

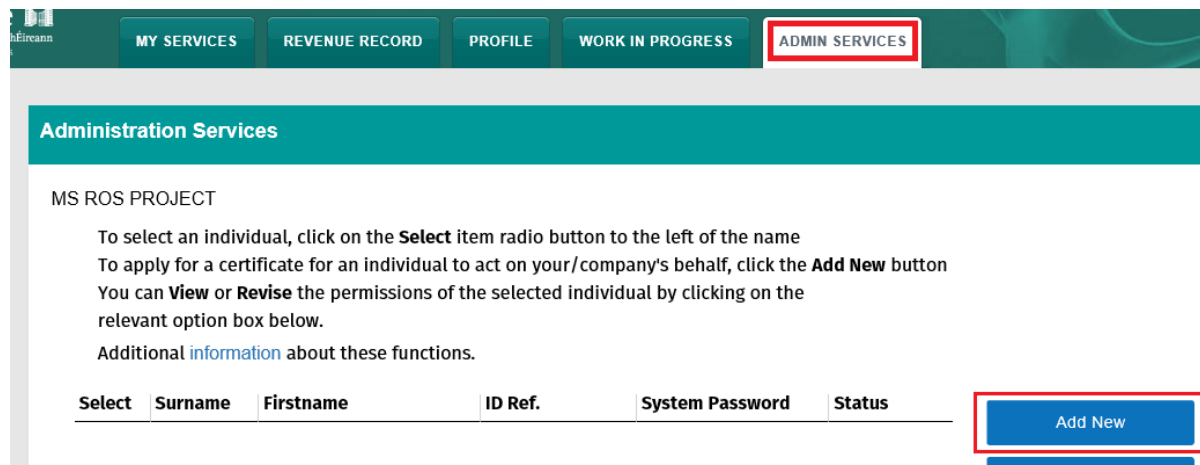
## Instructions for Solicitors - setting up SA2 filing access for sub-users on ROS

ROS Administrators can set up sub-certs, to allow users to file SA2 returns on ROS. If the permissions are restricted, as outlined in this document, the sub-user will not have access to file other returns or to view Inbox items or Information services in Revenue Record.

### To set up an SA2 sub-cert:

Log into ROS as the ROS Administrator and click on the "**Admin Services**" tab.

Click "**Add new**".



The screenshot shows the ROS Admin Services interface. The top navigation bar includes tabs for MY SERVICES, REVENUE RECORD, PROFILE, WORK IN PROGRESS, and ADMIN SERVICES. The ADMIN SERVICES tab is selected and highlighted with a red box. Below the navigation bar, the page title is "Administration Services". The main content area is titled "MS ROS PROJECT" and contains instructions: "To select an individual, click on the **Select** item radio button to the left of the name. To apply for a certificate for an individual to act on your/company's behalf, click the **Add New** button. You can **View** or **Revise** the permissions of the selected individual by clicking on the relevant option box below. Additional [information](#) about these functions." Below the instructions is a table with columns: Select, Surname, Firstname, ID Ref., System Password, and Status. The "Add New" button is highlighted with a red box.

Enter the sub-user details:

- **Surname:** Surname of the individual that the cert is for.
- **First Name:** First name of the individual the cert is for.
- **ID Ref:** This is an identifier that you make up - e.g. staff number, or other identifier.  
The ID Ref will be used to download the certificate and must be unique.
- **ID Type:** The type of ID reference number given from the dropdown menu - e.g. Other.
- **E-Mail Address:** Contact e-mail address for the above named.
- **Third Party Certificate:** not relevant for this type of sub-cert – leave this blank.
- **Money Laundering Reporting Officer (MLRO)** – leave this set to "No".
- **SEED Number:** not relevant for this type of sub-cert – leave this blank.
- **EORI Number:** not relevant for this type of sub-cert – leave this blank.

Click "**Submit**".

Surname	<input checked="" type="checkbox"/>	Filing		
First Name	<input checked="" type="checkbox"/>	SA2		
ID Ref	<input checked="" type="checkbox"/>	SA2Filing	ID Type <input checked="" type="checkbox"/>	Other <input type="checkbox"/> <span>i</span>
E-mail address for the above named	<input checked="" type="checkbox"/>	Test@Test.com		
Third Party Certificate				<span>i</span>
Money Laundering Reporting Officer (MLRO)		<input type="radio"/> Yes	<input checked="" type="radio"/> No	<span>i</span>
SEED Number for the above named				<span>i</span>
EORI Identifier for the above named				<span>i</span>

Click on the **Submit** button to send your details to ROS

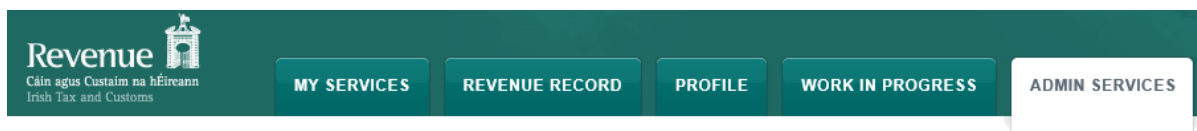
**Submit**

Click on the **Back** button to go back to the previous page

**Back**

You should receive confirmation that a new Certificate has been requested.

Click on **“OK”** to return to the Admin Services tab.



**You have just applied for a new Sub-User Certificate**

Your application for a new Certificate for **SA2 FILING** has been received by ROS.

The above named has been sent an email informing them to contact you for their ID Reference and System Password.

The ID Reference and System Password is available to you on your Administration Services Page.

Click the padlock to reveal the System Password.

You currently have **6** associated certificate(s).

There is no limit to the number of associated certificates you can apply for.

To return to Administration Services page now click the OK button

**OK**

Once back in Admin Services, select the new sub-cert on the left and click on **“Revise”** to go to the permissions.

To select an individual, click on the **Select** item radio button to the left of the name  
 To apply for a certificate for an individual to act on your/company's behalf, click the **Add New** button  
 You can **View** or **Revise** the permissions of the selected individual by clicking on the relevant option box below.  
 Additional [information](#) about these functions.

Select	Surname	Firstname	ID Ref.	System Password	Status
<input checked="" type="radio"/>	FILING	SA2	SA2FILING		REGISTERED

[Add New](#)

[View](#)

[Revise](#)

Scroll down the permissions page until you can see “All Taxes/Procedures” and click on “**Remove All**”.

Under “Permissions on Administration Services”, ensure that “**All No**” is selected. Click on “**Confirm**” to save the changes.

SSR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**All Taxes/Procedures** [Remove All](#) [View All](#) [Prepare All](#) [File All](#)

### Permissions on Administration Services

• **No:** Permission not available, **Yes:** Permission available

Service	No	Yes
Add New	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Revise	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Amend Email Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Revoke	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Set Signature Requirements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Inbox Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submit Registration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Amend Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Direct Debit Instruction	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Electronic Funds Transfer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Secure Upload	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Manage Tax Clearance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Verify Tax Clearance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access DPD System	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access Phased Payment Arrangement	<input checked="" type="checkbox"/>	<input type="checkbox"/>


**All Administration Services** [All No](#) [All Yes](#) [Confirm](#)

Click the “**System Password**” padlock icon for the new sub-user and note the system password; you should also note the “**ID Ref**” you created as they will be needed to download the certificate.

## Administration Services

To select an individual, click on the **Select** item radio button to the left of the name  
To apply for a certificate for an individual to act on your/company's behalf, click the **Add New** button  
You can **View** or **Revise** the permissions of the selected individual by clicking on the relevant option box below.

Additional [information](#) about these functions.

Select	Surname	Firstname	ID Ref.	System Password	Status
<input type="radio"/>	FILING	SA2	SA2FILING		REGISTERED

Add New

View

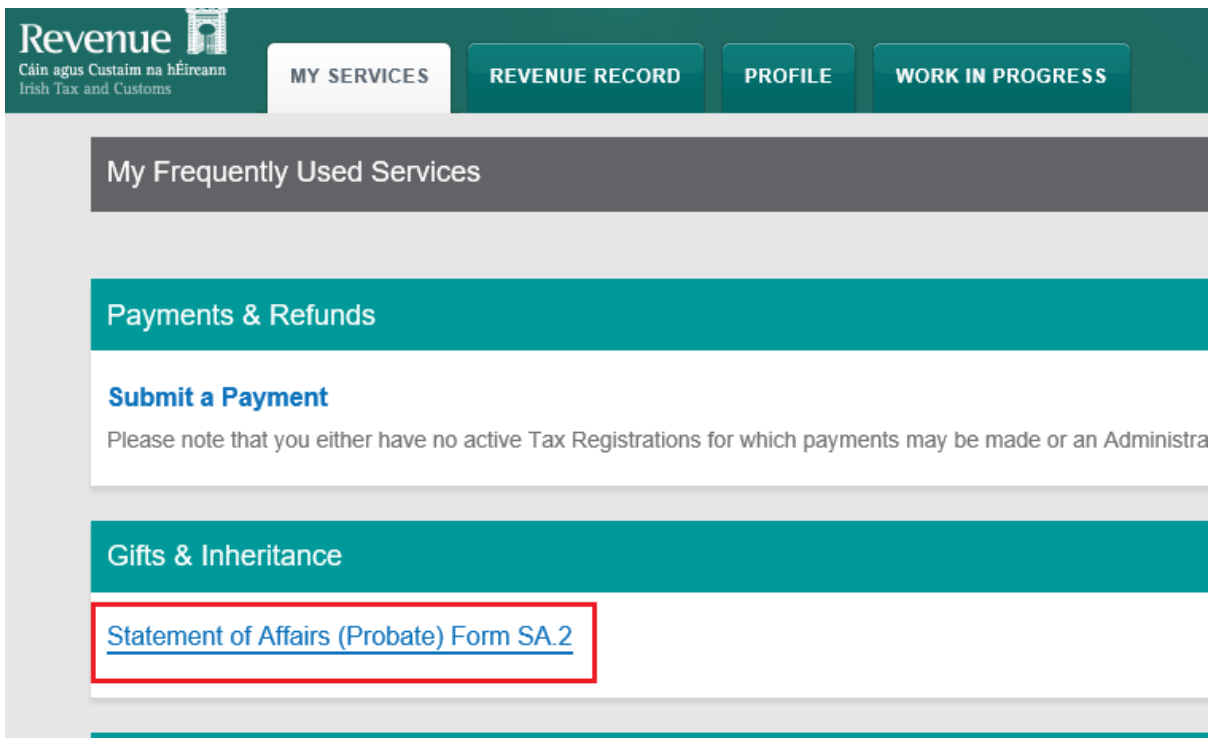
Revise

You must notify the sub-user of the “**ID Ref**” and “**System Password**” for the certificate so that they can complete Step 3 of Register for ROS. It should be immediately available for download.

**Instructions for downloading sub-certs are available in the “Instruction for Sub-user” Pdf on the “Sub-user or linked certificate” section, in “Getting Started” topic on ROS Help.**

Once the sub-cert is downloaded, the Status column on the Administrator’s Admin Services tab will change from “Registered” to “Active”.

Once the sub-user logs in on their new sub-cert, they will see the SA2 form on the My Services page.



Revenue  
Cáin agus Custaim na hÉireann  
Irish Tax and Customs

MY SERVICES REVENUE RECORD PROFILE WORK IN PROGRESS

### My Frequently Used Services

#### Payments & Refunds

[Submit a Payment](#)

Please note that you either have no active Tax Registrations for which payments may be made or an Administra

#### Gifts & Inheritance

[Statement of Affairs \(Probate\) Form SA.2](#)