

आयकर निदेशालय (पद्धति) Directorate of Income Tax (Systems), ए. आर. ए. सेंटर, भूतल,झण्डेवालान एक्सटेंशन ARA Centre, Ground Floor, E-2, Jhandewalan Extension, नई दिल्ली / New Delhi – 110055

Date:11.10.2023

F.No. DGIT(S)-ADG(S)-2/Profile View Access/2023-24

To,

All Principal Chief Commissioner(s) of Income-tax/ CCsIT All Principal Director General(s) of Income-tax/ DGsIT All Principal Commissioner(s) of Income-tax/ CsIT/ CsIT (Admin & TPS)/ CsIT (TDS) All Principal Director(s) of Income-tax / DsIT

Sir / Madam,

Sub: Access for Taxpayer Profile Views enabled for Jurisdictional Assessing Officers with respect to Jurisdictional PANs- reg.

Kindly refer to the above.

2. The Tax Payer Profile view on Insight portal provides users access to tax payers' information under various tabs such as ITR based information, Third Party Reporting's, Asset information etc.

3. Access to Taxpayer Profile Views at Insight has been enabled for Jurisdictional Assessing Officers in respect of PANs falling under their jurisdiction.

4. Jurisdictional Assessing Officers are required to take below mentioned steps to access Profile views of PAN available in their Jurisdiction:

- a. User needs to login to Insight Portal and select Profile Views option from menu available on Left side at Home Page.
- b. User needs to select "Taxpayer Profile Views" option and Enter PAN. Level 0 Detail of PAN will be displayed. (Path for accessing Tax Payer Profile view is hereunder: Insight Portal >> Taxpayer Profile View>> (Enter PAN lying in Jurisdiction)
- c. User needs to clickon PAN Hyperlink available in Search Result. In case PAN Searched is available in Jurisdiction of the user, user will be able to view Access Request Form with options "Access for Specified Reason" and "Access for Other Reason".
- d. User may select option "Access for Specified Reason". The Prefilled access form will be visible to user with option to select one of the two "Specified Reasons" (i. Recovery of Demand & ii. Proceedings Pending as per Income Tax Act, 1961) and enter Optional Remarks.
- e. Upon selection of the reason and submission of request, access

would be immediately available. The reason codes entered would be available for viewing to supervisors in the hierarchy of the user seeking access.(Path for viewing is hereunder: *Insight Portal>>Workspace>>Access Request>>Jurisdictional PAN Access Request*)

5. Officers in the JAO hierarchy starting from rank of ITO would be able to access taxpayer profile view in the said manner.

6. For accessing tax payer profile of PANs not lying in the jurisdiction or for accessing confidential information the JAO can avail existing request-based access form.

7. A quick reference guide with step-by-step screens is attached herewith (annexure A).

Yours faithfully,

Matrox

(MANISH MISHRA) Addl. Director General (Systems)-2

Copy to:

- PPS to Chairman, Member (IT &Rev), Member (Admin.& Faceless Scheme), Member (L& S), Member (Inv.), Member (TPS), Member (A&J), CBDT and DGIT(Systems)-2, New Delhi for information.
- 2. Nodal Officer of www.irsofficersonline.gov.in, DG systems corner, ITBA, Insight i-Library.

Addl. Director General (Systems)-2

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Annexure A:

Accessing Insight Portal

Step 1 Using link <u>https://insight.gov.in</u>, navigate to Insight Portal.

Step 2 Login into the portal using the ID and password registered with ITBA.

Step 3 If the user is mapped to multiple positions, then screen will be displayed for selection of particular charge. Select the relevant position description with which to log in.

Step 4 User will navigate to Home Page on successful Login.

Accessing Taxpayer Profile Views of Jurisdictional PAN

User needs to select "Profile" option available on Left side at Home Page and select Taxpayer Profile Views. User will be navigated to Search PAN Page.

User will enter PAN and Search Result will be displayed.

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n >	Modules Profiles Taxpayer PAN	Search for	•
E Modules	Search Taxpayer Profile Enter PAN	Annoscose?	
Profiles	Search Results for "AAFC \$2530P"	Search	
Q	PAN	++====================================	-
i-Search	Name		
120	Father's Name	NA	
Verification	Date of Birth / Incorporation	11-1D-2000	
Data	Income Tax Ward/ Circle	CIRCLE 1(3)(1), MUMBAI	<u>View Address</u>



Options available to Raise Access Request for PAN

Where PAN Searched by user is Jurisdictional PAN of the user, User will get Access Request Form with 2 options: -

- Access for Specified Reason
- Access for Other Reason

By default, the option "Access for specified reason" will be pre-selected. However, user will be able to update the option as "Access for other reason".

Welcome, NATE	-NEW)					Logout		
	odules > Profiles > Taxpayer	Master Profile (TMP)				•		
E	It seems you do not have the a	ccess rights to view profile for	this PAN. You can m	ake a request for granting viewing ri	ghts using below form.			
Profiles	Access for Specified Reason	Access for other Reason	1		No I do not want to r	equest for access		
0	Access Request ID: To be genera	ted				Status - New		
i-Search	Access For	SHENHATH ENTERIOR		Current Access Level	Level 0 - No Profile Acc	cess Right		
(ii)	Required Access level	C Level 1 - Basic Info All Confidential Inform	mation View 🧶 Leve ation View	2 - Restricted Information View O Le	vel 3 - Specific Confidential Information	on view C Level 4 -		
Ventication	Access Period *							
Data Management	Case ID *	l.	Select	Reason for Access*	Select	v		
M. Rusinger	Remarks	Enter Reason (Not ex	Enter Reason (Not exceeding 1000 characters)					
Intelligence	Approving Authority	18.						
Operations			Submit	Cancel	04-10-202	3 12 55 PM , IP Address		

Figure 2 Options available for Access Request Form

Accessing PAN for Specified Reason

- 1. The Access Request Form will be prepopulated for below mentioned fields.
 - $\circ~$ Access form will be prepopulated with PAN Name and PAN ~ for which Access is requested.
 - Current Access Level applicable for that PAN
 - o Required Access Level- this field will be pre-populated at level 2
 - Access Period field will be auto populated for 30 days.
 - Case ID field will be disabled.
 - Remarks will be enabled though not mandatory.
 - Approving authority will be left blank since Request is not getting submitted for approval.

=	1 seems you do not have the	access rights to view profile	for this PAN. You can m	ake a request for granting viewing rig	hts using below form.			
Modules					No I do not want to	request for access		
Profiles	Access for Specified Reason	Access for other Reaso	n					
Q	Access Request ID: To be gene	erated				Status - New		
	Access For	SHROWTHEATER	risoca (vorrainitario)	Current Access Level	Level 0 - No Profile Ad	icesa Right		
	Required Access level	ss level Level 1 - Basic Information View Level 2 - Restricted Information View Level 3 - Specific Confidential Information View Level 3 - Specific Confidential Information View						
Verification	Access Period *	30 v day(s) (maximum up to 30 day(s))						
B					1 12/10/07			
Data Management	Case ID *		Select	Reason for Access*	Select	~		
- All Russianas	Remarks	Enter Reason (Not	Enter Reason (Not exceeding 1000 characters)					
Dusiness	TO NAMES YON DARKS IN CONTRACTOR							

Figure 3 Access Request form for specified Reason

- 2. Reason for Access will have values as per detail below. User will be able to select one reason.
 - $\circ \quad \text{Recovery of Demand} \quad$
 - Proceedings pending as per Income Tax Act 1961
- 3. Remarks will be enabled though not mandatory.
- 4. On click of submit button, success message will appear and on confirmation of success message user will be navigated to Master Profile Tab of profile views of PAN.

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	Profile	view for V)	Profile	Summary					
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Q I-Search AI Filter									
(D)	1	Texpayer Type: Individual (Proprietor)			*				
Varification	2	Partner in 4 firms			*				
Vonacodon	3	Director in 3 companies			*				
B	4	Key shareholder in 2 companies	2						
Data Management	5	Return for AY 2018-19 filed in ITR 3 on showing income of Rs. 23,00,000	*		*				
7.4	6	Revised return for AY 2018-19 filed in ITR 3 on showing Income of Rs. 22,00,000			*				
Business	7	GTI of Rs. 34,00,000 and exemption/deduction of Rs. 12,00,000 for AY 2018-19			>				
Bud had at 10 " inc of all		Off of Na. 34,00,000 and examption/detaction of Na. 12,00,000 for A1 2010-19							

Figure 4 Navigation to Profile Views on successful Submission of Request

- 5. The request log will be created and visible to user and all supervisors in hierarchy under "Workspace>>Access Request>> Jurisdictional PAN Access Request" tab.
- 6. Access Request submitted by JAO will be visible in read only mode on click of hyperlink available under "Activity" column.

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* > *	Voreapace	Access Request				
	Pending to	or Action Taken Jurisdictional P	PAN Access Request			
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Profiles	1	Level 2 - Restricted Information Vie	IA S	HETTY ITO-1(4), LUCKN	OW -NEW 03	-10-2023
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	1	ndia.gov.in 🌮	Copyright CI Income Tax Departme	nt, Ministry of Finance, Government	of India. Entrust	

Figure 4 Request visible in Workspace

- 7. In case user is trying to access same PAN Second time, selection of reason will not be prompted.
- 8. The above access will be allowed for period of 30 days by default. And after expiry of 30 days the access will be revoked.
- 9. User will be able to submit request for Accessing Level 3 or Level 4 of Information as per existing Access Request flow (With Approval Flow).
- 10. Following Tabs under TAS (Taxpayer Annual Summary) will not be visible to the user.
 - TAS>>Information>>Uploads>> "Reference Report" Tab
 - TAS>>ITBA Proceedings Tab

Accessing PAN for Other Reason

1. User will be able to select option "Access for Other Reason" and the form as displayed below will open.

``````````````````````````````````````	odulos Profiles Taxpayer	Master Profile (TMP)		(07)			
E Modules	1 seems you do not have th	e access rights to view profile for this PAN. You can n	nake a request for granting viewing rig	hts using below form. No I do not want to request for access			
1	Access Request ID: To be gen	Status - New					
Profiles	Access For	(PL)	Current Access Level	Level 0 - No Profile Access Right			
I-Search	Required Access level	Evel 1 - Basic Information View O Level 2 - Restricted information View O Level 3 - Specific Confidential Information View O Level 4     -All Confidential Information View					
Verification	Access Period *	t v day(s) (maximum up to 90 day(s))					
Bata	Case ID *	Select	Reason for Access*	Select			
Management	Remarks *	Enter Reason (Not exceeding 1000 characters)					
Business Intelligence	Approving Authority	ADDL CIT(HQ)(ADMN)&TPS CHENNAI					
ф <mark>о</mark> Operations		Submit for Appr	Cancel	02-03-2023 12 15 PM , IP Address			

Figure 5 Access Request for Other Reason

- 2. User will be required to fill all mandatory fields i.e. Required Level of Access, Access Period, Case ID or Reason for Access and Remarks. Out of Case ID and Reason for Access, one of the fields is mandatory.
- 3. On clicking the "Submit for Approval" button the form will be submitted for Approval to Supervisor in hierarchy.
- 4. Access Request will be visible in Workspace for Action by Supervisor and Approving Authority.



Figure 6Access Request tile available in Workspace

5. Access Request will be visible to Initiator in Workspace under "Action Taken " Tab along with current status i.e. Submitted for Approval or Approved.

Modules	Pen	iding for Action Action	Taken							
Profiles	O F	Filters Jested Access Level	Related Case Type	Last Action taken by me	Current Status	Pending Since				
0						mm/dd/yyyy	Go Go			
i-Search	#	Requested Access Level	Requested For	Related Case Type	Related Case ID	Request Initiated by	Last Action Taken by Me	Current Status	Pending With	Pending Since
/erification	31	Level 2 - Restricted	R/	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-202
Data anagement	32	Level 2 - Restricted	R	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-202
a Business	33	Level 2 - Restricted Information View	R	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-202

Figure 7 Access Request status available in Action Taken Tab for Initiator

6. Access Request will be visible to Supervisor and Approving Authority in Workspace under Access Request >>Pending for Action Tab for necessary action on the Request. On clicking the hyperlink available under "Requested Access Level" column, details of request submitted can be viewed along with action buttons for Approval or Rejection of Request.

■ Modules	Pend	ing for Action Action Taken						
A Profiles	O Fi	Iters Isted Access Level Related	d Case Type Received f	From Current St	atus Pending Since	Z 🗖 Go		
Q, i-Search	#	Requested Access Level	Requested For	Related Case Type	Related Case ID	Request Initiated by	Current Status	Pending Since
Verification	1	Level 4 -All Confidential Information View	BELAMKAR EN	2	÷.	ITO(HQ) (ESTATES) CHENNAI	Sent Back	18-01-2023
-	2	Level 1 - Basic Information View		IT Return (e- Sahyog)	111808631617	ITO(HO) (ESTATES) CHENNAI	Submitted for Approval	05-01-2021
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Figure 8Access Request available for Action for Supervisor and Approving Authority

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