



Directorate of Income Tax (Systems)

Annual Information Statement (AIS)

User Guide – AIS Portal

Version 1.0 (October 2021)

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Contents

1	About this Document	4
1.1	Purpose	4
1.2	Document Conventions	4
2	Intended Audience	4
3	Overview	4
3.1	About Project Insight	4
3.2	About AIS	5
3.2.1	AIS Homepage	5
3.3	Accessing AIS through e-filing portal	7
4	Context Based Help (Self Help)	10
5	Annual Information Statement (AIS)	12
5.1	View Annual Information Statement (AIS)	12
5.1.1	Parts in AIS	13
5.1.2	Icons	14
5.1.3	Filters	14
5.2	View AIS Details	15
5.2.1	Information/ Transaction Details (L1 Level Information)	15
5.2.2	Information Source wise aggregated details (L2 Level Information)	16
5.3	Download AIS	16
5.4	Submit Feedback	18
5.4.1	Submit feedback on single information	18
5.4.2	Submit feedback through Bulk Mode	22
5.4.3	Modify Feedback	25
5.4.4	View Feedback History	28
5.4.5	Download Consolidated Feedback	28
6	Taxpayer Information Summary (TIS)	30
6.1	View TIS	30
6.2	Parts in TIS	31
6.3	Download TIS	33
7	Activity History	34
7.1	View AIS Activity History	34
7.1.1	Download files from Activity History	35
8	Resources, Rate Us, Help	36
8.1	Resources	36
8.1.1	User Manual	36
8.1.2	Training Material	37
8.1.3	Utility	37
8.2	Rate Us	38
8.3	Help 38	
8.4	Chatbot	42
8.4.1	Accessing Chatbot	42
9	Glossary	46
10	Annexures	48
10.1	Annexure -A: Customised Feedback Options	48
10.2	Annexure- B: Illustrations for AIS and TIS View	51

1 About this Document

1.1 Purpose

The purpose of this document is to provide a comprehensive understanding of the “Annual Information Statement (AIS)” functionality available at Compliance Portal of the Income-tax Department.

In order to promote transparency and simplifying the tax return filing process, CBDT vide Notification dated May 28, 2020 has amended Form 26AS vide Sec 285BB of Income Tax Act, 1961 r.w.r.114-I of Income Tax Rules, 1962 w.e.f. 01.06.2020. The new Form 26AS is an Annual Information Statement or AIS which will provide a complete profile of the taxpayer for a particular year.

Taxpayers will be able to view their information details for a given financial year and submit feedback against each information.

1.2 Document Conventions

This user guide uses the following conventions:

- Menu items, Options, Dialog boxes and Functions are mentioned in ‘**Bold and quotes**’
- Error messages are displayed in *Italics*
- Angle brackets (>) indicate the progression of menu choices the user should select in a graphical user interface (GUI)
- **Note** provides additional information

2 Intended Audience

The intended audience is citizens who have carried out transactions during the given financial year which may lead to liability of filing ITRs under Income-tax Act, 1961. Taxpayers will be able to access Compliance Portal (AIS Homepage) through e-filing portal (www.incometax.gov.in) to view their Annual Information Statement (AIS), Taxpayer Information Summary (TIS) and submit feedback on information displayed under AIS.

3 Overview

3.1 About Project Insight

Income Tax Department initiated Project Insight to focus on three goals namely (i) to promote voluntary compliance and deter noncompliance; (ii) to impart confidence that all eligible persons pay appropriate tax; and (iii) to promote fair and judicious tax administration. Under this project, an integrated data warehousing and analytical platform has been rolled out. The project also operationalizes two centres namely Income Tax Transaction Analysis Centre (INTRAC) and Compliance Management Centralized Processing Centre (CMCPC).

3.2 About AIS

Annual Information Statement (AIS) is comprehensive view of information for a taxpayer displayed in Form 26AS. Taxpayer can provide feedback on information displayed in AIS. AIS shows both reported value and modified value (i.e. value after considering taxpayer feedback) under each section (i.e. TDS, SFT, Other information).

The objectives of AIS are:

- Display complete information to the taxpayer with a facility to capture online feedback
- Promote voluntary compliance and enable seamless prefilling of return
- Deter non-compliance

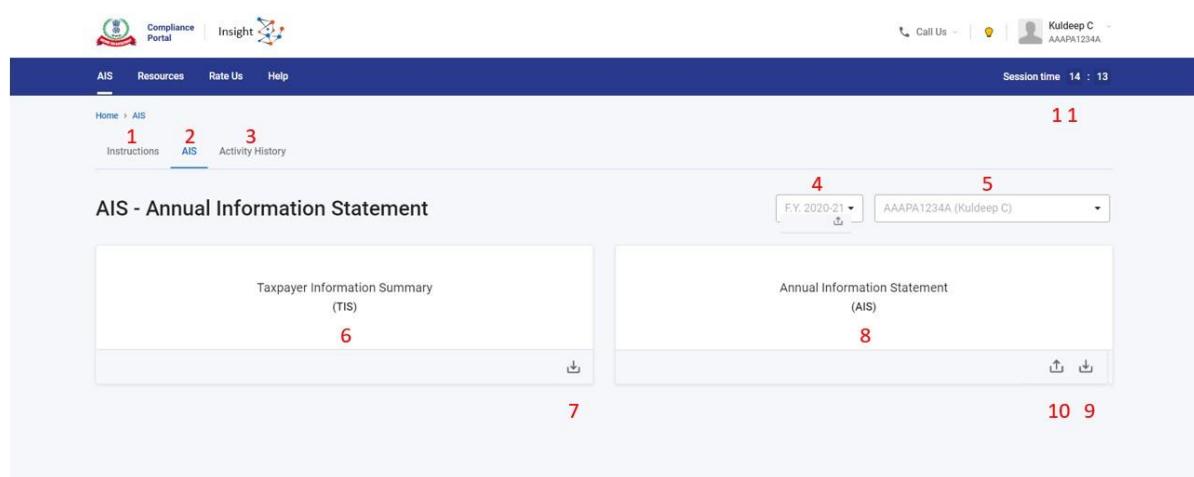
Salient Features of AIS are:

- Inclusion of new information (interest, dividend, securities transactions, mutual fund transactions, foreign remittance information etc.)
- Use of Data Analytics to populate PAN in non-PAN data for inclusion in AIS.
- Deduplication of information and generation of a simplified Taxpayer Information Summary (TIS) for ease of filing return (pre-filling will be enabled in a phased manner).
- Taxpayer will be able to submit online feedback on the information displayed in AIS and also download information in PDF, JSON, CSV file formats.
- AIS Utility will enable taxpayer to view AIS and upload feedback in offline manner.
- AIS Mobile Application will enable taxpayer to view AIS and upload feedback on mobile.

Disclaimer: Annual Information Statement (AIS) includes information presently available with Income Tax Department. There may be other transactions relating to the taxpayer which are not presently displayed in Annual Information Statement (AIS). Taxpayer is expected to check all related information and report complete and accurate information in the Income Tax Return.

3.2.1 AIS Homepage

The Annual Information Statement (AIS) homepage provides key components/ functions for AIS and TIS view. The same can be accessed through Compliance Portal (AIS Homepage).



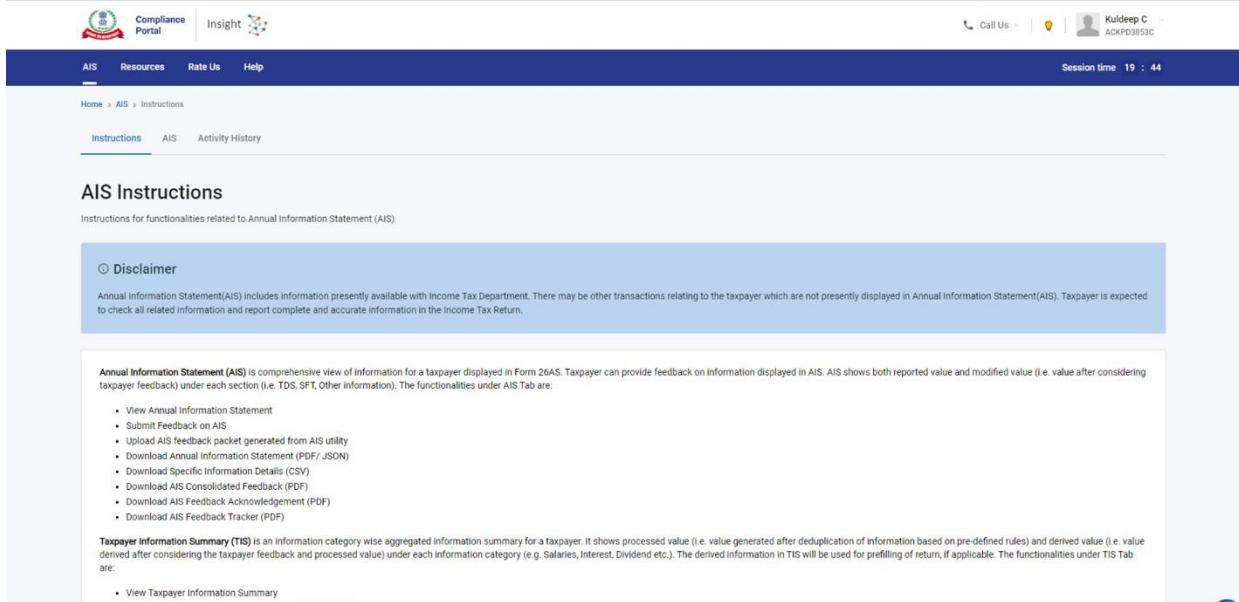
The screenshot shows the AIS homepage with the following numbered components:

- 1. Home icon and 'Compliance Portal' text.
- 2. AIS logo.
- 3. Activity History link.
- 4. Session time: 14 : 13.
- 5. User profile: Kuldeep C (AAAPA1234A).
- 6. Taxpayer Information Summary (TIS) link.
- 7. AIS - Annual Information Statement link.
- 8. Annual Information Statement (AIS) link.
- 9. Call Us link.
- 10. Help link.

Figure 1 AIS Homepage

Following are the key components / functions available on AIS homepage:

- (1) Instructions Tab:** Instructions for functionalities related to Annual Information Statement (AIS) are displayed in this tab.



The screenshot shows the 'AIS Instructions' page. At the top, there are links for 'AIS', 'Resources', 'Rate Us', and 'Help'. On the right, there are links for 'Call Us', a user profile for 'Kuldeep C', and 'Session time 19 : 44'. The main content area is titled 'AIS Instructions' and contains a sub-section 'Instructions for functionalities related to Annual Information Statement (AIS)'. It includes a 'Disclaimer' section with a note about the information being present in the Income Tax Department. Below this, there are two main sections: 'Annual Information Statement (AIS)' and 'Taxpayer Information Summary (TIS)'. The AIS section lists various functionalities like View Annual Information Statement, Submit Feedback on AIS, etc. The TIS section lists View Taxpayer Information Summary. The URL in the address bar is https://ais.compliance.egov.in/ais/instructions.

Figure 2 AIS Instructions

- (2) AIS Tab:** Facility to view Taxpayer Information Summary (TIS) and Annual Information Statement (AIS) is provided under this tab.
- (3) Activity History Tab:** User can check list of activities performed through this tab. (Refer [Activity History](#))
- (4) Select Financial Year:** User can choose the FY for which the AIS/ TIS is to be viewed.
- (5) Taxpayer PAN:** User can view their PAN for which the AIS/ TIS is to be viewed.
- (6) Taxpayer Information Summary (TIS):** TIS is an information category wise aggregated information summary for a taxpayer. It shows processed value (i.e., value generated after processing of information through various pre-defined rules) and derived value (i.e., value derived after considering the taxpayer feedback and processed value) under each information category (e.g., Salaries, Interest, Dividend etc.). The derived information in TIS will be used for prefiling of Return. (Refer [Taxpayer Information Summary \(TIS\)](#))
- (7) Download TIS:** User can download TIS in provided formats (PDF, JSON) using the download icon. (Refer [Download TIS](#))
- (8) Annual Information Statement (AIS):** Annual Information Statement (AIS) is comprehensive view of information for a taxpayer displayed in Form 26AS. Taxpayer can provide feedback on information displayed in AIS. AIS shows both reported value and modified value (i.e. value after considering taxpayer feedback) under each section (i.e. TDS, SFT, Other information). (Refer [Annual Information Statement \(AIS\)](#))
- (9) Download AIS:** User can download AIS in provided formats (PDF, JSON) using download icon. User can also download consolidated feedback. (Refer [Download AIS](#))
- (10) Upload:** User can upload AIS feedback file exported from AIS Utility using upload icon. (Refer AIS Utility User Guide in the Resources section of Compliance Portal (AIS Homepage))
- (11) Session Time:** This will display the time remaining for the current session. User can choose to keep the session active by choosing the relevant option in the prompt.

3.3 Accessing AIS through e-filing portal

Taxpayers can access their AIS by navigating through the e-filing portal and log in through relevant user ID (PAN/ Aadhaar):

Step 1: Visit the e-filing portal by using the URL <https://www.incometax.gov.in/>.

Step 2: On top-right of the homepage, click on “Login” button.

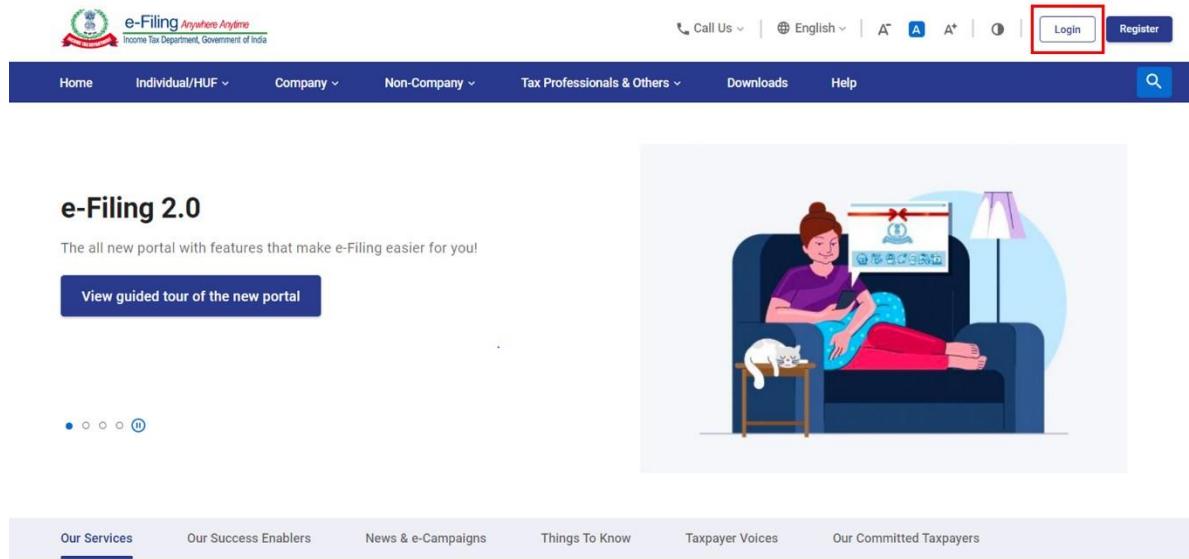


Figure 3 e-filing portal homepage

Step 3: Enter user ID and click on “Continue”

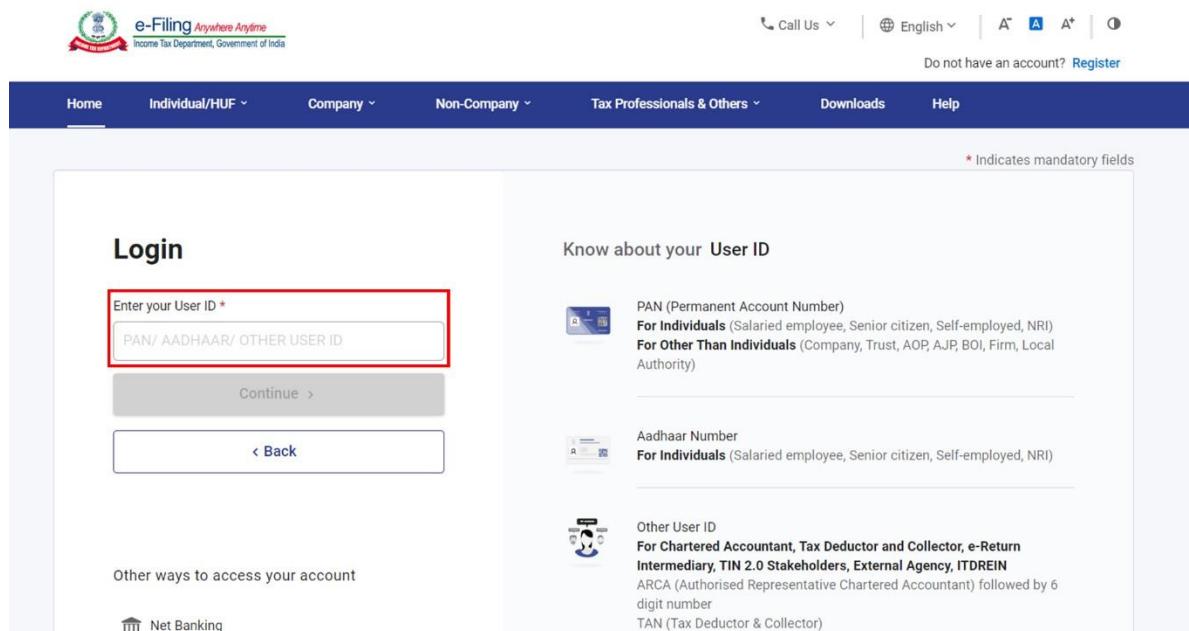
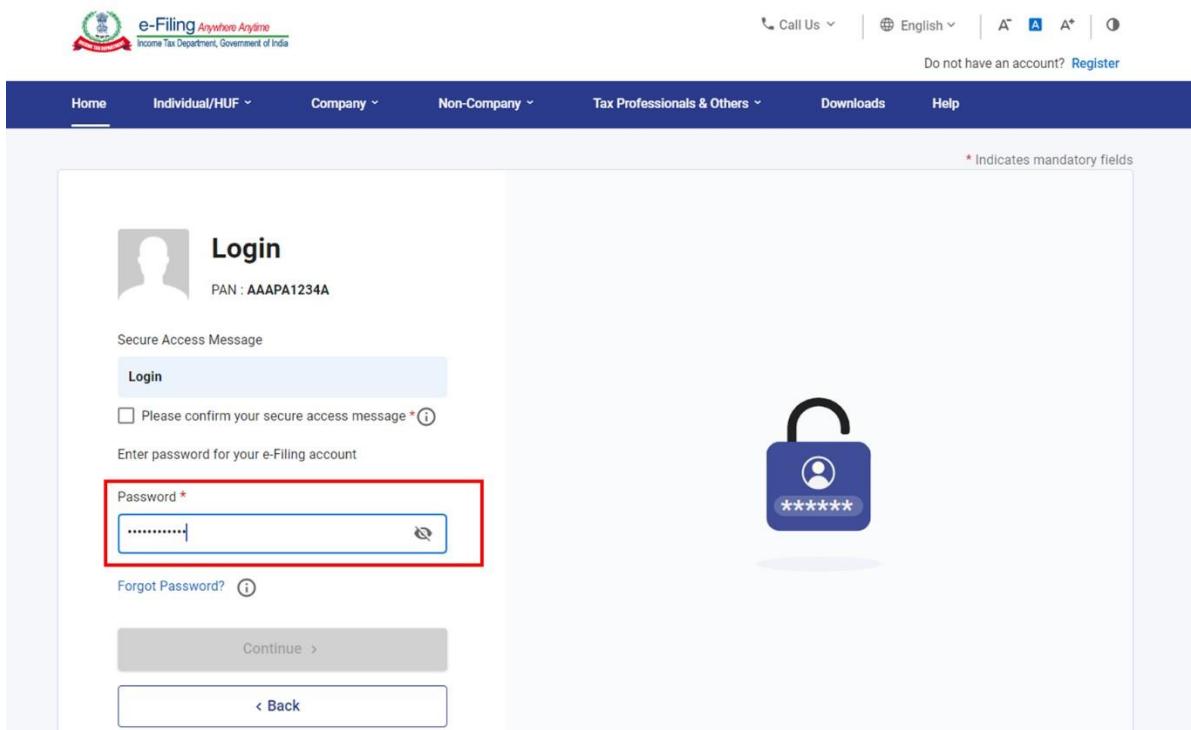


Figure 4 e-filing portal login page

Step 4: Fill in the password and click on “Continue” to navigate to e-filing portal homepage



Call Us | English | A A+ | [Register](#)

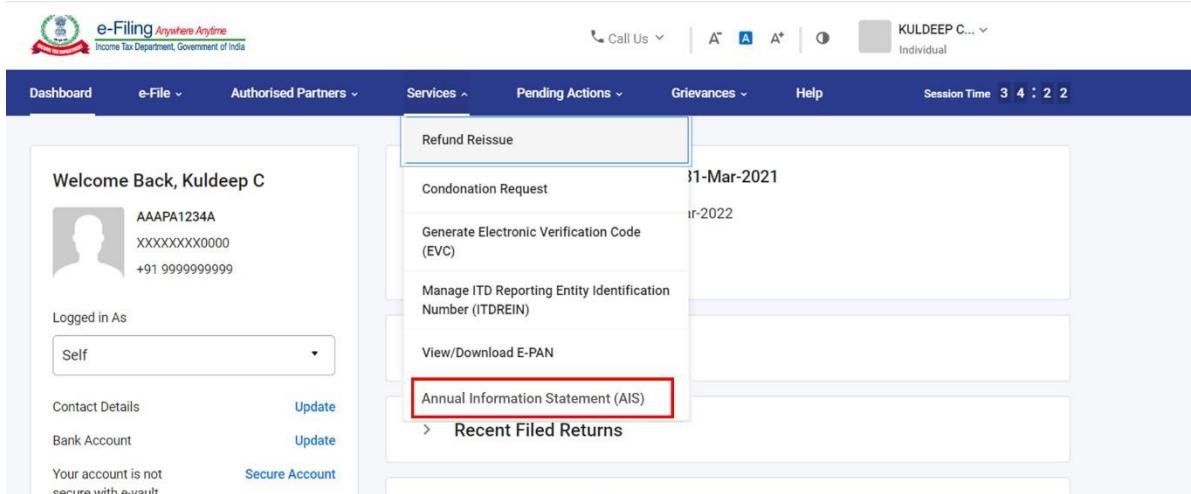
Home Individual/HUF Company Non-Company Tax Professionals & Others Downloads Help

* Indicates mandatory fields

Figure 5 e-filing portal login page

Note: If the user is not already registered, then registration must be completed first by clicking on the “Register” button available on e-filing portal and then providing relevant details. After successful registration, login step can be performed on the e-filing portal.

Step 5: Click the “Annual Information Statement (AIS)” available under “Services” tab to navigate to AIS Homepage.



Call Us | English | A A+ | [KULDEEP C...](#) Individual

Dashboard e-File Authorised Partners Services Pending Actions Grievances Help Session Time 3 4 : 2 2

Welcome Back, Kuldeep C

AAAPA1234A
XXXXXX0000
+91 9999999999

Logged in As: Self

Contact Details: Update
Bank Account: Update
Your account is not secure with e-vault: Secure Account

Refund Reissue

Condonation Request: 31-Mar-2021

Generate Electronic Verification Code (EVC): IR-2022

Manage ITD Reporting Entity Identification Number (ITDREIN)

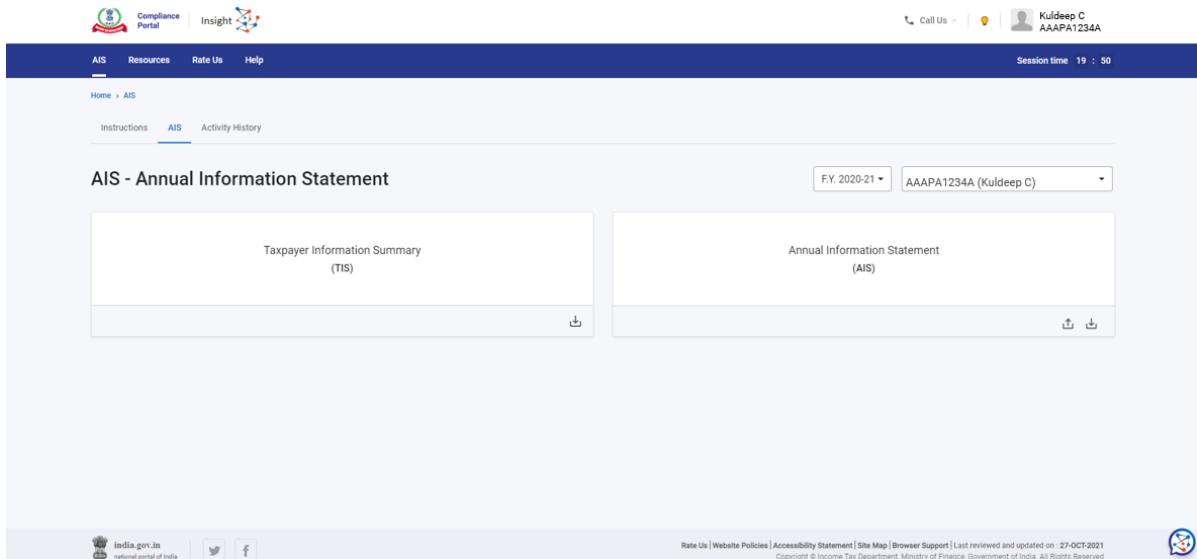
View/Download E-PAN

Annual Information Statement (AIS)

> Recent Filed Returns

Figure 6 e-Filing profile page

Step 6: On AIS Homepage, access the functions available on AIS homepage. (Refer [About AIS](#))



The screenshot shows the AIS homepage with the following layout:

- Header:** Includes the "Compliance Portal" logo, "Insight" logo, "Call Us" button, user profile for "Kuldeep C" (AAAPA1234A), and "Session time 19 : 50".
- Navigation:** "AIS", "Resources", "Rate Us", "Help".
- Breadcrumbs:** "Home > AIS".
- Sub-navigation:** "Instructions", "AIS" (which is underlined), "Activity History".
- Main Content:**
 - Taxpayer Information Summary (TIS):** A large, empty box with a downward arrow icon.
 - Annual Information Statement (AIS):** A large, empty box with a downward arrow icon.
- Footer:** "India.gov.in national portal of India" with social media icons for Twitter and Facebook. Legal links: "Rate Us", "Website Policies", "Accessibility Statement", "Site Map", "Browser Support". Last reviewed on: 27-OCT-2021. Copyright © Income Tax Department, Ministry of Finance, Government of India. All Rights Reserved.

Figure 7 AIS Homepage

4 Context Based Help (Self Help)

AIS functionality also provides facility to display context-based help on the AIS Homepage in case user wants details/ description to understand the various information/ terms displayed. The same can be enabled by following below mentioned steps:

Step 1: Click on bulb icon present at the top right of the portal screens to enable context specific help.

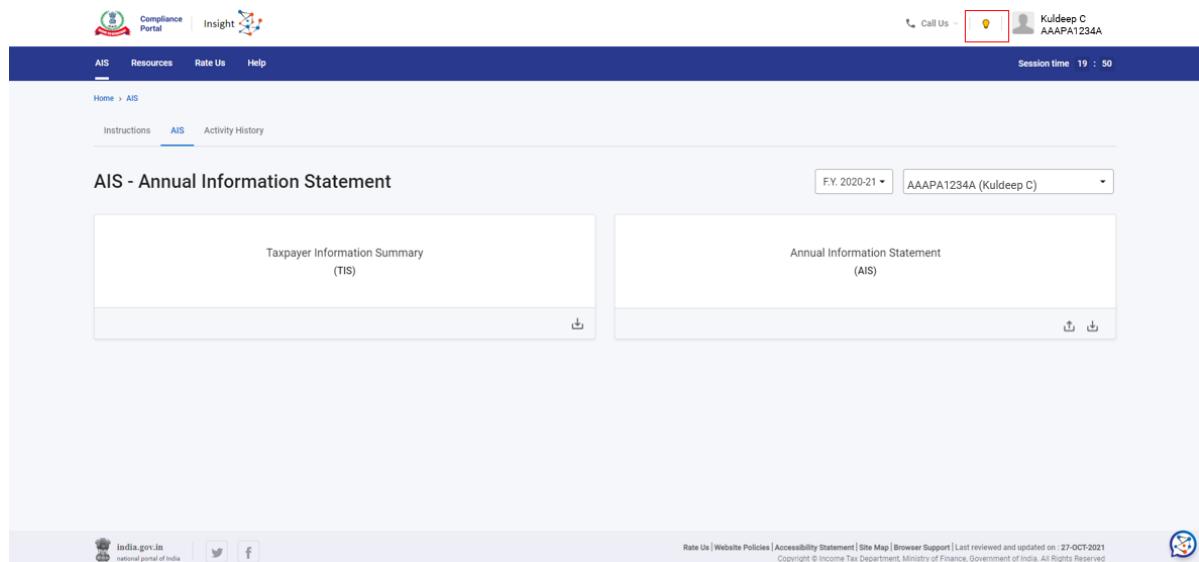


Figure 8 Context based Help

Step 2: Hover the mouse pointer across information/ term where you are facing difficulty to view the bulb icon.

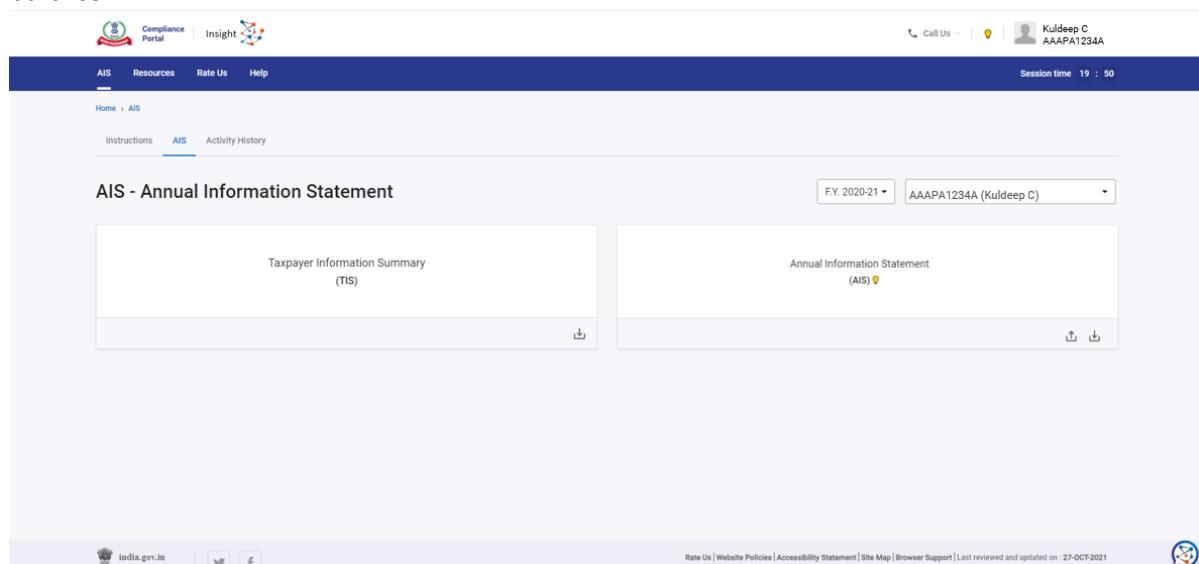


Figure 9 Context based Help hovering

Step 3: Click on the bulb icon besides the information to view tooltip style information description and related links.

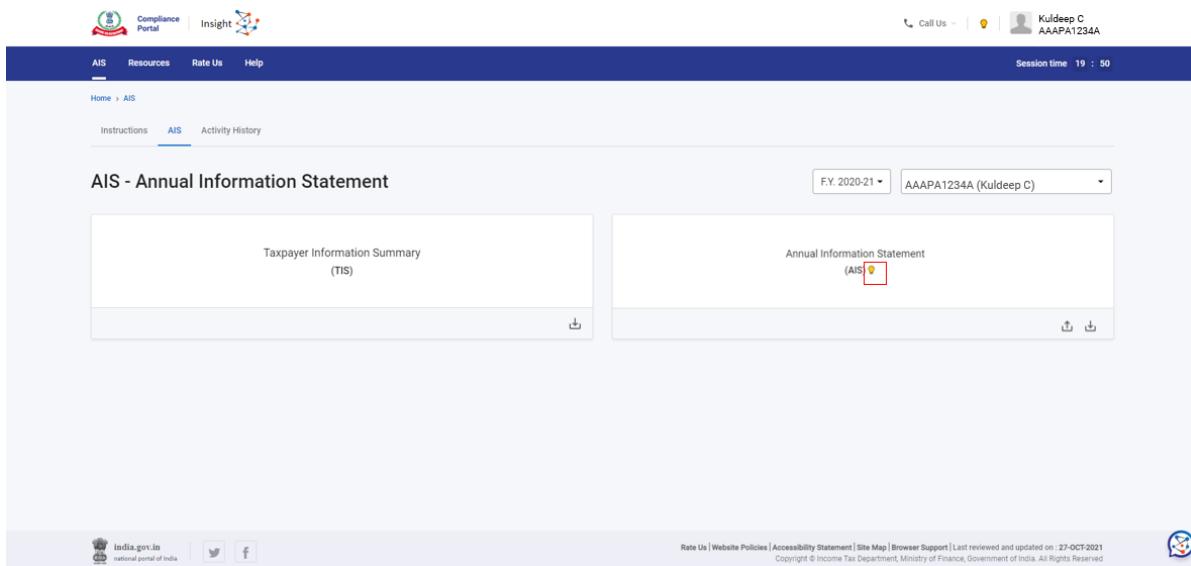


Figure 10 Context based specific help

Step 4: Click on keywords within related links to view additional information description and related links for the new keyword clicked.

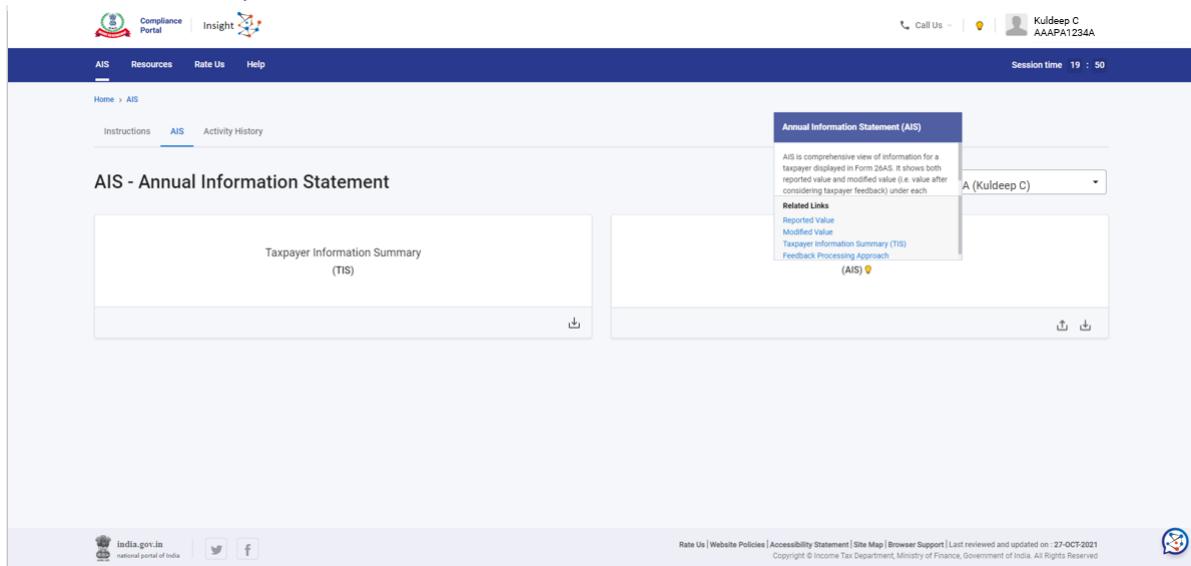


Figure 11 Context based related help

Step 5: Click anywhere outside of the tooltip style window to close the information description.

Note: The bulb icon besides information/ term will only be visible on hovering if the description for that information/ term is available.

5 Annual Information Statement (AIS)

Annual Information Statement (AIS) is comprehensive view of information for a taxpayer displayed in Form 26AS. Taxpayer can provide feedback on information displayed in AIS. AIS shows both reported value and modified value (i.e. value after considering taxpayer feedback) under each section (i.e. TDS, SFT, Other information).

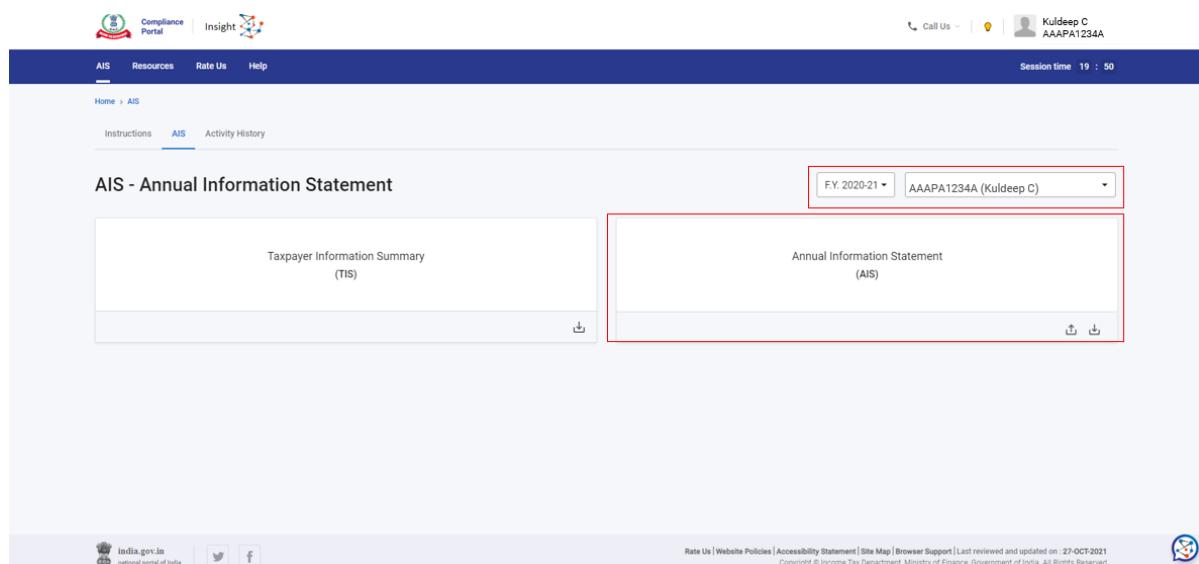
5.1 View Annual Information Statement (AIS)

After accessing the AIS homepage, user can view the AIS through following steps:

Step 1: Select relevant Financial Year and PAN for which the AIS is to be viewed.

Step 2: Click on **Annual Information Statement (AIS)** tile to view your AIS details.

Step 3: User is navigated to AIS page showing two parts: Part-A (General Information) and Part-B (Descriptive Reported Information with feedback facility), as shown in [Parts in AIS](#).

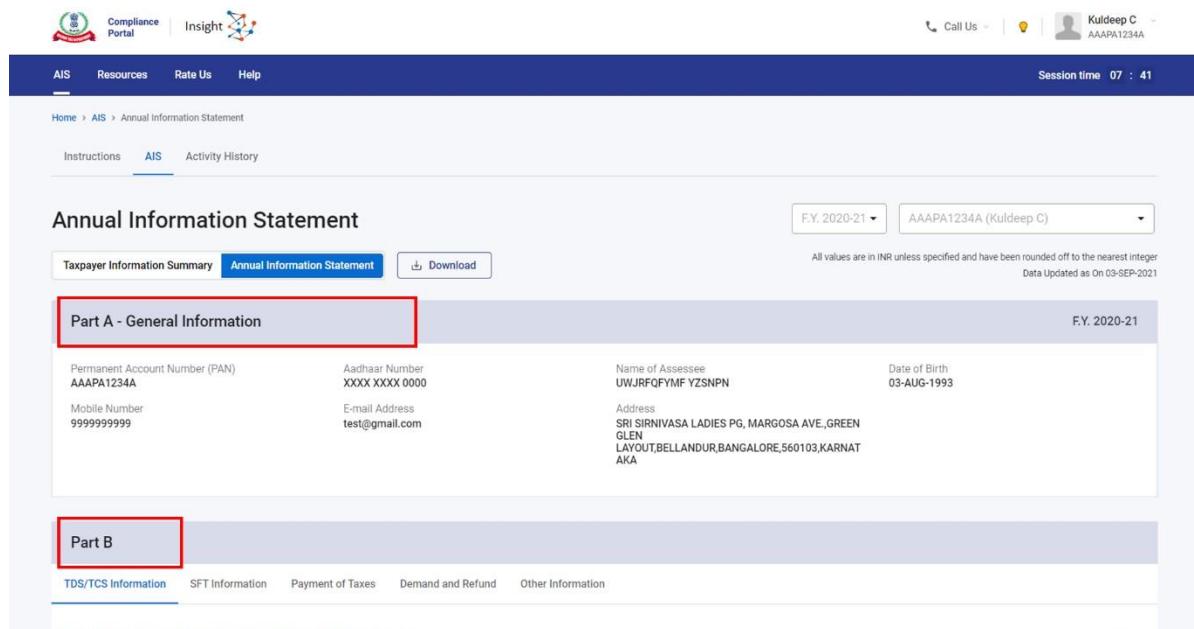


The screenshot shows the AIS homepage. At the top, there is a navigation bar with links for AIS, Resources, Rate Us, and Help. The top right corner shows session details: Session time 19 : 50, a user profile for Kuldeep C, and a PAN number AAAPA1234A. Below the navigation bar, there is a breadcrumb trail: Home > AIS. Underneath, there are three tabs: Instructions, AIS (which is selected), and Activity History. The main content area is titled 'AIS - Annual Information Statement'. It contains two main sections: 'Taxpayer Information Summary (TIS)' on the left and 'Annual Information Statement (AIS)' on the right. The 'AIS' section is highlighted with a red box. At the bottom of the page, there are links for india.gov.in, social media icons for Twitter and Facebook, and a footer with copyright information: Rate Us | Website Policies | Accessibility Statement | Site Map | Browser Support | Last reviewed and updated on: 27-OCT-2021 | Copyright © Income Tax Department, Ministry of Finance, Government of India. All Rights Reserved.

Figure 12 AIS Homepage

5.1.1 Parts in AIS

Taxpayer details and Information is displayed in AIS in the following two parts, PART A and PART B as covered below, after clicking the AIS tile from the AIS homepage.



The screenshot shows the 'Annual Information Statement' page. At the top, there are navigation links for 'AIS', 'Resources', 'Rate Us', and 'Help'. The top right corner shows the user 'Kuldeep C' (AAAPA1234A) and the session time '07 : 41'. Below the navigation, the breadcrumb path is 'Home > AIS > Annual Information Statement'. The main content area is titled 'Annual Information Statement' and contains two tabs: 'Taxpayer Information Summary' (selected) and 'Annual Information Statement'. A 'Download' button is also present. A note states: 'All values are in INR unless specified and have been rounded off to the nearest integer. Data Updated as On 03-SEP-2021'. The 'Annual Information Statement' section is divided into 'Part A - General Information' and 'Part B'. 'Part A' is highlighted with a red box and contains fields for Permanent Account Number (PAN), Aadhaar Number, Name of Assessee, Date of Birth, Mobile Number, E-mail Address, and Address. 'Part B' is also highlighted with a red box and contains tabs for 'TDS/TCS Information', 'SFT Information', 'Payment of Taxes', 'Demand and Refund', and 'Other Information'. A note at the bottom of Part B says 'Part B1- Information relating to Tax deducted/collected at source' and includes a 'Filter' icon.

Figure 13 AIS Part A and B

Part A: It displays general information pertaining to the taxpayer including PAN, Masked Aadhaar Number, Name of the Assessee, Date of Birth/ Incorporation/ Formation, mobile number, e-mail address and address of Taxpayer.

Part B: It displays the following information with respect to your AIS as shown below:

- **TDS/TCS Information:** Information related to tax deducted/collected at source will be displayed here. The Information code of the TDS/TCS, Information description and Information value are visible to the user.
- **SFT Information:** Information received from reporting entities under Specified Financial Transaction (SFT) are displayed here. The SFT code, Information description and Information value are visible.
- **Payment of Taxes:** Information relating to payment of taxes from different heads are displayed here. For example, Advance Tax, Self-Assessment Tax paid through challan to Bank.
- **Demand and Refund:** Details of the demand raised (AY, demand under section, amount and demand status) and refund initiated (AY and amount) to them during a Financial year can be viewed from here. (Details related to Demand will be released soon)
- **Other Information:** Any other information in relation to sub-rule (2) of rule 114-I is displayed here.

The detailed view of AIS i.e. the descriptive information in PART B can also be viewed by the user. (Refer [View AIS Details](#))

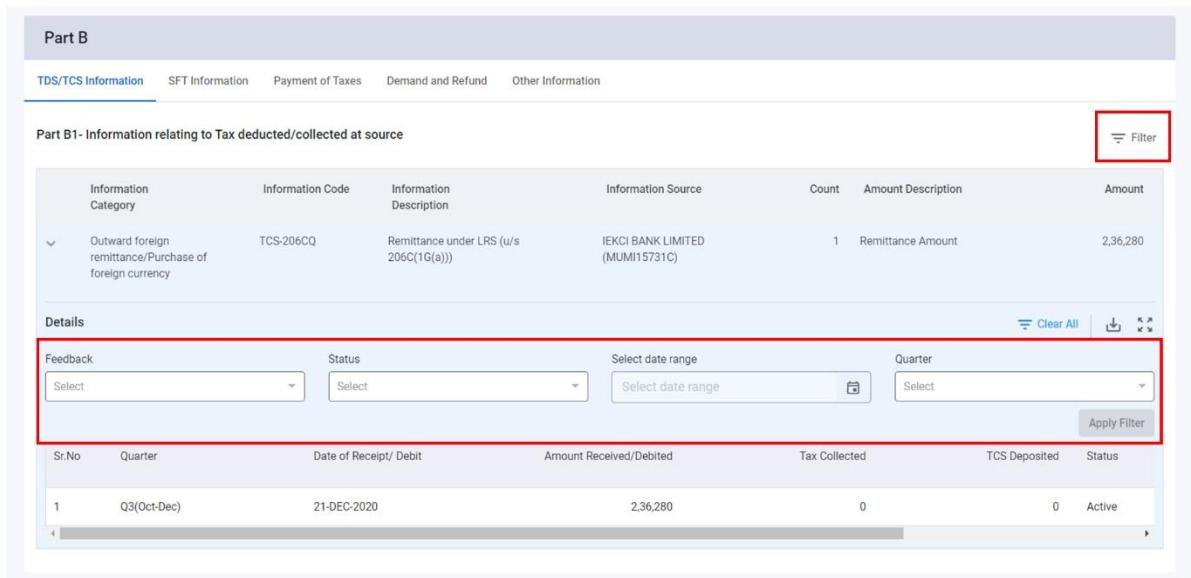
5.1.2 Icons

Certain icons can be seen on the AIS screen. The following table shows the description of the icons used here.

Icons	Description
	Expand the details
	Download the AIS related files in available formats
	Upload the AIS Feedback file
	Collapsed View (Click to see less information)
	Expanded View (Click to expand the information visible)

5.1.3 Filters

Relevant filters are available (both at [L2 Level Information](#) and at [L1 Level Information](#)) on AIS view which will help the user to filter the data and view specific information as required.



The screenshot shows the 'Part B' section of the AIS portal. At the top, there are tabs for 'TDS/TCS Information', 'SFT Information', 'Payment of Taxes', 'Demand and Refund', and 'Other Information'. The 'TDS/TCS Information' tab is selected. Below the tabs, a table displays 'Information relating to Tax deducted/collected at source'. The table has columns for 'Information Category', 'Information Code', 'Information Description', 'Information Source', 'Count', 'Amount Description', and 'Amount'. One row is visible, showing 'Outward foreign remittance/Purchase of foreign currency' as the category, 'TCS-206CQ' as the code, 'Remittance under LRS (u/s 206C(1G(a)))' as the description, 'IEKCI BANK LIMITED (MUMI15731C)' as the source, a count of 1, 'Remittance Amount' as the description, and an amount of 2,36,280. To the right of the table is a 'Filter' button. Below the table, there is a 'Details' section with a 'Feedback' dropdown menu, a 'Status' dropdown, a 'Select date range' input, a 'Quarter' dropdown, and an 'Apply Filter' button. At the bottom, there is a table with columns 'Sr.No', 'Quarter', 'Date of Receipt/ Debit', 'Amount Received/Debited', 'Tax Collected', 'TCS Deposited', and 'Status'. One row is shown with values 1, Q3(Oct-Dec), 21-DEC-2020, 2,36,280, 0, 0, and Active.

Figure 14 Filters in AIS

5.2 View AIS Details

In AIS Details, user will be able to view the [L2 Level Information](#) (information source-wise aggregated details) and [L1 Level Information](#) (information/ transaction details).

Part B						
TDS/TCS Information		SFT Information		Payment of Taxes		
Demand and Refund		Other Information				
Part B1-Information relating to tax deducted or collected at source						
Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	CCPARA BANK (MUMC259800)	107	Amount Paid/Credited	5,16,59,681
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BCPIK OF BARODA (MUMB23844C)	10	Amount Paid/Credited	78,10,800
Details						
Sr No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited	Status
1	Q3(Oct-Dec)	01-OCT-2020	19,829	1,487	1,487	Active
2	Q3(Oct-Dec)	01-OCT-2020	13,093	1,049	1,049	Active
3	Q3(Oct-Dec)	26-OCT-2020	53,912	4,043	4,043	Active
4	AVAILABILITY	31-DEC-2020	9,619	9,619	9,619	Active

Figure 15 AIS Part B – Details

5.2.1 Information/ Transaction Details (L1 Level Information)

L1 Level Information is the lowest level of information displayed in Annual Information Statement (AIS). Each information is displayed by unique Transaction sequence number (TSN). User can navigate to L1 Level Information of respective information category by clicking on the **expand icon** (Refer [Icons](#)) to check details of any information/ transaction.

The following are the key points of L1 Level Information:

- All information relating to the information code and information source (for specific L2 level information) will be displayed.
- User can see specific information as per requirement by using filters.
- Details like (Quarter, Date of transaction, relevant amount, Transaction status and Feedback as provided) is visible in this view.
- Transaction status will define whether the information is active/ inactive. Inactive means, the information is either deleted/ corrected by the information source.
- User can submit feedback (on single information and bulk mode) on the specific information through this view. Based on the feedback provided the modified value for the information will be displayed in this view (Refer [Submit Feedback](#))
- User can download the CSV of L1 level information also through the download icon provided. (Refer [Download AIS](#))

Note: If the user is yet to give feedback on any information, term “Optional” will be displayed in the “Feedback” column. The relevant feedback value will be displayed if feedback is already provided.

5.2.2 Information Source wise aggregated details (L2 Level Information)

L2 Level Information is the source wise aggregated value displayed in Annual Information Statement (AIS) as well as Taxpayer Information Summary (TIS). L2 level information shows the information category and information description based of various information sources.

- Once the user navigates to any part of AIS, L2 level information will be displayed along with relevant details (Category, Code, description and information source).
- The reported amount from the active information source in the defined information code/ description will also be visible.
- The count (corresponding to specific active L2 Level information) displays the total number of L1 level information. User can view the details of L1 level information by clicking on the **expand icon** (Refer [Icons](#)) for any specific L2 level information.

5.3 Download AIS

Facility to download the AIS and related documents is also available. Following are the files which can be downloaded for AIS:

- AIS- PDF:** Providing AIS (all parts and information) in PDF format
- AIS-JSON:** Providing AIS (all parts and information) in JSON format. This will be used for viewing and providing feedback through AIS Utility.
- Consolidated Feedback (PDF):** Providing details of the feedback submitted on relevant AIS information.
- AIS-CSV (of [L1 information](#)):** Providing specific information in CSV format.

Note: If the file size is large, the download request will be submitted, and the user can download the same through activity history tab once the file is available for download. (Refer [Download files from Activity History](#).)

Download AIS and Consolidated Feedback

Step 1: User can download AIS by clicking on the download icon from AIS View. Alternatively, the user can download the same files from the Download dropdown, available in the AIS View.

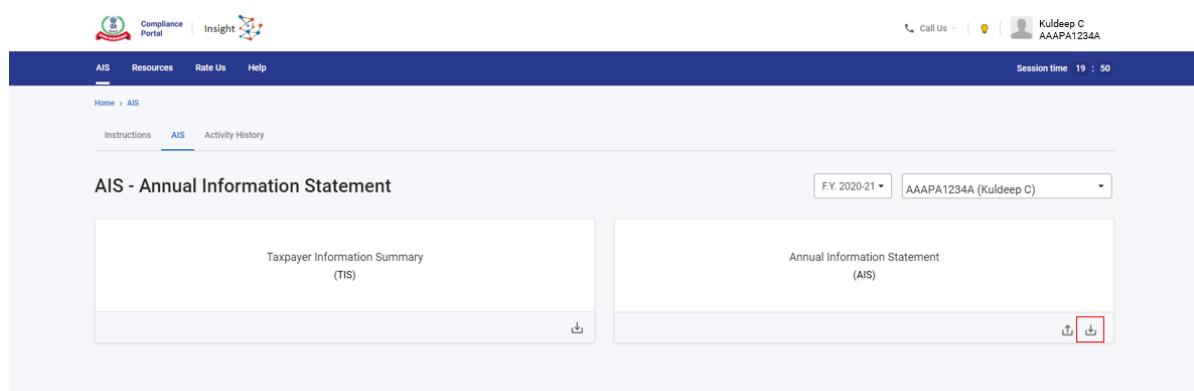


Figure 16 AIS download from AIS tile

Step 2: Select the relevant file format (PDF, JSON) in which the user wishes to download AIS. User can also download their Consolidated Feedback (Refer [Download Consolidated Feedback](#)). Click on “Download” button.

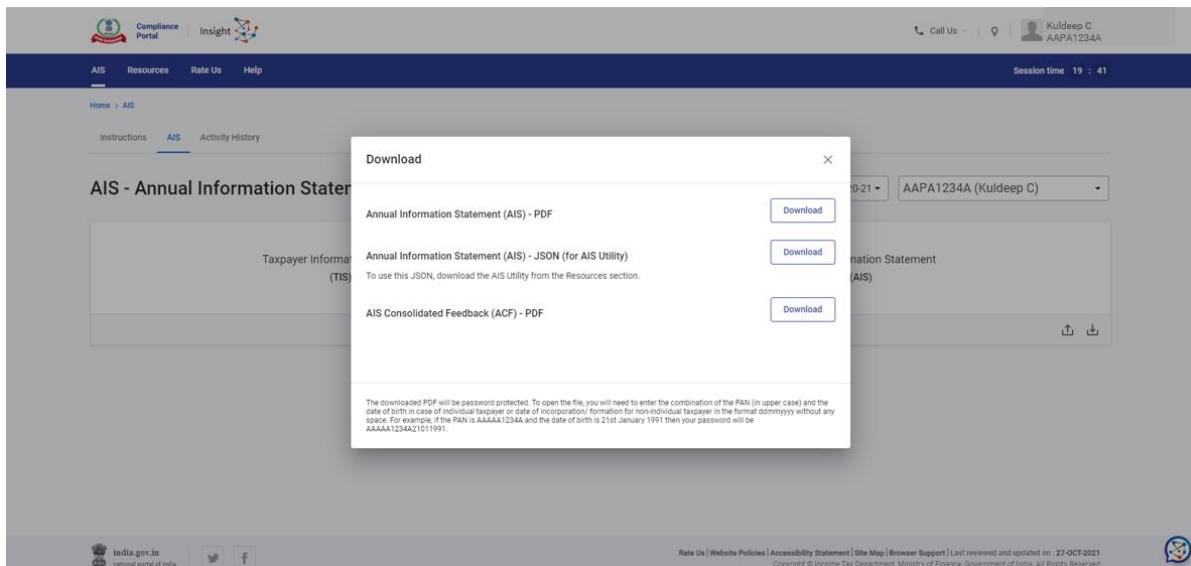


Figure 17 AIS download through AIS tile

Note: If the file size is large, the download request will be submitted, and the user can download the same through activity history tab once the file is available for download. (Refer [Download files from Activity History](#))

Note: The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation/ formation for non-individual taxpayer in the format ddmm/yyyy without any space. For example, if the PAN is AAAAA1234A and the date of birth is 21st January 1991 then your password will be AAAAA1234A21011991.

Alternatively, the user can download the same files from the Download dropdown, available in the AIS View.

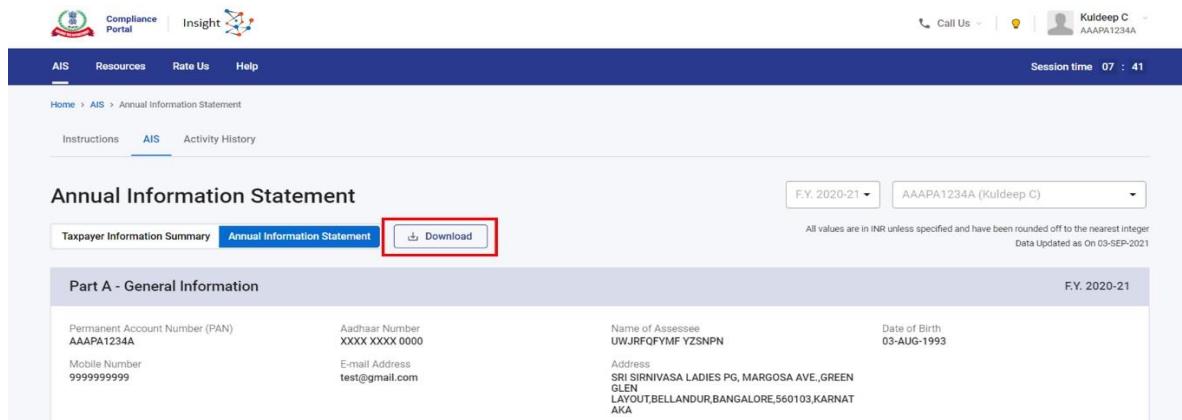


Figure 18 AIS download through AIS dropdown

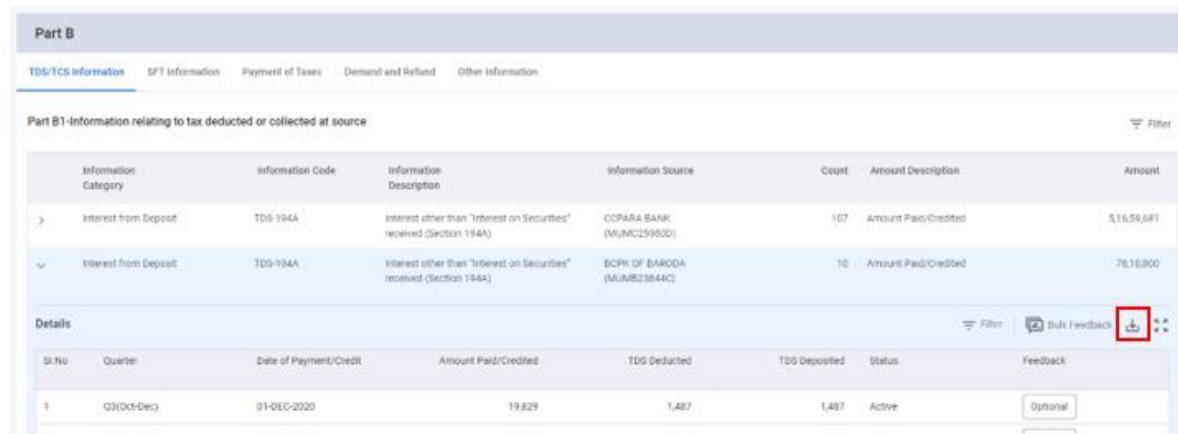
Download CSV of L1 level information

User can also download the relevant information ([L1 level information](#)) in CSV format using the following steps:

Step 1: Navigate to AIS details (Refer [View AIS Details](#)) and view [L2 level information](#).

Step 2: Expand specific [L2 level information](#) to view [L1 level information](#) on which feedback is to be provided.

Step 3: Click on the download icon which is displayed in the AIS Details and download the CSV file.



Part B								
TDS/TCS Information	SFT Information	Payment of Taxes	Demand and Refund	Other Information				
Part B1-Information relating to tax deducted or collected at source								
Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount		
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	COPARA BANK (MUMC25990D)	107	Amount Paid/Credited	51,658.081		
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BCPI OF BARODA (MUMB33944C)	10	Amount Paid/Credited	78,310.800		
Details								
Sl.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited	Status		
1	Q3(Oct-Dec)	01-DEC-2020	19,829	1,487	1,487	Active		
						<input type="button" value="Optional"/>		

Figure 19 AIS download from AIS Details view

Note: If the file size is large, the download request will be submitted, and the user can download the same through activity history tab once the file is available for download. Refer ([Download files from Activity History](#))

5.4 Submit Feedback

User can provide feedback on the active information displayed under TDS/TCS Information, SFT Information or Other information parts. Option to submit feedback on a single information, submit feedback in bulk mode, modify the feedback (to be released soon), view feedback history and download the consolidated feedback is available to the user. The feedback functionality is discussed in detail below.

5.4.1 Submit feedback on single information

User can submit the feedback on each Information displayed in AIS details. User can click and select one of the available options for submitting feedback by following the given steps:

Step 1: Navigate to AIS details (Refer [View AIS Details](#)) and view [L2 level information](#).

Step 2: Expand specific [L2 level information](#) to view [L1 level information](#) on which feedback is to be provided

Step 3: Click on “Optional” mentioned in the Feedback column for relevant information.

Part B						
TDS/TCS Information		SFT Information		Payment of Taxes		
Demand and Refund		Other Information				
Part B1-Information relating to tax deducted or collected at source						
Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
Interest from Deposit	TDS-194A	Interest other than “Interest on Securities” received (Section 194A)	CCPARA BANK (MUMC259900)	107	Amount Paid/Credited	5,16,59,681
Interest from Deposit	TDS-194A	Interest other than “Interest on Securities” received (Section 194A)	BCPK OF BARODA (MUMB23844C)	10	Amount Paid/Credited	78,10,800
Details						
Sr.No.	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited	Status
1	Q3(Oct-Dec)	01-DEC-2020	19,829	1,487	1,487	Active
2	Q3(Oct-Dec)	01-DEC-2020	13,993	1,049	1,049	Active
3	Q3(Oct-Dec)	26-OCT-2020	53,912	4,043	4,043	Active
4	Q3(Oct-Dec)	26-OCT-2020	28,034	2,103	2,103	Active

Figure 20 AIS Feedback

Step 4: In the Add Feedback screen, choose the relevant feedback option and enter the feedback details (dependent on feedback option).

Add Feedback

Information Category Interest from Deposit	Information Code TDS-194A	Information Description Interest other than “Interest on Securities” received (Section 194A)	Information Source BCPK OF BARODA (MUMB23844C)
Information Details			
TSN 131200752632260	Quarter Q3(Oct-Dec)	Date of Payment/Credit 01-DEC-2020	Amount Paid/Credited 19,829
TDS Deducted 1,487	TDS Deposited 1,487		
Choose Feedback Type:	<div style="border: 1px solid #ccc; padding: 5px; width: 300px;"> Select <ul style="list-style-type: none"> Information is correct Information is not fully correct Information relates to other PAN/ Year Information is duplicate/ included in other information Information is denied </div>		

Figure 21 AIS Feedback Type

Feedback options are as follows:

Information is correct - If the information belongs to taxpayer and all the attributes of the Information are correct.

Information is not fully correct - If the information belongs to taxpayer, but all the attributes of the Information are not correct. Upon selecting this option, relevant information fields will be displayed, and user will be able to update correct information details. e.g.- Account number, Information value, etc.

The Information relates to other PAN/year - If the taxpayer is aware of the Information, but it belongs to other PAN or other year e.g. joint ownership of property or receiving of amount mentioned in another year.

Information is duplicate/included in other information - If the information displayed is already included in any other information or it may be a duplicate information.

Information is denied - If the taxpayer completely denies the information displayed.

Customized feedback - The feedback option will be displayed based on the information category. Refer [Annexure](#) for customized feedback options relating to each information category)

Note: In case of feedback option 'Information relates to other PAN/Year',

- If 'Other Person' is selected from the dropdown of field 'Self/Other Person' then User cannot enter Self PAN
- If the 'Relationship of other person' is selected as 'Legal Entity' then User cannot enter individual PAN
- If the 'Relationship of other person' is selected as Parent/ Son/ Daughter/ Brother/ Sister/ Spouse/ Relative/ Friend, then User can only enter individual PAN
- If user is logged in with a PAN other than individual, then 'Relationship of other person' will not be enabled
- User can only enter Feedback amount equal to, or less than the Reported value

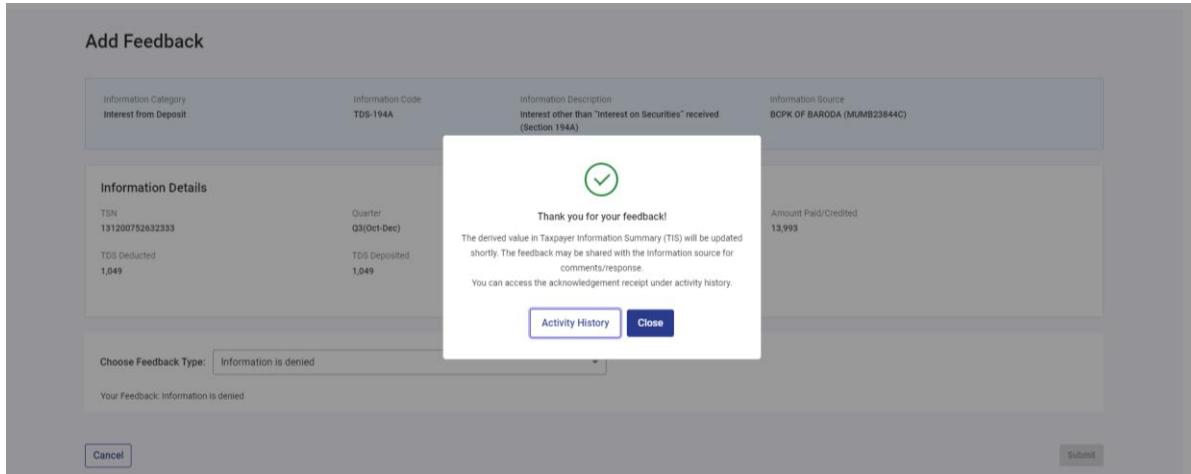
Step 5: Click “Submit” to submit the feedback.

Add Feedback

Information Category Interest from Deposit	Information Code TDS-194A	Information Description Interest other than "Interest on Securities" received (Section 194A)	Information Source BCPK OF BARODA (MUMB2384C)
Information Details			
TSN 131200752632333	Quarter Q3(Oct-Dec)	Date of Payment/Credit 01-DEC-2020	Amount Paid/Credited 13,993
TDS Deducted 1,049	TDS Deposited 1,049		
Choose Feedback Type: <input type="button" value="Information is denied"/>			
Your Feedback: Information is denied			
<input type="button" value="Cancel"/>	<input style="border: 2px solid red;" type="button" value="Submit"/>		

Figure 22 Submit AIS Feedback

Step 6: Success message will be shown for the successful submission of feedback. The acknowledgement receipt of the same can be downloaded from the activity history. Refer [\(Download files from Activity History\)](#)



The screenshot shows the 'Add Feedback' page. At the top, there are four columns: 'Information Category' (Interest from Deposit), 'Information Code' (TDS-194A), 'Information Description' (Interest other than "Interest on Securities" received (Section 194A)), and 'Information Source' (BCPK OF BARODA (MUMB23844C)). Below this is a 'Information Details' section with TIN (131200752632333), Quarter (Q3(Oct-Dec)), TDS Deposited (1,049), and Amount Paid/Credited (13,993). A central modal window displays a green checkmark and the message: 'Thank you for your feedback! The derived value in Taxpayer Information Summary (TIS) will be updated shortly. The feedback may be shared with the information source for comments/response. You can access the acknowledgement receipt under activity history.' It has 'Activity History' and 'Close' buttons. At the bottom, there's a 'Choose Feedback Type' dropdown set to 'Information is denied', a note 'Your Feedback: Information is denied', and 'Cancel' and 'Submit' buttons.

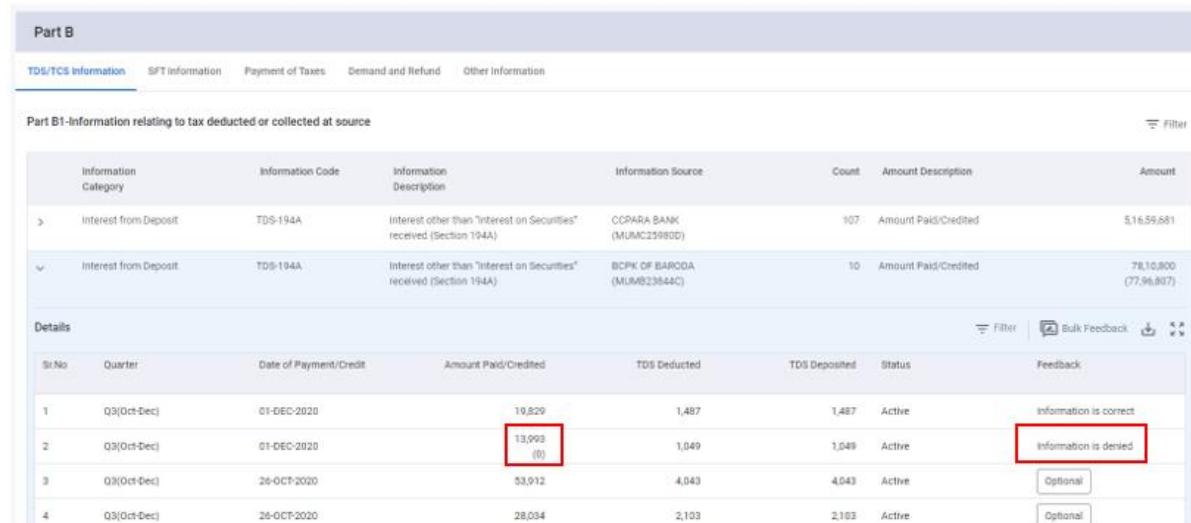
Figure 23 AIS Feedback submitted successfully

Modified information value as per feedback submitted:

Once the feedback is submitted successfully, modified value of information ([L1 level](#)) will be displayed with the reported value as per the feedback submitted by the user. The modified value will be calculated according to the feedback type selected and the feedback details.

The modified value of the information at [L1 level](#) will also be aggregated and displayed at information source ([L2 level](#)) data. The same will also be utilised to update the TIS view.

Refer [Illustrations displaying the logic for calculation of values in TIS](#)



The screenshot shows the 'Part B' section with tabs for 'TDS/TCS Information', 'SFT Information', 'Payment of Taxes', 'Demand and Refund', and 'Other Information'. Under 'TDS/TCS Information', there's a table for 'Part B1-Information relating to tax deducted or collected at source'. It shows two rows: one for 'Interest from Deposit' (Information Category: TDS-194A, Description: Interest other than "Interest on Securities" received (Section 194A), Source: CCPARA BANK (MUMB23980D), Count: 107, Amount: 5,165,681) and another for the same category (Source: BCPK OF BARODA (MUMB23844C), Count: 10, Amount: 78,10,800 (77,96,807)). Below this is a 'Details' table with columns: Sir.No, Quarter, Date of Payment/Credit, Amount Paid/Credited, TDS Deducted, TDS Deposited, Status, and Feedback. The 'Amount Paid/Credited' column shows values: 10,829, 13,993 (with a red box around it), 53,912, and 28,034. The 'Feedback' column shows 'Information is correct' (for the first row), 'Information is denied' (for the second row), and 'Optional' (for the last two rows).

Figure 24 Modified Value in AIS Details View

5.4.2 Submit feedback through Bulk Mode

Other than providing single feedback, the user can also provide feedback on multiple L1 Level Information visible on expanding any L2 Level Information and submit the feedback in bulk mode. The following steps can be followed for the same:

Step 1: Navigate to AIS details (Refer [View AIS Details](#)) and view L2 level information.

Step 2: Expand specific L2 level information to view L1 level information.

Step 3: Select the bulk feedback option available.

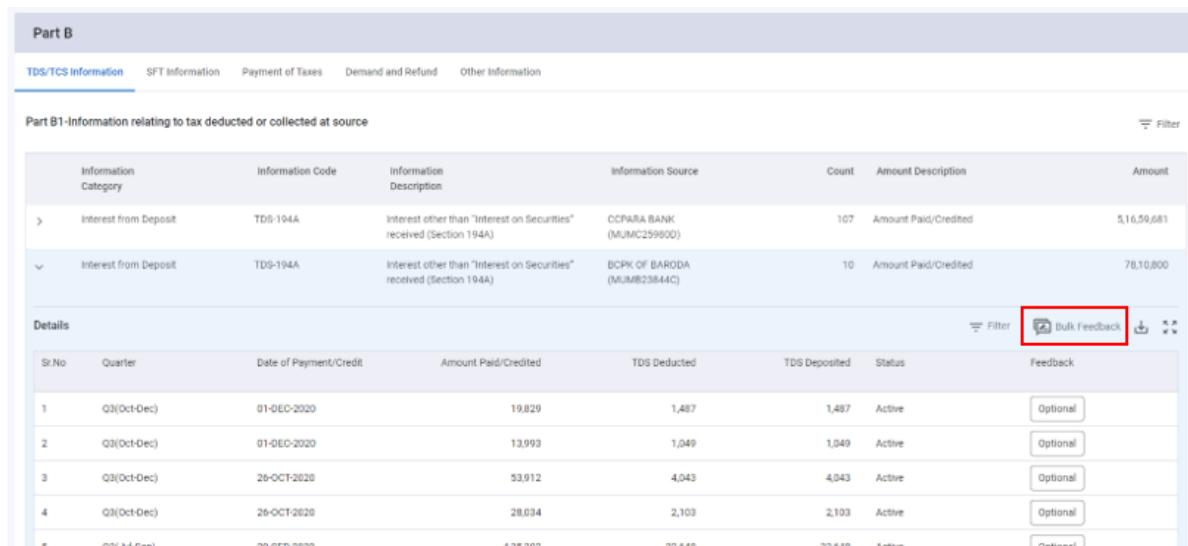


Figure 25 Bulk Feedback Link

Step 4: Bulk feedback screen is visible. Select multiple information for which the feedback is to be provided.

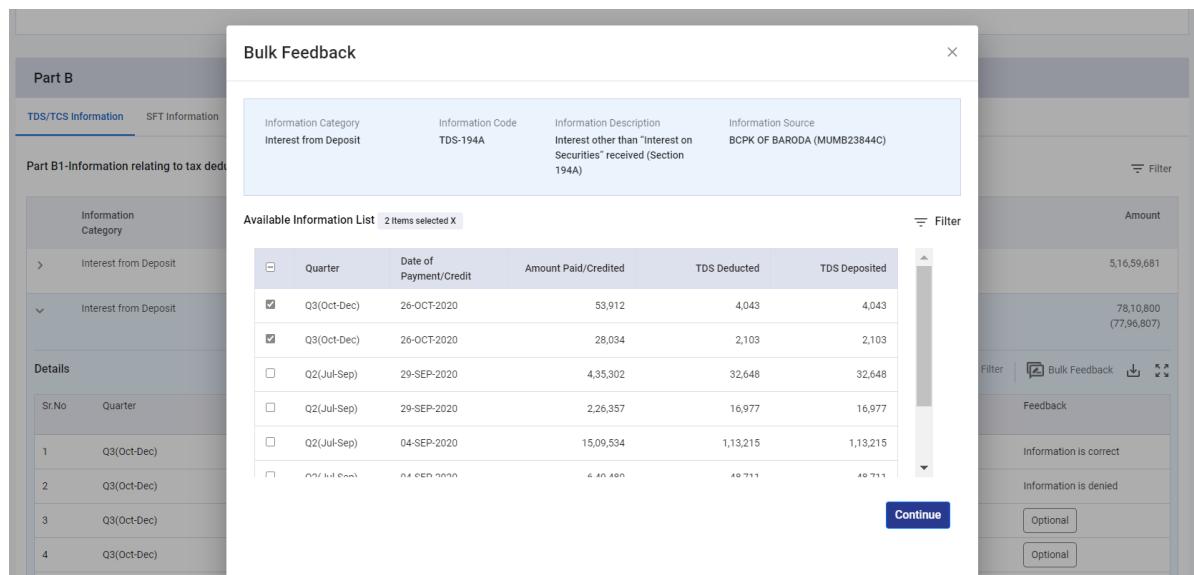


Figure 26 Bulk AIS Feedback

Step 5: Choose the relevant feedback from the given options.

Add Feedback

Information Category Interest from Deposit	Information Code TDS-194A	Information Description Interest other than "Interest on Securities" received (Section 194A)	Information Source BCPK OF BARODA (MUMB23B44C)
---	------------------------------	--	---

Information Details

Sr.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited
1	Q3(Oct-Dec)	25-OCT-2020	53,912	4,043	4,043
2	Q3(Oct-Dec)	25-OCT-2020	29,034	2,103	2,103

Choose Feedback Type: Select

Information is correct
Information relates to other PAN/ Year
Information is duplicate/ included in other information
Information is denied

Figure 27 Bulk AIS Feedback Options

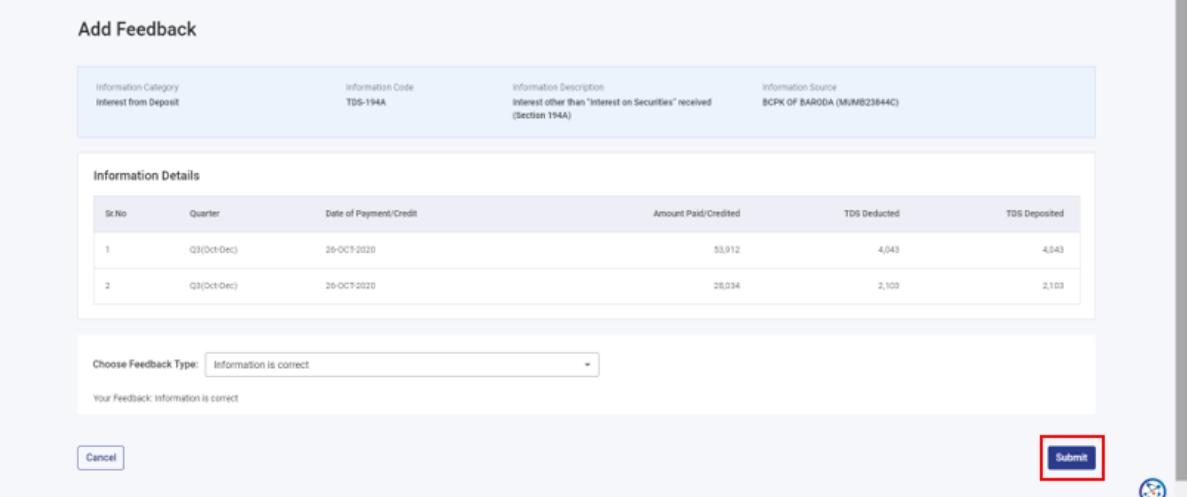
Note: Only following feedback options are available for submitting the response in bulk:

- Information is correct
- Information relates to other PAN/year
- Information is duplicate/ included in other information
- Information is denied
- Customized feedback option as per information category

Note: In case of feedback option '**Information relates to other PAN/Year**',

- If 'Other Person' is selected from the dropdown of field 'Self/Other Person' then User cannot enter Self PAN
- If the 'Relationship of other person' is selected as 'Legal Entity' then User cannot enter individual PAN
- If the 'Relationship of other person' is selected as Parent/ Son/ Daughter/ Brother/ Sister/ Spouse/ Relative/ Friend, then User can only enter individual PAN
- If user is logged in with a PAN other than individual, then 'Relationship of other person' will not be enabled
- User can only enter Feedback amount equal to, or less than the Reported value

Step 6: Submit the required response in bulk.



The screenshot shows the 'Add Feedback' page with the following details:

Information Category	Information Code	Information Description	Information Source
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BGPK OF BARODA (MUMB23844C)

Information Details

Sr.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited
1	Q3(Oct-Dec)	26-OCT-2020	53,912	4,043	4,043
2	Q3(Oct-Dec)	26-OCT-2020	28,034	2,103	2,103

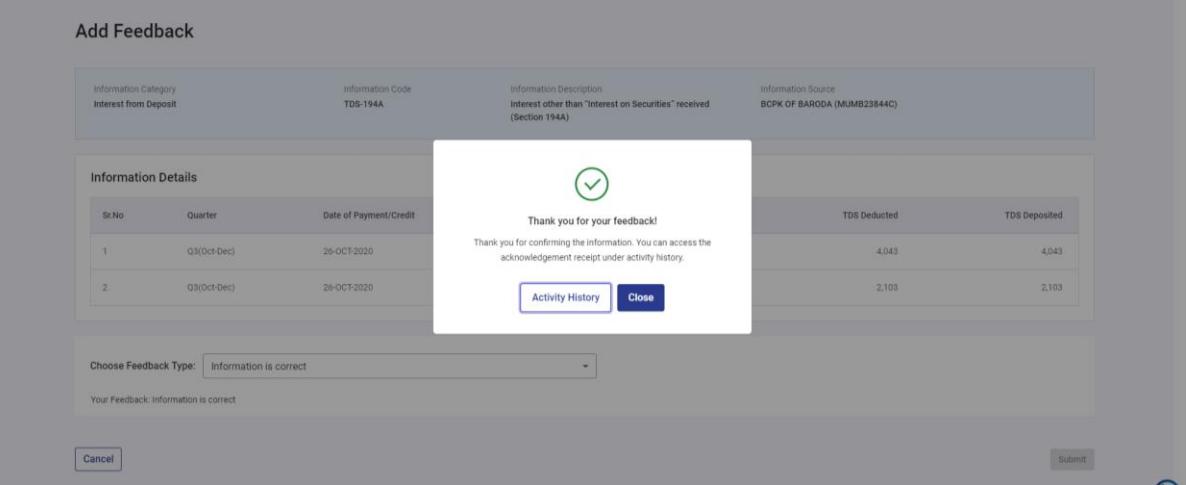
Choose Feedback Type: Information is correct

Your Feedback: Information is correct

Cancel Submit 

Figure 28 Submit AIS feedback in Bulk

Step 7: Success message will be shown for the successful submission of feedback. The acknowledgement receipt of the same can be downloaded from the activity history. Refer ([Download files from Activity History](#))



The screenshot shows the 'Add Feedback' page with the following details:

Information Category	Information Code	Information Description	Information Source
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BGPK OF BARODA (MUMB23844C)

Information Details

Sr.No	Quarter	Date of Payment/Credit	TDS Deducted	TDS Deposited
1	Q3(Oct-Dec)	26-OCT-2020	4,043	4,043
2	Q3(Oct-Dec)	26-OCT-2020	2,103	2,103

Choose Feedback Type: Information is correct

Your Feedback: Information is correct

Cancel Activity History Close 

Figure 29 Submitted Bulk Feedback

Step 8: View the feedback provided in the feedback history of relevant information.

Feedback Details: 131200752104700

Information Category Interest from Deposit	Information Code TDS-194A	Information Description Interest other than "Interest on Securities" received (Section 194A)	Information Source BCPK OF BARODA (MUMB23844C)								
Information Details <table border="1"> <tr> <td>TIN 131200752104700</td> <td>Quarter Q3(Oct-Dec)</td> <td>Date of Payment/Credit 26-OCT-2020</td> <td>Amount Paid/Credited 53,912</td> </tr> <tr> <td>TDS Deducted 4,043</td> <td>TDS Deposited 4,043</td> <td>Status Active</td> <td>Active Feedback Information is correct</td> </tr> </table>				TIN 131200752104700	Quarter Q3(Oct-Dec)	Date of Payment/Credit 26-OCT-2020	Amount Paid/Credited 53,912	TDS Deducted 4,043	TDS Deposited 4,043	Status Active	Active Feedback Information is correct
TIN 131200752104700	Quarter Q3(Oct-Dec)	Date of Payment/Credit 26-OCT-2020	Amount Paid/Credited 53,912								
TDS Deducted 4,043	TDS Deposited 4,043	Status Active	Active Feedback Information is correct								
History <table border="1"> <tr> <td>Ref. ID: 3009202114000007 Information is correct By UZSJ RFYMFN MFRQ FSI TYMJW RFSQ BTWPJW GTFWI - ACCLP1108L</td> <td>Active 30-SEP-2021, 14:31:51 * Portal</td> </tr> </table>				Ref. ID: 3009202114000007 Information is correct By UZSJ RFYMFN MFRQ FSI TYMJW RFSQ BTWPJW GTFWI - ACCLP1108L	Active 30-SEP-2021, 14:31:51 * Portal						
Ref. ID: 3009202114000007 Information is correct By UZSJ RFYMFN MFRQ FSI TYMJW RFSQ BTWPJW GTFWI - ACCLP1108L	Active 30-SEP-2021, 14:31:51 * Portal										

Figure 30 Submitted Bulk Feedback

User can also download consolidated feedback acknowledgment via Activity History. Refer ([Download files from Activity History](#))

5.4.3 Modify Feedback

Once the user has submitted the feedback on any information displayed under TDS/TCS Information, SFT Information or Other information and wants to modify it (while the information is still active), then the same can be done by following the given steps:

Step 1: Navigate to AIS details (Refer [View AIS Details](#)) and view [L2 level information](#).

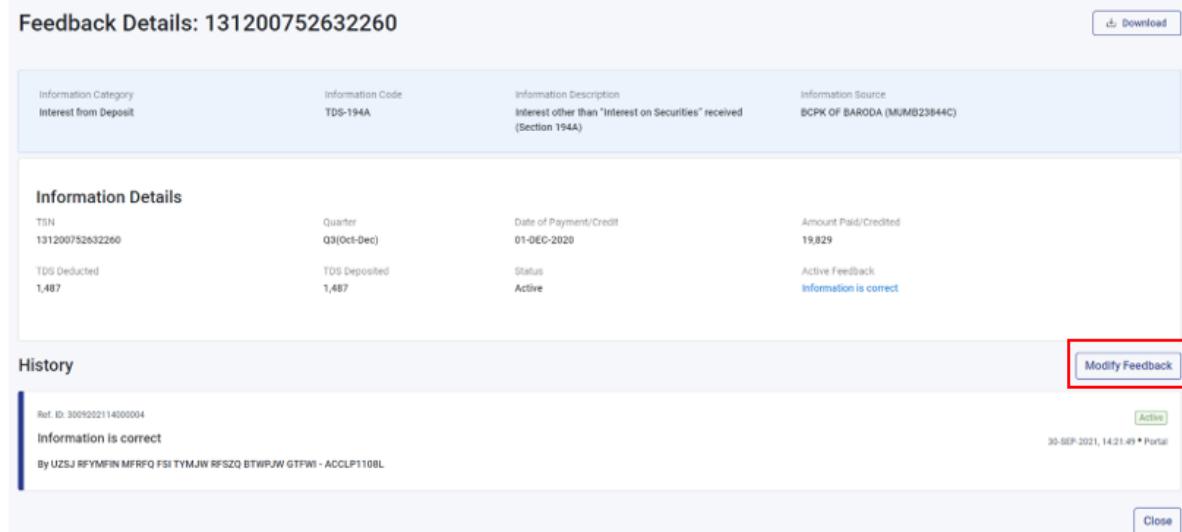
Step 2: Expand specific [L2 level information](#) to view and click on the [L1 level information](#) on the information where the feedback was already provided and needs modification.

Part B

TDS/TCS Information	SFT Information	Payment of Taxes	Demand and Refund	Other Information																																																
Part B1-Information relating to tax deducted or collected at source <table border="1"> <thead> <tr> <th>Information Category</th> <th>Information Code</th> <th>Information Description</th> <th>Information Source</th> <th>Count</th> <th>Amount Description</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>> Interest from Deposit</td> <td>TDS-194A</td> <td>Interest other than "Interest on Securities" received (Section 194A)</td> <td>CCPARA BANK (MUMC259800)</td> <td>107</td> <td>Amount Paid/Credited</td> <td>5,16,59,681</td> </tr> <tr> <td>Interest from Deposit</td> <td>TDS-194A</td> <td>Interest other than "Interest on Securities" received (Section 194A)</td> <td>BCPK OF BARODA (MUMB23844C)</td> <td>10</td> <td>Amount Paid/Credited</td> <td>78,10,800 (77,96,807)</td> </tr> </tbody> </table>					Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount	> Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	CCPARA BANK (MUMC259800)	107	Amount Paid/Credited	5,16,59,681	Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BCPK OF BARODA (MUMB23844C)	10	Amount Paid/Credited	78,10,800 (77,96,807)																											
Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount																																														
> Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	CCPARA BANK (MUMC259800)	107	Amount Paid/Credited	5,16,59,681																																														
Interest from Deposit	TDS-194A	Interest other than "Interest on Securities" received (Section 194A)	BCPK OF BARODA (MUMB23844C)	10	Amount Paid/Credited	78,10,800 (77,96,807)																																														
Details <table border="1"> <thead> <tr> <th>St.No</th> <th>Quarter</th> <th>Date of Payment/Credit</th> <th>Amount Paid/Credited</th> <th>TDS Deducted</th> <th>TDS Deposited</th> <th>Status</th> <th>Feedback</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Q3(Oct-Dec)</td> <td>01-DEC-2020</td> <td>19,829</td> <td>1,487</td> <td>1,487</td> <td>Active</td> <td>Information is correct</td> </tr> <tr> <td>2</td> <td>Q3(Oct-Dec)</td> <td>01-DEC-2020</td> <td>13,593 (0)</td> <td>1,049</td> <td>1,049</td> <td>Active</td> <td>Information is denied</td> </tr> <tr> <td>3</td> <td>Q3(Oct-Dec)</td> <td>26-OCT-2020</td> <td>53,912</td> <td>4,043</td> <td>4,043</td> <td>Active</td> <td>Information is correct</td> </tr> <tr> <td>4</td> <td>Q3(Oct-Dec)</td> <td>26-OCT-2020</td> <td>28,034</td> <td>2,103</td> <td>2,103</td> <td>Active</td> <td>Information is correct</td> </tr> <tr> <td>5</td> <td>Q2(Jul-Sep)</td> <td>29-SEP-2020</td> <td>4,35,302</td> <td>32,648</td> <td>32,648</td> <td>Active</td> <td>Optional</td> </tr> </tbody> </table>					St.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited	Status	Feedback	1	Q3(Oct-Dec)	01-DEC-2020	19,829	1,487	1,487	Active	Information is correct	2	Q3(Oct-Dec)	01-DEC-2020	13,593 (0)	1,049	1,049	Active	Information is denied	3	Q3(Oct-Dec)	26-OCT-2020	53,912	4,043	4,043	Active	Information is correct	4	Q3(Oct-Dec)	26-OCT-2020	28,034	2,103	2,103	Active	Information is correct	5	Q2(Jul-Sep)	29-SEP-2020	4,35,302	32,648	32,648	Active	Optional
St.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	TDS Deducted	TDS Deposited	Status	Feedback																																													
1	Q3(Oct-Dec)	01-DEC-2020	19,829	1,487	1,487	Active	Information is correct																																													
2	Q3(Oct-Dec)	01-DEC-2020	13,593 (0)	1,049	1,049	Active	Information is denied																																													
3	Q3(Oct-Dec)	26-OCT-2020	53,912	4,043	4,043	Active	Information is correct																																													
4	Q3(Oct-Dec)	26-OCT-2020	28,034	2,103	2,103	Active	Information is correct																																													
5	Q2(Jul-Sep)	29-SEP-2020	4,35,302	32,648	32,648	Active	Optional																																													

Figure 31 AIS Details

Step 3: User will be directed to the Feedback History screen that will show the already submitted feedback. Click on the “Modify Feedback” button.



Feedback Details: 131200752632260

Information Category: Interest from Deposit

Information Code: TDS-194A

Information Description: Interest other than "Interest on Securities" received (Section 194A)

Information Source: BCPK OF BARODA (MUMB23844C)

Information Details

TSN: 131200752632260	Quarter: Q3(Oct-Dec)	Date of Payment/Credit: 01-DEC-2020	Amount Paid/Credited: 19,829
TDS Deducted: 1,487	TDS Deposited: 1,487	Status: Active	Active Feedback: Information is correct

History

Ref. ID: 3009202114000004
Information is correct
By UZSJ RFYMFN MFRFQ FSI TYMJW RFSZQ BTWPJW GTFW - ACCLP1108L

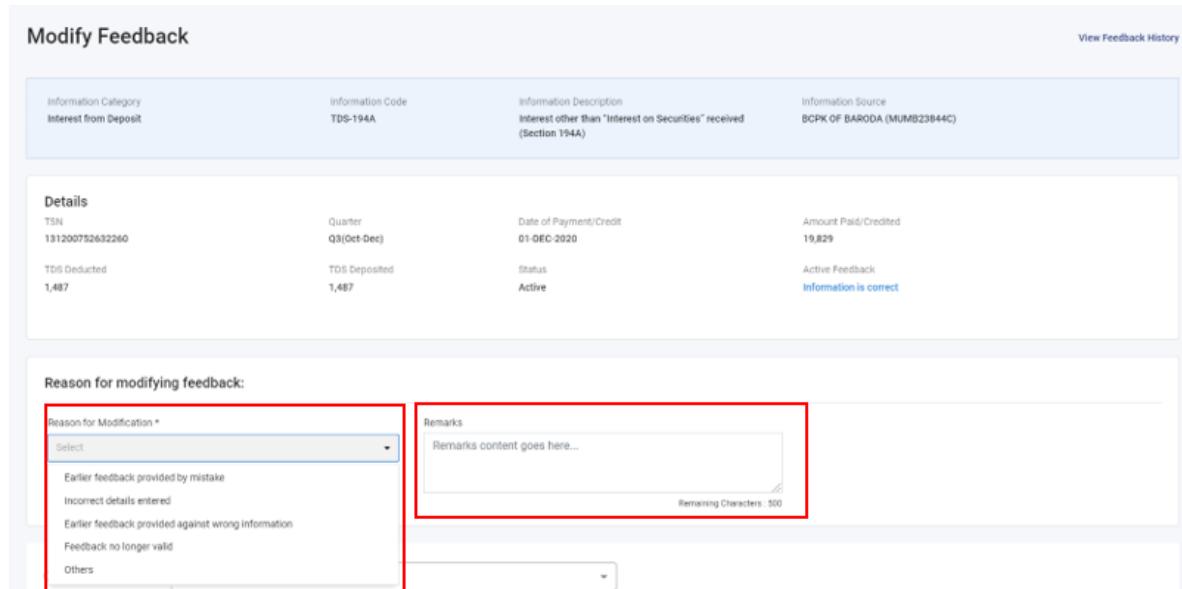
Active
30-SEP-2021, 14:21:49 • Portal

Modify Feedback

Close

Figure 32 Feedback History – Modify feedback

Step 4: Select the reason for modification along with remarks as per the requirement.



Modify Feedback

View Feedback History

Information Category: Interest from Deposit

Information Code: TDS-194A

Information Description: Interest other than "Interest on Securities" received (Section 194A)

Information Source: BCPK OF BARODA (MUMB23844C)

Details

TSN: 131200752632260	Quarter: Q3(Oct-Dec)	Date of Payment/Credit: 01-DEC-2020	Amount Paid/Credited: 19,829
TDS Deducted: 1,487	TDS Deposited: 1,487	Status: Active	Active Feedback: Information is correct

Reason for modifying feedback:

Reason for Modification *

Select

Earlier feedback provided by mistake
Incorrect details entered
Earlier feedback provided against wrong information
Feedback no longer valid
Others

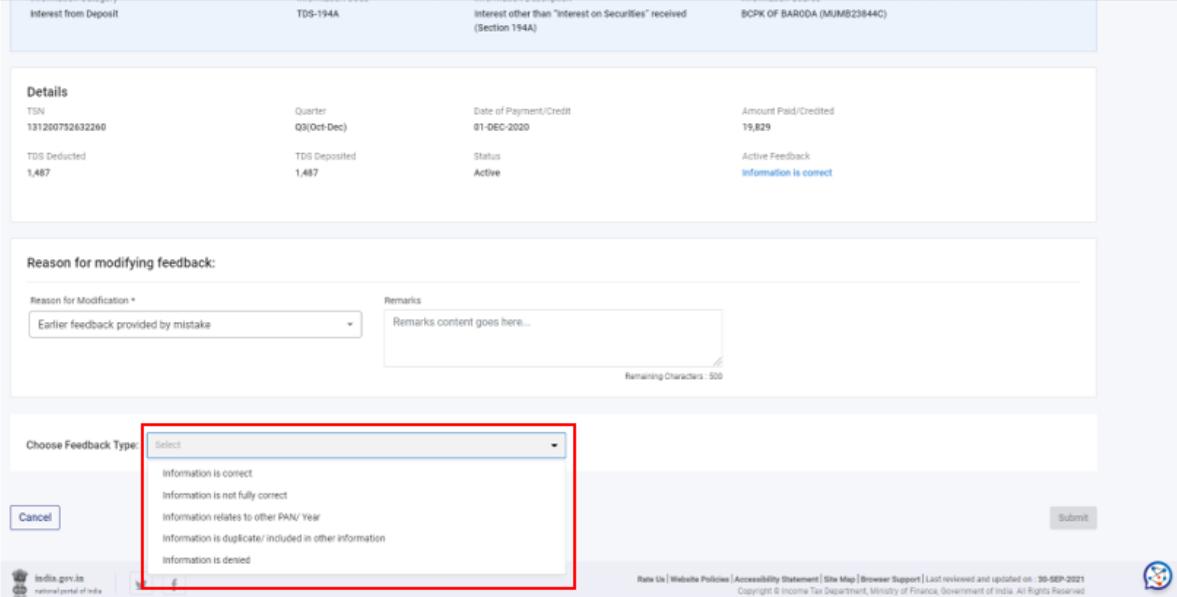
Remarks

Remarks content goes here... Remaining Characters: 500

Figure 33 Modify feedback – Reason and Remarks

Note: If the reason for modification is selected as “Others”, then the Remarks field would be mandatory.

Step 5: Choose the relevant feedback from the given options, enter the details and click on the “Submit” button.



Interest from Deposit TDS-194A Interest other than "Interest on Securities" received (Section 194A) BCPK OF BARODA (MUMB23844C)

Details

TSN 131200752632260	Quarter Q3(Oct-Dec)	Date of Payment/Credit 01-DEC-2020	Amount Paid/Credited 19,829
TDS Deducted 1,487	TDS Deposited 1,487	Status Active	Active Feedback Information is correct

Reason for modifying feedback:

Reason for Modification * Earlier feedback provided by mistake	Remarks Remarks content goes here...
---	---

Remaining Characters : 500

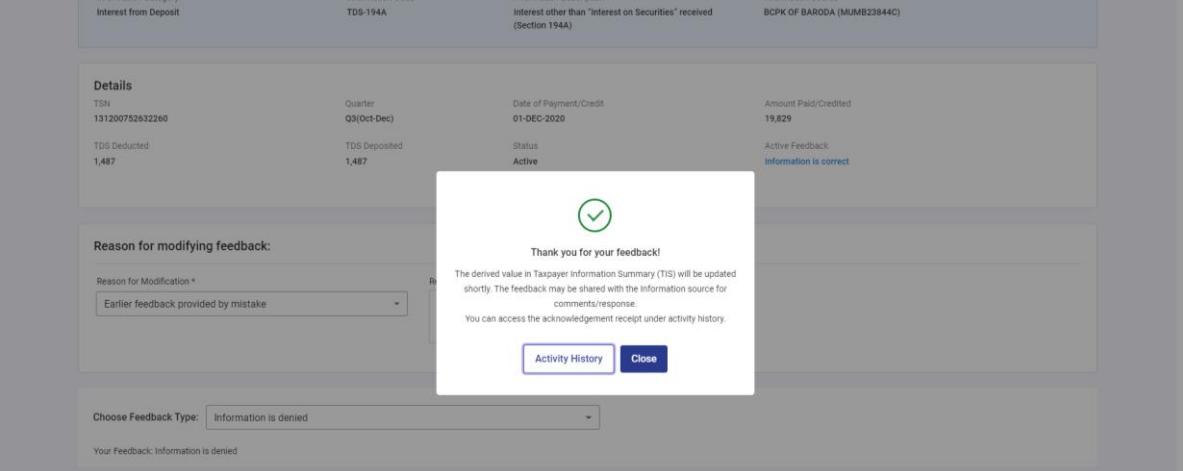
Choose Feedback Type:

Information is correct
Information is not fully correct
Information relates to other PAN/ Year
Information is duplicate/included in other information
Information is denied

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Figure 34 Submit modified feedback

Step 6: Success message will be shown for the successful submission of feedback. The acknowledgement receipt of the same can be downloaded from the activity history. (Refer [Download files from Activity History](#))



Interest from Deposit TDS-194A Interest other than "Interest on Securities" received (Section 194A) BCPK OF BARODA (MUMB23844C)

Details

TSN 131200752632260	Quarter Q3(Oct-Dec)	Date of Payment/Credit 01-DEC-2020	Amount Paid/Credited 19,829
TDS Deducted 1,487	TDS Deposited 1,487	Status Active	Active Feedback Information is correct

Reason for modifying feedback:

Reason for Modification * Earlier feedback provided by mistake

Choose Feedback Type:

Your Feedback: Information is denied

Figure 35 Successful submission of modified feedback

Modified information value as per modified feedback submitted:

Once the modified feedback is submitted successfully, the modified value of information ([L1 level](#)) will be displayed with the reported value as per the feedback submitted by the user. The modified value will be calculated according to the feedback type selected and the feedback details.

The modified value of the information at [L1 level](#) will also be aggregated and displayed at information source ([L2 level](#)) data. The same will also be utilised to update the TIS view.

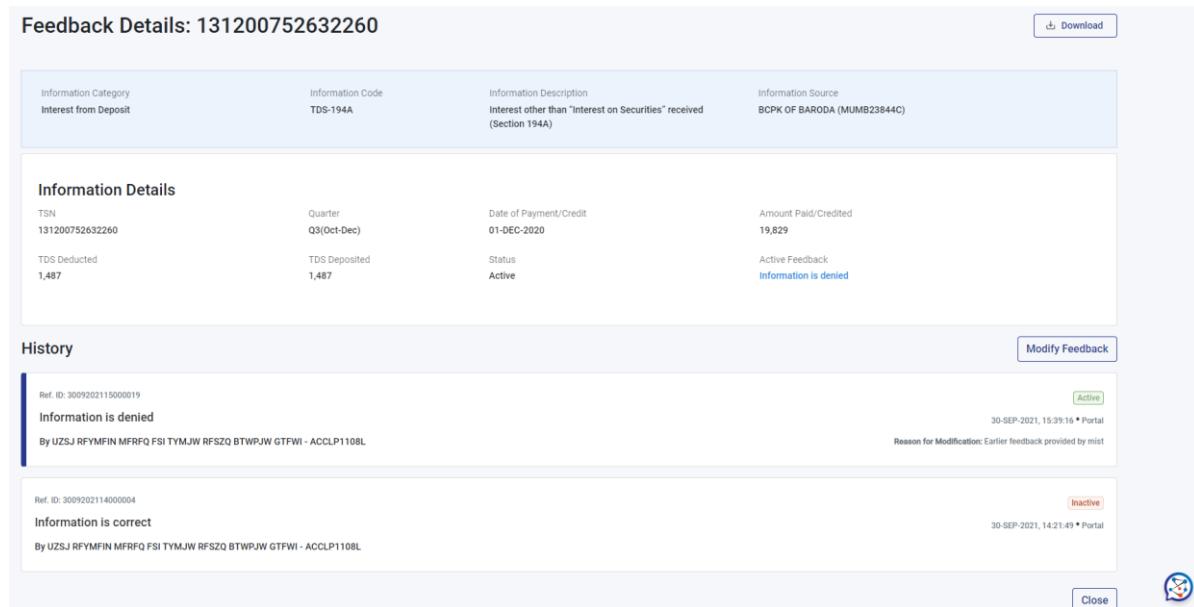
5.4.4 View Feedback History

Feedback history will display the details of feedback(s), submitted on the specific information. User can navigate to this screen through:

Step 1: Navigate to AIS details (Refer [View AIS Details](#)) and view [L2 level information](#).

Step 2: Expand specific L2 level information to view [L1 level information](#).

Step 3: User can navigate to Feedback history page to view the entire history of the feedback provided on that information.



The screenshot shows the 'Feedback Details' page for feedback ID 131200752632260. It includes sections for 'Information Details' and 'History'. The 'History' section displays two entries:

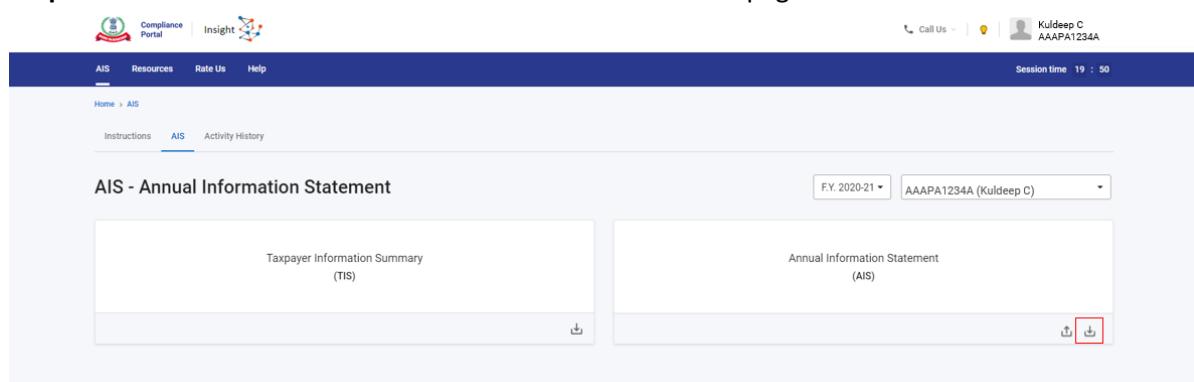
- Information is denied** (Active, 30-SEP-2021, 15:39:16 • Portal):
Ref. ID: 3009202115000019
Information is denied
By UZSJ RFYMFN MFRFQ FSI TYMJW RFSQ BTWPJW GTFWI - ACCLP1108L
- Information is correct** (Inactive, 30-SEP-2021, 14:23:49 • Portal):
Ref. ID: 3009202114000004
Information is correct
By UZSJ RFYMFN MFRFQ FSI TYMJW RFSQ BTWPJW GTFWI - ACCLP1108L

Figure 36 Feedback History

5.4.5 Download Consolidated Feedback

After submitting the feedback of the Annual Information Statement (AIS), user can download the AIS consolidated feedback file (PDF). It will help them to view all their AIS feedback (other than feedback, 'Information is correct') related information in one pdf for easy understanding.

Step 1: Click on the download icon on the AIS tile in AIS Homepage.



The screenshot shows the AIS homepage. The 'AIS' tile is selected, and two download icons are visible on the right side of the tile.

Figure 37 AIS Homepage

Alternatively, the user can download the same files from the Download dropdown, available in the AIS View.

Step 2: Click on the “Download” button in front of Consolidated Feedback (AIS) – PDF.

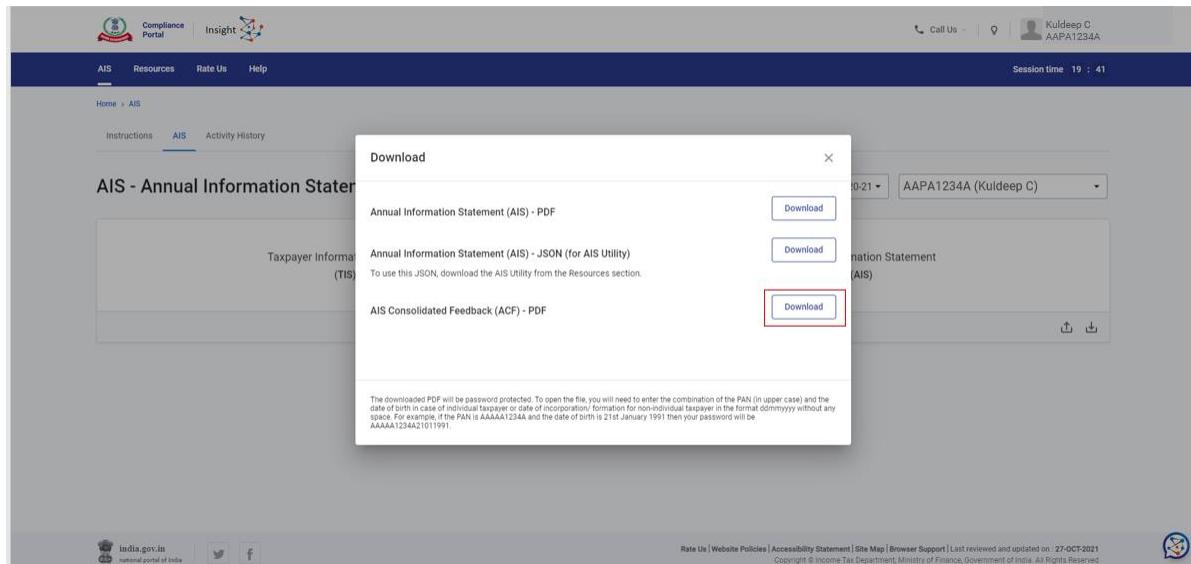


Figure 38 Download Consolidated Feedback

Note: If the file size is large, the download request will be initiated, and the link will be made available in activity history tab once the file is ready for download. Refer ([Download files from Activity History](#))

Note: The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation/ formation for non-individual taxpayer in the format ddmm/yyyy without any space. For example, if the PAN is AAAA1234A and the date of birth is 21st January 1991 then your password will be AAAA1234A21011991.

6 Taxpayer Information Summary (TIS)

Taxpayer Information Summary (TIS) is an information category wise aggregated information summary for a taxpayer. It shows processed value (i.e., value generated after processing of information through pre-defined rules) and derived value (i.e., value derived after considering the taxpayer feedback and processed value) under each information category (e.g., Salaries, Interest, Dividend etc.). The derived information in TIS will be used for prefilling of Return.

6.1 View TIS

After accessing the AIS homepage, user can view the TIS through following steps:

- Step 1:** Select relevant Financial Year and PAN for which TIS is to be viewed.
- Step 2:** Click on **Taxpayer Information Summary (TIS)** tile to view your TIS details.

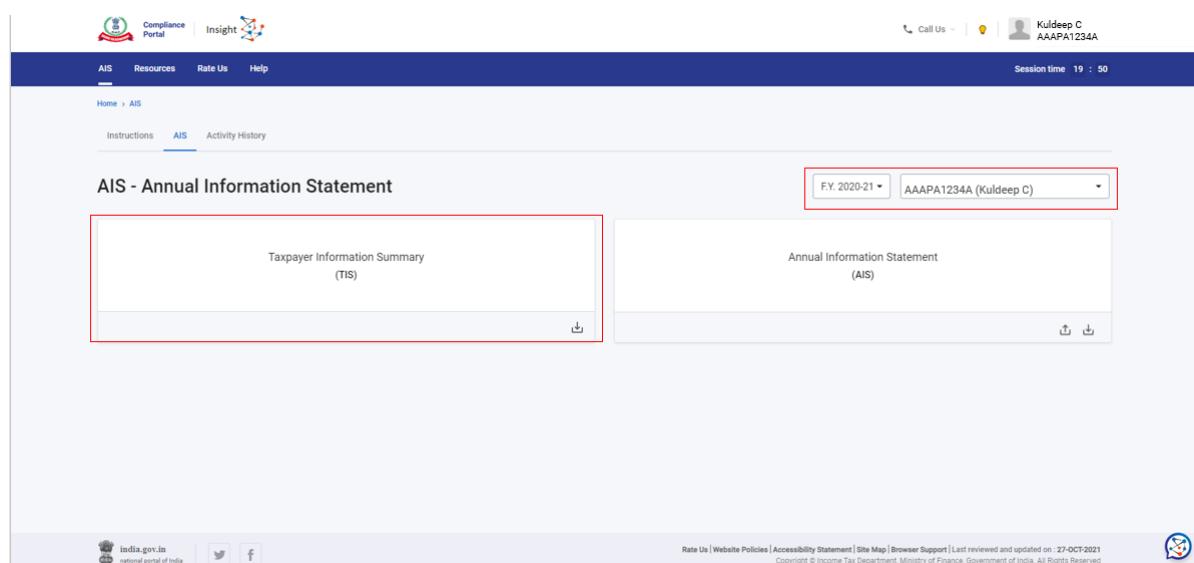
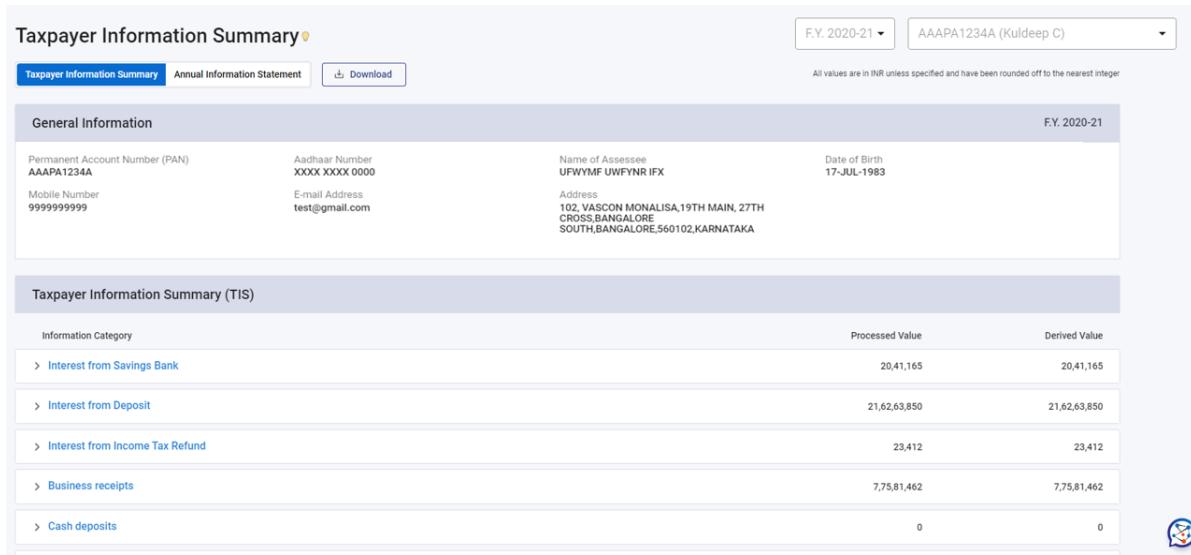


Figure 39 AIS Homepage

Step 3: Navigate to TIS page showing parts and relevant information as shown in [Parts in TIS](#).



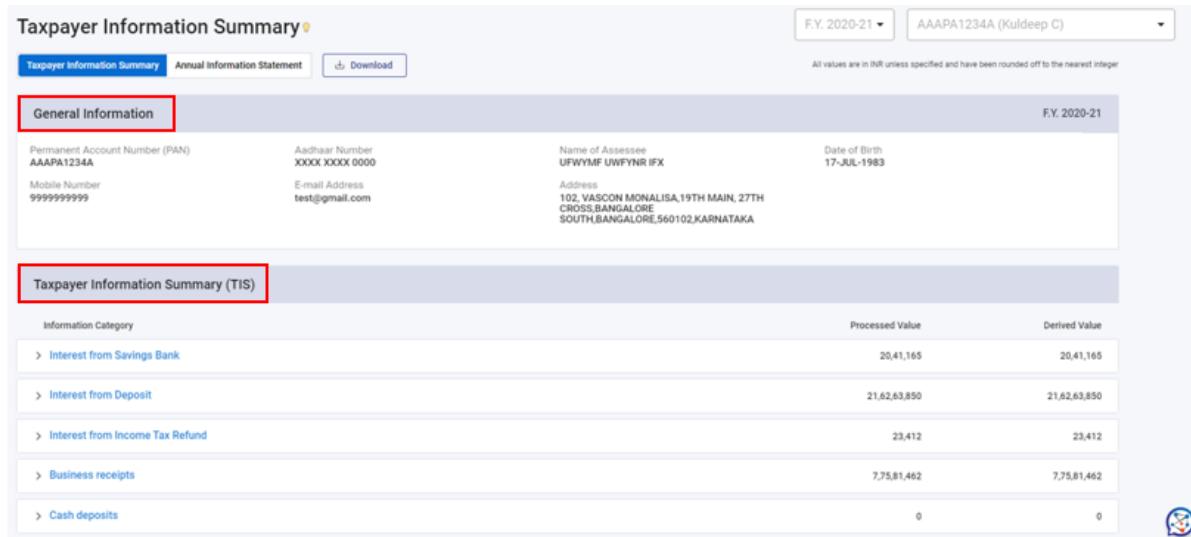
The screenshot shows the 'Taxpayer Information Summary' page. At the top, there are dropdowns for 'F.Y. 2020-21' and 'AAAPAA1234A (Kuldeep C)'. Below this, the 'General Information' section displays taxpayer details: Permanent Account Number (PAN) AAAPAA1234A, Aadhaar Number XXXX XXXX 0000, Name of Assessee UFWYMF UWFYNNR IFX, Date of Birth 17-JUL-1983, Mobile Number 9999999999, and E-mail Address test@gmail.com. The 'Address' section shows 102, VASCON MONALISA, 19TH MAIN, 27TH CROSS, BANGALORE, SOUTH, BANGALORE, 560102, KARNATAKA. The 'Taxpayer Information Summary (TIS)' section lists information categories with their processed and derived values:

Information Category	Processed Value	Derived Value
> Interest from Savings Bank	20,41,165	20,41,165
> Interest from Deposit	21,62,63,850	21,62,63,850
> Interest from Income Tax Refund	23,412	23,412
> Business receipts	7,75,81,462	7,75,81,462
> Cash deposits	0	0

Figure 40 TIS Page View

6.2 Parts in TIS

Taxpayer details and Information is displayed in TIS in the following two parts, General Information and Taxpayer Information Summary (TIS) as covered below, after clicking the TIS tile from the AIS homepage.



The screenshot shows the 'Taxpayer Information Summary' page with the 'General Information' and 'Taxpayer Information Summary (TIS)' sections highlighted with red boxes. The 'General Information' section displays the same details as in Figure 40. The 'Taxpayer Information Summary (TIS)' section is identical to the one in Figure 40, showing the same processed and derived values for various categories.

Figure 41 TIS Parts

General Information: It displays general information pertaining to the taxpayer including PAN, Masked Aadhar Number, Name of the Assessee, Date of Birth/ Incorporation /Formation, mobile number, e-mail address and address of Taxpayer.

Taxpayer Information Summary (TIS): It shows processed and derived value for each Information Category for which information is received (for such FY). User will be able to view L3 Level Information and [L2 level information](#) on TIS.

Taxpayer Information Summary (TIS)						
Information Category		Processed Value	Derived Value			
Interest from Savings Bank		20,41,165	20,41,165			
Details						
Part	Information Description	Information Source	Amount Description			
				Reported	Processed	Derived
SFT	Interest Income (SFT-016) – Savings	BCPK OF MAHARASHTRA (AAACCB0774B,AB220)	Interest	9,65,188	9,65,188	9,65,188
SFT	Interest Income (SFT-016) – Savings	SVCTE BANK OF INDIA (AAACSB577K,AB703)	Interest	9,27,084	9,27,084	9,27,084
SFT	Interest Income (SFT-016) – Savings	BCPK OF BARODA (AAACB1536F,AB566)	Interest	99,029	99,029	99,029
SFT	Interest Income (SFT-016) – Savings	BCPK OF INDIA (AAACB0472C,ZB709)	Interest	26,090	26,090	26,090
SFT	Interest Income (SFT-016) – Savings	TJG KARAD URBAN CO OP BANK LTD KARAD (AAAAAT3981A,AC892)	Interest	23,675	23,675	23,675

Figure 42 Information Category Sources

L3 Level Information

Details aggregated at information category level is displayed by default in TIS. On expanding, the information source wise details (L2 level) can be viewed as shown in the figure above.

L2 Level Information

Details aggregated at information code and information source under specific information category is displayed when L3 level view is expanded.

This view also displays the reported, processed and derived value of relevant information.

At this level, the processing of duplicate information is also done by the system to club duplicate information (displayed in grey) under one information category and accordingly calculate the processed value.

Reported Value refers to information value as reported by the information source against a PAN.

Processed Value refers to value after processing (including deduplication of information) based on pre-defined rules.

Derived value refers to value displayed in Taxpayer Information Summary (TIS) which is derived after considering the taxpayer feedback (if any) and processed value. The derived information will be used for prefilling of Return.

Refer [Illustrations displaying the logic for calculation of values in TIS](#)

Note: If the reported value/ processed value is not correct, taxpayer is advised to provide feedback in AIS to update the derived value which is used for pre-filling of Income Tax Return (ITR).

6.3 Download TIS

Other than viewing the Taxpayer Information Summary (TIS), taxpayer can download Taxpayer Information Summary (TIS) in PDF format and JSON by following below mentioned steps on the portal:

Step 1: Access AIS Homepage.

Step 2: Click on download icon available under Taxpayer Information Summary (TIS) Tab.



Figure 43 AIS Homepage

Step 3: Click on “Download” button and download Taxpayer Information Summary (TIS) - PDF.

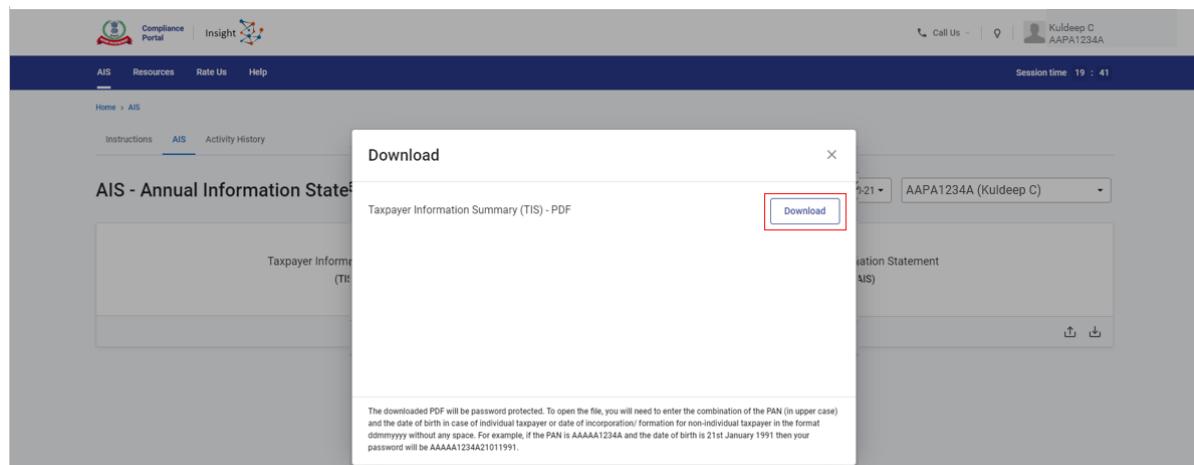


Figure 44 Download TIS - PDF

If the PDF file size is large, the download request will be initiated, and the link will be made available in activity history tab once the file is ready for download. Refer ([Download files from Activity History](#))

Note: If the files that you are trying to download exceed a size limit of defined records (currently 1500 records), then you will not be able to download the PDF files. In such scenario please download the AIS JSON file.

Note: The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation/ formation for non-individual taxpayer in the format ddmmmyyyy without any space. For example, if the PAN is AAAA1234A and the date of birth is 21st January 1991 then your password will be AAAA1234A21011991.

7 Activity History

All the relevant activities carried out by the user are viewable in activity history and the same can be downloaded from the portal.

7.1 View AIS Activity History

User will be provided summary view of activity performed by him on the AIS functionality. System generated Id (Activity ID) will be created for each performed activity, Activity date, Activity description and detail will be displayed under this tab.

Activity History Last updated: 31-AUG-2021, 2:48 PM

Activity List						Filter
Date	Activity	Description	Reference Id	User	Source	
31-AUG-2021, 14:48 PM	AIS Viewed	Annual Information Statement Viewed - F.Y. 2020-21	3108202114000528	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJI)	172.16.19.92	
31-AUG-2021, 14:45 PM	AIS Downloaded	AIS - F.Y. 2020-21	3108202114000499	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJI)	172.16.19.92	
31-AUG-2021, 14:43 PM	TIS Downloaded	TIS - F.Y. 2020-21	3108202114000478	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJI)	172.16.19.92	

The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation / formation for non-individual taxpayer in the format ddmmmyyyy without any space. For example, if the PAN is AAAAA1234A and the date of birth is 21st January 1991 then your password will be AAAAA1234A21011991.

Figure 45 Activity History Screen

To have a **detailed view of the Activity History**, click on the expand icon as shown:

Activity History Last updated: 31-AUG-2021, 2:46 PM

Activity List						Filter
Date	Activity	Description	Reference Id	User	Source	
31-AUG-2021, 14:45 PM	AIS Downloaded	AIS - F.Y. 2020-21	3108202114000499	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJI)	172.16.19.92	
		File Type - JSON				
		Channel - Portal				
31-AUG-2021, 14:43 PM	TIS Downloaded	TIS - F.Y. 2020-21	3108202114000478	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJI)	172.16.19.92	

The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation / formation for non-individual taxpayer in the format ddmmmyyyy without any space. For example, if the PAN is AAAAA1234A and the date of birth is 21st January 1991 then your password will be AAAAA1234A21011991.

Figure 46 Activity History Details

7.1.1 Download files from Activity History

When user is trying to download any file (relating to AIS/ TIS) and the file size is large, the request for download will be captured. Once the file is available, the same will be displayed in activity history and the link will be made available in activity history tab once the file is ready for download. User can also download Feedback Acknowledgement Receipt from Activity History after submitting the feedback on any information.

Activity List						Filter
	Date	Activity	Description	Reference Id	User	Source
»	31-AUG-2021, 15:17 PM	Consolidated Feedback Downloaded	AIS Feedback - F.Y. 2020-21	3108202115000209	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92
»	31-AUG-2021, 14:52 PM	Feedback Submitted	Feedback - 1 entry	3108202114000583	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92 
»	31-AUG-2021, 14:51 PM	Bulk Feedback Submitted	Bulk Feedback - 5 entries	3108202114000566	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92 
»	31-AUG-2021, 14:48 PM	AIS Viewed	Annual Information Statement Viewed - F.Y. 2020-21	3108202114000528	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92
»	31-AUG-2021, 14:45 PM	AIS Downloaded	AIS - F.Y. 2020-21	3108202114000499	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92
»	31-AUG-2021, 14:43 PM	TIS Downloaded	TIS - F.Y. 2020-21	3108202114000478	ACCCC7364G (HFINQF MJFQYMHFWJ QNRNYJ)	172.16.19.92

The downloaded PDF will be password protected. To open the file, you will need to enter the combination of the PAN (in upper case) and the date of birth in case of individual taxpayer or date of incorporation / formation for non-individual taxpayer in the format ddmm/yyyy without any space. For example, if the PAN is AAAAA1234A and the date of birth is 21st January 1991 then your password will be AAAAA1234A21011991.

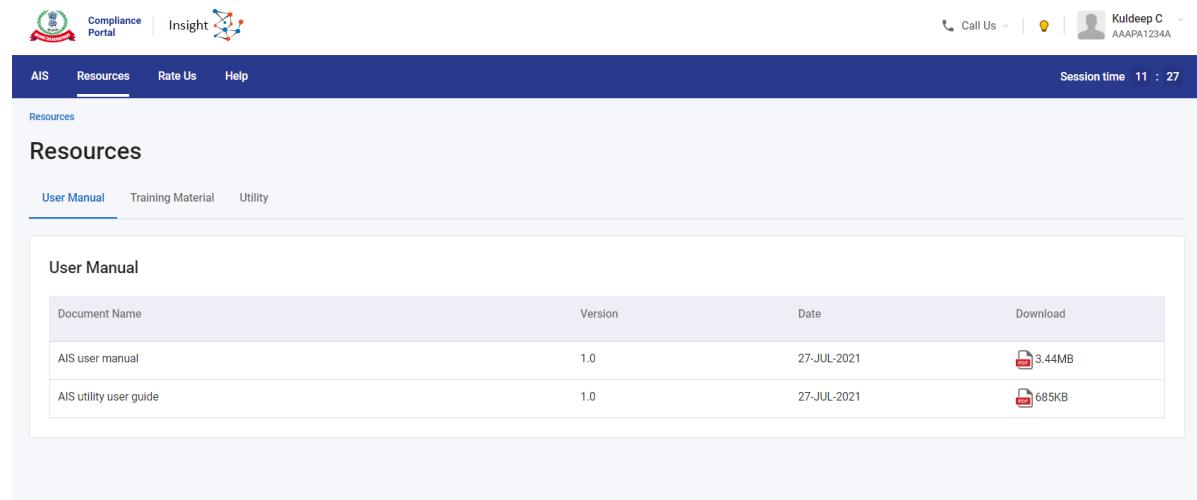
Figure 47 Download Activity History

8 Resources, Rate Us, Help

These three sections are meant to help the users with the easy access to the portal and feedback.

8.1 Resources

For the ease of the users to understand AIS and the related functionalities, various resources have been created which are discussed below:



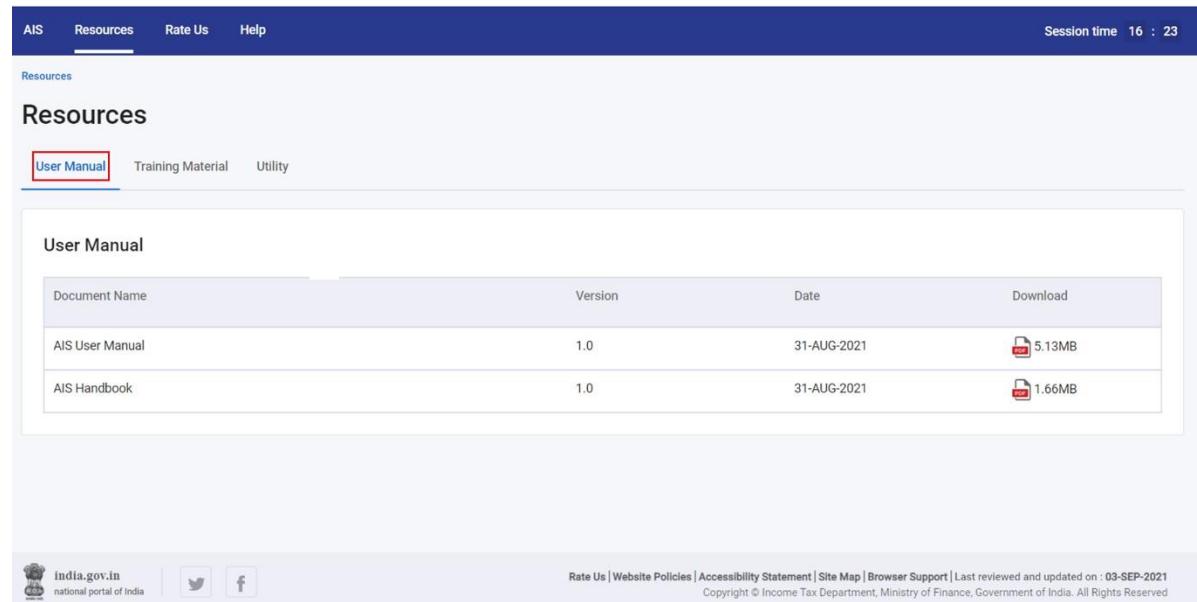
The screenshot shows the 'Resources' section of the AIS portal. The 'User Manual' tab is selected, displaying a table of documents:

Document Name	Version	Date	Download
AIS user manual	1.0	27-JUL-2021	 3.44MB
AIS utility user guide	1.0	27-JUL-2021	 685KB

Figure 48 AIS Resources

8.1.1 User Manual

The User Manual tab contains user guides, which are intended to give step by step assistance to users in using the AIS functionality on Compliance Portal (AIS Homepage). It can be referred for detailed information on how to accomplish a task on the Compliance Portal (AIS Homepage). It can be accessed from “Resources” section by clicking on the “User Manual” tab.



The screenshot shows the 'User Manual' page. The 'User Manual' tab is selected, displaying a table of documents:

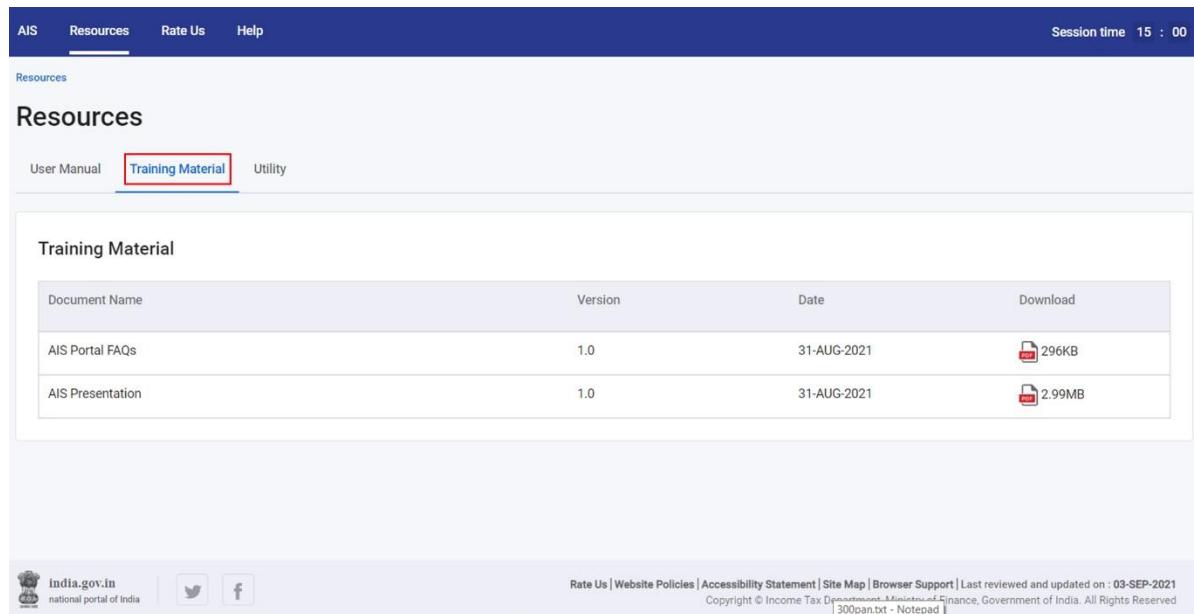
Document Name	Version	Date	Download
AIS User Manual	1.0	31-AUG-2021	 5.13MB
AIS Handbook	1.0	31-AUG-2021	 1.66MB

Figure 49 User Manual

8.1.2 Training Material

Training Material contains multiple documents intended to give assistance to taxpayer/tax professionals in using the Compliance Portal.

In the AIS Homepage, navigate to the “Resources” tab and click on “Training Material”.



The screenshot shows the 'Resources' section of the AIS homepage. The 'Training Material' tab is highlighted with a red box. The table below lists two documents:

Document Name	Version	Date	Download
AIS Portal FAQs	1.0	31-AUG-2021	 296KB
AIS Presentation	1.0	31-AUG-2021	 2.99MB

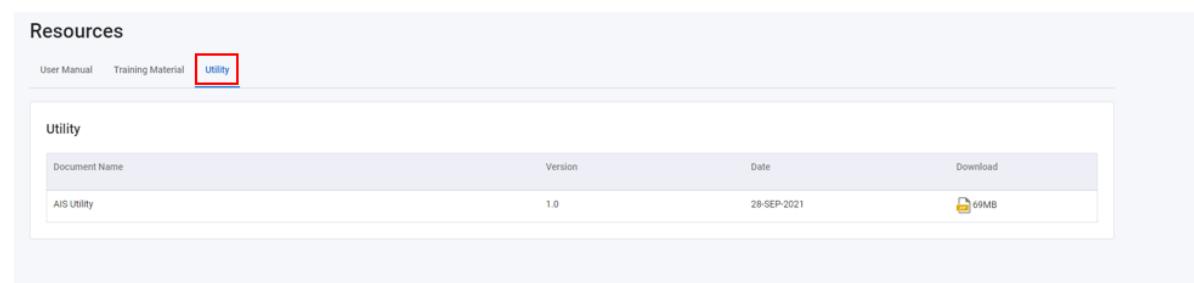
Figure 50 Training Material

8.1.2.1 Frequently Asked Questions (FAQ's)

Frequently Asked Questions (FAQ's) are intended to give assistance to the taxpayer in clearing the common doubts likely to be raised by the taxpayers. It can be accessed from “Resources” section by clicking on the “Training Material” tab. They are also available in [Help](#) section on Compliance Portal (AIS Homepage).

8.1.3 Utility

User can view Annual Information Statement (all parts and information) by importing the downloaded **(AIS) – JSON** file and can provide the feedback through AIS Utility in offline mode. AIS Utility can be accessed from “Resources” section by clicking on the “Utility” tab.



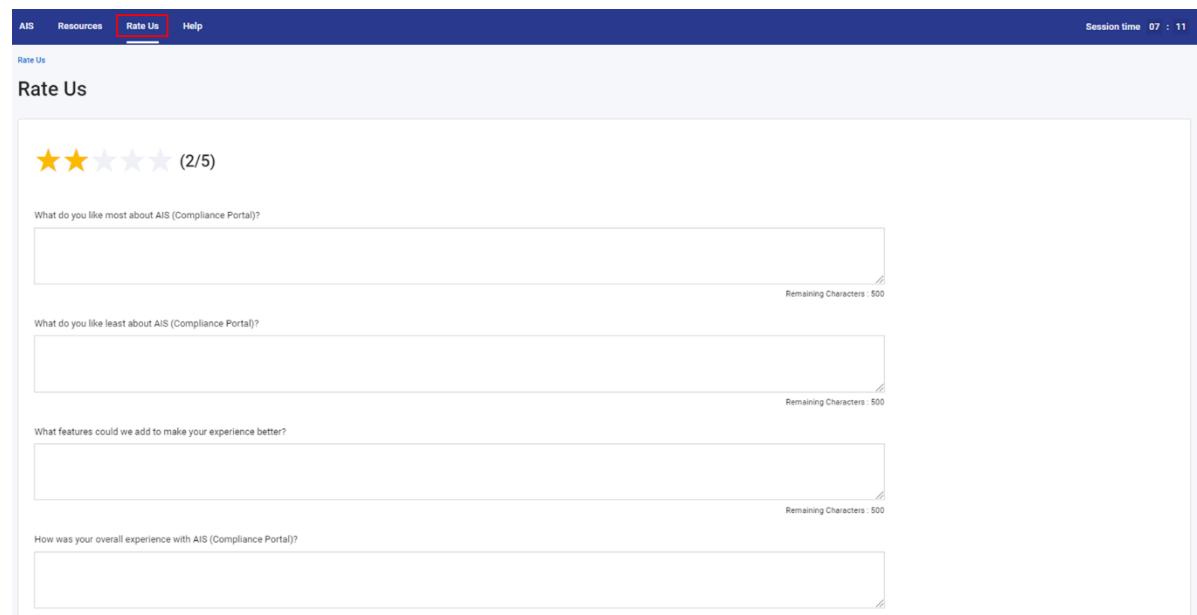
The screenshot shows the 'Resources' section of the AIS homepage. The 'Utility' tab is highlighted with a red box. The table below lists one document:

Document Name	Version	Date	Download
AIS Utility	1.0	28-SEP-2021	 59MB

Figure 51 Download Utility

8.2 Rate Us

Users can provide their views and suggestions based on their experience with the Portal.

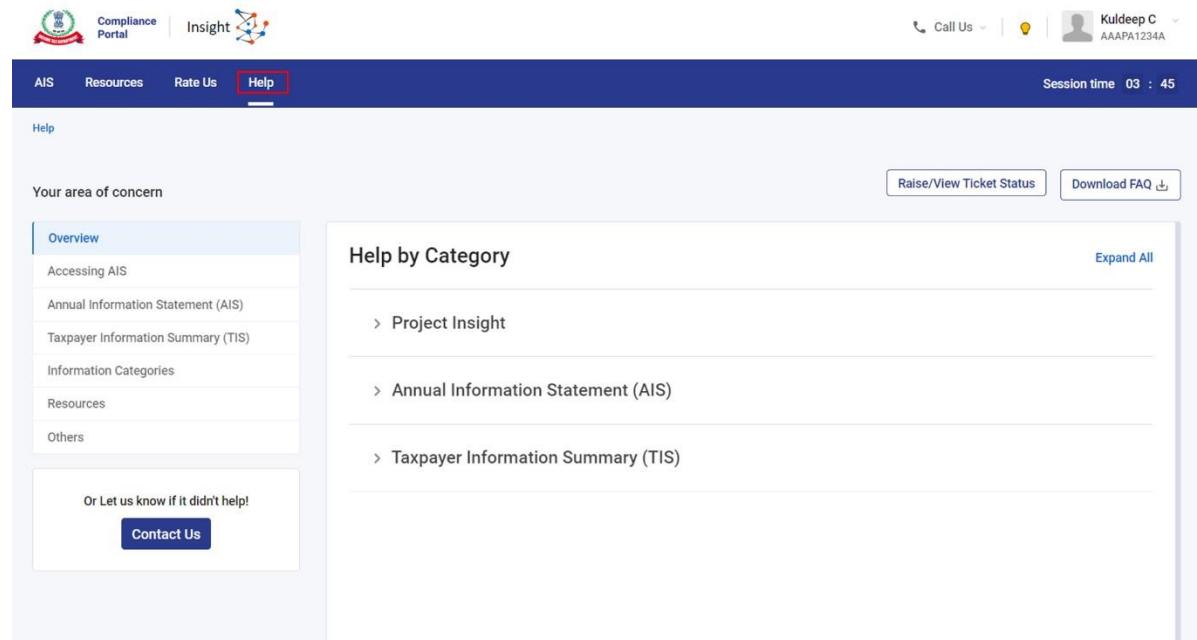


The screenshot shows the 'Rate Us' page. At the top, there are navigation tabs: AIS, Resources, Rate Us (which is highlighted with a red box), and Help. The session time is 07 : 11. The main content area is titled 'Rate Us'. It displays a rating of 2/5 with two yellow stars and three white stars. Below the rating are four text input fields with character limits of 500 each. The first field is for 'What do you like most about AIS (Compliance Portal)?', the second for 'What do you like least about AIS (Compliance Portal)?', the third for 'What features could we add to make your experience better?', and the fourth for 'How was your overall experience with AIS (Compliance Portal)?'.

Figure 52 Rate Us

8.3 Help

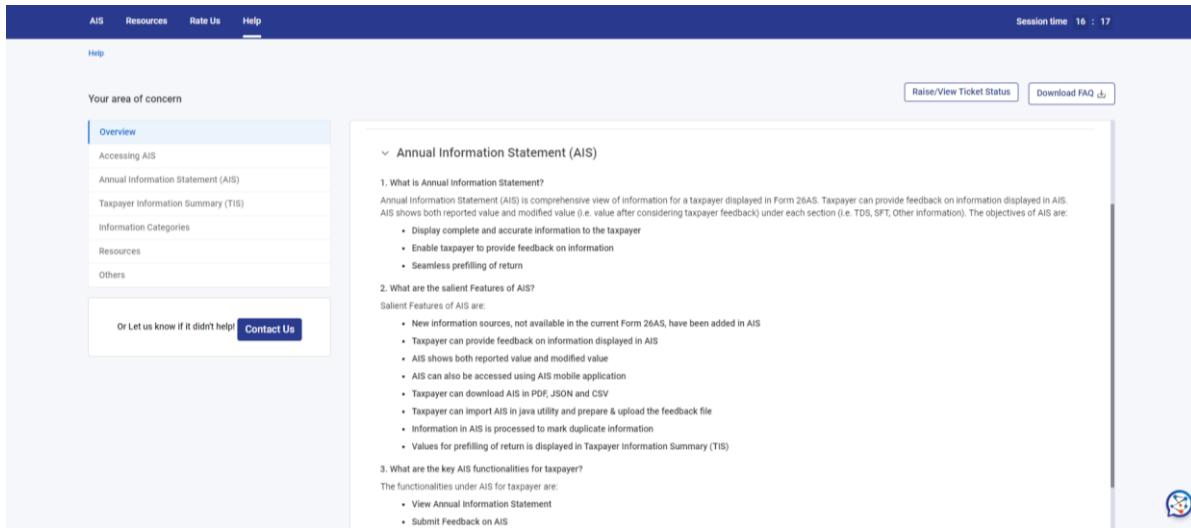
Users can click on the Help Tab to access common FAQ's, Contact Us - or Raise/View Ticket Status in case of any issue/escalations.



The screenshot shows the 'Help' page. At the top, there are navigation tabs: AIS, Resources, Rate Us, and Help (which is highlighted with a red box). The session time is 03 : 45. The top right corner shows a user profile for 'Kuldeep C' (AAAPKA1234A) with options to 'Call Us' and 'Raise/View Ticket Status' (which is highlighted with a red box) and a 'Download FAQ' link. The main content area is titled 'Help'. On the left, there is a sidebar with a 'Your area of concern' section containing a list of topics: Overview, Accessing AIS, Annual Information Statement (AIS), Taxpayer Information Summary (TIS), Information Categories, Resources, and Others. Below this is a 'Or Let us know if it didn't help!' section with a 'Contact Us' button. The main content area has a 'Help by Category' section with a 'Expand All' link. It lists categories: Project Insight, Annual Information Statement (AIS), and Taxpayer Information Summary (TIS).

Figure 53 Help

To get the detailed information on a specific help topic, user can further click on the subcategory.

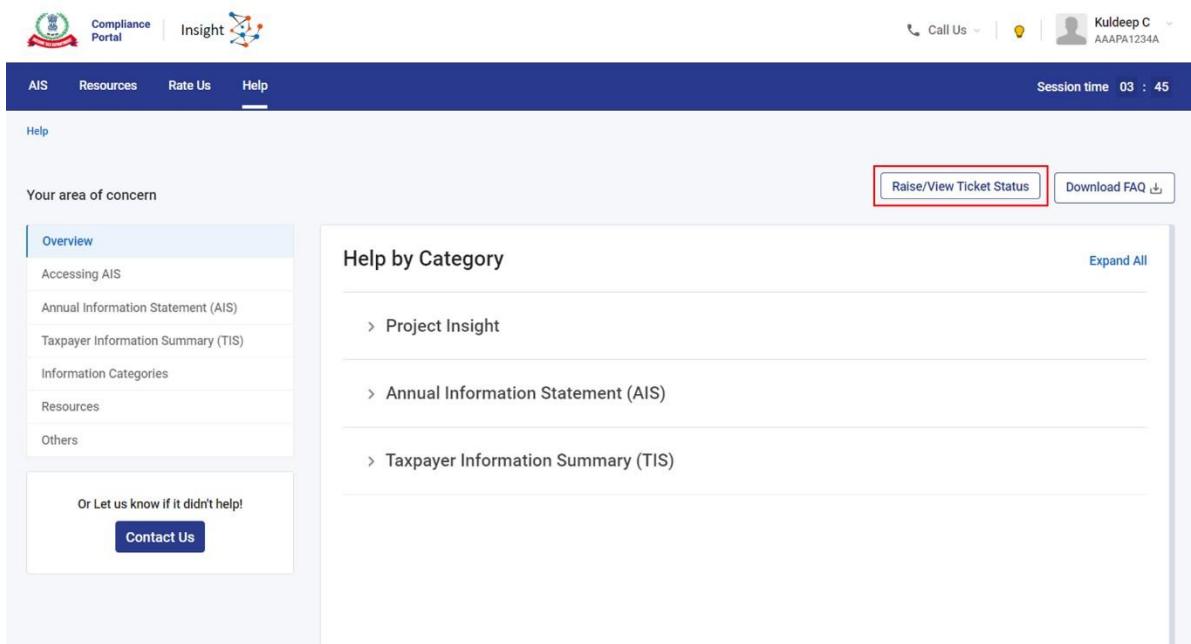


The screenshot shows the 'Help' section of the AIS Portal. The left sidebar lists categories: Overview, Accessing AIS, Annual Information Statement (AIS), Taxpayer Information Summary (TIS), Information Categories, Resources, and Others. The 'Overview' tab is selected. The main content area shows a detailed help topic for 'Annual Information Statement (AIS)'. Sub-sections include: 1. What is Annual Information Statement? (with a list of objectives: Display complete and accurate information to the taxpayer, Enable taxpayer to provide feedback on information, Seamless prefilling of return); 2. What are the salient Features of AIS? (with a list of features: New information sources, Taxpayer can provide feedback on information displayed in AIS, AIS shows both reported value and modified value, AIS can also be accessed using AIS mobile application, Taxpayer can download AIS in PDF, JSON and CSV, Taxpayer can import AIS in java utility and prepare & upload the feedback file, Information in AIS is processed to mark duplicate information, Values for prefilling of return is displayed in Taxpayer Information Summary (TIS)); and 3. What are the key AIS functionalities for taxpayer? (with a list of functionalities: View Annual Information Statement, Submit Feedback on AIS). Buttons for 'Raise/View Ticket Status' and 'Download FAQ' are at the top right of the content area.

Figure 54 Detailed Help

If the query is not resolved even after that, the user can then raise a ticket for the same using the steps mentioned below:

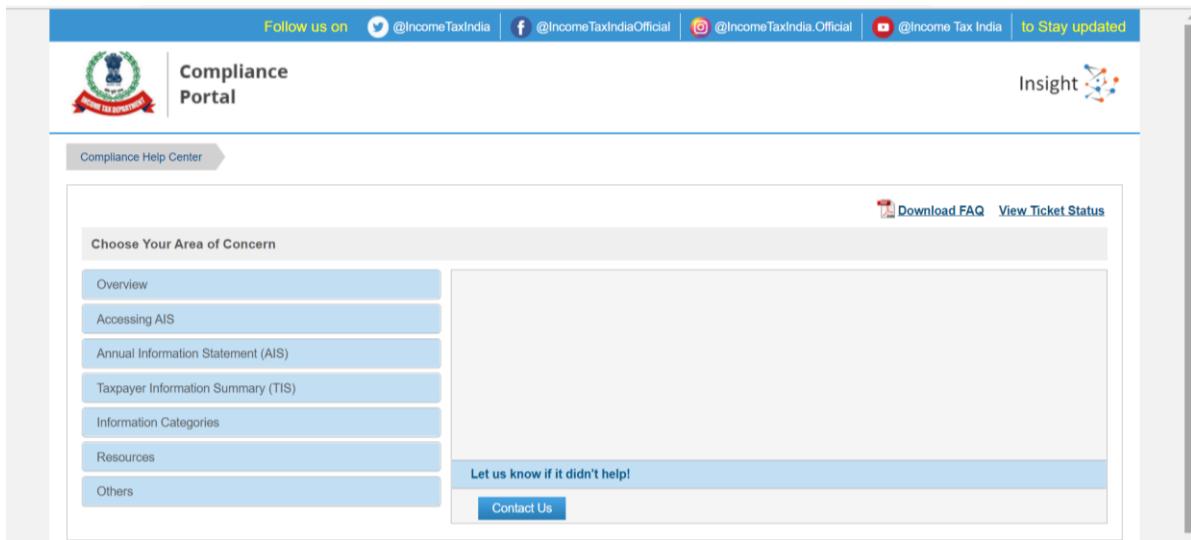
Step 1: Click on “Raise/View Ticket Status” button given in the Help section.



The screenshot shows the 'Help' section of the AIS Portal. The layout is similar to Figure 54, with the 'Raise/View Ticket Status' button highlighted with a red box. The 'Help by Category' section on the right lists: Project Insight, Annual Information Statement (AIS), and Taxpayer Information Summary (TIS). The 'Raise/View Ticket Status' and 'Download FAQ' buttons are located at the top right of the content area.

Figure 55 Raise a ticket

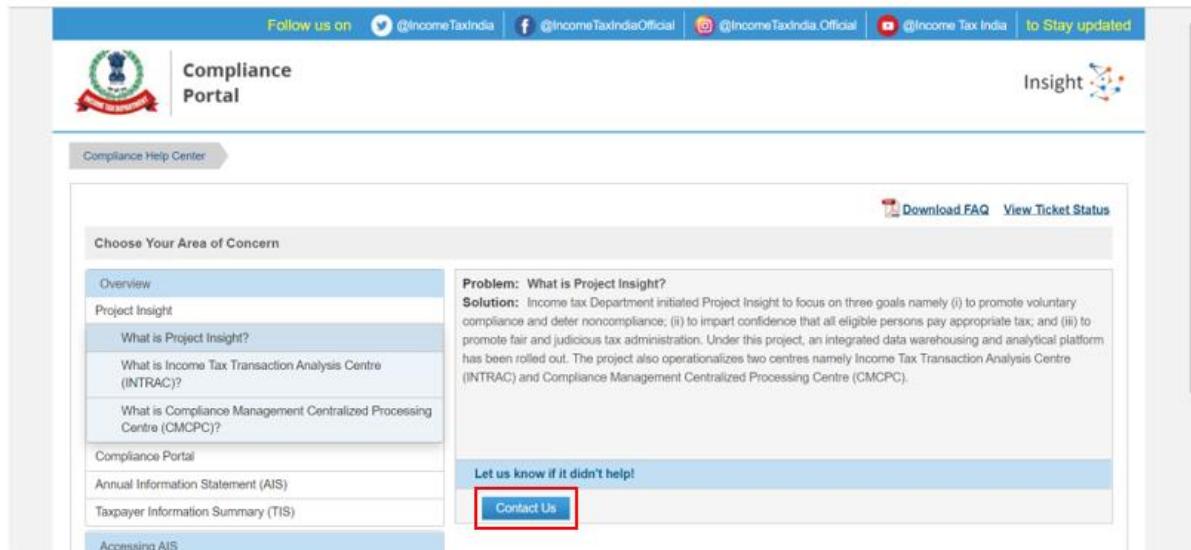
Step 2: Choose the category of your area of concern.



The screenshot shows the 'Compliance Portal' interface. At the top, there is a navigation bar with social media links for @IncomeTaxIndia, @IncomeTaxIndiaOfficial, @IncomeTaxIndia.Official, @Income Tax India, and a link to 'to Stay updated'. The 'Compliance Portal' logo is on the left, and the 'Insight' logo is on the right. Below the navigation bar, there is a 'Compliance Help Center' section. On the left, a sidebar titled 'Choose Your Area of Concern' lists several categories: Overview, Accessing AIS, Annual Information Statement (AIS), Taxpayer Information Summary (TIS), Information Categories, Resources, and Others. The 'Overview' category is highlighted with a blue background. On the right, there is a large empty box with a 'Download FAQ' and 'View Ticket Status' link at the top. Below this box, there is a 'Let us know if it didn't help!' section with a 'Contact Us' button.

Figure 56 Choose ticket category

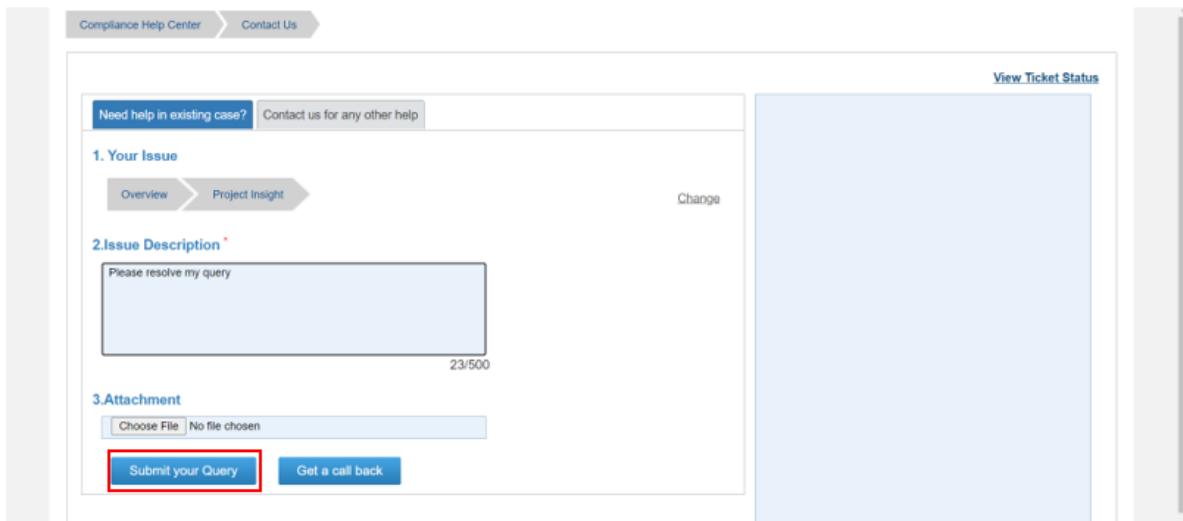
Step 3: Choose the sub-category of your area of concern and click on “Contact Us”.



The screenshot shows the 'Compliance Portal' interface, similar to Figure 56. The 'Choose Your Area of Concern' sidebar now shows a sub-category under 'Overview': 'Project Insight'. The 'What is Project Insight?' link is selected, and its content is displayed in the main area. The content includes a 'Problem: What is Project Insight?' section and a 'Solution' section. The 'Solution' section states: 'Income tax Department initiated Project Insight to focus on three goals namely (i) to promote voluntary compliance and deter noncompliance; (ii) to impart confidence that all eligible persons pay appropriate tax; and (iii) to promote fair and judicious tax administration. Under this project, an integrated data warehousing and analytical platform has been rolled out. The project also operationalizes two centres namely Income Tax Transaction Analysis Centre (INTRAC) and Compliance Management Centralized Processing Centre (CMCPC).'. Below this content, there is a 'Let us know if it didn't help!' section with a 'Contact Us' button, which is highlighted with a red box.

Figure 57 Choose ticket sub-category

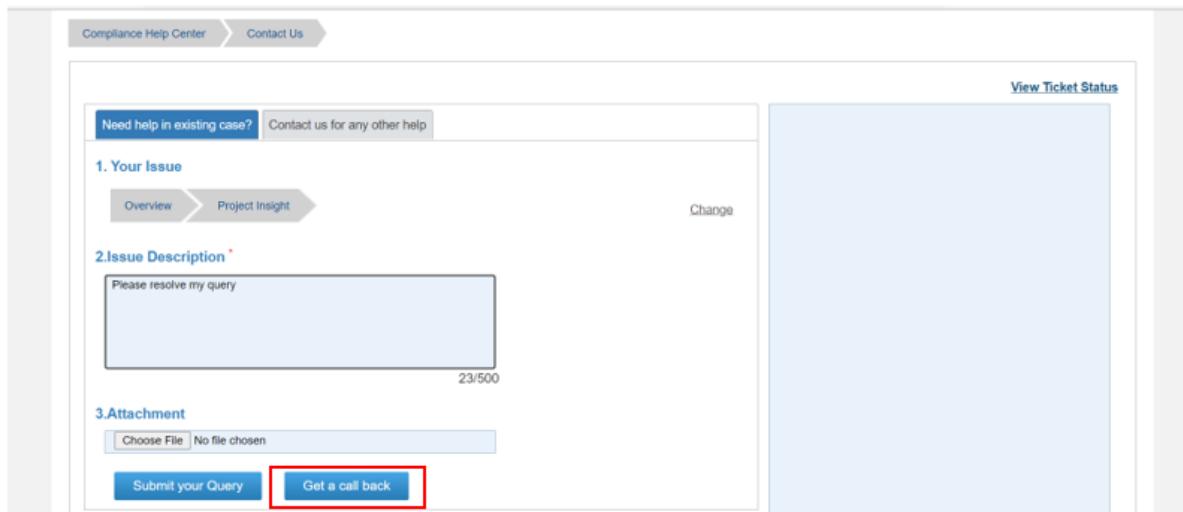
Step 4: You can change your issue if you wish to, by clicking on the change button. Write the issue description and attach relevant documents, if any. Click on “**Submit your Query**” button.



The screenshot shows a web-based ticket submission form. At the top, there are navigation links: 'Compliance Help Center' and 'Contact Us'. Below these are two buttons: 'Need help in existing case?' and 'Contact us for any other help'. The main form area is divided into sections: '1. Your Issue' (with 'Overview' and 'Project Insight' tabs), '2. Issue Description' (containing a text input field with placeholder 'Please resolve my query' and character count '23/500'), and '3. Attachment' (with a 'Choose File' button and message 'No file chosen'). At the bottom of the form are two buttons: 'Submit your Query' (highlighted with a red box) and 'Get a call back'.

Figure 58 Submit query

Step 5: You can also request a call back from the Helpdesk team by clicking on the “**Get a call back**” button.

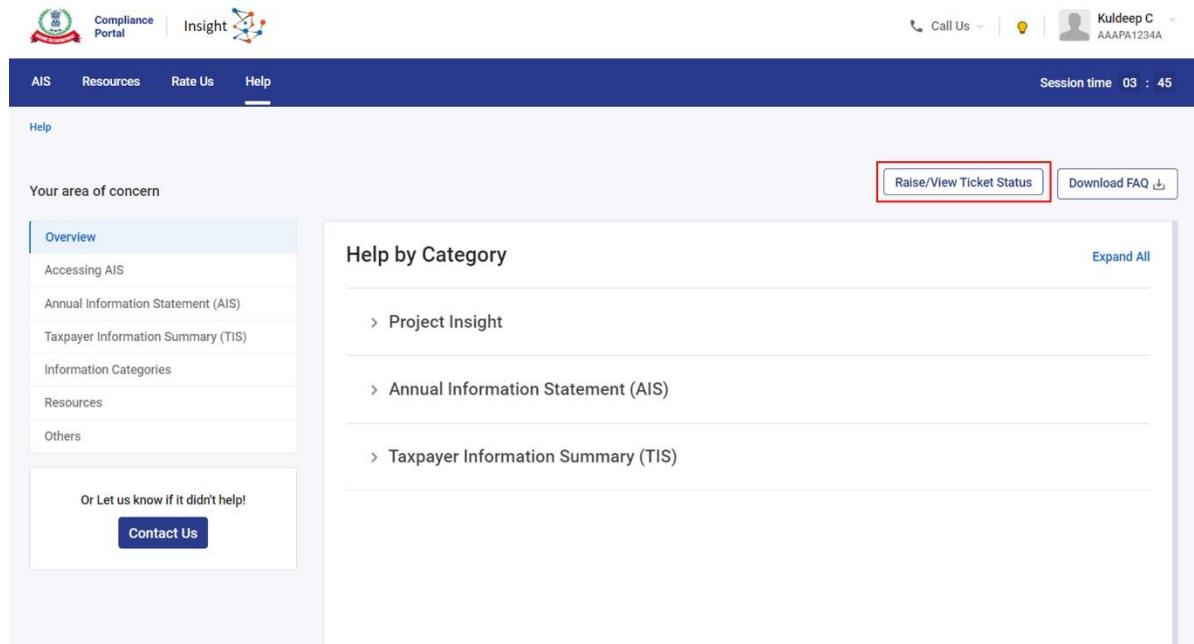


This screenshot is identical to Figure 58, showing the 'Submit query' page. The 'Get a call back' button at the bottom of the form is highlighted with a red box.

Figure 59 Get a call back

Step 6: Once a ticket is logged by the user, you will receive your Ticket id, and a relevant notification regarding the same.

Also, by clicking on “Raise/ View Ticket Status” user can check the status of an existing ticket.



The screenshot shows the 'Help' section of the AIS Compliance Portal. At the top, there are links for 'AIS', 'Resources', 'Rate Us', and 'Help'. The 'Help' link is underlined. On the right, there are buttons for 'Call Us', a lightbulb icon, and a user profile for 'Kuldeep C AAAPA1234A'. The session time is '03 : 45'. Below the top navigation, there's a 'Your area of concern' section with a sidebar containing 'Overview', 'Accessing AIS', 'Annual Information Statement (AIS)', 'Taxpayer Information Summary (TIS)', 'Information Categories', 'Resources', and 'Others'. A button 'Or let us know if it didn't help!' with 'Contact Us' is also in this sidebar. The main content area is titled 'Help by Category' and lists 'Project Insight', 'Annual Information Statement (AIS)', and 'Taxpayer Information Summary (TIS)'. A 'Raise/View Ticket Status' button is highlighted with a red box. At the bottom right of the content area, there's a 'Download FAQ' button.

Figure 60 Check ticket status

If your query still unsolved, you can connect with the Helpdesk team by calling on the toll-free number (**1800 103 4215**).

8.4 Chatbot

A chatbot is an artificial intelligence (AI)-aided software that can simulate a conversation (or a chat) with a user in natural language. The user can post the query on the chatbot and can get instant replies/ resolution based on the frequently asked questions and machine learning. The same is implemented on Compliance Portal to enable quick help to the users.

User can post their query on the chatbot provided on AIS Homepage or navigate through the question category provided by the chatbot to get instant answer for specific questions.

8.4.1 Accessing Chatbot

The chatbot can be accessed at following places through mentioned steps:

On Pre-login Page of Compliance Portal (AIS Homepage):

Step 1: Navigate to Compliance Portal through URL <https://compliance.insight.gov.in/>

Step 2: Click on the chatbot icon provided on lower right corner of the screen.

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 **Compliance Portal**

[Login](#)

I want to...

- Submit Response against High Value Transactions
- Submit Response against 'Significant Transactions'
- Submit Response against 'Non-Filing of Return'
- View my cases and information
- Submit online response

Quick Links

- Quick Filing of Returns
- Submit Returns/Forms
- e-Verify Return
- View Form 26AS (Tax Credit)
- Outstanding Tax Demand
- Tax Calculator
- Tax Calendar

News & Updates

One-time relaxation for Verification of tax-returns for the Assessment years 2015-16, 2016-17, 2017-18, 2018-19 and 2019-20 which are pending due to non-filing of ITRV form and processing of such returns
The one-time relaxation to the taxpayers for verification of tax-returns is for returns which are pending due to non-filing of ITRV form and processing of such returns.
13-07-2020

Amendment in Income Tax Rule 2BB to allow taxpayers who are opting for the new tax regime (section 115BAC) to claim exemptions for certain allowances
CBDT issued Notification No. 38/2020-Income Tax Dated- 26/06/2020 amending rule 2BB of Income Tax Rules to allow taxpayers who are opting for the new tax regime (section 115BAC) to claim exemption for allowance to meet cost of travel and daily expenses on transfer,tour allowance for travel for official purposes to meet the travel and daily expenses, and conveyance allowance for meeting conveyance expenditure incurred in course of performing official duties.
26-06-2020

CBDT issues Notification on Extension of time limits under the Income Tax Act, 1961 and related Acts
Central Government hereby specifies , for the purposes of the said sub-section (1),(i) the 31st day of December, 2020 shall be the end date of the period during which the time limit specified in, or prescribed or notified under, the specified Act falls for the completion or verification of such action aspecified under the said sub-section; and (ii) the 31st day of March, 2021 shall be the end date to which the time limit for completion or verification ofsuch action shall stand extended.
24-06-2020

S.O. 1879(E)- In exercise of the powers conferred by clause (v) of the

Resources

- User manual
- Training Material

FAQ

- Non-filing of Return
- Overview
- Resources
- Login
- e-Campaign

What is High Value Transactions under e-Campaign?

What is 'Significant Transactions' under e-Campaign?

What is 'Non-Filing of Return' under e-Campaign?

How do I ensure that I receive communication about e-verification?

What should I look for in a

Figure 61 Pre-login page Chatbot

Step 3: The chatbot window opens, navigate through the categories mentioned or type your query in “Ask me” area.

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 **Compliance Portal**

[Login](#)

I want to...

- Submit Response against High Value Transactions
- Submit Response against 'Significant Transactions'
- Submit Response against 'Non-Filing of Return'
- View my cases and information
- Submit online response

Quick Links

- Quick Filing of Returns
- Submit Returns/Forms
- e-Verify Return
- View Form 26AS (Tax Credit)
- Outstanding Tax Demand
- Tax Calculator
- Tax Calendar

News & Updates

One-time relaxation for Verification of tax-returns for the Assessment years 2015-16, 2016-17, 2017-18, 2018-19 and 2019-20 which are pending due to non-filing of ITRV form and processing of such returns
The one-time relaxation to the taxpayers for verification of tax-returns is for returns which are pending due to non-filing of ITRV form and processing of such returns.
13-07-2020

Amendment in Income Tax Rule 2BB to allow taxpayers who are opting for the new tax regime (section 115BAC) to claim exemptions for certain allowances
CBDT issued Notification No. 38/2020-Income Tax Dated- 26/06/2020 amending rule 2BB of Income Tax Rules to allow taxpayers who are opting for the new tax regime (section 115BAC) to claim exemption for allowance to meet cost of travel and daily expenses on transfer,tour allowance for travel for official purposes to meet the travel and daily expenses, and conveyance allowance for meeting conveyance expenditure incurred in course of performing official duties.
26-06-2020

CBDT issues Notification on Extension of time limits under the Income Tax Act, 1961 and related Acts
Central Government hereby specifies , for the purposes of the said sub-section (1),(i) the 31st day of December, 2020 shall be the end date of the period during which the time limit specified in, or prescribed or notified under, the specified Act falls for the completion or verification of such action aspecified under the said sub-section; and (ii) the 31st day of March, 2021 shall be the end date to which the time limit for completion or verification ofsuch action shall stand extended.
24-06-2020

S.O. 1879(E)- In exercise of the powers conferred by clause (v) of the

IVA

You are chatting with **Insight Virtual Assistant** [I'm Done](#)

Insight Virtual Assistant 3 Sep 2021 at 9:32:48 PM
Please select the category applicable for your query.

Ask me ...

Figure 62 Pre-login page Chatbot

On AIS Homepage:

Step 1: View AIS Homepage.

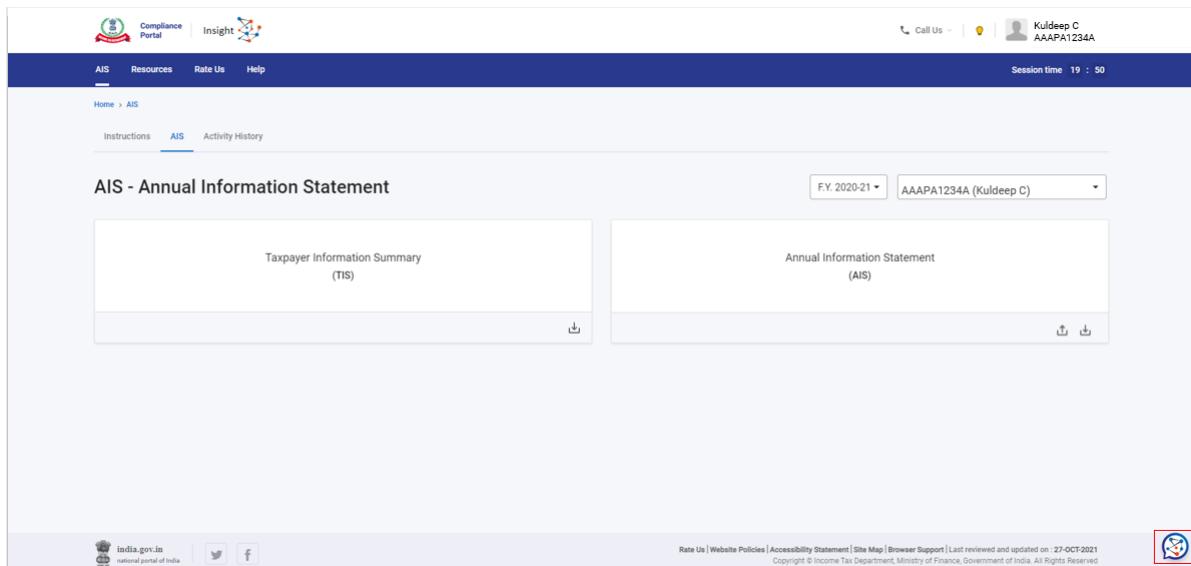


Figure 63 Post-login page Chatbot

Step 2: Click on the chatbot icon provided on lower right corner of the screen. The chatbot window opens, navigate through the categories mentioned or type your query in “Ask me” area.

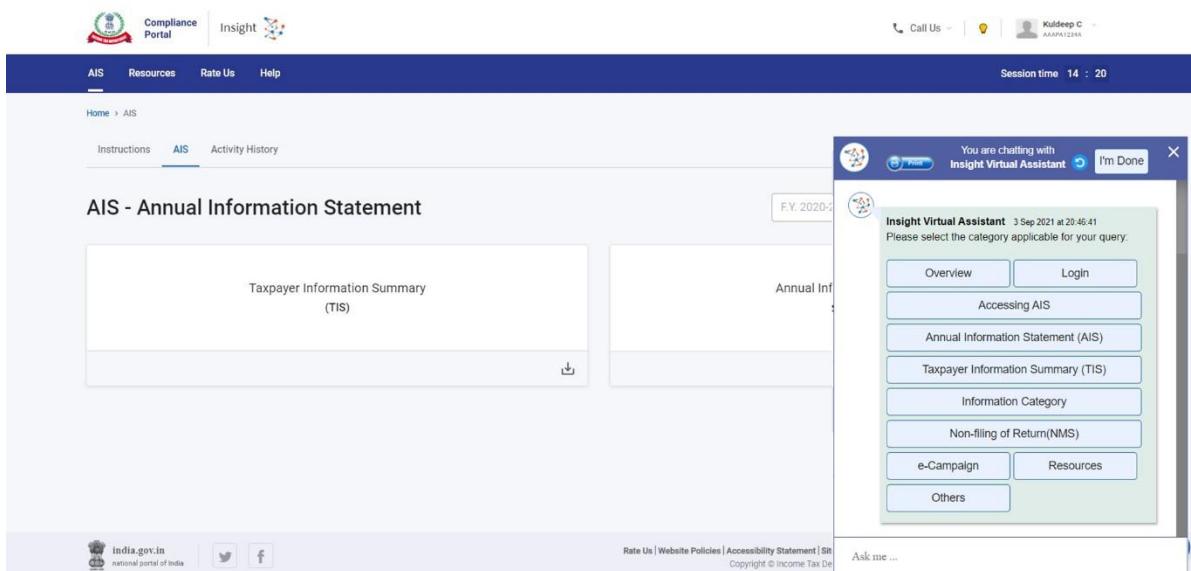
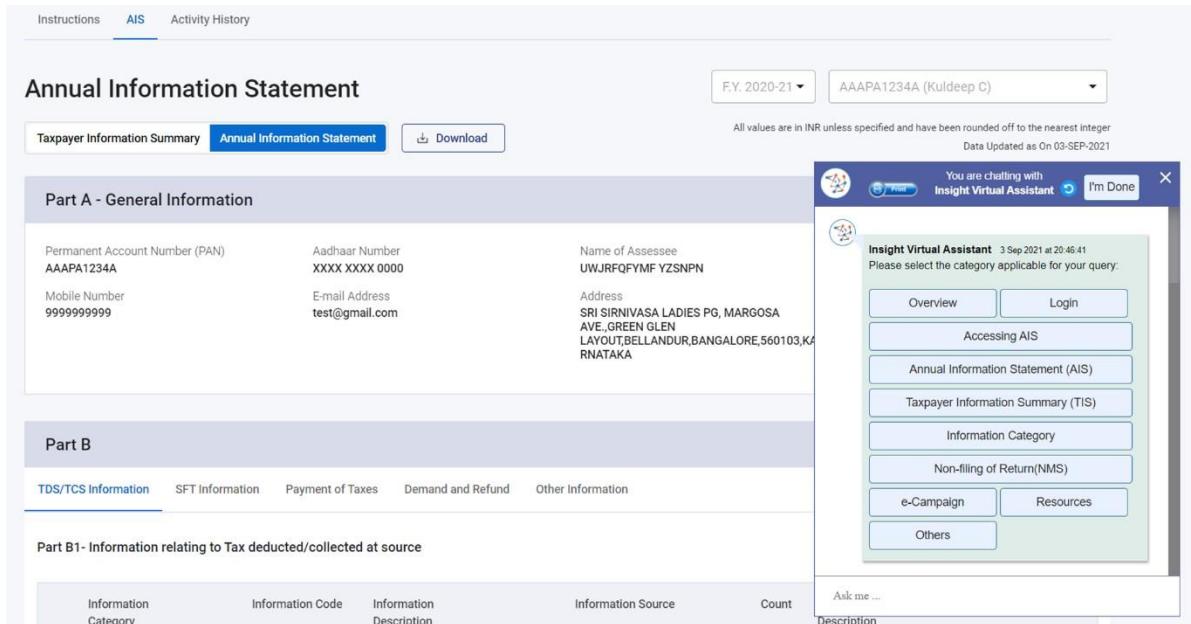


Figure 64 Post-login page Chatbot

Alternatively, Chatbot can also be accessed on View AIS and View TIS screens as shown below:



The screenshot shows the 'Annual Information Statement' page. At the top, there are tabs for 'Instructions', 'AIS' (which is selected), and 'Activity History'. Below the tabs, the page title 'Annual Information Statement' is displayed, along with a date range 'FY. 2020-21' and a dropdown for 'Taxpayer Information Summary' showing 'AAAPA1234A (Kuldeep C)'. A 'Download' button is also present. A note at the top right states: 'All values are in INR unless specified and have been rounded off to the nearest integer' and 'Data Updated as On 03-SEP-2021'. The main content area is divided into 'Part A - General Information' and 'Part B'. 'Part A' contains fields for Permanent Account Number (PAN), Aadhaar Number, Name of Assessee, and Address. 'Part B' contains tabs for 'TDS/TCS Information', 'SFT Information', 'Payment of Taxes', 'Demand and Refund', and 'Other Information'. The 'TDS/TCS Information' tab is selected. A sub-section 'Part B1- Information relating to Tax deducted/collected at source' is shown, with a table having columns: Information Category, Information Code, Information Description, Information Source, and Count. On the right side of the page, a 'Chatbot' window is open, titled 'You are chatting with Insight Virtual Assistant'. It shows a message from the bot: 'Insight Virtual Assistant 3 Sep 2021 at 20:46:41 Please select the category applicable for your query.' Below this are several buttons for different categories: Overview, Login, Accessing AIS, Annual Information Statement (AIS), Taxpayer Information Summary (TIS), Information Category, Non-filing of Return(NMS), e-Campaign, Resources, and Others. At the bottom of the chat window, there is a text input field with 'Ask me ...' and a 'Description' dropdown.

Figure 65 Post login page Chatbot

9 Glossary

Abbreviations	Description
Annual Information Statement (AIS)	AIS is comprehensive view of information for a taxpayer displayed in Form 26AS. It shows both reported value and modified value (i.e. value after considering taxpayer feedback) under each section (i.e. TDS, SFT, Other information)
Reported Value	Reported Value refers to information value as reported by the information source against a PAN.
Modified Value	Modified Value refers to value which has been modified by the taxpayer by submitting feedback. The reported value and value after feedback will be shown separately in the Annual Information Statement (AIS)
Taxpayer Information Summary (TIS)	TIS is an information category wise aggregated information summary for a taxpayer. It shows processed value (i.e. value generated after deduplication of information based on pre-defined rules) and derived value (i.e. value derived after considering the taxpayer feedback and processed value) under each information category (e.g. Salaries, Interest, Dividend etc.). The derived information in TIS will be used for prefilling of Return.
Processed Value	Processed Value refers to value after processing (including deduplication of information) based on pre-defined rules.
Derived value	Derived value refers to value displayed in Taxpayer Information Summary (TIS) which is derived after considering the taxpayer feedback (if any) and processed value. The derived information will be used for prefilling of Return.
Information Category	Information category is broad information category (refer Annexure A) which combines similar information sources to present a simplified summary to enable pre-filling of ITR.
L1 Level Information	L1 Level Information is the lowest level of information displayed in Annual Information Statement (AIS). Each information is displayed by unique Transaction sequence number (TSN). The taxpayer feedback is always captured at the L1 level. In case when taxpayer provides bulk feedback, the feedback is captured at TSN level. L1 Level display shows both reported value and modified value (i.e. value modified after considering the taxpayer feedback).
L2 Level Information	L2 Level Information is the source wise aggregated value displayed in Annual Information Statement (AIS) as well as Taxpayer Information Summary (TIS). During processing, duplicate information is marked at L2 level. L2 Level display shows reported value, processed value (i.e. value generated after deduplication of information based on pre-defined rules) and derived value (i.e. value derived after considering the taxpayer feedback).

Abbreviations	Description
<i>L3 Level Information</i>	L3 Level Information is the information category wise aggregated value displayed in Taxpayer Information Summary (TIS). During processing, duplicate information is marked at L2 level only. L2 Level display shows reported value, processed value (i.e. value generated after deduplication of information based on pre-defined rules) and derived value (i.e. value derived after considering the taxpayer feedback)

10 Annexures

10.1 Annexure -A: Customised Feedback Options

S.No.	Information category	Customized Feedback Options
1	Salary	Income is not taxable
2	Rent received	Income is not taxable
3	Dividend	Income is not taxable
4	Interest from savings bank	Income is not taxable
5	Interest from deposit	Income is not taxable
6	Interest from others	Income is not taxable
7	Interest from income tax refund	Income is not taxable
8	Rent on plant & machinery	Income is not taxable
9	Winnings from lottery or crossword puzzle u/s 115BB	Income is not taxable
10	Winnings from horse race u/s 115BB	Income is not taxable
11	Receipt of accumulated balance of pf from employer u/s 111	Income is not taxable
12	Interest from infrastructure debt fund u/s 115A(1)(a)(iia)	Income is not taxable
13	Interest from specified company by a non-resident u/s 115A(1)(a)(iiaa)	Income is not taxable
14	Interest on bonds and government securities	Income is not taxable
15	Interest from infrastructure debt fund u/s 115A(1)(a)(iia)	Income is not taxable
16	Income and long-term capital gain from units by an off shore fund u/s 115AB(1)(b)	Income is not taxable
17	Income and long-term capital gain from foreign currency bonds or shares of indian companies u/s 115AC	Income is not taxable
18	Income of foreign institutional investors from securities u/s 115AD(1)(i)	Income is not taxable
19	Insurance commission	Income is not taxable
20	Receipts from life insurance policy	Income is not taxable
21	Withdrawal of deposits under national savings scheme	Income is not taxable
22	Receipt of commission etc. on sale of lottery tickets	Income is not taxable
23	Income from investment in securitization trust	Income is not taxable
24	Income on account of repurchase of units by MF/UTI	Income is not taxable
25	Interest or dividend or other sums payable to government	Income is not taxable
26	Sale of land or building	Sale of rural agricultural land
27	Sale of land or building	Transfer not in the nature of sale
28	Receipts for transfer of immovable property	Not Applicable

S.No.	Information category	Customized Feedback Options
29	Sale of vehicle	Transfer not in the nature of sale
30	Sale of vehicle	Receipt is not taxable
31	Sale of securities and units of mutual fund	Transfer not in the nature of sale
32	Sale of securities and units of mutual fund	Income is not taxable
33	Off market debit transactions	Transfer not in the nature of sale
34	Off market debit transactions	Income is not taxable
35	Off market credit transactions	Transfer not in the nature of sale
36	Off market credit transactions	Income is not taxable
37	Business receipts	Receipt is not taxable
38	Business receipts	Receipt in the nature of reimbursement of expenses
39	Business receipts	Receipt in the nature of refundable security
40	Business receipts	Receipt treated as capital receipt
41	Rent payment	Not Applicable
42	Miscellaneous payment	Not Applicable
43	Cash deposits	Not Applicable
44	Cash withdrawals	Not Applicable
45	Cash payments	Not Applicable
46	Receipt of foreign remittance	Receipt in the nature of reimbursement of expenses
47	Receipt of foreign remittance	Receipt in the nature of refundable security
48	Receipt of foreign remittance	Receipt in the nature of capital receipt
49	Receipt of foreign remittance	Income is not taxable
50	Payment to non-resident sportsmen or sports association u/s 115BBA	Receipt in the nature of reimbursement of expenses
51	Payment to non-resident sportsmen or sports association u/s 115BBA	Receipt in the nature of refundable security
52	Payment to non-resident sportsmen or sports association u/s 115BBA	Receipt in the nature of capital receipt
53	Payment to non-resident sportsmen or sports association u/s 115BBA	Income is not taxable
54	Foreign travel	Not Applicable
55	Purchase of immovable property	Not Applicable
56	Purchase of vehicle	Not Applicable

S.No.	Information category	Customized Feedback Options
57	Purchase of time deposits	Not Applicable
58	Purchase of securities and units of mutual funds	Not Applicable
59	Balance in account	Information is non-reportable in return
60	Balance in account	Information is non-reportable in return
61	Credit/debit card	Not Applicable
62	Income distributed by business trust	Income is not taxable
63	Income distributed by investment fund	Income is not taxable

10.2 Annexure- B: Illustrations for AIS and TIS View

Illustration 1: Display of information reported under both TDS and SFT

Payment of dividend above Rs 5,000 is required to be reported under TDS Statement. Under SFT all dividend payment is required to be reported. In this case, Dividend payment of Rs 70,000 was reported by the Deductor (TAN based) under TDS and 74,000 was reported under SFT by the reporting entity.

Annual Information Statement (AIS)

TDS - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 AAAPA1234A (Kuldeep C)

All values are in INR unless specified
Data Updated as On 06-05-2021

Part A - General Information

F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.L.TI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B

Feedback Status:  Submitted  Partially Submitted

TDS/TCS Information **SFT Information** **Payment of Taxes** **Demand and Refund** **Other Information**

Part B1- Information relating to Tax deducted/collected at source (Values in INR)

Filter

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
▼  Dividend	TDS-194	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	02	Amount Paid / Credited	70,000

Details

Filter Bulk Feedback

Sr.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	Tax Deducted	Tax Deposited	Status	Feedback
1	Q1 (Apr- Jun)	04-Apr-2020	20,000	2,000	2,000	Active	
2	Q3 (Jan- Mar)	04-Mar-2021	50,000	5,000	5,000	Active	

SFT - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep C) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

Part A - General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOURHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E-mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B

Feedback Status: Submitted Partially Submitted

TDS/TCS Information SFT Information Payment of Taxes Demand and Refund Other Information

Part B2- Information relating to Specified Financial Transactions (Values in INR) Filter

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
Dividend	SFT-015	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	01	Total Dividend Amount	74,000
Details Filter Bulk Feedback Download						
Sr. No	Reported On	Dividend Amount		Status	Feedback	
1	05-May-2021	74,000		Active	Optional	

Note: In AIS, TDS information and SFT information is reported under sections B1 and B2

Taxpayer Information Summary (TIS)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep Choudhary) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number XXXX XXXX 9323	Name of Assessee KULDEEP CHOURHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E-mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Tax Information Summary (TIS)

Information Category	Processed Value	Derived Value		
> Salary	15,00,000	15,00,000		
> Rent received	3,80,000	2,80,000		
▽ Dividend	74,000	74,000		
Details Filter Download				
Part	Information Description	Information Source	Amount Description	Amount
SFT	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	Total Dividend Amount	74,000
TDS/ TCS	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	Amount Paid/ Credited	70,000

Note: Information reported under TDS is marked as Duplicate during Processing

Illustration 2: Display of taxpayer feedback

Taxpayer has been provided a facility to provide feedback. If the taxpayer reduces the dividend amount to 73,000 under SFT, the derived value i.e. value derived after considering the taxpayer feedback will be shown both in Annual Information Statement (AIS) and Taxpayer Information Summary (TIS).

Annual Information Statement (AIS)

TDS - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 AAAPA1234A (Kuldeep C) All values are in INR unless specified Data Updated as On 06-05-2021

Part A - General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B Feedback Status:  Submitted  Partially Submitted

TDS/TCS Information SFT Information Payment of Taxes Demand and Refund Other Information

Part B1- Information relating to Tax deducted/collected at source (Values in INR) 

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
▼  Dividend	TDS-194	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	02	Amount Paid / Credited	70,000

Details   

Sr.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	Tax Deducted	Tax Deposited	Status	Feedback
1	Q1 (Apr- Jun)	04-Apr-2020	20,000	2,000	2,000	Active	
2	Q3 (Jan- Mar)	04-Mar-2021	50,000	5,000	5,000	Active	

SFT - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep C) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

Part A - General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B

Feedback Status: Submitted Partially Submitted

TDS/TCS Information SFT Information Payment of Taxes Demand and Refund Other Information

Part B2- Information relating to Specified Financial Transactions (Values in INR) Filter

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
Dividend	SFT-015	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	01	Total Dividend Amount	74,000 (73,000)

Details Filter Bulk Feedback Download

Sr. No	Reported On	Dividend Amount	Status	Feedback
1	05-May-2021	74,000 (73,000)	Active	Information is not fully correct

Note: The information value after feedback is also shown separately (in brackets)

Taxpayer Information Summary (TIS)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep Choudhary) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number XXXX XXXX 9323	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Ctrl Download

Tax Information Summary (TIS)

Information Category	Processed Value	Derived Value
Salary	15,00,000	15,00,000
Rent received	3,80,000	2,80,000
Dividend	74,000	73,000

Details Filter Download

Part	Information Description	Information Source	Amount Description	Amount
				Reported Processed Derived
SFT	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	Total Dividend Amount	74,000 74,000 73,000
TDS/ TCS	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	Amount Paid/ Credited	70,000 - -

Note: The derived information in TIS is reduced after considering taxpayer feedback. This information will be used for prefilling.

Illustration 3: Display of updation in information

If information is updated by submission of correction statement, the original transaction is marked as inactive and a new transaction vale is added in the view. If the reporting entity submits a correction statement (SFT-17) showing dividend income as 73,000, the same is added as a new transaction.

Annual Information Statement (AIS)

TDS - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 AAAPA1234A (Kuldeep C) All values are in INR unless specified Data Updated as On 06-05-2021

Part A - General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B Feedback Status:  Submitted  Partially Submitted

TDS/TCS Information SFT Information Payment of Taxes Demand and Refund Other Information

Part B1- Information relating to Tax deducted/collected at source (Values in INR) 

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
▼  Dividend	TDS-194	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	02	Amount Paid / Credited	70,000

Details    

Sr.No	Quarter	Date of Payment/Credit	Amount Paid/Credited	Tax Deducted	Tax Deposited	Status	Feedback
1	Q1 (Apr- Jun)	04-Apr-2020	20,000	2,000	2,000	Active	
2	Q3 (Jan- Mar)	04-Mar-2021	50,000	5,000	5,000	Active	

SFT - Information source (L2 level)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep C) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

Part A - General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Part B Feedback Status: Submitted Partially Submitted

TDS/TCS Information SFT Information Payment of Taxes Demand and Refund Other Information

Part B2- Information relating to Specified Financial Transactions (Values in INR) Filter

Information Category	Information Code	Information Description	Information Source	Count	Amount Description	Amount
Dividend	SFT-015	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	01	Total Dividend Amount	73,000

Details Filter Bulk Feedback

Sr. No	Reported On	Dividend Amount	Status	Feedback
1	05-Jul-2021	73,000	Active	Optional
2	05-May-2021	74,000 (73,000)	Inactive	Information is not fully correct

Note: The original transaction is marked as inactive

Taxpayer Information Summary (TIS)

Annual Information Statement

F.Y. 2020-21 ▾ AAAPA1234A (Kuldeep C) ▾

All values are in INR unless specified
Data Updated as On 06-05-2021

General Information F.Y. 2020-21

Permanent Account Number (PAN) AAAPA1234A	Aadhaar Number NA	Name of Assessee KULDEEP CHOUDHARY	Date of Birth 02-NOV-1996
Mobile Number 9999999999	E mail Address IDSS.LTI.test@gmail.com	Address 124,NANDLAL ROAD HATOD,HATOD,INDORE,453111,MADHYA PRADESH	

Tax Information Summary (TIS)

Information Category	Processed Value	Derived Value
> Salary	15,00,000	15,00,000
> Rent received	3,80,000	2,80,000
▼ Dividend	73,000	73,000

Details Filter

Part	Information Description	Information Source	Amount Description	Amount
				Reported Processed Derived
SFT	Dividend income (SFT-015)	PNS Ltd. (BBBCP4321B.AB345)	Total Dividend Amount	73,000 73,000 73,000
TDS/ TCS	Dividend received (Section 194)	PNS Ltd. (DELP12345H)	Amount Paid/ Credited	70,000 - -

Note: The processed and derived information in TIS is updated to reflect correction statement