



## ITBA-Assessment Instruction No -8

आयकर निदेशालय (पद्धति)  
**DIRECTORATE OF INCOME TAX (SYSTEM)**

ए आर ए सेंटर, भू-तल, ई-2 झंडेवालान एक्स  
**ARA Center, Ground Floor, E-2, Jhandewalan Extension,**  
नई दिल्ली – 110055, **New Delhi – 110055**

F.No. System/ITBA/Instruction/Assessment/177/16-17/

Dt: 3<sup>rd</sup> Oct 2017

To,

**All Principal Chief Commissioners of Income-tax/ CCsIT (By Name)**  
**All Principal Director General of Income Tax / DGsIT (By Name)**  
**All Principal Commissioner of Income-tax/CsIT/CsIT(Admin & TPS) (By Name)**  
**All Principal Directors of Income Tax/DsIT(By Name)**

**Subject: Workload distribution (case assignment) - Assessment Module in Income Tax Business Application (ITBA)**

This is in reference to the subject mentioned above. All officers may refer to previous ITBA Assessment Instructions specially ITBA Instruction no 5 on Migration of scrutiny cases from AST to ITBA and transitional matters and ITBA Assessment Instruction No. 6 on Passing of Assessment order in ITBA and ITBA Instruction No 7 on Other functionalities in Assessment.

2. Assessment module of the ITBA can be accessed by entering the following URL in the browser: <https://itba.incometax.gov.in>

The path for the module is: **ITBA Portal → Login → Modules → Assessment**

3. The following process forming a part of the Assessment module are now available to the PCCIT/CCIT/PCIT/CIT in ITBA:

**(A) Assignment/re-assignment of cases by CIT/PCIT/CCIT/PCCIT for workload distribution or for other reasons to JCIT or other AOs:**

- i. To assign the cases to Range u/s 120(4) or to any other AO u/s 120(5) for work distribution or otherwise, PCIT/CIT will go to **Assessment → Menu → Assignment of Cases**.
- ii. Select the **Assignment section** as 120(4) or 120(5). Enter search parameters and click **Search**. All the pending assessment proceedings are displayed based on the parameters selected.
- iii. Select the cases and enter reason.
  - a. **Assignment Section selected as 120(4):**
    - **In case order is already passed and is being uploaded using manual to system functionality by either HQ of CIT/PCIT/ CCIT/DGIT/ PCCIT or AO/Range/CIT/PCIT/CCIT/PCCIT: Enter the details of order u/s 120(4) and click**

**Submit.** Screen is opened to upload the manual order u/s 120(4) passed by CIT/PCIT/CCIT/DGIT/PCCIT by clicking **Generate**. Order is uploaded successfully.

- **In case Order is yet to be passed, then the same has to be done by CIT/PCIT/CCIT/DGIT/PCCIT:** Click **Generate Order**. Screen is opened to preview the draft format of order u/s 120(4). Click **Generate**. Order is generated successfully.
- Pendency will be removed from relevant AO's worklist and added in the relevant Range officer's worklist.

**b. Assignment Section selected as 120(5):**

- Select the Destination AO.
- **In case order is already passed and is being uploaded using manual to system functionality by either HQ of CIT/PCIT/CCIT/DGIT/PCCIT or Range/CIT/PCIT/CCIT/DGIT/PCCIT:** Enter the details of order u/s 120(5) and click **Submit**. Screen is opened to upload the manual order u/s 120(5) passed by CIT/PCIT/CCIT/DGIT/PCCIT through clicking **Generate**. Order is uploaded successfully.
- **In case Order is yet to be passed, then the same has to be done by Range/CIT/PCIT/CCIT/DGIT:** Click **Generate Order**. Screen is opened to preview the draft format of order u/s 120(5). Click **Generate**. Order is generated successfully.
- Pendency will be removed from source AO's worklist and added in the relevant destination AO's worklist.

**4. Pre-requisites**

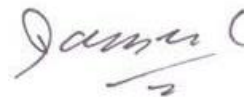
- i. Officers will need their individual name based department email IDs and RSA tokens. The username and passwords will be communicated on their respective email ID. The log in to the system will be through the username and password along with the RSA token over the Taxnet nodes. Officers are advised to contact their respective RCC Admin for name based department email ID if not already available.
- ii. Officers on Windows system are advised to download the Chrome (version 43 or higher) or Firefox (version 36 or higher) browser from **ITBA Portal → Download Pre-Requisites** to access the new ITBA application.

**5.** Training material including User manual, help content and frequently asked questions (FAQs) are available on the Assessment module Home Page and also on **ITBA Portal → Online Training on ITBA**. AOs can click on the Online training functionality to access the following: User Manual, Step by Step, Frequently Asked Questions, and a Power Point Presentation to understand how to use the new functionalities in the Assessment module.

**7. It is expected that all Officers may henceforth use the aforesaid process, wherever required, while distributing workload (case assignment) using the Assessment module of ITBA.**

7. Officers are advised to contact helpdesk in case of any issues in respect of ITBA.
- a. URL of helpdesk - <http://itbahelpdesk.incometax.net>
  - b. Help desk number – **0120-2811200**
  - c. Email ID – [itba.helpdesk@incometax.gov.in](mailto:itba.helpdesk@incometax.gov.in)
  - d. Help desk Timings – 8.30 A.M. – 7.30 P.M. (Monday to Friday).

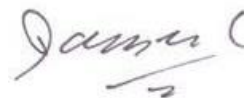
Yours sincerely,



(Ramesh Krishnamurthi)  
Addl.DG(S)-3, New Delhi

Copy to:

- i. The P.P.S to Chairman, Member (L), Member (Inv.), Member (IT&C), Member (R), Member (A&J) & Member (P&V), CBDT for information.
- ii. The P.S. to Pr.DGIT(S) for information.
- iii. Database Cell with the request to upload the Instruction on [www.irsofficersonline.gov.in](http://www.irsofficersonline.gov.in).
- iv. ITBA Publisher with the request to upload the Instruction on the ITBA Portal.



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