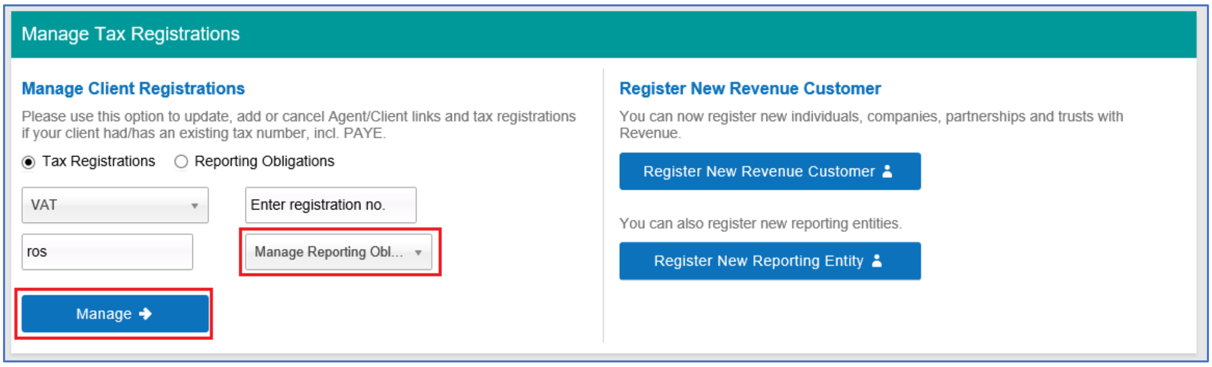
How to Manage Reporting Obligations on ROS - Agents

In order to file for DAC2-CRS, DAC4-CbC, FATCA, DAC6, DAC7, Suspicious Transaction Reports (STR) and Share Schemes Reporting (SSR) the client needs to be registered.

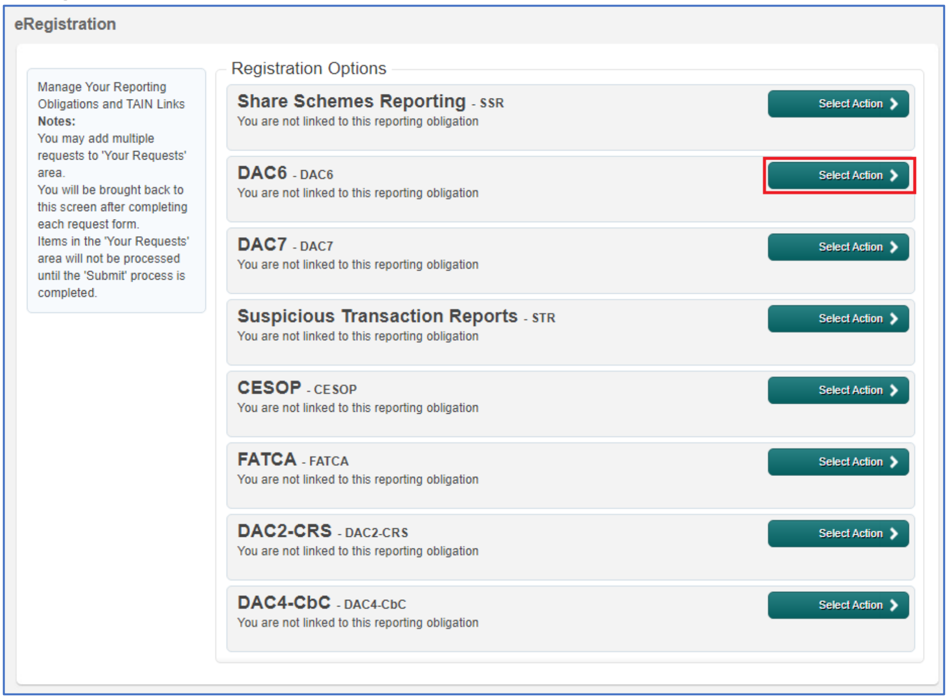
To register a client for a Reporting Obligation (where the client already has an assigned tax or reporting obligation registration number)

- Login to ROS and scroll down to "**Manage Client Registrations**".
- Select a tax or reporting obligation that the client is already registered for, enter the registration number and the client name and select "**Manage Reporting Obligations".**
- Click on "**Manage".**



You will be brought to the e-Registration page.

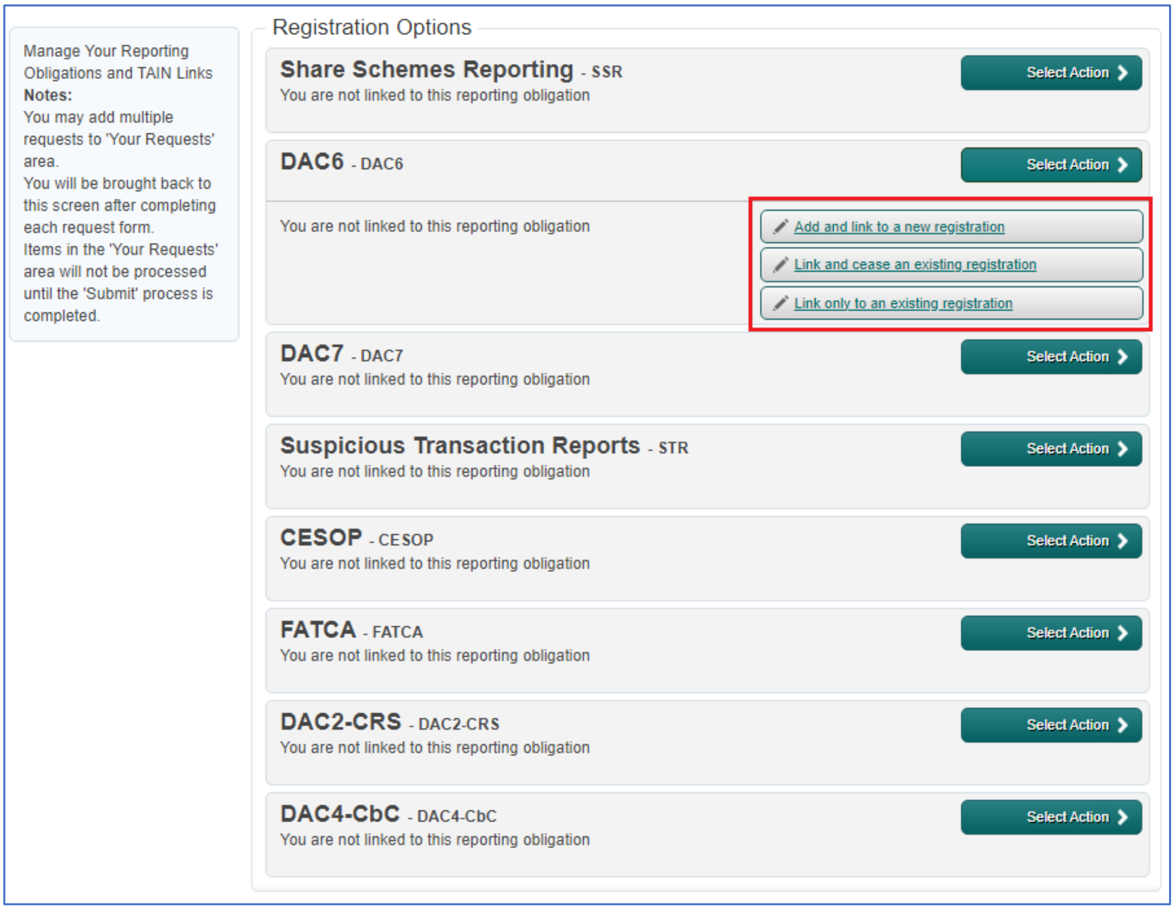
- Click on "**Select Action**" beside the relevant registration option. (In this example we are registering for DAC6).



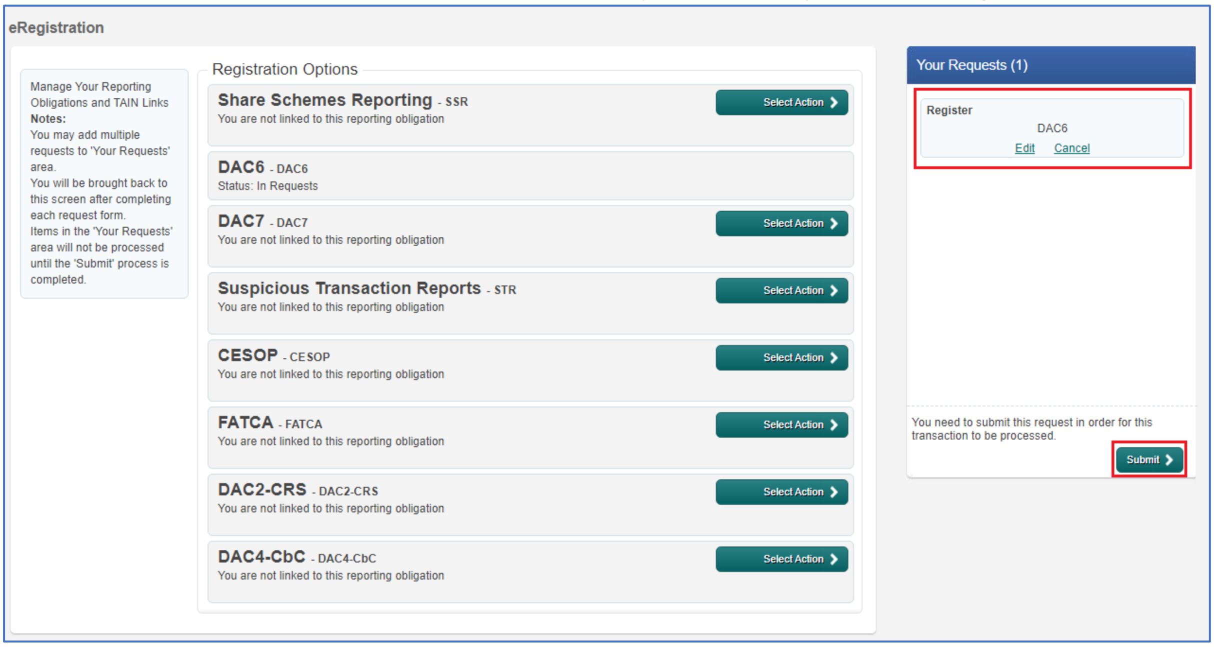
Revenue
Cáin agus Custaim na hÉireann
Irish Tax and Customs

You will be presented with 3 options.

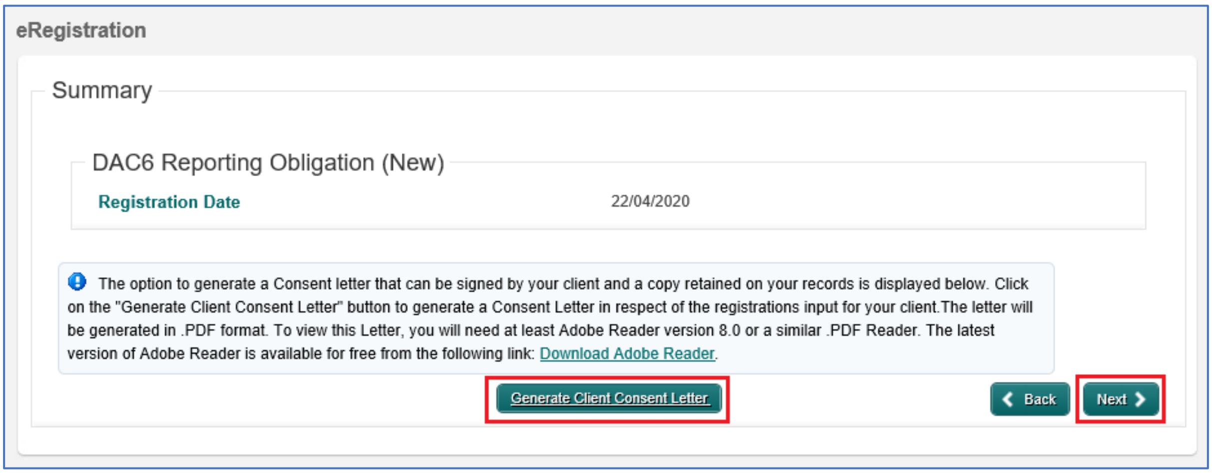
- Select the appropriate action by clicking on the link, check with your client as necessary.



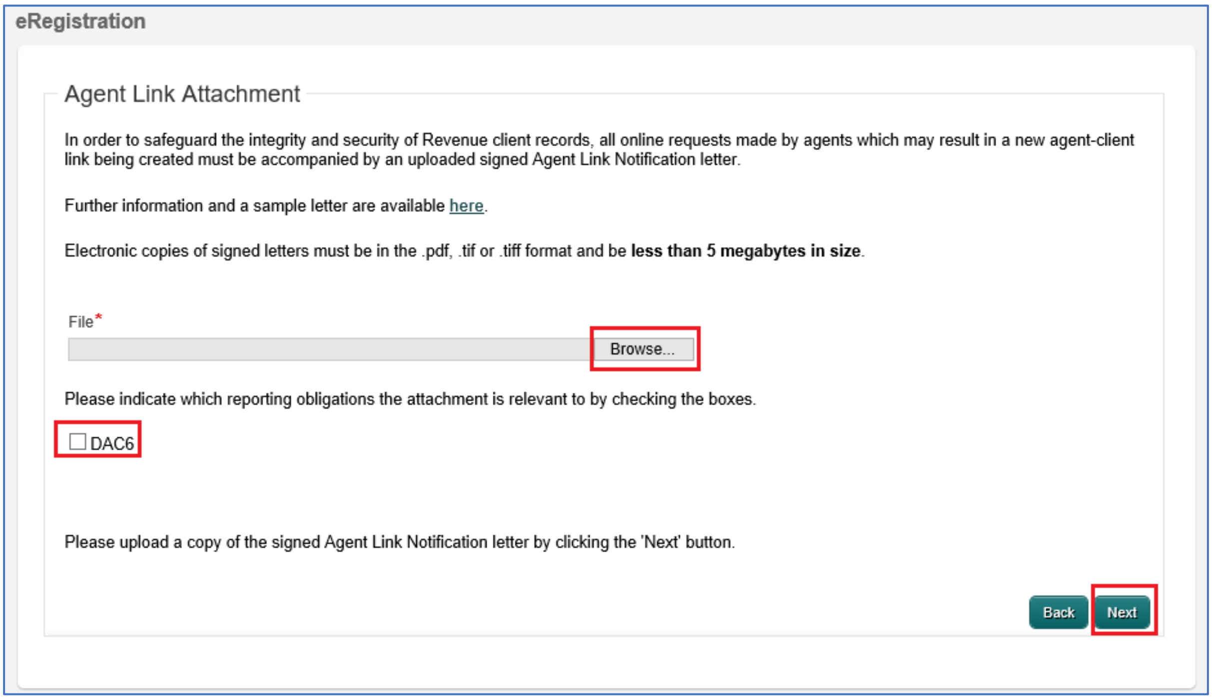
- On the Request Confirmation page click on "**Confirm**" at the bottom of the screen.
- Enter the registration date and click "**Add To Your Requests".** The registration will go to "Your Requests".
- Click on the "**Submit**" button under "Your Requests" in the panel on the right.



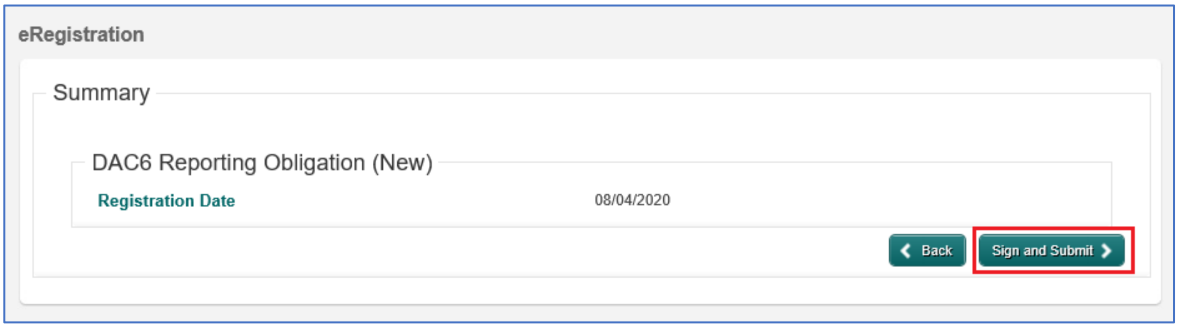
On the eRegistration Summary page you may generate the Client Consent letter (similar to Agent Link Notification letters). The letter should be completed by the agent and signed by the client. This letter should then scanned or photographed and the electronic version (.pdf, .tif or .tiff are acceptable) should be uploaded on the next page. These files need to be under 5 Mb in size to upload successfully to ROS.
Once you have the Client Consent letter saved in a digital format click on “**Next**”.



- Click on “**Browse**” or “**Choose File**” and upload your file. Tick the box to indicate which reporting obligation the Agent Link is in relation to (in this example DAC6). Click “**Next**”.

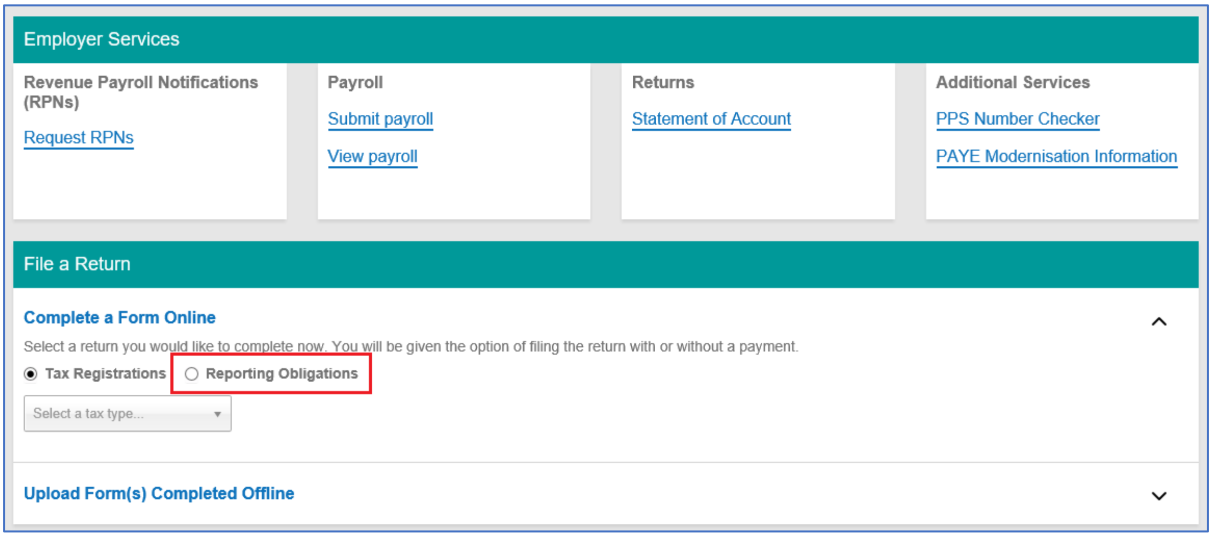


- Click on “**Sign & Submit**” on the bottom of the page.
- On the next page enter your password and click on “**Sign & Submit**”.



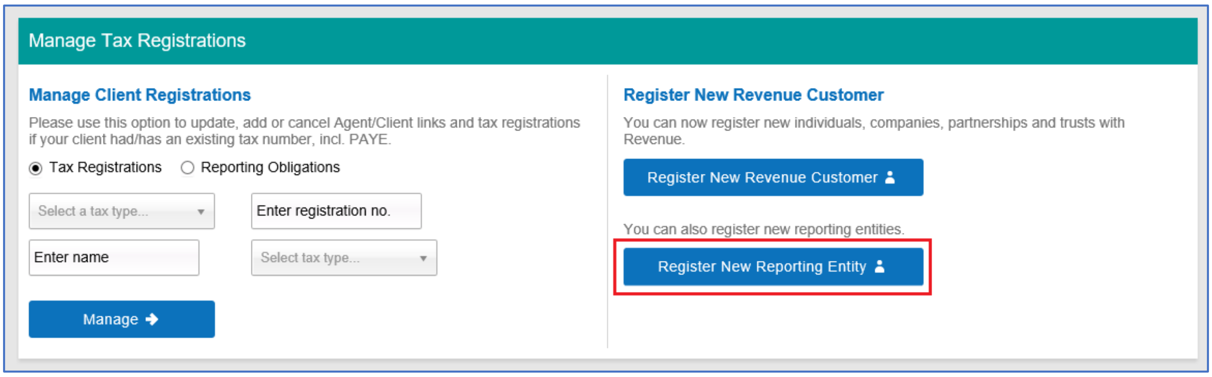
You will receive a ROS Acknowledgement with an eRegistration summary which indicates if the registration/linking was successful.

- Once completed, it may take up to 3 working days for the registration to reflect in ROS.
- You will receive a registration confirmation to your Clients' ROS Inbox .
- Once the first reporting obligation is added, the Reporting Obligation radio button will appear under "**Complete a Form Online**" on the "**Client Services**" page.

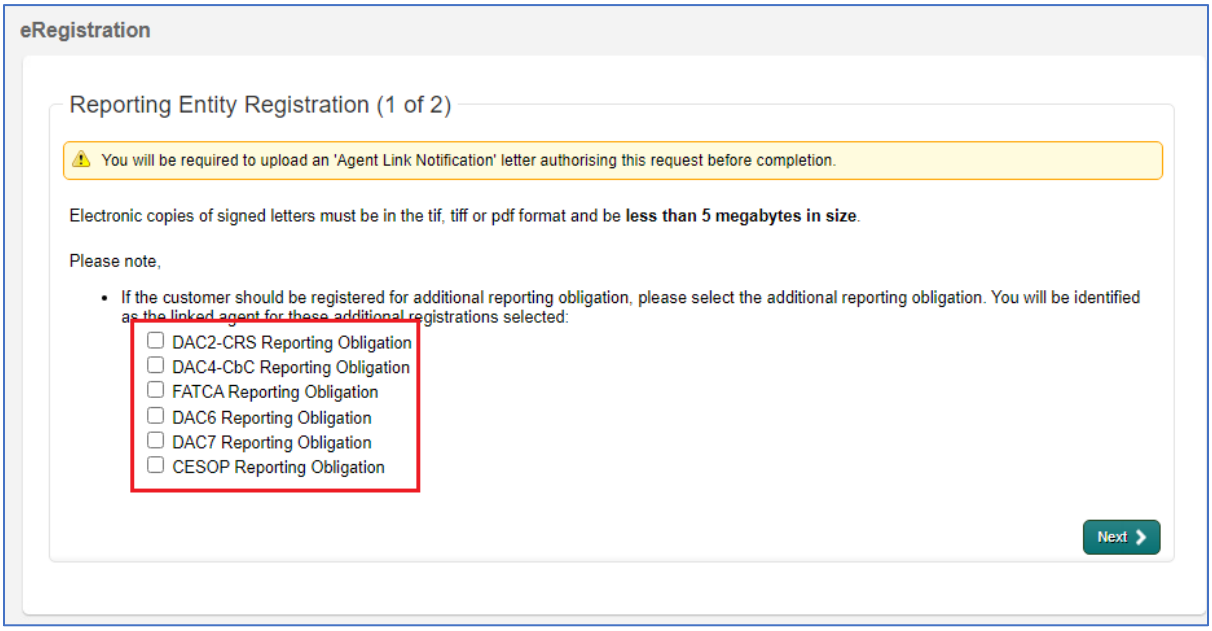


Registering New Reporting Entities

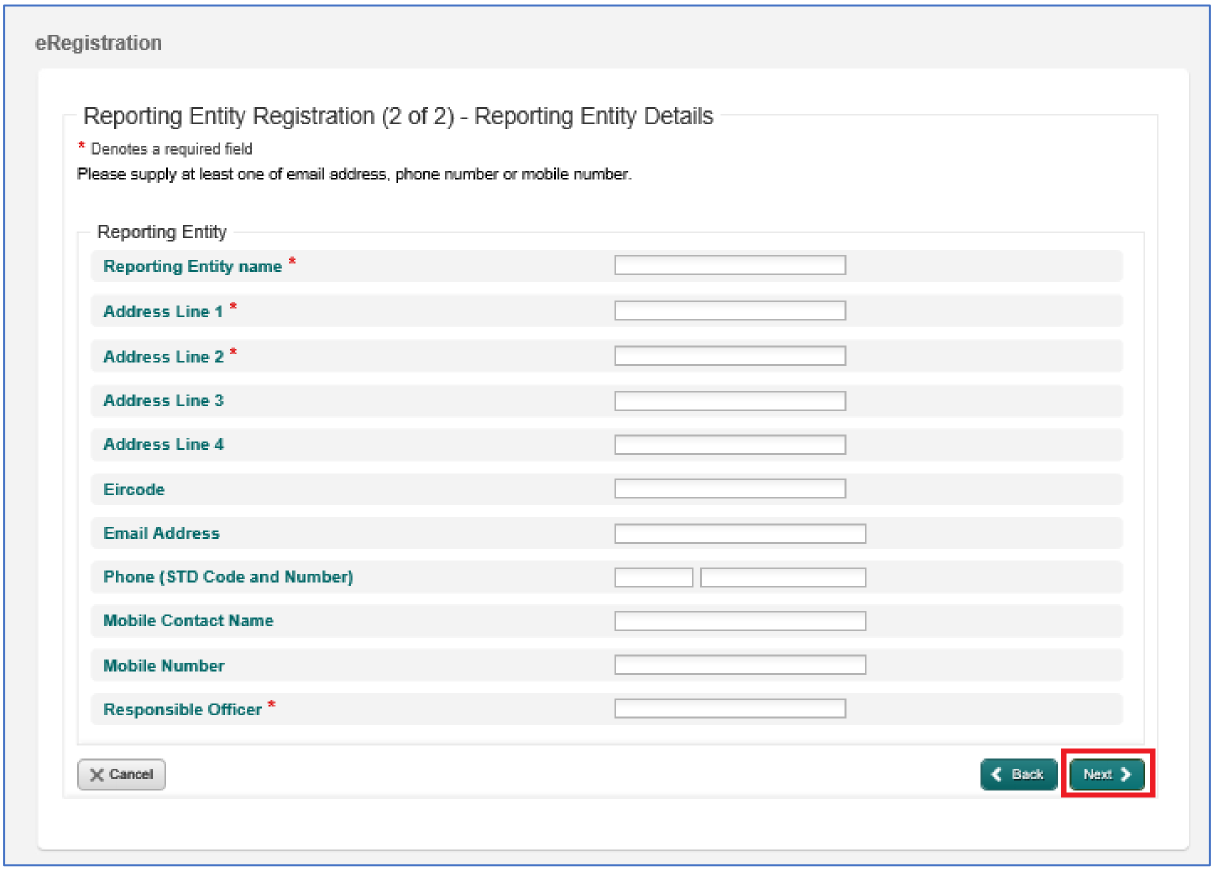
You can also register new reporting entities by clicking on "**Register New Reporting Entities**" on the "Agent Services" screen. To avoid duplicate registrations, please ensure to check that the entity does not already have a tax or reporting number with Revenue.



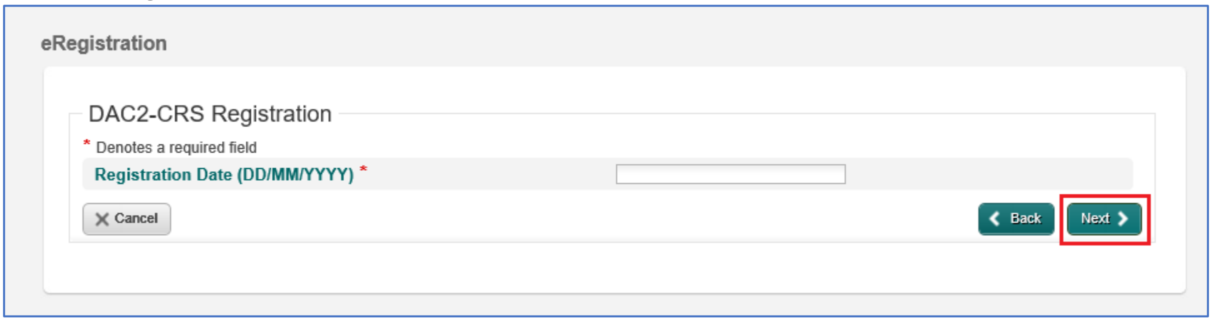
Select the additional reporting obligations as required and click “**Next**”.



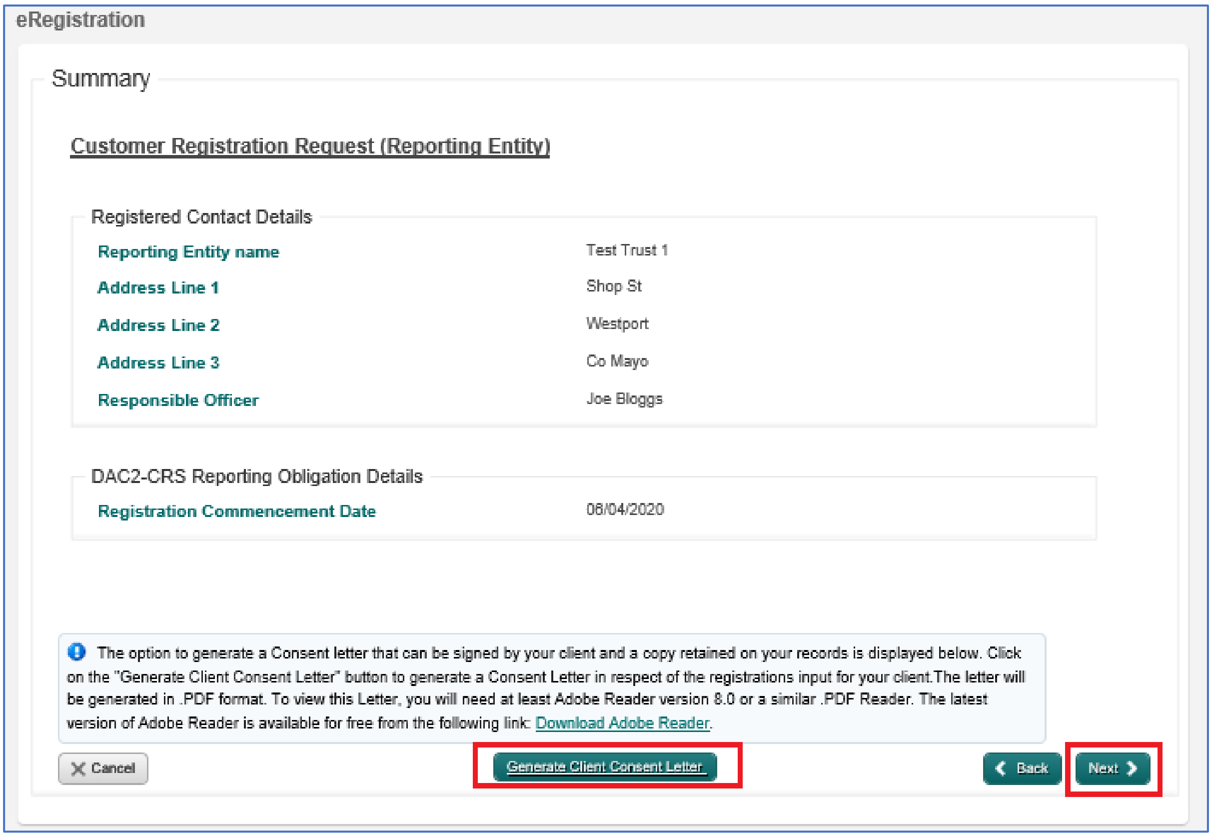
Enter the relevant details and click “**Next**”. (In this example we have clicked DAC2-CRS Reporting Obligation).



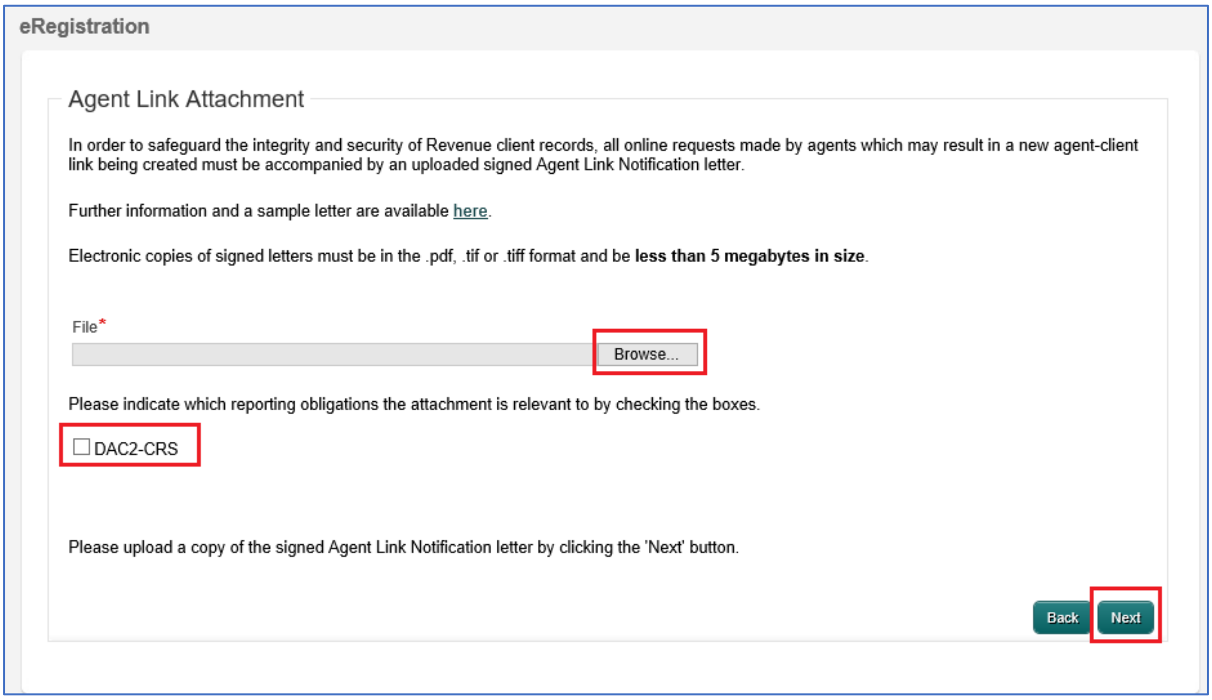
Enter the registration date and click on “**Next”.**



On the eRegistration Summary page you will be requested to generate the Client Consent letter (similar to Agent Link Notification letters). The letter should be completed by the agent and signed by the client. This letter should then scanned or photographed and the electronic version (.pdf, .tif or .tiff are acceptable) should be uploaded on the next page. These files need to be under 5 Mb in size to upload successfully to ROS.
Once you have the Client Consent letter saved in a digital format click on “**Next**”.



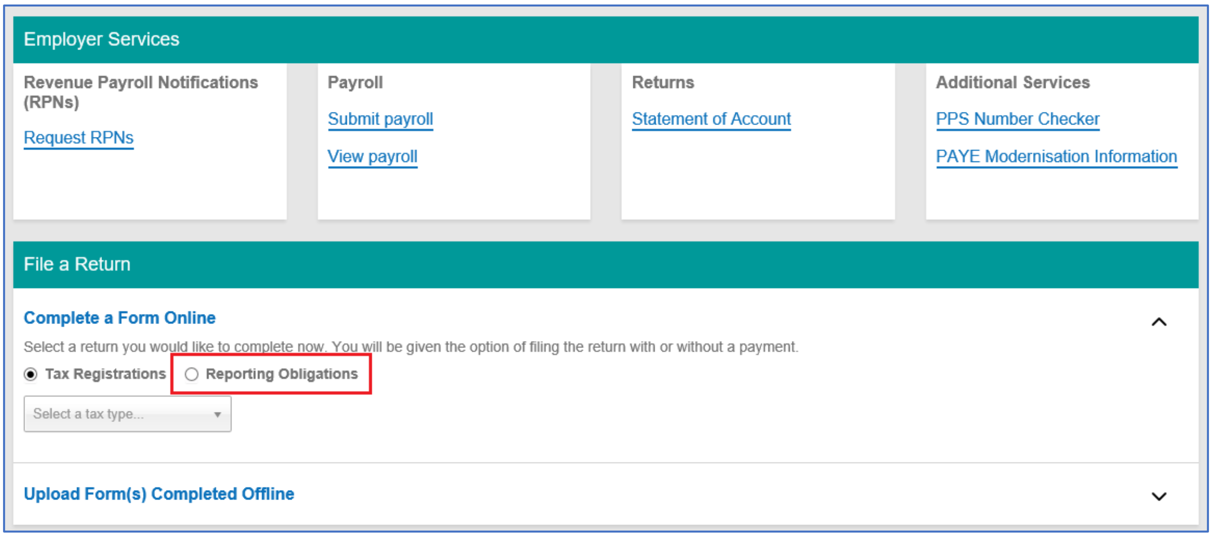
Click on “**Browse**” and upload your Client Consent letter.
Select the relevant reporting obligations and click “**Next**”. (In this example we have selected DAC2-CRS Reporting Obligation).



- Click on “**Sign & Submit**” on the bottom of the next page.
- On the next page enter your password and click on “**Sign & Submit**”.

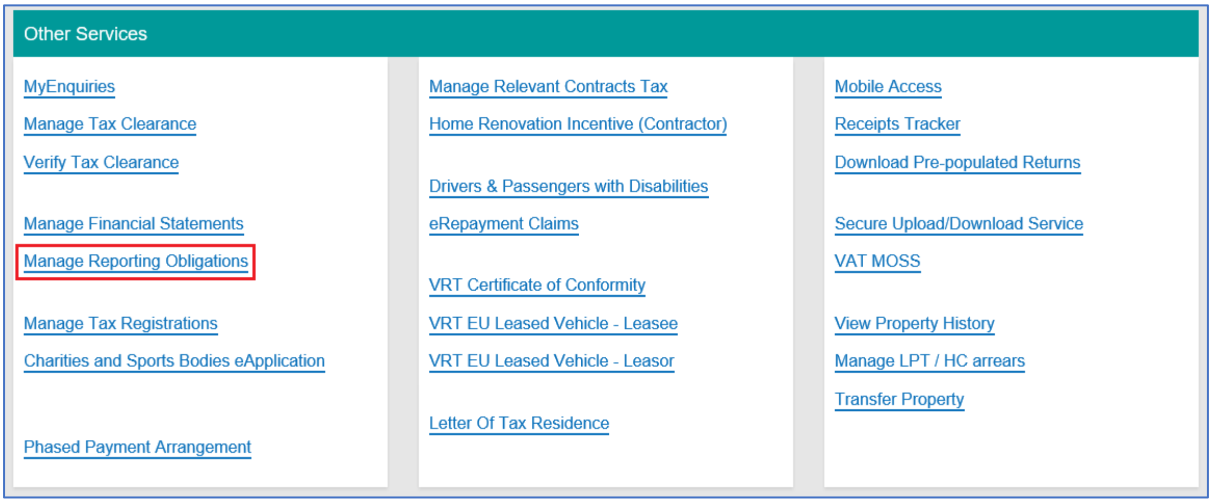
You will receive a ROS Acknowledgement with an eRegistration summary which indicates if the registration/linking was successful.

- Once completed, it may take up to 3 working days for the registration to reflect in ROS.
- You will receive a registration confirmation to your ROS Inbox .
- Once the first reporting obligation is added, the Reporting Obligation radio button will appear under “**Complete a Form Online**” on the “**Client Services**” page.



To register an existing client for a Reporting Obligation (where you are already linked to the client):

You can use the method outlined above, or you can also use the “**Manage Reporting Obligations**” link at the bottom of the “Client Services” screen.



You will be brought to the e-Registration page.

Follow the screens as per the above section “**To register a new client for a Reporting”.**