

User Manual Taxation Access Manager

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User Login

Whenever the page is first called, the home page is displayed, containing, a brief description of the contents of this web portal. (Figure 1)

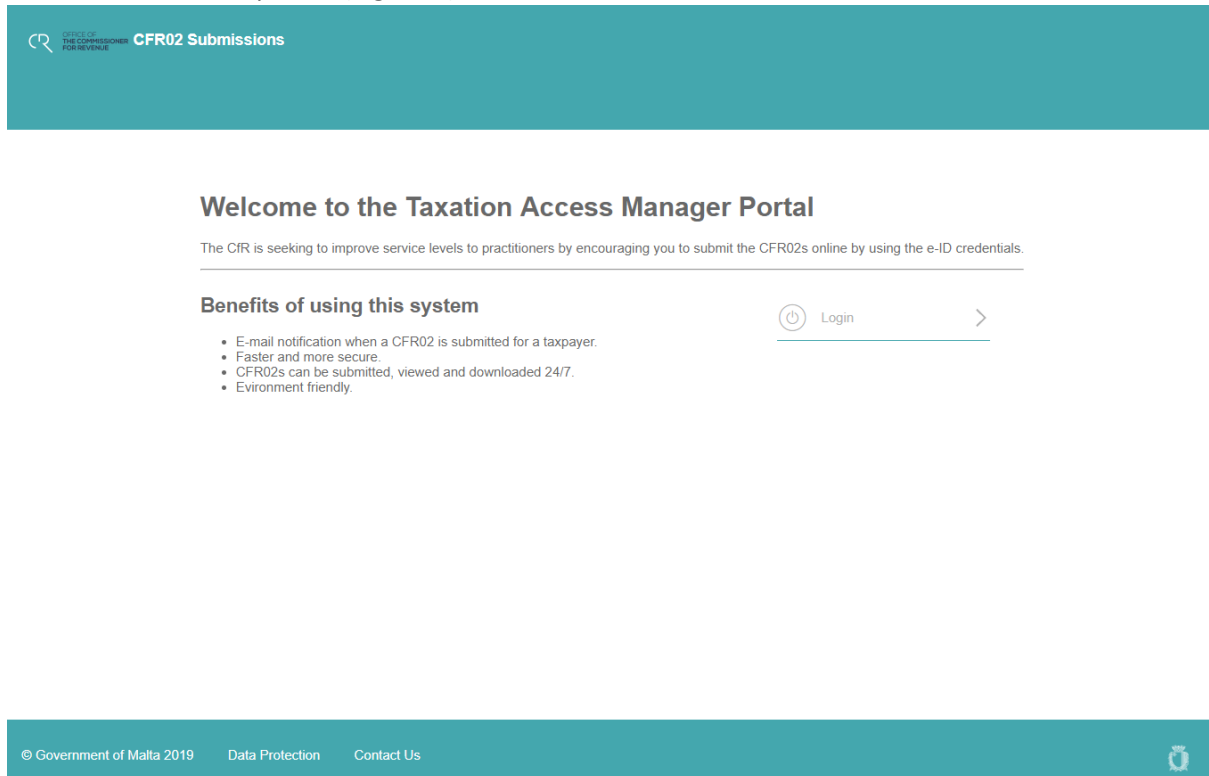


Figure 1 Home Screen

The Login button above would take the user to default MITA login gateway (Figure 2) that would allow for two types of login. Namely, with the use of the E-Id Account MFA (2-Factor Authentication) or else with the E-Id Chip & PIN.

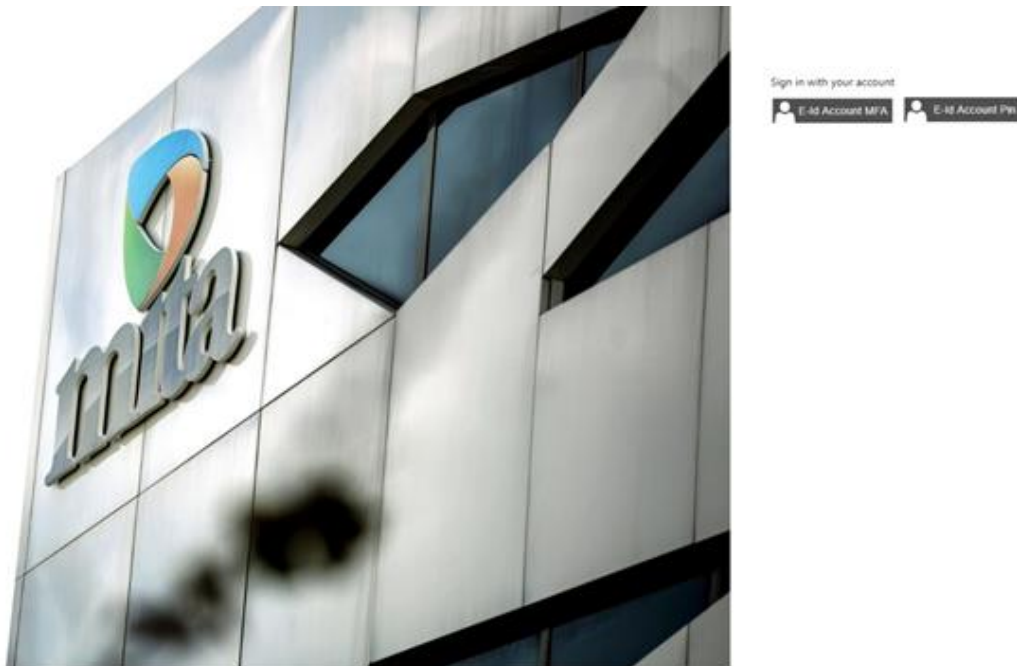
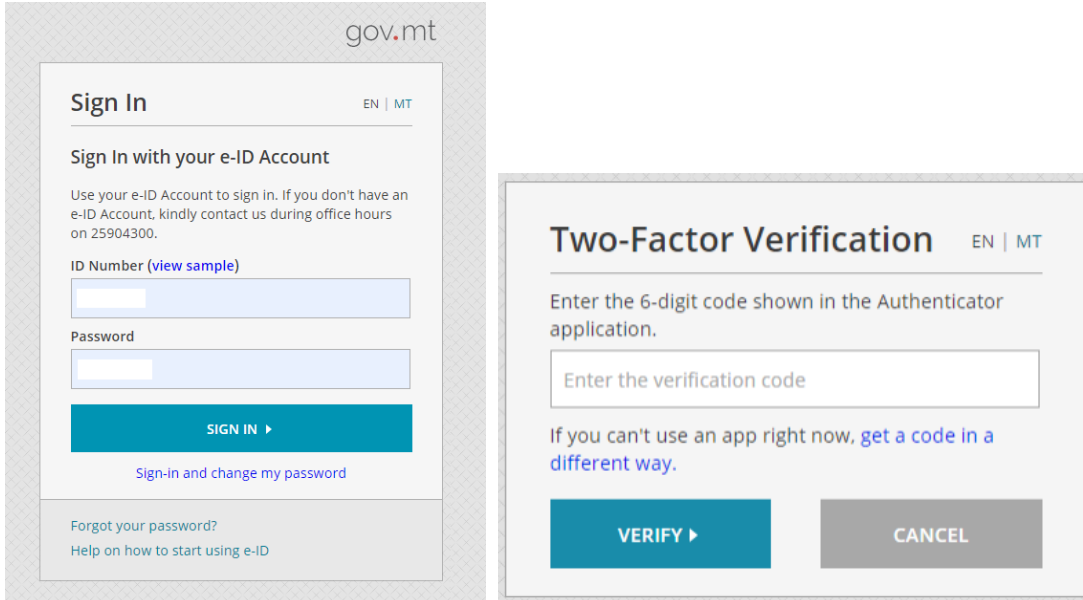


Figure 2 Login Choices

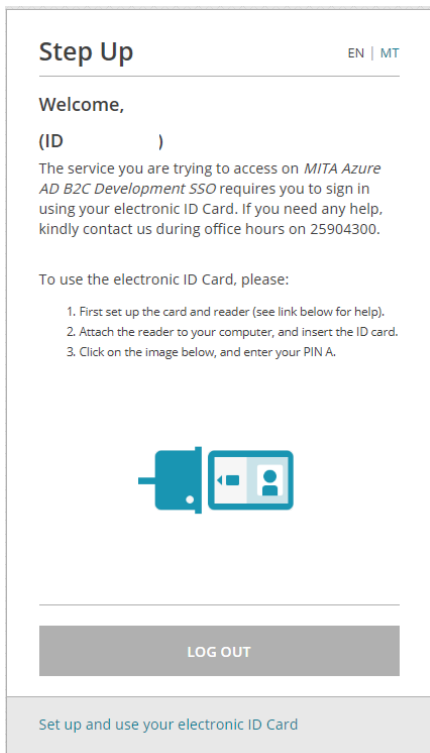
Upon clicking one of the options, the user will be redirected to the login page of the E-ID. (Figure 3). The ID Number and Password required by this page are the same credentials that the user uses to log in to the E-ID services. Since the minimum level required to use the CFR02 Submission Portal is 2 (i.e. 2-Factor Authentication), the user must also input the verification code from the Google Authenticator app.



The image shows two side-by-side screenshots of the E-ID login process. The left screenshot is the 'Sign In' page for 'gov.mt'. It features a 'Sign In with your e-ID Account' section with instructions to use an e-ID account or contact support. It includes input fields for 'ID Number' (with a 'view sample' link) and 'Password', followed by a blue 'SIGN IN' button and a link to 'Sign-in and change my password'. Below this is a 'Forgot your password?' link and a link to 'Help on how to start using e-ID'. The right screenshot is the 'Two-Factor Verification' page, which asks the user to 'Enter the 6-digit code shown in the Authenticator application.' It has a text input field for the code, a link to 'get a code in a different way' if the app isn't available, and two buttons: a blue 'VERIFY' button and a grey 'CANCEL' button.

Figure 3 E-ID Login Page –2-Factor Authentication

If the user chooses the “Chip & PIN” option, apart from the above (including the 2-Factor Authentication part if it is set-up), Figure 4 will be shown to input the Chip & PIN.



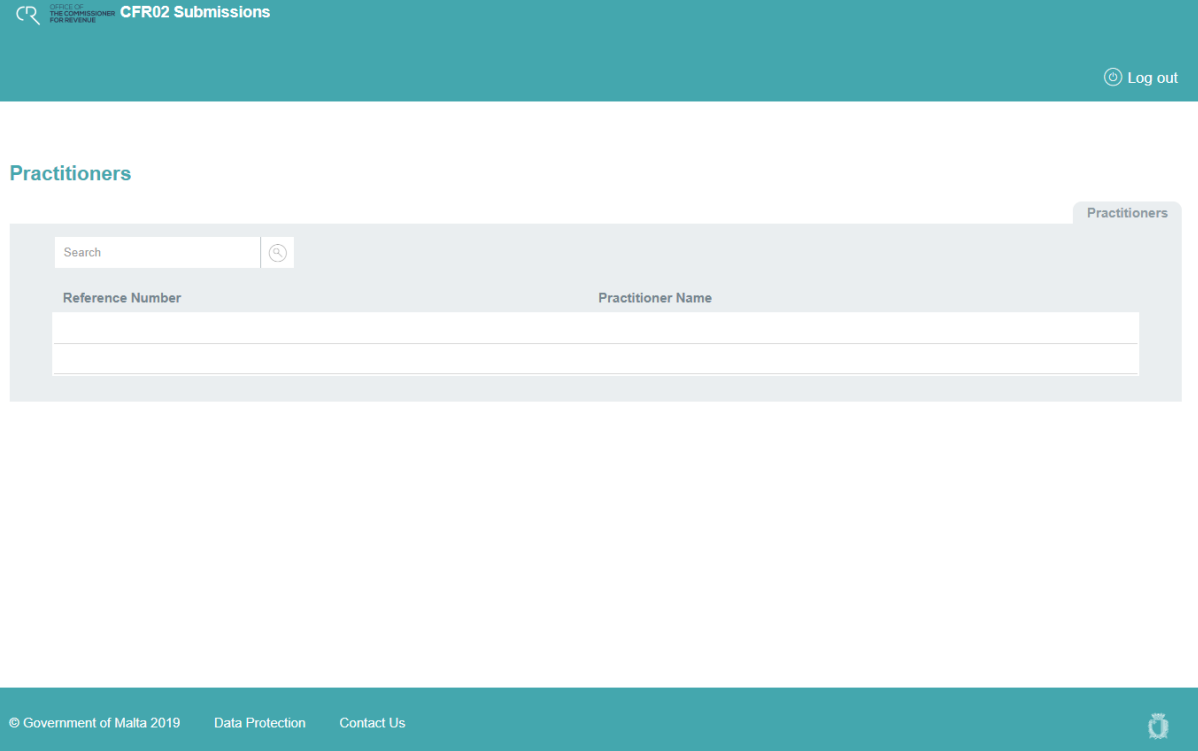
The image shows a screenshot of the 'Step Up' page for 'gov.mt'. It is a 'Welcome' message to a user, with a placeholder '(ID)'. The text explains that the service being accessed on 'MITA Azure AD B2C Development SSO' requires signing in with an electronic ID Card. It provides instructions on how to use the card: 1. Set up the card and reader, 2. Attach the reader to the computer and insert the ID card, and 3. Click on the image below and enter the PIN. Below the instructions is an icon of a card reader connected to a computer. At the bottom of the page is a grey 'LOG OUT' button and a link to 'Set up and use your electronic ID Card'.

Figure 4 E-ID Login Page – Chip & PIN

Authority Forms

Practitioner Selection

After logging in using any of the above-mentioned login methods, the user will be brought to the Practitioners selection screen (Figure 5) if the user is both a sub-user of a tax practitioner and a private practitioner. If the user is only a private tax practitioner or a sub-user, an automatic re-direction will be done showing Figure 6.



The screenshot shows the 'Practitioner Selection' interface. At the top, there is a teal header bar with the 'CFR02 Submissions' logo on the left and a 'Log out' button on the right. Below the header, the word 'Practitioners' is displayed in a teal font. The main content area is a light grey box containing a search bar with a magnifying glass icon and a dropdown arrow. Below the search bar, there is a table with two columns: 'Reference Number' and 'Practitioner Name'. The table is currently empty. At the bottom of the page, there is a teal footer bar with the text '© Government of Malta 2019', 'Data Protection', and 'Contact Us' on the left, and a small circular icon on the right.

Figure 5 Practitioner Selection

Authority Forms Main Menu

Once the respective practitioner is selected (or automatically re-directed), the main menu (Figure 6) will be shown for the practitioner, where the following actions can be executed:

- Create New Authority Form
- View Draft Authority Forms –Any CFR02s Saved as Draft, hence not yet submitted
- View Active Authority Forms – Any CFR02 Submitted (including manual CFR02s)
- Search Authority Forms

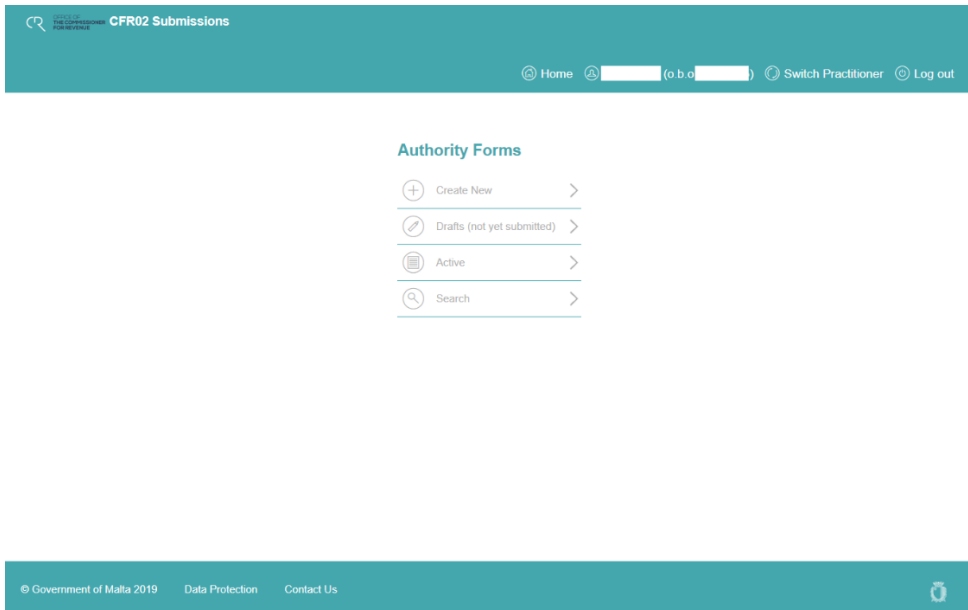
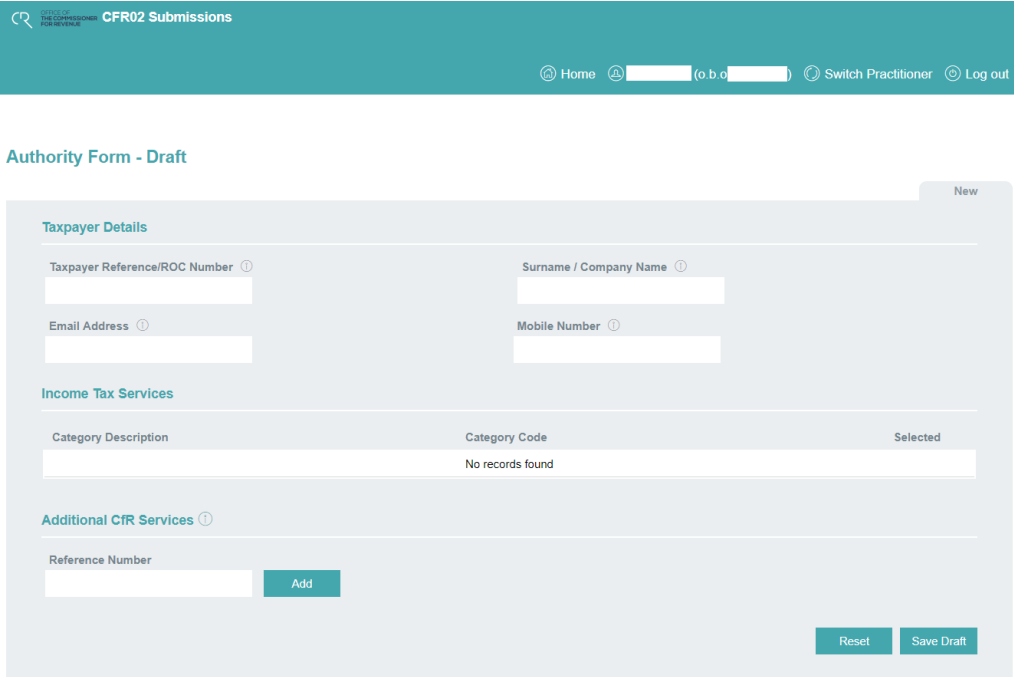


Figure 6 Practitioner Main View

Creation of new Authority Form

Upon the user selecting the Create New button, the Create Draft Authority Form page will be displayed to the user (Figure 7). Once the data has been filled in the form can be submitted and saved with the Save Draft Button on the lower right hand side of the screen.

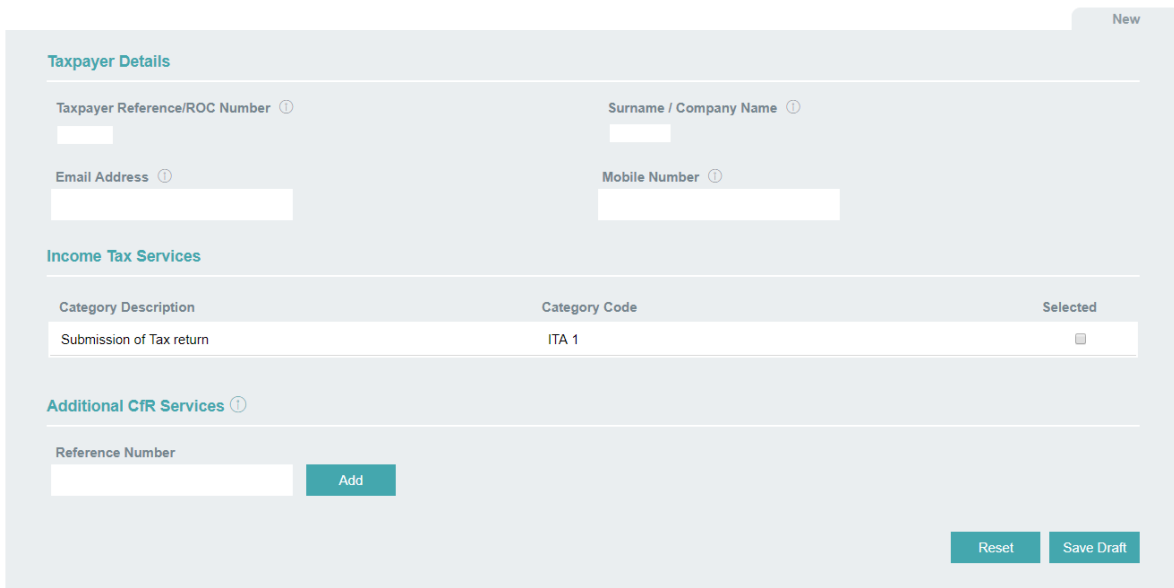


The screenshot shows the 'Authority Form - Draft' page. At the top, there is a teal header with the 'OFFICE OF THE COMMISSIONER FOR REVENUE' logo and 'CFR02 Submissions' text. Navigation links include Home, a user profile icon, Switch Practitioner, and Log out. The main content area is titled 'Authority Form - Draft' and includes a 'New' tab. It is divided into three sections: 'Taxpayer Details' with fields for Taxpayer Reference/ROC Number, Email Address, Surname / Company Name, and Mobile Number; 'Income Tax Services' with a table showing 'No records found'; and 'Additional CFR Services' with a Reference Number field and an 'Add' button. At the bottom right, there are 'Reset' and 'Save Draft' buttons.

Figure 7 Create New Draft Authority Form

Not every taxpayer has access to every service offered by the Office of the Commissioner for Revenue. Therefore, whenever the Taxpayer Reference/ROC Number and the Surname/Company Name is entered only the eligible Income Tax Services are made available. (Figure 8)

Authority Form - Draft



This screenshot shows the 'Authority Form - Draft' page with the 'Income Tax Services' table populated. The 'Taxpayer Details' section is the same as in Figure 7. The 'Income Tax Services' table now has one row: 'Submission of Tax return' with 'ITA 1' as the 'Category Code' and a checked 'Selected' checkbox. The 'Additional CFR Services' section remains the same. The 'Reset' and 'Save Draft' buttons are still present at the bottom right.

Figure 8 Population of Category Description

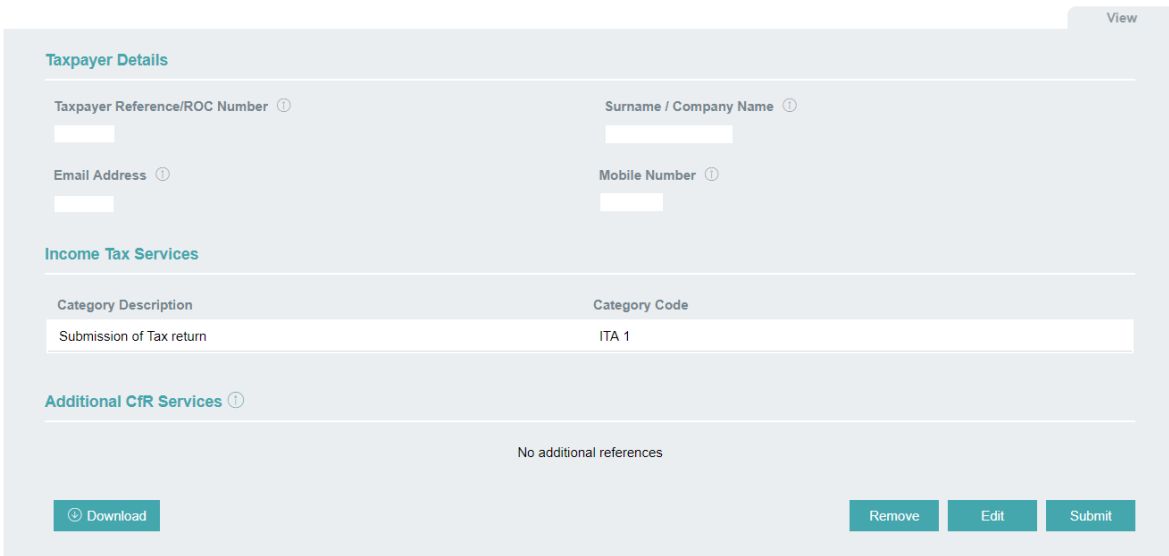
Viewing Draft Authority Forms

Saving the Draft Authority Form, would redirect the user to the view of the newly submitted Draft Authority Form. (Figure 9)

From this page, the tax practitioner has the following functionalities:

- Deletion of Draft Authority Form
- Editing of Draft Authority Form
- Submission of Draft Authority Form to Active
- Download of Draft Authority Form in PDF format

Authority Form - - Draft



Taxpayer Details

Taxpayer Reference/ROC Number	Surname / Company Name
<input type="text"/>	<input type="text"/>
Email Address	Mobile Number
<input type="text"/>	<input type="text"/>

Income Tax Services

Category Description	Category Code
Submission of Tax return	ITA 1

Additional CfR Services

No additional references

[Download](#) [Remove](#) [Edit](#) [Submit](#)

Figure 9 View Draft Authority Form

This view can be accessed within the authority forms main menu, by selecting the Drafts menu item (Figure 10), then any of the rows listed in the Draft Authority Forms List (Figure 11).

Authority Forms





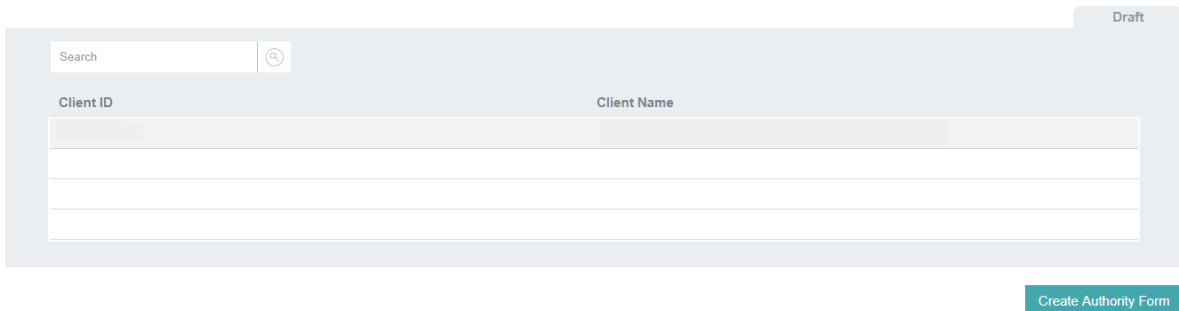
-  Create New >
-  Drafts (not yet submitted) >
-  Active >
-  Search >

Figure 10 Drafts Menu item

Draft Authority Forms



The screenshot displays a web interface for 'Draft Authority Forms'. At the top right, there is a 'Draft' tab. Below it is a search bar with a 'Search' label and a refresh icon. The main area contains a table with two columns: 'Client ID' and 'Client Name'. The table has three rows, with the first row highlighted in light grey. At the bottom right of the interface, there is a teal button labeled 'Create Authority Form'.

Figure 11 Selection of Draft Authority Form from table

Viewing Active Authority Forms

The Tax Practitioner can also view the Active Authority Forms. This can be done from the main menu (Figure 12), by selecting the third entry “Active”. The screen would be populated with the summaries of all the Active Authority Forms (Figure 13).

Authority Forms

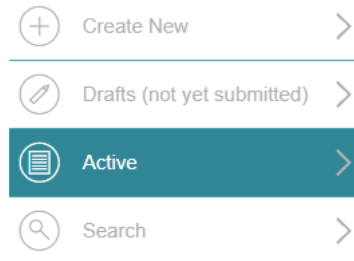


Figure 12 Active Authority Form Menu Item

Active Authority Forms

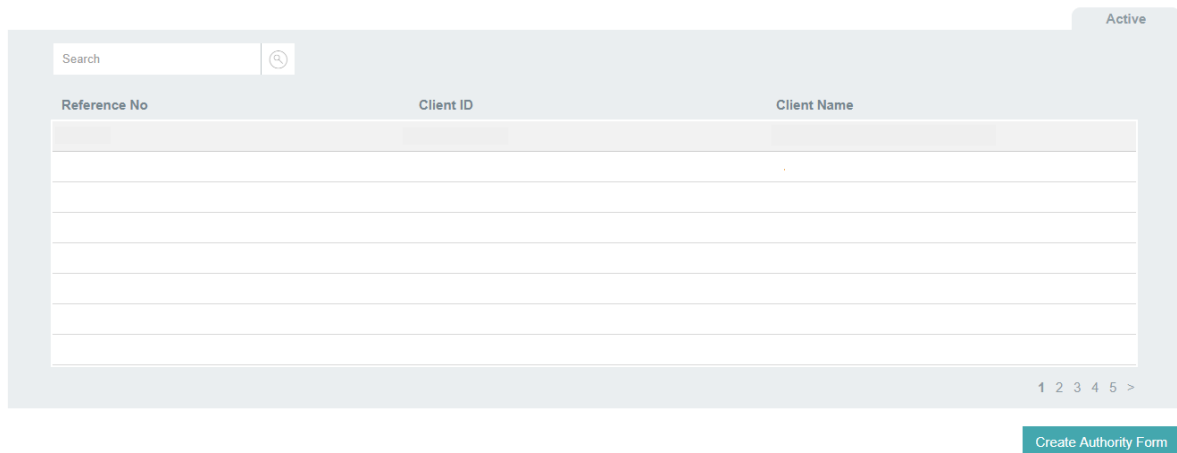
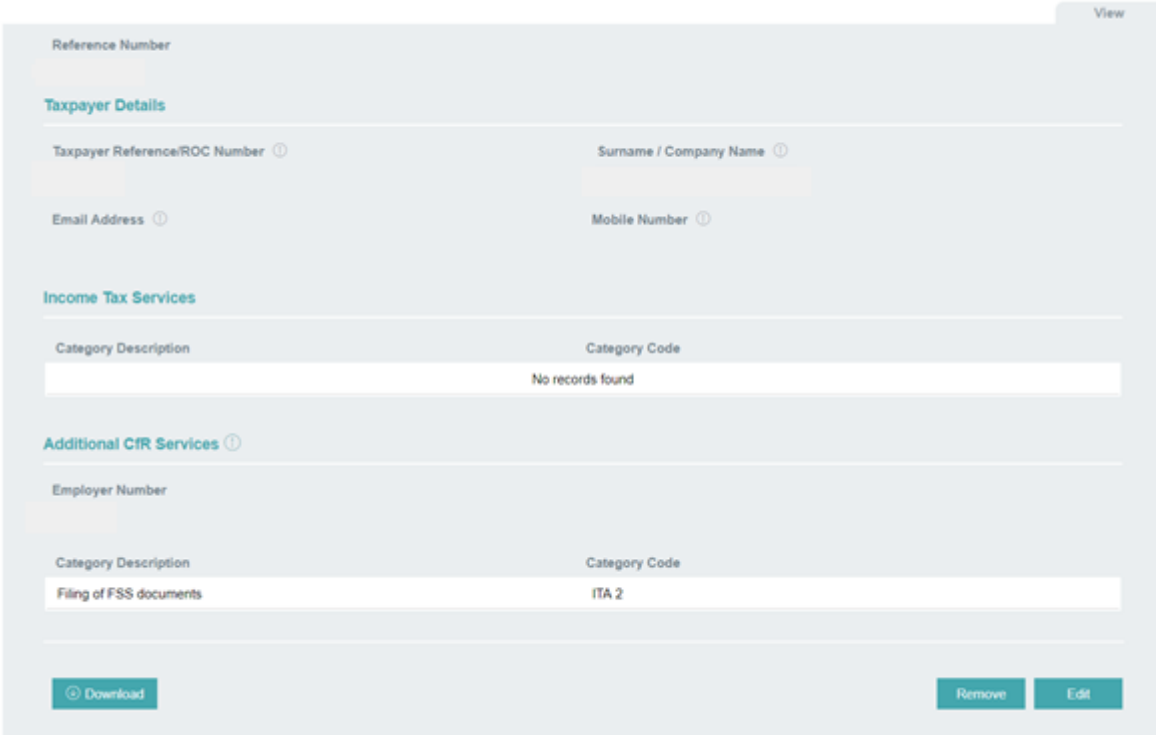


Figure 13 List View of Active Authority Forms

Subsequently, you can select the row of that client. This would redirect you to the details page of the Client Authority Form (Figure 14).

Authority Form -



Reference Number

View

Taxpayer Details

Taxpayer Reference/ROC Number ⓘ	Surname / Company Name ⓘ
Email Address ⓘ	Mobile Number ⓘ

Income Tax Services

Category Description	Category Code
No records found	

Additional CFR Services ⓘ

Employer Number

Category Description	Category Code
Filing of FSS documents	ITA 2

Download Remove Edit

Figure 14 Details of Active Authority Form

From this view, the user can choose to execute the following commands:

- Removal of Active Authority Form
- Editing of Active Authority Form
- Download Active Authority Form in PDF format

Practitioner

Logging Out

Finally, in order to log out of the account, one can simply press the Logout button in the navigation menu as indicated below (Figure 15).

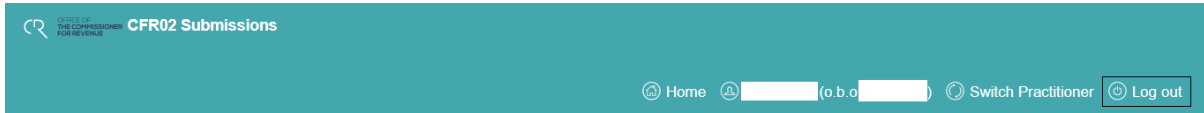


Figure 15 Navigation menu item for Logging out of account