

HOW TO APPOINT TAX AGENT IN SELF SERVICE PORTAL V1

A: Taxpayer appoints Tax Agent as following:

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

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A	Home	
20	Assignee Management	-
	Roles	
	Assignees	
	Tax Agent Assignment	
_		

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

signee Management/Tax Agent Assignment						
Tax Agent Roles and Assignee Details						
Tax Agent Roles	License Number	TIN	Taxpayer Name	Trade Name	Actions	
Tax_Agent_Admin					© 3	
Tax_Agent_Withholding_Tax					© 9	
Tax_Agent_PAYE					© 9	
Tax_Agent_Income_Tax					© 9	1
Tax_Agent_CGT					© 9	
Tax_Agent_Presumptive_Tax					© 3	1
Tax_Agent_VAT					© 9	
Tax_Agent_PAYE_On_Pension_Commutation_And_Lumpsum_Payment					© 9	1



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

Tax Agent R	oles and Assignee Details				
Tax Agent Ro	les	License Number	TIN	Taxpayer Name	Trade Nam
Tax_Agent_	New Tax Agent Assignee				
Tax_Agent_	License Number		2001672255	Tsano	Tsano
Tax_Agent_					
Tax_Agent_		ancel			
Tax_Agent_					
Tax_Agent_Pr	esumptive_Tax				
Tax_Agent_VA	λT				

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

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		_	Assigned Man	agement/Tax Agent Assignmer							
ł.	Home		Assignee Man	agement/Tax Agent Assignmen	t						
8	Assignee Management	^	Tax Agent R	Roles and Assignee Details							
	Roles										
	Assignees		Tax Agent R			TIN	Taxpayer Name	Trade Name	Action	IS	
	Tax Agent Assignment		Tax_Agent_4	New Tax Agent Assignee					۲	3	Q.
				License Number	TIN						-
8	Taxpayer Information	~	Tax_Agent_V	330002742	2001676110				٢	9	Q.
	Tax Return Management	~	Tax_Agent_F	Taxpayer Name	Trade Name				۲	9	Q.
			Tax_Agent_I	Makusha Enterprises	Makusha ECD				۲	I	Q.
5	Taxpayers Certificates	~	Tax_Agent_C						۲	3	Q.
3	Taxpayer Accounting	~			Back Create				0	•3	Q.
	Debt Management	~	Tax_Agent_F			-					2.
			Tax_Agent_V	AT					۲	3	Q.
8	Payments	ř	Tax_Agent_P/	AYE_On_Pension_Commutation_And	LLumpsum_Payment				۲	9	Q.
	Refund Management	~									
	Notifications										



8. Notification is sent to the Tax Agent for approval

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•	Home		Assignee Management/Tax Agent Assignment			Tax agent assig	nment request	t has beer	
•	Assignee Management	^	Tax Agent Roles and Assignee Details		1				
	Roles Assignees		Tax Agent Roles	License Number	TIN	Taxpayer Name	Trade Name	Actions	
	Tax Agent Assignment		Tax_Agent_Admin					0 3) <u>Q</u>
1 ≣	Taxpayer Information	~	Tax_Agent_Withholding_Tax					0 3) Q.
\$=]	Tax Return Management	~	Tax_Agent_PAYE) Q.
*	Taxpayers Certificates	~	Tax_Agent_Income_Tax) Q.
i9	Taxpayer Accounting	~	Tax_Agent_CGT Tax_Agent_Presumptive_Tax					0 5) Q.
z	Debt Management	~	Tax_Agent_VAT					0 3	
0	Payments	~	Tax_Agent_PAYE_On_Pension_Commutation_And_Lumpsum_Payment					0 3) Q.
	Refund Management	~							
¢.	Notifications								

B: Tax Agent approves the appointment as following:

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





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

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¢	Assignee Management	~	oraria			31	atus change bate				
Ξ	Taxpayer Information	^				-	= -				~
	Taxpayer Profile										
	Applications										
	Requests								Reset	Searc	h
	Drafts		Sear	rch Results							
3	Tax Return Management	~	Show	w/Hide +							
ŧ	Taxpayers Certificates	~	No.	Document Reference Number	Request Type	Direction	Submission Date	Status	Status Change Date	Actions	
8	Taxpayer Accounting	~	1	Eh629022024002821	Tax Agent Assignment Request	Received	29/02/2024	Submitted	29/02/2024 16:59		l.
ŀ	Debt Management	~	2	Eh629022024002791	Tax Agent Assignment Request	Received	29/02/2024	Approved	29/02/2024 11:08	Review	
3	Payments	~	3	Eh629022024002753	Tax Agent Assignment Request	Received	29/02/2024	Approved	29/02/2024 09:22	۲	
٥	Refund Management	~	4	Eh629022024002752	Tax Agent Assignment Request	Sent	29/02/2024	Approved	29/02/2024 09:14	۲	
L	Notifications		Total	Count: 4			Items per page	10 👻	Pagelofi <	< > :	>1
ŧ	Calendar										

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

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- <u>A</u>	SSP		E<		UA	T					2001676	5110	×.	Eng 👻	Д ⁴² Ј	M
A	Home		Taxpayer Registration	/Requests												
20	Assignee Management	~	Tax Agent Assignmen	t Request												
	Taxpayer Information	~	Module: Tax Agent Ma DRN: Eh62902202400			Submission Status: Subr	Date: 29/02	2/2024			00000021 r Name: Shir	ts				
5=	Tax Return Management	~	Application Type: Tax		Request	Status Chan				Trade N						
٠	Taxpayers Certificates	~	License Number			TIN					ayer Name					
ŕ٦	Taxpayer Accounting	~	330002742			20016761	110			Mal	xusha Enterpri	ses				
*	Debt Management	~	Assigned Role	Tax_Agent_In	come_Tax											
808	Payments	~													and the second second	
	Refund Management	~									Cancel		Reject	Арр	rove	
	Notifications															
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4. After approval of the request, the Tax Agent logs out of SSP, and logs back, then select the taxpayer TIN on the drop-down at the top right corner.

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	SSP		≍ UAT	ĺ	2001672267	ng 👻 🗳 💷
			Taxpayer Registration/Requests		2001674866	
•	Home				800000089	
20	Assignee Management	~	Search Parameters		1001125744	^
	Taxpayer Information	~	Parameters ~		2001676110	
	Taxpayer Profile				2001676006	
	Applications		Document Reference Number	Request Type	20010/0000	-
	Requests		Direction	Submission Date		
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(s=)	Tax Return Management	~	· · · · · · · · · · · · · · · · · · ·	—		~
	Taxpayers Certificates	~				
49	Taxpayer Accounting				Reset	Search
10		ř			Reset	Search
2	Debt Management	~	Search Results			
	Payments	~				
PE	Refund Management	~	Show/Hide ~			
	Notifications		No. Document Reference Number Request Type Direction	Submission Date Status	Status Change Date	Actions
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While in the selected taxpayer's TIN, the Tax Agent can go to Assignee
Management, Tax Agent Assignment to check the tax types that the Tax Agent has

been assigned by the taxpayer.

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	Home		Assignee Managem	nent/Tax Agent Assig	nment			
20	Assignee Management	^	Tax Agent Roles	and Assignee Details				
	Tax Agent Assignees		Tax Agent Roles	License Number	TIN	Taxpayer Name	Trade Name	Actions
	Taxpayer Information	~	Tax_Agent_CGT	330002734	2001676109	Vhirozho Enterprises		09



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

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	Home	Assignee Management / Tax Agent Assignees	+ New Assignee
20	Assignee Management	Search Parameters	^
	Tax Agent Assignees	New Tax Agent Assignee	
	Tax Agent Assignment	License Number	
	Taxpayer Information		
\$=	Tax Return Management 🗸 🗸	Cancel	•
*	Taxpayers Certificates		
ŕ٦	Taxpayer Accounting 🗸 🗸	*	

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

C. Termination of Tax Agent Roles by the Tax Agent

1. The Tax Agent logs into SSP and select TaxnAgent TIN

2. Click on **Taxpayer Information**, then **Taxpayer Profile**, and click on **Tax Agent Activity** tab

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•	Home	Ta	axpayer P	rofile					
.	Assignee Management	~	k p	Business Details	Branches	Authorized Pe	ersons Tax	Agent Activity	History
∎≡	Taxpayer Information	^	Tax Agen	t Status					
	Taxpayer Profile		Active						
	Applications		License N	lumber	Issue	Date	Ex	piry Date	
	Requests		330002	734	29/0	2/2024	(01/03/2026	
\$=	Drafts Tax Return Management		Tax Agen	t License Certificate			License Renew	Change	Tax Agent Status
	Tax Return Management	~		TIN	—	Territoria	Oto at data	E. J. D. M.	A
*	Taxpayers Certificates	~	No.	IIN	Taxpayer Name	Tax Agent Role	Start date	End Date	Action
ر ا ا	Taxpayer Accounting	~	1	2001676110	Makusha Enterprises	Tax_Agent_CGT	29/02/2024 09:14	4	<u>*</u> -
			2	0001670001	Dhana	Tour A cont DAVE	00/00/0004 00.1	00/00/0004	



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

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

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

		Cancel	Submit

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

11	Termination Request For:
Return	The Request for Termination of Authority to Represent the Taxpayer of Makusha Enterprises with application reference number Eh729022024002823 is successfully Submitted
bayers	
bayer .	Ok
t Mana	igement VENENELE



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

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

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		Тахрау	yer Registration/Requests						
Home									_
Assignee Management	~							Reset	Search
Taxpayer Information	^	Sea	irch Results						
Taxpayer Profile									
Applications		Sho	w/Hide	•					
Requests		No.	Document Reference Number	Request Type	Direction	Submission Date	Status	Status Change Date	Actions
Drafts		1	Eh729022024002823	Request for Termination of Authority to Represent the Taxpayer	Received	29/02/2024	Submitted	29/02/2024 17:33	≗ ⊚
Tax Return Management	~	2	Eh629022024002821	Tax Agent Assignment Request	Received	29/02/2024	Submitted	29/02/2024 16:59	Review
Taxpayers Certificates	~	3	Eh629022024002791	Tax Agent Assignment Request	Received	29/02/2024	Approved	29/02/2024 11:08	۲
Taxpayer Accounting	~	4	Eh629022024002753	Tax Agent Assignment Request	Received	29/02/2024	Approved	29/02/2024 09:22	۲
Debt Management	~	5	Eh629022024002752	Tax Agent Assignment Request	Sent	29/02/2024	Approved	29/02/2024 09:14	۲
Payments	~	Tota	al Count: 5			Items per page 10	▼ Page	e1of1 < <	> >
Refund Management	~								

b. The approval or rejection is done here:

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🛒 SSP			UAT	2001676110 -	Eng - 🖓 JM
Aome		Taxpayer Registration / Requests			
Assignee Management	~	License Number	TIN	Taxpayer Name	
Taxpayer Information	~	330002734	2001676109	Vhirozho Enterprises	
S Tax Return Management	~	Termination Request For:			
Taxpayers Certificates	~				
Taxpayer Accounting	~	TIN	Taxpayer Name	Assigned Role	
st Debt Management	~	2001676110	Makusha Enterprises	Tax_Agent_CGT	
Payments	~	Termination Reason *			
Refund Management	~				teheheje
Notifications					
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Type here to search		H 🤻 🚑 🖻 🗖 🖻	lê 💷 🖥 🍯 🗭 🔒 🕅	🗐 🙆 ^ 📥 <i>(i</i> , dv)	ENG 29/2/2024 33

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



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

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

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Home		Assignee Management/Tax /	Agent Assignment							
Assignee Management	^	Tax Agent Roles and Assi	gnee Details							
Roles										
Assignees		Tax Agent Roles			License Number	TIN	Taxpayer Name	Trade Name	Actions	5
Tax Agent Assignment		Tax_Agent_Admin							•	9 Q.
Taxpayer Information	~	Tax_Agent_Withholding_Tax							0	9 Q.
Tax Return Management	~	Tax_Agent_PAYE							© *	<u>୭</u> ହ
Taxpayers Certificates	~	Tax_Agent_Income_Tax								9 Q.
Taxpayer Accounting	~	Tax_Agent_CGT			330002734	2001676109	Vhirozho Enterprises			୭ ହ- ୦ ୦
Debt Management	~	Tax_Agent_Presumptive_Tax Tax_Agent_VAT								ල දං ල දං
Payments	~	Tax_Agent_PAYE_On_Pension	Commutation And Lum	npsum Payment						5 A
Refund Management	~									
Notifications										

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

1	SSP		≡< UA	Т		2001676	110 👻	Eng 👻	4	42 J
•	Home		Assignee Management/Tax Agent Assignment						-	
0	Assignee Management	~	Tax Agent Roles and Assignee Details							
	Roles									
	Assignees		Tax Agent Roles	License Number	TIN	Taxpayer Name	Trade Name	Action	ns	
	Tax Agent Assignment		Tax_Agent_Admin					۲	3	Q.
8	Taxpayer Information	v	Tax_Agent_Withholding_Tax					0	9	Q.
3	Tax Return Management	~	Tax_Agent_PAYE					۲	3	Q.
i.	Taxpayers Certificates		Tax_Agent_Income_Tax					0	3	Q.
			Tax_Agent_CGT	330002734	2001676109	Vhirozho Enterprises		۲	3	Q-
9	Taxpayer Accounting	~	Tax_Agent_Presumptive_Tax					Remov	e Tax	Agent
ŀ	Debt Management	~	Tax_Agent_VAT					۲	9	Q.
3	Payments	~	Tax_Agent_PAYE_On_Pension_Commutation_And_Lump	sum_Payment				0	Ð	Q.
	Refund Management	~								
	Notifications	- 1								



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

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Home		Assignee Management/Tax Agent	t Assignment						
Assignee Management	~	Tax Agent Roles and Assignee	Details						
Roles									
Assignees		Tax Agent Roles		License Number	TIN	Taxpayer Name	Trade Name	Actions	
Tax Agent Assignment		Tax_Agent_Admin		_				0	9 Q.
Taxpayer Information	~	Tax_Agent_Withhc Are yo	u sure you want to remove the tax agent	assignee?				0	9 Q
Tax Return Management	~	Tax_Agent_PAYE		- 1				0 5	
Taxpayers Certificates	~	Tax_Agent_Incom	Yes No	330002734	2001676109	Vhirozho Enterprises		0 5	
Taxpayer Accounting	~	Tax_Agent_Presumptive_Tax		330002734	2001070109	vnirozno Enterprises) A
Debt Management	~	Tax_Agent_VAT						0	9 Q
Payments	×	Tax_Agent_PAYE_On_Pension_Com	mutation_And_Lumpsum_Payment					0	9 Q.
Refund Management	~								
Notifications									

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

