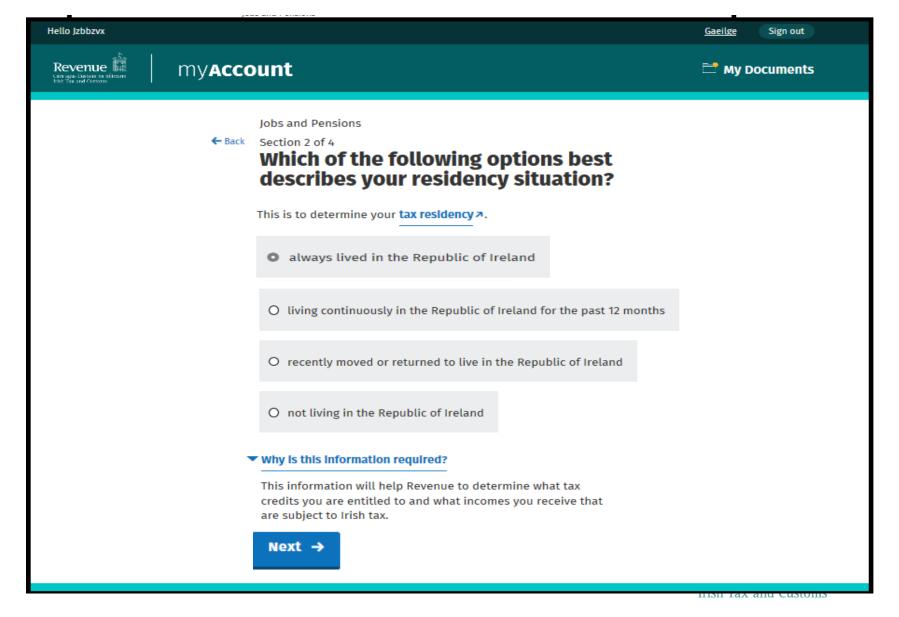


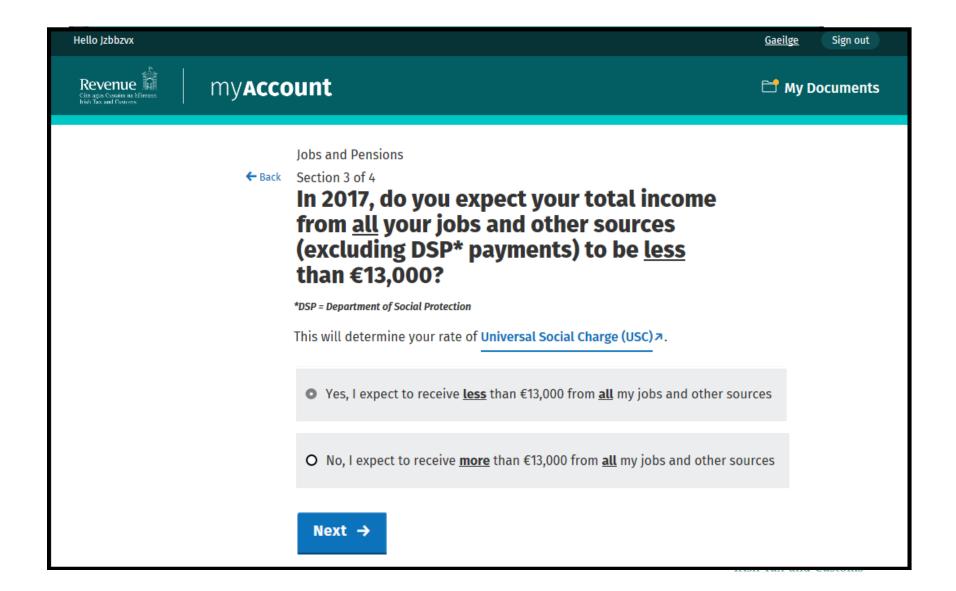


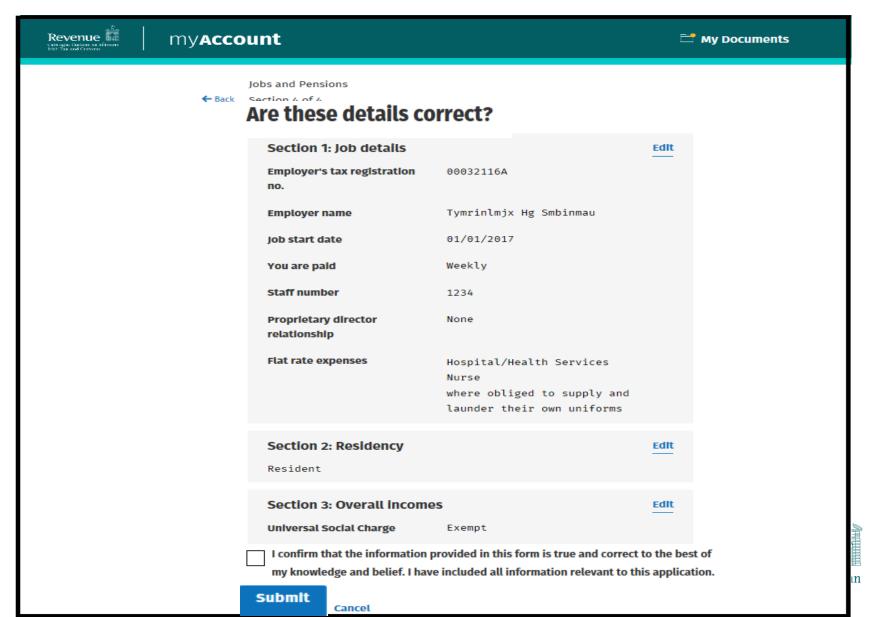
Next →

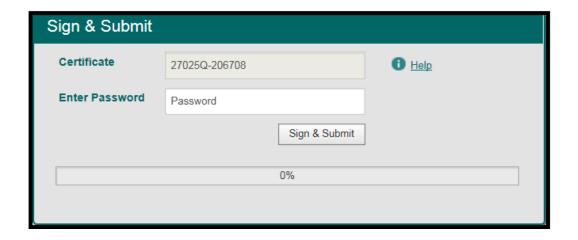




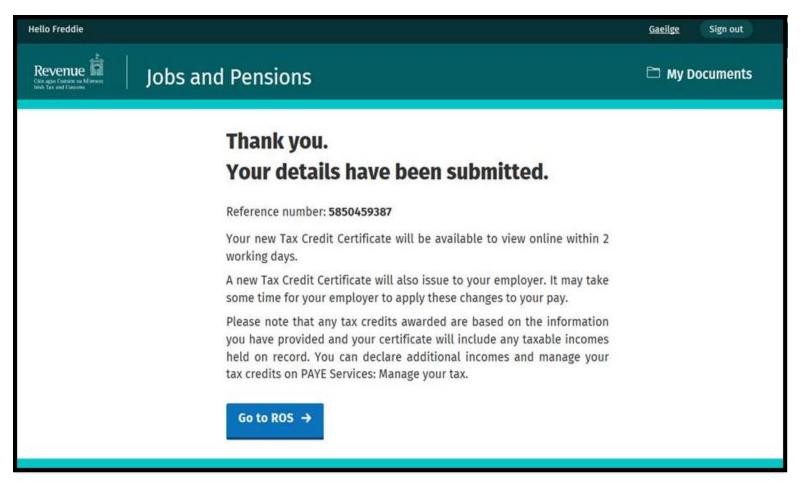




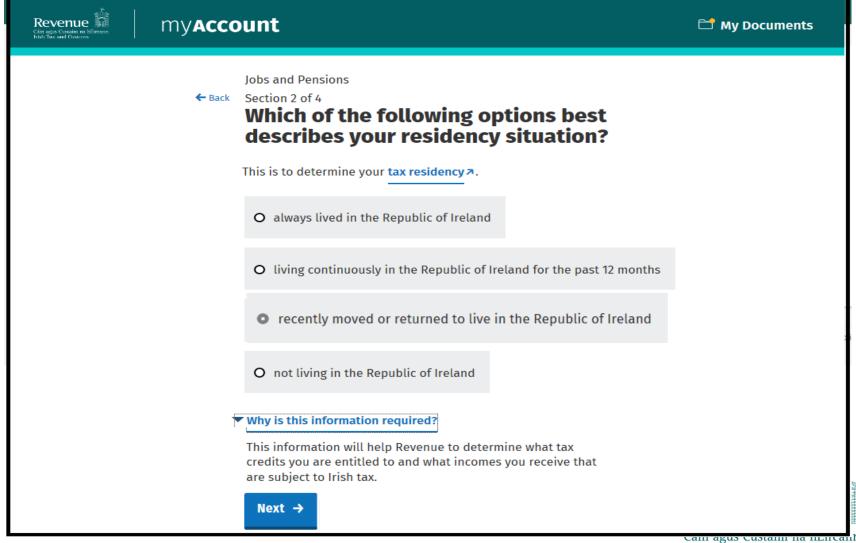


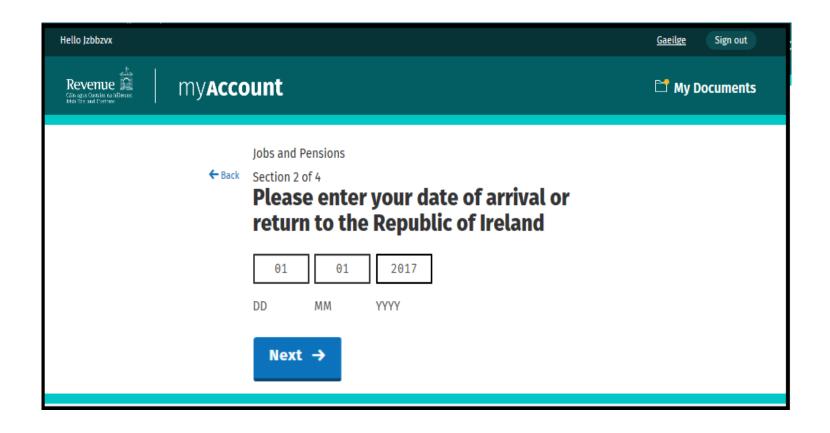




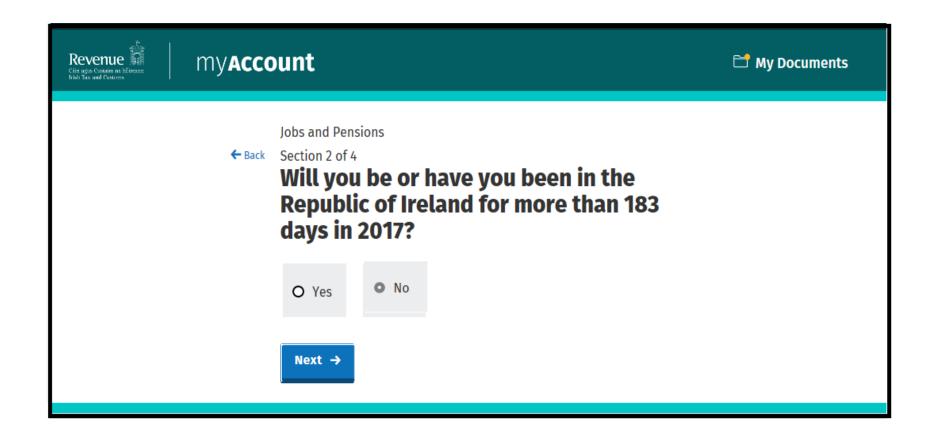




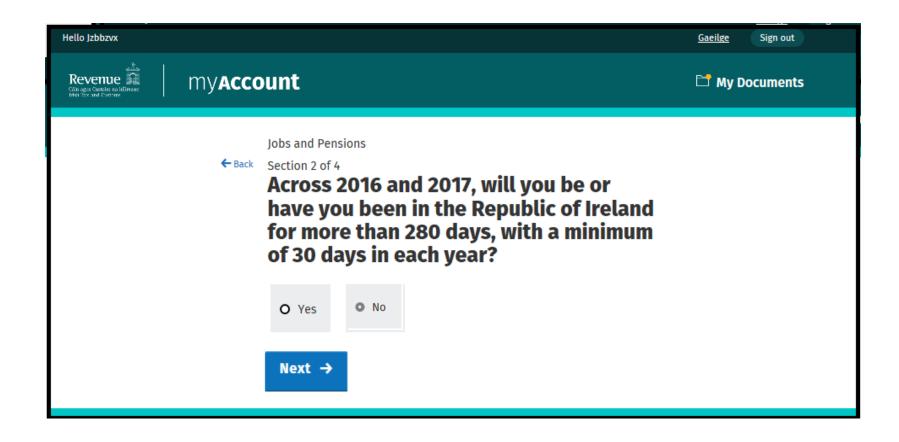




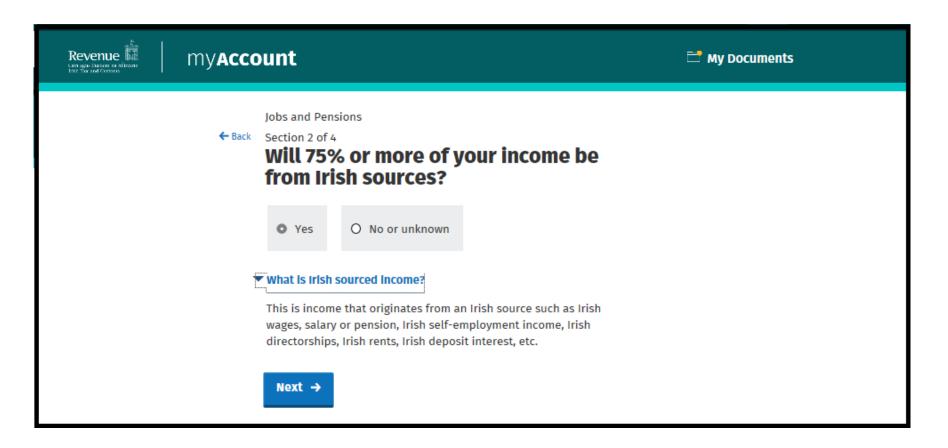














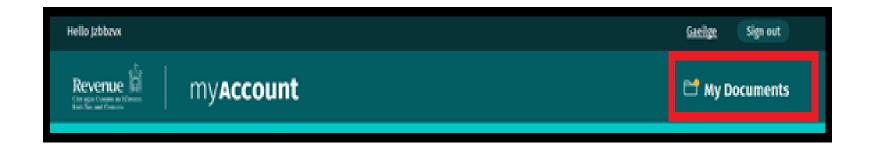
- Flow returns to determine appropriate USC rate
- Review submission details

- Sign and Submit
- On screen confirmation



Tax Credit Certificate (TCC) within 2 working days

- Available in My Documents
 - View, print or download
 - Full archive of all TCC's and End of Year Statements (P21)





- For PAYE Registered customers
- Previously done through PAYE Anytime Profile Screen
- Existing 'Payments and Refunds' section in ROS enhanced to include PAYE Bank details



