आयकर निदेशालय (पद्धति)
DIRECTORATE OF INCOME TAX (SYSTEM)
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F.No. System/ITBA/Instruction/Common/180/2017-18 **Dated: 03.07.2017**

To

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

Subject: Launch of Status Monitor for Tracking Workflow Status in Income Tax Business Application (ITBA) – Reg.

Sir/Madam,

This is in reference to the subject mentioned above.

The very important functionality of Status Monitor which can be used by any Supervisory Officer to monitor the exact status and details of any proceeding of any subordinate officer is now available on the ITBA Portal. User can access status monitor for all ITBA modules through the respective modules' worklist.

2. Status monitors enables the officers and their Senior Officers to track the workflow statuses in ITBA. The same can be used to monitor the progress of pendency and give directions to subordinates.

3. Status Monitor provides the following functions to the users in ITBA.
   a) Live Monitoring – Senior Officers can monitor workitem(s) assigned to other users within their charge. For example, PCIT can review the work of AO, Range under them as well as the work pending with their own HQ/Staff.
   b) Give Directions – Senior Officers can give directions for a particular proceeding pending with subordinate through the Case History/ Notings available in the workitem.
   c) View pending and completed workitem - The user can search workitem on the basis of its status of completion by selecting the desired criteria, i.e. completed, pending or all.
   d) Send Reminder – Officer can send reminder for delegated workitem to their respective HQ / Staff.
   e) Pull Back Workitem – Officer can pull back the delegated workitem from their respective HQ / Staff user's worklist.

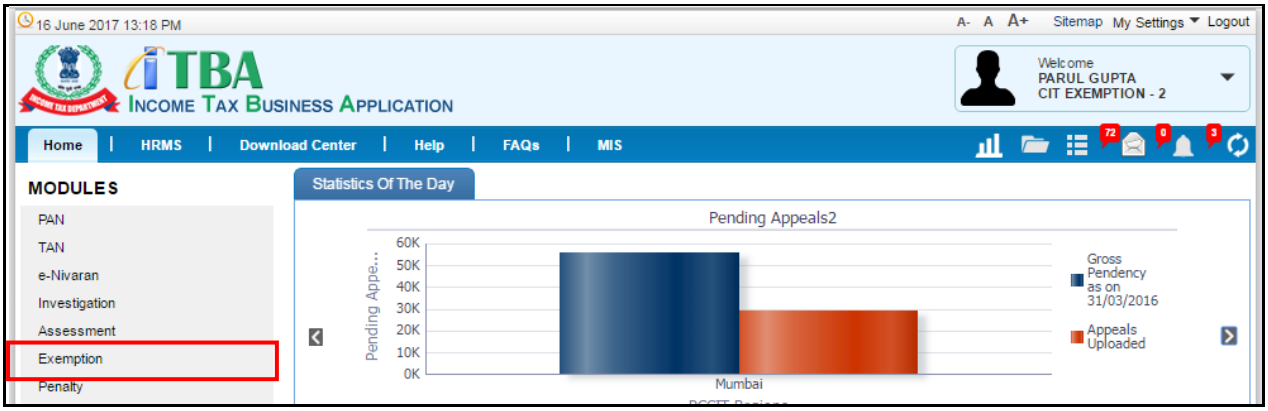
4. Senior Officers will be able to view the pending proceedings including notices issued, hearings conducted, response received from taxpayer through e-Assessment/E-Proceeding, assessment order issued in read only mode, that is, they will not be able to edit the details of the proceedings.

5. Subordinate or HQ/Staff will be able to view the list of cases where approval is pending with their Senior Officer. However, they will not be able to access the workitem/details of the proceedings. For example, AO can check the status of any pending proceeding awaiting approval from Range / PCIT in order to request for any early action if required.

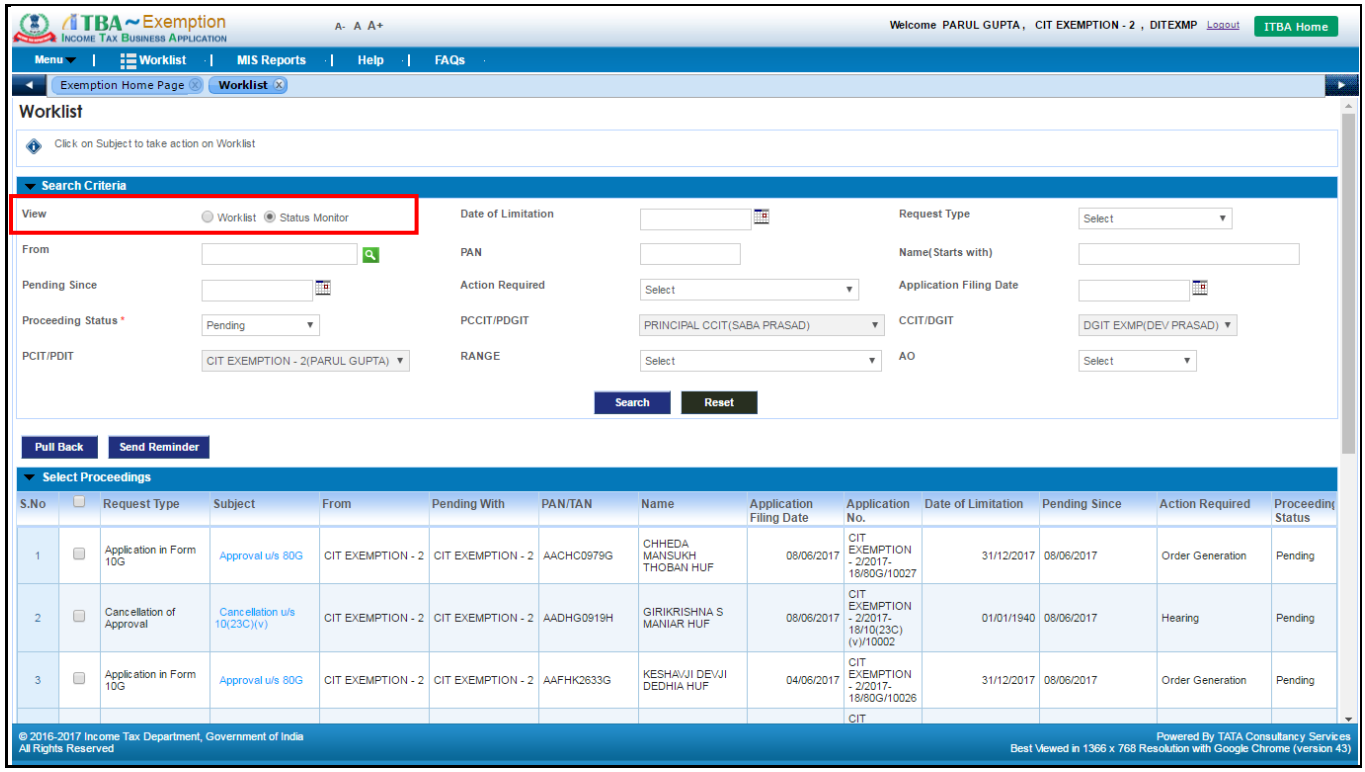
6. AO, Range and subordinate officers can view the list of cases of their superior authority only if they have initiated the proceeding or the part of the proceeding workflow.

7. At present, the following modules of ITBA are available with Status Monitor functionality.
   a) Assessment
   b) Exemption
   c) Penalty

8. Steps to access Status Monitor in ITBA are as below:
   a) Navigate to the worklist of the relevant module.
   Example: Navigate to Assessment Module → Click on Worklist
   b) Click on Status Monitor.
   c) Select the proceeding status and click on Search; list of cases based on the proceeding status selected will be displayed.
   d) Users can also filter cases on the basis of individual officers under their charge and also on the basis of various search criteria available therein.



Screen 1: Navigating to Module → Worklist



Screen 2: Exemption Worklist → Click on Status Monitor

9. Users are advised to contact helpdesk in case of any issues in respect of the ITBA.
   a) URL of helpdesk - http://itbahelpdesk.incometax.net
   b) Help desk number – 0120-2811200
   c) Email ID – 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, CBDT, New Delhi

Copy to:

1. PPS to Chairperson, PPS to Member(Inv.)/ Member(P&V)/ Member(R)/ Member(IT)/ Member(L&C)/ Member(A&J) CBDT for information.
2. Pr. DGIT(Systems), New Delhi
3. The Web Manager with request to upload instruction on www.irsofficersonline.gov.in.
4. ITBA Publisher with request to upload instruction on https://itba.incometax.gov.in

(Ramesh Krishnamurthi)