

User Guide

View Submitted Financial Account Report

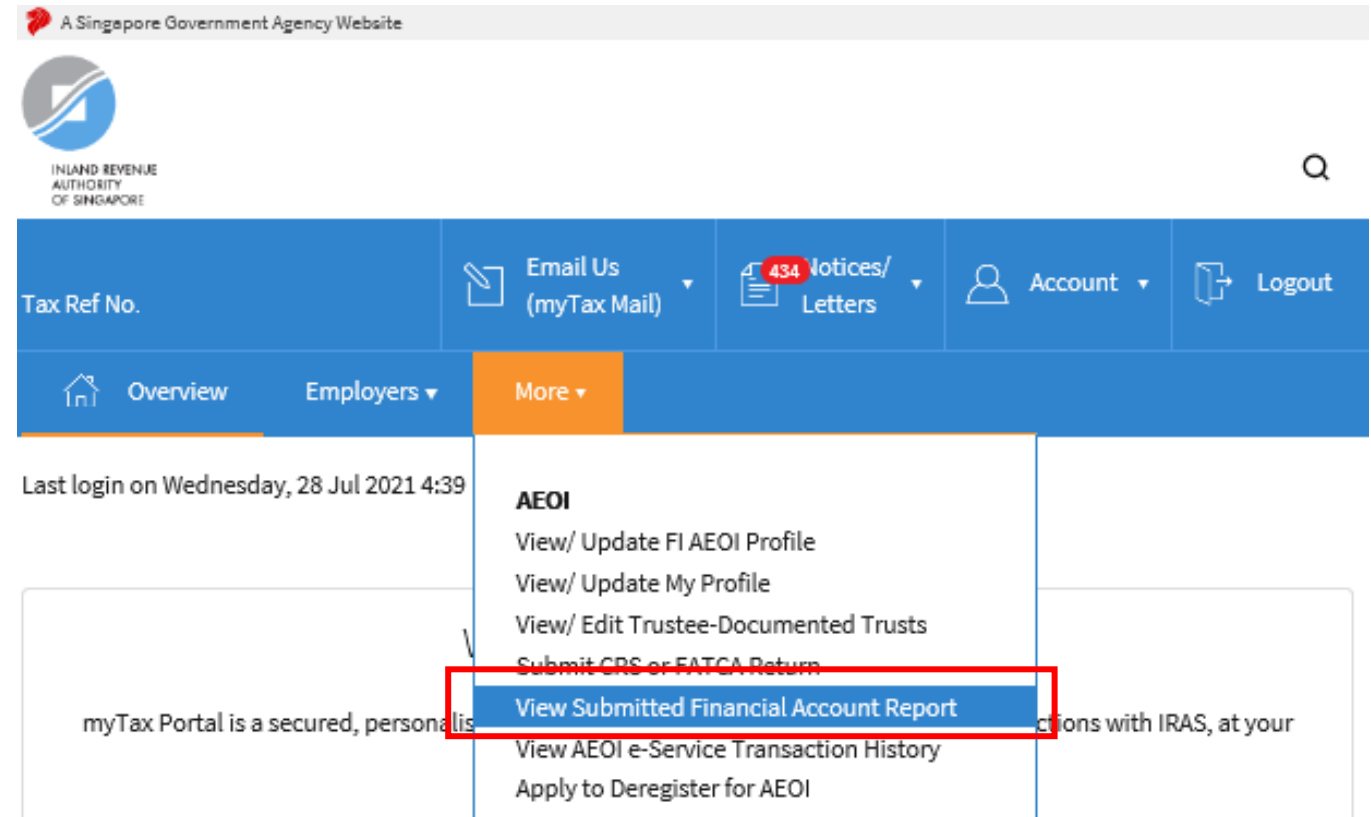
Contents

| S/N | Description | Page Number |
|-----|-----------------------------|----------------------------------|
| 1 | View Account Report Status | <u>Pg 3 - 7</u> |
| 2 | View Account Report Details | <u>Pg 8 - 13</u> |

1. View Account Report Status

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View Submitted Financial Account Report**



Step 2

At View Submitted Financial Account Report landing page,

Applicable for tax agents only:

- Select the appropriate entity ID type (e.g. ASGD, ITR, UEN-Business, UEN-Local Co, UEN-Others) and enter your client's tax reference number
- Click **"Next"**



If you are not a Tax Agent, skip step 2 and proceed to step 3.

Client Selection
for View Submitted Financial Account Report

Continue with

Client Tax Ref No. ⓘ

UEN-LOCAL CO ▼

NEXT

1. View Account Report Status

Step 3

- Under **Account Report Status**, select from drop down list, “Document Ref ID” or “Account No.”
- Click **“Search Status”**

View Submitted Financial Account Report

[SAVE AS PDF/ PRINT](#)

This search allows you to retrieve the latest status or details of a submitted financial account report.

Account Report Status

Select

SEARCH STATUS

Search for

OR

Account Report Details

SEARCH DETAILS

Step 4

- Select **Reporting Type** from the drop down list
- Select **Reporting Year** from the drop down list
- Enter **Document Ref ID**
- Click **“Search”**



You may search up to 5 Account Reports at one time

View Submitted Financial Account Report

[SAVE AS PDF/ PRINT](#)

Search For Account Report

| Reporting Type* | Reporting Year* | Document Ref ID* | Actions |
|-----------------|-----------------|------------------|---------|
| Select | | | CLEAR |

[+ Add another row](#)

Maximum 5 records

SEARCH**BACK**

Step 5

- Search results on the Account Report Status will appear based on the details submitted on the previous page

| Submission Status | Description |
|----------------------------------|--|
| Submitted | The account report has been received and processed by IRAS |
| Error | Error(s) has been flagged on the account report by IRAS or partner jurisdictions |
| Corrected/ Voided | User has searched for a DocRefID of a CRS account report that had been superseded by subsequent correction or void data |
| Corrected/ Amended/ Voided | User has searched for a DocRefID of a FATCA account report that had been superseded by subsequent correction, amendment or void data |

View Submitted Financial Account Report

[SAVE AS PDF/ PRINT](#)**Search Results**

Search For: Account Report Status

Reporting Type: FATCA

Reporting Year: 2020

Search By: Document Ref ID

Search Keyword: 111111.11111.LE.702.cbe11526-83da-4510-816f-894aa6a3aeb9

1 - 1 of 1 Record(s)

| Doc Ref No. | Account No. | Submission Date | Submission Status |
|--|-------------|-----------------|-------------------|
| 111111.11111.LE.702.cbe11526-83da-4510-816f-894aa6a3aeb9 | ACC01 | 20-Apr-2021 | Submitted |

[NEW SEARCH](#)

If the search results returns with “No Records Found”, please ensure that the Account No. or Account Report DocRefID that you are searching for has already been submitted via Submit CRS or FATCA Return e-Service.

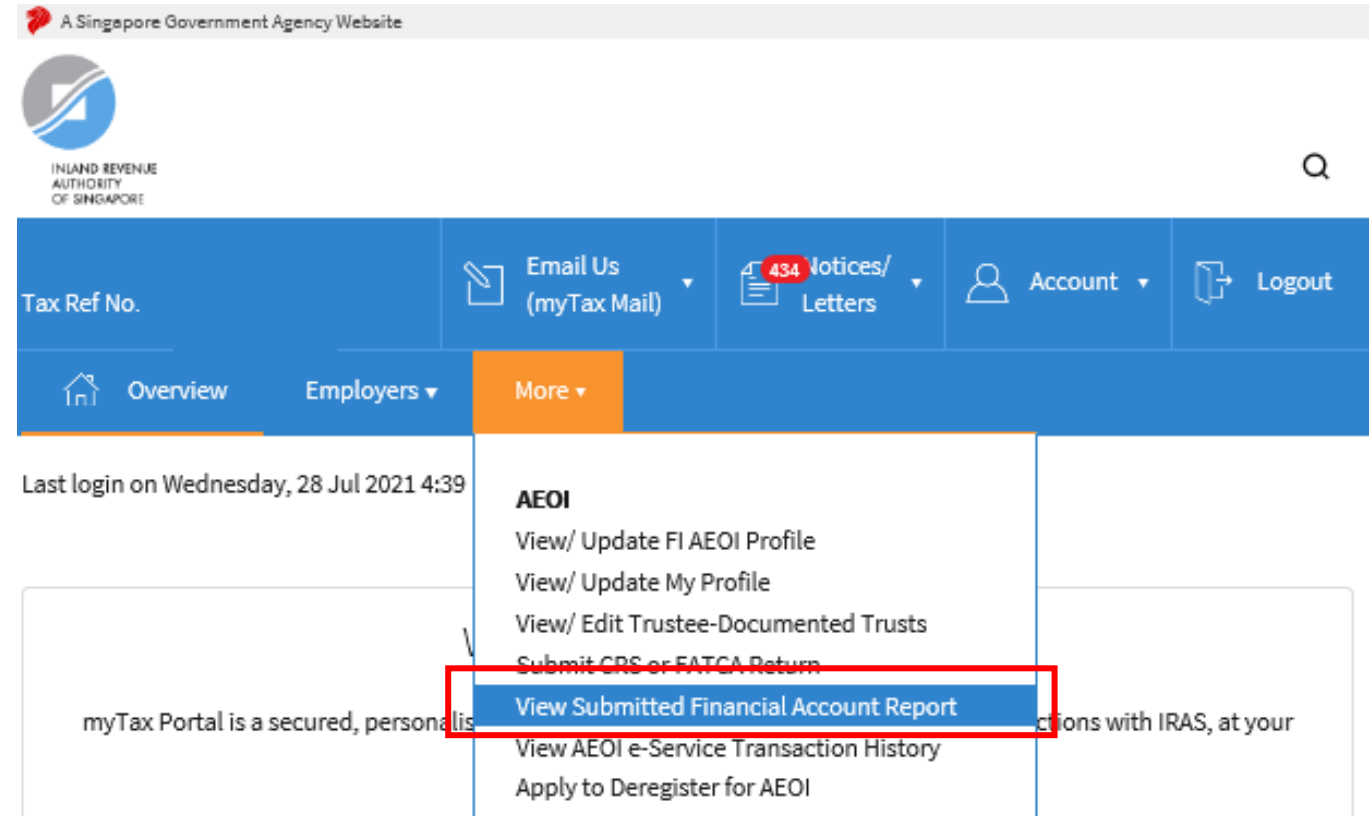
2. View Account Report Details

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View Submitted Financial Account Report**



Third party agents do not have access to view submitted financial account report details



Step 2

At View Submitted Financial Account Report landing page,

- Under **Account Report Details**, click “**Search Details**”

View Submitted Financial Account Report

 [SAVE AS PDF/ PRINT](#)

This search allows you to retrieve the latest status or details of a submitted financial account report.

Account Report Status

Select ▼

SEARCH STATUS

Search for

OR

Account Report Details

SEARCH DETAILS

2. View Account Report Details

Step 3

- Select **Reporting Type** from the drop down list
- Select **Reporting Year** from the drop down list
- Select **Search by** (i.e. “Document Ref ID” or “Account Number”) and input the respective Document Ref ID or Account Number in the **Keyword** field
- Click “**Search**”

View Submitted Financial Account Report

 [SAVE AS PDF/ PRINT](#)

Search For Account Report Details

Reporting Type*

Select ▼

Reporting Year*

Select ▼

Search by*

Select ▼

Keyword*

SEARCH

BACK

Step 4

- Search results will appear based on the account report details that submitted on the previous page
- Click “**Details**” for more information

View Submitted Financial Account Report

[SAVE AS PDF/ PRINT](#)

Search Results

Search For: Account Report Details

Reporting Type: FATCA

Reporting Year: 2020

Search By: Document Ref ID

Search Keyword: 211112.00000.ME.702.zzhhh-B
73C-EAAJQMB0001

1 - 1 of 1 Record(s)

| Doc Ref No. | Account No. | Submission Date | Submission Status | |
|--|-------------|-----------------|-------------------|-------------------------|
| 211112.00000.ME.702.zzhhh -B73C-EAAJQMB0001 | ABCD310001 | 12-Mar-2021 | Submitted | DETAILS |

[BACK](#)

Step 5

- The search will return with the details of the submitted financial account report
- The details of the account report will be presented in 4 different tabs:
 - Account Details
 - Account Holder
 - Controlling Person
 - Reporting FI

View Submitted Financial Account Report

 [SAVE AS PDF/ PRINT](#)

Account Details

Account Holder

Controlling Person

Reporting FI

Account Details

Document Reference ID Message Ref ID
 211112.00000.ME.702.zzhhh-B73C-EAAJQ 2020201499028C202011150747901
 MB0001

| Reporting Type | Reporting Period | Submission Status | Submission Date |
|----------------|------------------|-------------------|-----------------|
| FATCA | 31 Dec 2020 | Submitted | 12 Mar 2021 |

| Account Number | Undocumented Account | Account Balance | Dormant Account | Closed Account |
|----------------|----------------------|-----------------|-----------------|----------------|
| ABCD310001 | NO | USD 888,886.00 | NO | NO |

Payment List

| Payment Type | Payment Amount |
|--------------|----------------|
| Other | USD 12,321.00 |

NEW SEARCH

Published by
Inland Revenue Authority of Singapore

Published on 4 Jan 2022

The information provided is intended for better general understanding and is not intended to comprehensively address all possible issues that may arise. The contents are correct as at 4 Jan 2022 and are provided on an “as is” basis without warranties of any kind. IRAS shall not be liable for any damages, expenses, costs or loss of any kind however caused as a result of, or in connection with your use of this user guide.

While every effort has been made to ensure that the above information is consistent with existing policies and practice, should there be any changes, IRAS reserves the right to vary its position accordingly.

© Inland Revenue Authority of Singapore