Directorate of Income Tax (Systems)

Compliance Portal
Frequently Asked Questions (FAQs)

Version 5.0 (August 2020)

Insight

Document Version Control

Version	Month	Remarks
1.0	September 2017	First version
2.0	March 2018	Updated FAQs
3.0	March 2020	FAQs updated for e-Campaign
4.0	July 2020	• e-Sahyog and OCM section has been removed • FAQs updated for High Value Transactions under e-Campaign
5.0	August 2020	Version updated to include excel download facility made available in e-Campaign

Contents

Insight

1. Overview

1.1 Project Insight

1. **What is Project Insight?**
Income tax Department has initiated Project Insight to focus on three goals namely (i) to promote voluntary compliance and deter noncompliance; (ii) to impart confidence that all eligible persons pay appropriate tax; and (iii) to promote fair and judicious tax administration. Under this project, an integrated data warehousing and business intelligence platform is being rolled out in a phased manner. The project also operationalizes two new centres namely Income Tax Transaction Analysis Centre (INTRAC) and Compliance Management Centralized Processing Centre (CMCPC).
2. **What is Income Tax Transaction Analysis Centre (INTRAC)?**
The Income Tax Transaction Analysis Centre (INTRAC) is the new centre operationalized under Project Insight. INTRAC leverages data analytics in tax administration and performs tasks related to data integration, data processing, data quality monitoring, data warehousing, master data management, data analytics, web/text mining, alert generation, compliance management, enterprise reporting and research support.
3. **What is Compliance Management Centralized Processing Centre (CMCPC)?**
The Compliance Management Centralized Processing Centre (CMCPC) is the third CPC of Income tax Department operationalized under Project Insight. The Compliance Management Centralized Processing Centre (CMCPC) uses campaign management approach (consisting of emails, SMS, reminders, outbound calls, letters) to support voluntary compliance and resolution of compliance issues. A dedicated compliance portal is used to capture response on compliance issues in a structured manner for effective compliance monitoring and evaluation.

1.2 Compliance Portal

1. **What is Compliance Portal?**
Compliance portal is the dedicated portal operationalized under Project Insight to enable e-verification (i.e. capture of response on specific compliance related issues in a structured manner) for effective compliance monitoring and evaluation. The Compliance portal also enables a seamless, secured two way structured communication to enhance the transparency and functional efficiency of the department. To access the Compliance Portal, log into the e-filing portal (https://incometaxindiaefiling.gov.in) and click the Compliance Portal link available under My Account or click the 'Compliance' tab. You can also access the Home page of the Compliance Portal at the URL https://compliance.insight.gov.in.
2. **What is Compliance Management?**
Compliance management is the process which ensures that taxpayer complies with the obligations under the tax laws. Once a compliance issue is identified, the issue and related information is communicated to the taxpayer through various communication channels such as email, SMS, letter,

call, notice, etc. The taxpayer is expected to submit the response in the desired format on compliance portal.

1.3 e-verification

1. What is e-verification?

e-verification is process of verification of an issue and related information using electronic communication. It involves capture of response on specific compliance related issues in a structured manner

2. How are cases for e-verification identified?

Cases for e-verification are identified on the basis of scenarios and rules approved by the Central Board of Direct Taxes.

3. Which portal will be used for e-verification?

Earlier e-verification was being done on e-filing portal. The e-verification will gradually shift to Compliance portal which is a dedicated portal operationalized under Project Insight to enable e-verification (i.e. capture of response on specific compliance related issues in a structured manner) for effective compliance monitoring and evaluation. The Compliance portal also enables a seamless, secured two way structured communication to enhance the transparency and functional efficiency of the department.

4. How will the taxpayer come to know about pending e-verification?

If any case is pushed to compliance portal for e-verification, Email and SMS will be sent to the taxpayer informing that information has been received in the case and response may be submitted on the Compliance Portal.

5. How do I ensure that I receive all communication about e-verification?

Please verify and update the email address and mobile number on the e-filing portal (at https://incometaxindiaefiling.gov.in) to receive electronic communication. Taxpayer should also include the emails and SMS from the Income tax Department in the 'safe list' or 'white list' to prevent the communications from the Department from being blocked or rejected or sent to Spam folder.

6. What action is required from me if I receive a communication?

Once a communication is received, taxpayer should log into the Compliance Portal and check the details of issues generated and submit adequate response for the same.

7. What happens after submission of my online response?

The responses submitted online by the taxpayers will be verified by the Income tax department. If the response is found to be satisfactory, the case will be closed. Otherwise, further queries may be raised or suitable proceedings may be initiated.

1.4   e-Campaign

1.   What is e-Campaign?
Under e-Campaign tab of Compliance Portal, information received from various sources related to the taxpayer is displayed for seeking feedback. The taxpayer is required to submit response on each information item to complete the process of submission of response. Following e- Campaign functionalities are available: • e- Campaign - Significant Transaction • e- Campaign - Non filing of Return • e- Campaign – High Value Transactions
2.   What is 'Significant Transactions' under e-Campaign?
Transactions reported to the Income Tax department during a financial year that are considered not in line with the profile of the taxpayer based on pre-defined rules are displayed to the taxpayer for feedback.
3.   What is 'Non-Filing of Return' under e-Campaign?
Transactions of the taxpayer who have not filed return of income for a specific assessment year and have potential tax liability or who are under obligation to file return of income, are displayed for feedback
4.   What is 'High Value Transactions' under e-Campaign?
Certain transactions of the taxpayer reported in their ITR which have been found to be inconsistent with the information received from the third party for a specified Assessment Year are displayed to the taxpayer for feedback.

2. Login

2.1 Compliance Portal Login

1.   How to login to Compliance Portal?
Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/ Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab. Step 3: The user will be redirected to the compliance Portal.
2.   Is it necessary to login to Compliance Portal? What happens if I don't log in?
If you do not log in, you will not be able to respond to the issues.

2.2 e-filing portal login

1. How can I login to e-filing Portal?
You can login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/   If you are a new user, please click on "Register Yourself" on the e-filing portal and select your user type. Once user type is selected, all the mandatory fields are to be filled up and after a successful registration, you can login to the e-filing portal.   If you are a registered user, you will be able to login through your user id and password created at the time of registration.

3. Non-filing of Return

3.1 Identification of e-verification case

1. What is a Non-filing of return case?
A taxpayer who is having total income above the prescribed limit or fulfils any other condition mentioned in section 139 of the Income Tax Act 1961, is required to file return of income. Non-filers with potential tax liabilities are identified by analysing information received under Annual Information Return (AIR), Statement of Financial Transactions (SFT), Centralised Information Branch (CIB), TDS/TCS Statement, Securities Transaction Tax (STT) etc. and taxpayer profile.
2. How a Non-filing of return case is identified?
Non-filers with potential tax liabilities are identified by analysing information received under Annual Information Return (AIR), Statement of Financial Transactions (SFT), Centralised Information Branch (CIB), TDS/TCS Statement, Securities Transaction Tax (STT) etc. and taxpayer profile. Cases for e-verification are identified on the basis of scenarios and rules approved by the Central Board of Direct Taxes.

3.2 Case View

1. What should I look for in a case?
A case is composed of one or more issues. You can view the issues by navigating to the e-verification tab in the Compliance Portal. You can select an issue and provide the necessary response to the queries raised against the issue. Response to an issue may require you to enter amount involved or text or select option from a drop down list or upload relevant document.
2. How can I view my case and related information?
Case related information can be viewed in e-verification tab.
3. Where can I get the understanding of terminologies used?
Please refer to the user guides available in resources section of the compliance portal.

3.3 Compliance Issue

1. What is a compliance issue?
Compliance issue is flagged if the taxpayer fails to fulfil their obligations under the Income tax Act 1961. Example of compliance issue are failure to file return in time, failure to provide accurate particulars of income, failure to pay taxes on time etc.
2. How can I get more information about the issue?

The information about the issues is available in the user guide in **Resources** section of the Compliance Portal. Please refer the user guide for more details.

3. If the information displayed in the issue does not belong to me, what should I do?

In that case, you can select the response "Not aware of this information" and click on the **Submit** button. Your feedback will be sent to the information source for confirmation.

4. If the information displayed does not belong to me, but it belongs to a related person, what should I do?

In such a case, you can select the response "Aware of this information" and click on the **Submit** button. You can provide the details of the related person under the section "Relates to other PAN/year"

5. If the information amount displayed is not correct, how do I mention the correct amount?

If the information value displayed is not correct, please mention the correct value while submitting the response. Such cases may be sent to the information source for confirmation.

3.4 Information Types

1. What is related information?

The related information section on 'Verification Issue Detail' screen displays the latest information received by ITD, against which response is required to be submitted

2. What is earlier information?

The earlier information section on 'Verification Issue Detail' screen displays the information received earlier and on which response is no more required.

3. Is it required to give response on related information if response has already been given on earlier information

The information received by the ITD for PAN holders from various sources is utilized in identification of cases. Such information at times may get revised or updated and response might be sought from the taxpayer.

If the previous response is not in consonance with the latest information, the taxpayers' would be required to submit the response against the latest information.

4. What does 'Updated' link signifies?

'Updated' link against an information on 'Verification Issue Detail' screen gives a comparative view of all versions of a particular information (if update is received by ITD). Information is listed in descending order of receipt date i.e. latest information first.

3.5 Online Response

1. How to submit an online response?
Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/   Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.   Step 3: Click on e-verification tab   Step 4: Click on View button against the case   Step 5: Select and submit response.
2. Can I submit a response in a letter?
Response is required to be submitted online only.
3. Which internet browser should I use to view and submit response on compliance portal?
The compliance portal and other utilities can be best viewed on Internet Explorer 11 and latest version of browsers like Mozilla and Chrome.
4. What if I am legally not liable to file return of income?
Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/   Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.   Step 3: Click on e-verification tab   Step 4: Click on View button against the case.   Step 5: Select response as "ITR has not been filed."   Step 6: Select reason as "Not liable to file return of income."   Step 7: Submit the response.   Step 8: Once you submit the response, issues will be visible.   Step 9: Navigate to each issue by clicking on view.   Step 10: Under each issue related information(s) will be visible. Submit response for each related information.   Note: For guidance on filing response for each information, please refer user guide available in resources section in compliance portal.
5. If I have already filed return, what should I do?

Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/

Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.

Step 3: Click on e-verification tab

Step 4: Click on View button against the case

Step 5: Select response as "ITR has been filed"

Step 6: Select Mode i.e. e-filed or Paper filed

Step 7: Enter Date of submission of return and acknowledgement number received after submission of return of income. In case of paper filed return, Circle/Ward and City is also to be entered.

Step 8: Submit the response

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6. How can I be certain that my response has been successfully submitted?

As soon as you file the response, a message will be shown "Response submitted successfully".

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7. Once submitted, if I want to modify or change my response or explanation provided, how can I do so?

You can edit/revise the submitted response anytime.

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8. Is response provided by me final or may I be asked to file additional information to support the response?

You may need to provide additional information if your case is selected for further verification.

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9. If any additional information is required, how shall I be intimated?

Further queries may be raised by the Income tax Department and you will be intimated through SMS, email, call, etc. Provision for filing response to the additional information will be available on the Compliance portal.

3.6 Response Template Categories

1. What is a response template?

Each compliance issue is mapped to a response template in which the response is recorded in a structured manner. The template contains multiple heads under which the response will be captured.

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2. What are different categories of response templates?

- Taxability of Transaction/Receipt
- Taxability of Transaction Relating to Sale of Immovable Property
- Source of Funds
- Source of Funds and Taxability of Income

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3. What is 'Taxability of Transaction/Receipt'?

In this response category, the taxpayer is required to give information about taxability of amount received by him. The taxpayer can enter relevant information in the following fields to arrive at Income/Gain/Loss with reference to the receipts.

  a) Receipts related to above information

  b) Value relating to other year/PAN

  c) Value covered in other information

  d) Exemption/Deduction/Expenditure

  e) Income/Gain/Loss

Please refer user guides for detailed guidance on filing response for specific issues.

4. What is 'Taxability of Transaction Relating to Sale of Immovable Property'?

In this response category, the taxpayer is required to give information about the taxability of amount relating to sale of immovable property. The taxpayer can enter relevant information in the following fields to arrive at Income/Gain/Loss with reference to such transaction.

  a) Receipts related to above information

  b) Stamp value at which property is registered

  c) Value taken for computation of capital gains

  d) Value relating to other year/PAN

  e) Value covered in other information

  f) Exemption/Deduction/Expenditure

  g) Income/Gain/Loss

Please refer user guides for detailed guidance on filing response for specific issues.

5. What is 'Source of Funds'?

In this response category, the taxpayer is required to indicate source of deposit/investment/expenditure. If amount is from more than one category, the source of amount may be assigned under various categories in the sequence mentioned below, (Adopting other sequence may result in case being selected for verification based on risk criteria)

  a) Out of earlier income or savings

  b) Out of receipts exempt from tax

  c) Received from identifiable persons (with PAN)

  d) Received from identifiable persons (without PAN)

  e) Received from un-identifiable persons

  f) Others

Please refer user guides for detailed guidance on filing response for specific issues.

6. What is 'Source of Funds and Taxability of Income'?

In this response category, the taxpayer is required to indicate source of deposit/investment/expenditure and indicate if any income on such transaction/investment has been earned. If amount relates to more than one category , the source of amount may be assigned under various categories in the sequence mentioned below, (Adopting other sequence may result in case being selected for verification based on risk criteria)

    a) Out of earlier income or savings

    b) Out of receipts exempt from tax

    c) Received from identifiable persons (with PAN)

    d) Received from identifiable persons (without PAN)

    e) Received from un-identifiable persons

    f) Others

    g) Income on above transaction/Investment during the year

Please refer user guides for detailed guidance on filing response for specific issues.

3.7 Additional Query Request

1. What is an additional query request?

Upon examining the online response submitted by taxpayer, ITD can raise an additional query request to seek further information/clarification from taxpayer.

2. How will I be notified if an additional query request is raised?

In case an additional query request is initiated by ITD, the CMCPC will contact taxpayers via email, SMS, calls and letters.

3. How to view additional query?

Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/

Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.

Step 3: Click on e-verification tab

Step 4: Click on View button against the case

Step 5: Click on 'Click here for Details' button against 'Total Additional Queries Requested by ITD'

Step 6: Click on 'Identifier' link of the request.

Step 7: User will be navigated to the relevant detail page.

4. How to submit response for an additional query request?

Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/

Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.

Step 3: Click on e-verification tab

Step 4: Click on View button against the case

Step 5: Click on 'Click here for Details' button against 'Total Additional Queries Requested by ITD'

Step 6: Click on 'Identifier' link of the request.

Step 7: User will be navigated to the relevant detail page.

Step 8: Click on Submit button against the 'Additional Query Request' to submit response.

3.8 Response History

1.   What is a response history?

Response history is the history of all the responses received from the taxpayer.

2.   How can I view response history in my Non-filing of return case for each related information?

Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/

Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.

Step 3: Click on e-verification tab

Step 4: Click on view button against the case

Step 5: Click on view button against the issue

Step 6: Click on view button against the related information

3.   How can I view response history in my Non-filing of return case for each additional information?

Step 1: Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in/

Step 2: Click on the 'Compliance Portal' link available in "My Account" or "Compliance" tab.

Step 3: Click on e-verification tab

Step 4: Click on view button against the case

Step 5: Click on view button against each issue

Step 6: If additional information request is at issue level then follow step 7 and if additional information request is for a related information then follow step 8

Step 7: Select additional information request and click on "View"

Step 8: Click on view button against the related information and Select additional information request and click on "View".

4.   How can I download a copy of previous responses?

Once you check for response history, the PDF of previous responses is available for download. You can download the response as a PDF file.

3.9 Case Lifecycle

1. What happens after submission of my online response?
The online response submitted by you will be verified by the ITD and if found satisfactory, the case will be closed.

2. What happens if my response is not accepted by Income Tax Department?
The responses submitted online by you will be verified by the ITD and if not found satisfactory, the case may be taken up for detailed verification.

3. I have received a notice under section 142(1) from Income tax Department, what should I do?
You can do one of the following: 1. If the return has already been filed, you should provide the acknowledgement number and the date of filing the return. 2. If the return has not been filed, a return should be filed within the time allowed in the notice. 3. If you are not liable to file a return, a response should be sent to the Assessing Officer from whom the notice has been received, giving reasons why you are not required to file a return of income.

4. What happens if I file my return of income for the relevant assessment year, after the identification of case?
If you have filed Income Tax Return and is found valid in ITD database, then the case will be marked as closed in Non-filing of Return (NMS) with status as 'Verified'.

5. How will I get to know whether my case has been closed or not after filing of return?
If you have filed Income Tax Return and is found valid in ITD database, then the case will be marked as closed in Non-filing of Return (NMS) with status as 'Verified' and user will be displayed the following message on Compliance Portal: 'This case has been marked as closed in Non-filing of Return (NMS) upon receipt of valid Income Tax Return'

4. e-Campaign

4.1 Accessing e-Campaign

1. How to access e-Campaign-Significant Transactions and submit response?
Taxpayer can access the e-Campaign - Significant Transactions module by following below mentioned steps. **Step 1:** Go to the Compliance Portal (https://compliance.insight.gov.in.) On the left sidebar, click the '**Login'** button, which redirects the taxpayer to the e-filing portal. You can also use the URL https://incometaxindiaefilling.gov.in to access e-filing portal. **Step 2:** Log into e-filing portal and then click on any of the '**Compliance Portal'** link available under two tabs – '**My Account'** and '**Compliance**'. The taxpayer gets redirected to the Compliance Portal. **Step 3:** After successful login, click on **e-Campaign** option displayed at Compliance Portal landing page. **Step 4:** Click on 'Financial Year' under 'e-Campaign - Significant Transactions'. **Step 5:** Information summary will be displayed after clicking on Advisory Message pop up. **Step 6:** Click on **">"** button will display information detail. **Step 7:** Click on **">"** button on Information detail will display the feedback options. **Step 8:** Click on feedback option and submit response as applicable. For more details, kindly refer e-Campaign User Guide available in "Resource" section at Compliance Portal.
2. How to access e-Campaign-Non-Filing of Return and submit response?
Taxpayer can access the e-Campaign – Non-filing of return module by following below mentioned steps. **Step 1:** Go to the Compliance Portal (https://compliance.insight.gov.in.) On the left sidebar, click the '**Login'** button, which redirects the taxpayer to the e-filing portal. You can also use the URL https://incometaxindiaefilling.gov.in to access e-filing portal. **Step 2:** Log into e-filing portal and then click on any of the '**Compliance Portal'** link available under two tabs – '**My Account'** and '**Compliance**'. The taxpayer gets redirected to the Compliance Portal. **Step 3:** After successful login, click on **e-Campaign** option displayed at Compliance Portal landing page. **Step 4:** Click on '**'Financial Year"** under Non-Filing of Return. **Step 5:** Taxpayer will be navigated to 2 tabs i.e. e-Campaign Response on **Filing of Income Tax Return** and e-Campaign **Information Confirmation.** **Step 6:** Taxpayer needs to Click on **Response on Filing of Return** to submit the response related to ITR filed. **Step 7:** After submitting response on Filing of Income Tax Return, click on "**e-Campaign Information Confirmation"** to submit confirmatory feedback. **Step 8:** Information summary will be displayed after clicking on Advisory Message pop up. **Step 9:** Click on **">"** button will display information detail. **Step 10:** Click on **">"** button on Information detail will display the feedback options.

For more details, kindly refer e-Campaign User Guide available in "Resource" section at Compliance Portal.

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3. How to access e-Campaign-High Value Transactions and submit response?

Taxpayer can access the e-Campaign – High Value Transactions module by following below mentioned steps.

Step 1: Go to the Compliance Portal (https://compliance.insight.gov.in.) On the left sidebar, click the '**Login**' button, which redirects the taxpayer to the e-filing portal. You can also use the URL https://incometaxindiaefilling.gov.in to access e-filing portal.

Step 2: Log into e-filing portal and then click on any of the '**Compliance Portal'** link available under two tabs – '**My Account'** and '**Compliance**'. The taxpayer gets redirected to the Compliance Portal.

Step 3: After successful login, click on **e-Campaign** option displayed at Compliance Portal landing page.

Step 4: Click on 'Financial Year' under 'e-Campaign - High Transactions'.

Step 5: Information summary will be displayed after clicking on Advisory Message pop up.

Step 6: Click on **">"** button will display information detail.

Step 7: Click on **">"** button on Information detail will display the feedback options.

Step 8: Click on feedback option and submit response as applicable.

For more details, kindly refer e-Campaign User Guide available in "Resource" section at Compliance Portal.

4.2 Feedback Submission

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1. What are the Feedback options available for submission of Response against each Information detail?

The feedback options will be displayed on each Information detail. User will be able to select only one of the available options for submitting feedback. Feedback options are as follows:

A. Information is correct

B. Information is not fully correct

C. Information relates to other Person/Year

D. Information is duplicate/included in other displayed information

E. Information denied

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2. How many times, Taxpayer can Revise Response using "Change Response" hyperlink?

Taxpayer can change his response any number of times. For more details on how to change the response submitted against each Information detail, you are requested to refer the e-Campaign user-guide available in "Resource" section at Compliance Portal.

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3. How to submit response in Bulk?

To submit the information in bulk Taxpayer needs to select multiple transactions at a time and also, he can select only two feedback options to submit the response in bulk: -

- Information is correct and

- Information is denied

4.	How to download information in excel?

- Excel download facility is available on Information Detail screen. Users can download excel file by clicking on Download Button present above the displayed information on right hand side of the screen.
- Under this option, all the information pertaining to one information category can be downloaded in excel.
- Downloaded file will display information with below details:
  - TSN
  - Information Source
  - Information Description
  - Additional Information Field
  - Information Value
- Please note that downloaded excel will not contain submitted feedback. Download of submitted feedback is available in pdf format. (Please refer Q 2 of Sr.no. 4.3 of this document)

4.3 View Submitted Response

1.	How can taxpayer view the submitted response on each Information?

Step 1: Visit Compliance Portal at https://compliance.insight.gov.in or Login to the e-filing portal by using the URL https://incometaxindiaefiling.gov.in and Click on 'Compliance Portal' link available in "My Account" or "Compliance" tab.
Step 2: After successful login, click on 'e-Campaign' Tab available at home page of Compliance Portal to view Information Summary screen.
Step 3: Click on "Financial Year" under Significant Transactions/Non- Filing of Return/High Value Transactions option (Whichever is applicable).
Step 4: Click on 'Financial Year' available under 'e-Campaign –Information Confirmation'. (Applicable for non-filing of return).
Step 5: Click on ">" button to view information detail.
Step 6: Click on "View Response" button under Information detail.

A Pop-up window will appear displaying the details of response submitted by the taxpayer.

For more details, kindly refer e-Campaign User Guide available in "Resource" section at Compliance Portal.

2.	What is Response summary?

From this section taxpayer can download an acknowledgment in pdf format for the response submitted.

- Response Summary pdf will display the submitted response with feedback date.

- Feedback shall be displayed response option wise. (Please refer Q1 Sr. No. 4.2 for available response options)

- In case taxpayer has not submitted the response, information shall be displayed under the head 'Response yet to be submitted'.

• In case taxpayer had submitted response for the same information twice, Response Summary shall contain response details with latest feedback date.

4.4 Interpretation of different colours/icons

1. **What is the interpretation of different colours/icons displayed against each Information detail?**

Information Summary Level

Icon	Description
✅ (green)	User has confirmed all information records (Option A is selected)
ⓘ (red)	User has provided response on all information records and has requested modification of information (Option B, C, D, E selected)
⬭ (grey)	User has submitted response on partial information records
⬤ (blue)	User has seen the information, but response not submitted
⬭ (dashed)	User has not seen the information

Information Level

Icon	Description
✅ (green)	User has confirmed the information (Option A is selected)
ⓘ (red)	User has not confirmed the information and has requested modification of information (Option B, C, D, E selected)
⬤ (blue)	User has seen the information, but response not submitted
⬭ (dashed)	User has not submitted response on information

5. Resources

5.1 Quick Reference Guide

1. **What is a quick reference guide? How can I access/download it?**
A quick reference guide is a document that provides a concise and targeted information for performing tasks related to filling the response against the cases generated on compliance portal. It can be accessed from **"Resources"** section on Compliance Portal.
2. **When should I refer to the quick reference guide?**

Quick reference guide can be referred, when you need brief assistance on how to perform specific tasks on the compliance portal

5.2 User Guide

1. What is a user guide? How can I access/download it?
A user guide is intended to give assistance to you in using the Compliance portal. It can be accessed from **"Resources"** section on Compliance Portal.
2. When should I refer to the user guide?
User guide can be referred for detailed information on how to accomplish a task on the compliance portal.

5.3 FAQs

1. How can I access/download FAQs?
Step 1: Log in to the compliance portal Step 2: Navigate to the **"Resources"** tab and click on "FAQs" Step 3: FAQs are also available in **Help** section on Compliance Portal.

5.4 Training Toolkit

1. What is a training toolkit? How it is useful?
Training Toolkit contains multiple documents intended to give assistance to taxpayer/tax professionals in using the Compliance portal.
2. Where can I access/download the training toolkit?
Step 1: Log in to the compliance portal Step 2: Navigate to the "Resources" tab and click on "Training Toolkit"

6. Others

6.1 My query/problem is not listed here

1. What should I do if my query/problem is not listed here?

Step 1: Click on the "Help" icon on the compliance portal

Step 2: Click on "Contact us" button

Step 3: Select the issue category and sub-category

Step 4: Select the case Id if your query is related to case

Step 5: Click on "Email Us" and describe the problem you are facing and click on "Submit"

Note: Please update your contact details on e-filing portal to receive an update on the open queries.