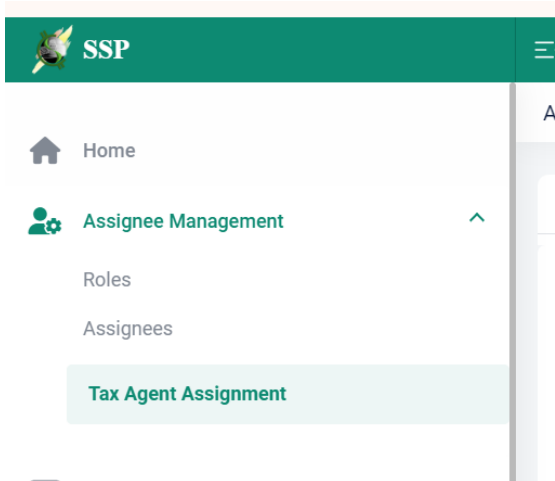




HOW TO APPOINT TAX AGENT IN SELF SERVICE PORTAL V1

A: Taxpayer appoints Tax Agent as following:

1. Taxpayer clicks on **Assignee Management**
2. Taxpayer then clicks on **Tax Agent Assignment**



3. The **Tax Agent Roles and Assignee Details** screen appears
4. The screen has a list of tax types on the left and action buttons on the right.

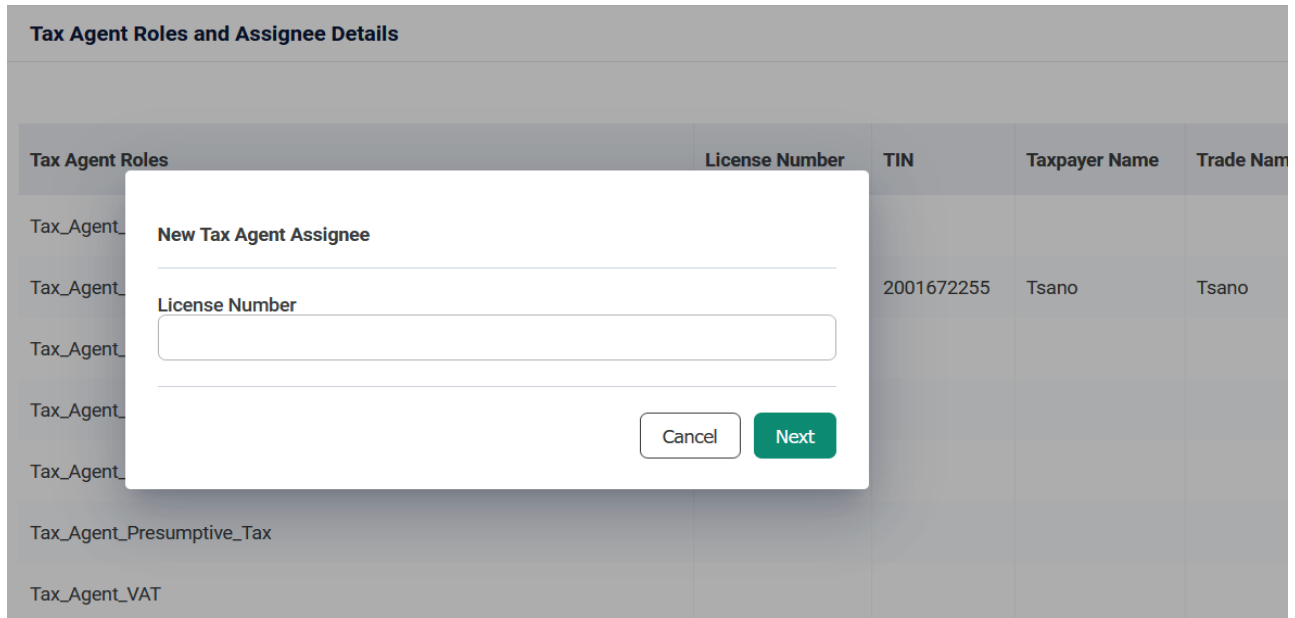
Assignee Management/Tax Agent Assignment

Tax Agent Roles and Assignee Details

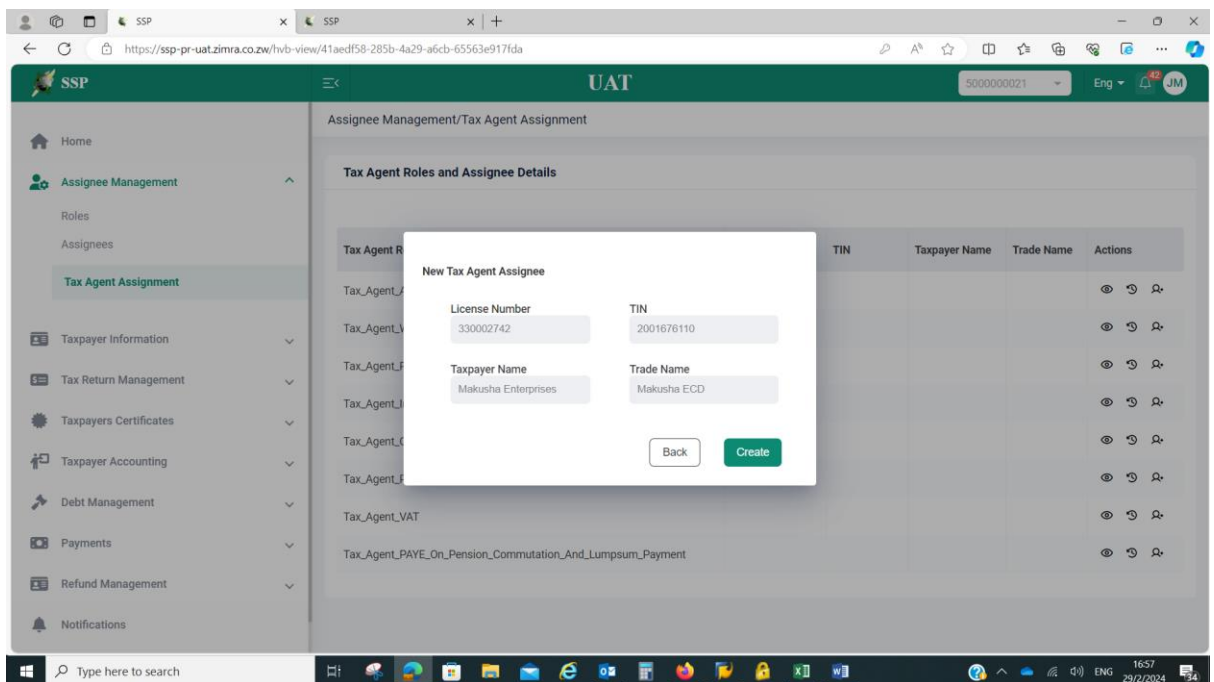
| Tax Agent Roles | License Number | TIN | Taxpayer Name | Trade Name | Actions |
|---|----------------|-----|---------------|------------|---------|
| Tax_Agent_Admin | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_Withholding_Tax | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_PAYE | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_Income_Tax | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_CGT | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_Presumptive_Tax | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_VAT | | | | | 👁️ 🔄 🗑️ |
| Tax_Agent_PAYE_On_Pension_Commutation_And_Lumpsum_Payment | | | | | 👁️ 🔄 🗑️ |



5. Taxpayer selects **Assign Tax Agent** icon and the **New Tax Agent Assignee** screen pops up, then enter tax agent's licence number.



6. Taxpayer inputs license number and clicks **NEXT**
7. A screen appears to confirm agent's details. Click on **Create**





8. Notification is sent to the Tax Agent for approval

The screenshot shows the SSP UAT interface. The main content area is titled "Assignee Management/Tax Agent Assignment". A notification bubble in the top right corner states: "Tax agent assignment request has been sent." Below this, there is a table titled "Tax Agent Roles and Assignee Details".

| Tax Agent Roles | License Number | TIN | Taxpayer Name | Trade Name | Actions |
|---|----------------|-----|---------------|------------|----------|
| Tax_Agent_Admin | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Withholding_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_PAYE | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Income_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_CGT | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Presumptive_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_VAT | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_PAYE_On_Pension_Commution_And_Lumpsum_Payment | | | | | 👁️ ⚙️ 🗑️ |

B: Tax Agent approves the appointment as following:

1. Tax agent clicks on **Taxpayer Information** and then click **Requests**

The screenshot shows the SSP UAT navigation menu. The "Taxpayer Information" item is highlighted in green, and the "Requests" sub-item is also highlighted in green. Other items in the menu include Home, Assignee Management, Taxpayer Profile, Applications, and Drafts.



2. A screen comes up where the Tax Agent finds the request from Taxpayer and click on **Review** under **Actions**

The screenshot shows the SSP UAT interface. The left sidebar contains navigation options: Assignee Management, Taxpayer Information, Tax Return Management, Taxpayers Certificates, Taxpayer Accounting, Debt Management, Payments, Refund Management, Notifications, and Calendar. The main content area is titled 'Taxpayer Registration/Requests' and displays a table of search results. The table has columns for No., Document Reference Number, Request Type, Direction, Submission Date, Status, Status Change Date, and Actions. The second row is highlighted, and the 'Review' button in the Actions column is visible.

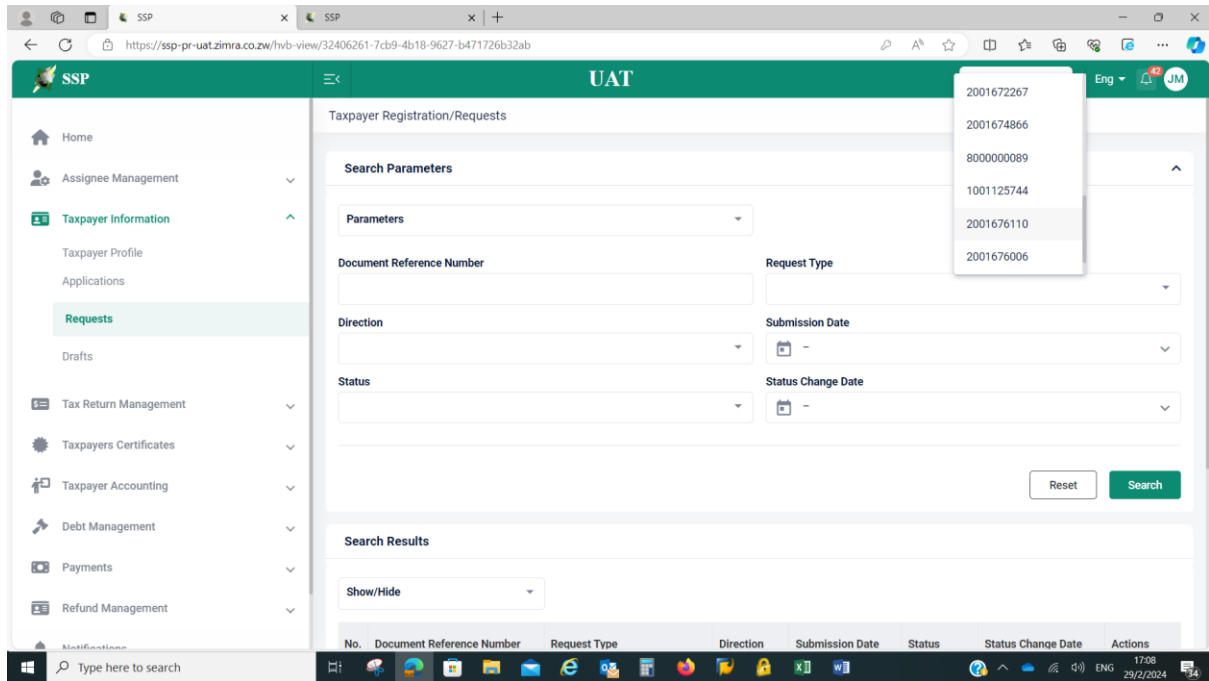
| No. | Document Reference Number | Request Type | Direction | Submission Date | Status | Status Change Date | Actions |
|-----|---------------------------|------------------------------|-----------|-----------------|-----------|--------------------|---------------|
| 1 | Eh629022024002821 | Tax Agent Assignment Request | Received | 29/02/2024 | Submitted | 29/02/2024 16:59 | |
| 2 | Eh629022024002791 | Tax Agent Assignment Request | Received | 29/02/2024 | Approved | 29/02/2024 11:08 | Review |
| 3 | Eh629022024002753 | Tax Agent Assignment Request | Received | 29/02/2024 | Approved | 29/02/2024 09:22 | |
| 4 | Eh629022024002752 | Tax Agent Assignment Request | Sent | 29/02/2024 | Approved | 29/02/2024 09:14 | |

3. Upon clicking **Review**, a Taxpayer Registration/Requests screen comes up where the Tax Agent can **Cancel**, **Reject** or **Approve** the request

The screenshot shows the SSP UAT interface displaying the details of a Tax Agent Assignment Request. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Taxpayer Registration/Requests' and shows the details of the selected request. The details include: Module: Tax Agent Management, Submission Date: 29/02/2024, TIN: 500000021, DRN: Eh629022024002821, Status: Submitted, Taxpayer Name: Shirts, Application Type: Tax Agent Assignment Request, Status Change Date: -, License Number: 330002742, TIN: 2001676110, Taxpayer Name: Makusha Enterprises, and Assigned Role: Tax_Agent_Income_Tax. At the bottom right, there are three buttons: Cancel, Reject, and Approve.



4. After approval of the request, the Tax Agent logs out of SSP, and logs back, then select the taxpayer TIN on the drop-down at the top right corner.

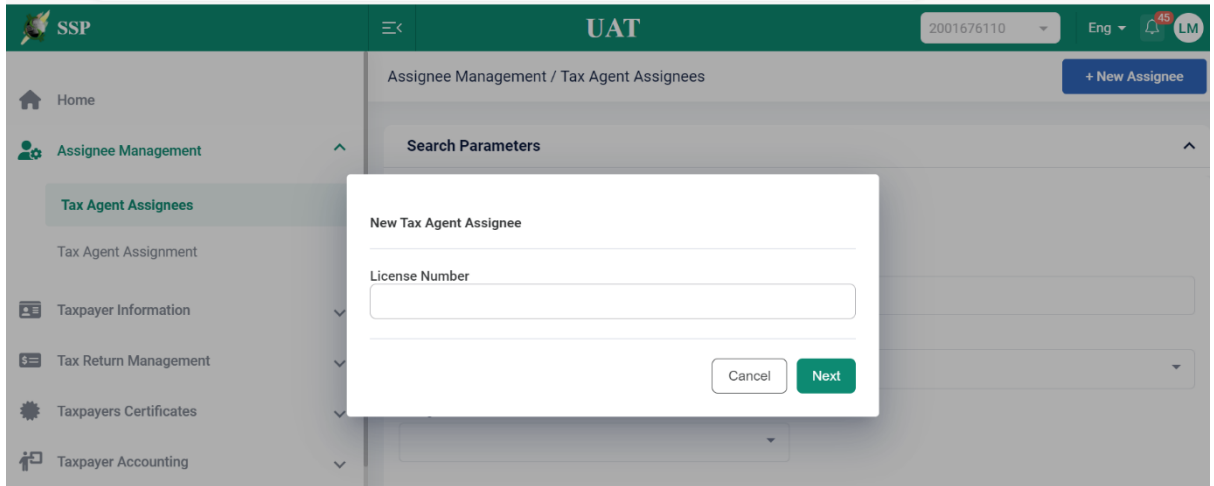


5. While in the selected taxpayer's TIN, the Tax Agent can go to **Assignee Management, Tax Agent Assignment** to check the tax types that the Tax Agent has been assigned by the taxpayer.





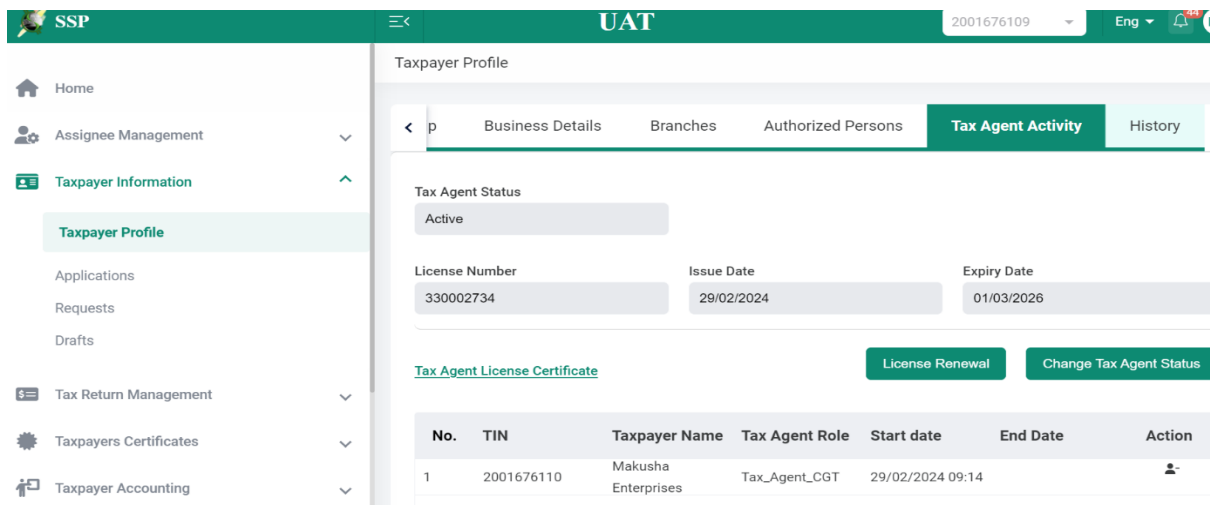
6. While in the selected taxpayer TIN, the Tax Agent can assign their employees tasks by clicking on **Tax Agent Assignees**, then **New Assignee** under the Assignee Management Module. A box will pop up requesting License number of the employee. **No approval of task assignment is required from ZIMRA.**



NOTE: the Tax Agent only has access to the tax types that have been assigned to them by the taxpayer.

C. Termination of Tax Agent Roles by the Tax Agent

1. The Tax Agent logs into SSP and select TaxnAgent TIN
2. Click on **Taxpayer Information**, then **Taxpayer Profile**, and click on **Tax Agent Activity** tab





3. Click the **Remove icon** under **Action** to terminate the Tax Agency

| No. | TIN | Taxpayer Name | Tax Agent Role | Start date | End Date | Action |
|-----|------------|---------------------|----------------|------------------|------------|---|
| 1 | 2001676110 | Makusha Enterprises | Tax_Agent_CGT | 29/02/2024 09:14 | |  Terminate |
| 2 | 2001672231 | Phone | Tax_Agent_PAYE | 29/02/2024 09:10 | 29/02/2024 | |

4. A dialogue box will come up requesting termination reason. After inputting the termination reason, the Tax Agent clicks on **Submit**

Termination Reason *

After clicking **Submit**, the following notification with DRN will appear:

Termination Request For:

The Request for Termination of Authority to Represent the Taxpayer of Makusha Enterprises with application reference number **Eh729022024002823** is successfully Submitted



5. This request will either be approved, or rejected by the Taxpayer being represented by the Tax Agent as following:

a. The Taxpayer click on **Taxpayer Information**, Click on **Requests**, select the appropriate request type, and then click on **Review icon** under **Actions**

The screenshot shows the UAT web application interface. The left sidebar contains a navigation menu with items like Home, Assignee Management, Taxpayer Information, Requests, Drafts, Tax Return Management, Taxpayers Certificates, Taxpayer Accounting, Debt Management, Payments, and Refund Management. The main content area is titled 'Taxpayer Registration/Requests' and displays a table of search results. The table has columns for No., Document Reference Number, Request Type, Direction, Submission Date, Status, Status Change Date, and Actions. There are 5 rows of data, with the second row having a 'Review' icon in the Actions column. Below the table, it shows 'Total Count: 5' and pagination controls.

| No. | Document Reference Number | Request Type | Direction | Submission Date | Status | Status Change Date | Actions |
|-----|---------------------------|--|-----------|-----------------|-----------|--------------------|---------|
| 1 | Eh729022024002823 | Request for Termination of Authority to Represent the Taxpayer | Received | 29/02/2024 | Submitted | 29/02/2024 17:33 | |
| 2 | Eh629022024002821 | Tax Agent Assignment Request | Received | 29/02/2024 | Submitted | 29/02/2024 16:59 | |
| 3 | Eh629022024002791 | Tax Agent Assignment Request | Received | 29/02/2024 | Approved | 29/02/2024 11:08 | |
| 4 | Eh629022024002753 | Tax Agent Assignment Request | Received | 29/02/2024 | Approved | 29/02/2024 09:22 | |
| 5 | Eh629022024002752 | Tax Agent Assignment Request | Sent | 29/02/2024 | Approved | 29/02/2024 09:14 | |

b. The approval or rejection is done here:

The screenshot shows the UAT web application interface for a request approval/rejection form. The form is titled 'Termination Request For:' and contains several input fields. The 'License Number' field is filled with '330002734', the 'TIN' field with '2001676109', and the 'Taxpayer Name' field with 'Vhoro Enterprises'. Below this, there is a section for 'Termination Request For:' with 'TIN' '2001676110', 'Taxpayer Name' 'Makusha Enterprises', and 'Assigned Role' 'Tax_Agent_CGT'. The 'Termination Reason' field is filled with 'teheheje'. At the bottom right, there are three buttons: 'Cancel', 'Reject', and 'Approve'.

Note: Notification will be sent to the Tax Agent upon approval or rejection.



D. Removal of Tax Agent by the Taxpayer without Request for Removal by the Tax Agent

1. Click on Assignee Management, then click on **Tax Agent Assignment**; and a screen with Tax Agent Roles and Assignee details appears.

The screenshot shows the UAT web application interface. The left sidebar contains a navigation menu with 'Assignee Management' expanded to show 'Roles' and 'Assignees', with 'Tax Agent Assignment' selected. The main content area displays a table titled 'Tax Agent Roles and Assignee Details'.

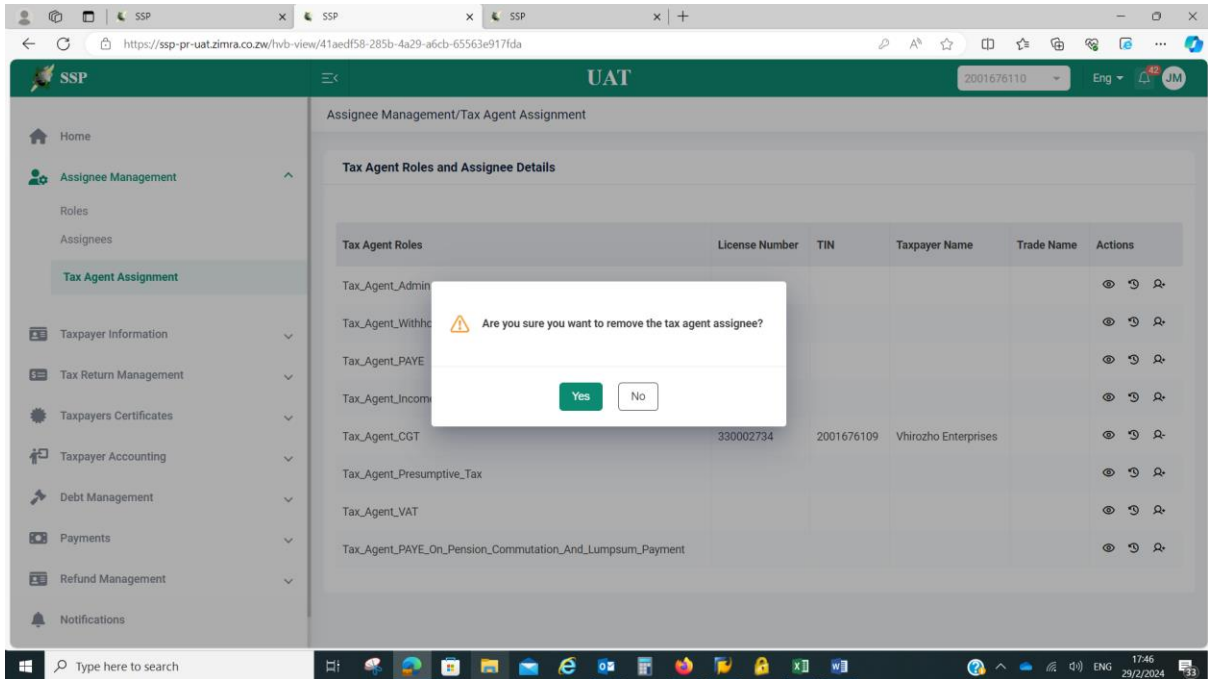
| Tax Agent Roles | License Number | TIN | Taxpayer Name | Trade Name | Actions |
|---|----------------|------------|----------------------|------------|----------|
| Tax_Agent_Admin | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Withholding_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_PAYE | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Income_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_CGT | 330002734 | 2001676109 | Vhirozho Enterprises | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_Presumptive_Tax | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_VAT | | | | | 👁️ ⚙️ 🗑️ |
| Tax_Agent_PAYE_On_Pension_Commutation_And_Lumpsum_Payment | | | | | 👁️ ⚙️ 🗑️ |

2. Select the appropriate Tax Agent to be removed, then click on the **Remove Icon** under **Actions**

This screenshot is identical to the previous one, but with a black tooltip containing the text 'Remove Tax Agent' positioned over the 'Remove' icon (🗑️) in the 'Actions' column of the 'Tax_Agent_CGT' row.



3. A box will pop-up, then click **Yes**.



Note: The taxpayer, without need for approval by the Tax Agent, removes the Tax Agent from the assigned roles.

