

आयकर निदेशालय (पद्धति)
Directorate of Income Tax (Systems),
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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.

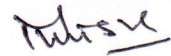
Kindly refer to the above.

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 click on 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,



(MANISH MISHRA)

Addl. Director General (Systems)-2

Copy to:

1. 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

Annexure A:

Accessing Insight Portal

Step 1 Using link <https://insight.gov.in>, 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.

The screenshot shows the 'Search Taxpayer Profile' page in the Insight Portal. The breadcrumb trail is: Modules > Profiles > Taxpayer > PAN Search for [AAFC52530P]. The search results for 'AAFC52530P' are displayed in a table:

Search Results for "AAFC52530P"	
PAN	AAFC52530P
Name	[REDACTED]
Father's Name	NA
Date of Birth / Incorporation	11-10-2000
Income Tax Ward / Circle	CIRCLE 1(3)(1), MUMBAI

There is a 'View Address' link at the bottom right of the results table.

Figure 1 Search detail of PAN

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”.

The screenshot shows the 'Access Request Form' in the Insight Portal. The breadcrumb trail is: Modules > Profiles > Taxpayer > Master Profile (TMP). A warning message states: "It seems you do not have the access rights to view profile for this PAN. You can make a request for granting viewing rights using below form." There are two radio buttons: "Access for Specified Reason" (selected) and "Access for other Reason". Below the radio buttons, the form fields are:

Access Request ID: To be generated		Status - New
Access For	[REDACTED]	Current Access Level: Level 0 - No Profile Access Right
Required Access level	<input type="radio"/> Level 1 - Basic Information View <input checked="" type="radio"/> Level 2 - Restricted Information View <input type="radio"/> Level 3 - Specific Confidential Information view <input type="radio"/> Level 4 - All Confidential Information View	
Access Period *	30 day(s) (maximum up to 30 day(s))	
Case ID *	Select	Reason for Access* Select
Remarks	Enter Reason (Not exceeding 1000 characters)	
Approving Authority	-	

At the bottom, there are 'Submit' and 'Cancel' buttons. The footer shows the date and time: 04-10-2023 12:55 PM, IP Address: [REDACTED].

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.
 - Access form will be prepopulated with PAN Name and PAN for which Access is requested.
 - Current Access Level - applicable for that PAN
 - 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.

The screenshot shows a web application interface for requesting access to a PAN profile. The top navigation bar includes 'Welcome', a search bar, and a 'Logout' link. Below the navigation bar, there are tabs for 'Modules', 'Profiles', 'Taxpayer', and 'Master Profile (TMP)'. The left sidebar contains icons for 'Modules', 'Profiles', 'i-Search', 'Verification', 'Data Management', 'Business Intelligence', and 'Operations'. The main content area displays a message: 'It seems you do not have the access rights to view profile for this PAN. You can make a request for granting viewing rights using below form.' Below this message is a form titled 'Access Request ID: To be generated'. The form has two radio buttons: 'Access for Specified Reason' (selected) and 'Access for other Reason'. The form fields include: 'Access For' (SHANKAR KUMAR KUMAR (PAN: 010010000000)), 'Current Access Level' (Level 0 - No Profile Access Right), 'Required Access level' (Level 2 - Restricted Information View), 'Access Period' (30 day(s)), 'Case ID' (disabled), 'Reason for Access' (disabled), 'Remarks' (text area), and 'Approving Authority' (disabled). The form has 'Submit' and 'Cancel' buttons. The status is 'New'. The date and time are '04-10-2023 12:55 PM, IP Address: '.

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.
 - Recovery of Demand
 - 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.

The screenshot shows the 'Master Profile (TMP)' view for a specific PAN. The top navigation bar includes 'Workspace', 'Users', 'Knowledge Hub', 'Learning Hub', 'Resources', and 'i-Help'. Below the navigation bar, there are tabs for 'Modules', 'Profiles', 'Taxpayer', 'Master Profile (TMP)', and 'Key Insights'. The left sidebar contains icons for 'Modules', 'Profiles', 'i-Search', 'Verification', 'Data Management', 'Business Intelligence', and 'Operations'. The main content area displays the 'Profile view for [PAN: 010010000000]' with a 'Profile Summary' icon. The 'Master Profile (TMP)' tab is selected, showing a list of key insights. The list includes: 1. Taxpayer Type: Individual (Proprietor), 2. Partner in 4 firms, 3. Director in 3 companies, 4. Key shareholder in 2 companies, 5. Return for AY 2018-19 filed in ITR 3 on showing Income of Rs. 23,00,000, 6. Revised return for AY 2018-19 filed in ITR 3 on showing Income of Rs. 22,00,000, 7. GTI of Rs. 34,00,000 and exemption/deduction of Rs. 12,00,000 for AY 2018-19, and 8. Nature of Business (ITR): Trading. The 'Key Insights' tab is selected, showing a list of key insights. The list includes: 1. Taxpayer Type: Individual (Proprietor), 2. Partner in 4 firms, 3. Director in 3 companies, 4. Key shareholder in 2 companies, 5. Return for AY 2018-19 filed in ITR 3 on showing Income of Rs. 23,00,000, 6. Revised return for AY 2018-19 filed in ITR 3 on showing Income of Rs. 22,00,000, 7. GTI of Rs. 34,00,000 and exemption/deduction of Rs. 12,00,000 for AY 2018-19, and 8. Nature of Business (ITR): Trading.

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.

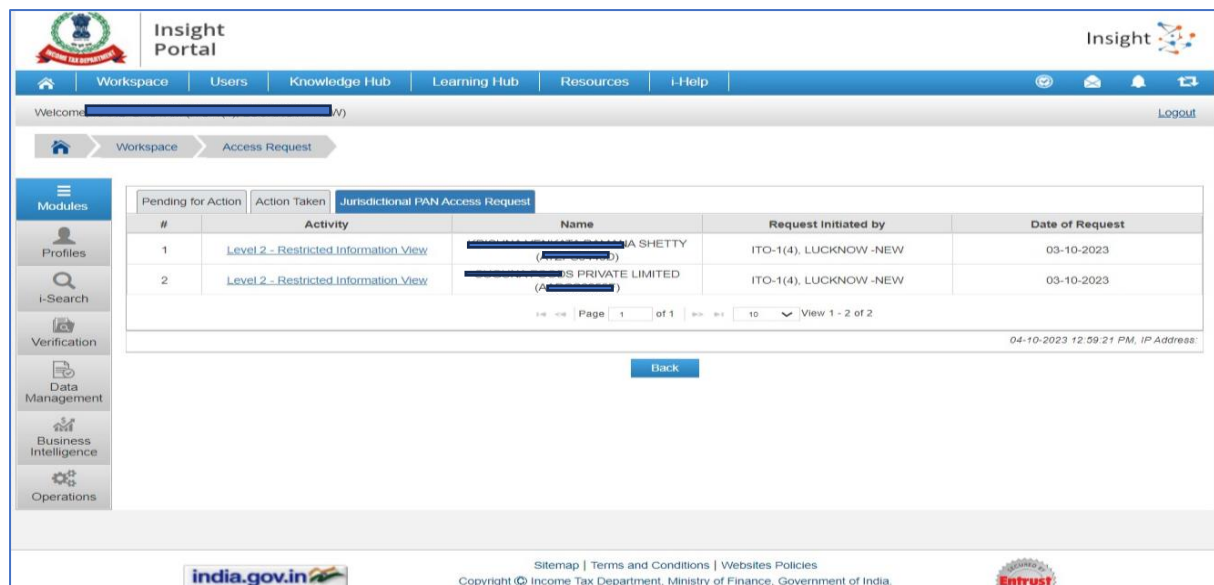


Figure 4 Request visible in Workspace

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.

It seems you do not have the access rights to view profile for this PAN. You can make a request for granting viewing rights using below form.

[No I do not want to request for access](#)

Access Request ID: To be generated Status - New

Access For	[REDACTED] (CL)	Current Access Level	Level 0 – No Profile Access Right
Required Access level	<input checked="" type="radio"/> Level 1 - Basic Information View <input type="radio"/> Level 2 - Restricted Information View <input type="radio"/> Level 3 - Specific Confidential Information view <input type="radio"/> Level 4 -All Confidential Information View		
Access Period *	1 day(s) (maximum up to 90 day(s))		
Case ID *	<input type="text"/> Select	Reason for Access*	<input type="text"/> Select
Remarks *	<input type="text"/>		
Approving Authority	ADDL CIT(HQ)(ADMN)&TPS CHENNAI		

02-03-2023 12:15 PM , IP Address: [REDACTED]

[Submit for Approval](#) [Cancel](#)

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.

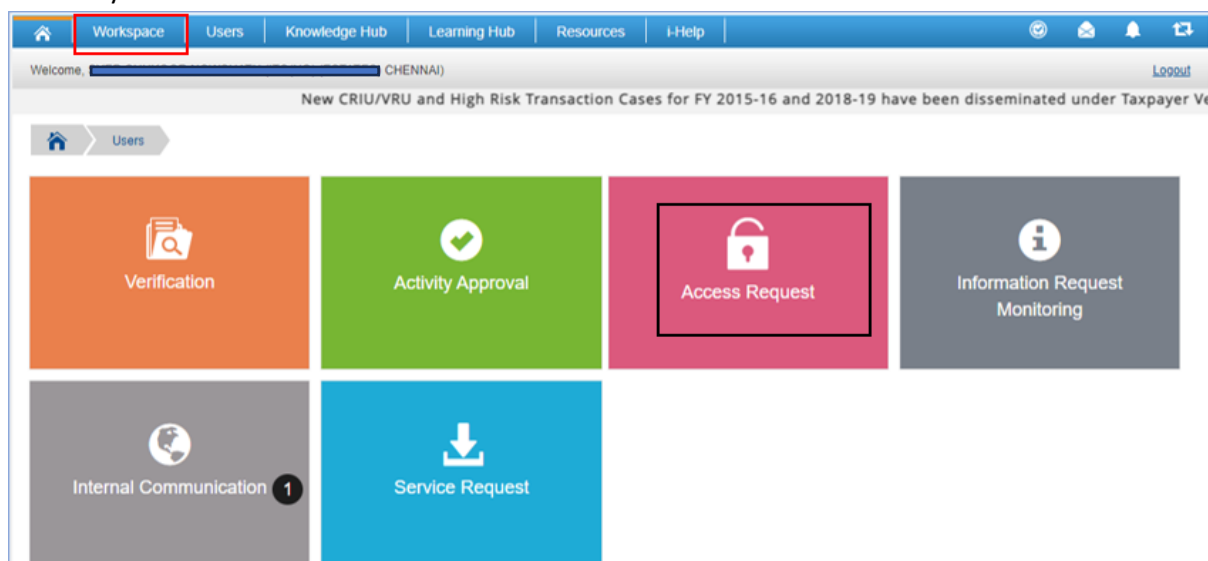


Figure 6 Access Request tile available in Workspace

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.

Workspace > Access Request									
		Pending for Action Action Taken							
		Filters Requested Access Level: <input type="text"/> Related Case Type: <input type="text"/> Last Action taken by me: <input type="text"/> Current Status: <input type="text"/> Pending Since: <input type="text"/> mm/dd/yyyy <input type="button" value="Go"/>							
#	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
31	Level 2 - Restricted Information View	R [REDACTED]	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-2022
32	Level 2 - Restricted Information View	R [REDACTED]	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-2022
33	Level 2 - Restricted Information View	R [REDACTED]	Computer Aided Scrutiny Selection (CASS)	151801530703	ITO(HQ) (ESTATES) CHENNAI	Submitted for Approval	Submitted for Approval	DCIT(HQ) (ADMN), CHENNAI	29-12-2022

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.

