

ROS - Return Preparation Facility (RPF)

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1 Introduction

The Revenue Online Service (ROS) can be used for both 'online' and 'offline' filing.

When a filer is using an 'online' form, most of the forms have a 'Work In Progress' facility so that a form can be partially completed and the filer can save it and come back to it later to continue the filing. Where prepopulated returns are available, these are offered online.

Some filers use the ROS 'Offline' application and find it convenient to prepare returns, save the completed returns as files on his or her local computer and then upload those files later. Files are uploaded by logging into ROS and selecting the "Upload a form completed offline" option. Not all forms are available in the ROS Offline application.

A new Return Preparation Facility (RPF) is being developed to replace the ROS Offline application. The RPF will enable ROS agents/advisors and customers to complete forms without being logged into ROS and to save those forms as files on their local computer and upload the saved files to ROS later on.

The ROS Offline application will continue to be available until the RPF is established. Forms will be migrated to the RPF on a phased basis, and not all forms will be made available in the RPF. A small number of forms are only available to complete using the ROS Offline application.

Note: filers must Sign and Submit all Returns to be transmitted to Revenue in order to meet the filing obligations, irrespective of which ROS application is used.

2 What is the Return Preparation Facility?

The RPF is an application that can be used to prepare forms without logging into ROS online. Forms prepared and saved using the RPF must be uploaded using ROS Online to Sign and Submit the return (and thereby meet the filing obligation).

The RPF is accessed through a weblink or URL. Unlike the ROS Offline application, there is no install or upgrades required, and the weblink will always provide the up-to-date version of each form.

The RPF is only accessible using supported browsers which are currently Google Chrome, Microsoft Edge and Opera.

The RPF will allow filers to

- open a blank form,
- access a previously saved form, or
- access a pre-populated return downloaded from ROS online.

You can save an in-progress form as a file on your computer for later completion. When complete, you can upload the saved form to ROS online and proceed to Sign and Submit.

Time out

Filers should note that the RPF will time out after 30 minutes of inactivity, unlike the ROS Offline application. Users can reset the timer by validating the form or moving to a new tab.

If the RPF times out, any unsaved changes to the form will be lost. We recommend saving any form/work in progress regularly and using easily identifiable file names.

As with the existing ROS Offline and Online applications, returns such as the Form 11 may only be amended using ROS online. It is not possible to upload a second Form 11 for a period for which a return has been filed already.

3 Pilot Phase

Initially, as part of a pilot trial phase in the development, the link to access the new facility will be available only on request from roshelp@revenue.ie. During the trial phase, the Income Tax Form 11 for the 2020 period will be the only form available in the RPF.

We would like to gather feedback on the new facility and use this to inform the ongoing development of the RPF. Feedback can be provided to roshelp@revenue.ie.

At the end of the trial phase, the RPF will be made available from a link on the ROS Login screen. A small number of forms will be available initially and these will be added to over time. The option to use the ROS Offline application will remain in place until the RPF is established.

4 How to use the Return Preparation Facility

ROS agents/advisors and customers will access the RPF initially through a link provided by the ROS Helpdesk (roshelp@revenue.ie). The link will be made available on the ROS Login screen after the Trial Phase is complete.

The following instructions use the example of an Income Tax Form 11 for 2020.

4.1 Opening a Form

Select both the Return Type "Form 11" and the Period "01/01/2020 - 31/12/2020" from the drop-down menus before proceeding to prepare a return.

To start with a blank return, click the "Prepare Return" button.

To work on a previously saved or a downloaded form, select the "Click here to open a previously saved form" option before clicking the "Prepare Return" button. Please note that a return type and period must be selected for this option to become active. A further window will open so that you can browse to the file you want to select to continue work on. The selected file must match the expected form type, as set out in [Appendix 1](#).

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Return Preparation Facility

Return Preparation Facility

This facility allows you to create returns and save them as files on your computer. To meet your return filing obligations, you must login to ROS and sign and submit the completed returns. (That is, you must upload and submit any forms completed offline in order to have submitted a return.)

Note: there is a 'time out' on this facility. If the screen is not active for 30 minutes or longer, the time out will be triggered and you will lose any unsaved work. Therefore it is important to save your work-in-progress regularly to avoid this (there are options to 'Save' or 'Save As' at the top of each subsequent screen as you progress through the form).

Please select the Return Type:

Form 11

Please select the Period:

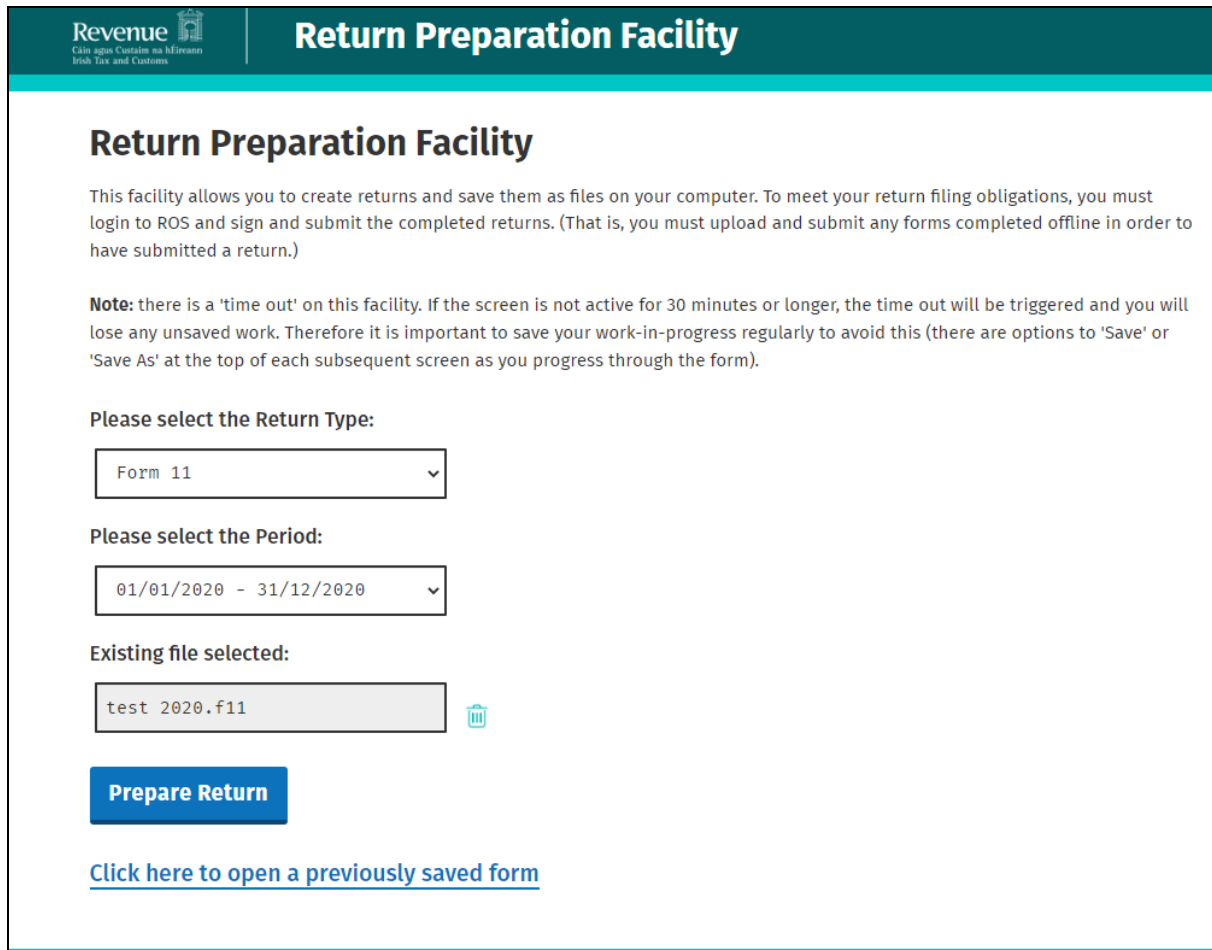
01/01/2020 - 31/12/2020

Prepare Return

[Click here to open a previously saved form](#)

Figure 1 Return Preparation Facility Landing Page, with Form 11 2020 selected

A bin icon is available if needed, for the selected file to be unselected.



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Return Preparation Facility

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Note: there is a 'time out' on this facility. If the screen is not active for 30 minutes or longer, the time out will be triggered and you will lose any unsaved work. Therefore it is important to save your work-in-progress regularly to avoid this (there are options to 'Save' or 'Save As' at the top of each subsequent screen as you progress through the form).

Please select the Return Type:

Form 11

Please select the Period:

01/01/2020 - 31/12/2020

Existing file selected:

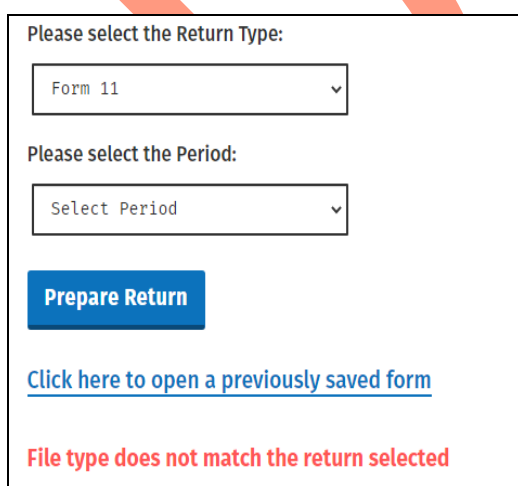
test 2020.f11

Prepare Return

[Click here to open a previously saved form](#)

Figure 2 Return Preparation Facility Landing Page, with previously saved Form 11 2020 selected

You will be presented with an error message if the incorrect file type for the previously saved form is selected.



Please select the Return Type:

Form 11

Please select the Period:

Select Period

Prepare Return

[Click here to open a previously saved form](#)

File type does not match the return selected

Figure 3 Return Preparation Facility Existing Form – Error

4.2 Prepopulated Forms

Prepopulated forms are available in most circumstances for the income tax Form 11 and the corporation tax Form CT1. Where possible, forms are prepopulated with details from the previous year's return or with data available in respect of the current tax year from Revenue or third-party sources; as an aid to filers to complete the current year's return. It is the filer's/taxpayer's responsibility to ensure that the details filed are correct, regardless of prepopulated data provided. Prepopulated forms are not available in all circumstances.

Prepopulated forms, when available, will be offered when completing a form online. A prepopulated form may also be downloaded from the option under Other Services when logged on to ROS Online. The form will save to the Downloads folder. It is recommended that the file is moved/saved to a suitably named folder for ease of access, e.g. a Form 11 could be moved to a folder such as C:\ROS\Form 11. Forms downloaded in this way may be accessed using the RPF.

5 Working on the Form

Once you click on the Prepare Return button, you are presented with the selected form.

Note: there is a 'time out' alert on this facility. If the screen is inactive for 30 minutes or longer, the time out will be triggered, and you will lose any unsaved work. Therefore, it is important to save your work regularly to avoid this.

The timer is reset when you click the buttons "Validate", "Save As", "Save" or move between tabs in the form.

Validate Button

To activate the "Save As" and "Save" buttons, you must first click the "Validate" button. If there are any errors on the form, these will be highlighted. You must rectify the errors and validate again to activate the 'Save' buttons.

After clicking "Validate" the information on that page of the form will be locked until you move to another page in the form.

Save As Button

After successful validation, the first time you save a newly opened form, you must select "Save As". This will open the file chooser window and you must navigate to the folder where you want to save the form. After this initial save, you can use the "Save" button.

We recommend using folder names such as C:\ROS\Form 11 to help in finding and accessing your saved forms in the future.

You must use the 'Save As' option even if you have opened a previously saved form.

Save Button

The "Save" button can be used after the first "save as" of a newly opened form. Clicking "Save" will overwrite the previously saved version of the form in the saved location.

Close Button

The "Close" button allows you to return to the Return Preparation Facility landing page without saving.

5.1 Completing the Form 11 2020 Return

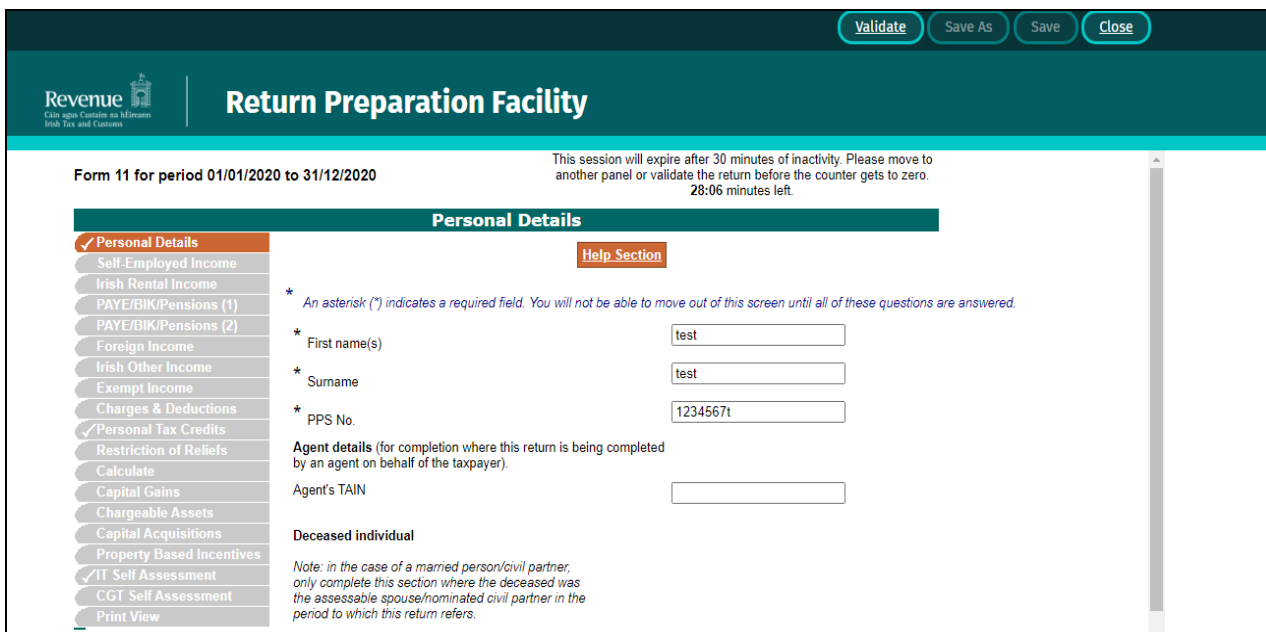


Figure 4 Return Preparation Facility – Form 11 2020

All relevant panels of the Form 11 need to be completed.

To enable the ‘Save As’ option in a new Form 11, you must complete both of the Personal Details pages and you must visit (click into) the IT Self-Assessment panel. These are the minimum steps needed before the return can be saved.

If you are accessing a downloaded prepopulated form, you must also click into each of the prepopulated panels. These panels are marked with a yellow tick symbol which will change to white after you visit that page.

On the Form 11, there is a link on the Print View page “Click to print this page”. This will print the full details of the return if needed.

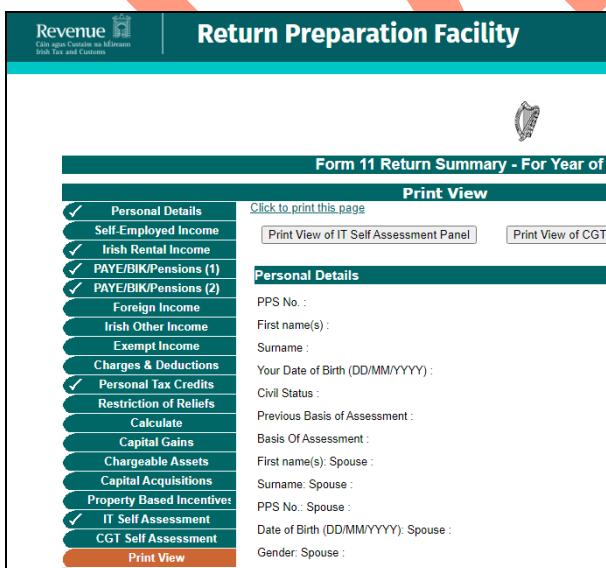


Figure 5 Return Preparation Facility – Form 11 2020 Print View Summary

The completed returns must be saved to the user's computer. Partially completed returns should be saved for later ROS submission.

Help with completing your 2020 income tax return and self-assessment is available on www.revenue.ie. The [Guide to Completing 2020 Pay & File Self-Assessment Returns](#) is a comprehensive guide for all the panels and questions on the Form 11.

6 How to Upload and submit the Form 11 Return to ROS

Once you have completed and saved the Form 11 2020 return, you must upload this saved return through ROS. You can do this by logging into ROS, scrolling down to the tab 'Upload Form(s) Completed Offline' (TAIN Services/My Services screen) and selecting the Form 11 from the drop-down list and clicking on 'Upload Return'.

A dialogue box will open, click on the "Add File(s)" button on the left of the screen and select the F11 return (s) you want to submit to Revenue. You will need to navigate to the location on your computer where you saved the F11 return(s). Choose named F11 to upload and select 'Open'. Having added your F11 return(s), you must sign the return(s) with your digital certificate and submit to ROS.

You will receive an acknowledgement from ROS that the F11 return(s) has been filed.

7 Conclusion

The new process outlined in this TDM will be subject to ongoing review by Revenue. Therefore, feedback and suggestions for improvement on the RPF are welcome.

8 Appendix 1

The error message : "The file type does not match the return selected" will be displayed if you try to open a previously saved file that does not have the expected file extension for that form. The following table shows what file extension is expected for each form available in the RPF.

If you have a valid data file with an extension such as .xml or .txt, you must rename the file to access it using the RPF.

Form Type	Expected file type	Example	Available in RPF
Income Tax Form 11	.f11	1234567AB 2020 Jane Doe.f11	2020 9/5/22