eTIS-1 FUNCTIONAL TRAINING FOR END USERS

TAXPAYER REGISTRATION SYSTEM

MASTER TRAINER GUIDE

Document History

VERSION	DATE	OWNER	DETAILS
0.1 Draft	September 2014	Grace Guintu, INDRA	INDRA Initial Draft
0.2 Draft	September 25, 2014	Aimee Salo, AARC-WYG (CMT)	Initial enhancement
0.3 Draft	October 07, 2014	Aimee Salo, AARC-WYG (CMT)	Secondary enhancement
0.4 Draft	October 08, 2014	Dexter Demoral, AARC-WYG (CMT)	Review

Note: *This section is just for reference purposes only and should not be printed as part of the final document.*

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Introduction

The eTIS-1 (Electronic Tax Information System) Instructor Guide provides you will all the tools, processes and information that you'll need in order to deliver a successful eTIS Functional Training for End Users.

This document contains the following sections:

- **Training Administration Guide.** Provides you with the necessary information, processes and tools that you will need to prepare before the training and complete post-training administration work.
- **Facilitator Guide / Instructor Guide.** Your one-stop ultimate reference guide to deliver a successful training. The instructor guide contains presentation slide references, scripts, links to make your delivery smooth and easy. This guide is created to ensure that key messages and salient points are delivered consistently across different classes, taking into consideration adult learning principles.
    - **Facilitator Guide / Instructor Guide – Full Training**
    - **Facilitator Guide / Instructor Guide – Approvers Training**
- **Presentation Slides.** This guide also contains the presentation slides so that you can easily review your PowerPoint Slides even without access to a computer.
- **Appendix.** The appendix section provides you with supplementary materials that you can use to deliver some sections of the training (i.e. energizers, ice-breakers, wrap-up activity…etc.)

You may hold this guide while you are facilitating your first few sessions and as you gain more confidence with regard to the structure and flow of training, the facilitator guide may then serve as a reference.

TRAINING ADMINISTRATION GUIDE

TAXPAYER REGISTRATION SYSTEM

Training Administration Guide

Before you begin with you training session, there are a few important reminders that you have to remember to ensure smooth delivery of training. This section outlines the activities that you need to prepare and complete before and after the training.

OVERALL TRAINING APPROACH

The eTIS-1 Training Delivery approach is Instructor-Led Training (ILT). This means that training shall be delivered by a facilitator throughout the session. Training administration and assessments shall be done online through a class management tool called Quia.

TRAINING DELIVERY PRINCIPLE

The design of the training and materials is anchored on adult learning principles. Activities are embedded throughout the training to allow participants to engage and reflect about the new system. Hands-on exercises are also critical in this training so make sure to follow the general guidelines below.

- **Present and discuss the topic.** Before engaging in any hands-on activity, make sure to discuss the topic/functionality, its purpose and what it can do.
- **Demonstrate.** Always demonstrate first how a particular step, task or process is completed before allowing your participants to do it on their own.
- **Guided Practice.** Have participants demonstrate how to complete a particular step, task or process while providing feedback and guidance.
- **Independent Practice.** Have participants apply learning through independent practice.
- **Checking for Understanding.** Always check for understanding by asking questions or by allowing them to ask questions. An end of course assessment (test) will be administered at the end of training to check participants understanding.

PRE-TRAINING GUIDELINES & PREPARATION

- Each eTIS Training class shall have a minimum of 15 and maximum of 25 participants. Each class shall be facilitated by two (2) Master Trainers for a class size of 15, and an additional facilitator for every 6-10 additional participants.

- The Functional Training for End Users – Taxpayer Registration System training has three (3) different courses based on user groups.

    - **Functional Training for End Users – Taxpayer Registration System (Approvers).** This is a 3 day course targeted to users who utilize the system to approve or decline tasks. This is a full training with focus practice on approving of tasks.

    - **Functional Training for End Users – Taxpayer Registration System (Full Training)**. This is a 3 day course targeted to users who utilize the system for day-to-day transactions.

- Make sure to confirm class details from TDD (Training Delivery Division). Get schedule information, training to be delivered (inquiry, approval or full training), location, number of participants, training attendance roster and your role (lead facilitator vs. co-facilitator) at least one week before the scheduled class.

- Review the instructor guide, course outlines and presentation slides. For changes, you will be notified via email of any changes in the documents.

- You will be using the training environment to demonstrate how to use the system. Make sure that you have the eTIS-1 RFP Training URL and training logins with you. Though this will be provided to you before your training, make sure to contact TDD if you do not have this information.

    - Confirm with TDD if all materials have been delivered to the venue.

    - You will be using an online tool to administer all surveys and assessments. Make sure that you have all the URL available prior to your training. The URLs for all surveys and assessments are indicated on the main instructor guide.

    - Prepare all the materials that you'll need. All training materials will be provided by TDD. A checklist is provided in this section for your reference.

    - Make sure to take enough rest before the day of the training.

DURING THE TRAINING

- Arrive at the venue at least 30 minutes before the scheduled training. This allows you to relax and at the same time, check the equipment and venue layout. Check the following items:

    - **Desktop or Laptop Computers with access to the internet.** The total # of units should be equal or more than the expected number of participants to attend.

    - **Training Manuals.** End users shall be provided an End User Guide and Participant Guide. This should also be equal to the number of participants to attend the class.

    - **Two Projectors and Screen.** Each class will have two projectors. One will be used to project the presentation slides, while the other one will be used to project the eTIS Training environment. This makes it less confusing for you and your participants rather than toggling between your presentation and training system.

    - **Food.** Food shall be provided during the training. There will be two (2) snacks and (1) lunch. Personnel from the facility may confirm with you when the food shall be brought to the assigned place.

    - **Markers and Flipchart Paper.** Make sure that you have enough flipchart papers and markers throughout the day.

- **Attendance Roster.** Do not forget to have everyone sign the attendance roster. Capture the time-in. Keep the attendance roster as you will need to encode the attendance sheet on the last day of training. Take note of late instances post breaks and lunch.

  On the last day of training, you have to encode the attendance into Quia. Please follow the instructions follow below:

    - Step 1: Access the online attendance sheet using this link: http://www.quia.com/sv/680587.html
    - Step 2: Select the Course Title and Batch
    - Step 3: Enter start and end day of training. Make sure to follow the format. (Example: 10/20/2014)
    - Step 4: Enter the name of the training venue. This will be provided to you ahead of time.
    - Step 5: Enter the course start and end date of training.
    - Step 6: Enter name of participant following the format Last Name, First Name
    - Step 7: Select the division of the participant
    - Step 8: Select whether participant was present on Day 1 to Day 4
    - Step 9: If the participant was absent, kindly put reason for absence
    - Step 10: Repeat Step 6 until all participants have been encoded

- Before the first break, kindly send the following information to nora.tembrevilla@bir.gov.ph, carmencita.demesa@bir.gov.ph, maria.luisa.perez@bir.gov.ph, amariano@etischange.com and ddemoral@etischange.com.

  - Total # of staff present
  - Total # of staff scheduled
  - Attendance % (Total # of staff present vs. Total # of staff scheduled)
  - Names of those absent with division and reason for absence

- **Roles & Responsibilities.** Make sure that you have discussed with your co-facilitator roles & responsibilities to ensure smooth training flow. Below are the responsibilities assigned to each role:

  - Lead Facilitator.
    - Owns the training session.
    - Delivers majority of the training session. At least 60% of the course.
    - Navigate the presentation slides (main projector)

  - Co-Facilitator.
    - Serves as back-up to the lead facilitator.
    - Deliver at least 25% of the course.
    - Navigate the training system (second projector)
    - Encode attendance in Quia
    - Document questions and answers from the participants
    - Provide post-training reports and escalate issues as necessary

- **Assessments.** All assessments shall be administered through Quia. The links are included in the main Instructor Guide.

- **Reporting of Issues.** Should you encounter any issues during the training, you may email the following contacts:

  - **Nora Tembrevilla**, **TDD, BIR** nora.tembrevilla@bir.gov.ph
  - **Ma. Luisa Perez, TDD, BIR** maria.luisa.perez@bir.gov.ph
  - **Carmencita "Che" De Mesa, TDD, BIR** carmencita.demesa@bir.gov.ph
  - **Alma Mariano, CMT, AARC-WYG** amariano@etischange.com
  - **Dexter Demoral, CMT, AARC-WYG** ddemoral@etischange.com

  - You may also call the following numbers 981-7496 (Change Management Team) or 928-0058 / 926/-5598 local 7406 to 07 (Training Delivery Division).

AFTER THE TRAINING

- Submit all attendance sheet / roster to TDD.
- Submit documented questions and answers to nora.tembrevilla@bir.gov.ph, maria.luisa.perez@bir.gov.ph, carmencita.demesa@bir.gov.ph, amariano@etischange.com and ddemoral@etischange.com
- If there are any unresolved issues or concerns, email such to the contacts above.

INSTRUCTOR GUIDE

TAXPAYER REGISTRATION SYSTEM

FULL & APPROVERS TRAINING

COURSE OUTLINE

Functional Training for End Users
Taxpayer Registration System (Transaction Processors I Full Training)

ACTIVITY	DUR (Min)
DAY ONE	
Registration	30
Opening Activity (Getting-to-Know Activity)	30
ADKAR Assessment	15
House Rules	5
Course Requirements	5
Objectives Setting	10
Course Agenda	5
First Break	15
What is eTIS?	5
eTIS vs. ITS	5
ETIS at a Glance	5
System Requirements	3
Input Hardware	2
Logging in / Out of the System	20
Changing Passwords	10
User Interface Familiarization	5
Taxpayer Registration Introduction	30
Primary Registration / Register Taxpayer TIN Issuance for Individual	50
Lunch	60
Primary Registration / Register Taxpayer TIN Issuance for Individual	120
Last Break	15
Primary Registration / Register Taxpayer TIN Issuance for Individual	55
Wrap-up	40
TOTAL MINUTES	**540**

ACTIVITY	DUR (Min)
DAY TWO	
Registration	30
Review Activity	30
Register Non-Individual	60
First Break	15
Register Non-Individual	120
Lunch	60
Register Non-Individual	90
Register Branch	30
Last Break	15
Register Branch	60
Wrap-up	30
TOTAL MINUTES	**540**

ACTIVITY	DUR (Min)
DAY THREE	
Registration	30
Review Activity	30
Register Branch	30
Register Facility	30
First Break	15
Register Facility	60
Manage Taxpayer - Find Taxpayer	15
Manage Taxpayer - Update Taxpayer	60
Manage Taxpayer - Suspend Tax	60
Lunch	60
Re-Activate Tax	45
Manage Taxpayer - De-Register Tax	60
Last Break	15
Wrap-up	30
TOTAL MINUTES	**540**

ACTIVITY	DUR (Min)
DAY FOUR	
Registration	30
Review Activity	30
Manage Taxpayer - Re-Register Tax	60
First Break	15
Manage Taxpayer - Transfer Taxpayer	60
Manage Taxpayer - Tag/Un-Tag Inactive Taxpayer	45
Lunch	60
Manage Financial Detail	60
Secondary Registration - Create Application for Authority to Print	60
Last Break	15
Secondary Registration - Create Application for Authority to Print	45
Correspondences	30
Wrap- up	30
TOTAL MINUTES	**540**

ACTIVITY	DUR (Min)
DAY FIVE	
Registration	30
Review Activity	30
Correspondences (cont'd)	30
Reports	30
First Break	15
Reports (cont'd)	75
Task Manager*	60
Lunch	60
Wrap-Up	60
Review	60
Assessment	60
Last Break	15
Training Satisfaction Survey & Closing	15
TOTAL MINUTES	**540**

**For Approvers Training Only*

eTIS-1 FUNCTIONAL TRAINING FOR ENDUSERS

Taxpayer Registration System (TRS)

COURSE OVERVIEW

The eTIS-1 Functional Training for End Users – Taxpayer Registration System (TRS) is a 5-day course for users who utilize the Taxpayer Registration System functionality. The course will provide participants with an understanding of the eTIS-1 functionalities, modules and sub-modules, navigational skills in order to register various types of taxpayers. It will also allow the users to do modifications on the taxpayer records when the need arises. Moreover, it will discuss on how to manage tasks within the Electronic Tax Information System 1 (eTIS-1) and how to print reports and correspondences.

The different forms that are used in the TRS module are 1900 Authority to Use Computerized Accounting System or Components thereof Loose Leaf Books of Accounts, 1901 Application for Registration For Self-Employed and Mixed Income Individuals, Estates and Trusts, 1902 Application of Registration For Individuals Earning Purely Compensation Income and Non Residence, 1903 Application for Registration For Corporations Partnerships (Taxable Non Taxable) including GAIs, 1904 Application of Registration For One-time Taxpayer and Person Registering under EO98, 1904T For One-Time Transaction Taxpayer only, 1905 Application for Registration Information Update, 1906 Application for Authority to Print Receipts and Invoices, and 2305 Certificate of Update of Exemption and of Employer's or Employee's Information.

TERMINAL OBJECTIVES

At the end of the training, participants will be able to perform functions using the new system under the Taxpayer Registration System (TRS) function based on their roles utilizing the Electronic Tax Information System.

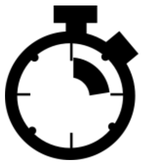
LEARNING OUTCOMES

- Describe what eTIS-1 is and its benefits
- Explain the functionalities of eTIS-1
- Identify parts of the eTIS user interface
- Identify the different functions under TRS

LEARNING OUTCOMES (Cont'd)

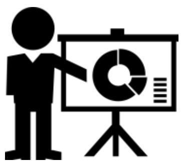
- Navigate through eTIS-1 and perform the following:
    - Login and logout of the system
    - Change login password in the system
    - Register Individual and Non-Individual Taxpayers
    - Register a branch and issue a branch code
    - Register a facility and generate a facility code
    - Create an application for ATP Update/ modify the registration information of a certain taxpayer
    - Search for a given taxpayer
    - Suspend a tax type or form type that is no longer applicable to the taxpayer
    - Reactivate a tax type or form type that is applicable to the taxpayer
    - De-register the taxpayer record including the taxes registered
    - Re-register a tax type or form type of a taxpayer
    - Transfer a taxpayer to a different RDO
    - Transfer a taxpayer as LT and vice-versa
    - Change the accounting type of a business or non-individual taxpayer
    - Be able to "mark" taxpayers who have not filed taxes for 2 or more years or "unmark" those who have re-continued to file taxes
    - Approve or reject auto-generated tasks initiated by the modules within eTIS-1
    - View and/or print reports

SYMBOLS



Duration of section

Participant Workbook



Powerpoint Presentation

Important

Paired Exercise

Group Exercise

Play Video

Individual Activity

DAY ONE – eTIS FUNCTIONAL TRAINING FOR END USERS FULL/APPROVERS TRAINING INSTRUCTOR GUIDE (TRS)

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SLIDE # 1

SLIDE # 2

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Welcome & Introduction ***30 minutes***

DO:

- Show Cover Slide.

SAY:

- Welcome to the eTIS Training (Electronic Tax Information System) Taxpayer Registration System (TRS) Training. I am ***[Your Name].*** I will be your facilitator throughout the training.

- Before we start with the training, let's get to know each other. Share with the class the following information:
    - ***Your name***
    - ***Division***
    - ***Office***
    - ***Section***
    - ***Tagline and Why***
    - ***Expectations of the course.***

DO:

- Before you ask someone to introduce, be the first one to share your division, office, section, tagline and reason, and your expectations of the participants.

DO:

- Write expectations on a flipchart paper. Thank the participants after they have all introduced themselves.

You may use this activity or refer to the activity bank on the appendix section to get more ice breaker and energizer ideas.

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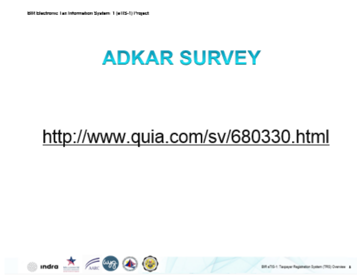
SLIDE # 3



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ADKAR Employee Feedback ***15 minutes***

DO:

- Show ADKAR Employee Feedback

SAY:

- We all have heard about eTIS during the briefing sessions and other communication channels, like brochures, emails…etc. We all know that this is a big change to how we do our work. Now, we want to know how you feel and what you think about this change.
- Kindly go to the link (projected on the screen) and complete the questionnaire. It will just take you 10 minutes to complete the survey. Your responses will be confidential and will be used to further improve components of the project.

DO:

- Thank the participants after completing the survey.

ADKAR Link: http://www.quia.com/sv/680330.html

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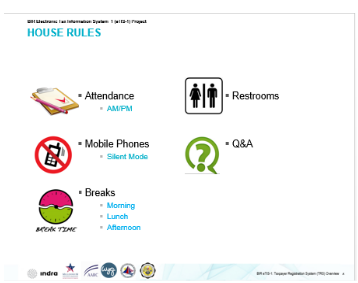
SLIDE # 4



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House Rules ***5 minutes***

SAY:

- Before we start our training, let us go through some reminders to ensure that our training is fun, engaging and achieves the objectives. These are:
  - Attendance checked in the morning before the start of each day and in the afternoon after lunch break. Registration is between ***[8:00am – 8:30am / or the first 30 minutes of the scheduled training].*** Anyone who comes in after 8:30am shall be considered late.
  - 100% attendance is required. Any non-attendance and late shall be documented and reported to your immediate supervisor for action.
  - Kindly put your cell phones on silent mode when inside the training room. If you need to take an urgent call, please step outside the training room quietly.

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- There will be a one (1) lunch break and two (2) 15-minute breaks throughout the day. Those who exceed the allotted break schedules shall be considered late.
- If you need to use the restroom during training hours, please step out of the training room quietly.
- You are issued two (2) materials:
  - End User Guide. This contains the step-by-step process to complete system tasks.
  - Participant Guide. You will see that your participant guides have some blank spaces. Make sure to complete those and other exercises to help you retain concepts and topics better.
- Most importantly, make sure to participate and ask questions.

ASK:

- Is there any item that you would like me to clarify?

Always deliver house rules positively. Make discussions brief.

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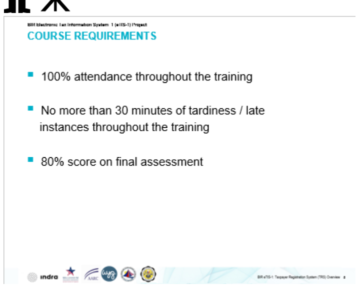
SLIDE # 5



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Course Requirements **5 *minutes***

SAY:

- In order to pass this course, we have three (3) requirements:
  - Attendance – 100% attendance throughout the training
  - Tardiness / Lates – No more than 30 minutes throughout the training
  - Assessment – 80% Passing Rate
- If you do not pass the assessment, you will be allowed to take the assessment two more times.

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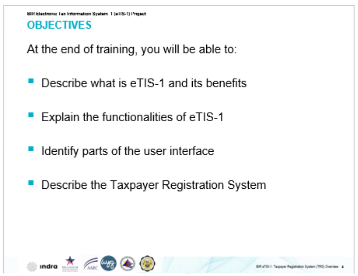
SLIDE # 6-9



Objectives — ***10 minutes***

SAY:

- At the end of this training, you will be able to have a hands-on experience of the Taxpayer Registration System of eTIS. You will be able to use the system first hand to apply the functionality.

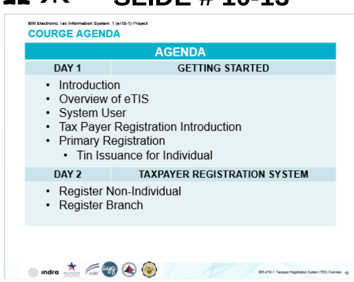
DO:

- Read and explain each of the objectives briefly and ask participants if there are any questions.

SAY:

- Some additional things to remember:
  - This training is **NOT** the venue to discuss policies and procedural issues. We are here for the purpose of learning TRS and its functions in the system.
  - This training will **NOT** provide a refresher on the Return Filing and Processing business process. This training will be about how we use the system for the process.

SLIDE # 10-13



Course Agenda — ***5 minutes***

SAY:

- This is a 4-day training. We will get to know the following topics day after day.
- **Day 1: Primary Registration 1**
  - Introduction
  - Overview of eTIS
  - System User
  - Tax Payer Registration Introduction
  - Primary Registration
  - Tin Issuance for Individual
- **Day 2: Primary Registration 2**
  - Register Non-Individual
  - Register Branch

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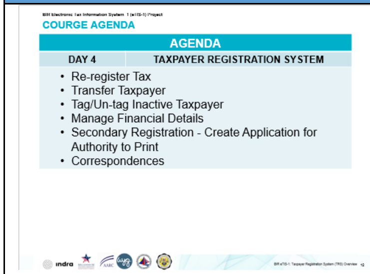

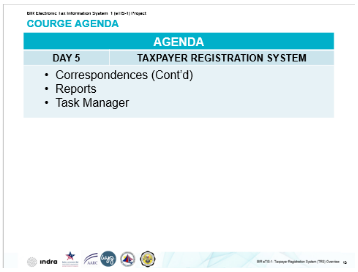

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- **Day 3: Register and Manage Taxpayer**
  - Register Facility
  - Introduction to Manage Taxpayer
  - Find Taxpayer
  - Update Taxpayer
  - Suspend Tax
  - Re-activate Tax
  - De-register Tax
- **Day 4: Manage Taxpayer and Secondary Registration**
  - Re-register Tax
  - Transfer Taxpayer
  - Tag/Un-tag Inactive Taxpayer
  - Manage Financial Detail
  - Secondary Registration
  - Create Application for Authority to Print
  - Correspondences
- **Day 5: Reports**
  - Reports
  - Task Manager
- As we discuss each topic, there will be hands-on application that will allow you to test each process.

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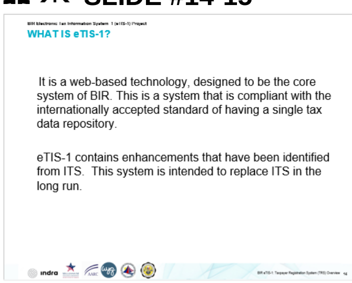
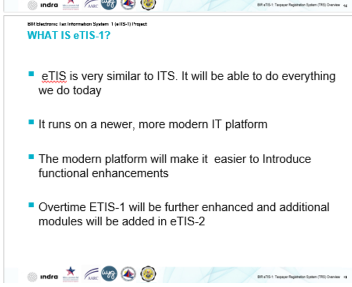
SLIDE #14-15





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What is eTIS? ***15 minutes***

DO:

- Do NOT show this slide yet. You can do this by pressing the letter “B” to turn the screen black.
- Ask participants to go to ***[page x]*** of their participant guide and ask them to complete the exercise by answering:
  - In their own understanding, ask participants to write what is eTIS on their participant guide.
  - Why is eTIS important?
  -
- Give them 5 minutes to complete the exercise.
- Ask 2 participants to share their definition of eTIS and its importance.

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Show slide by pressing “B” again.
SAY:
eTIS is a web-based technology, designed to be the core system of BIR. It is compliant with the internationally accepted standard of having a single tax data repository.
It contains enhancements that have been identified from ITS. This is intended to replace ITS in the long run.
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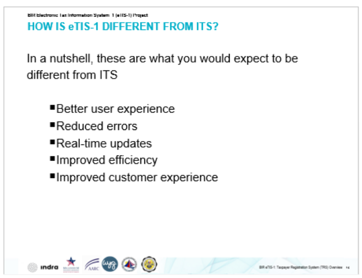
SLIDE # 16


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eTIS vs. ITS 5 minutes
SAY:
eTIS is a completely new system that will support your daily operational tasks to make it easier. It has some key differences from ITS.

Better User Experience. The graphic user interface is made for better user experience. It is web-based similar to how you access and navigate social networking sites and search engines (ie. Facebook, Google, Yahoo…etc.).
Reduced Error. The enhancements in the system aims to greatly reduce the risk of error.
Real-time Updates. There is a real time updating of records in a consolidated database and it will reduce the effort and time needed to perform daily operational tasks such as auto-generated reports and online approvals.
Improved efficiency. Reduces the error and time needed to perform daily operational tasks such as auto-generated reports and online approvals.
Improved customer experience. Mainly, it will improve customer experience making us serving them better.

SAY:
As we go through the training, we will learn more differences between ITS and eTIS.
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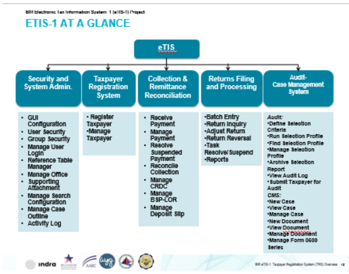
REFERENCE	SCRIPT

SLIDE # 17

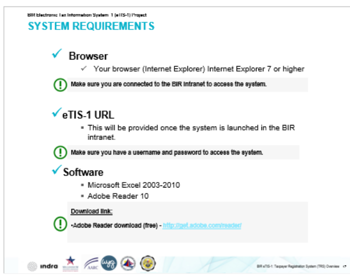


ETIS at a Glance *2 minutes*

SAY:

- Here is chart that shows the different sub-functionalities in eTIS-1. eTIS-1 is composed of 5 major modules. Each of the 5 major modules contain functionalities that support the processes of BIR.
- TRS is composed of 2 functions, these are Registering and managing taxpayer.

SLIDE # 19



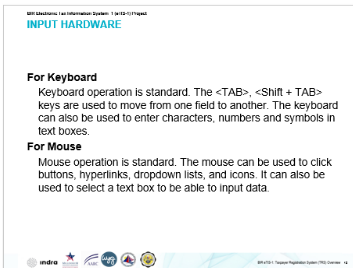
System Requirements *3 minutes*

SAY:

- Before we go to the specific task of this training, let us have a quick discussion of the system requirements and a functional guide to familiarize ourselves with the system.
- System requirements are the minimal computer specifications that we need in order to run the system smoothly. These are: browser, eTIS URL or web address, software needed.
- The recommended browser is Internet Explorer 7 or higher. The system is tested in this platform and it will perform properly its functions using the said browser. You must also make sure that you are connected to the BIR Intranet to access the system
- You must launch the eTIS URL or web address to get into the system. This will require a username and password. These details will be available once eTIS is launched.
- There are additional software needed to supplement the access. You will need Microsoft Excel in 2003 to 2010 versions and an Adobe Reader that reads PDF files in version 10. You can download the reader using this link.

REFERENCE	SCRIPT

SLIDE # 20



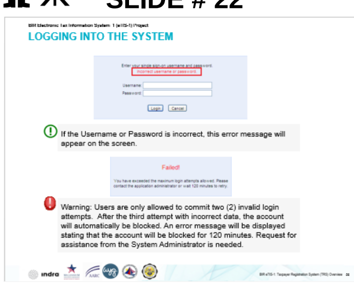
Input Hardware *2 minutes*

SAY:

- These are needed input hardware for you to navigate the system. First is the keyboard. There are keys that are essential in order to navigate the system. Examples are <TAB>, <Shift + TAB> keys. These are used to move from one field to another. The keyboard can also be used to enter characters, numbers and symbols in text boxes.
- Another hardware is the mouse. The mouse can be used to click buttons, hyperlinks, dropdown lists, and icons. It can also be used to select a text box to be able to input data.
- We will practice using these later.

SLIDE # 21

SLIDE # 22



Logging in / Logging Off the System *20 minutes*

DO:

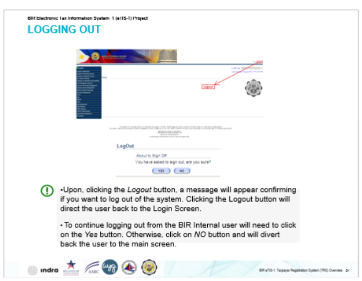
- Show the URL (webpage) to access eTIS

SAY:

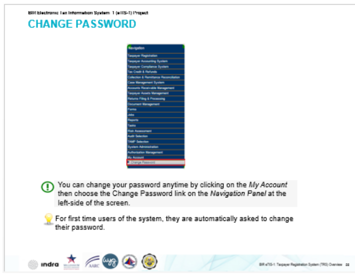
- We'll now learn how to navigate the system. But first, let us go to where you'll access the system. When you start using the system, you will not be using the training environment. You will be given a new URL to access the live system. For now, we will be using the training environment. You will also have a desktop shortcut on your desktop pc so you do not have to remember the URL.
- The URL (Uniform Resource Locator) is like your address. It is unique and points to a specific location in the world wide web.
- Once you are already in the homepage, you will be asked to login with a user id and password. You will be given a username and password before you use the system, but for today, we will be using a training login.

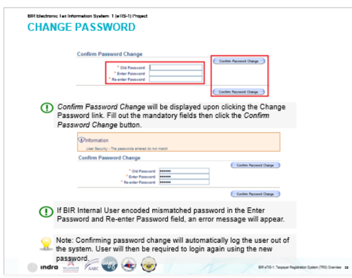
DO:

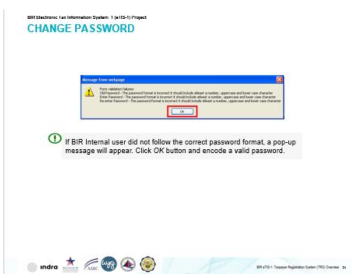
- Distribute the training logins to participants.
- Remind participants that you will all be doing it together.

REFERENCE	SCRIPT
	SAY: ▸ As mentioned earlier, we will be doing this together. Before you start navigating the system, I will show you first how to do it then, I'll give you time to do it yourself. ▸ Once you see the login page, enter your username and password. **DO:** ▸ Show the class how to login. ▸ Ask the class to login. ▸ Guide participants by asking who were able to successfully login and those who were not. ▸ Provide guidance to those who were not able to login. **SAY** ▸ When you enter an incorrect username and/or password, the system will display a warning – incorrect username and password.
SLIDE # 23  	▸ You are provided 2 invalid attempts and after that your account will be blocked for 2 hours before you can re-try accessing the system again. This is a security feature that is incorporated into the system to safeguard the information from unauthorized users. ▸ If in cases like this, contact your Systems Administrators to request for a password reset. **SAY** ▸ Let us now log out of the system. After being able to fulfil all your transactions in the system, never forget to log out. This is important so that we can protect the system from unauthorized users. ▸ On the upper right hand corner of your screen, you will see a logout button. ▸ To log out, click on the Logout button on the upper right hand corner and a pop up notification will ask you to verify your choice. ▸ Click on Yes to the system confirmation to logout of the system. (Ask participants to login again to test understanding.).

REFERENCE	SCRIPT
SLIDE # 24-26	**Changing Password** ***10 minutes***







SAY:

- Once you login for the first time, you will be asked to change your password automatically. Once you're issued a username and password, you may opt to change it using the Change Password function. You can change your password from time to time for additional security.

- You can change your password anytime by clicking on the My Account then choose the Change Password link on the Navigation Panel at the left-side of the screen.

- Once you've accessed this function, you'll be required to enter your old password, or the default password that your Systems Administration team has provided and then you have to assign your new password.

- If BIR Internal User typed in a mismatched password in the Enter Password and Re-enter Password field, an error message will appear.

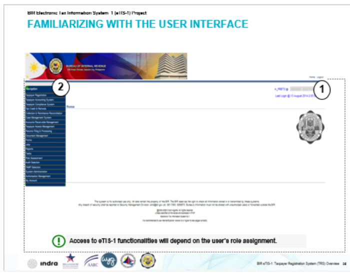
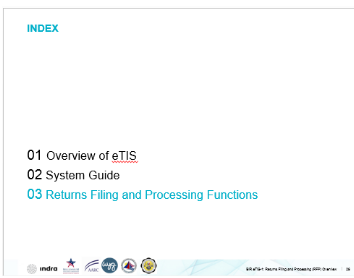
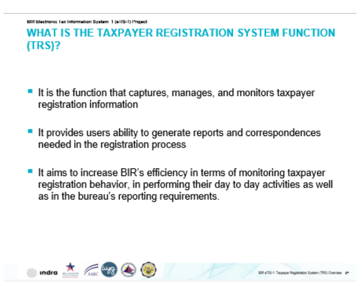
- Make sure that the password that you are assigning complies with the password requirement of the system. You should provide a minimum of 8-character-password which must include number/s, lower case, and upper case letter/s.

- Take note that confirming password change will automatically log the user out of the system. User will then be required to login again using the new password.

- If BIR Internal user did not follow the correct password format, a pop-up message will appear. Click *OK* button and encode a valid password.

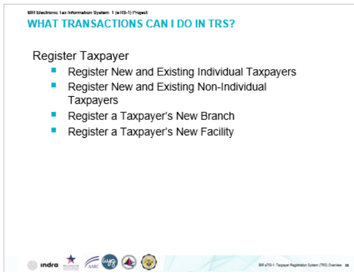
DO:

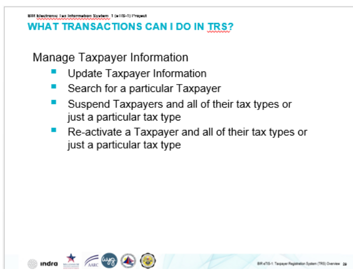
- Show class how to change password.
- Ask them to change their password.
- Go around the room to check for participants who are having difficulties changing the password.

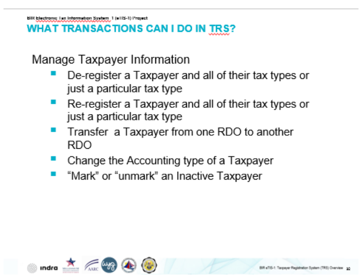
REFERENCE	SCRIPT
SLIDE # 27 	**User Interface Familiarization** ***5 minutes*** **SAY:** - The headers menu refers to the Home and Logout link. This is where you can get back to the main page of eTIS. While some of the functions are dependent on your access level. - The side menu is the Navigation Panel that shows the functions that is assigned to your function.
SLIDE # 28  **SLIDE # 29** 	**Taxpayer Registration System (TRS) Functions** ***5 minutes*** **SAY:** - Let us now go through the Taxpayer Registration System Functions. - It is the function that captures, manages, and monitors taxpayer registration information - It provides users ability to generate reports and correspondences needed in the registration process - It aims to increase BIR's efficiency in terms of monitoring taxpayer registration behavior, in performing their day to day activities as well as in the bureau's reporting requirements.

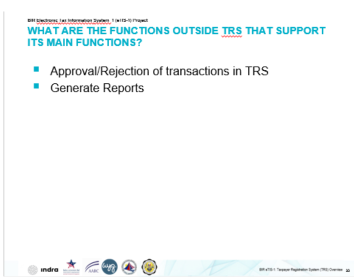
REFERENCE	SCRIPT

SLIDE # 30-33









Transaction in TRS *10 minutes*

DO:

- Briefly walk them through the things they can do in the system.

SAY:

- Depending on your role and system access, you may not have access to certain functionalities. For example, if you are not responsible for resolving suspended returns in the system, you will not be using the Task Manager functionality hence, we will not be discussing it. I'll show you how it looks like, but will not provide you with the details.
- Here are the different functions that is under TRS. (Read each functions in the slides)

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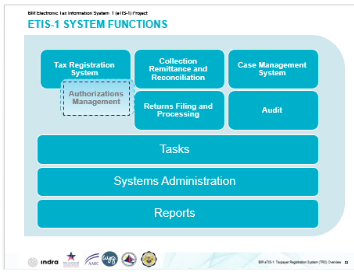
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>

SLIDE # 34



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eTIS-1 System functions *5 minutes*

SAY:

- The 5 functional modules TRS, RFP, CRR, Audit and CMS have their own separate transactions. There are 3 modules or functions that support these 5 modules. I've mentioned earlier that there are 2 functions that can be performed in TRS since you can only have access to Tasks and Reports. The Systems Administration function can only be accessed by the ISG team. Let's take a look at the modules within TRS.

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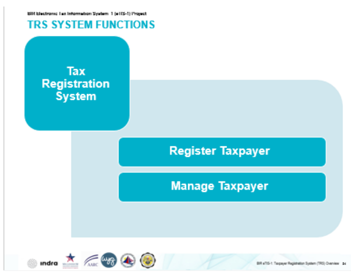
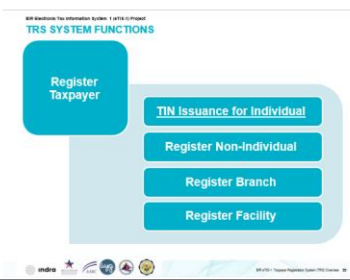
SLIDE # 35-36





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The Tax Registration System *2 minutes*

SAY:

- Under the Taxpayer Registration System, there are 2 main sub-functionalities that you can perform. First is registering a taxpayer and second is managing taxpayer information. We'll go through each one of those as we go through the training. Let us start first with Registering a Taxpayer.

SAY:

- The Register Taxpayer sub-function allows you to do the following:
  - TIN Issuance for Individuals
  - Register Non-Individual
  - Register Branch
  - Register Facility

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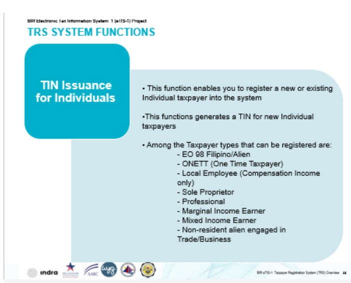
SLIDE # 37



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TIN Issuance for Individuals *5 minutes*

SAY:

- Let us now start with the first task - TIN Issuance for Individuals. This function enables you to register a new or existing Individual taxpayer into the system. It also generates a TIN for new Individual taxpayers.

ASK:

- What are the types of taxpayers that can be registered?

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DO:

- Write answers on the board.
- Verify participants answer using the presentation.

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SLIDE # 38

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Accessing the TIN Issuance for Individuals Entry Sub-Function ***2 minutes***

SAY:

- To access the TIN Issuance for Individuals Entry Sub-Function
- Go to the Navigation panel,
- Click Taxpayer Registration > Register Taxpayer > TIN Issuance for Individual.
- A new screen will show. This is the New Individual Summary details screen.

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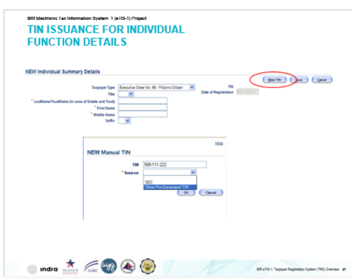
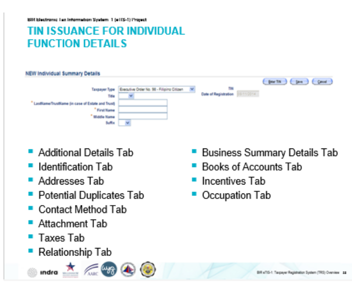
SLIDE # 39



SLIDE # 40



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TIN Issuance for Individual Function Details ***15 minutes***

SAY:

- Before filling in the Tabs for Taxpayers with existing TIN Number, you need to enter their TIN Number. Click on the Enter TIN button and the New Manual pop up window will appear. Enter the Taxpayer's TIN number. The TIN number is a nine digit code automatically separated by a dash when you encode it in the TIN field. Then select the Source. Click Ok.

- For a new registration, you will need to fill in the details in the New Individual Summary details (mention each field). The fields with a red asterisk mean that they are mandatory fields and the transaction cannot be saved without filling out these fields. You can expect to see all or just some of the following tabs depending on the Individual Taxpayer type.

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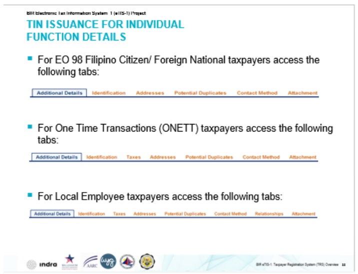
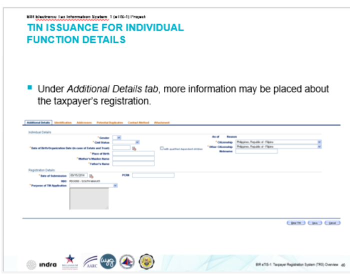
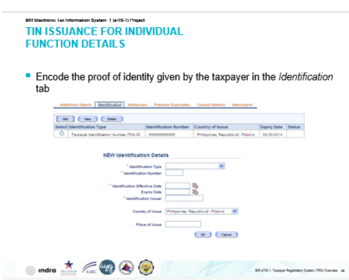
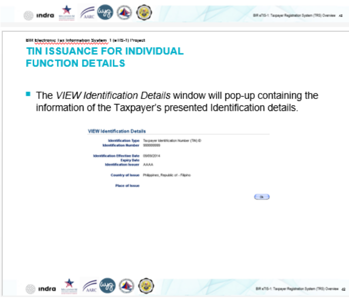
REFERENCE	SCRIPT
SLIDE # 41  	**ASK:** ▸ There are different sets of tabs that can be accessed depending on the type of registration. **SAY:** ▸ Examples of the tabs that can be seen for a certain Individual Taxpayer type are: ○ For EO 98 Filipino Citizen/ Foreign National taxpayers ○ For One Time Transactions (ONETT) taxpayers ○ For Local Employee taxpayers
SLIDE # 42-44    	**Tin Issuance for Individual Function Details** ⏱ ***40 minutes*** *EO 98 Filipino Citizen/ Foreign National taxpayers* **SAY:** ▸ Let's go through the tabs that are applicable to Individual Taxpayers. ▸ The default tab is the Additional Details tab. This enables you to input more information about the taxpayer. It includes gender, civil status, date and place of birth, mother's maiden name, father's name, citizenship and other citizenship if dual. It also includes the date of submission and purpose of TIN application. Make sure to encode all mandatory fields. ▸ The first tab that is unique for Individual Taxpayers is the Identification tab. It enables you to encode a valid proof of identity provided by the Taxpayer such as an SSS ID or any government issued ID. Click on the Add button and a pop up window will appear. The details that you need to fill in are: (Go through the New Identification Details field). ▸ Make sure to enter information for the Country of Issue field if the ID presented by the Taxpayer is issued outside the Philippines; or record two or more identification (ID) details of the Taxpayer (if deemed necessary). IDs that are not listed under the Identification Type drop down menu will not be honored. ▸ Click OK button once done. You may view the identification record by clicking the radio button of the desired record then View. A pop-up containing the information of the Taxpayer's details based upon the presented identification. You may also delete the identification record using the same radio button and click on Delete.

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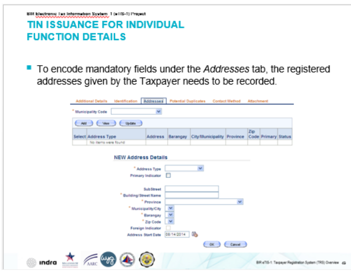
SLIDE # 45-48



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- The next tab is the Addresses Tab. This enables you to encode the registered address given by the taxpayer. To add information, select the Municipality Code then click Add. The new address details window will appear. The Primary Indicator box needs to be ticked if the address being recorded is the primary address of the Taxpayer. If not, leave it unmarked. Encode all details in the mandatory field, then click OK to add the address details. You may also click on Cancel if you want to do otherwise. The added record will be shown on the address table.

- Enter data on the *Country of Issue* field if the ID presented by the Taxpayer is issued outside the Philippines; or record two or more identification (ID) details of the Taxpayer (if deemed necessary). IDs that are not listed under the *Identification Type* drop down will not be honoured.

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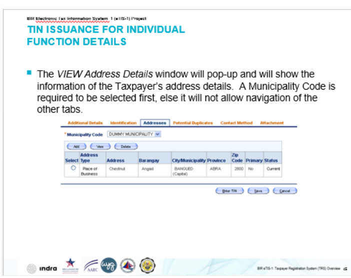

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- To view address record, click the radio button of the desired record and click View. A Municipality Code is required to be selected first, else it will not allow navigation of the other tabs. You may also delete the record by clicking on the radio button of the desired record and Delete. A message prompt will be displayed to ask the certainty of deleting the taxpayer's address record. If you are sure of the action, click OK to delete the record. Otherwise, click Cancel.

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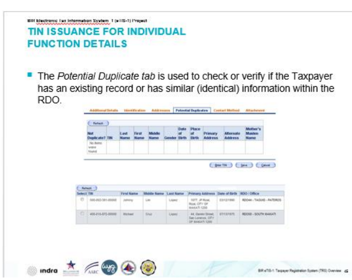

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- The Potential Duplicates Tab is the next tab. The Potential Duplicate tab is used to check or verify if the Taxpayer has an existing record or has similar (identical) information within the RDO. Click on the Refresh button for the system to check through the database. The details on duplicate records will be shown on the table. If in case that there are records that has the same information with the taxpayer's given information, registration will still be saved but it will need an approval from the RDO (Revenue District Officer) or ARDO (Assistant Revenue District Officer) to complete the registration.

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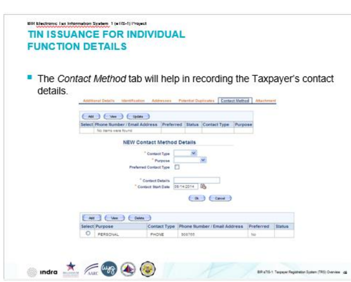

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- Then you have the Contact Method Tab. The Contact Method tab will help in recording the Taxpayer's contact details. Click on the Add button to add details. The NEW Contact Method Details pop-up window will appear. Yu may now start encoding all the mandatory details then click OK to record the information. The added contact details will be seen on the table. You may view the record by clicking the radio button and click on View. You may also delete the record by clicking Delete.

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<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
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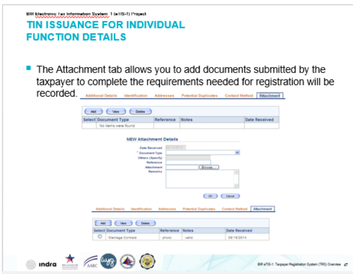
SLIDE # 49


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The Attachment tab allows you to add documents submitted by the taxpayer to complete the requirements needed for registration will be recorded. Click the Add button to upload the document. The NEW Attachment Details pop-up window will appear. Encode all the details and click on OK button to add the record. The maximum number of attachment is up to 15 files and each file must not be more than one (1) megabyte.
The VIEW Attachment Details window will pop-up and it will show the information of the document that Taxpayer submitted. This follows the same steps with the other tabs when you want to view or delete the record.

DO:

Let the participants verify the information you have given by accessing the tabs in their workstation.

SAY:
That concludes TIN issuance for Individual Function Details for EO 98 Filipino Citizen/ Foreign National taxpayers
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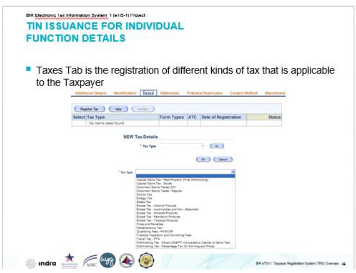
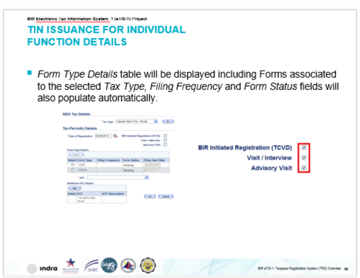
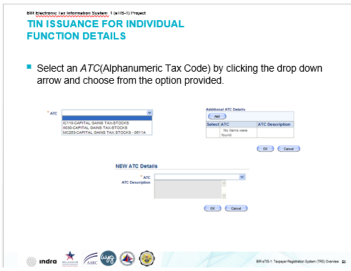
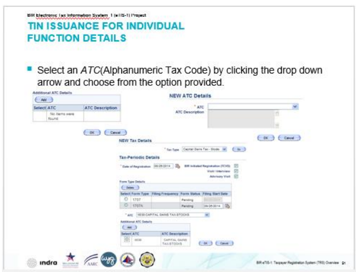
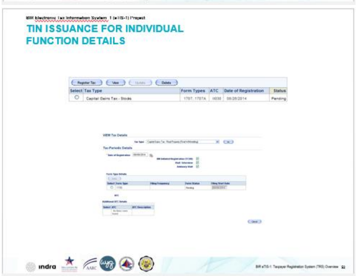
</table>

REFERENCE	SCRIPT
	TIN Issuance for Individual **2 minutes** **Function Details** *ONETT* **SAY:** - Now that you have already completed registration for EO 98 Filipino Citizen and Foreign Nationals, let us now go through registration of ONETT or persons subject to taxes under the One Time Transactions (ONETT).
SLIDE # 50-51  	**TIN Issuance for Individual** **20 minutes** **Function Details** *ONETT* **SAY:** - When you register persons under the One Time Transactions (ONETT), follow same procedure in EO 98 Filipino Citizen/ Foreign National process, only this time the Taxes tab will appear for assignment of tax type to the Taxpayer. - The taxes tab registers different kinds of tax that is applicable to the Taxpayer. To add information, click the Register Tax button. Then a pop-up window will show the *New Tax Details* screen. Select the additional tax on the drop down menu then click the Go button. Additional details will be seen on the screen. Encode all the information needed under Tax-Periodic Details. Form Type Details table will be displayed including Forms associated to the selected Tax Type, Filing Frequency and Form Status fields will also populate automatically. Select a form type by ticking the radio button. Then, tick on the boxes BIR Initiated Registration (TCVD), Visit Interview and Advisory Visit check box if applicable. Otherwise leave it unmarked.

REFERENCE	SCRIPT
SLIDE # 52-54   	- Then, another detail option on the same tab needs to be filled - The ATC (Alphanumeric Tax Code). Select an ATC(Alphanumeric Tax Code) by clicking the drop down arrow and choose from the option provided. Take note that ATC selections will depend on the chosen tax type. To add ATC, click on the Add button. A new window will appear and it will show the NEW ATC Details. Select an additional ATC (Alphanumeric Tax Code) by clicking the drop down arrow and choose from the option provided. On the ATC Description field, the system will auto-populate the description of the chosen ATC. Click on the OK button to add the additional ATC details. The record will be shown on the table.Then click OK. - You may view, update and delete by clicking on the radio button of the record and clicking on the designated button. **SAY:** - That completes registration for persons subject to taxes under the One Time Transactions (ONETT). Let us now go to the registration for Local Employees.

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TIN Issuance for Individual
Function Details ***2 minutes***
LOCAL EMPLOYEE

SAY:

- For Local employees registration, follow same procedure in ONETT process, only this time the *Relationships Tab* will appear for provision of Taxpayer's third party representative.

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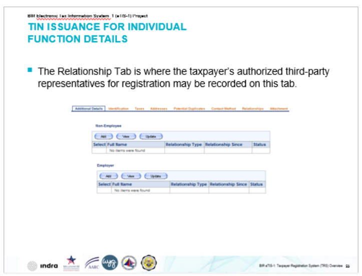
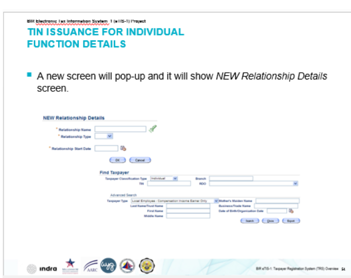
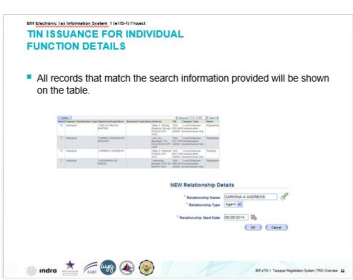
SLIDE # 55-57







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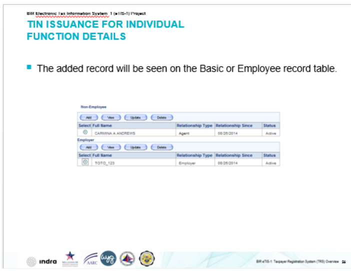
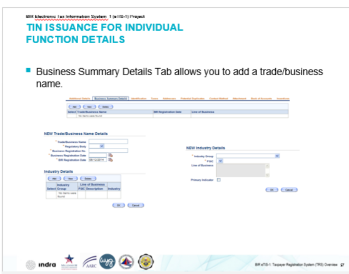
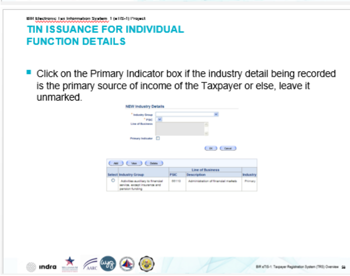
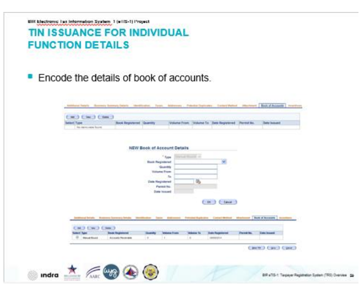
TIN Issuance for Individual
Function Details ***20 minutes***
LOCAL EMPLOYEE

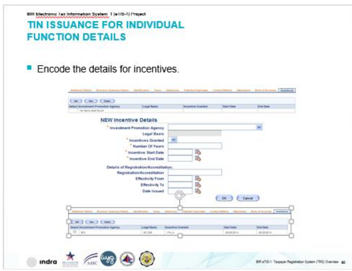
SAY:

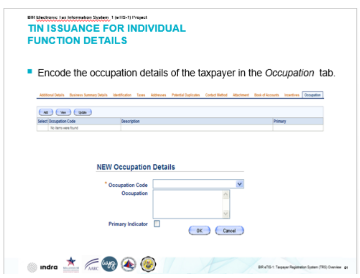
- The relationship tab enables the Taxpayer's authorized third-party representatives for registration may be recorded on this tab. There are 2 types under the tab.
  - Non-Employee - Records of all commission based employee which is being declared by the Business Taxpayer.
  - Employee - Records of all fix based employees which are being declared by the Business Taxpayer.
- Click on the Add button to add the details. A new screen will pop-up and it will show NEW Relationship Details screen.Click on the flashlight icon to search for the name of the who is a registered individual taxpayer working for the taxpayer's Business. The Find Taxpayer window will pop up. Enter search parameter and click on the Search button. You may also cancel by clicking the Close button.
- All records that match the search information provided will be shown on the table. Choose the record of the employee record by ticking the radio button. Then click on continue. Click on the OK button to add relationship record. Otherwise, click on the Cancel button.

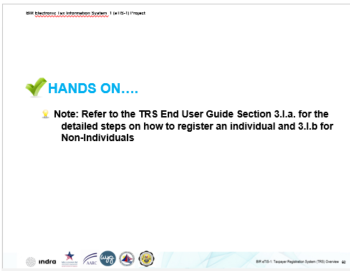
</td></tr>
</table>

REFERENCE	SCRIPT
SLIDE # 58  	• The added record will be seen on the Basic or Employee record table. You may view, update and delete the record by selecting the radio button of the recordn and choose the approriate action. A new screen will pop-up and will show the View Relationship Details screen. **ASK** • Any questions regarding registration for Local Employees? **SAY** • If there is none, then let us go through registering Sole Proprietors.

REFERENCE	SCRIPT
	TIN Issuance for Individual *2 minutes* **Function Details** *SINGLE PROPRIETOR* **SAY:** ▸ Follow same procedure in ONETT process, except the added *Business Summary Details Tab, Book of Accounts Tab and Incentives Tab*
SLIDE # 59-61   	**TIN Issuance for Individual** *20 minutes* **Function Details** *SINGLE PROPRIETOR* **SAY:** ▸ A Single Proprietor follow the same procedure in ONETT process only that there is an added tabs. These are Business Summary Details Tab, Book of Accounts Tab and Incentives Tab. ▸ Let us go through the Business Summary Details Tab. Business Summary Details Tab allows you to add a trade/business name. To add a trade/business name, click on the Add button. Type in all the details in the mandatory fields then click the Add button in the Industry details. The NEW Industry Details pop-up screen will be displayed. Fill the fields with the information needed. Please note that you should click on the Primary Indicator box if the industry detail being recorded is the primary source of income of the Taxpayer or else, leave it unmarked. Once done, click on OK and the update will be shown on the table. ▸ Then we have the Book of Accounts Tab. This enables you to [add function description]. To add book of account details, click on the Add button. The NEW Book of Account Details window will appear. Fill the fields with information needed. Click the OK button to add the book of accounts details. Otherwise, click on the Cancel button. You may also view, and delete record by choosing the radio button and selecting the appropriate action.

REFERENCE	SCRIPT
SLIDE # 62  	• For the Incentives Tab, you may add the information or record by clicking on the Add button. The *NEW Incentive Details* window will pop-up and you must input all the details in the mandatory fields. Click the OK button to add the incentive details and the Cancel button to undo transaction. The View button and delete button are also available with same steps as the other tab. The VIEW Incentive Details window will appear and display the information of the Business' incentive details. **SAY:** • We've just completed registrations for single proprietorship. Now, let's register Professionals.

REFERENCE	SCRIPT
	TIN Issuance for Individual **2 minutes** **Function Details** *PROFESSIONAL* **SAY:** - Follow same procedure in Single Proprietor process, only this time the *Occupation Tab* will appear for provision of the Taxpayer's primary and secondary (if applicable) occupation.
SLIDE # 63 	**TIN Issuance for Individual** **15 minutes** **Function Details** *PROFESSIONAL* **SAY:** - The Professional Taxpayer registration follows the same procedure with the Single Proprietor. A new tab is introduced in this function. The Occupation tab is where you encode all the provided Occupations of the Taxpayer. Click on Add and the New Occupation Details window will appear. Select the Occupation Code applicable to the Taxpayer. You may add details in the Occupation field. Tick primary indicator if the Occupation you will add is the primary source of income of the Taxpayer. Click OK. You may also view and update the record using the same procedure as presented in the other tabs.
	TIN Issuance for Individual **20 minutes** **Function Details** *MARGINAL INCOME EARNER, MIXED INCOME EARNER AND NON-RESIDENT ALIEN ENGAGED IN TRADE/BUSINESS* - There are 3 more other types of taxpayer. These are the: Marginal Income Earner, Mixed Income Earner and Non-Resident Alien Engaged in Trade/Business. Please refer to the end-user guide for the tabs that are available in each type. Please refer to page 56-59 of your end user guide.

REFERENCE	SCRIPT
SLIDE # 64 	**Hands-on Activity** **60 minutes** Individual Activity **SAY:** • Now, try doing this on your own. Kindly go to ***[page x]*** of your participant guide and follow the instructions provided. **DO:** • Make sure to go around the room to assist the participants. • Once the activity is done, make sure to ask the participants if they have questions.
	Wrap Up & Closing ***40 minutes*** **ASK:** • That concludes our Day 1 of eTIS Training? How do you find it so far? • Ask each participant what is their key learning takeaway for today? It may be a difference in the functionality, benefit of the new system…etc. **DO:** • Once everyone had their turn, thank participant for their time. • Remind them to be on time. ***Other wrap-up activities can be found online or in the appendix section of the this guide.***

DAY TWO – eTIS FUNCTIONAL TRAINING FOR END USERS
FULL / APPROVERS TRAINING INSTRUCTOR GUIDE (TRS)

REFERENCE	SCRIPT

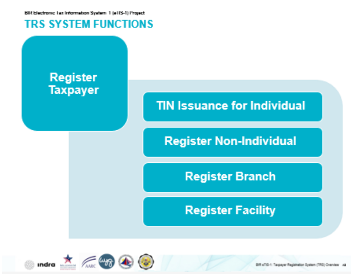
Review of Previous Day's Topics — **30 minutes**

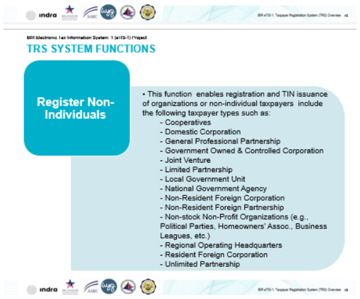
DO:

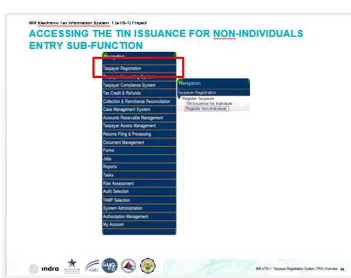
- Deliver a review activity.

Other review activity and energizers can be found in the appendix section.

SLIDE # 65-67







Register Non-Individuals Function Details — **210 minutes**

SAY:

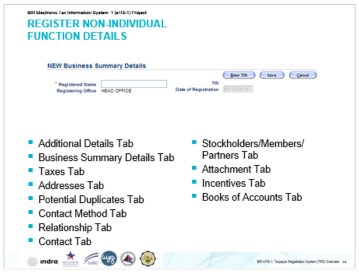
- So far, we've gone through the following:
    - Overview of eTIS
    - System User
    - Tax Payer Registration Introduction
    - Primary Registration
        - Tin Issuance for Individual
- Today let us continue with the register taxpayer function.

SAY:

- Now we'll go through the Registering Non-Individuals function details.
- This function enables registration and TIN issuance of organizations or non-individual taxpayers include the following taxpayer types such as (Go through the list one by one).
- To access the function, under the Navigation Panel, click on Taxpayer Registration > Register Taxpayer > Register Non-Individual. You will be redirected to New Business Summary Details.

<table>
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>

SLIDE # 68



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- Now just like TIN Issuance for Individuals, for a new registration, you will need to fill in the details in the New Summary details (mention each field). Again, the fields with a red asterisk mean that they are mandatory fields and the transaction cannot be saved without filling out these fields.
- This is different with registering an individual which changes per type, all of these tabs are applicable to the Business Taxpayer type. These are the tabs that you will see in this function.
    - Additional Details Tab
    - Business Summary Details Tab
    - Taxes Tab
    - Addresses Tab
    - Potential Duplicates Tab
    - Contact Method Tab
    - Relationship Tab
    - Contact Tab
    - Stockholders/Members/ Partners Tab
    - Attachment Tab
    - Incentives Tab
    - Books of Accounts Tab

- To Add, View or Update Taxpayer's information details, click on the appropriate tab headings. The following are the available information tabs for the Taxpayer's Non-individual reference details.

DO:

- Ask students to access the system and mention the tabs by calling participants one by one.
- This will also verify that they are in the same page that you are discussing.

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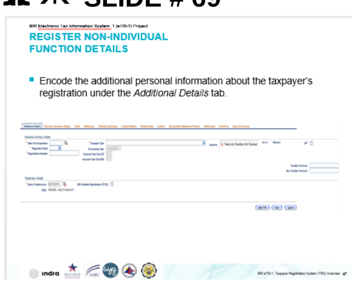
SLIDE # 69



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SAY:

- Let's go through each of the tabs for non-individual taxpayer. The first tab is the Additional details tab. The Additional details tab which requires you to fill in additional personal information about the Taxpayer. Take note that you should Tick the VIP Indicator box if the business being registered is VIP. Otherwise, leave it unchecked.

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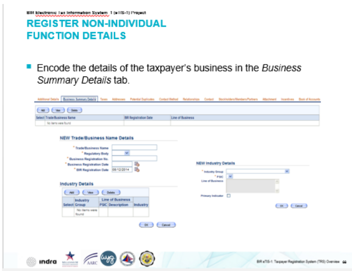
SLIDE # 70-73



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- Next is the Business Summary Details Tab. Encoding the details of the business can be done in the Business Summary Details tab. Click on the Add button, and the New Trade/Business Summary Details window will appear. (Go through the New Trade/Business Name Details). You can also add the Industry details which describe the nature of the Taxpayer's business. The Industry type is further broken down by PSIC codes. Click Ok button once done.

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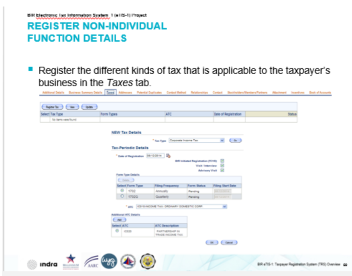

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- Under the Taxes tab, you can be able to register all the applicable tax types per taxpayer. Click on the Register Tax button and the New Tax Details will appear. Select the applicable tax type and Click on the Go button. You will also be required to enter the Date of Registration. Select an ATC (Alphanumeric Tax Code) for every Tax type you register for the Taxpayer. You also can input additional ATC details. Click the OK button once done.These details will then appear on the Tax Type panel. Tick TCVD, Visit/Interview and Advisory Visit if applicable.

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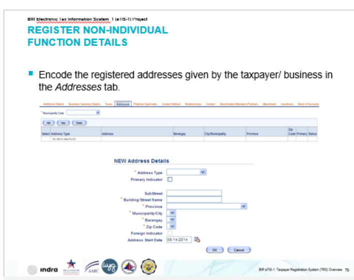

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- The Addresses tab enables you to encode the address of the Taxpayer's place of business for all of their registered businesses. Click on the Add button and the New Address details window will appear. (Go through the fields of the New Address details window). Tick the Primary Indicator if this is the primary address of the Taxpayer's business. Click the OK button once done.

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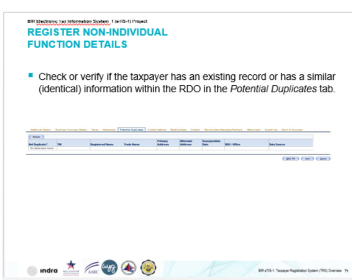

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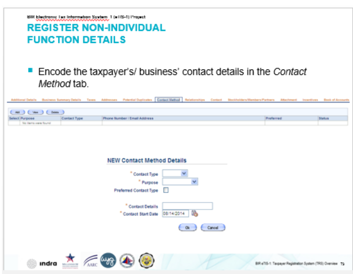
- The Potential duplicates tab ensures that the Taxpayer is unique within the RDO. If in case there are records that have the same details as the new Taxpayer, the system will still save it, but it is subject for the approval of the Revenue District Officer or Assistant Revenue District Officer. The approval/rejection process will be discussed in the Tasks function.

</td></tr>
</table>

REFERENCE	SCRIPT

SLIDE # 74-76

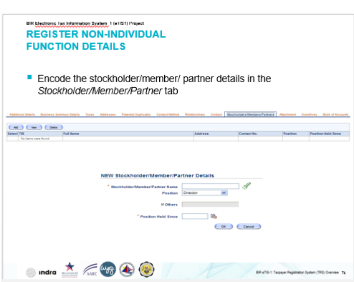
- The Relationships tab enables you to encode the taxpayer's authorized third party representative. Click on the Add button under either Employee or Non-employee. Records of commission based employees are declared by the Business Owner under Non-employee. Employees with fix base income are declared by the Business Owner under Employee. (Go through the New Relationships Details window)



- Then the next tab is the Contact Method Details tab. You can add the various ways to contact the taxpayer. It can either be through phone, email etc. Click on the Add button and the New Contact Method details pop up window will appear. (Read through the fields). Tick on the Preferred Contact type field, if a particular contact method is the preferred contact type of the Taxpayer.

- The Contact Tab allows a point of contact for that Taxpayer's business. To add a record, click on the *ADD* button. The NEW Contact Details screen will appear. Click on the flashlight icon to search for the name of the person who is a registered individual taxpayer working for the taxpayer's Business. The Find Taxpayer window will pop up. Enter search parameter /s. Click on the Search button. You may also click on the Export button to save the results in Microsoft Excel. Otherwise, click Close to terminate. All records that match the search information provided will be shown on the table. Select the record of the employee record by ticking the radio button. Click on Continue button.

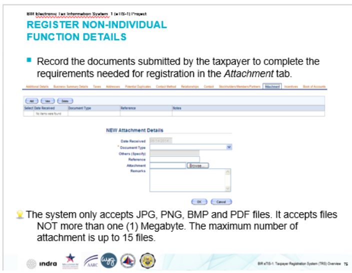
- Click on the OK button to add contact record. Otherwise, click on the Cancel button. The added record will be seen on the contact record table. You may view and delete the record the same way that we always do for the other tabs.



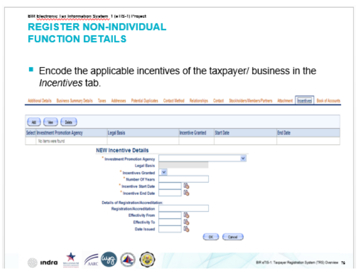
- The next tab is the Stockholder/ Member/ Partner tab Click on the Add button and a pop up window will appear. (Go through the New Stockholder/ Member/ Partner Details field). Use the Flashlight icon to search for the name of the Stockholder/Member/ Partner who is a registered individual taxpayer working for the taxpayer's Business. Select the taxpayer and click Continue. Then click OK button once done.

REFERENCE	SCRIPT

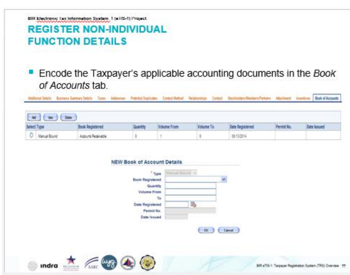
SLIDE # 77-80



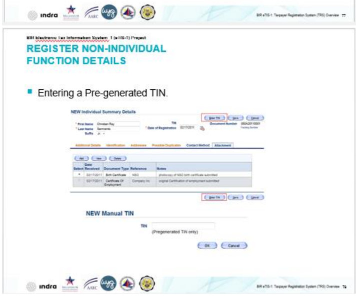
- The Attachments tab enables you to record and upload soft copies of the supporting documents submitted by the Taxpayer. Click on the Add button and the New Attachment Details pop up window will appear. (Go through the fields, read the note beside the Light bulb icon)



- Under Incentives tab, you can encode all applicable incentives to the Taxpayer. Click on the Add button and the New Incentive details window will appear. (Go through fields of the New Incentives window). Click OK.

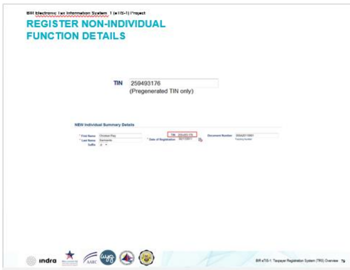
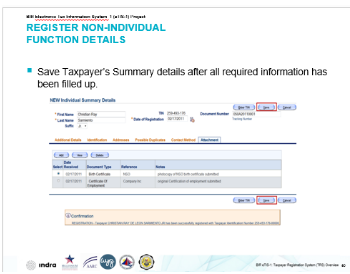
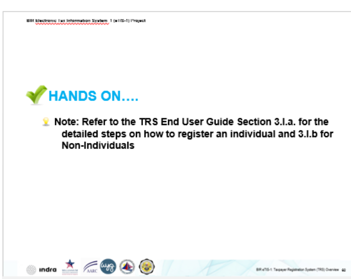


- Under the Book of Accounts tab, you can enter all applicable accounting documents in the Book of Accounts tab. Click on the Add button and the New Book of Account details window will appear. (Go through the fields of the Book of Accounts window).



- When entering the Pre-generated TIN, you must click the Enter TIN button. You may choose any of the two (2) *Enter TIN* buttons to enter a pre-existing TIN. A new window will pop-up and will show the New Manual TIN screen. Key-in the pre-generated TIN on the TIN field. Please not that this is 9-digit number only; not including the dash (-) symbols.

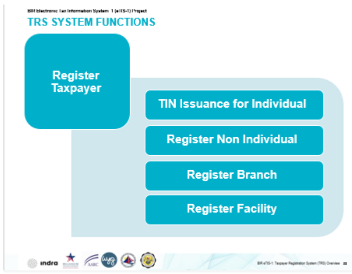
- Once you've encoded all necessary information, click on the Save button. For new Taxpayers without a TIN number, the TIN number will be generated after clicking the Save button. Click on the OK button to save TIN. To discontinue saving the TIN, click on the Cancel button. The TIN of the taxpayer will automatically generate on the TIN field found in the New Individual Summary Details.

REFERENCE	SCRIPT
SLIDE # 81-82  	▸ The system will refresh the screen and a confirmation message will be seen on the screen informing user that Taxpayer has been registered.
SLIDE # 83 	**Hands-on Activity** **60 minutes** Individual Activity **SAY:** ▸ Now, try doing this on your own. Kindly go to ***[page x]*** of your participant guide and follow the instructions provided. **DO:** ▸ Make sure to go around the room to assist the participants. ▸ Once the activity is done, make sure to ask the participants if they have questions.

REFERENCE	SCRIPT

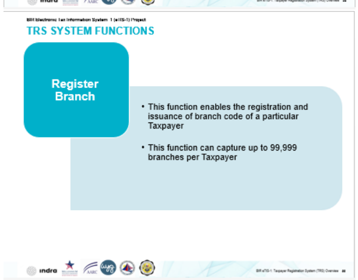
SLIDE # 84-87

Register Branch *60 minutes*



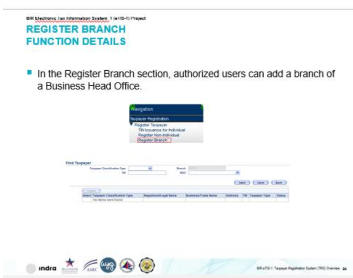
SAY:

- We're done with TIN issuance for Individuals, Registering Non Individuals. Let us now proceed with the next function for registration. Register Branch.

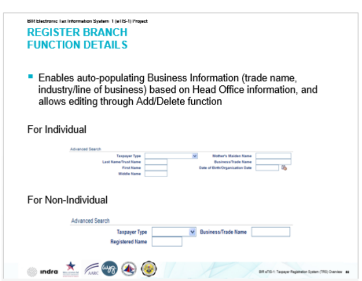


SAY:

- Register branch function enables the registration and issuance of branch code of a particular Taxpayer. It also can capture up to 99,999 branches per Taxpayer



- Let's go through the interface. To access the Register Branch Interface, Under the Navigation panel, click on Taxpayer Registration > Register Taxpayer > Register Branch. The Find Taxpayer screen will appear. Enter a parameter to search a record. Select a Taxpayer Classification Type by clicking on the drop down menu beside the required detail. Select either Individual or Non-Individual type.



- To enable easy registration of a branch to a Taxpayer based on Head Office Information. Enter Taxpayer's details in Advance Search. The system will display a table list of the chosen data type record. Select the appropriate Individual or Business record by clicking on the radio button under Select column of the table list. Click on the Continue button to go on with registering a branch.

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<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
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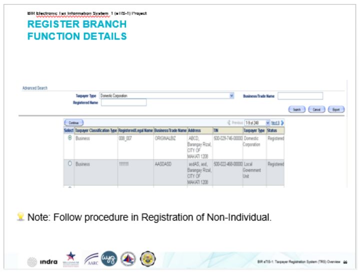
SLIDE # 88-89



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- The New Business Summary Details screen will appear. To Add, View or Delete Taxpayer's Non-Individual Branch information details, click on the appropriate tab headings. The following the available Information Tabs for the Taxpayer's Non-Individual Branch reference details:
  - Additional Details
  - Business Summary Details
  - Taxes
  - Addresses
  - Potential Duplicates
  - Contact Method
  - Relationships
  - Contact
  - Stockholders/Members/ Partners
  - Attachment
  - Incentives
  - Book of Accounts
- Please note that this follows the same steps in registering Non-Individual Process.
- Once all necessary information are encoded, click on the Save button to register the Non-Individual branch. Otherwise, click on the Cancel button. A confirmation message will appear on the screen informing that registration of branch has been saved. Also, registered tax will need an approval.

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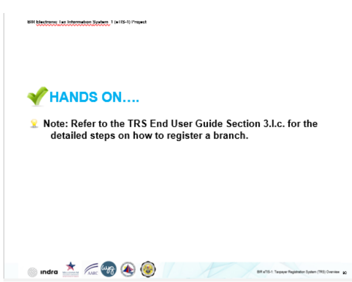
SLIDE # 90



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Hands-on Activity **60 minutes**

Individual Activity

SAY:
- Now, try doing this on your own. Kindly go to ***[page x]*** of your participant guide and follow the instructions provided.

DO:
- Make sure to go around the room to assist the participants.
- Once the activity is done, make sure to ask the participants if they have questions.

</td></tr>
</table>

REFERENCE	SCRIPT
	Wrap Up & Closing *30 minutes* **ASK:** • That concludes our Day 2 of eTIS Training? How do you find it so far? • Ask each participant what is their key learning takeaway for today? It may be a difference in the functionality, benefit of the new system…etc. **DO:** • Once everyone had their turn, thank participant for their time. • Remind them to be on time. ***Other wrap-up activities can be found online***

DAY THREE eTIS FUNCTIONAL TRAINING FOR END USERS APPROVERS TRAINING INSTRUCTOR GUIDE (TRS)

REFERENCE	SCRIPT

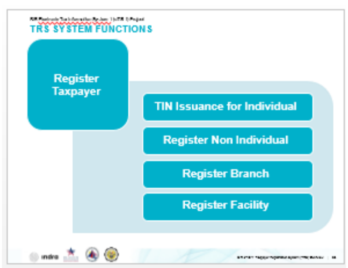
Review of Previous Day's Topics — ***30 minutes***

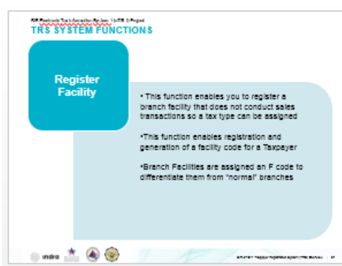
DO:

- Deliver a review activity of previous days' topics.

Other review activity and energizers can be found in the appendix section.

SLIDE # 91-93





Register Facility — ***5 minutes***

SAY:

- Our next function is the Register Facility Function.

ASK:

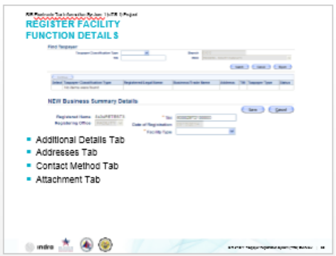
- What do you do for this function?
- What challenges or issues do you usually encounter performing this function?

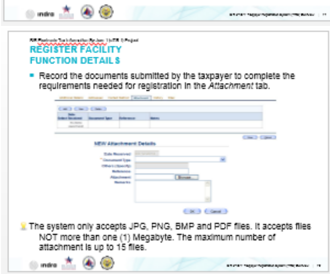
SAY:

- This function enables you to register a branch facility that does not conduct sales transactions so a tax type can be assigned. It also enables registration and generation of a facility code for a Taxpayer Branch Facilities are assigned an F code to differentiate them from "normal" branches.

- To access the function, go to the Navigation panel click on Taxpayer Registration > Register Taxpayer > Register Facility. The Find Taxpayer screen will appear.

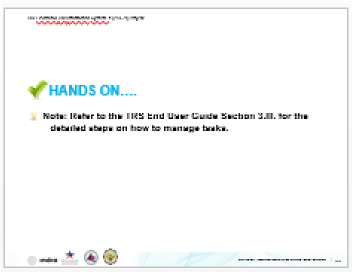
REFERENCE	SCRIPT
SLIDE # 94-98	**Register Facility Function details** *30 minutes*





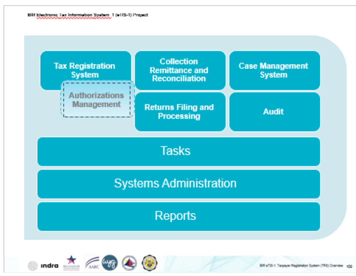
SAY:

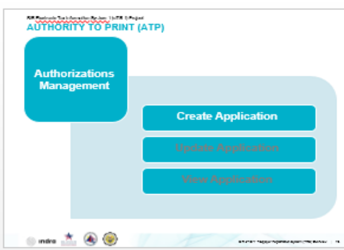
- In the Find Taxpayer screen, search the taxpayer to which the Facility will be registered under. Registration details of the Taxpayer gets auto-populated. You just need to select the Facility type that is applicable. Next fill in the applicable tabs. These would be:
    - Additional Details Tab
    - Addresses Tab
    - Contact Method Tab
    - Attachment Tab
- Fill in all the necessary fields. (Go through each field in the tab). You will be required to specify a date of submission and an RDO.
- In the Addresses tab, encode the addresses provided by the Taxpayer. Click Add and the New Address details window will appear. (Go through each field of the New Address Window). Tick the Primary Indicator field if the Address will be the primary business location of the Taxpayer. Click OK button after.
- Encode the business' contact method details in the *Contact Method* tab.
- The Attachments tab is also pretty much the same as the one when you are registering an Individual or Non-individual Taxpayer. Follow the same process. Remember that the system only accepts JPG, PNG, BMP and PDF files. It accepts files NOT more than one (1) Megabyte. The maximum number of attachment is up to 15 filesTake note that the history and sites tab are not yet included in this version, eTIS-1.

REFERENCE	SCRIPT
	DO: • Allow participants to access the system while you discuss the function. This will provide better understanding and real time experience. • Provide a sample profile to fill in information. .Give participants time to do each step.
SLIDE # 99 	**Register Facility Hands-on Activity** ***15 minutes*** Individual Activity **SAY:** • It's time to try it on your own. Please go to page x of your workbook for the details of your exercise. **DO:** • Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. • Go around the room to help them. **ASK:** • What are the issues that you encounter? • How did you find accessing the system using this function?

REFERENCE	SCRIPT

SLIDE # 100-102





Authorizations Management *5 minutes*

SAY:

- Part of the TRS is the Authorization Management.

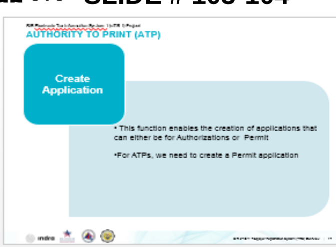
ASK:

- What is Authorization Management?
- What involves this process?

SAY:

- Authorization Management is a function that enables the generation of Permit and Authorization application. It basically supports a Registration process which is the Generation of ATP.
- Under Authorizations Management, there are 3 sub functions. To start with, we need to go the Create Application function. Take note that the update application and view application functions are not yet included in this version, eTIS-1.

SLIDE # 103-104

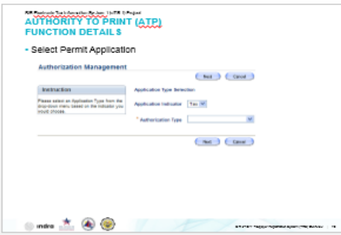


Create Application *30 minutes*

- Part of authorizations management is to create applications. This function enables the creation of applications that can either be for Authorizations or Permit.
- To create application, on the Navigation panel, click on the Authorization Management > Create Application.

REFERENCE	SCRIPT

SLIDE # 105-108



- For ATPs, we need to create a Permit application
  - Let's do a step by step walk-through of the process.
  - To generate an ATP you need to create a Permit Application, so select Permit under Authorization type and click on the Next button.

- You'll find 3 tabs – Application details, Attachments and Footer details. On the Application details, search for the TIN of the Taxpayer who requested the ATP. Click on the Search TIN button. Once the Taxpayer is found select the Taxpayer from the Panel and click on Continue.

- Then select Authority to Print under Type of Authorization. For the Attachments Tab, follow the same procedure as you would in TRS. Just like the Attachments tab in TRS, this tab allows you to upload supporting documents from the Taxpayer. Then click on Next.

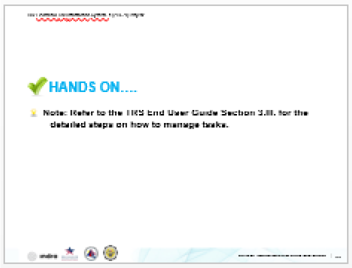
- In the Permit Application screen, enter the printer TIN. You can use the Flashlight icon to search for the printer TIN. Click Save button when done.

DO:

- Allow participants to access the system while you discuss the function.
- Provide a sample profile to fill in information. Give participants time to do each step.

ASK:

- Any clarification on the steps?

REFERENCE	SCRIPT
SLIDE # 109  	**Authority to Print Hands on Activity** ***15 minutes*** Individual Activity **SAY:** - Let's try it out. Please go to page x of your workbook. **DO:** - Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. - Circulate and help students with issues and answer questions. **ASK:** - What are the issues that you encounter? - How did you find accessing the system using this function?

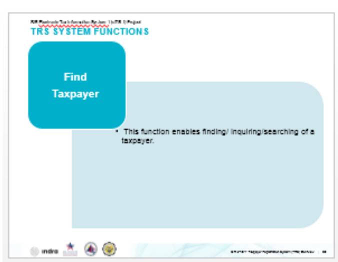
REFERENCE	SCRIPT

Review of Previous Topics — **10 minutes**

SAY:

- Thank you for being here, participants. We had fruitful session yesterday. Let us review what we have discussed. We covered the following:
  - Register Non-Individual
  - Register Branch
  - Register Facility
  - Introduction to Manage Taxpayer
  - Authorizations Management
- Today, we discuss the Manage Taxpayer functions. Let us start!

SLIDE # 110-112



Manage Taxpayer — ***10 minutes***

SAY:

- Now that we are done with the discussion on Register Taxpayer. We proceed to Manage Taxpayer. Again, please note that these functions and the corresponding transactions they enable you to perform can be found in the Navigation Guide section of the End User Manual.

ASK:

- What are the functions that you perform under the Manage Taxpayer?

SAY:

- We will discuss the following functions:
  - Find Taxpayer
  - Update Taxpayer
  - Suspend Tax
  - Re-activate Tax
  - De-register Tax
  - Re-register Tax
  - Transfer Taxpayer
  - Tag/Un-tag Inactive Taxpayer

<table>
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>

SLIDE # 113

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Find Taxpayer ***10 minutes***

SAY:

- To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Find Taxpayer.
- In the Find Taxpayer screen, search the taxpayer by filling in at least one of the given fields. Next fill in the applicable tabs depending on the taxpayer classification type. This follows the same procedure in Register Individual or Non-Individual process.
- For Individuals, these would be (Read through the list of tabs). For Non - individuals, these would be (Read through the list of tabs)

DO:

- Let the students try the function. Give a pre-created profile for them to find.

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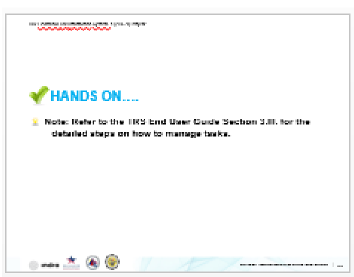
<tr><td>

SLIDE # 114



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Find Taxpayer Hands-on Activity ***10 minutes***

Group Exercise

SAY:

- Try it in groups. Let's have a quick game. Please join your group and choose a workstation.

DO:

- Prepare at least 10 sets of information that participants will have to find for this function. Let the groups look for the taxpayer and the first one to find will earn a point. Information should be correct and accurate.

ASK:

- What are the issues that you encounter?
- How did you find accessing the system using this function?

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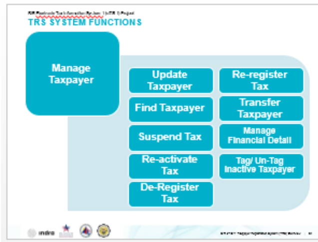
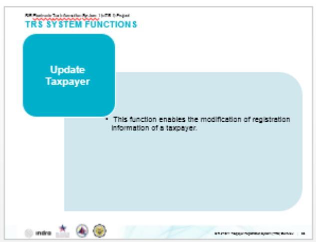
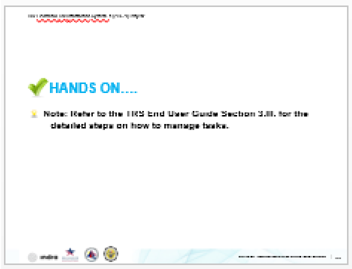
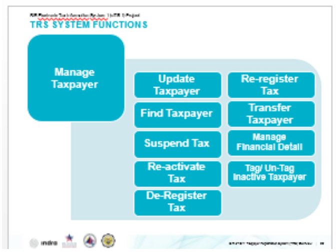
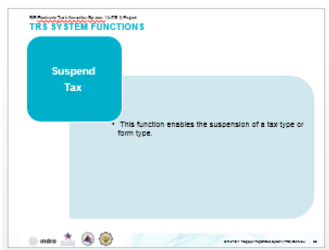
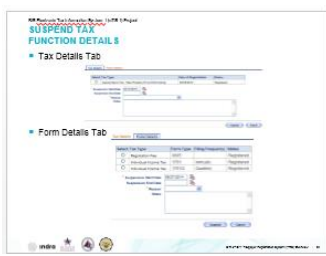
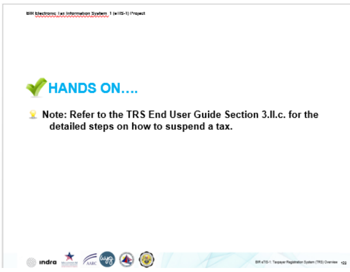
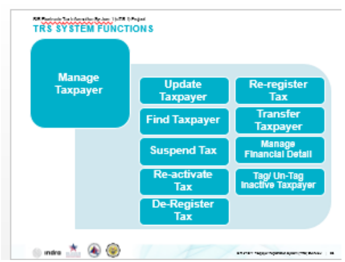
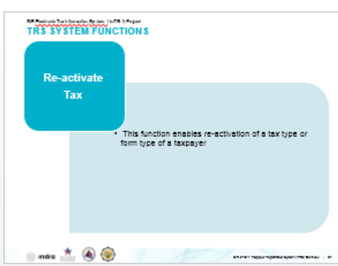
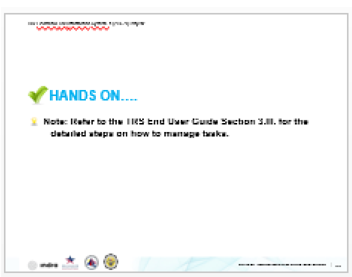
REFERENCE	SCRIPT
SLIDE # 115-116  	**Update Taxpayer** ***2 minutes*** **SAY:** • After being able to find the taxpayer, what we usually do is update the information for each. **ASK:** • How do we do this function in the present system? **SAY:** • Update taxpayer enables the modification of registration information of a taxpayer. In this sub-module, the registration information of a taxpayer may be updated or modified. • Let us go through the steps on this function.
SLIDE # 117 	**Update Taxpayer** ***10 minutes*** **SAY:** • To access the update taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Update Taxpayer. • In the Find Taxpayer screen, search the taxpayer whose information you wish to update. Next fill in the applicable tabs depending on the taxpayer classification type. This follows the same procedure in Register Individual or Non-Individual process. For Individuals, these would be (Read through the list of tabs). For Non - individuals, these would be (Read through the list of tabs) **ASK:** • Do you have any questions and clarifications? **DO:** • Let one of the participant explore the process on their own. Give them information that will perform the function.

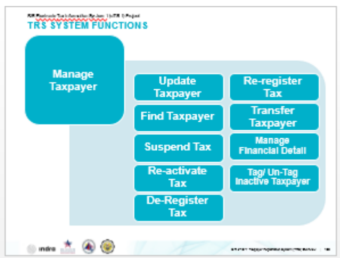
REFERENCE	SCRIPT
SLIDE # 118 	**Update Taxpayer Hands-on Activity** **30 minutes** Individual Activity **SAY:** • It's time to try it on your own. Please go to page x of your workbook. **DO:** • Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. • Go around the room to help them. **ASK:** • What are the issues that you encounter? • How did you find accessing the system using this function?

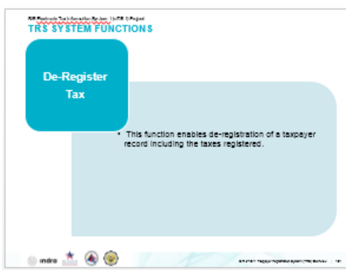
REFERENCE	SCRIPT
SLIDE # 119-120   	**Suspend Tax** ***3 minutes*** **SAY:** - Let us continue with another function for Manage Taxpayer. **ASK:** - How do we suspend tax? - What does the Suspend Tax functionality do? **SAY:** - Suspend tax function enables the suspension of a tax type or form type. - Let's do the steps in this function.
SLIDE # 121  	**Suspend Tax** ***10 minutes*** **SAY:** - To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Suspend Tax - Follow the same procedure in finding a taxpayer. - The Tax Details tab is used to suspend a tax type. Do this by ticking on the radio button and supplying the mandatory fields (Reason selection will depend on the tax type selected).Then click Suspend. Do the same for the Form Details tab to suspend a form type. - A confirmation message notifying that the Tax Type has been suspended and the status will be pending upon approval by RDO and ARDO. **DO:** - Prepare a list of information for the walkthrough. Let the participants navigate and do the function.

REFERENCE	SCRIPT
SLIDE # 122 	**Suspend Tax Hands-on Activity** ***30 minutes*** Individual Activity **SAY:** ▸ It's time to try it on your own. Please go to page x of your workbook. **DO:** ▸ Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. ▸ Go around the room to help them. **ASK:** ▸ What are the issues that you encounter? ▸ How did you find accessing the system using this function?
SLIDE # 123-124  	**Reactivate Tax** ***5 minutes*** **SAY:** ▸ We now move to the fourth function which is Re-activate Tax. **ASK:** ▸ What does the Re-activate Tax functionality do? **SAY:** ▸ This function enables re-activation of a tax type or form type of a taxpayer.

REFERENCE	SCRIPT
SLIDE # 125 	**Reactivate Tax** ***10 minutes*** **SAY:** ▸ To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Reactivate Tax. ▸ There are 2 tabs that you should consider when performing this function. The tax details and Form details. ▸ Follow the same procedure in finding a taxpayer. The Tax Details tab is used to re-activate a tax type. Do this by ticking on the radio button and supplying the mandatory fields. Then click Reactivate. Do the same for the Form Details tab to re-activate a form type. You will be required to specify a date of reactivation and a reason. The reason selection will depend on the selected tax type or form type. **ASK:** ▸ What makes this new system step different from the current system? **DO:** ▸ Prepare at least 3 sets of information that participants will encode for this function.
SLIDE # 126 	**Reactivate Tax** **Hands-on Activity** ***30 minutes*** **SAY:** ▸ We will be providing you an exercise sheet to be used for this Hands On Activity. **DO:** ▸ Prepare at least 5 sets of information that participants will encode for this function. Let the participants input all the information using the system. ▸ Go around the room to provide help and answer questions on the steps. **ASK:** ▸ What are the issues that you encounter? ▸ How did you find accessing the system using this function?

REFERENCE	SCRIPT
SLIDE # 127-128	**De-Register Tax** *5 minutes*





SAY:

- Another function under the Manage Taxpayer is de-register tax.

ASK:

- What does the De-Register Tax functionality do?

SAY:

- This function enables de-registration of a taxpayer record including the taxes registered.

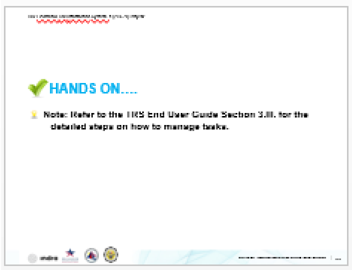
REFERENCE	SCRIPT
SLIDE # 129	**De-Register Tax** *10 minutes*

SAY:

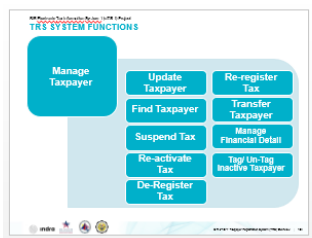
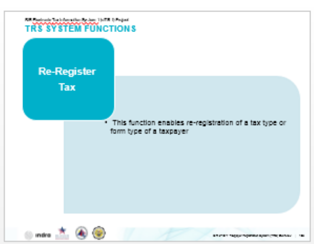
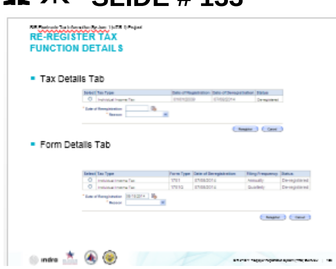
- To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and De-Register Tax.
- This has the same procedure in finding a taxpayer. The Deregistration Details tab is used to deregister tax details. Do this by ticking on the checkbox of the tax type to deregister. Should you wish to deregister the taxpayer record including the taxes registered, tick the Deregister Taxpayer and all Tax check box. Then click Deregister. Follow the previous procedure for the Form Details tab.

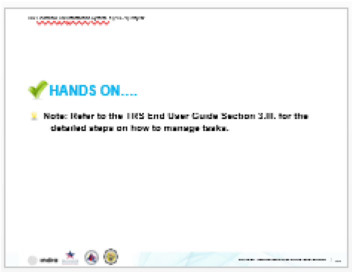
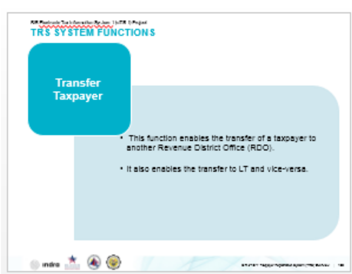
DO:

- Prepare at least 3 sets of information that participants will encode for this function. This will allow them to experience the function first hand for better understanding.

REFERENCE	SCRIPT
SLIDE # 130  	**De-Register Tax Hands-on Activity** ***30 minutes*** **SAY:** - Let's now proceed to the Hands On activity. We will be providing you an exercise sheet to be used for this Hands-on Activity. **DO:** - Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. - Go around the room to help them. **ASK:** - What are the issues that you encounter?
	Wrap Up & Closing ***30 minutes*** **ASK:** - That concludes our Day 3 of eTIS Training? How do you find it so far? - Ask each participant what is their key learning takeaway for today? It may be a difference in the functionality, benefit of the new system…etc. **DO:** - Once everyone had their turn, thank participant for their time. - Remind them to be on time. ***Other wrap-up activities can be found online***

DAY FOUR eTIS FUNCTIONAL TRAINING FOR END USERS
APPROVERS TRAINING INSTRUCTOR GUIDE (TRS)

REFERENCE	SCRIPT
	**Review of Previous Day's Topics** ***30 minutes*** **DO:** ▸ Deliver a review activity of previous days' topics. ***Other review activity and energizers can be found in the appendix section.***
SLIDE # 131-132  	**Re-Register Tax** ***5 minutes*** **SAY:** ▸ When you de-register tax, how do we re-register tax? This will be the next function. ▸ This function enables re-registration of a tax type or form type of a taxpayer.
SLIDE # 133 	**Re-Register Tax** ***10 minutes*** **SAY:** ▸ To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Re-Register Tax. ▸ From the same menu function with finding taxpayer, follow the same procedure for the Tax Details tab and the Form Details tab. Then click Reregister.

REFERENCE	SCRIPT
	DO: ▸ Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system.
SLIDE # 134  	**Re-register Tax Hands-on Activity** ***30 minutes*** **SAY:** ▸ Let's proceed with our hands-on activity. This time on your own. Kindly go to page x of your participant guide and follow the instructions provided. **DO:** ▸ Prepare at least 3 sets of information that participants will encode for this function. **ASK:** ▸ What are the issues that you encounter? ▸ How did you find accessing the system using this function?
SLIDE # 136  	**Transfer Taxpayer** ***5 minutes*** **ASK:** ▸ A taxpayer goes to the RDO asking for a transfer, what do we do? ▸ What form are you using? ▸ How do you complete the task? **SAY:** ▸ In the event that a taxpayer may need to be transferred to another RDO. This is the function that we do. This function enables the transfer of a taxpayer to another Revenue District Office (RDO).It also enables the transfer to LT and vice-versa.

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<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>

SLIDE # 137

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Transfer Taxpayer ***10 minutes***

SAY:

- To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer and Transfer Taxpayer
- In Transfer Details tab, input details on mandatory fields. Again, the fields with a red asterisk mean that they are mandatory fields and the transaction cannot proceed without these information. In the Attachment tab, follow the previous procedure for attachments. Then click Transfer.

DO:

- Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system.
- Entertain questions to help participants in the walk-through.

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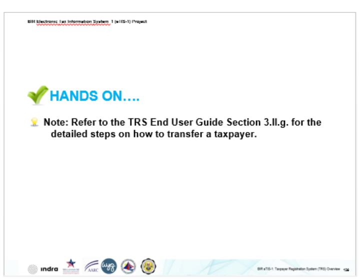
SLIDE # 138



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Transfer Taxpayer Hands-on Activity ***30 minutes***

SAY:

- It's time to try it on your own. Kindly go to page x of your participant guide and follow the instructions provided.

DO:

- Prepare at least 5 sets of information that participants will encode for this function. Let the participants input all the information using the system.
- Go around the room to help them.

ASK:

- What are the issues that you encounter?
- How did you find accessing the system using this function?

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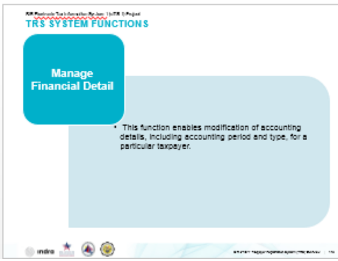
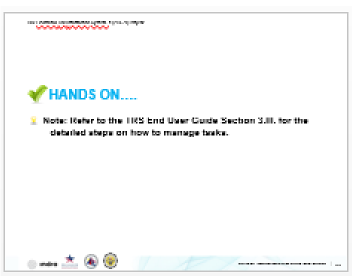
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>SLIDE # 140
</td><td>Manage Financial Detail 5 minutes

ASK:
How do you perform this function? Please enumerate the steps in your current system.

SAY:
Manage Financial Detail enables modification of accounting details, including accounting period and type, for a particular taxpayer.</td></tr>
<tr><td>SLIDE # 141
</td><td>Manage Financial Detail 10 minutes

• To access the find the Taxpayer menu, go to the navigation panel, click on Taxpayer Registration, then Manage Taxpayer Manage Financial Detail.

• In New Financial Details section, input details on mandatory fields. Then click Save to process the changes of taxpayer record.

DO:
• Prepare information that participants will encode for this function walk through.</td></tr>
<tr><td>SLIDE # 142
</td><td>Manage Financial Details Hands-on Activity 30 minutes

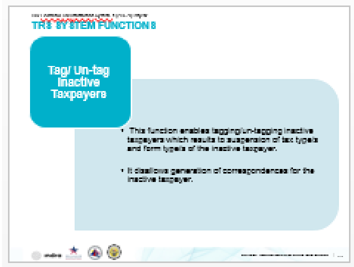
Paired Exercise

SAY:
• It's time to try it with a partner. Kindly go to page x of your participant guide and follow the instructions provided.

DO:
• Prepare at least 5 sets of information that participants will encode for this function. Let the participants input all the information using the system.
• Go around the room to help them.
• Talk among your partner and share views on the procedure. Use the guide questions:
    o What are the issues that you encounter?
    o How did you find accessing the system using this function?</td></tr>
</table>

<table>
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>

SLIDE # 144



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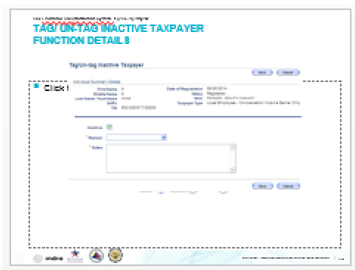
Tag/ Un-Tag Inactive Taxpayer ***10 minutes***

SAY:

- The last function for Manage taxpayer is Tag/ Un-Tag Inactive Taxpayer. This function enables tagging/un-tagging inactive taxpayers which results to suspension of tax type/s and form type/s of the inactive taxpayer. It disallows generation of correspondences for the inactive taxpayer.

</td></tr>
<tr><td>

SLIDE # 145



</td><td>

Tag/ Un-Tag Inactive Taxpayer ***10 minutes***

SAY:

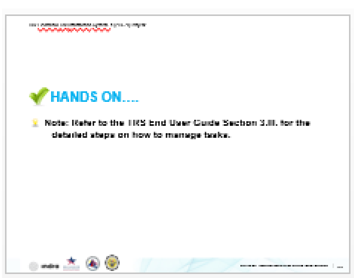
- It works the same with all the other functions using the In Tag/ Un-tag Inactive Taxpayer screen, input details on mandatory fields. Then click Save to process the changes.

DO:

- Prepare information that participants will encode for this function walk through.
- Go around the room to help them.

</td></tr>
<tr><td>

SLIDE # 146



</td><td>

Tag/ Un-Tag Inactive Taxpayer
Hands-on Activity ***30 minutes***

SAY:

- Let's now proceed to the Hands On activity. Kindly go to page x of your participant guide and follow the instructions provided.

DO:

- Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system.

ASK:

- What are the issues that you encounter?
- How did you find accessing the system using this function?

</td></tr>
</table>

REFERENCE	SCRIPT
	Recap *30 minutes* **Group Activity** **SAY:** • Let us have a group activity wherein we will have a chance to evaluate the process. **ASK**: • What are the different function in Manage Taxpayer process? • What are views and comments in the steps in the new system? **DO:** • Group participants into 3 groups. Make sure that they have different members than the last group activity. • Ask them to create a visual representation of the different functions and steps. • Let them assign a representative to present the visuals. • This will serve as a recap.
	Wrap Up & Closing *30 minutes* **ASK:** • That concludes our Day 3 of eTIS Training? How do you find it so far? • Ask each participant what is their key learning takeaway for today? It may be a difference in the functionality, benefit of the new system…etc. **DO:** • Once everyone had their turn, thank participant for their time. • Remind them to be on time. ***Other wrap-up activities can be found online***

DAY FIVE– eTIS FUNCTIONAL TRAINING FOR END USERS APPROVERS / FULL TRAINING INSTRUCTOR GUIDE (TRS)

REFERENCE	SCRIPT

Review of Previous Day's Topics *30 minutes*

DO:

- Welcome back, participants! We have discussed Manage taxpayer yesterday. Let us recap the processes we have gone through. We have discussed the following:
  - Find Taxpayer
  - Update Taxpayer
  - Suspend Tax
  - Re-activate Tax
  - De-register Tax
  - Re-register Tax
  - Transfer Taxpayer
  - Manage Financial Detail
  - Tag/Un-tag Inactive Taxpayer
- Today, we will cover Task Management and Reports Generation. Under this module we will discuss the following:
  - Tasks
  - Correspondences
  - Reports

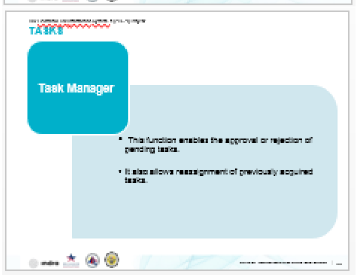
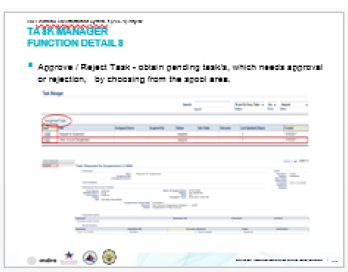
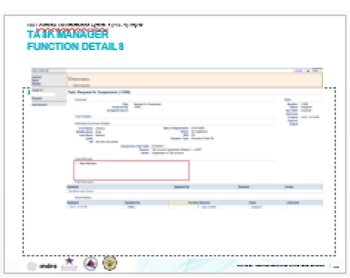
DO:

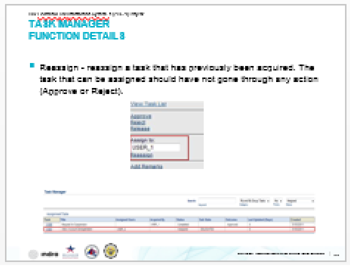
- Allow a representative to tick the process they have listed from the first activity on day 1.

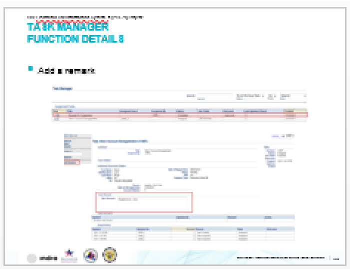
ASK:

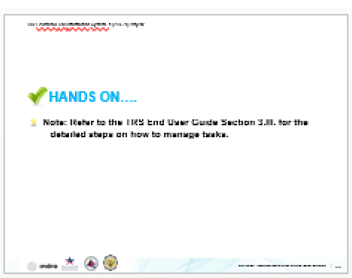
- Do you have any questions on our past topics?

Other review activity and energizers can be found in the appendix section.

REFERENCE	SCRIPT
SLIDE # 148-149  	**Task Manager** ***3 minutes*** **DO:** - Task manager is a function that enables the approval or rejection of pending tasks. It also allows reassignment of previously acquired tasks. - Let us go through each step in performing the task. **NOTE: The Task Manager will only be discussed for Approvers Training.**
SLIDE # 150-153  	**Task Manager Function Details** ***30 minutes*** **SAY:** - To access the Task Manager Function, go to the Navigation Panel and click on Tasks then Task Manager. - Let us go the first step. The Approve / Reject Task - obtain pending task/s, which needs approval or rejection, by choosing from the spool area. - To do this, go to the Assignment table, find and select a pending transaction by clicking on the Task Number link. Then click on the Acquire link to accept the task and enable approval/rejection action option. Then, a message will appear to inform you that the task has been acquired. - An information message will appear to inform that the task has been acquired. Hence, additional links will also be a viable option to utilize. Afterwards, indicate comments inside the New Remarks box which should contain the reason for the appropriate action to be taken. Then click on the appropriate action link – approve, reject or release. If you wish to return to the Assignment table, click View Task List.

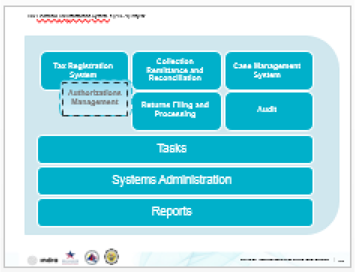
<table>
<tr><th>REFERENCE</th><th>SCRIPT</th></tr>
<tr><td>


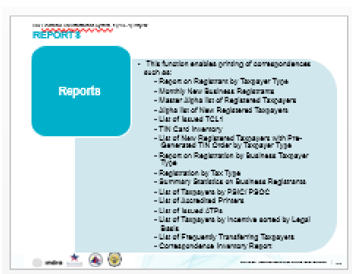


</td><td>
To reassign a task, type in the log in name of the person that the task is being assigned to inside the Assign to box. Again, if you wish to return to the Assignment table, click View Task List. In this screen, view that the Status is again Assigned but with a definite Assigned User and a Sub State Delegated.
To place additional information on a specific task, select the task from the list. Then task details screen will appear. Type the additional details on the New Remark box and click on the Add Remarks link.
DO:
Prepare a sample profile for the participants to test out. Make this discussion as a walk-through for them to have first-hand experience navigating the system.
ASK:
Can you follow the steps?
Are there difficulties that you prevents you to do the task smoothly?
</td></tr>
<tr><td>
SLIDE # 154


</td><td>
Task Manager Hand-on Activity 60 minutes
SAY:
Let us have a hands-on activity. Kindly go to page x of your participant guide and follow the instructions provided.
DO:
Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system.
ASK:
What are the issues that you encounter?
How did you find accessing the system using this function?
</td></tr>
</table>

REFERENCE	SCRIPT
SLIDE # 155-156	**Reports** ***30 minutes***





SAY:

- Now that we have control on our tasks, at the end of the day what we usually do is to generate reports.

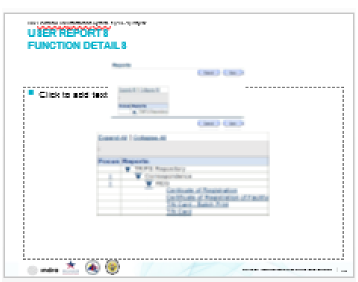
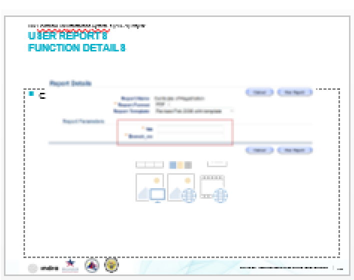
ASK:

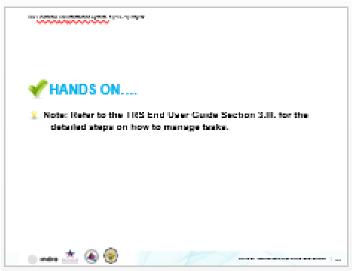
- What is the scope of the reports generation function?

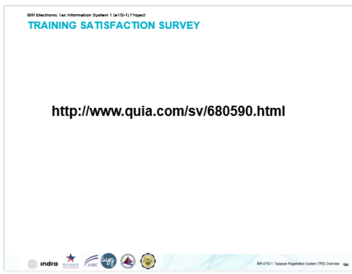
SAY:

- This function enables printing of correspondences such as:
    - Report on Registrant by Taxpayer Type
    - Monthly New Business Registrants
    - Master Alpha list of Registered Taxpayers
    - Alpha list of New Registered Taxpayers
    - List of Issued TCL1
    - TIN Card Inventory
    - List of New Registered Taxpayers with Pre-Generated TIN Order by Taxpayer Type
    - Report on Registration by Business Taxpayer Type
    - Registration by Tax Type
    - Summary Statistics on Business Registrants
    - List of Taxpayers by PSIC/ PSOC
    - List of Accredited Printers
    - List of Issued ATPs
    - List of Taxpayers by Incentive sorted by Legal Basis
    - List of Frequently Transferring Taxpayers
    - Correspondence Inventory Report

- Let us now discuss the user reports.

REFERENCE	SCRIPT
SLIDE # 158 	**User Reports** ***2 minutes*** **SAY:** • User reports is a function enables searching, viewing and printing of document reports. • Let us go through the steps in performing the function.
SLIDE # 159-161   	**User Reports Function Details** ***10 minutes*** **SAY:** • To access the Task Manager Function, go to the Navigation Panel and click on Tasks then Task Manager. • In the Reports screen, type in your password. This is the same password as the one you use for logging in. Then click Connect to Report Server button. • In the Reports screen, click on Expand All to show all the sub-reports/ correspondence. Otherwise, click Collapse all to hide all the sub-reports/ correspondence. Then click on the arrow facing to the right to request for COR and TIN card. • Here, you may select on the specific correspondence that you wish to view or print. • Finally in the Report Details screen, fill out all mandatory fields. Then click on the Run Report button to generate the report.

REFERENCE	SCRIPT
	DO: ▸ Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system. **ASK:** ▸ Do you have any questions or are all the steps clear?
SLIDE # 162  	**Generate Reports Activity** ***60 minutes*** **SAY:** ▸ Let us have a hands-on activity. Kindly go to page x of your participant guide and follow the instructions provided. **DO:** ▸ Prepare at least 3 sets of information that participants will encode for this function. Let the participants input all the information using the system.
	Wrap-Up ***120 minutes*** **SAY:** ▸ That concludes our eTIS-1 Functional Training for the Tax Registration System. ▸ I'll be giving you 1.5 hours to review and practice utilizing the system. After which, we will have an assessment. In order to pass the assessment, you have to get a score of 80%. If you fail the first take, you are allowed to take it 2 more times. The exam would be open book.
SLIDE # 163  	**Assessment & Closing** ***120 minutes*** **SAY:** ▸ That concludes our eTIS-1 Functional Training for the Tax Registration System. ▸ I'll be giving you 1.5 hours to review and practice utilizing the system. After which, we will have an assessment. In order to pass the assessment, you have to get a score of 80%. If you fail the first take, you are allowed to take it 2 more times. The exam would be open book. **Assessment link: http://www.quia.com/quiz/4986569.html**

REFERENCE	SCRIPT
SLIDE # 164  	**Training Satisfaction Survey** ***30 minutes*** **DO:** Ask participants to complete the training satisfaction survey. Thank the customer for their time and remind them **http:/ /www.quia.com/sv/680590.html/**

PRESENTATION SLIDES
TAXPAYER REGISTRATION SYSTEM