

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**”.

Manage Tax Registrations

Manage Client Registrations

Please use this option to update, add or cancel Agent/Client links and tax registrations if your client had/had an existing tax number, incl. PAYE.

Tax Registrations Reporting Obligations

VAT
ros

[Manage →](#)

Register New Revenue Customer

You can now register new individuals, companies, partnerships and trusts with Revenue.

[Register New Revenue Customer](#)

You can also register new reporting entities.

[Register New Reporting Entity](#)

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).

eRegistration

Manage Your Reporting Obligations and TAIN Links

Notes:
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

Share Schemes Reporting - SSR You are not linked to this reporting obligation	Select Action
DAC6 - DAC6 You are not linked to this reporting obligation	Select Action
DAC7 - DAC7 You are not linked to this reporting obligation	Select Action
Suspicious Transaction Reports - STR You are not linked to this reporting obligation	Select Action
CESOP - CESOP You are not linked to this reporting obligation	Select Action
FATCA - FATCA You are not linked to this reporting obligation	Select Action
DAC2-CRS - DAC2-CRS You are not linked to this reporting obligation	Select Action
DAC4-CbC - DAC4-CbC You are not linked to this reporting obligation	Select Action

You will be presented with 3 options.

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

Manage Your Reporting Obligations and TAIN Links
Notes:
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

- Share Schemes Reporting - SSR**
You are not linked to this reporting obligation [Select Action >](#)
- DAC6 - DAC6**
You are not linked to this reporting obligation
[Add and link to a new registration](#)
[Link and cease an existing registration](#)
[Link only to an existing registration](#) [Select Action >](#)
- DAC7 - DAC7**
You are not linked to this reporting obligation [Select Action >](#)
- Suspicious Transaction Reports - STR**
You are not linked to this reporting obligation [Select Action >](#)
- CESOP - CESOP**
You are not linked to this reporting obligation [Select Action >](#)
- FATCA - FATCA**
You are not linked to this reporting obligation [Select Action >](#)
- DAC2-CRS - DAC2-CRS**
You are not linked to this reporting obligation [Select Action >](#)
- DAC4-CbC - DAC4-CbC**
You are not linked to this reporting obligation [Select Action >](#)

- 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.

eRegistration

Manage Your Reporting Obligations and TAIN Links
Notes:
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

- Share Schemes Reporting - SSR**
You are not linked to this reporting obligation [Select Action >](#)
- DAC6 - DAC6**
Status: In Requests [Select Action >](#)
- DAC7 - DAC7**
You are not linked to this reporting obligation [Select Action >](#)
- Suspicious Transaction Reports - STR**
You are not linked to this reporting obligation [Select Action >](#)
- CESOP - CESOP**
You are not linked to this reporting obligation [Select Action >](#)
- FATCA - FATCA**
You are not linked to this reporting obligation [Select Action >](#)
- DAC2-CRS - DAC2-CRS**
You are not linked to this reporting obligation [Select Action >](#)
- DAC4-CbC - DAC4-CbC**
You are not linked to this reporting obligation [Select Action >](#)

Your Requests (1)

Register
DAC6
Edit Cancel

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

You are no longer required to generate a Client Consent letter if the client has an online registration in ROS or myAccount. Upon submission of the Agent Link Request by the agent/advisor, the ROS client will receive a notification in their ROS Inbox and the myAccount client will receive a notification in their MyEnquiries. The pending link will remain at "Pending" status until: It is Approved or Rejected by the client from the ROS Inbox notification/MyEnquiry sent to their ROS or myAccount, or by the client accessing the link request in the Agent Link Manager. You will receive a ROS notification when the client Approves or Rejects the request. If the pending link request is Approved, the information will be used to create the link in Revenue's systems. If the pending link request is neither Approved nor Rejected, it will expire after 30 days. Please note that it can take up to three working days for Agent link requests to update fully to ROS.

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

The screenshot shows the 'eRegistration' summary page. It contains a 'Summary' section with the following details:

- DAC6 Reporting Obligation (New)
- Registration Date: 08/04/2020

At the bottom right of the summary box, there are two buttons: a 'Back' button and a 'Sign and Submit' button. The 'Sign and Submit' button is highlighted with a red rectangular box.

Once the first reporting obligation is added, the Reporting Obligation radio button will appear under "**Complete a Form Online**" on the "**Client Services**" page.

The screenshot shows the 'Employer Services' page. The 'File a Return' section is expanded, showing the following options:

- Complete a Form Online** (with an upward arrow icon)
- Select a return you would like to complete now. You will be given the option of filing the return with or without a payment.
- Tax Registrations
- Reporting Obligations (highlighted with a red box)
- Select a tax type... (dropdown menu)
- Upload Form(s) Completed Offline** (with a downward arrow icon)

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.

Manage Tax Registrations

Manage Client Registrations
Please use this option to update, add or cancel Agent/Client links and tax registrations if your client had/has an existing tax number, incl. PAYE.

Tax Registrations Reporting Obligations

Select a tax type... Enter registration no.
Enter name Select tax type...

Manage →

Register New Revenue Customer
You can now register new individuals, companies, partnerships and trusts with Revenue.

Register New Revenue Customer

You can also register new reporting entities.

Register New Reporting Entity

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

eRegistration

Reporting Entity Registration (1 of 2)

⚠ 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 tif, tiff or pdf format and be less than 5 megabytes in size.

Please note,

- If the customer should be registered for additional reporting obligation, please select the additional reporting obligation. You will be identified as the linked agent for these additional registrations selected.

DAC2-CRS Reporting Obligation
 DAC4-CbC Reporting Obligation
 FATCA Reporting Obligation
 DAC6 Reporting Obligation
 DAC7 Reporting Obligation
 CESOP Reporting Obligation

Next →

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

eRegistration

Reporting Entity Registration (2 of 2) - Reporting Entity Details

* Denotes a required field
Please supply at least one of email address, phone number or mobile number.

Reporting Entity

Reporting Entity name *

Address Line 1 *

Address Line 2 *

Address Line 3

Address Line 4

Eircode

Email Address

Phone (STD Code and Number)

Mobile Contact Name

Mobile Number

Responsible Officer *

Cancel Back Next

Enter the registration date and click on “Next”.

eRegistration

DAC2-CRS Registration

* Denotes a required field

Registration Date (DD/MM/YYYY) *

Cancel Back Next

You are no longer required to generate a Client Consent letter if the client has an online registration in ROS or myAccount. Upon submission of the Agent Link Request by the agent/advisor, the ROS client will receive a notification in their ROS Inbox and the myAccount client will receive a notification in their MyEnquiries. The pending link will remain at “Pending” status until: It is Approved or Rejected by the client from the ROS Inbox notification/MyEnquiry sent to their ROS or myAccount, or by the client accessing the link request in the Agent Link Manager. You will receive a ROS notification when the client Approves or Rejects the request. If the pending link request is Approved, the information will be used to create the link in Revenue’s systems. If the pending link request is neither Approved nor Rejected, it will expire after 30 days. Please note that it can take up to three working days for Agent link requests to update fully to ROS

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

Once the first reporting obligation is added, the Reporting Obligation radio button will appear under **“Complete a Form Online”** on the **“Client Services”** page.

The screenshot shows a web interface with two main sections. The top section, titled 'Employer Services', is divided into four columns: 'Revenue Payroll Notifications (RPNs)' with a link 'Request RPNs'; 'Payroll' with links 'Submit payroll' and 'View payroll'; 'Returns' with a link 'Statement of Account'; and 'Additional Services' with links 'PPS Number Checker' and 'PAYE Modernisation Information'. The bottom section, titled 'File a Return', contains a heading 'Complete a Form Online' with a sub-heading 'Select a return you would like to complete now. You will be given the option of filing the return with or without a payment.' Below this are two radio buttons: 'Tax Registrations' (selected) and 'Reporting Obligations' (highlighted with a red box). A dropdown menu 'Select a tax type...' is positioned below the radio buttons. At the bottom of the 'File a Return' section is a link 'Upload Form(s) Completed Offline'.

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.

The screenshot shows a web interface with a section titled 'Other Services' containing a grid of links. The links are organized into three columns. The first column includes: 'MyEnquiries', 'Manage Tax Clearance', 'Verify Tax Clearance', 'Manage Financial Statements', 'Manage Reporting Obligations' (highlighted with a red box), 'Manage Tax Registrations', 'Charities and Sports Bodies eApplication', and 'Phased Payment Arrangement'. The second column includes: 'Manage Relevant Contracts Tax', 'Home Renovation Incentive (Contractor)', 'Drivers & Passengers with Disabilities', 'eRepayment Claims', 'VRT Certificate of Conformity', 'VRT EU Leased Vehicle - Lessee', 'VRT EU Leased Vehicle - Leasor', and 'Letter Of Tax Residence'. The third column includes: 'Mobile Access', 'Receipts Tracker', 'Download Pre-populated Returns', 'Secure Upload/Download Service', 'VAT MOSS', 'View Property History', 'Manage LPT / HC arrears', and 'Transfer Property'.

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”**.