## FREQUENTLY ASKED QUESTIONS (FAQs) -

- ACCESS TAX AGENT E-SERVICES
- ACCESS COMPANY DASHBOARD

(Updated on 25 Aug 2021)

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# A. Accessing the Tax Agent e-Services

## 1. Who can use the Tax Agent e-Services?

Staff of authorised tax agent firms can access the Tax Agent e-Services with its full suite of functions. However, the following authorisations for "Corporate Tax (Filing and Applications)" must be performed in Corppass:

- (i) The tax agent firm has to be authorised by its corporate clients; and
- (ii) The tax agent staff has to be authorised by his or her firm to access the companies' records.

Authorised personnel of the company can also access the Company Dashboard if he or she is authorised in Corppass for "Corporate Tax (Filing and Applications)".

### 2. Is the Tax Agent e-Services available for all tax types?

The Tax Agent e-Services is currently available for Corporate Tax only.

#### 3. How do I access the Tax Agent e-Services?

#### For authorised tax agent staff

Step 1: Log in to myTax Portal using Singpass.

Step 2: At the navigation menu bar on top of the screen, select **Corporate Tax**, then **Access Tax Agent e-Services**.

#### For authorised personnel of the company

Step 1: Log in to myTax Portal using Singpass.

Step 2: At the navigation menu bar on top of the screen, select **Corporate Tax**, then **Access Company Dashboard**.

# 4. What is the icon <sup>①</sup> beside each description header?

The iHelp  $^{\bigcirc}$  provides tips or information on a specific item such as the actions that can be performed. To access the tips or information in the iHelp, simply move your mouse over to  $^{\bigcirc}$ 

# B. Using the Tax Agent e-Services

#### 5. What can I see on the Tax Agent e-Services?

Authorised tax agent staff will see 4 different tabs on the Tax Agent e-Services. The tabs comprise of information on all the authorised clients of that particular staff:

- Overview of all authorised clients
- Statuses of Estimated Chargeable Income (ECI)
- · Statuses of Income Tax Return
- Latest correspondence/ notices issued by IRAS

In addition, the tax agent staff will be able to view the Company Dashboard for individual companies showing the assessment status and other relevant information.

Authorised personnel of the company will be able to view the Company Dashboard only.

# 6. Is there a limit on the number of authorised clients that can be displayed on the Tax Agent e-Services?

No. As long as the tax agent staff has been authorised, he or she will be able to view information pertaining to all his or her clients. However, if the tax agent staff has been authorised as part of a "Client e-Service Group" in Corppass and logs in to myTax Portal for that Client e-Service Group, he or she will only be able to view information pertaining to the clients in the selected Client e-Service Group.

For enhanced user-experience, only tax agent staff with not more than 100 authorised clients can have all his or her clients' information displayed upon login. If the number of authorised clients exceeds 100, the full list will not be displayed but the user can perform a search for his or her individual clients. Alternatively, the user can also export the complete list of clients into an excel spreadsheet.

Similarly, if the tax agent staff logs in for a "Client e-Service Group", and the number of authorised clients in the group exceeds 100, the full list will not be displayed but the user can perform a search for his or her individual clients in the group or export the complete list of clients in the group into an excel spreadsheet.

# C. My Clients' Overview tab

## 7. What information is displayed on My Clients' Overview tab?

Tax agent staff will be able to view the following information:

- Company's Name
- Tax Reference Number
- Financial Year End
- Last Completed Year of Assessment (YA)
- Income Tax Return Not Filed for any YA

To access the Company Dashboard, please click on the **Dashboard** button for the respective client.

## 8. How is information being displayed on My Clients' Overview tab?

The information is displayed in the order of companies with the earliest Income tax return (i.e. Form C-S/C) outstanding as this is the most urgent task that needs to be done. The user may sort the information by clicking on the different column header.

### 9. How many YAs can I view in My Clients' Overview tab?

The information is displayed for up to 4 back YAs.

# D. Estimated Chargeable Income (ECI) tab

#### 10. What information is displayed on the ECI tab?

Tax agent staff will be able to view the ECI filing status of his or her authorised clients for the current and 1 advance YA.

Tax agent staff will be able to view the following information:

- Status Overview of ECI filing
- Company's Name
- Tax Reference Number
- Year of Assessment (YA)
- · Financial Year End
- ECI Due Date

To access the Company Dashboard, please click on the **Dashboard** button for the respective client.

#### 11. What does the Status Overview mean?

The Status Overview is a summary of the number of ECI to be filed, ECI already filed with IRAS and those which you have determined to qualify for ECI waiver.

#### 12. How is information being displayed on the ECI tab?

#### Ready To File section

ECI with the earliest due date will be displayed first as this is the most urgent task to be done.

#### Received By IRAS section

ECI with the **latest submission date** will be displayed first as this is the most recent transaction with IRAS.

#### **Qualify For ECI Waiver section**

ECI with the earliest due date will be displayed first.

Tax agent staff will also be able to sort the information by clicking on the different column headers within the various sections.

13. If my client qualifies for ECI waiver and I move the record from "Ready To File" section to "Qualify For ECI Waiver" section, is this equivalent to a declaration to IRAS?

No. The "Qualify For ECI Waiver" section is a function that allows you to manage your tasks more effectively but does not serve as an application/ notification of ECI waiver to IRAS.

# E. Income Tax Return (ITR) tab

### 14. What information is displayed on the ITR tab?

Tax agent staff will be able to view the income tax return filing status of his or her authorised clients for the current and past 4 YAs.

Tax agent staff will be able to view the following information:

- Status Overview of Form C-S/C filing
- Company's Name
- Tax Reference Number
- Year of Assessment (YA)
- Filing status of
  - o Form C-S/C
  - o Financial Statements
  - Tax Computation
- Due Date to file ITR

To access the Company Dashboard, please click on the **Dashboard** button for the respective client.

#### 15. What does the Status Overview mean?

The Status Overview is a summary of the number of ITR to be filed and ITR already filed with IRAS.

#### 16. How is information being displayed on the ITR tab?

#### Ready To File section

ITRs with the **earliest** YA outstanding will be displayed first as this is the most urgent task to be done.

#### Received By IRAS section

ITRs with the latest YA filed will be displayed first in descending order.

Tax agent staff will also be able to sort the information by clicking on the various column headers within the -sections.

# 17. I have filed my client's Form C for YA 2021 but the record still appears under 'Ready To File'. Why is this so?

A complete set of Return includes Form C, financial statements and tax computation. If any of the required documents are not filed, the record will appear under "Ready To File" section. Please submit the relevant documents by the filing due date.

### F. Mail tab

#### 18. What information is displayed on Mail tab?

Tax agent staff will be able to view correspondence/ notices and myTax Mails that were issued/ sent by IRAS within the last 12 months. The documents are sorted by month.

To view the correspondence/ notices and myTax Mails that were issued/ sent beyond the last 12 months, please click on the <sup>3</sup>How could I view more than 12 months? followed by Correspondence/ Notices or myTax Mails buttons to access the respective e-Services.

To view the different type of correspondences, please click on the respective document names' hyperlink.

To view myTax Mail, click on the **MyTax Mail** button for the respective client.

To access the Company Dashboard, please click on the **Dashboard** button for the respective client.

#### 19. How is information being displayed on the Mail tab?

The latest correspondence/ notices and myTax Mail will be displayed first as this is the most recent document issued/ sent by IRAS.

Tax agent staff will also be able to sort the information by clicking on the different column headers.

# 20. I am authorised to act for my client with effect from today but was unable to view past correspondence/notices. Why is this so?

You will only be able to view correspondence/ notices issued by IRAS with effect from the date of authorisation of the tax agent firm.

#### **Examples**

If company A authorised your firm in Corppass for "Corporate Tax (Filing and Applications)" with effect from 01/01/2021, you will only be able to view correspondence/ notices issued by IRAS on or after 01/01/2021.

If company A authorised your firm in Corppass for "Corporate Tax (Filing and Applications)" with effect from 15/04/2020 and you are in turn authorised in Corppass by your firm on 01/01/2021, you will be able to view correspondence/ notices issued by IRAS on or after 15/04/2020.

# G. Company Dashboard

### 21. What information is displayed on the Company Dashboard tab?

The Company Dashboard will display the following information of the company:

- Company's Name
- Tax Reference Number
- Registered Address
- Financial Year End
- Last Completed YA
- GIRO arrangement for corporate tax payment
- Filing/ Assessment Status of ECI and Income Tax Return
- Date of Latest Notice of Assessment Issued
- Officer-in-charge

Both the authorised tax agent staff and company's employee will be able to access the Company Dashboard.

### 22. How is information being displayed on the Company's Dashboard?

The filing/ assessment status of the company will be displayed for up to 4 back YAs. To view the latest Notice of Assessment, please click on the date of that Notice of Assessment.

#### H. General Information

#### 23. Is the information displayed on all tabs downloadable to an external file?

Tax agent staff can click on the **Export** button to download the information into an excel file for all tabs except for Mail and Company Dashboard.

# 24. How do I enable the Export button again after I have exported the information displayed on the specific tab to an external file?

You can refresh the page or toggle between the 4 different tabs (e.g. from ITR tab to ECI tab and back to ITR tab) to enable the **Export** button.

# 25. The financial year end displayed for the client/ company is wrong. How can I change it?

You do not need to inform or update IRAS of the change in financial year end. However, the company has to file the change with the Accounting and Corporate Regulatory Authority (ACRA) online via <u>BizFile+</u>. IRAS will then update its records based on the information filed with ACRA.

# 26. The company has moved to another location. How can I update IRAS on the new registered address?

You do not need to inform or update IRAS of the change in registered address. However, the company has to file the change with the Accounting and Corporate Regulatory Authority (ACRA) online via <u>BizFile+</u>. IRAS will then update its records based on the information filed with ACRA.

# I. PC Requirements and Technical Help

## 27. Refer to Technical FAQ at myTax Portal.