ROS - Return Preparation Facility (RPF)

Part 38-06-01B

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1   Introduction

The Revenue Online Service (ROS) can be used for both 'online' and 'offline' filing.

When a filer is using an 'online' form, most of the forms have a 'Work In Progress' facility so that a form can be partially completed and the filer can save it and come back to it later to continue the filing. Many returns are prepopulated and are available online.

Some filers use the ROS 'Offline' application and find it convenient to prepare returns, save the completed returns as files on their local computer and then upload those files later. Files are uploaded by logging into ROS and selecting the "Upload a form completed offline" option. Not all ROS forms are available in the ROS Offline application.

A new Return Preparation Facility (RPF) has been developed to replace the ROS Offline application. The RPF enables ROS agents/advisors and customers to complete forms without being logged into ROS, and to save those forms as files on their local computer and upload the saved files to ROS later on.

The ROS Offline application will continue to be available until the RPF is established. Forms will be migrated to the RPF on a phased basis, and not all offline forms will be made available in the RPF. A small number of forms are available in ROS Offline only.

Note: filers must use ROS Online to Sign and Submit all returns to be transmitted to Revenue in order to meet filing obligations, irrespective of how the returns are prepared.

2   What is the Return Preparation Facility?

The RPF is an application that can be used to prepare forms without logging into ROS online. Forms prepared and saved using the RPF must be uploaded using ROS Online to Sign and Submit the return (and thereby meet the filing obligation).

The RPF is accessed through a weblink or URL. Unlike the ROS Offline application, there is no install or upgrades required, and the weblink will always provide the up-to-date version of each form.

The RPF is only accessible using supported browsers which are currently Google Chrome, Microsoft Edge and Opera.

The RPF will allow filers to:

- open a blank form
- access a previously saved form or
- access a pre-populated return downloaded from ROS online.

Filers can save an in-progress form as a file on their computer for later completion. When complete, the saved form can be uploaded to ROS online and proceed to Sign and Submit.

2.1   Time out

Filers should note that the RPF will time out after 30 minutes of inactivity, unlike the ROS Offline application. Users can reset the timer by validating the form or moving to a new tab. If the RPF times out, any unsaved changes to the form will be lost. We recommend saving any form/work in progress regularly and using easily identifiable file names.

As with the existing ROS Offline and Online applications, returns such as the Form 11 may only be amended using ROS online. It is not possible to upload a second Form 11 for a period for which a return has been filed already.

3   Pilot Phase

A pilot trial phase of the RPF was run from May 2022, and the link to access the facility was available only on request from roshelp@revenue.ie. During the trial phase, the Income Tax Form 11 for the 2020 period was the only form available in the RPF.

We gathered feedback on the new facility and used this to inform the development of the RPF.

4   Availability of RPF

The RPF is publicly available from 26 November 2022, from a link on the ROS Login screen. When forms are made available in the RPF, the corresponding form in the ROS Offline application will not be updated and will cease to be usable from that time onwards.

The following forms will be available in the RPF from 26/11/22:

- eStamping
- Form 11 2020 and Form 11 2022
- Form 1 Trust and Estates 2022
- Form 1 Firms 2022.

Work is ongoing to develop additional forms in RPF, in line with the regular annual or periodic update of such forms.

Figure 1 ROS home page and login screen, showing the RPF link

5   How to use the Return Preparation Facility

ROS agents/advisors and customers can access the RPF through a link on the ROS Login screen. If you will use the RPF frequently, you can save the link as a Favourite in your browser. The RPF can be accessed using the following browsers only:

- Microsoft Edge
- Google Chrome
- Opera.

If an unsupported browser is used, the draft returns cannot be saved.

The instructions in the following use the example of an Income Tax Form 11 for 2020. The instructions may vary slightly for forms such as eStamping, as those returns do not require a period to be selected.

5.1   Opening a Form

Select both the Return Type "Form 11"and the Period (if appropriate) from the drop-down menus before proceeding to prepare a return. As noted, eStamping form do not require that a period is selected.

To start with a blank return, click the "Prepare Return" button.

To work on a previously saved or a downloaded form, select the "Click here to open a previously saved form" option before clicking the "Prepare Return" button. Please note that a return type and period (if appropriate) must be selected for this option to become active. A further window will open so that you can browse to the file you want to select to continue work on. The selected file must match the expected form type, as set out in Appendix 1.

Figure 2   Return Preparation Facility Landing Page, with Form 11 2020 selected

A bin icon is available if needed, for the selected file to be unselected.

Figure 3   Return Preparation Facility Landing Page, with previously saved Form 11 2020 selected

You will be presented with an error message if the incorrect file type for the previously saved form is selected.

Figure 4 RPF Existing Form – Error

5.2   Prepopulated Forms

Prepopulated forms are available in most circumstances for the Income Tax Form 11 and the Corporation Tax Form CT1. Where possible, forms are prepopulated with details from the previous year's return or with data available in respect of the current tax year from Revenue or third-party sources, as an aid to filers to complete the current year's return. It is the filer's/taxpayer's responsibility to ensure that the details filed are correct, regardless of prepopulated data provided. Prepopulated forms are not available in all circumstances.

Prepopulated forms, when available, will be offered when completing a form online. A prepopulated form may also be downloaded from the option under Other Services when logged on to ROS Online. The form will save to the Downloads folder. It is recommended that the file is moved or saved in a suitably named folder for ease of access. For example, a Form 11 could be moved to a folder such as C:\ROS\Form 11. Forms downloaded or saved in this way may be accessed using the RPF.

6   Working on the Form

Once you click on the Prepare Return button, you are presented with the selected form.

Note: there is a 'time out' alert on this facility. If the screen is inactive for 30 minutes or longer, the time out will be triggered and any unsaved work will be lost. Therefore, it is important to save work (the form) regularly to avoid and lost content.

The timer is reset when the "Validate", "Save As" or "Save" buttons are clicked, or by moving between tabs in the form.

6.1   Validate Button

To activate the "Save As" and "Save" buttons, you must first click the "Validate" button. If there are any errors on the form, these will be highlighted. You must rectify the errors and validate again to activate the 'Save' buttons.

After clicking "Validate" the information on that page of the form will be locked until you move to another page in the form.

6.2   Save As Button

After successful validation, the first time you save a newly opened form, you must select "Save As". This will open the file chooser window and you must navigate to the folder where you want to save the form. After this initial save, you can use the "Save" button.

We recommend using folder names such as C:\ROS\Form 11 to help in finding and accessing your saved forms in the future.

You must use the 'Save As' option even if you have opened a previously saved form.

6.3   Save Button

The "Save" button can be used after the first "save as" of a newly opened form. Clicking "Save" will overwrite the previously saved version of the form in the saved location.

6.4   Close Button

The "Close" button allows you to return to the Return Preparation Facility landing page without saving.

7   Completing the Form 11 2020 Return

Figure 5 RPF – Form 11 2020

All relevant panels of the Form 11 need to be completed.

To enable the 'Save As' option in a new Form 11, you must complete both of the Personal Details pages **and** you must visit (click into) the IT Self-Assessment panel. These are the minimum steps needed before the return can be saved.

If you are accessing a downloaded prepopulated form, you must also click into each of the prepopulated panels. These panels are marked with a yellow tick symbol which will change to white after you visit that page.

On the Form 11, there is a link on the Print View page "Click to print this page". This will print the full details of the return if needed.

Figure 6 RPF – Form 11 2020 Print View Summary

The completed returns must be saved to the user's computer. Partially completed returns should be saved for later ROS submission.

Help with completing your 2020 income tax return and self-assessment is available on www.revenue.ie. The Guide to Completing 2020 Pay & File Self-Assessment Returns is a comprehensive guide for all the panels and questions on the Form 11.

8   How to upload and submit the Form 11 Return to ROS

Once you have completed and saved the Form 11 2020 return, you must upload this saved return through ROS. You can do this by logging into ROS, scrolling down to the tab 'Upload Form(s) Completed Offline' (Agent Services/My Services screen) and selecting the Form 11 from the drop-down list and clicking on 'Upload Return'.

A dialogue box will open, click on the "Add File(s)" button on the left of the screen and select the F11 return(s) you want to submit to Revenue. You will need to navigate to the location on your computer where you saved the F11 return(s). Choose named F11 to upload and select 'Open'. Having added your F11 return(s), you must sign the return(s) with your digital certificate and submit to ROS.

You will receive an acknowledgement from ROS that the F11 return(s) has been filed.

Figure 7 RPF – Selecting form for upload in ROS Online
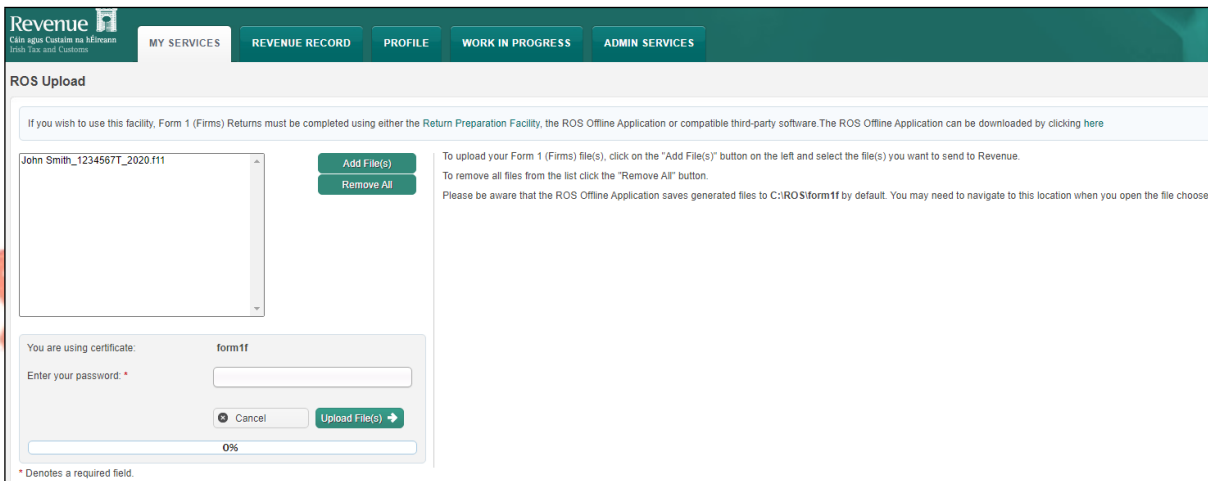
Figure 8 RPF – Return upload screen in ROS Online

Appendix 1

The error message: "The file type does not match the return selected" will be displayed if you try to open a previously saved file that does not have the expected file extension for that form. The following table shows what file extension is expected for each form available in the RPF.

If you have a valid data file with an extension such as .xml or .txt, you must rename the file to access it using the RPF.

Form Type	Expected file type	Example	Date Available in RPF
Income Tax Form 11 2020	.f11	1234567AB 2020.f11	9/5/22
Income Tax Form 11 2022 (2022 returns cannot be filed until 1/1/23 at the earliest)	.f11	1234567AB 2020.f11	26/11/22
Income Tax Form 1 Trust and Estates 2022	.f1	1234567AB 2022.f1	26/11/22
Income Tax Form 1 Firms 2022	.f1f	1234567AB 2022.f1f	26/11/22
eStamping	.sd	1234567AB 221126.sd	26/11/22