

iTAX: Service Levy User's Manual





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1 INTRODUCTION

iTAX or Integrated Taxation Management System is an integrated software composed of several modules that individually accommodate the procedures that signify each of the local government offices.

iTAX provides a Service Levy Module for the use by the LGA for registering corporate entities and collecting Service levies using this information.

2 OVERVIEW

Service Levy is charged and collected by Local Government Authorities. This turnover based levy is payable in quarterly by corporate entities carrying on business in the respective Local Government Authority. The rate of tax is currently 0.3 per cent of the business turnover.

Service Levy is a module in the **iTAX** software application that automates most of the processes and transactions related to revenue collection of Service Levy. This module is linked to other modules in the **iTAX** software which enables it to utilize the common functions that handle taxpayer data, accounting, payments, enforcements, and reports.

The Service Levy module provides the functionalities that allow the LGA or the user to process transactions regarding the Service Levy. The module also provides analysis of estimated income from Service Levy.

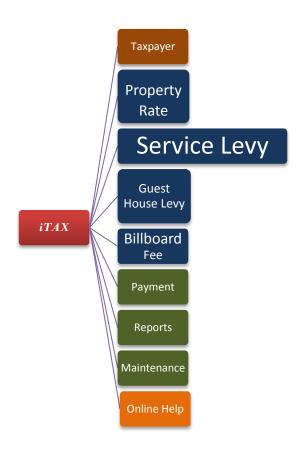


Figure 1 – Service Levy

Figure 1 illustrates the structure of the iTAX application with Service Levy as the module under focus. Also shown are other support modules such as Reports and Maintenance that provide common services. Online Help is additional function in the software where you can seek help from Internet. The table below summarizes the features, transactions and reports of the Service Levy module.

FEATURES	
	1. Record all data items on corporate entities.
	2. Declare a corporate entities monthly/quarterly/annual income.
	3. Issue a receipt for Service Levy payment
	Accept full, partial and advance payments
TRANSACTIONS	
	1. Create, edit and delete a corporate entity information
	2. Add, edit and delete business activity information
	3. Compute penalties/interests
REPORTS/DISPLAYS	
	1. List of corporate entities
	2. Service Levy due bill
	3. General Abstract of collections
	4. Collection Report

Figure 2 – Service Levy module features, transaction and reports

3 SERVICE LEVY MODULE

The Service Levy module has two windows for the management of revenue collections. The first window is the Service Levy Entry window that allows the registration and management of corporate entities information. The second window carters for service levy declaration and debit posting processes.

To access the Service Levy module go to the FEES/LEVIES Menu > Service Levy (SL) >SL Entry.



Figure 3 – Service Levy Entry Menu

The Service Levy Entry window will display.	The S	ervice	Levv	Entry	window	will	display	
---	-------	--------	------	-------	--------	------	---------	--

Service Levy			
*TRADING NAME :	Date Closed:		Search
Taxpayer Detail OWNER : TRA TIN: "Name: Category: Is business's premises rented? LAND LORD : TRA TIN: Name: Location District: Ward: Plot No.: *Registration Certificate No *Mode of Paymen *Annual Turnove	nt:	00/00/0000 00/00/0000 00/00/0000 00/00 00000 00000 00000 0000 00000 00000 00000 0000000 00000 0	New Edit Delete Close Record Save Cancel Print Post Debit Close
Detail : Business Activity Directors/Partners Business Activity Name •		Add Row Delete Row	

Figure 4 – Service Levy Entry window

3.1 Searching Service Levy information

1. In the Service Levy Entry window, click the SEARCH button to locate a certain corporate entity. The Service Levy Search window (Figure 5) will display.

s	ERVICE	LEVY SEARCH			1		23
	Criteria	:				(Search
		ID:		Reg. Cert No.:			Clear
		Name: Owner:		Cert. Date: 0 Annual Tunrover:	.00	(Print List
	Ca	tegory:	•			[Cancel
	Result :					U	Return
	ID	Trade Name	Annual Turnover	Owner Name	Taxpayer Category	Registration Certificate No.	License Numbe
	25	M-PESA TRADER	89,000,000.00	Zinganisa, Atiki	Limited Company	REG123	LIC123
	32	GUEST HOUSE EDIT	45,000,000.00	Mtanda, Abdalla	Partnership	GST12	ST2312
	33	TEST	50,500,000.00	Woga, Ahmadi	Parastatal	TST1	TES2
	34	ISTORE		Chidwadwa, Issa	Other	CERT212	LIC4312
	35	ASDESADE		EDITEDXXXX, XXXXX XX	Club	SDF234234	CV234234
	36	POLO HOTEL		DELA CRUZ, JUAN	Club	RG123	LIC321
	23	DAVIDSON MOTOR		Davidson , Evie	Government Agency	RC123	LIC123
	24	GIZ-SULGO	150,000,000.00	Jimajima, Mussa	Government Agency	R1234	L1234
	•						F.

Figure 5 – Service Levy Search window

- 2. Retrieve the desired corporate entity information from the Service Levy Search window by typing in the information that determines corporate entity. You may be able to search for a corporate entity by typing the information in any of the given columns.
- 3. Select the corporate entity you wish to view, click RETURN button.
- 4. The Service Levy Entry window (Figure 6) will be populated with the retrieved information.

*TRADING NAME : MASSAWE & SONS CO LTD	Date Closed:		Search
Taxpayer Detail OWNER : TRA TIN: TRA TI	*Registration Date: *Certificate Date: *License Date: Last Financial Year: *From: *To: License Number: 4 *No. of Employees: *Registration Certificate No.: 45645 *Mode of Payment: QUARTERLY *Annual Turnover: TSh	01/01/2013 01/01/2013 2012 2013 35346543 30 9999,999,999.999	New Edit Delete Close Recc Save Cancel Print Post Deb Close
etail :		Add Row Delete Row	

Figure 6 – Service Levy Entry window

3.2 Entering Service Levy information

- 1. In the Service Levy Entry window, click the NEW button to get a blank Service Levy Entry form.
- 2. Enter corporate entity information and taxpayer details.
- 3. Enter business premises information.
- 4. Enter location information.
- 5. Enter business activity details in the tab control at the bottom of the screen.
- 6. Enter the rest of the information ensuring that all required fields are filled (required fields are in red and marked with an asterisk).
- 7. Click SAVE button when you are done.

3.3 Entering Service Levy information when Business License Registration is mandatory

The LGA has the option to make registration for Business Licenses mandatory before any Service Levy can be collected. This option is set in MAINTENANCE > SYSTEM VARIABLES by an administrator:

			2	1
	Description		Tag Value	
SINESS LICENSE		Concernance Manager		Theorem
and the second se	ice Levy and Guest House Levy must have			BUS
Last day of busin	ess registration. (dd/mm)	31/07		BPL
HIER				
C		MEC	1	~~~
Tag Group :				
ing droup i	BUSINESS LICENSE		-	
a de Transie d'Arres	BUSINESS_MANDATORY_BV		•	
Tag:		e Levy must have Bus	•	
Tag:	BUSINESS_MANDATORY_BV Records for Service Levy and Guest Hous	e Levy must have Bus	•	

Figure 7 – Setting Business License registration as mandatory

Once the system variable is set, the behaviour of the NEW button as well as the fields will change in the Service Levy window. To enter new data:

- 1. Click the NEW button. The SEARCH BUSINESS window will open in order for the user to select the business liable for the Service Levy.
- 2. Search and select the business then click RETURN.
- 3. Since the Service Levy is now basing its information on a registered business most of the fields will be auto-filled and disabled.

*TRADING NAME : DOCTOR MACHIPS	Date Closed:	Search
Taxpayer Detail OWNER : TIN: Name:	Registration Date: 00/00/0000 Certificate Date: 00/00/0000 License Date: 00/00/0000	New Edit Delete
Is business's premises rented?	Last Finandial Year: "From: 00/00/0000 " "To: 00/00/0000 Business Number: HMD/BL/00127	Close Rec Save Cancel
Name: Location District: Bukombe PO Box: Ward: Dodoma Makulu V Plot No.: Mtaa: Arkalia	Registration Certificate No.: "Payment Period: "Annual Turnover: TSh .00	Print Post Deb Close
tail : usiness Activity Directors/Partners Business Activity Nan	ne Add Bow	

Figure 8 – The entry form with some fields filled with the Business's information and disabled.

- 4. Enter business activity details in the tab control at the bottom of the screen.
- 5. Enter the rest of the information ensuring that all required fields are filled (required fields are in red and marked with an asterisk).
- 6. Click SAVE button when you are done.

3.4 Editing Service Levy information

- 1. Use the search instruction in section 3.1 above to locate a specific corporate entity for editing.
- 2. Click the EDIT button to start editing corporate entity information stored in the database.
- 3. Click SAVE button when you are done with editing.
- 4. Click the CLOSE button to end the editing session.

3.5 Printing Service Levy Registration information

- 1. Use the search instruction in section 3.1 above to locate a specific corporate entity.
- 2. Click the PRINT button.

3.6 Service Levy Debit Posting

To access the Service Levy Debit Posting function go to the FEES/LEVIES Menu >Service Levy (SL) >SL Declaration.

😐 iTAX - Ir	tegrated Taxati	on Manager	nent Syster	m				
Taxpayer	Property Rate	Fees/Levies	iWater	Payment	Reports	Maintenance	Window	Help
Property	Billboard Ser	Guesth	rd Fee Levy (SL) ouse Levy Payments	•	SL Entry SL Declara	ation ×		

Figure 9 – Service Levy Declaration Menu

The Service Levy Debit Posting window will display.

	Trade Name		ear: 2013					
43 46	TEST PPTL	-	Month Declared	Gross Sales for the month	0.3% of Gross Sales	Penalty	Total	Retrieve
47	PRASHANT		January	501,009,008.00	1,503,027.02	60,121.08	1,563,148.10	
48	MASSAWE & SONS CO LTD	i i i i	January	501,009,008.00	1,503,027.02	60,121.08	1,563,148.10	Add
49	BEAUTIFULLY ONYINYE	i i i i	February	501,009,008.00		30,060.54	1,533,087.56	Edit
50 51	KAJIMA NICHOLAS	F	March	501,009,008.00			1,503,027.02	Cancel
1	TEST	F	April	501,009,008.00	1,503,027.02	(30,060.54)	1,472,966.48	
		F	May	501,009,008.00	1,503,027.02	(60,121.08)	1,442,905.94	Save
		F	June	501,009,008.00	1,503,027.02	(90,181.62)	1,412,845.40	Post
			July	501,009,008.00	1,503,027.02	(120,242.16)	1,382,784.86	Close
		F	August	501,009,008.00	1,503,027.02	(150,302.70)	1,352,724.32	
			September	501,009,008.00	1,503,027.02	(180,363.24)	1,322,663.78	
		F	October	501,009,008.00	1,503,027.02	(210,423.78)	1,292,603.24	
			November	501,009,008.00	1,503,027.02	(240,484.32)	1,262,542.70	
		Ē	December	501,009,008.00	1,503,027.02	(270,544.86)	1,232,482.16	

Figure 10 – Service Levy Debit Posting window

- 1. Select the year from the dropdown list and then click the RETRIEVE button. The system populates the window fields with information stored in the database.
- 2. Select the Trade Name of the taxpayer from the left pane.
- 3. Select the month you want to process and click the POST button. If posting is successful, a confirmation message is displayed.

4 REPORTS MODULE

In the iTAX application reports are grouped together under the Reports Module. Reports that use data generated by the Service Levy module are General Abstract of Collections and Collection Report. These reports are described in the sections below

4.1 General Abstract of Collections

To access the General Abstract of Collections report go to REPORTS Menu > COLLECTION / PAYMENT > GENERAL ABSTRACT OF COLLECTIONS.

Select Report:	Quarterly	1st Quarte	er	•	2013						Retrieve	Print C	llose		
	Abstract of Collection														
	the 1st Quarter of 2														
yment Dat		Receipt No.	Crop	us sts (Crop Cro		ouse Ba	skty u:	king feards	erty,	Crop	Service Levy	icen	s produ	Grand Total
26/03/2013	FRANK, JACOB KAJIGILI					00.00									80,000.00
		123										27,780	.00		27,780.00
	KINYAMAGOHA, ISMAIL										000.00				5,000.00
		1235							00.0						13,500,000.00
		125							00.0)					500,000.00
	MASSAWE, JOHN B.	456567												.000.00	500,000.00
		4567							00.0						480,000.00
		8765							00.0						80,000.00
		987654							00.0			834,400	.00		1,668,800.00
	MTELEWA	1234							00.0						100,800,000.00
		234							00.0)					16,800,000.00
		5588	C	00.00											2,000.00
		6666										1,000,000	.00		1,000,000.00
	nicholas	00987										57,420	00		57,420.00
		1234							00.00						80,000.00
		2345										62,400	00		62,400.00
		23456							0.0	0					0.00
8/03/2013	Woga, Ahmadi	10223							00.0)					9,000.00
		2345432)0	0.00		00.0)					270,000.00
		876543456)1	0.00		10.0)					1,744,020.00
		8765456765							00.0)					900.00
		876567876				79	0.00		90.0)					77,580.00
Grand Tota	1		8.00)	0.0012	.00.2.00	0 00.00 0	0.0000.0	00.00	00.00)9.0	0.00	00.00	2,559,745.	2777.0	00.00	526,352,943.27

Figure 11 – General Abstract of Collections window

- 1. Select the type of report you wish to have, Quarterly or Monthly.
- 2. Click the month or quarter you wish to view depending on the above selection.
- 3. Select the year and then click RETRIEVE button.
- 4. Make sure to set the appropriate Print size and format before clicking the PRINT button.
- 5. To exit from the window, click the CLOSE button.

4.2 Collection Report

To access the Collection Report go to REPORTS Menu > COLLECTION / PAYMENT > COLLECTION REPORT.

COLLECTION REPORT District of MTWARA MIKINDANI Name: Service Levy Period: 1st Quarter, 2013 Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 OR No.: 5624 PAID BY: a 290,3 09050222101231232, [2013] adobe REG Service Levy 290,3 09050222101231232, [2013] REG Service Levy 156,0
COLLECTION REPORT District of MTWARA MIKINDANI Name: Service Levy Period: 1st Quarter, 2013 Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date : 3/26/2013 OR No.: 5624 PAID BY : 2 Og0-522-752246-2 Og0050222101231232, [2013] adobe REG Service Levy 290,3
District of MTWARA MIKINDANI Name: Service Levy Period: 1st Quarter, 2013 Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 PAID BY: 2 090-522-752246-2 0905022101231232, [2013] adobe REG Service Levy 290,3
District of MTWARA MIKINDANI Name: Service Levy Period: 1st Quarter, 2013 Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 PAID BY: 2 090-522-752246-2 0905022101231232, [2013] adobe REG Service Levy 290,3
District of MTWARA MIKINDANI Name: Service Levy Period: 1st Quarter, 2013 Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 PAID BY: z DR No.: 5524 PAID BY: 290,32
Name: Service Levy Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 DR No.:5524 D900-522-752246-2 09050222101231232. [2013] adobe REG Service Levy 290,3
Name: Service Levy Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013 DR No. : 5624 Dig0-522-752246-2 00050222101231232. [2013] adobe REG Service Levy 290,3
Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013
Officer: Demo Admin Local TIN Identifier(PRN, Bus#) Taxpayer Type Tax Type Amoun Date: 3/26/2013
Date: 3/26/2013 PAID BY : a DOR No. : 5624 PAID BY : a 290,3 D90-522-752246-2 09050222101231232, [2013] adobe REG Service Levy 290,3
PAID BY : a PAID BY : a 90-522-752246-2 09050222101231232, [2013] adobe REG Service Levy 290,3
PAID BY : a PAID BY : a 90-522-752246-2 09050222101231232, [2013] adobe REG Service Levy 290,3
09050222101231232, [2013] REG Service Levy 156,0
09050222101231232, [2013] REG Service Levy 131,3
577,74
OR No. : 2345 PAID BY : nic
090-522-752251-5 09050222101231232, [2013] nicholas REG Service Levy 31,2
09050222101231232, [2013] REG Service Levy 31,2
62.40
02,+4 DR No.:00987 PAID BY: nic
090-522-752251-5 09050222101231232, [2013] nicholas REG Service Levy 36,0
09050222101231232, [2013] REG Service Levy 21,4

Figure 12 – Collection Report window

- 1. Select the type of report you wish to have, Quarterly or Monthly.
- 2. Click the month or quarter you wish to view depending on the above selection.
- 3. Select the year and the tax type. If by "tax type" is selected, then select the tax type from the tax type dropdown box.
- 4. Click the GENERATE button to display the report.
- 5. Make sure to set the appropriate Print size and format before clicking the PRINT button.
- 6. To exit from the window, click the CLOSE button.

4.3 List of Businesses

To access the List of Businesses Report go to REPORTS Menu > SERVICE LEVY > LIST OF BUSINESSES.

‡l					6		F
	List of Busine	sses Registere	d for Servi	ice Levy R	eport		
Business Trade Name	Owner Name	Category	PO Box	Mtaa	Ward	License Number	- <u>1</u>
TEST	CERVANTES, CHRISTOPHE	n club	1	Bahi Road	Chikongola	123213213	
MASSAWE & SONS CO LTD		Limited Company	4353453	AICC	Chikongola	435346543	
TEST	Mnauka, Fatumu	Parastatal	test	Ligula 'A'	Chuno	2	E
KAJIMA	FRANK, JACOB KAJIGILI	Partnership	719	Endonet	Jangwani	02	E,
NICHOLAS	nicholas	Government Agency	1212	Magadini Wiri g		013256	E
PPTL	MTELEWA	Limited Company	178	Ahakishaka	Maweni	100200	E
BEAUTIFULLY ONYINYE	adobe	Club	112	Kijiweni	Shangani	203	F
PRASHANT	KINYAMAGOHA, ISMAILY L	UISole Proprietor	92	Kisiwani	Shangani	16	E
							· · · · · · · · · · · · · · · · · · ·

Figure 13 – Collection Report window

- 1. Make sure to set the appropriate Print size and format before clicking the PRINT button.
- 2. To exit from the window, click the CLOSE button.

5 ACCRONYMS AND ABBREVIATIONS

GFA	GFA Consulting Group GmbH, Hamburg, Germany	
GIZ/GTZ	German Development Cooperation, Eschborn, Germany	
iTAX	Integrated Tax Management System	
LGA	Local Government Authority	
TIN	Taxpayer Identification Number	