MyEnquiries: Submitting and Managing Enquiries in myAccount

Part 37-00-36B

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The information in this document is provided as a guide only and is not professional advice, including legal advice. It should not be assumed that the guidance is comprehensive or that it provides a definitive answer in every case.

Summary

Guidance relating to specific aspects of registering for and using MyEnquiries is available in linked manuals:

Part 37-00-36 MyEnquiries

- Part 37-00-36A Access to and Registering for MyEnquiries
- Part 37-00-36B MyEnquiries: Submitting and Managing Enquiries in myAccount
- Part 37-00-36C MyEnquiries: Submitting and Managing Enquiries in ROS
- Part 37-00-36D MyEnquiries: Tracking of Enquiries
- Part 37-00-36E MyEnquiries: Notifications about Enquiries

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1 Submitting and managing enquiries (Individuals)

This section describes how an individual can submit and manage their enquiries.

To submit MyEnquiries via ROS, refer to Tax and Duty Manual Part 37-00-36C.

1.1 New Procedures for individuals with only PAYE income

New arrangements were introduced in early 2022 to ensure a more streamlined approach for dealing with enquiries submitted by myAccount customers. When a PAYE customer generates an enquiry, they are required to complete the 'message field box' and Revenue's systems will automatically direct the query to the appropriate team for follow up action. Additional information is included in paragraph 1.4 (Figure 3) of this manual (overleaf).

Customers receive a confirmation message when queries are submitted, and additional information is included in <u>paragraph 1.11</u> of this manual.

If MyEnquiries is accessed from ROS, the customer needs to select the category "Enquiry relates to" and the sub-category "More specifically". This is shown in <u>paragraph 1.4</u> (Figure 4).

1.2 Enquiries Record screen

In the Enquiries Record screen, you can view, search for, or archive your enquiries and Revenue's replies. You can update an existing enquiry.

The Enquiries Record screen has eight columns, including an option to tick an enquiry to be archived. The other seven columns can be sorted by clicking on the sort option at the top of the column. The Enquiries Record screen is generally sorted by date (the third column) with the most recent enquiry at the top of the list. The Record can be sorted by the other columns, for example by 'Reference', 'Status' or the 'flag'.

To view the details of a specific enquiry, click on the relevant row on the Enquiries Record screen. An enquiry can be 'flagged' as a 'to-do' or 'completed' item.

Enquiries Record									
Tax Refere 1234567t	Tax Reference Number 1234567t								
Tax Refere	Tax Reference Type CUST								
Previous	Enquirie	s	5	Search previous enquiries					
Archive	Enquiry ID	Date 🕴	Enquiry relates to	More specifically	Reference	Status			
	2005- 122006	2020/05/28 08:05	Tax Clearance	Tax Clearance Certificate		Revenue Initiated	Þ		
	1802-50628	2018/02/15 16:27	PAYE (PAY As You Earn) employee/pensioner - Other	Ceased Employment	test	Completed	▶		
	1704-12070	2017/04/06 12:43	Other than the above	My query relates to something else	MyE Test msg Ref MC1	Completed	▶		
Showing 1 to 3 of 3 entries Previous 1 Next									
Archive Ticked Items									
VIEW Archiv	View Archive								
Add Nev	w Enquiry	→							

Figure 1: Enquiries Record (Individual's screen))

1.3 Enquiries Record screen – Flag message as a 'to-do' item

Enquiries can be marked for follow up by clicking on the grey flag next to the enquiry – this will change the flag to red indicating that the enquiry has been flagged for follow up. When the enquiry is resolved, the flag can be clicked to mark it as complete.

Select for archive	Enquiry ID	Date 🔶	Enquiry relates to $\prescript{0}$	More specifically	Reference
	2005- 122006	2020/05/28 08:05	Tax Clearance	Tax Clearance Certificate	Click to mark complete.
	1603- 30977	2016/03/22 18:45	Official Use Only	TAC	Test message

Figure 2: Enquiries Record – Flagged as a 'to-do' item

1.4 'Add a new enquiry' screen

The 'Add a new Enquiry' screen opens when you click on the 'Add New Enquiry' button on the 'Enquiries Record' screen. The Tax Reference Number and Tax Reference Type fields are prepopulated with your tax details.

	MyEnquiries	
← Back	Add a new enquiry	
	Tax reference number	
	Tax reference type	
	CUST	
	My reference (optional) 🕕	
	You should not include a Tax Reference Number or other personal data as part of this reference (see Information tooltip).	
	For attention of (optional)	
	Enquiry details	
	Please enter further detail about your enquiry (up to 2,000 characters)	

Figure 3: Add a new Enquiry' (PAYE Individual's screen in myAccount)

	MyEnquiries
← Back	Add a new enquiry
	Tax reference number 09980980M
	Tax reference type CUST
	Enquiry relates to * 🕦
	Capital Acquisitions Tax
	More specifically * 🕕
	General CAT query
	More Info 🕕
	My reference (optional) 🕕
	You should not include a Tax Reference Number or other personal data as part of this reference (see Information tooltip).

Figure 4: Add a new Enquiry' (Non-PAYE Individual's screen in ROS)

1.5 'My reference' field

This field enables you to record a reference name or number to assist you in tracking your enquiries.

You should **not** include a Tax Reference Number or other personal data as part of this reference. The reference used in the 'My Reference' field is included in the email subject line that is sent when Revenue responds to the enquiry. That notification email is sent via standard email and is not encrypted. Revenue cannot guarantee that any personal and sensitive data, sent via standard email, is fully secure. Customers who enter personal data are deemed to have accepted any risk involved.

1.6 For attention of' field

The original function of this field was to assist in directing an enquiry to a particular person or section in Revenue by entering an appropriate email address. This practice has been discontinued and you should only make an entry in this field if you have been explicitly asked to do so by Revenue.

1.7 'Enquiry details' field

You should enter the details of your enquiry in this field. There is a limit in this field of 2,000 characters which should be more than adequate for most enquiries. However, if the limit is exceeded, the detail of the enquiry can be sent as an attachment.

You may receive an error message regarding invalid characters within the Enquiry Details field/text box, "Your message contains an invalid character. Please forward it as an attachment." This can arise if material is prepared in another application, e.g. Word or Excel, and copied into the Enquiry Details text box. If this error message persists you should forward your message as an attachment and enter a note to that effect in the Enquiry Details field.

1.8 'Email address' field

You should enter **your** email address in this field. It will be used only to notify you when there has been activity on your enquiry, such as when your enquiry has been replied to and you are prompted to check your Enquiries Record.

1.9 Attachments

You can attach documents to an enquiry subject to a file size limit of 10MB for individual files. The maximum number of attachments is 10.

The option to attach a file is only available after the 'Enquiry relates to' and "More specifically" fields are populated (when available).

A bin symbol is available after an attachment is added to allow an attachment to be removed if necessary.

The following file types can be attached: pdf, tif, tiff, txt, xls, jpg, jpeg, doc, docx, xlsx, P30, xml, dat, p35, p35L, p45, p453, c35, rct, vt3, f11, pay, 46g, 46gc, i38, transit, int, vie, eus, rom1, sd, f1f, f1, ct1, f35, dwt, cds1, csv, png, pptx, ppt, mht, htm, gif, msg, 0001, xps, odt, html, zip, p12, p12.bac, log, cfg, and 1.

🔲 R Home - RevNET 🛛 🛪 🏦 MyEnquiries	x +
← → C @ Ô https://www.ros.ie/online-enquiry-we	zb/occ?execution=e4s3
🛅 Managed favourites 🌓 ROS Wallboard 🌓 SD Wallboard 🔝 Cisco	🥂 RevNet 🏦 Revenue.ie 🇰 Finesse 🕒 LiveSupport 🕒 Callbacks 🕒 Passwords 🏦 Greenmile 🛲 Reskillros 🧔 Spira
	Please provide an email address below. Note your address will only be used to notify you when there has been activity on your enquiry. Email address *
	Filename can only be alphanumeric and max length of 50. What file types can 1 attach? Drop files here Ø Add files X Cancel upload
	38-01-03g.pdf
	Submit enquiry → * Denotes mandatory field.
<u>MyAccount Help</u> •– <u>Security</u> •– <u>Privacy</u> • <u>Accessib</u> Language: Gaeilge	ility. • Disclaimer

Figure 5: Attachment options on the 'Add a new Enquiry' screen

Note: Users are advised to take care in the file names of attachments. In particular, users should avoid having commas, dots or other symbols in the file name of the attachment. Incorrectly named attachments could result in the MyEnquiries system not recognising the attachment as an acceptable 'file type' (as above). Trying to upload an incorrect attachment may cause an error in the enquiry and could result in content entered in the enquiry up to that point being lost.

1.10 Submit Enquiry

When you click on 'Submit Enquiry', the enquiry is viewable on your Enquiries Record screen (with a status of 'Received').

Enquiries Record									
Tax Referenc	Tax Reference Number								
Tax Referenc	Tax Reference Type CUST								
Previous E	nquiries			Search previous enquiries					
Archive	Enquiry ID	Date 🔶	Enquiry relates to	More specifically	Reference	Status	\$ \$		
	2306-6394	2023/06/01 16:15	PAYE - General	PAYE Other		Received			
Showing 1 to	1 of 1 entries	Previous 1 Ne	<u>xt</u>						

Figure 6: Enquiries Record screen after submission of enquiry

1.11 Automatic notification that the enquiry was received

Revenue G Glie agas Gatalán na Marcann Jinib Tax and Custons		Hello, AAA AAA <u>Sign Out</u>
Dear Customer,		
Thank you for contacting Revenue, we h	ave received your enquiry.	
We are receiving a lot of calls and enqui	ries at the moment. We will respond to your enquiry as s	oon as we can. No further action is required by you at this time.
If you want to track the progress of your	r enquiry you can do so by viewing the 'Status' column wi	en you access MyEnquiries. This is available in both myAccount and ROS.
After you click on the enquiry, you will b	e taken to the "Interactions Screen," where you can see t	he department that will handle your enquiry.
Click here for additional details on track	sing your enquiry.	
Continue		

Figure 7: System generated reply to confirm that a PAYE Enquiry was received

The notification shown above is the standard notification issued for the bulk of enquiries submitted.

1.12 Other automatic notifications

There are processes in place for 'deemed clearance' in three areas of contact:

- Death Case Clearance (as per TDM <u>46-01-02</u>),
- CGT non-resident clearance (as per TDM 45-01-05), and

- CAT resident distributing deceased's estate to a non-resident beneficiary (as per CAT TDM <u>Part 2: The Statement of Affairs (Probate) Form SA.2</u> paragraph 4.1 and Appendix 1).

While the 'standard notification' may be issued initially, enquiries requesting 'deemed clearance' should generate an additional notification reflecting the 'deemed clearance' categories. Enquiries for 'deemed clearance' need to be submitted as per the guidance in the TDMs, including the use of specific text as part of the request. The 'deemed clearance' notification that is issued is included in the respective, relevant TDMs referenced and linked above.

2 Additional MyEnquiries facilities

2.1 Search function

The Enquiries Record is the list of your enquiries and Revenue replies. The Revenue reply is included on the original enquiry and does not appear separately on the Enquiries Record screen. You can view a specific enquiry by double-clicking on the required row. New unread messages appear in bold. A search facility is available to assist you locate a particular enquiry in the Enquiries Record by entering a key word, e.g. health expenses.

2.2 Archive facility

You can archive an enquiry by selecting the tick-box to the left of the Enquiry ID and clicking on the 'Archive ticked items' button. Once an enquiry is archived it will no longer appear in the Enquiries Record. Archived enquiries can be retrieved by selecting the 'View Archive' tickbox.

2.3 Export facility for enquiry thread

If you click on a particular enquiry on the Enquiries Record screen you are brought to a screen that shows all the interactions relating to that enquiry. The detail of the full enquiry thread can be exported to a PDF document by clicking the 'Save as PDF' button at the bottom of the screen. The PDF can be saved to your own computer.

	Gattlete			
				nado, ado produter uto Sign Cust
	MyEnquiries			
← Back	Enter a new update			
	16/03/2022 - Other than the above - /	Ay query relates to sor	mething else (test)	
		Status : Col Completed by Bus	mpleted iness Division	
	Test large pdf		Ø	
	* Enquiry details			
	Enter a new update			
	More Info 🕕			
	Attach supporting information Filename can only be alphanumeric and max le	neth of S0. 🕥		
	What file types can I attach?	•		
		Drop files h	ere	
		Add files × Cance	el upload	
	Submit			
	Save As PDF 📥			

Figure 8: Screen showing enquiry thread

Revenue Cáin agus Custaim na hI Irish Tax and Customs	Éireann		
	out of your Enquiry Thread in Subject to commercial rates	n relation to - HC Declaration - s wholly used as dwelling	
Enquiry I): 1503-1	- My Reference No.: 0	
Joe Blog	gs 24/03/2015 13:29		
Interaction Date	Enquiries and Responses		
18/03/2015 14:33	test		
23/03/2015 15:03	test reply		ĥ

Figure 9: Representation of PDF document

2.4 Notification that a Revenue response has issued

When Revenue issues a response to an enquiry an email will issue to you informing you that a response has issued and can be viewed in the Enquiries Record screen (Inbox) in MyEnquiries. The entry made by you in the 'My reference' field when submitting the original enquiry will be included in the subject line of the email notification.

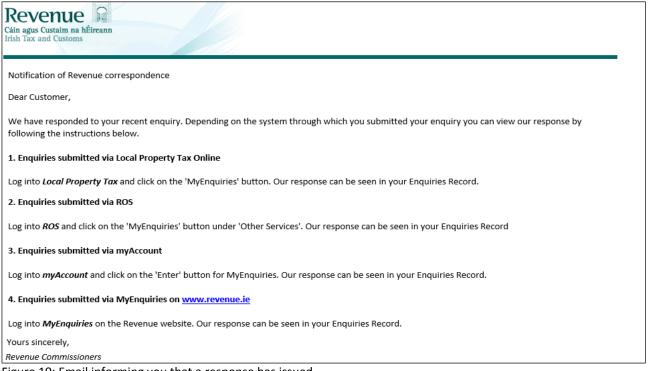


Figure 10: Email informing you that a response has issued

Appendix A: Submitting MyEnquiries through Local Property Tax (LPT)

MyEnquiries link from Local Property Tax (LPT)

MyEnquiries can be accessed from LPT by clicking on the 'MyEnquiries' button at the top of your LPT screen.

Local Property Tax including Household Charge arrears	CULUZ JYTTM (0001379J)
You can access your other records using the 'Revi	Review your records
PROP , TAX 35 <u>Cork County Council</u> (3276804OH)	筆 View Payment History
Contact us if the Local Authority is wrong	
Your Household Charge arrears: €200.00	Please update your HC arrears record before setting up a payment.
Current Status:	
 You have not yet paid your Household Charge arrears. You have an action outstanding for your 2013 LPT record. You have an action outstanding for your 2014 LPT record. You have an action outstanding for your 2015 LPT record. You have an action outstanding for your 2016 LPT record. Help me with this page 	Claim DIRT F.T.B Refund

Figure 11: LPT screen

You will be brought directly to the Enquiries Record screen (Inbox).

Revenue	my account						
		MyEnquiries					
	← myAccount homepage	Enquiries Record	d				
		Tax Reference Number					
		Tax Reference Type CUST					
		Previous Enquiries					Search previous enquiries
		Select for archive	Enquiry ID	Date	 Enquiry relates to 	More specifically	Reference
		You have no previous enquiries					
		Showing 0 to 0 of 0 entries	Previous Next				
		Archive Ticked Items					
		View Archive					
		Add New Enquiry \rightarrow					

Figure 12: Enquiries Record screen (Inbox

You can submit an enquiry by clicking the 'Add New Enquiry' button which brings you to the 'Add a New Enquiry' screen (as per above).