



FAP – DAC7 user manual

Financial Administration Portal

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1. Introduction

The **DAC7 zone** is a separate zone of the Financial Administration Portal (FAP), that provides DAC7 users or FAP users with access to electronic services and data for the application of specific DAC7 adjustments (**obligations arising from the Act No. 442/2012 Coll. on International assistance and Cooperation in Tax Administration** as amended). The module provides services related to the interaction between the DAC7 customer and the individual financial administration agendas requiring user authentication. The DAC7 gives the user access to electronic services, messages and personal settings.

The following services are grouped into theme parts:

- 1) **Communication history**– the service displays the electronic communication history in the form of a list of sent, received and unsuccessfully sent documents of the selected DAC7 customer.
- 2) **Catalogues** – complex services related to the administration of DAC7 electronic forms.
- 3) **Concepts** – the service provides an overview of the submissions that are in progress stored in the financial administration portal for further use/completion by the same or other users authorized to act as a DAC7 customer.
- 4) **Inbox** – the service allows the logged user to view the selected list of messages in the electronic inbox, the detail of individual messages, and change the message signs as read and archived messages. Paged list of messages is always created in a user -> customer relationship, with unread and read messages being visually differentiated.
- 5) **DAC7 connections** — displays all DAC7 connections for the logged-in user to individual DAC7 customers. A connection means that the user can act for the DAC7 customer with which the connection is set.
- 6) **User Profile** — the service makes the display of user profile items available. The service also provides access to the change of contact details, password, and set user email notifications.
- 7) **Customer file** — the purpose of the service is to allow the user to make the file available to the customer containing the documents created by the communication between the customer and the financial administration.
- 8) **Authorized services**– the tile of authorized services allows the FAP user to return to PIZ.


2. Used terms and abbreviations

Term / abbreviation		Description
EU	Abbreviation	European Union
FA	abbreviation	Financial Administration
User ID	abbreviation	The user ID for log-in to a personal Internet zone or to a DAC7 zone for the use of FA electronic services is generated by the system
PIZ	abbreviation	Personal Internet zone
DAC7	abbreviation	Council Directive (EU) 2021/514 (called DAC7) amending the Directive 2011/16/EU. Represented in FAP by a separate application that provides DAC7 zone users or FAP users with access to electronic services and data for the application of the activities of the platform operator (DAC7).
FAP	abbreviation	Financial Administration Portal
DAC7 user	term	The user acting for a DAC7 customer registered for electronic communication through DAC7 zone in FAP (with ID assigned)
FAP user	term	User of FAP registered for electronic communication via PIZ in FAP (ID assigned)
User logged in	term	DAC7 user or FAP logged in to DAC7
DAC7 customer	term	Tax entity registered under the special scheme of the DAC7
DAC7 zone	term	DAC7 area that provides access to the registered user to DAC7 electronic services

3. Entering the DAC7 zone

Only registered DAC7 and FAP users are allowed access to DAC7 zone. If the registered FAP user already has an ID assigned, this ID is used for login. There is no need to re-register for DAC7 and assign another ID.

3.1.1 DAC7 user login to the DAC7 zone

- 1) *The user* in the FAP Home screen selects the option with the button .
- 2) The system displays a screen to select the login method.

Login methods to the FA Portal

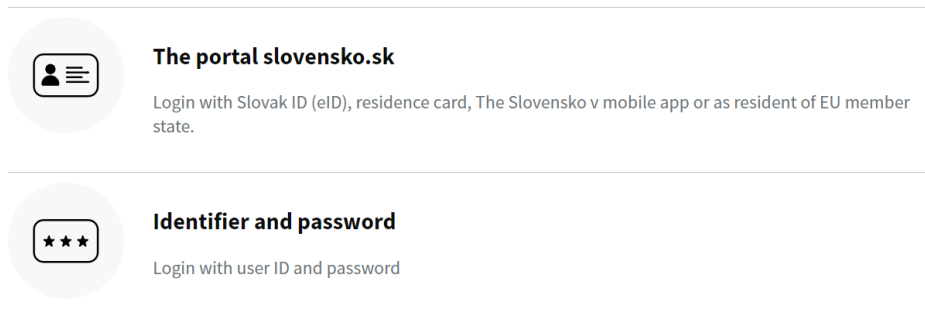


Figure: Login screen


- 3) In order to log in to **DAC7 zone**, the Registered user selects the “Identifier and password” (the only possible way to log in to DAC7 for the DAC7 user).

Login – Identifier and password

- 1) *The DAC7 user* selects the option with the "Identifier and password" button. The system displays a screen for entering the login data:

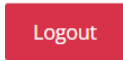
Item name	Completion obligation	Method of completion
User ID	Mandatory	Enter a text string – 7 digit number
Password	Mandatory	Enter a text string – min. 8 characters, min. 1 character from the set [a-z], min. 1 character

		from the set [A-Z], min. 1 number from the set [0-9], do not use diacritics or gaps.
--	--	--

- 2) *The DAC7 user* selects the option using the button  .
- 3) After successful authentication verification, the DAC7 zone is made available.
- 4) The top bar shows the user name of the *Logged-in user*, his user ID and a log-off


button, for example   .

N.B.: In case of a long name, the first 18 characters from the name are displayed, followed by three dots and the user ID. When moving the mouse over the name, the full name will be displayed in the bubble help.

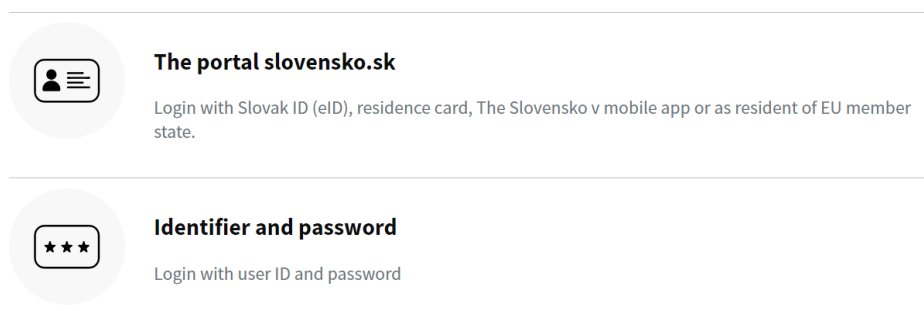
- 5) *The Logged-in user* completes the work in the DAC7 zone with  .

3.1.2 FAP user login to the DAC7 zone

The registered FAP user can also log in to the DAC7 zone.

- 1) *The FAP user* selects the option with the button  in the FAP Home screen.
- 2) The system displays a screen to select the login method.

Login methods to the FA Portal



[< Back to Main page](#)

Figure: Login screen

- 4) Any of the above login methods can be used to log in.
- 5) After logging in, the system displays the page "Selecting customer for PIZ set-up". (*If the authorization is for one customer, the customer PIZ will be displayed*).

- 6) The user selects Continue without subject selection – continues with point 8)
- 7) In case PIZ is displayed, the user confirms it with Subject selection (above the tiles) and then continues with the button "Continue without customer selection" on the page "Selecting customer for PIZ set-up".
- 8) The system displays PIZ in mode without the FAP customer context. The Authorized Services tile contains the link "DAC7" to enter the DAC7 zone.

Autorizované služby >

[OSS](#)

[DAC7](#)

- 9) The FAP user clicks on the link "DAC7".
- 10) After finishing work in DAC7, the FAP user will use the "Return to PIZ" link in the Authorized Services tile to return to the PIZ.

Authorized services >

[Return to OIZ \(PIZ\)](#)

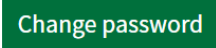
3.2 Forgotten password/Generate password

- 1) *The DAC7 user* selects [Forgotten Password/Generate password](#) option to generate a new password by filling in the Forgotten password form data displayed by the system:

Item name	Completion obligation	Method of completion
User ID	Mandatory	Enter a text string
Email	Mandatory	Enter a text string
Captcha	Mandatory	Rewrite the text from the picture/ from the audio recording for the blind
Show another picture	Optional	Click on the link

- 2) *The DAC7 user* clicks on the button Send.
- 3) A link to complete the password change process will be sent *to the DAC7 user* to the entered email that that is identical to the current user email address registered in the system. Otherwise, the system displays an error message about the mismatch between the entered data and the registered data.

4) The user opens a link and then fills in the required data – User ID, New Password and New Password confirmation.

5) The user clicks on the button 

6) When logging in again, the user will enter a new password and will be logged in to the DAC7 zone.

3.3 Customer selection to set up the DAC7 zone

1) *The user* logged in using one of the methods listed in the chapter 3.1.1 / 3.1.2.

2) The system displays the DAC7 zone for the user:


a) If the user has no DAC7 connection, "No DAC7 connection" will be displayed in the top bar of the DAC7 zone.

 → DAC7

Without selected subject

b) If the user has a DAC7 connection just to one customer – the top bar of the DAC7 zone displays the customer's VAT number (if the customer reported it) and the name of the customer in the context of which the user is logged in

 → DAC7

 Subject selection

c) if the user has a connection to more than one customer, the system displays a page for customer selection to set up DAC7.

Subject selection for DAC7 set up

Choice of procedure:

DAC7 connections

after marking, you will see a list of subjects for which you have valid DAC7 connections

Subject access:

Tax ID

Business ID

Business name

Address

Set up

Continue without subject selection

Continue without subject selection

Entry into the DAC7 zone without selecting the subject on whose behalf resp. for which you are authorized to act.

Figure: Display for customer selection to set up DAC7

- 3) *The logged-in user* selects the DAC7 customer in the context of which he wants to work from the "customer selection" drop-down list and confirms the selection with the button **Set up**.
- 4) The system makes the DAC7 zone available for the logged-in user and the selected DAC7 customer.

Change of selected customer can be done by the logged-in user with the button **Subject selection**. Change of selected customer can be done by the logged-in user by clicking on the "customer selection" button, the system opens a screen for selecting the customer where the user can perform and confirm the customer change.

3.4 Main menu – logged-in user

The *logged-in user* can also access the fields from the main menu, available to all FAP users, also those not logged in.

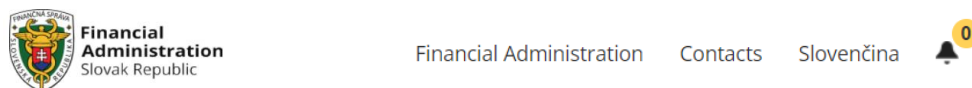




Figure: Main menu

- 1) **Financial Administration** – the system displays general information about the financial administration, especially its structure and bodies.
- 2) **Forms** – the service provides a list of both current and older customs and tax documents used in customs and tax proceedings, which cannot be sent electronically.
- 3) **Contacts** – the sub-page contains contacts and information about communication possibilities with FA.
- 4) **English** – switch DAC7 to English language localization.
- 5) **Bell**  – selecting the **bell** button option displays a list of technical messages at the top of the FAP page (e.g. concerning the FAP shut-down etc.). The number at the button shows the number of messages. Display of information will be cancelled by clicking the "bell" button again.

The *user* clicks the name of the logged-in user, for example [Patrik Mráz 2017855](#) . The system displays the main display of DAC7 zone.

The *logged-in user* can get to the FAP main page from any sub-page by clicking on the

FA logo  . The system displays the FAP main page, accessible to all users, i.e. also not logged-in (so-called publicly available zone – PAZ).

3.5 DAC7 zone

The basic menu of the DAC7 zone is divided into colour-coded zones (tiles):

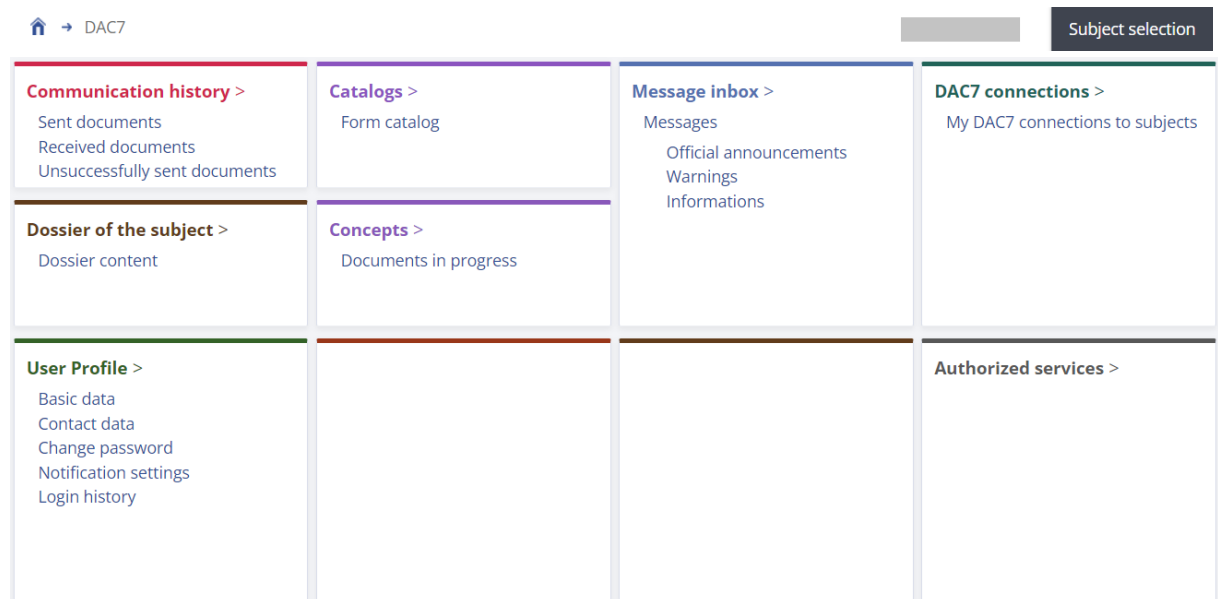


Figure: DAC7 tiles

3.6 Description of control in the DAC7 zone

Tile selection

The user selects which tile he wants to work with by placing the mouse cursor on a specific tile. The user selects, e.g. Communication history – Received documents. Clicking on the tile displays the Received documents.

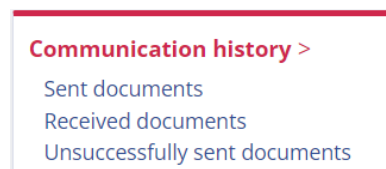


Figure: Tile Communication history

Lists — search criteria

The system provides the option to filter the lists for ease of reference. For example, to find a specific form in the Form catalogue, the following filter screen is available:

Electronic forms catalog

Search criteria

Domain: Agenda:

Form version name:

Display old versions as well


Figure: Find forms

1) A logged-in user can specify the search by entering search criteria:

Item name	Completion obligation	Method of completion
Area	Optional	Selection from the list
Agenda	Optional	Selection from the list
Form version name	Optional	Enter a text string
Display old versions as well	Optional	Check box

2) The Logged-in user confirms the selection by the button to display the list according to the specified filtering conditions.

3) The system has saved forms in a tree structure. If the Logged-in user wants to open and work with a form, it is necessary to click on each category (agenda).

4) The Logged-in user sets the mouse cursor, for example, to the selection button  and clicks to enter the sub-level of the agenda.




▼ Submission for FA - Tax administration		
▼ General filing for DAC7		
VP_DAC7	General filing for DAC7	

Figure: List of forms

5) The Logged-in user displays the form by clicking on the icon  .

Selection of a specific entry from the list

- 1) If the *Lodged-in user* wants to select a specific record from the list, it must be marked by clicking in the line of that record – e.g. Inbox – Messages – Search results – see fig. below.
- 2) The system activates the possible options valid for the selected record (e.g. functionality **Archive message**) that is not available unless the user marks the record according to item 1.
- 3) In order to display the detail of a specific item in a list, the *user* uses the icon  that is usually located at the end of the line with the corresponding record.






Mark	Priority	Date sent	For subject	Agenda	Message type	Subject of the message	Action
<input type="checkbox"/>							
<input type="checkbox"/>	↓	1/10/2023 2:07:27 PM		Submission for FA - Tax administration	Information	Správa o prijatí podania v EP	
<input type="checkbox"/>	↓	1/10/2023 11:35:51 AM		Submission for FA - Tax administration	Information	Správa o prijatí podania v EP	

Figure: Reports – search results

View page

If the system displays a list on more than one page, you can scroll through each page using the bar at the bottom of the list: View site:  .

Bubble help (tooltip)

After you have set the mouse cursor to the icons , , , the system will display a help in the form of a bubble help (tooltip).

For example: the zoom icon is displayed in the inbox -  .

The information windows contain an explanation of the basic terms and a description of individual operations that can be carried out in each part of the system.

4. User profile

View basic user data, access to change password, contact information, notification settings and login history.

4.1 Basic data

- 1) *The Logged-in user* selects the tile **User profile/Basic data** in the menu.
- 2) The system displays a window with the basic data of the *Logged-in user*:
 - Degree,
 - Name and surname,
 - Type of identifier (one of the data – birth number, passport number, identification number) – depending on which data was entered during DAC7 user registration,
 - Address.

Basic data

Title:	Ing.
Name and Surname:	[REDACTED]
Personal Identification Number(PIN):	[REDACTED]
Address:	Komenského 20 06901 Snina Slovensko

Figure: User Profile / Basic data

4.2 Contact data

- 1) The Logged-in FAP *user* selects the tile **User profile/Contact data** in the menu.

- 2) The system displays a window with contact data of the *Logged-in user*.

Item name	Completion obligation	Method of completion
E-mail	Mandatory	Fill the field
Password to verify email change	Mandatory for email change	Fill the field
Telephone No.	Optional	Fill the field

Contact data

E-mail:

Enter your e-mail address for electronic communication in the correct format in the range of max. 254 characters.

E-mail verified

Verification password for changing e-mail:

You need to enter your password when changing your e-mail.

Phone number:

Enter your phone number in the international format +421 yyy xxx xxx (where yyy represents the call prefix) In case of a mobile phone present it in the form of +421 9yy xxx xxx.

[Save contact data](#)

Figure: User profile / Contact data

Change email address

- 1) The *Logged-in user* enters a new email address. Once an email address is entered, the user must enter his password (used by the registered user for logging into DAC7 or PIZ zone) in the field Password for email verification, and then confirm the selection with [Save contact data](#).
- 2) The message "Contact data changed" appears:


 Contact data has been changed

Figure: Information about successful data change

- 3) In case the user entered an incorrect password, the message "Password to verify change of email address is incorrect." will be displayed:

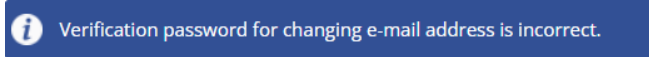


Figure: Information about incorrect password entry

- 4) An e-mail is sent to the Logged-in user to the new e-mail address *Verify the email address entered in FAP*, with the text:

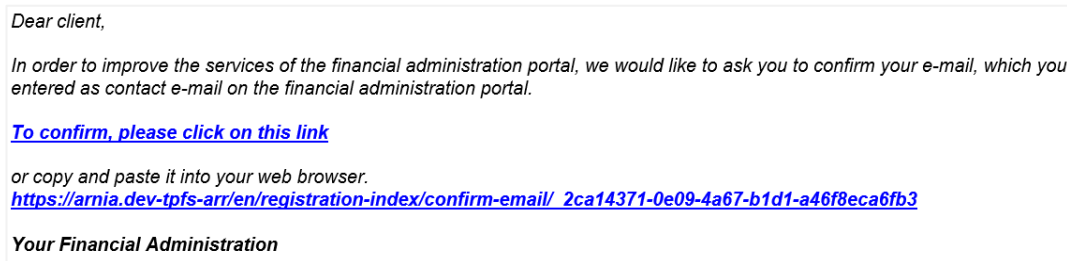


Figure: Email "Verify the email address entered in FAP"

- 5) Until the validity of email address is verified, email displays a warning: **E-mail unverified**.

Note: If the user has entered an incorrect email address format, an alert will be displayed | **Wrong email address format**. and it will not be saved.

- 6) *The Logged-in user* confirms the link in FAP *Verify the email address entered in FAP*, which will allow the email to be activated successfully and will display a message:

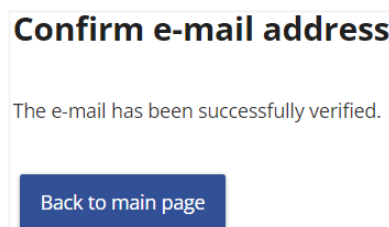


Figure: Information about successful email verification

- 7) At the same time, an email is sent to the user with the subject *Confirmation of email address verification entered in FAP*, with the text:

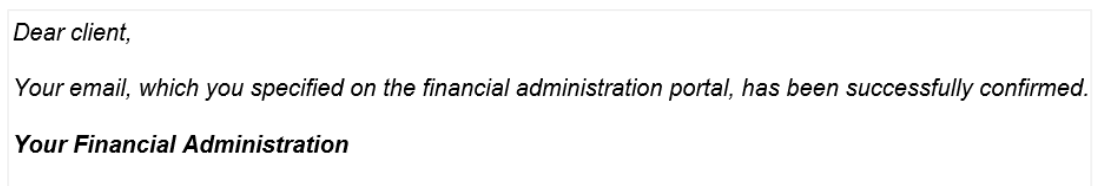


Figure: Email "Confirmation of email address verification entered in FAP"

8) After the *User Profile/Contact data* screen has been reloaded, *Email* item displays the information **E-mail verified** .

Note: If the link has already **been used**, a message will appear when you click it again:

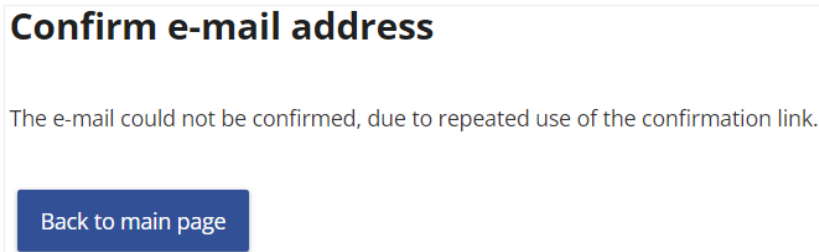


Figure: Information about email verification failure

and at the same time an e-mail *Used activation link* is sent to the user, with the text:

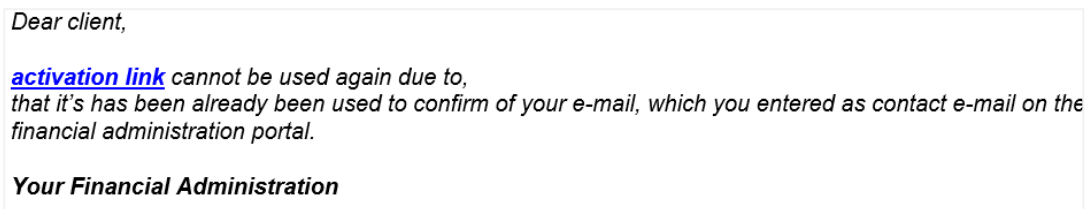


Figure: Email "Used activation link"

Note: If the user changes the email address, the user confirms the selection with the "Save contact details" button, but does not confirm the link to enable the email address in the received email, and then enters a new email address and confirms the selection with the Save contact details button; **the link in the first e-mail received** will be invalid. If an invalid link is confirmed, a message will appear:

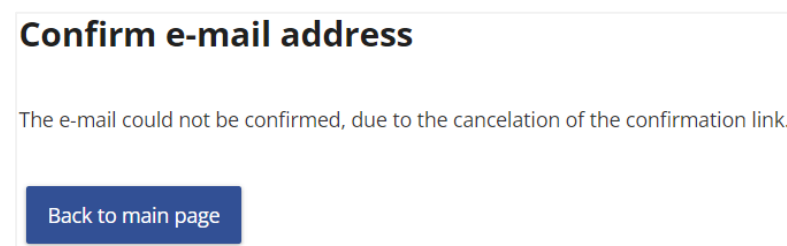


Figure: Information about email verification failure

and at the same time an email is sent to the user *Activation link cancelled* with the text:

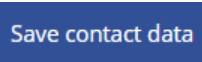
Dear client,

[activation link](#) can no longer be used because it was canceled, as we have noticed another change in your contact e-mail on the financial administration portal.

Your Financial Administration

Figure: Email “Cancelled activation link”

Change telephone number

- 1) The *Logged-in user* enters the new phone number in the format as in help and then presses confirm .
- 2) The message "Contact data changed" appears:

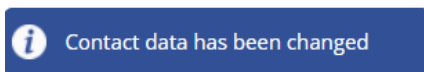


Figure: Information about successful telephone number change

Note:

If the user has entered incorrect phone number format, **Incorrect phone number format** alert will be displayed and a new telephone number will not be stored.

4.3 Change password

- 1) The *Logged-in user* selects the tile **User profile/ Password change** in the menu.
- 2) The system displays a window with the option to change the password.

Item name	Completion obligation	Method of completion
Original password	Mandatory	Fill the field
New password	Mandatory	Fill the field
New password – verification	Mandatory	Fill the field

Change password

LP 2017818

Original password:

Enter your original password The required length is min. 8 characters, min. 1 character from collection [a-z], min. 1 character from collection [A-Z], min. 1 number from collection [0-9], don't use diacritic or any spaces.


New password:

Enter new password The required length is min. 8 characters, min. 1 character from collection [a-z], min. 1 character from collection [A-Z], min. 1 number from collection [0-9], don't use diacritic or any spaces.

New password - verification:

Enter your selected password again.

Figure: User profile / Password change

3) The Logged-in user enters the original password, the new password, the new password – verification, and confirms the selection with .

4) A message will appear:

Figure: Information about successful password change

5) The system will send an email to the user's email box with the subject **Password change successful** confirming a successful password change.

6) User logs in with new password to DAC7 zone by selecting "Login".

4.4 Notification set-up

Notification is a process when an email is delivered to the user's email address, which is listed in the Contact type by email, containing information that the user has received a message in inbox in the DAC7 zone.

Logged-in user can set/cancel email notifications.

The setting of notifications is two-level. The first level presents the group, the second level presents specific notifications. Enabling/disabling sending of notifications is only possible for the second level. The second level can be collapsed below the first level.

Warning type	Allow / Disallow
▼ Submissions	
Rejection of submission	<input type="checkbox"/>
Non-admission of a submission	<input type="checkbox"/>
Error during sending	<input type="checkbox"/>
▼ Official documents and shipments	
Delivery of an official document	<input type="checkbox"/>
Delivery of associated official documents	<input type="checkbox"/>
Receipt of the shipment	<input type="checkbox"/>
▼ Other	
Warning of an unsuccessful attempt to log in to the FA portal	<input type="checkbox"/>


Figure:

User profile/Notification set-up

Note: “Rejection of submission” notification means a document which is created by another FA system and which enters an electronic registry from the internal FA environment and is intended for a specific customer/user.

This is not the *status of submission* made by the user in the Form section but the *report* on the status of submission processing in the electronic registry, generated by internal FA systems.

Setting up/changing notifications:

- 1) The *Logged-in user* selects the tile **User profile/Notification set-up** in the menu.
- 2) The system displays a list of alerts with the option *Enable/Disable*.
The default value for all notifications is "Disable".
- 3) The *Logged-in user* ticks/unticks the selected field and confirms the choice with the key .
- 4) A notification of successful notification change will be displayed:

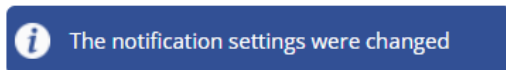


Figure: Information about successful notification change

4.5 Login history

By confirming the "Login history" option, a window will appear with the last 10 entries from the user's login history along with the IP address.

Date and time of the events	Event	IP address
1/12/2023 7:40:15 AM	Successful login	
1/12/2023 7:40:11 AM	Failed login attempt - Incorrect password	
1/12/2023 7:40:03 AM	User logout	
1/12/2023 7:37:34 AM	Successful login	
1/12/2023 7:34:51 AM	User logout	
1/12/2023 7:28:09 AM	Successful login	
1/11/2023 3:54:40 PM	Logout after token expiration	
1/11/2023 2:38:06 PM	Successful login	
1/11/2023 1:54:40 PM	Successful login	
1/11/2023 1:42:18 PM	User logout	

Figure: User profile / Log-in history

5 Communication history

5.1 Sent documents

The function shows a list of all submissions that have been made to the tax administration for the tax entity.

- 1) *The Logged-in user* selects the tile **Communication history/Sent documents** in the menu.
- 2) The system displays a list of DAC7 submissions in the context of which the user is logged in. The list is sorted by date and time in ascending order.
- 3) *The Logged-in user* can set the selection conditions and select the option with

 Search

Item name	Completion obligation	Method of completion
Date from	Optional	Selection from the calendar
Date to	Optional	Selection from the calendar
Registration number	Optional	Fill the field
Submission type	Optional	Selection from the list
Agenda	Optional	Selection from the list
Day	Optional	Selection from the list
Month	Optional	Selection from the list
Quarter	Optional	Selection from the list
Year	Optional	Selection from the list
Interval from	Optional	Selection from the calendar
Interval to	Optional	Selection from the calendar

- 4) The system displays a list that meets the selected criteria.



Evidence number	Document type	Submission date	Processing state	Action
600000344/2023	Všeobecné podanie DAC7 – oznámenie	10.01.2023 10:01	Prijaté a potvrdené	

Figure: Sent documents

- 5) *The Logged-in user* selects to display the submission detail by clicking on the icon .
- 6) The system will display the submission detail.

Submission detail

Subject identifier:

Tax subject:

Registration number of the submission: **600000344/2023**

Submission date: **10.01.2023 10:01**

Submission type: **Všeobecné podanie DAC7 – oznámenie**

Processing state: **Prijaté a potvrdené**

Tax period:

[Back](#)
[View document](#)
[View confirmations](#)
[Create document copy](#)

Figure: Submission detail

- 7) *The Logged-in user* can select the option with [Back](#). Once confirmed, the system shall ensure that it returns to the List of sent documents.
- 8) *The Logged-in user* can select the option with [View document](#). The system opens an electronic document form without editing, in viewing mode.
- 9) *The Logged-in user* can select the option with [View confirmations](#). The system searches for and displays a list of confirmations for that document.
- 10) *The Logged-in user* can select the option with [Create document copy](#). The system opens an electronic form for the document, with the possibility of editing data in the form, and makes available the buttons for working with the form (chapter 6.2).

5.2 Received documents

The function displays a list of deliveries sent to the tax entity from the financial administration by the tax administrator or by financial administration information systems.

- 1) *The Logged-in user* selects the tile **Communication history/Received documents** in the menu.
- 2) The system displays a list of all received documents in the context of the currently selected DAC7 customer.
- 3) *The Logged-in user* can set the selection conditions and select the option with

Search

Item name	Completion obligation	Method of completion
Date from	Optional	Selection from the calendar
Date to	Optional	Selection from the calendar
Registration number of the document	Optional	Fill the field
Document type	Optional	Selection from the list
Agenda	Optional	Selection from the list
Display	Optional	Selection from the list
Day	Optional	Selection from the list
Month	Optional	Selection from the list
Quarter	Optional	Selection from the list
Year	Optional	Selection from the list
Interval from	Optional	Selection from the calendar
Interval to	Optional	Selection from the calendar

- 4) The system displays a list that meets the selected criteria.






Document number	Date of creation	Document type	Type of tax submission	Subject identifier	Action
600000345/2023	10.01.2023 10:01	Informácia o podaní	Všeobecné podanie DAC7 – oznámenie		

Figure: Documents and certificates received

- 5) *The Logged-in user* selects the view of the detail by clicking on the icon  .
- 6) The system will display the document/confirmation detail.

Confirmation detail

Document type:	Všeobecné podanie DAC7 – oznámenie
Tax subject:	
Subject identifier:	
Sender:	
Registration number of the submission:	600000344/2023
Registration number of the confirmation:	600000345/2023
Date and time of ES receipt:	10.01.2023 10:01
Date and time of issuing the confirmation:	10.01.2023 10:01
Tax period:	
Processing state:	Prijaté a potvrdené
Submission status change reason:	

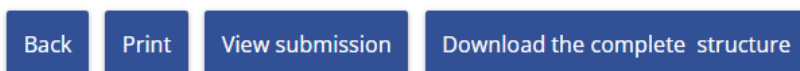


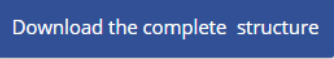
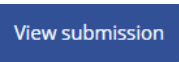


Figure: Confirmation detail


- 7) *The Logged-in user* can select the option with  . Once confirmed, the system ensures return to the List of received documents.
- 8) *The Logged-in user* can select the option with  . Once confirmed, the system ensures printing of information about the open received document.
- 9) *The Logged-in user* can select the option with  . Once confirmed, the system ensures saving/opening of document data in xml format. The file name is <EvidC>.xml, (<Evidid> represents the registration number of

confirmation, the slash in the registration number is replaced by underline, e.g. 600000045_2023.xml).

- 10) The Logged-in user can select the option in the Confirmation detail with . After confirming it, the system displays the submission detail (see Communication history / Sent documents).

5.3 Unsuccessfully sent documents

The function displays a list of shipments that failed to send for various reasons.

- 1) The Logged-in user selects the tile **Communication history/Unsuccessfully sent documents** in the menu.
- 2) The system displays a list of all unsuccessfully sent documents in the context of the currently selected DAC7 customer.
- 3) The Logged-in user can set the selection conditions and select the option with .

Item name	Completion obligation	Method of completion
Save date from	Optional	Selection from the calendar
Save date to	Optional	Selection from the calendar
Document status	Pre-filled value	Default value

- 4) The system displays a list that meets the specified selection criteria.





Document name	Subtype	State	Save date	Reason for failed submission	Action
General filing for DAC7	Žiadosť	Unsuccessfully sent to EKR2	23.11.2022 14:16	Nepodarilo sa odoslať dokument. kod:-10, popis:Typ podania nie je dostupný v DAC7, id2:b51724ee-11b9-074f-e053-ea2518acfe07	 

Figure: Document sent unsuccessfully

- 5) The Logged-in user selects the view of the detail by clicking on the icon . The system displays the document detail.

- 6) *The Logged-in user* selects "Delete" . The system displays a window with a question:

Are you sure you want to delete the selected electronic document?

- 7) "OK" – the system deletes the document,
"Cancel"– the system interrupts the deletion process and closes the question window.

6 Catalogues


6.1 Form catalogue

The form catalogue is a dynamic expansion of the DAC7 module menu with available electronic forms for the DAC7 user registered in the context of DAC7 customer. It allows you to complete, sign and submit the selected electronic form.

- 1) *The DAC7 user* selects the tile **Catalogues/Form catalogue** in the left menu or selects the Form catalogue in the information content of Catalogues.
- 2) The system displays a list of electronic forms in a tree structure by Domain, Agenda, Version of electronic form.

Code	Name	Actions
▼	International exchange of information	
▼	DAC7	
▼	DAC7/DPI Registration Form	
REGDAC7	DAC7/DPI Registration Form	
▼	Tax administration	
▼	Submission for FA - Tax administration	
▼	General filing for DAC7	
VP_DAC7	General filing for DAC7	

Figure: List of form categories



- 3) *The Logged-in user* can enter the selection conditions and confirm the selection with 

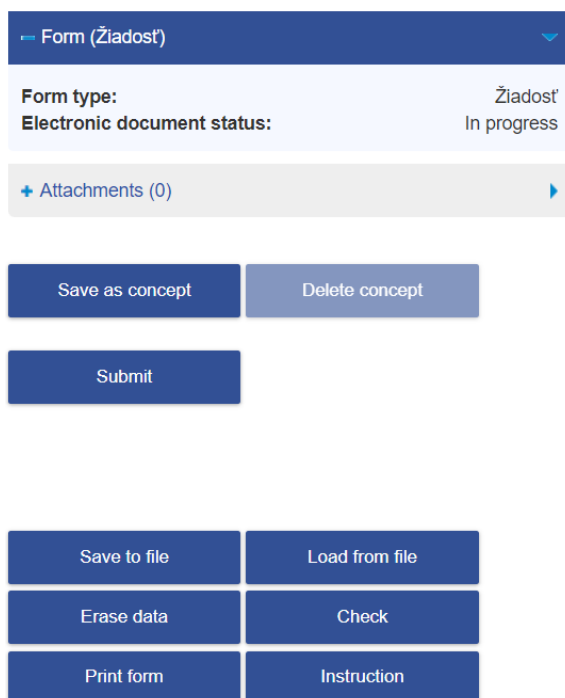
Item name	Completion obligation	Method of completion
Area	Optional	Selection from the list
Agenda	Optional	Selection from the list
Form version name	Optional	Fill the field
Also display the old versions	Optional	By ticking the box

- 4) The system displays a list of forms based on the selection criteria.

6.2 Electronic document submission – working with the form

Completing the form

- 1) *The Logged-in user* selects the form from the drop-down menu that you want to work with by clicking “Complete the form” icon ().
- 2) *The System* displays the selected form and pre-fills selected items of the form with customer data (usually: customer identifiers, customer name, address, tax office, etc.). – this depends on the form).
- 3) *The Logged-in user* fills in the values of the other required fields of the form needed to submit the form. Required fields are marked with an asterisk  .




The screenshot shows a form control panel with the following elements:

- A dropdown menu at the top showing "Form (Žiadosť)" with a downward arrow.
- Form details: "Form type: Žiadosť" and "Electronic document status: In progress".
- An "Attachments (0)" section with a plus sign and a right-pointing arrow.
- Two buttons: "Save as concept" and "Delete concept".
- A "Submit" button.
- A grid of six buttons: "Save to file", "Load from file", "Erase data", "Check", "Print form", and "Instruction".

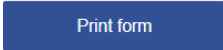
Figure: Form control panel

Form check

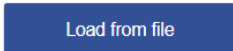
After completing the form fields, *the Logged-in user* verifies the accuracy of the data completed by confirming the selection  .

In case of critical or logical errors, these errors will have coloured red border  , and a list of errors will appear at the bottom of the form with a help for correction.

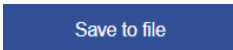
Print the form

- 1) *The Logged-in user* selects the option using the button  .
- 2) *The System* opens a preview of the form that the user can print or save as a file in PDF format.


Loading the form from a file

- 1) *The Logged-in user* selects the option using the button  .
- 2) *The System* asks "Performing this operation deletes the existing data. Do you want to continue?" "Yes/No".
- 3) When "Yes" is confirmed, a dialogue box is displayed to select a file – XML file format must be selected. Confirm the selected file to transfer the data to the form.


Saving the form to a file

- 1) *The Logged-in user* selects the option using the button  .
- 2) A dialogue will appear to select the storage of the form data file in the XML structure.
- 3) *The Logged-in user* enters the name and saves the data.


Erasing data

- 1) *The Logged-in user* selects the option using the button  .
- 2) *The System* asks "Performing this operation deletes the existing data. Do you want to continue?" "Yes / No".
- 3) After "Yes" confirmation, the system will delete the user-filled data. The values of the form fields that are pre-filled are kept.

View instructions for the form

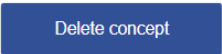
- 1) *The Logged-in user* selects the option using the button  .
- 2) *The system* displays instructions to the appropriate electronic form.
If the instructions are not available for the type of form, the system will display a notification "Instructions not available for this form".

Save the form concept to DAC7

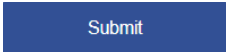
- 1) *The Logged-in user* can save an unfinished or signed form as a concept by selecting the button  .
- 2) The document in progress can be viewed in the section *Concepts/Documents in progress*.

- 3) The saved forms are available to users linked to the same customer.

Deleting the form concept from DAC7

- 1) The Logged-in user selects the option using the button . (The option is only available after you save the form concept to FAP).
- 2) The form is removed from the list of saved forms in the section *Concepts/Documents in progress*.

File a form

- 1) *The Logged-in user* selects the option using the button .
- 2) The form is sent to the electronic registry of the Financial administration.

Checking customer identifiers prior to submission

- 1) *The Logged-in user* submits the form with the "Submit" button.
- 2) If a user submits a form in the context of a customer, the compliance check shall be performed for the customer identifiers from the context of the logged-in user and the identifiers filled-in in the form.
- 3) In case of disagreement, *the user* is notified. The customer identifiers entered in the form must be checked, corrected and resubmitted.

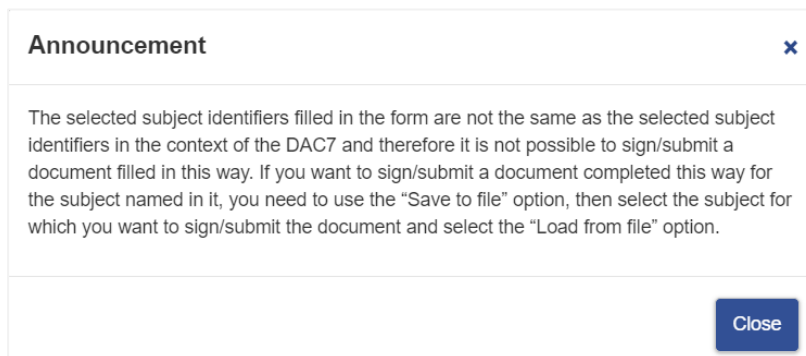


Figure: Notification — notification of non-conformity of data in the form

- 4) In case of compliance, the system will send the form to the electronic registry of the Financial administration.
- 5) If the user is logged in to the DAC7 zone without the customer's context, the form is sent to the electronic registry of the Financial administration without checking.

Add a form attachment

- 1) If attachments can be added for a given type of electronic form, it is in the section

+ Attachments (0) after expansion, click on Administration of attachments . After confirming it, the options for selecting and saving the file will be available in the *Management of Attachments* window.

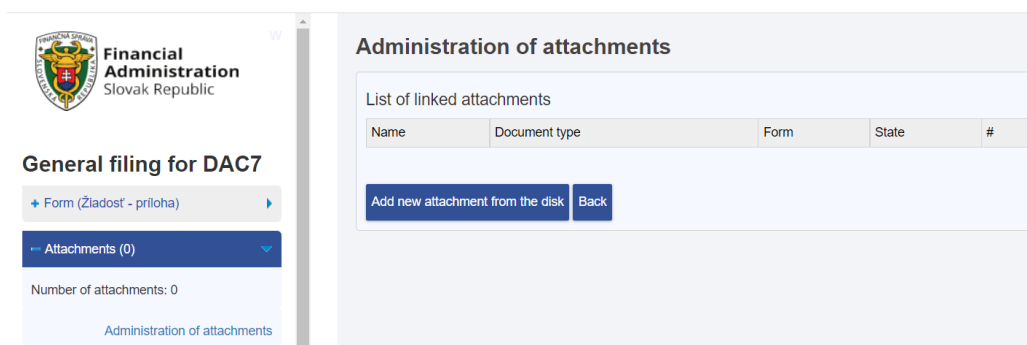


Figure: Administration of Attachments

2) The Logged-in user selects the option with the button Add new attachment from the disk , the following window appears:

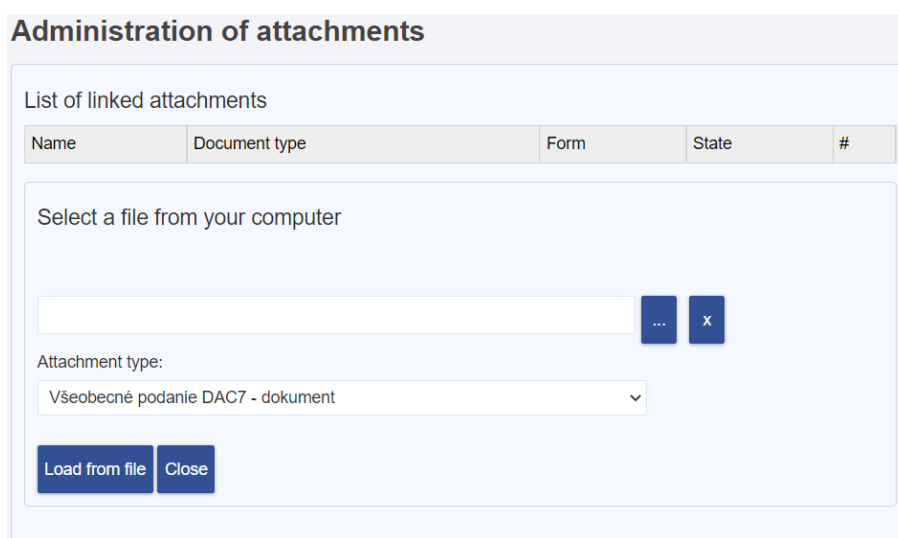
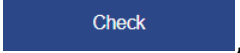
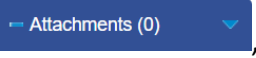


Figure: Administration of Attachments – Loading a file

3) The Logged-in user selects the file and confirms the selection with Load from file . A check of the authorized format of the Attachment is carried out. If successful, the Attachment will be added to the *List of linked attachments*. If the Attachment has an unauthorized format, the user is notified of this fact by a notice listing the allowed suffix. The form can only be submitted with the allowed attachment formats, which may vary depending on the form.

Note: The allowed formats are: ASICE, CSV, DOCX, GIF, GZ, HTML, JPG, ODS, ODT, PDF, PNG, RTF, TAR, TGZ, IF, TXT, XDC, XHTML, XLS, XLSX, ZIP

- 4) If, during the filling of the form, the type of the form is changed to one where it is not possible to enter attachments, after clicking the button , , [Administration of attachments](#) or the link [The form requires the following mandatory documents:](#), the attachment administration is disabled and a notice appears: *It is not possible [Form type] to add attachments to this type of form. To add an attachment, it is necessary to fill in the relevant items of the form correctly and to run a check of its completion, which, if the relevant items are filled in correctly, can make available the functionality for adding attachments.*

7 Concepts

The service provides an overview of the electronic forms in progress. The service shall be accessible to all users logged in in the context of DAC7.

7.1 Documents in progress

The service provides an overview of submissions that are in progress stored in FAP for further use/completion by the same or other users authorized to act as a DAC7 customer.

- 1) *The Logged-in user* selects the tile **Concepts/Documents in progress** in the DAC7 menu.
- 2) The System displays a list of documents in progress. These are documents that the user saved in progress in the Form catalogue by confirming the choice





Document name	Subtype	State	Save date	Action
General filing for DAC7	Žiadosť	In progress	12.01.2023 09:05	 

Figure: Documents in progress

- 3) *The Logged-in user* can change the search criteria and then press to confirm the search



Item name	Completion obligation	Method of completion
Save date from	Optional	Selection from the calendar
Save date to	Optional	Selection from the calendar
Document status	Mandatory	Fixed, preset

- 4) The system displays a list that meets the specified selection criteria.
- 5) *The Logged-in user* selects to display the submission detail by clicking on the icon



6) The Logged-in user can delete a submission from the list by clicking on the icon 

.

8 Inbox


8.1 Messages

The Inbox displays the progress and status of the electronic communication between the customer and the Financial administration.

- 1) *The Logged-in user* selects the tile **Inbox/ Messages** in the menu.
- 2) The System will load a list of messages.

Mark	Priority	Date sent	For subject	Agenda	Message type	Subject of the message	Action
<input type="checkbox"/>	↓	1/2/2023 4:44:04 PM		Submission for FA - Tax administration	Information	Správa o prijatí podania v EP	

Figure: List of messages

- 3) The Logged-in user can change the search criteria and confirm the search by pressing .

Item name	Completion obligation	Method of completion
Message status	Optional	Selection from the list
Agenda	Optional	Selection from the list
Message type	Optional	Selection from the list
Date send from	Optional	Selection from the calendar
Date send to	Optional	Selection from the calendar
View only archived messages	Optional	By ticking the box
View all user messages	Optional	By ticking the box

The **Message status** list contains these values:

- *All* = all messages,
- *Delivered* = all messages of the official document type, the receipt of which was confirmed by the Receive document option,

- *Sent* = all messages not yet received by confirmation of the Receive document option.

The **Agenda** list contains these values:

- *All* = all agendas,
- DAC7.
- Filing for FA – tax administration.

The **Message type** list contains these values:

- *All* = all messages are displayed,
- All official documents = all messages displayed of the type Notification –official document, Decision – official document, Call – official document, Other official document,
- Electronic official document,
- Notification – official document,
- Decision – official document,
- Call – official document,
- Electronic official document,
- Official notification,
- Warning,
- Information.


The checkbox "Show only archived messages" can be:

- *Unchecked* – the user sees all messages for the customer in the context of which he is currently logged in to DAC7,
- *Checked* – the user sees all archived messages for the customer in the context of which he is currently logged in to the DAC7.

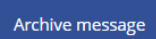

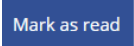
The checkbox "Show all user messages" can be:

- *Unchecked* – the user sees all messages of the customer in the context of which he is currently logged in the DAC7,
- *Checked* – the user sees all messages for all customers for which he has DAC7 links and at the same time user messages that are not linked to any customer.


4) A list is displayed that meets the specified selection criteria.

- Unread and read messages are distinguished by the fonts — read in normal font, unread in bold.
- *The Logged-in user* clicks the icon  to view the details of the selected message. Such a message will be marked as read (normal) for the user who opened it, but for

other users the message will be marked as unread (bold) for as long as it is not opened.

- By confirming the selection , the message is archived, i.e. it will not be automatically deleted from the inbox after the specified number of days set in the configuration (set to 60 days).
- For an archived message, it can be unarchived by confirming the selection , then the message becomes unarchived, so it is automatically deleted from the inbox after a specified number of days (set in configuration) have elapsed from the date the message is delivered to the inbox (set to 60 days).
- *The Logged-in user* marks the selected message that you want to work with by ticking the box .
- The selected message can be marked as read by selecting the option  (*if the message is no longer in the "read" state, otherwise the button is unavailable*). Such a message will be read (normal) for the user who marked it as read. For other users, the message will be marked as unread (bold).

Message detail

- 1) *The Logged-in user* clicks the icon  to view the message detail.
- 2) The System displays the message detail – examples of message types are shown here:

Message detail

Message number:	373959
For subject:	[REDACTED]
Agenda:	Podanie pre FS - Správa daní
Type:	Informácia
Priority:	Nízka
Subject:	Správa o prijatí podania v EP
Date Sent:	1/2/2023 4:44:04 PM
Message content:	<p>Podanie Všeobecné podanie DAC7 – oznámenie s poradovým číslom 600000026/2023 za daňový subjekt [REDACTED] bolo prijaté na spracovanie v elektronickej podateľni.</p> <p>Momentálne prebieha overenie podpisového certifikátu.</p> <p>Prijatie podania si budete môcť overiť po dokončení spracovania, najneskôr do 24 hodín po prijatí tejto správy, v História elektronickkej komunikácie, v Zozname prijatých dokumentov. Odporúčame preto počkať na výsledky kontroly spracovania podania.</p>
Archiving state:	Nearchivovaná ⓘ

[Back](#) [Print](#) [Archive message](#) [Display confirmation](#)

Figure: Details of the Information-type message

9 DAC7 connections

9.1 My DAC7 connections to customers

The service displays a list of DAC7 customers linked to *the Logged-in user*.

- 1) **The Logged-in user** selects DAC7 connections/My DAC7 connections to customers in the menu.

N.B.: The option is only available if the user is logged in in the context of DAC7 customer.

- 2) The System displays a list of all existing DAC7 connections for the Logged-in user. These are all DAC7 customers for which the Logged-in user can act under the DAC7 special arrangements.

My DAC7 connections to subjects


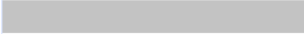
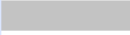



Tax ID	Name and place	Validity from
	 Česko, Brno, Nová 123/1	12/20/2022
	 Spojené královstvo, TAVISTOCK SQUARE LONDON, BMA HOUSE 1	1/3/2023
	 Zvolen, Balkán 1779/43	12/20/2022
	 Bratislava - m. č. Podunajské Biskupice, Šamorínska 10	1/10/2023

Figure: List of DAC7 connections of the Logged-in user

Note: TIN value is displayed only for those customers that have it or have had assigned it in the past.


10 Customer file

The *Customer file* category contains the documents generated in the communication between the customer and the Financial administration.

- 1) *The Logged-in user* selects the tile **Customer file/File content** in the DAC7 menu.



Figure: The tile of the Customer file

- 2) The System displays the "List of file documents" screen.
- 3) *The Logged-in user* sets the selection conditions and selects the option with .

Item name	Completion obligation	Method of completion
Domain:	Optional	Selection from the list
Agenda:	Optional	Selection from the list
Date from:	Optional	Selection from the calendar
Date to:	Optional	Selection from the calendar
Type of tax entity:	Optional	Default value
Direction of communication:	Optional	Selection from the list
Registration number from:	Optional	Fill the field
Registration number to:	Optional	Fill the field

- 4) The system displays a list of file documents that meets the specified selection criteria. The list shall be sorted in ascending order by the registration number.






Evidence number	Date of admission/delivery	Type / Name of the document	Direction of communication	Action
690000037/2023	1/3/2023 8:37:46 AM	General entry document	Sent to FA	
690007444/2022	12/21/2022 11:26:52 AM	General entry document	Sent to FA	
690007442/2022	12/21/2022 11:26:03 AM	General entry document	Sent to FA	

Figure: List of file documents

- 5) *The Logged-in user* can print the list of file documents by selecting  .
- 6) Once confirmed, the system shall ensure that the complete list of file documents is printed.
- 7) *The Logged-in user* selects to display the document detail by clicking on the icon  in any line in the list.
- 8) The system displays the desired file document in the "**Document detail – sent to FA**" or "**Document detail – Received from FA**" screen. The functionality and appearance of the document detail screen is identical for both document details, i.e. both for the document sent to FA and received from FA.

Document detail - Sent to FA

Všeobecné podanie DAC7 - oznámenie
Evidenčné číslo: 690000037/2023

Všeobecné podanie pre Finančnú správu Slovenskej republiky - DAC7
(General filing for DAC7)

Adresa podania (Address)

Orgán finančnej správy (Financial administration body): Daňový úrad (Tax office)

Daňový úrad (Tax office): Bratislava

Oblasť podania (Filing Area): Registre (Registers)

Typ podania (Type of filing): Oznámenie (Notification)

Identifikačné údaje daňového subjektu (Identification)

Fyzická osoba (Natural person)

Právnická osoba (Legal person)

Individuálne identifikačné číslo pre DAC7 (DAC7 Individual Identification Number):

Právnická osoba (Legal person)

Obchodné meno / názov (Business name / Company name):

Adresa trvalého pobytu / Adresa sídla

Ulica (Street): Slovenská Súpisové/katastrálne číslo (Property registration number/Building number): 8501 / 1

PSČ (Post Code): 82107 Mesto (City/Town): Bratislava - mestská časť V

Štát (Country): Slovensko (Slovakia)

Súčasťou podania nie je príloha (The submission does not include an attachment)

Podanie je tvorené súborom dokumentov (The submission consists of a set of documents)

Súčasťou podania je príloha (The submission includes an attachment)

Obsah podania (Content)

Text podania (Description):

Text

Dátum podania (Date): 12.01.2023

Print document Open document

Document information

Evidenčné číslo: 690000037/2023

Type / Name of the document: Všeobecné podanie DAC7 - oznámenie

Domain: Registration

Direction of communication: Sent to FA

Method of admission: PFS

Person who submitted: Lucia Tester

Back Document information Save entire document structure

Figure: Section "Document detail - Sent to FA" (structured data section)

Screen "Document detail screen– sent to FA" or "Document detail – Received from FA" is displayed on the screen without the left menu, i.e. in full width 1018 px.

The screen is divided into sections:

- "Document detail" section,
- "Document information" section,
- "Document attachments" section,
- "Related documents" section,

- “Dedicated keys” section.

The “Document detail” section primarily offers the user insight into the document (its visualization). The section can be divided into a section for structured data and a section for unstructured data.

The section for structured data of document detail is dynamically depicted, i.e. if not existing it is hidden. If displayed, the following elements will be displayed:

Name	GUI element	Mandatory	Description
Document type/name	string	yes	Attribute value without description
Registration number	string	yes	Attribute value
Visualized document	Structured data	no	Display of e-document as an e-form

and buttons:

Name	Accessible	Description
Print document	Accessible if the document can be visualized (in the case of a defined authority of a customer file — creation of outputs)	Print a visualized document
Open the document	yes	Button to open or save an XML to the main document. The document is stored in the user's device.

Section “**Document information**” is intended to show the meta data of the file. For each optional section attribute, if their value is not filled, the attribute name will not be displayed either. The section elements are as follows:

Name	GUI element	Mandatory
Registration number	string	yes
Document type/name	string	yes
Domain	string	no
Agenda	string	no
Type of tax entity	string	no
Direction of communication	string	yes
Method of delivery	string	no
Method of admission	string	no
Date of admission	Date and time	no
Submission date	Date and time	no
Date of sending	Date and time	no
Date of delivery	Date and time	no
Person who submitted	string	no
Tax period	string	no
File No.	string	no
Attachments	string	no

Document information


Evidence number:	690000037/2023
Type / Name of the document:	Všeobecné podanie DAC7 - oznámenie
Domain:	Registration
Direction of communication:	Sent to FA
Method of admission:	PFS
Person who submitted:	

Figure: “Document information” section

“Document attachments” section shows the data on the list of attachments of the displayed file. The section is dynamically visible, i.e. in the absence of document attachments, the section is hidden. The section is structured as follows:

Name	GUI element	Mandatory
Serial number	integer	yes
File format	string	yes

and button:

Name	Accessible	Description
Show attachment	yes	Depending on the file type, it allows the contents of the file document to be displayed or stored. The Show button is not a physical button with a label; it is visually represented by the "magnifier" icon after each item in the list of attachments to the file document.

Document attachments


Serial number	File form	Aktivita
1	docx	

Figure: "Document attachments" section

"Dedicated keys" section is the key section for working with the displayed document. The buttons are fixed at the bottom of the website so that they are still available. The section name itself will not appear on the page. The section consists of the following buttons:

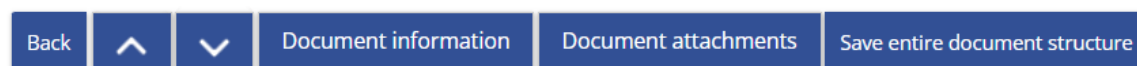


Figure: "Dedicated keys" section

Name	Accessible	Description
Scroll up	Accessible if scrolling up is possible	Scroll up or return to the main document represented by the " ▲" key. If the document displayed contains more than one main document, it is set to the previous document or to the previous section or to the beginning of the document detail. If there is only one main document, click to set it to the beginning of the document detail, or to the previous section.

Scroll down	Accessible when scrolling down is possible	Scroll down represented by the "▼" key. If the document displayed contains more than one main document, after clicking it will be set to the next section in the document.
Document information	Yes	Move to Document information section. When clicked, the view moves to the section of the document information screen below the document detail.
Document attachments	Accessible if the document has attachments to the document	Move to Document attachments section. When clicked, the view moves to a section of the screen from the lists of attachments available for the main document below the document information.
Related documents	Accessible if the document has related documents	Move to Related documents section. When clicked, the view moves to the section of the screen with a list of related documents located below the document attachments.
Save the entire document structure	Accessible if the entire document structure is available	Save the entire document structure. When clicked, the entire message container is saved, if available.

11 Authorized services

11.1 Return to PIZ

If the PIZ user is logged in to the DAC7 zone, a “Return to PIZ reference is available in the Authorized services tile to ensure that the user returns to PIZ.

