

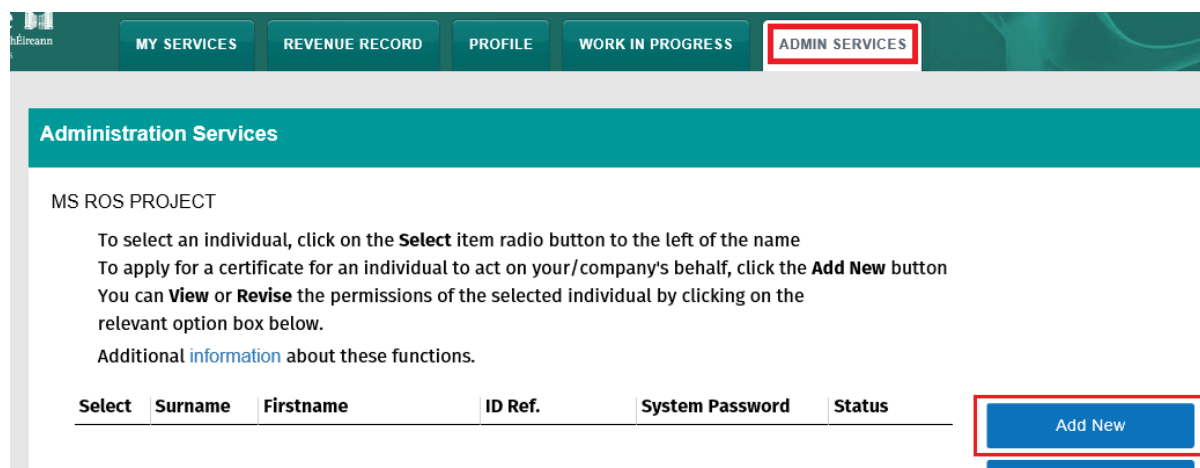
Instructions for Solicitors - setting up SA2 filing access for sub-users on ROS

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. At the top, there is a navigation bar with tabs: MY SERVICES, REVENUE RECORD, PROFILE, WORK IN PROGRESS, and ADMIN SERVICES. The ADMIN SERVICES tab is highlighted with a red box. Below the navigation bar, there is a section titled "Administration Services" with the heading "MS ROS PROJECT". The text in this section reads: "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 text is a table with columns: Select, Surname, Firstname, ID Ref., System Password, and Status. To the right of the table is a blue button labeled "Add New", which 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.
- **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.

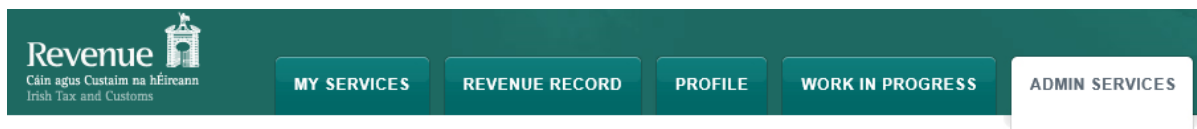
Click "**Submit**".

Surname	<input checked="" type="checkbox"/>	<input type="text" value="Filing"/>		
First Name	<input checked="" type="checkbox"/>	<input type="text" value="SA2"/>		
ID Ref	<input checked="" type="checkbox"/>	<input type="text" value="SA2Filing"/>	ID Type <input checked="" type="checkbox"/>	<input type="text" value="Other"/> <input type="button" value="i"/>
E-mail address for the above named	<input checked="" type="checkbox"/>	<input type="text" value="test@test.com"/>		
Third Party Certificate		<input type="text" value="v"/>		<input type="button" value="i"/>
SEED Number for the above named		<input type="text"/>		<input type="button" value="i"/>
EORI Identifier for the above named		<input type="text"/>		<input type="button" value="i"/>

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

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

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	<input type="text" value=""/>	REGISTERED

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

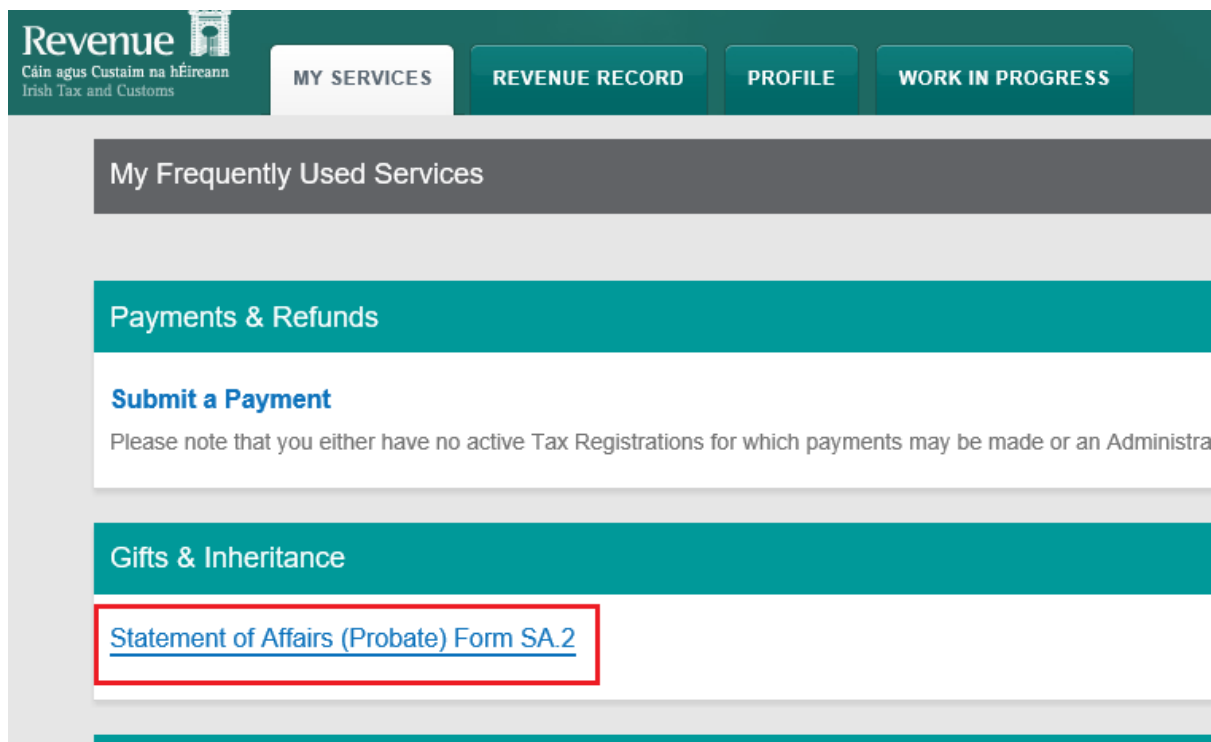
Add New
View
Revise

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.



The screenshot shows the Revenue website's "MY SERVICES" page. The header includes the Revenue logo and navigation buttons for "MY SERVICES", "REVENUE RECORD", "PROFILE", and "WORK IN PROGRESS". The main content area is titled "My Frequently Used Services" and is divided into sections: "Payments & Refunds" with a "Submit a Payment" link and a note about active tax registrations; and "Gifts & Inheritance" with a link to the "Statement of Affairs (Probate) Form SA.2" highlighted by a red box.