

Sri Lanka Inland Revenue -How to register as a tax agent-



How to register as a tax agent



If you would like to register as a tax agent for the first time, refer to	A. Register as a Tax Agent	Page 1
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NOTE: Only registered taxpayers may register as a Tax Agent. If you are not yet registered, please refer to the quick guide "How to register as a taxpayer"

A. Register as a Tax Agent

NOTE: Taxpayers currently not registered as Tax Agent can request with IRD to be an authorized Tax Agent. Only your authorised Staffs (Approver) can put up a request to IRD to register as a Tax Agent on your behalf.

Access <u>www.ird.gov.lk</u> and login to e-services. (Refer to the quick guide "How to login" for more details)

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2 Select Tax Agent Registration → Tax Agent Registration Request from the top menu

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- 9 Tax agent registration request details.
- 10 Supporting documents uploaded.





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Clic	B. Change Tax Agent Registration

Access <u>www.ird.gov.lk</u> and login to e-services.

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	Sri Lanka Inland Revenue -How to register as a tax agent-
2 Sel	lect Tax Agent Registration \rightarrow Change Tax Agent Detail Request from the top menu.
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	Qualification / certification obtained
	Date qualification / certification obtained 2015-01-01

Select the Date qualification / certification obtained. This is mandatory when the Type of tax agent is one of the following values. It is not mandatory if the Type of tax agent is different from these values. Note that the date should not be a future date.

- Attorney-at-Law
- Chartered Accountant
- Member of the Sri Lanka Institute of Taxation
- Registered Auditor

7 Select the Country where qualification / certification obtained. This is mandatory field and country must be selected.





	Supporting documents 🕓		
	Please attach supporting document(s)	below.	
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Sri Lanka Inland Revenue -How to register as a tax agent-



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	Select the Sub Da documents must reject the registra Click on the Proc Declaration I declare that the info * Name of de Desig * Cont Enter the Name of Enter the Designa Enter the Designa Enter the Confact further informatic Click on the Subr	ocument Type of the uploaded in ation if the requi- ceed button to r mation provided above clarant	and upload nto the syste ired docum eview the re re is true and cor re is true and cor larant. clarant. clarant. This ed. omit the ren	the document. This em by selecting the ents not uploaded. enew registration de mplete. 8 atory input. is a mandatory inp ew tax agent regis	is mandatory field of appropriate docum etails before submitt 7 5 <u>Submit</u> ut. This will be used b tration details reques	Amend all the superior type. IR	Opporting D may <u>Go to Main M</u> ntact should





D. Authorize Staff for Client

NOTE:

- Only Taxpayers currently registered as Tax Agent can authorize their Staffs to deal with Client's Tax matters. Otherwise, the system will show an appropriate message.
- > If you do not have Staff IDs (SSIDs) to transact on your behalf, you can apply at IRD Portal.
- > The Client should have already appointed you as a Tax Agent to deal with their Tax matters.
- Access <u>www.ird.gov.lk</u> and login to e-services. Click on <u>Authorisation of Staff/Tax Agent</u>: To authorise staff/Tax agent to act on your behalf for tax matters.

Taxpayer Registration	Authorisation	
	Create Staff Authorisation	
	Request SSID	
2	Change Staff Password	
•	• Create Tax Agent Authorisation	
	Authorize Staff for Client	
	View Company Authorisation	nt of Inland Revenue, Sri Lanka, A. Gardiner Mawatha, Colombo (
	 View Tax Agent Authorisation 	ved by Inland Revenue Departmen

2 Select Authorisation → Authorize Staff for Client from the top menu.

Тахра	ayer Registration Aut	chorisation			
eServ	ice Home :: Authorisation	:: Authorize Staff for Clier	nt		
То	authorise staff to act for	client			
Ple	ase enter the detail of the cl	ient and staff authorise to	act for client then click <search>.</search>		
3-	+ Client reference No.	TIN 🔻	300019188]	
4	* Staff reference No.	SSID v	200001390]	
			•		
			5	Search	
3 Ent	ter the Client refere s, your Client should	nce No. This is the I have already app	Taxpayer Identification N pointed you as a Tax Age	No (TIN) of your Client. As a pre-co ent and might have selected Tax t	ndition to type(s) for

- you to deal with. If the Client did not appoint you as a Tax Agent, you may not able to perform this step and system will show an appropriate message.
- Enter Staff reference No. This is your staff's ID going to handle your Client's Tax matters. If do not have Staff IDs (SSIDs), apply at IRD Portal.
- 5 Click on the **Search** button. The system will show the Tax Type(s) selected by your Client.

Authorise staff

List of servic	List of services to authorise				
📕 Value	added tax (financial service)				
	* Date effective from	Date effective to	* Role		
	2017-10-01	2018-12-31	PREPARER V		
	6	7	8		
			9 Save Cancel Go to Main Menu		





For each Tax Type selected by your Client, you should be able to see the Tax types listed here as shown in the previous image. You may choose all Tax type(s) selected by Client and assign it to your Staff (OR) choose select one/two Tax Types and assign it to your Staff and the remaining Tax Types can be assigned to another Staff.

Select the **Date effective from**. This shall not be earlier than today. From this date onwards, the Staff can deal with your Client's Tax matters.

- Select the Date effective to. This shall not be earlier than today. Until this date, the Staff can deal with your Client's Tax matters.
- 3 Select the *Role*. This can only *Preparer role*. This means that the Staff is able to prepare the tax submission and to save it as draft. However, the staff is not authorized to submit to IRD on your Client.
- 9 Client on the **Save** button.

Confirmation				
Taxpayer reference No Name of taxpaye	. TIN 300022995 r SEA 0345			_
	TRA	NSACTION DETAIL		
Client reference No.	Staff reference No.	Tax type	Date effective from	Date effective to
TIN 300019188	SSID 200001390	Value added tax (financial service)	2017-10-01	2018-12-31
Acknowledgement No Transaction Date/Time	11286 10 Authorise staff 2017-10-01 07:51:22 F	PM		
'our updates to authorisation record(s) has been processed successfully.				
			11 Print	Go to Main Menu

- You will receive an acknowledgement of your submission. Take note of the acknowledgement number in case you need to follow up with IRD on your registration .
- Click Print to print a copy of this acknowledgement.
- 2 Once the above step is completed, your Staff is ready to submit your Client's tax matters on your behalf. They can access the IRD Portal in order to perform this. (Refer to the quick guide **How to login** and choose option **C. Login as a tax agent**).



14



Go to Main Menu

E. View Company Authorisation Taxpayer Registration Authorisation Create Staff Authorisation Request SSID Change Staff Password Create Tax Agent Authorisation Authorize Staff for Client View Company Authorisation 13 View Tax Agent Authorisation 13 Select Authorisation → View Company Authorisation from the top menu eService Home :: Authorisation :: View Company Authorisation View/Edit/Delete authorisation Search for authorised records You can search for the staff/tax agent reference No. and click <Search>. Otherwise click <View All> to list all authorised records * Staff/Tax agent reference No. <Select a value> τ.

- 12 Enter the Staff ID/NIC/TIN of the Staff to search and click on the **Search** button to see the details of authorised staff to transact on your behalf. This includes Tax Agent that you have appointed/authorised on your behalf.
- 15 Click on the View All button to view all Company Staffs authorised to transact on your behalf. This includes Tax Agent that you have appointed/authorised on your behalf.

uthorised records		Reference No.	Category	Name	
		SSID 200001343	STAFF		ŕ
		SSID 200001342	STAFF		
		SSID 106224	STAFF		
16		SSID 106223	STAFF		
		SSID 106222	STAFF		
		SSID 106221	STAFF		
		SSID 106220	STAFF		
	Η	4 1 ► H		1	- 7 of 7 items

View All

Reset

Search

- 16 Click on the Staff ID **Reference No** hyperlink to **view** and **modify** the details authorised for the Staff to transact on your behalf. This includes Tax Agent that you have appointed/authorised on your behalf.
- Select the checkbox beside the Staff ID Reference No and click on the Terminate button to stop an authorised staff can no longer transact on your behalf. This includes Tax Agent that you have appointed/authorised on your behalf and you can terminate them if no longer act on your behalf.





	F. View Tax Agent Authorisation			
 NOTE: Only Taxpayers currently registered as Tax Agent can authorize their Staffs to deal with your Client's Tax matters. Otherwise, the system will show an appropriate message. 				
≻	You should have already authorized your Staffs to deal with Client tax matters. Refer to Client			
0	Access www.ird.gov.lk and login to e-services. Click on Authorise staff/Tax agent to act on your behalf for tax matters.			
	Taxpayer Registration Authorisation			
	Create Staff Authorisation Request SSID			
	Change Staff Password			
	Create Tax Agent Authorisation Authorize Staff for Client			
	◆ View Company Authorisation the ant of Inland Revenue, Sri Lanka, Science man A. Gardiner Mawatha, Colombo 02.			
	View Tax Agent Authorisation View Tax Agent Authorisation			
2	Select Authorisation → View Tax Agent Authorisation from the top menu.			
	eService Home :: Authorisation :: View Tax Agent Authorisation			
	View/Edit/Delete authorisation			
	Search for authorised records			
	You can search for the staff/tax agent reference No, and click < Search >. Otherwise click < View All> to list all authorised records			
	Staff reference No. <select a="" value=""></select>			
	Search View All Reset Go to Main Menu			
	Enter the Staff ID/NIC/TIN of the Staff to search and click on the Search button to see the details of			
3	authorised staff to deal with for your Client tax matters.			
4	Click on the View All button to view all Company Staffs authorised to deal with for your Client tax matters.			
	View/Edit/Delete authorisation			
	List of authorised records			
	Authorised records Reference No Category Name Client n			
	SSID 200001354 TAX AGENT STAFF D.M.DISSANAYAKE			
	SSID 200001116 TAX AGENT STAFF D.M.DISSANAYAKE			
	Image:			
	6 Terminate Cancel Go to Main Menu			
5	Click on the Staff ID Reference No hyperlink to view and modify the details authorised for the Staff to deal with your Client tax matters.			
6	Select the checkbox beside the Staff ID Reference No and click on the Terminate button to stop an			
	authorised staff can no longer deal with your Client tax matters.			





Taxpayer Services Unit

MAWATHA, COLOMBO 02

INLAND REVENUE DEPARTMENT

SIR CHITTAMPALAM A GARDINER

G. Help options



Walk in to the Taxpayer Services Unit- Monday to Friday 8:30 am to 4:00 pm (except public holidays)

The TPS unit can help you with:

- Registration as a Taxpayer and issuing of Taxpayer Identification Number (TIN)
- Registration for tax types
- Updating of Taxpayer profile
- Issuing of Personal Identification Number (PIN) to use e-Services
- Issuing of Clearance certificate
- Advice on tax responsibilities and obligations
- · Collection of returns and supporting documents
- Generation of new and replacement paying-in slip
- Obtaining the payment voucher number for blank paying-in slip

