



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/Common Functions/180/2016-17

Dated: 30/09/2019

To

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

**Subject: Delegate Functionality to delegate work to subordinates
(Inspectors/Staff etc.) in Income Tax Business Application-reg.-**

Sir/Madam,

Kind attention is invited to the DO letter of Pr. DGIT (System) dated 17-09-2019 No. Systems/ITBA/Common Module/160 issued with the approval of Chairman, CBDT to the effect that ITBA users should ensure that subordinates obtain RSA tokens and get it tagged with the respective user so as to facilitate delegation of work by the Officers/ITBA users to their subordinate staff.

2. Workflow management process is an essential functionality which is being used in many processes in ITBA to facilitate delegation of authority. The 'delegate functionality' in the ITBA which allows the users to delegate the work to their subordinate staff is made available in the ITBA. Accordingly, the Initiator of work item can delegate it to another user (Subordinate) who is expected to work on it further. Once the work item is assigned to the other user viz Hqrs. Officer/Inspector/other staff etc. it is displayed in the work list of that user (subordinate) for necessary action as per direction given by the Initiator. Once the assigned user has completed the work, he will submit the work item back to the initiator. Initiator can also pull back the delegated work item from the assigned user for which 'Pullback button' has been provided in the screen.

4. As stated above, the 'Delegate Functionality' is available in various modules of the ITBA. For illustration, the steps to be taken by the Assessing Officer in the Assessment Module are being explained here under for proper understanding of the functionality:-

• **User: Assessing Officer**

1) Enter Workflow Notings and click **Delegate**.

Screen for Delegate the Workitem is displayed on screen.

2) Select the Authority i.e. staff user (to whom Workitem needs to be delegated)

- 3) Enter **remarks**.
- 4) Enter **Compliance date**.
- 5) Click **Ok**.

A success message will be displayed to the user once the Workitem is successfully delegated to Staff user.

• **User: AO'sStaff**

AO Staff user will be able to draft Letter/Notice/Order, enter remarks in Case History/Notings, attach any supporting document as the case maybe and submit the Workitem to the Assessing Officer for further necessary action. Assessing officer can also pull back any of the assigned item from the Staff user at any time, if he wants to do so.

Steps for submitting the Workitem back to the AO once the necessary work regarding the Assessment proceeding is completed by the AO Staff user, are as below:-

- 1) Enter workflow Notings.
- 2) Click **Submit** button.

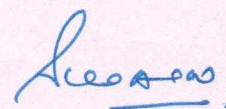
A success message will be displayed to the AO Staff user, once the Workitem is successfully submitted back to the Assessing Officer and it will be visible to AO with updated actions taken by AO Staff.

5. It is clarified that whatever work is done by the staff user will be at draft stage only. The Initiator, i.e the main user can edit the draft and after finalising the said draft, can generate the final notice/letter/order etc. and put his digital signature on the same.

6. **Bulk Delegation** facility is also available in Assessment Worklist for user to delegate multiple assessment work item in a single submission.

Steps to use Bulk delegation in Assessment module are as below:-

- 1) Navigate to Assessment **Worklist**.
- 2) Select the Workitem(s) to be delegated to AO Staff, Inspector, Tax Assistant user, as applicable.
- 3) Click on **Delegate** button.
- 4) Select the Authority i.e. staff user (to whom Workitem needs to be delegated)
- 5) Enter **remarks**.
- 6) Enter **Compliance date**.
- 7) Click **Ok**.



The path for Bulk delegation is: **ITBA Portal → Login → Respective modules → Worklist.**

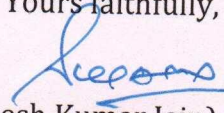
6. The aforementioned steps are common for delegating Workitem in every module by the senior officers to their Hqrs or staff etc., as the case may be, provided that they have RSA token and their role is tagged with the main user.

7. 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)

This issues with the prior approval of the Pr. DGIT(Systems), New Delhi

Yours faithfully,

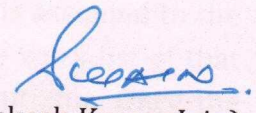


(Suresh Kumar Jain)

Commissioner of Income Tax -ITBA
Directorate of Income Tax (Systems), New Delhi

Copy to:

1. PPS to Chairman, PPS to Member(Inv.)/ Member(Admn)/ Member(R)/ Member(IT)/ Member(Legislation)/ Member(A&J) CBDT for information.
2. Pr. DGIT (Systems), New Delhi.
3. The Web Manager, for www.irsofficersonline.gov.in website with request to upload the instruction on the website.
4. ITBA Publisher (ITBA.Publisher@incometax.gov.in) for <https://itba.incometax.gov.in> portal with request to upload the instruction on the ITBA Portal.



(Suresh Kumar Jain)

Commissioner of Income Tax -ITBA
Directorate of Income Tax (Systems), New Delhi