

CRBOT

ROS & myAccount Screen Extracts

Full troubleshooting guide available in CRBOT section on [Revenue.ie](https://www.revenue.ie)

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1. ROS Agent/Advisor Screens

1.1. Access by Agents/ Advisors/ Presenters to the Register TAIN SERVICES

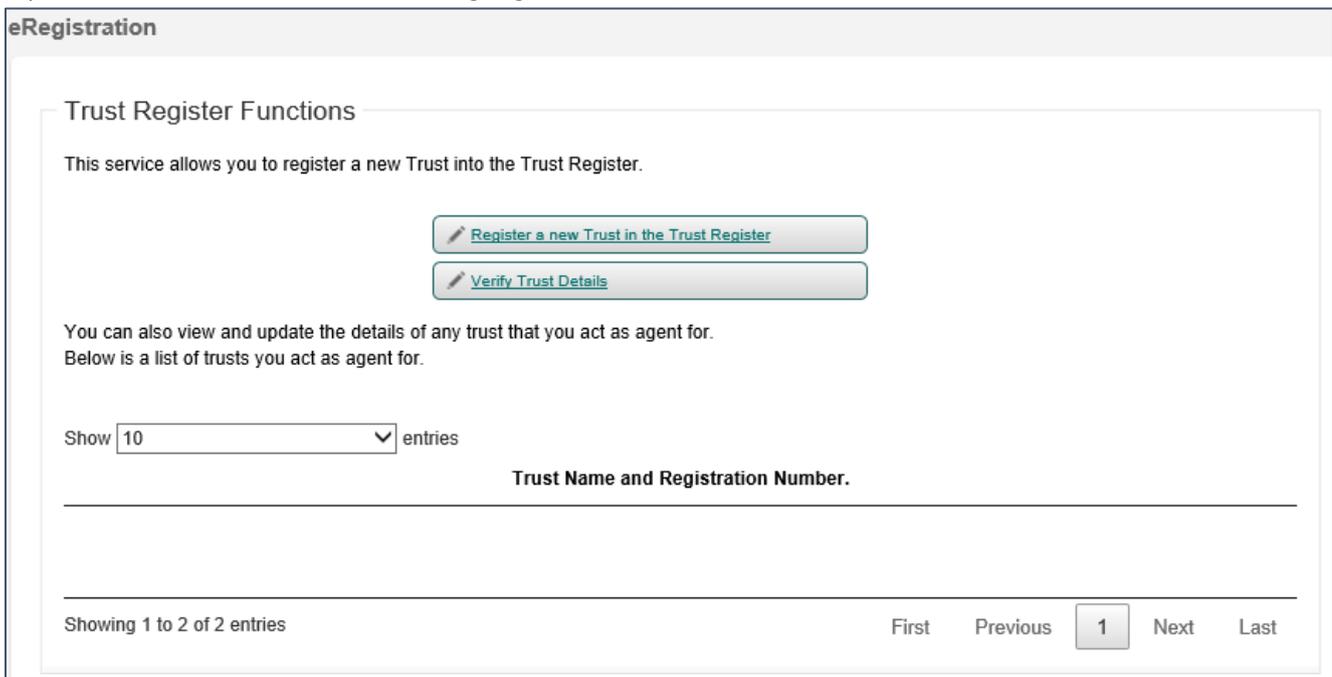


A screenshot of a web application menu titled "Other Services". The menu items are: "MyEnquiries", "VAT Number Verification", "Manage Financial Statements", "Upload Multiple Financial Statements", and "Trust Register Functions". The "Trust Register Functions" item is highlighted with a red rectangular border.

1.2. Trust Registrations

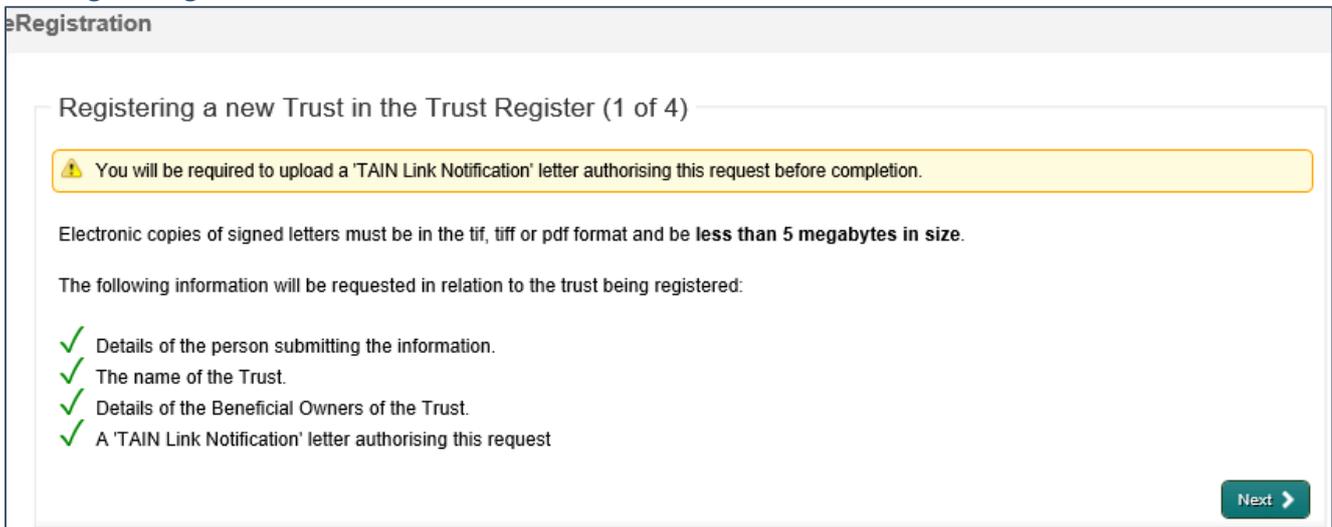
Successfully filed trusts will appear under **Trust Name and Registration Number.**

If you need to edit details on an existing registered trust, click on the trust name.



A screenshot of the "eRegistration" page. The "Trust Register Functions" section contains the text: "This service allows you to register a new Trust into the Trust Register." Below this are two buttons: "Register a new Trust in the Trust Register" and "Verify Trust Details". Further down, it says: "You can also view and update the details of any trust that you act as agent for. Below is a list of trusts you act as agent for." There is a dropdown menu set to "10" entries. Below that is a table header "Trust Name and Registration Number." with a horizontal line underneath. At the bottom, it says "Showing 1 to 2 of 2 entries" and has navigation buttons: "First", "Previous", "1", "Next", "Last".

1.3. Registering a new trust



A screenshot of the "eRegistration" page showing the "Registering a new Trust in the Trust Register (1 of 4)" step. A yellow warning box states: "You will be required to upload a 'TAIN Link Notification' letter authorising this request before completion." Below this, it says: "Electronic copies of signed letters must be in the tif, tiff or pdf format and be less than 5 megabytes in size." The following information will be requested in relation to the trust being registered:

- ✓ Details of the person submitting the information.
- ✓ The name of the Trust.
- ✓ Details of the Beneficial Owners of the Trust.
- ✓ A 'TAIN Link Notification' letter authorising this request

A "Next" button with a right arrow is located at the bottom right.

1.4. Presenter Details

Note: If a presenter has already registered a trust, their details can be prepopulated in the form by clicking on their name. If a new presenter is filing the information, they will have to enter their full details in all mandatory fields (*).

Note: Please ensure that the email address provided here has been set-up on MyEnquiries (see Admin Service tab).

Trust Registration (2 of 4) - Presenter Details

Capacity of the person providing the information * Please Select...
Agent/Presenter
Officer/Employee of the Trustee
Trustee

Show entries

Presenter Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
JOE BLOGGS	THE VILLAGE	SMALL TOWN		

Showing 1 to 1 of 1 entries First Previous **1** Next Last

First Name *

Surname *

Address

Address Line 1 *

Address Line 2 *

Address Line 3

Address Line 4

Eircode

Email Address *

Phone *

1.5. Name of Trust

The trust must be given a name.

Trust Registration (3 of 4) - Basic Trust Details

Name of Trust * This value is required.

1.6. Beneficial Ownership Details

Step 1: Pick from dropdown for BO type. There will be different information required based on the BO type and the legal entity/individual status of the BO type.

Step 2: Once the BO information has been entered click **Add/Update**. Successful additions will be added to the Beneficial Ownership List (see red box below)

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

Beneficial Owner

Type of Beneficial Owner * Please Select...
Settlor
Trustee
Protector
Beneficiary
Other natural person exercising effective control
Class of Beneficiary

Is this Beneficial Owner a Legal Entity? *

Address

Address Line 1 *
Address Line 2 *
Address Line 3
Address Line 4
Eircode

Statement of the nature and extent of the interest held or control exercised

Date on which this beneficial owner was entered into the entity's internal register *
Date on which this beneficial owner ceased being a beneficial owner
Nature and extent of interest held *

Add/Update > Create New >

Beneficial Ownership List

Identifier	Type of Beneficial Owner	Name	Action	Action
------------	--------------------------	------	--------	--------

X Cancel < Back Next >

1.7. Legal Entity as Beneficiary

If the beneficial owner is a legal entity (company) **and** it's beneficial ownership type is that of Beneficiary **and** the legal entity is registered on another Central Register, then the presenter can provide details of this other Central Register.

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

Beneficial Owner

Type of Beneficial Owner * Beneficiary

Is this Beneficial Owner a Legal Entity? * Yes No

Legal Entity Name *

Are the beneficial owners already registered on another Central Register of Beneficial Ownership in Ireland or the EU? * Yes No

Filing Reference Number in the Central Register *
Name of the Central Register *

Legal Entity Address

Address Line 1 *
Address Line 2 *
Address Line 3
Address Line 4
Eircode

1.8. Legal Entity as other type of beneficial owner or not on another Central Register

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

 As the Beneficial Owner is a Legal Entity please enter the individual Beneficial Owners of the Legal Entity as per the Guidance Notes available on www.revenue.ie.

Beneficial Owner

Type of Beneficial Owner *

Is this Beneficial Owner a Legal Entity? * Yes No

Legal Entity Name *

Legal Entity Address

Address Line 1 *

Address Line 2 *

Address Line 3

Address Line 4

Eircode

Statement of the nature and extent of the interest held or control exercised

Date on which this beneficial owner was entered into the entity's internal register *

Date on which this beneficial owner ceased being a beneficial owner

Nature and extent of interest held or control exercised *

Add/Update > Create New >

1.9. Individual as a Beneficial Owner

1.9.1. Beneficial Owner has a PPS Number

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

Beneficial Owner

Type of Beneficial Owner * Beneficiary

Is this Beneficial Owner a Legal Entity? * Yes No

First Name *

Surname *

Date of Birth *

Does this party have a PPSN? * Yes No

PPS Number *

Nationality * Please Select...

Country of Residence * Please Select...

Address

Address Line 1 *

Address Line 2 *

Address Line 3

Address Line 4

Eircode

Statement of the nature and extent of the interest held or control exercised

1.9.2. Beneficial Owner does not have a PPS Number

ID documentation can be uploaded in PDF format.

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

Beneficial Owner

Type of Beneficial Owner * Beneficiary

Is this Beneficial Owner a Legal Entity? * Yes No

First Name *

Surname *

Date of Birth *

Does this party have a PPSN? * Yes No

Select the type of identification being provided * Please Select...

Identification No. *

Nationality * Please Select...

Country of Residence * Please Select...

Please upload documentary proof that the above details

File *

Browse...

Address

Address Line 1 *

1.10. TAIN Link Notification

Note: This is the only way for the TAIN Link Notification to be submitted for the Trust Register.

TAIN 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 TAIN 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*

Browse...

Please indicate which reporting obligations the attachment is relevant to by checking the boxes.

Trust Register Reporting

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

[← Back](#) [Next →](#)

TAIN Link Attachment

Attached approval letter file(s):

Trust Register Reporting TAIN Link - CRBOT Final.pdf [Remove Attachment](#)

[Back](#) [Sign and Submit](#)

1.11. Sign & Submit

Return

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: 879850_agent [Help](#)

Enter Password: [password field]

[Sign & Submit](#) [Back](#)

0%

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 TAIN Services click on TAIN Services tab.

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

Notice Number: **5502042972I**

eRegistration summary:

Action	Status	Comments
Register and Link TREG	Success	

To return to TAIN Services click on TAIN Services tab. [OK](#)

The Trust is registered and will be available to review in Trust Register Functions.

Note: The register can take up to 48 hours to view in Trust Register Functions.

1.12. Partially Saved registration

This screen will be visible on entering Trust Register Functions, if the trust has not been fully registered.

Note: If the you select the “New”, this will automatically delete this partially saved trust.

Retrieve Saved Data Option

The following data is already stored in ROS. You can either Edit, Sign or Delete the stored item/s or proceed with a New, different item

Period End	Status	Last Action Performed By	Select
0	Started	ROS ADMINISTRATOR	⊙

Click on the **New** button to proceed with a new item

Click on the **Edit** button to edit the details of the selected item

Click on the **Sign** button to proceed directly to the sign and submit stage for the selected item

Click on the **Delete** button to permanently delete the selected item

Click on the **Back** button to return to the Services page

New
Edit
Sign
Delete
Back

1.13. Editing or amending Trust Register details

Step 1: Click on trust to be edited.

Trust Register Functions

This service allows you to register a new Trust into the Trust Register.

[Register a new Trust in the Trust Register](#)

You can also view and update the details of any trust that you act as agent for.
Below is a list of trusts you act as agent for.

Show 10 entries

Trust Name and Registration Number.

T 03708637BH

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Step 2: Click Next to enter Beneficial Ownership Details page.

Trust Registration (3 of 4) - Basic Trust Details

Name of Trust * T

If a 3rd party requires access to the Trust Register (to verify the Beneficial Owners of the Trust), a Trust Register Access Number must be created for the Trust.
Both the Registration Number and the Trust Register Access Number should be given to the 3rd party.

Registration Number 03708637BH

Trust Register Access Number

Trust Register Access Number Expiry Date

Generate new Access Number

Cancel

Back Next

Note: If you are providing an Access Number to a designated person you can select Generate new Access number. Please see CRBOT Information on Access for Designated Persons & Discrepancy Notices for further information.

Please note this option is not available on myAccount currently and you may have to register for ROS.

Step 3: Enter Presenter Details

If you have already presented a trust using this cert, your details will be available to pre-populate (in red box below):

Trust Registration (2 of 4) - Presenter Details

Capacity of the person providing the information * Agent/Presenter

Show 5 entries

Presenter Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
Test Example	Town	County		

Showing 1 to 1 of 1 entries

Clear

First Previous 1 Next Last

First Name *

Surname *

Legal Entity Address

Address Line 1 *

Address Line 2 *

Address Line 3

Address Line 4

Eircode

Email Address *

Phone *

Cancel Back Next

Step 4: Edit details of Existing Beneficial Owners

The Beneficial Ownership Details page will open on the first Beneficial Owner (BO) as per the Beneficial Ownership List at the bottom of the page (in the red box).

Click the word **“Amend”** beside that BO. This will allow the presenter to make necessary changes. Click **Add/Update**.

To add a new Beneficial Owner click **Create New**.

Notes:

- When changes/additions for BOs are complete, click **Add/Update** button.
- If you cancel or click out of the trust at this stage all information entered in this sitting will be lost and must be re-entered.
- When satisfied with changes, click Next and then Sign & Submit.
- The register can take up to 18 hours to view in Trust Register Functions page
- There is no need to re-upload TAIN Link.
- If you wish to cease the beneficial owner with the trust you must click Amend on the relevant beneficial owner and then enter the ‘Date on which the beneficial owner ceased being a beneficial owner’. Click **Add/Update**.

Trust Registration (4 of 4) - Beneficial Ownership Details

* Denotes a required field

Beneficial Owner

Type of Beneficial Owner * Beneficiary

Is this Beneficial Owner a Legal Entity? * Yes No

Legal Entity Name * Happy Company

Address

Legal Entity Address

Address Line 1 * Street

Address Line 2 * Town

Address Line 3 * County

Address Line 4

Eircode

Statement of the nature and extent of the interest held or control exercised

Date on which this beneficial owner was entered into the entity's internal register * 10/09/2021

Date on which this beneficial owner ceased being a beneficial owner

Nature and extent of interest held * 100% beneficiary of assets held by the trust.

Add/Update Create New

Identifier	Type of Beneficial Owner	Name	Action	Action
	Beneficiary	Happy Company		Amend
	Trustee	Jan Bloggs		Amend
	Protector	Feb Bloggs		Amend
	Settlor	Mar Bloggs		Amend
	Settlor	Jolly Company		Amend

Cancel Back Next

1.14. Changing Agent/Advisor Link

In order to link to an existing Trust (AML Register) customer, the agent must select

- The 'Reporting Obligations' radio-button.
- Select 'TREG' in the 'Select a reporting obligation' dropdown.
- Input the registration number in the 'Enter registration no.' field.
- Enter the Trusts Name in the 'Enter name' field.
- Select 'Manage Reporting Obligations' in the final dropdown on the bottom right-hand side.
- Click the Manage button & follow through to completion of the link.

This Trust will now be available in the correct ROS cert and they can amend as required.

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 reporting obligation...
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

You can now register a company for the VATOSS Import Scheme

Register for Import Scheme

2. myAccount screens

myAccount main page scroll down to Manage My Record below:

Notes:

- Only Trustees can register a trust via myAccount (or as ROS user with a business registration).
- Anyone acting in a representative capacity only (agent/advisor) must register trusts via ROS, either with their existing agent cert or by getting a [Trust Register TAIN & then registering for ROS](#).
- Please note there are certain restrictions when using myAccount, i.e. all beneficial owners must possess PPSN's (unless they are a legal entity) and you will not be able to generate an Access Number for designated persons via myAccount. You may need to [register for ROS](#) if either of these two issues will affect a trust you are registering. Before registering for ROS you will need to apply for a [Trust Register TAIN](#).

Manage My Record

Manage My Record: a range of services to manage and update your record and make enquiries.
[Learn more](#)

- [My Profile](#)
- [My Enquiries](#)
- [Receipts Tracker](#)
- [My Documents](#)
- [Letter of Tax Residence](#)
- [Upload Supporting Documents](#)
- [Capital Gains Clearance](#)
- [Tax Registrations](#)
- [Trust Register Functions](#)
- [Tax Clearance](#)
- [Update Bank Details for PAYE Refunds](#)
- [Update Civil Status](#)
- [VAT Number Verification](#)
- [Manage Professional Services](#)
- [Withholding Tax](#)

Note: Successfully registered Trusts will be available in section in red box below.

Trust Register Functions

This service allows you to register a new Trust into the Trust Register.
[Register a new Trust in the Trust Register](#)

You can also view and update the details of any trust that you have filed previously. Below is a list of trusts you previously filed.

Show entries

Trust Name and Registration Number

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

2.1. Presenter Details.

[← Cancel](#)

Presenter

Basic Presenter Details

Presenter Capacity

Capacity of the person providing the information

Please Select...
Officer/Employee of the Trustee
Trustee
Agent/Presenter

Show 5 entries

Presenter Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
J. BLOGGS	The Village	Nice Town		

Showing 1 to 1 of 1 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Presenter Details

First Name

Surname

Address Details

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Eircode (if known)

Email Address

Phone Number

[Next →](#)

2.2. Trust Name

A trust name must be provided.

[← Back](#)

Register a new Trust Register

Basic Trust Details

Beneficial Owners

Business Contact

Details

Name of Trust

[Next →](#)

2.3. Beneficial Ownership Details

After each entry click **Add/Update**. When BO entries complete, click Confirm button to finish registration.

Note: Same regulations apply around Legal Entities, i.e. if the Legal Entity is a beneficiary and registered on another Central Register this information can be provided where prompted.

[← Back](#)

Beneficial Owners

Beneficial Owner Details

Type of Beneficial Owner

Please Select...

Settlor

Trustee

Protector

Beneficiary

Other natural person exercising effective control

Class of Beneficiary

Address Details

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Eircode (if known)

Registration Details

Date on which this beneficial owner was entered into the entity's internal register as a beneficial owner

DD MM YYYY

Date on which this beneficial owner ceased being a beneficial owner of this entity

DD MM YYYY

Nature and extent of interest held

[Add/Update](#) [Create New](#)

Beneficial Ownership List

Identifier	Type of Beneficial Owner	Name	Action	Action

[Confirm →](#)

2.4. Sign & Submit with myAccount password.

[← Cancel](#)

Submit Changes

Please enter your myAccount password in order to submit your changes

Password

[Submit](#) [Cancel](#)

[← Back to Tax Services](#)

Thank you for your submission

You have been successfully registered to the Trust Register.

It may take up 48 hours for the register to be updated on the system.

Note: To amend BO details of a registered Trust, click on the trust name in Trust Register Functions (point 28.)

Enter the trust and move through the pages to Beneficial Ownership Details.

Click Amend beside the name you wish to amend.

If you want to add a new BO, click Create new.

When you have finished amending/adding the relevant BO, click **Add/Update**.