Receipts Tracker in myAccount and ROS

Part 38-06-06

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1   Background

The Receipts Tracker can help you easily keep track and save receipts, images and expense details. Receipts Tracker is available in myAccount or ROS on www.revenue.ie and can be accessed on your computer, laptop or on the go from your mobile device. You can record receipts details and images relating to the following:

- Health, Medical, Dental and Nursing home Expenses

- Remote Working Relief (for 2020 onwards)

- Rental Property Expenses

- Stay and Spend (for expenditure between 1 October 2020 to 30 April 2021)

- Trade or Business Expenses

- Other expenses and documents, for example, Tuition fees.

The Receipts Tracker automatically saves and securely stores receipts details and/or images to Revenue storage. The benefits of uploading your receipt images include not having to retain the original receipt images and details of your expenses, the stored details are available to assist completion of your income tax return. If you chose not to save your receipt images to Revenue storage, you must retain the original receipt for a period of 6 years.

In order to claim the tax credits or reliefs due, on your uploaded receipts, you must complete an Income Tax Return. You can also claim some tax credits during the year in real time, such as Health, Dental (non-routine) and Nursing home expenses, or you can choose to claim them by completing an Income Tax Return. For more information on how to claim Real Time Credits see Tax and Duty Manual (TDM) Part 38-06-04 - PAYE Services: Manage Your Tax.

2   Benefits of using Receipts Tracker to save receipts details and images

When you save receipts details and/or images to Revenue storage, you:

a) Do not have to retain original receipts for Revenue purposes. However, you must first be satisfied that uploaded images relate to the expense details to be recorded and they are clear, readable and complete.

b) Can see your receipt details under the Health, Stay and Spend, Remote Working and Tuition fees categories automatically appearing on your online annual Income Tax Return, making it quicker and easier to complete[1].

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[1] Receipts recorded under Trade, Rental and Other categories are available in the Receipts Tracker on myAccount or ROS to assist the completion of your income tax return.

c) Can claim tax credits in real time in the current year for Health, Dental (non-routine) and Nursing home expenses.

d) Will reduce potential contact from a Revenue caseworker in the event of verification checks being undertaken on your claims or Income Tax Returns.

3 Deactivation of Revenue Receipt Tracker App (RRTA)

The RRTA was deactivated with effect from 30 September 2021. Receipt details and images uploaded to Revenue storage prior to the deactivation of the RRTA, will be available in Receipts Tracker on myAccount and ROS.

4 Requirements to sign-in to Receipts Tracker

To sign-in to the Receipts Tracker you will need to be registered for myAccount or ROS. PAYE only customers should use myAccount while self-employed/chargeable customers must access the portal via ROS.

Information on how you can register for myAccount can be found here. Information on how you can register for ROS can be found here.

5 How to access Receipts Tracker in myAccount

The Receipts Tracker is available in myAccount on www.revenue.ie. If you wish to use myAccount in the Irish language, you can select 'Gaeilge' on the top right-hand side of the www.revenue.ie homepage.
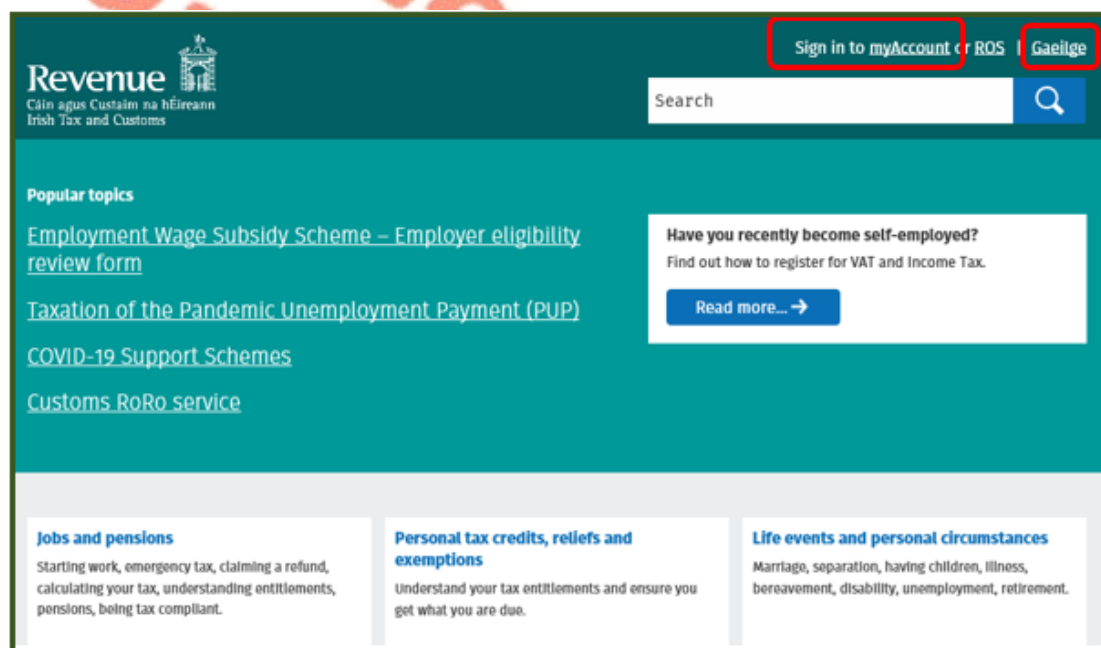

Figure 1: Revenue homepage

On the 'Sign In' page you must enter your PPSN, Date of Birth and Password. You should then complete the reCaptcha and click 'Sign In'. You can also sign in using MyGovID.

Figure 2: myAccount 'Sign In' screen

If you are not registered for myAccount you can do so by clicking 'Register Now' and follow the steps to register for myAccount.

Once you have signed in you can also choose to enable the two-step verification process to securely log in. If you choose this option a six-digit verification code will be sent to your mobile device every time you log in. You will need to enter this verification code in order to access the PAYE services available. More information about using myAccount is available here.

Figure 3: 'Secure Login Verification Code' Screen

Once you have logged on to myAccount, you can access 'Receipts Tracker' from the 'PAYE Services' or 'Manage My Record' card.
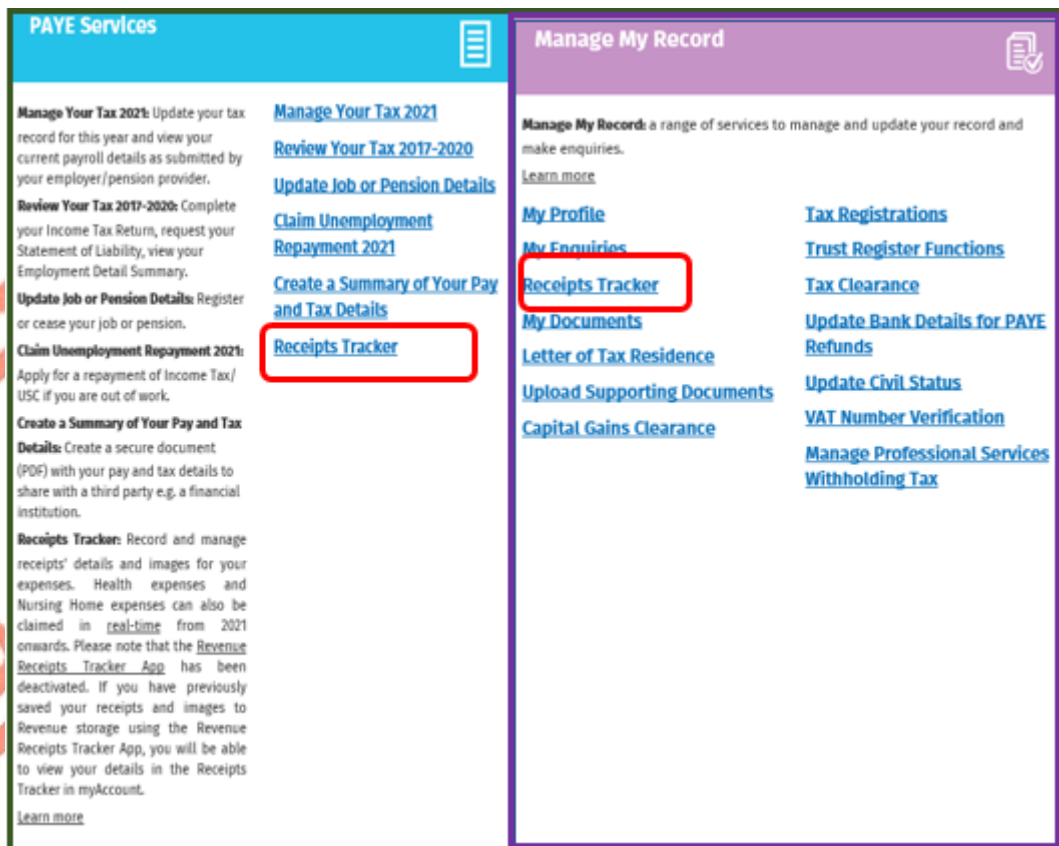

Figure 4: Receipts Tracker in 'PAYE Services' and 'Manage My Record' screens

5.1   Using Receipts Tracker

You can upload receipts details and expenses by clicking 'Receipts Tracker' see 5.2 for more detail. You can also view receipts you have previously uploaded to the Receipts Tracker. Receipts details and expenses uploaded using the RRTA and saved to Revenue storage, will also be displayed here.

The total amount of receipts uploaded for the year will be displayed for the current year and the previous four years. You can view all receipts for a particular year by selecting 'View 20XX receipts' or you can view receipts by category by selecting 'Category Breakdown'.
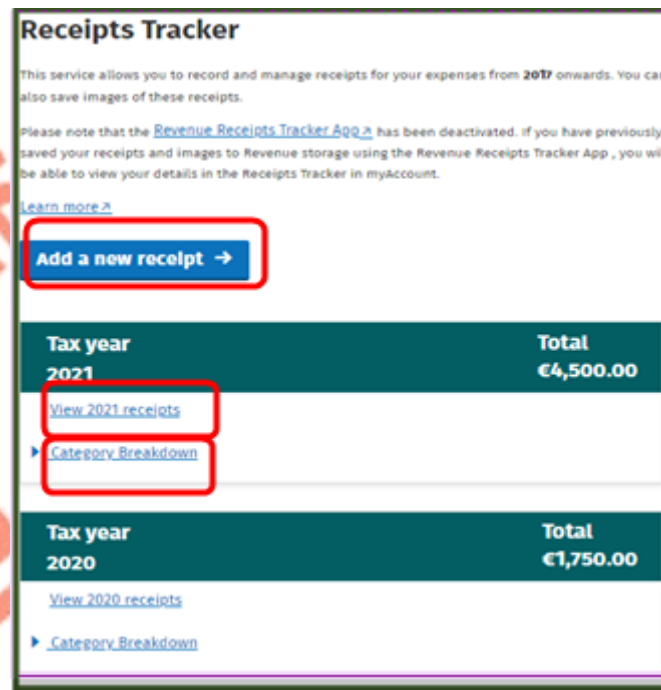

Figure 5: 'Receipts Tracker' home screen

To view a breakdown by category and month of receipts uploaded by you, select 'Category Breakdown' for the relevant year. You can view a breakdown for each expense category and year by selecting from the dropdown boxes.

The summary breakdown will show the expense subcategory, date expense was incurred and amount paid by you. For receipts paid from 2021 onwards, the real time credit status of the receipt will also be shown. You can also view the receipt in more detail and make amendments or delete the receipt by selecting 'View/Amend/Delete'.

Figure 6: 'Category Breakdown' screen

To view uploaded receipts for a particular year, you can select 'View 20XX Receipts'. This screen provides a breakdown of all categories that a receipt has been uploaded for.   The summary will show the expense subcategory, date expense was incurred and amount paid by you. You can also view the receipt in more detail and make amendments or delete the receipt by selecting 'View/Amend/Delete'.

For receipts paid from 2021 onwards the real time credit status of the receipt will also be shown. You can choose to view unclaimed receipts, claimed receipts or all receipts by selecting from the dropdown box on the left-hand side of the screen.

You can also claim certain tax credits in real time for Health, Dental (non-routine) and Nursing home expense categories by selecting 'Show unclaimed receipts' and selecting 'Claim credit'.

Figure 7: 'View 20XX Receipts' screen

5.2   How to add a new receipt using Receipts Tracker

You can record receipt details under the following categories and sub-categories/ types of expenses:

Category	Sub-Categories/Types of expenses			
Health	General	Dental (non-routine)	Nursing home	Dental and health expenses refunded	Nursing home fees refunded
Remote Working	Heat/Electricity	Broadband			
Rental	Repairs	Interest	Other expense	Capital Expenditure	
Stay and Spend	Accommodation	Accommodation and food	Food		
Trade	Expenses	Capital expenditure			
Other	Professional Services Withholding Tax (PSWT)	Pension	Tuition fees	Other receipts	Documentation

Table 1: List of expense categories and sub-categories

The links in Table 1 provide detailed information about qualifying expenditure and expenses that are available on revenue.ie.   The sub-categories 'Dental and Health expenses refunded' and 'Nursing home fees refunded' are available for 2020 and prior years. For expenses paid in 2021, the details of the refund are mandatory and have been included in the Health, Dental (non-routine) and Nursing home categories.

To enter receipt details and images, you should click 'Add a new receipt' on the 'Receipts Tracker' home screen.
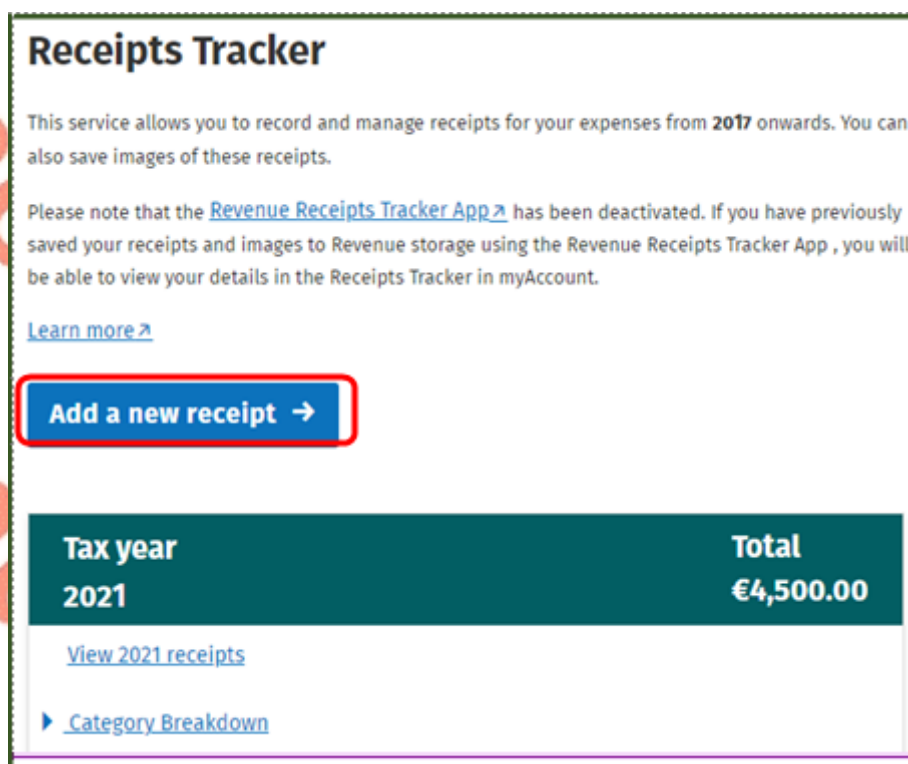
Figure 8: 'Receipts Tracker' screen

You must provide the following details for each receipt entered:
- Date expense paid;
- Category;
- Type;
- Amount of expense paid by you.

Additional details must be entered for some categories of receipts. For example, the name of the student must be entered for Tuition fee(s) receipts or the name of the nursing home for Nursing home expenses.

You can record images of receipts in support of the expense. It should be noted that it is **mandatory** to upload a receipt image for the Health, Nursing home and Remote Working expense categories, for expenses paid in 2021. You must also upload receipt images for the Stay and Spend category for the qualifying period.

You should enter the date the expense was paid by you as this will determine the expense categories and sub-categories available. You should then choose the expense category and, if applicable, the category sub-type. You should then enter the amount of the expense paid.

Figure 9: General' Health detail entry screen

Once you have entered the relevant details for the expense category, you can upload receipts' images and expenses in support of the expense that you want to record. To upload an image, you can select 'Click to browse for a file' to browse your computer files for the image.

Figure 10: 'Upload receipt documents' screen

If you are using your mobile device you can browse your files or select an image from your photo library. You can also take a picture of your receipt and confirm you wish to use it by following the on-screen instructions.
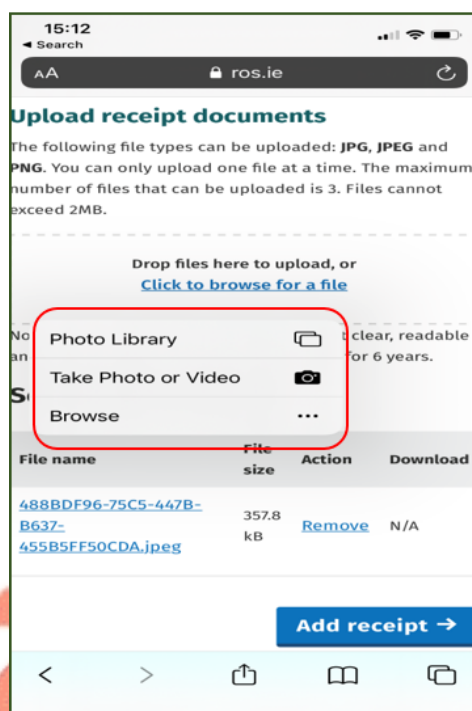

Figure 11: Image option screen for mobile device

The image you upload must be clear, readable and must relate to the expense details to be recorded. It is **mandatory** to upload a receipt image for the Stay and Spend category. It is also mandatory to upload receipts images for expenses paid from 2021 onwards for the following categories/sub-categories:

- Remote Working,
- Health
- Dental (non-routine) and
- Nursing home

If you have not uploaded a receipt image for Stay and Spend, Health, Nursing home expenses and/or, Remote Working expenss paid in 2021, you will not be able to add the receipt until an image has been uploaded.

If you do not save an image of a receipt on the Receipts Tracker, you must retain a copy of the original receipt for six years.

Once you have completed all the required fields and are satisfied that details are correct and accurate, click 'Add receipt'.

You will then receive a notification screen confirming your receipt has been successfully uploaded. If you have additional expenses or receipts to upload, you can click 'Add another receipt'. You can also return to the Receipts Tracker home page by clicking 'Back to summary'.
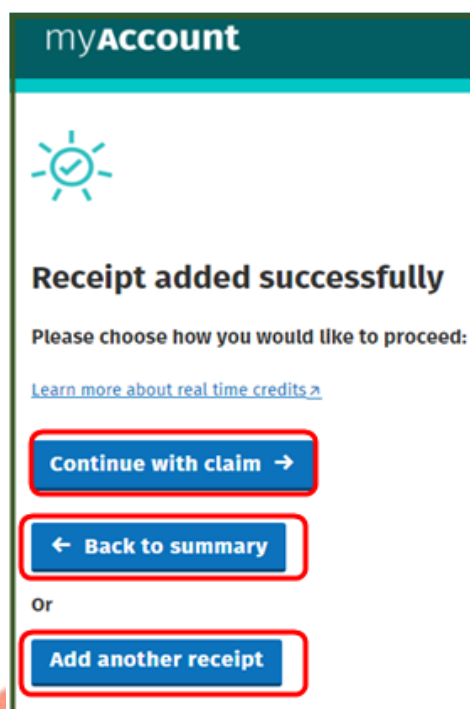
Figure 12: 'Receipt added successfully' screen

For Health and Nursing home expenses paid in the current year, you can choose to claim the tax credit in real time by selecting 'Continue with claim'. You will need to follow the onscreen prompts to confirm the tax credits you are claiming are correct and that you have declared any additional income. You must then sign and submit your claim for the tax credit.

Once your claim has been validated and processed your tax credit will be updated to reflect any change in your credits. You will receive the benefit when your employer next processes your payroll.

If you submit a claim close to the end of the year or after your employer has run the last payroll for the current year, you may not receive the tax credit in your pay in that year.   You will be able to review your tax position for the year in early January by submitting an Income Tax Return. You can access this service by selecting the 'Review your tax' link on the 'PAYE Services' card in myAccount.

For more information on how to claim real Time Credits see TDM Part 38-06-04 - PAYE Services: Manage Your Tax.

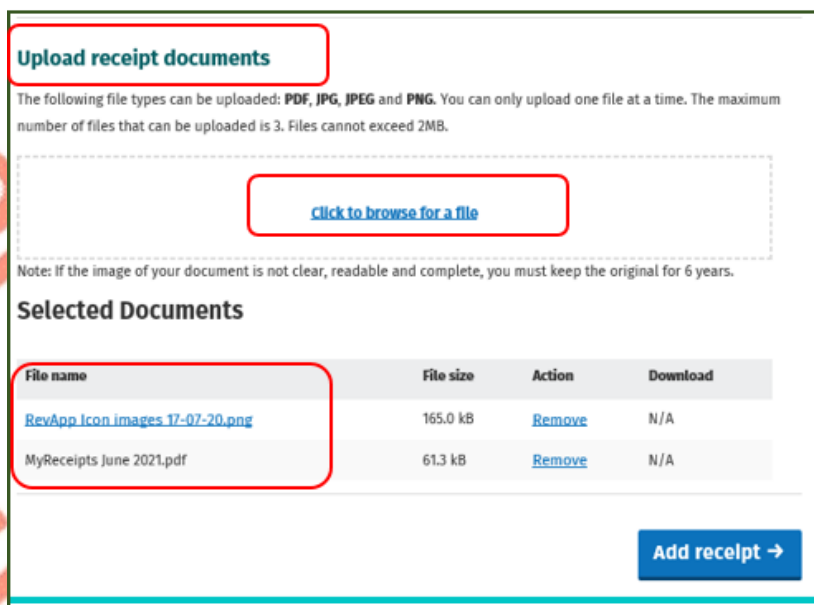## 5.3   Uploading images, file formats and image/PDF file size

You can upload different file formats using the Receipts Tracker. The type of files that you generate will depend on your particular operating system, computer or mobile device.

The following image file formats can be uploaded:
- .jpg
- .jpeg
- .png

You can also upload a PDF for the expense you are claiming.

To upload an image, you can select 'Click to browse for a file' to browse your computer files for the image or PDF.

Figure 13: 'Upload receipt documents' screen

If you are using your mobile device, you can select an image from your photo library, take a picture of your receipt or browse files on your mobile device. The image that you upload must be clear, readable and must relate to the expense details to be recorded. You must confirm that you wish to use the image.
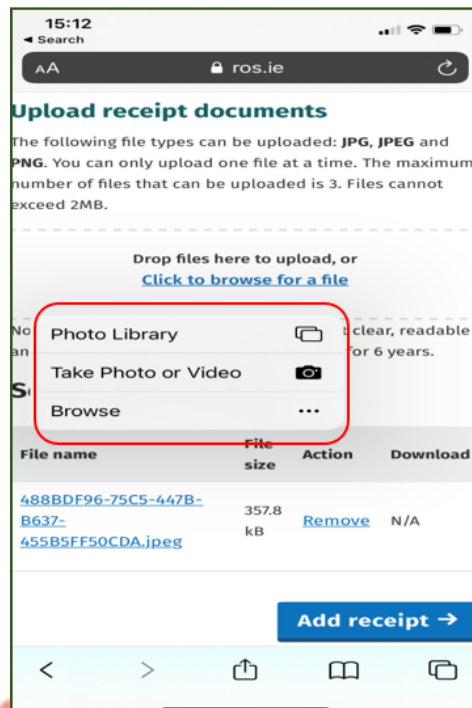
Figure 14: Image option screen for mobile device

Once the receipt image has been selected, it will appear under 'Selected Documents'.
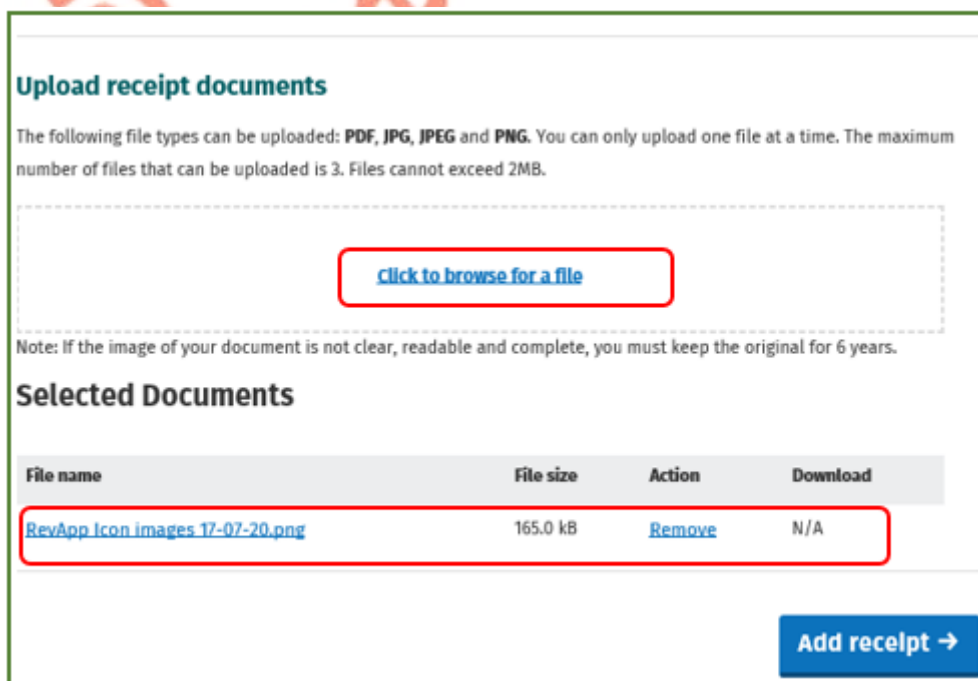
Figure 15: Image saved screen

You can add up to three images for each individual expense that you are recording. You can view or remove the image. If you remove the image for a mandatory category you must upload another image. Each image cannot exceed 2MB in size.

If your image exceeds the size limit you will receive a notification see Figure 16. To amend the size of your image you should go to settings on your mobile device and follow the instructions. You can then upload the image.
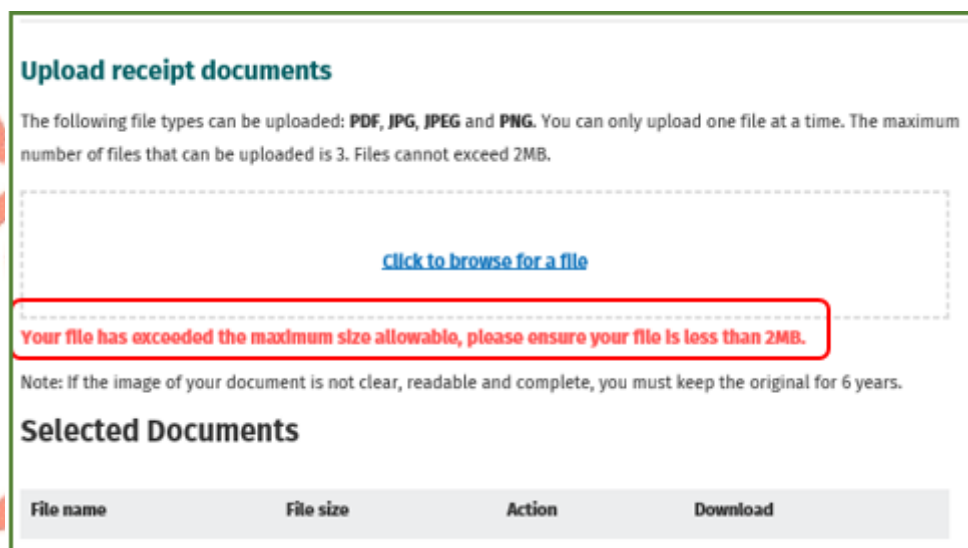
Figure 16: Image size exceeds 2MB message screen

If you do not save an image of a receipt on the Receipts Tracker, you must retain a copy of the original receipt for six years.

5.4   How to edit/amend or delete a receipt

Receipt details can also be viewed, edited or deleted by selecting the relevant receipt. On the Receipts Tracker homepage, you can choose the receipt to be viewed or edited by clicking 'View 20XX receipts' for the relevant year.

Figure 17: 'View 2021 receipts' screen

To display all receipts you have uploaded for the relevant year, you should then choose 'Show All Receipts' in the dropdown box. Click 'View/Amend/Delete' for the receipt you wish to amend or delete.

Figure 18: 'View 2021 Receipts' and details of receipts uploaded screen

The details you previously entered will be shown on screen. You can amend the relevant details or delete the receipt. In the example in Figures 19 and 20, the refund amount received from a third party needs to be amended. When the amended details have been entered and the 'Save changes' box is clicked, the amended receipt details will be updated on the summary.

Figure 19: Expense details and 'Save changes', 'Delete this receipt' screen.

Figure 20: 'View 2021 receipts' showing amended details

You can also delete a receipt by following the steps for editing a receipt and then clicking 'Delete this receipt'. A notification will be provided to inform you that the receipt will be permanently deleted. If you wish to proceed with the deletion, you should click 'Yes, delete this receipt'. The receipt will be deleted and will not be available to use in the completion of your Income Tax Return.
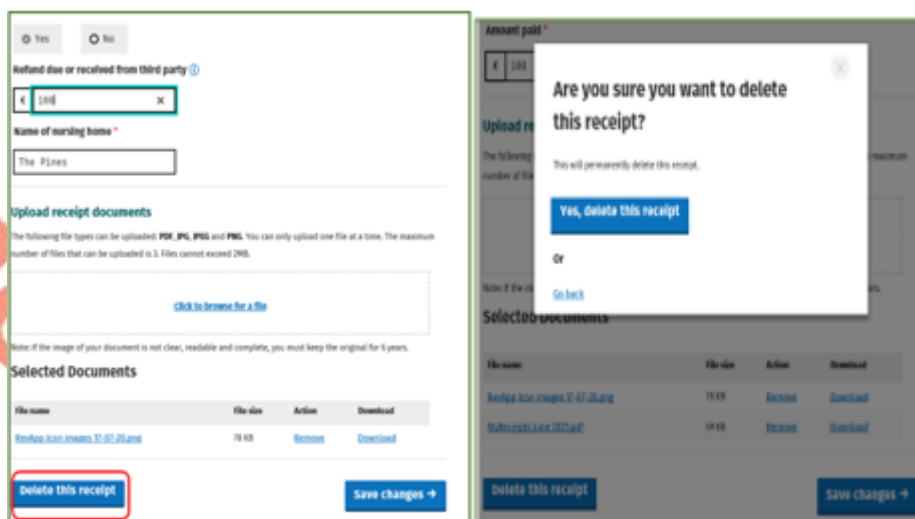

Figure 21: Receipt to be deleted screen and confirmation of deletion screen

You will not be able amend or delete an expense which you have already claimed in real time. These expenses will be available to view only.

6   How to access Receipts Tracker on ROS

The Receipts Tracker is available on ROS on www.revenue.ie. If you wish to use ROS in the Irish language, select 'Gaeilge' on the top right-hand side of the sign-in screen.
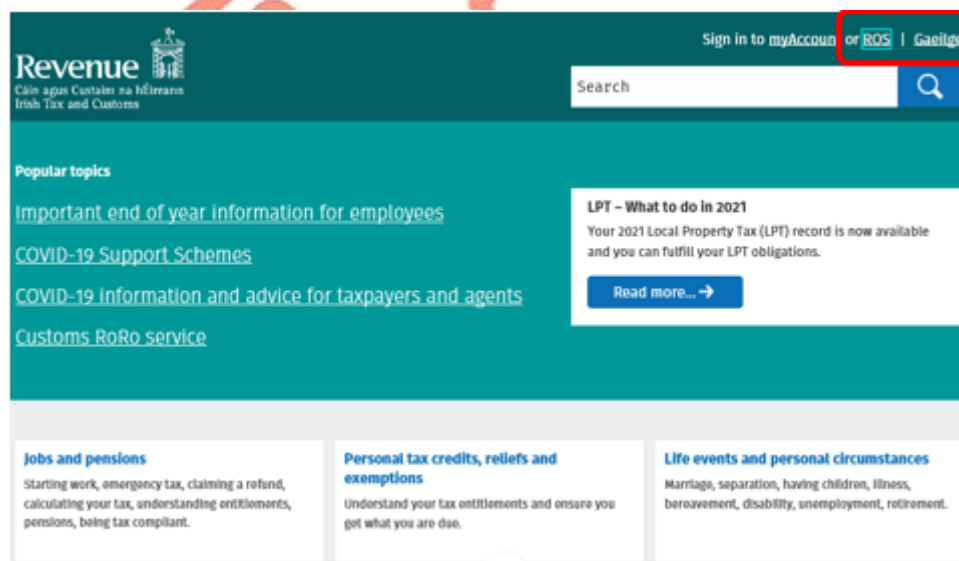

Figure 22: 'ROS and Gaeilge' options on Revenue homepage

If you are a ROS registered customer, you will access ROS in the normal way by selecting the ROS certificate and entering your password.

Figure 23: ROS Secure Login page

Once you have accessed your ROS account, you should scroll down to 'Other Services' and click on 'Receipts Tracker'.

Figure 24: ROS homepage and 'Receipts Tracker' on 'Other Services' screens

To upload receipts details and expenses, view previously uploaded receipts or make a claim for real time credits using the Receipts Tracker, please follow the instructions in sections 5.1 to 5.4.

7   Agent access to upload receipts details and images

Agents can access the Receipts Tracker on behalf of their clients to upload receipt details for Health and Nursing home expenses by clicking on 'Manage Your Tax 20XX'.
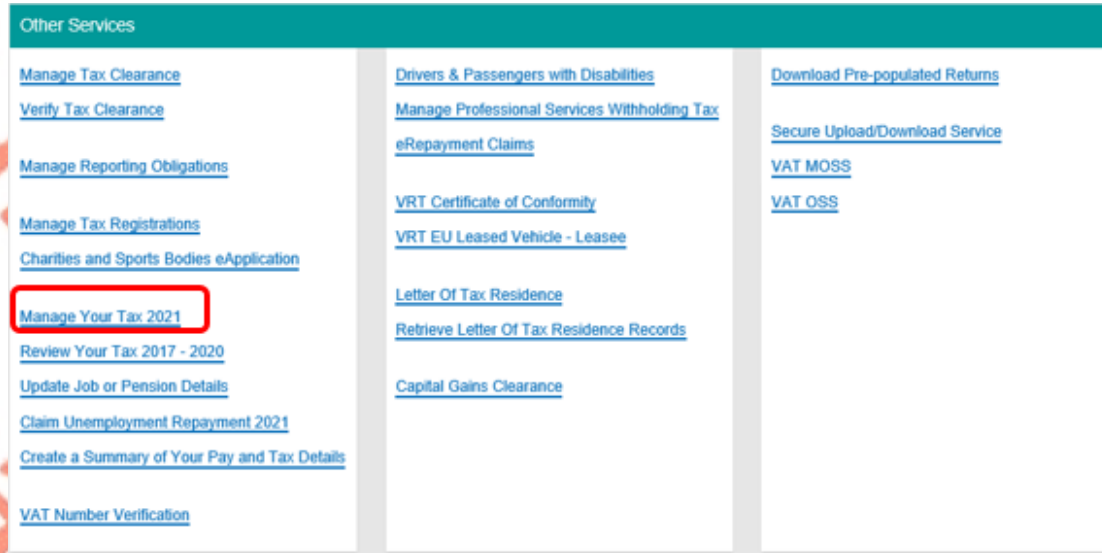

Figure 25: Agent access to 'Manage Your Tax 20XX' screen

Agents can upload the receipts for the current year by clicking on 'Manage receipts'.

Figure 26: 'Manage receipts' screen

To add new receipt details and image agents can click on 'Add a new receipt' and follow the steps set out in sections 5.1 to 5.4. Agents can also make a claim for real time credits by selecting 'Claim credit'.
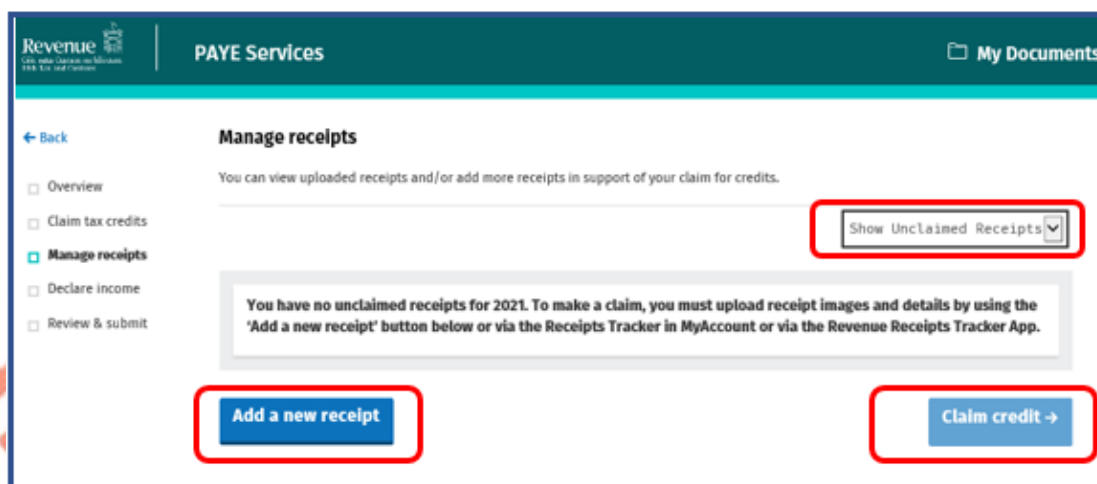
Figure 27: 'Add a new receipt' screen

8 Trouble shooting and help

8.1 Revenue help

If you experience difficulty using Receipts Tracker you can contact Revenue Online Service Helpdesk on 01 738 3699 (+353 1 738 3699 for international callers) between 09:00 and 17:00 (Monday to Friday) or email roshelp@revenue.ie.

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