

How to eRegister a client for CGT – Solicitor

- Log into [ROS](#) on your TAIN digital certificate. Please note that you will not have access to client Eregistration options if you log on to ROS using an individual or business certificate.

If you have not already registered for ROS as an TAIN, you can do so by selecting “A Tax Agent” and using your Solicitor TAIN on the [ROS Registration](#) page.

- On the Agent Services page, scroll down to the “Manage Tax Registrations” section.
- Under the “Manage Client Registrations” heading, enter a tax type your client is already registered for e.g. PAYE-Ind, Income Tax, etc. Enter their tax registration number and official name. Select “Manage Tax Registrations” from the drop down list and click on “**Manage**”.

The screenshot shows the 'Manage Tax Registrations' interface. On the left, under 'Manage Client Registrations', there is a section for 'Tax Registrations' (selected) and 'Reporting Obligations'. A red box highlights the 'Income Tax' dropdown menu, a text input field containing 'TEST TEST', another dropdown menu for 'Manage Tax Registrations', and a 'Manage' button below it. On the right, there are sections for 'Register New Revenue Customer' and 'Register New Reporting Entity'.

- Under Capital Gains Tax (CGT), click on “**Select Action**” to view the options available to you.

The screenshot shows the 'eRegistration' interface. On the left, there is a sidebar with 'Manage Your Tax Registrations and Agent Links' and 'Notes'. The main area is titled 'Registration Options' and contains three sections: 'Income Tax - IT' (Status: Active, Number: You are linked to this tax) with 'Cease Registration' and 'Remove Agent Link' buttons; 'Capital Gains Tax - CGT' (You are not linked to this tax) with a 'Select Action' button highlighted in red, and three options: 'Add and link to a new registration', 'Link and cease an existing registration', and 'Link only to an existing registration'; and 'Value Added Tax - VAT' (You are not linked to this tax) with a 'Select Action' button.

The three options are:

“Add and link to a new registration” - used to register a client for CGT and to link to them for that tax type.

“Link and cease an existing registration” - used to de-register a client for CGT.

“Link only to an existing registration” - used where the client is already registered for CGT but you are not linked as the agent.

- In this example, to register a client for CGT and to link yourself as agent, click on “Add and link to a new registration” option.
- You will receive notification that you will need to upload an “Agent Link Notification” (please see a bit further down for more information on this).
- Click on “Confirm”.

eRegistration

Request Confirmation

⚠ You will be required to upload an 'Agent Link Notification' letter authorising this request before completion.

Electronic copies of signed letters must be in the .pdf, .tif or .tiff format and be less than 5 megabytes in size.

Please confirm that the customer does not have an active or ceased registration for this tax before proceeding. This information will only be available to you online if you are already linked to the customer for this tax.

Confirming a customer's eligibility for this request will help to ensure that your request is processed as expected. Requests deemed invalid will not be processed.

[Back](#) [Confirm](#)

- Enter the date you want the CGT registration to be active from and click on “Add to Your Requests”.

eRegistration

CGT Registration

* Denotes a required field

Registration Date (DD/MM/YYYY) * 25/05/2020

[Cancel](#) [Add To Your Requests](#)

- You will now see the new CGT registration added to “Your Requests” on the right.
- Click on “Submit”.

eRegistration

Manage Your Tax Registrations and Agent Links
 Note: You may add multiple requests to 'Your Requests' area. You will be brought back to this screen after completing each request form. Items in the 'Your Requests' area will not be processed until the 'Submit' process is completed.

Registration Options

- Income Tax - IT**
 Status: Active
 Number: [blank]
 You are linked to this tax
 [Order Registration] [Remove Agent Link]
- Capital Gains Tax - CGT**
 Status: In Requests
 [Select Action]
- Value Added Tax - VAT**
 You are not linked to this tax
 [Select Action]
- Employer (PAYE/PRSI)**
 You are not linked to this tax
 [Select Action]
- Relevant Contracts Tax - RCT**
 You are not linked to this tax
 [Select Action]
- Environmental Levy - ELEV**
 You are not linked to this tax
 [Select Action]

Your Requests (1)

Register: CGT
 Edit Cancel

You need to submit this request in order for this transaction to be processed.
 [Submit]

On the eRegistration Summary page you may generate the Client Consent letter. The letter should be completed by the TAIN/Solicitor 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”**.

eRegistration

Summary

Capital Gains Tax Registration (New)
 Registration Date: 25/05/2020

i The option to generate a Consent letter that can be signed by your client and a copy retained on your records is displayed below. Click on the "Generate Client Consent Letter" button to generate a Consent Letter in respect of the registrations input for your client. The letter will be generated in .PDF format. To view this Letter, you will need at least Adobe Reader version 8.0 or a similar .PDF Reader. The latest version of Adobe Reader is available for free from the following link: [Download Adobe Reader](#).

[Generate Client Consent Letter] [Back] [Next]

- Click on **“Browse”** or **“Choose File”** and upload your file.
- Tick the **“Capital Gains Tax”** box.
- Click **“Next”**.

eRegistration

Agent Link Attachment

In order to safeguard the integrity and security of Revenue client records, all online requests made by agents which may result in a new agent-client link being created must be accompanied by an uploaded signed Agent Link Notification letter.

Further information and a sample letter are available [here](#).

Electronic copies of signed letters must be in the .pdf, .tif or .tiff format and be less than 5 megabytes in size.

File *

Please indicate which tax heads the attachment is relevant to by checking the boxes.

Capital Gains Tax

Please upload a copy of the signed Agent Link Notification letter by clicking the 'Next' button.

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

Information

 If your **transaction** is ready to be transmitted, please sign and submit by entering your password below. If you wish to review the details of this transaction click on the button marked Back.

Once your transaction has been successfully transmitted you will be provided with a notice number for the transaction. Please keep a note of this number for your records.

Sign & Submit

Certificate [Help](#)

Enter Password 

0%

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

ROS Acknowledgement

You have just transmitted an Online Registration Return for your client which has been received by ROS.

You can access a copy of this transaction through your client's ROS Inbox by clicking on the Client Revenue Record tab above. A Receipt will be sent to your ROS Inbox as soon as this transaction has been processed by Revenue.
To file another Return click on Client Services tab.
To return to Agent Services click on Agent Services tab.

Please use the **Notice Number** below in any future correspondence or inquiry relating to this transaction.

Notice Number **4593821038U**

eRegistration summary:

Action	Status	Comments
Register and Link CGT	Success	

To return to Agent Services click on Agent Services tab.

OK

You will also receive a registration confirmation to your ROS Inbox (on the Revenue Record tab in ROS).

The screenshot shows the Revenue ROS interface. The top navigation bar includes 'AGENT SERVICES', 'REVENUE RECORD' (highlighted with a red box), 'PROFILE', and 'ADMIN SERVICES'. The 'REVENUE RECORD' tab is active, displaying 'All Clients - Inbox Messages'. A search bar is visible. Below the search bar, there are filters for 'Tax Type/Duty/Rep. Oblig.' and 'Document Type'. A table of registration records is shown, with the following data:

Notice No.	Customer Name	Regn./Trader No./Doc. ID	Mandatory BOE Req.	Tax Type/Duty/Rep. Oblig.	Document Type	Period Begin	Issued Date
4593821038U	TEST, TEST		Yes		Tax Registration	NA	25/05/2019

Once completed, it may take up to 3 working days for the registration to reflect in ROS.