

**Bureau of Internal Revenue**



**Job Aids  
for Taxpayers and  
Accredited Tax Agents  
for the  
Use of the eBIRForms**



Contact Center: (02)981-8888  
BIR Website: [www.bir.gov.ph](http://www.bir.gov.ph)



## **TABLE OF CONTENTS**

1. Project Overview .....	2
2. Definition of Terms and Acronyms .....	3
3. Features of eBIRForms.....	4
4. Introduction to the eBIRForms .....	5
5. How to Use the Offline eBIRForms Package.....	9
5.1. How to Download and Install the eBIRForms Package .....	9
5.2. How to Update the Offline eBIRForms Version .....	21
5.3. How to Navigate Through the Form .....	23
5.4. Types of Input .....	23
5.5. How to Use the eBIRForms Package Offline .....	24
5.6. How to Print and Sign the Form .....	43
6. How to Use the Online eBIRForms System.....	49
6.1. Enrollment .....	49
6.2. Filing .....	75
7. Frequently Asked Questions (FAQs) .....	96



## 1. Project Overview

### 1.1. Project Background

In support of the Bureau's goals of achieving electronic filing of all taxpayers to capture tax returns data, improving efficiency and providing accurate statistical reports, the Indra and Philcox Joint Venture (JV) is implementing the Solution for the Use of Interactive Forms (IAF) for Filing Tax Returns.

BIR's directions are to:

- Improve filing efficiency
- Increase channels to taxpayers
- Maximize the use of new technologies
- Capture data from third party solutions
- Capture more returns data online and offline
- Increase tax return data capture
- Improve accuracy in statistical reporting
- Reach even those with limited internet capability

Through the project, the Bureau of Internal Revenue (BIR) hopes to gain the following benefits:

- Reach a wider range of taxpayers through additional filing channels that complement the BIR Electronic Filing and Payment System (eFPS)
- Increase rate of proper, voluntary tax return filing through convenient filing methods
- Motivate taxpayers to use electronic channels to improve data capture of tax return data
- Pioneer assimilation of data from third party applications
- Build public trust and improve relationship between private sector and the BIR

The project is divided into three (3) phases:

Phase 1 – Delivery of BIR Forms 1700, 1701, 1702 which can be downloaded from the BIR portal in PDF format. Taxpayers and/or ATAs can input/edit data in the PDF form. They can save/print the form and submit it to BIR offices manually.

Phase 2 – Delivery of the software package containing the thirty-one (31) BIR Forms that can be used offline when preparing tax returns. Taxpayers and/or tax agents/practitioners can input/edit data in the form. They can save/print the form and submit it to BIR offices manually.

Phase 3 – Delivery of the filing infrastructure/online system that will accept, validate, process and store the accomplished tax returns submitted online. This will provide BIR with the ability to monitor and initially process the forms uploaded by the taxpayers using the offline forms developed in phase 2. Data uploaded to the online system will also be sent to the existing Systems of BIR such as ITS and RPS for returns processing. The system will cater to the needs of taxpayers (non-eFPS filers), authorized tax agents (ATAs), and Tax Software Providers (TSPs). Tax agents/practitioners will be allowed to file on behalf of their clients. The System will also have a facility for TSPs to test and certify the outputs of their tax preparation software. It will also be capable of accepting returns data filed using system-certified TSP tax preparation software.



## 1.2. What is the eBIRForms Project?

The eBIRForms project aims to develop a filing infrastructure to provide electronic submission channels to all taxpayers (non-eFPS users) that are accessible and convenient. It will make tax preparation easier through automatic computations and validation features, lessening human error.

The eBIRForms aims to increase the electronic capture of data, lessening manual encoding for BIR, and increasing accuracy in statistical reporting.

## 2. Definition of Terms and Acronyms

### 2.1. Definition of Terms

Term	Definition
<b>Offline</b>	Activity is accomplished while individual is not connected to the internet
<b>Online</b>	Activity is accomplished while individual is connected to the internet
<b>Manual filing</b>	Taxpayer fills up form offline, prints it and submits form to AAB, RDO/ RCO
<b>Electronic filing (in reference to the use of the eBIRForms)</b>	Taxpayer fills up form using: <ul style="list-style-type: none"> <li>• eBIRForms package (offline)</li> <li>• Downloadable Excel or PDF eBIRForms (1700, 1701, 1702)</li> </ul>
<b>Manual payment</b>	Taxpayer or ATA physically hands over payment to AAB or RCO
<b>Electronic payment</b>	Taxpayer or ATA enrolls in a payment system, and directly uses the system for payment online

### 2.2. Acronyms

Term	Definition
<b>AAB</b>	Accredited Agent Bank
<b>ATM</b>	Automated Teller Machine
<b>eBIRForms</b>	Electronic Bureau of Internal Revenue Forms
<b>eFPS</b>	Electronic Filing and Payment System
<b>ESM</b>	Efficient Service Machine
<b>OTC</b>	Over-the-Counter
<b>PDF</b>	Portable Document Format
<b>RCO</b>	Revenue Collection Officer
<b>RDO</b>	Revenue District Office



### **3. Features of eBIRForms**

#### **3.1. What is the Offline eBIRForms Package?**

- Refers to the version of the BIR forms developed and maintained by the BIR for offline preparation of tax returns that allows taxpayers to insert data edit, save, and print. It responds to the inputs of the user and it has automatic computation and validation features.

#### **3.2. What is the Online eBIRForms System?**

- Refers to the filing infrastructure that accepts, validates, processes and stores tax returns submitted online. The System creates secure user accounts for taxpayers, ATAs and Tax Software Providers (TSPs) for use of the Online System and allows ATAs to file in behalf of their clients. The System also has a facility for TSPs to test and certify the outputs of their tax preparation software. It will also be capable of accepting returns data filed using system-certified TSP tax preparation software.

#### **3.3. What are the Features and Functionalities of the eBIRForms?**

**COMPLIANCE.** The eBIRForms will prompt the user for invalid inputs and for lack of information. Validation features check if the TP conforms to business rules:

- Only one option should be selected
- Date input should be in the MMDDYYYY format
- Text field only accepts certain declared values
- Input should have a specific data length
- Required fields are filled up

**CONSISTENCY.** The eBIRForms have automatically generated fields with computations based on the existing BIR forms.

**CONVENIENCE.** Because of the auto-populated fields in the eBIRForms, the taxpayer needs to fill up fewer fields making tax filing easier and faster.

#### **3.4. What are the Benefits of using the eBIRForms?**

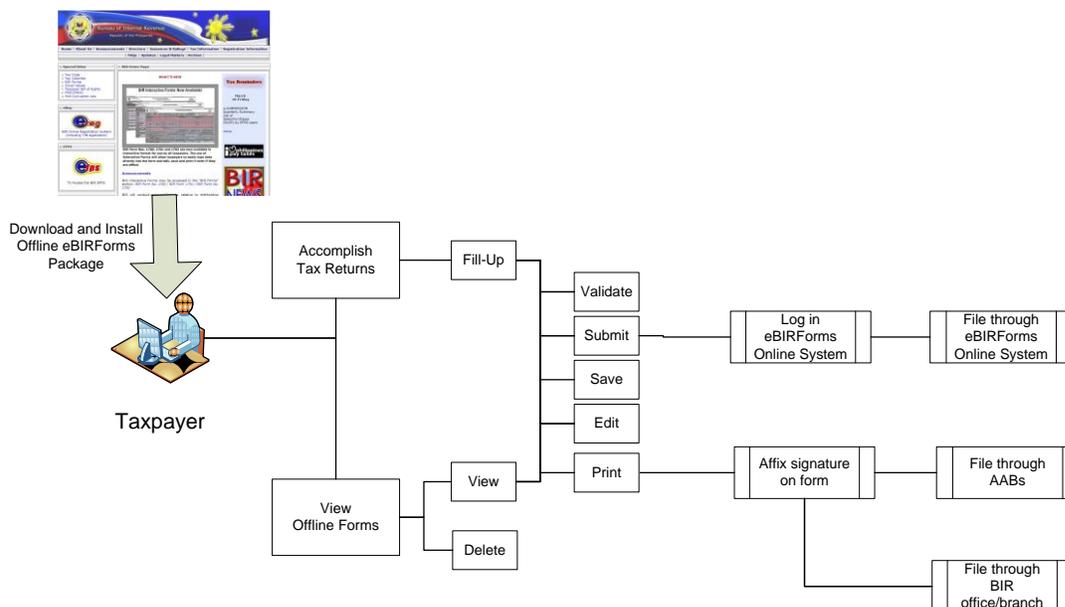
- Saves time because of automatic computations and auto-populated fields
- Easy to use
- Lessens human errors because of the validation feature
- Available even to those without consistent internet connection
- Captures taxpayer data
- Lessens manual encoding

**Note: The BIR Forms in the Offline eBIRForms Package are not new forms. They are the existing BIR Forms in electronic format.**



## 4. Introduction to the eBIRForms

### 4.1. System Overview



#### System Requirements:

- Supported Operating System: Windows 2000/XP/Vista/7;
- Pentium IV processor or higher;
- Hard disk drive space needed: at least 50 MB free space;
- RAM memory needed: Runs best on 2GB or higher ActiveX components via Internet Explorer version 8 or higher;
- At least 1Mbps internet connection;
- Java Run-time Environment version 1.7; and
- eBIRForms Package is best viewed in 1152 x 864 screen resolution.

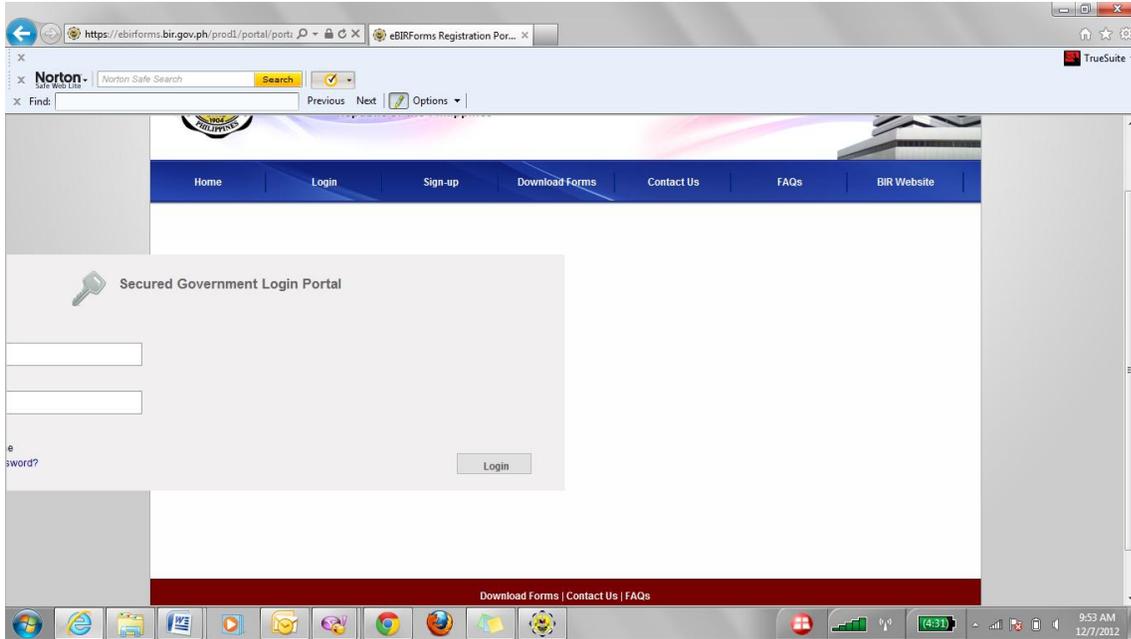
#### Browser Requirements:

- Internet Explorer v9 or up for windows 7 with Active X
- Mozilla Firefox v16 or up
- Google Chrome v23 or up

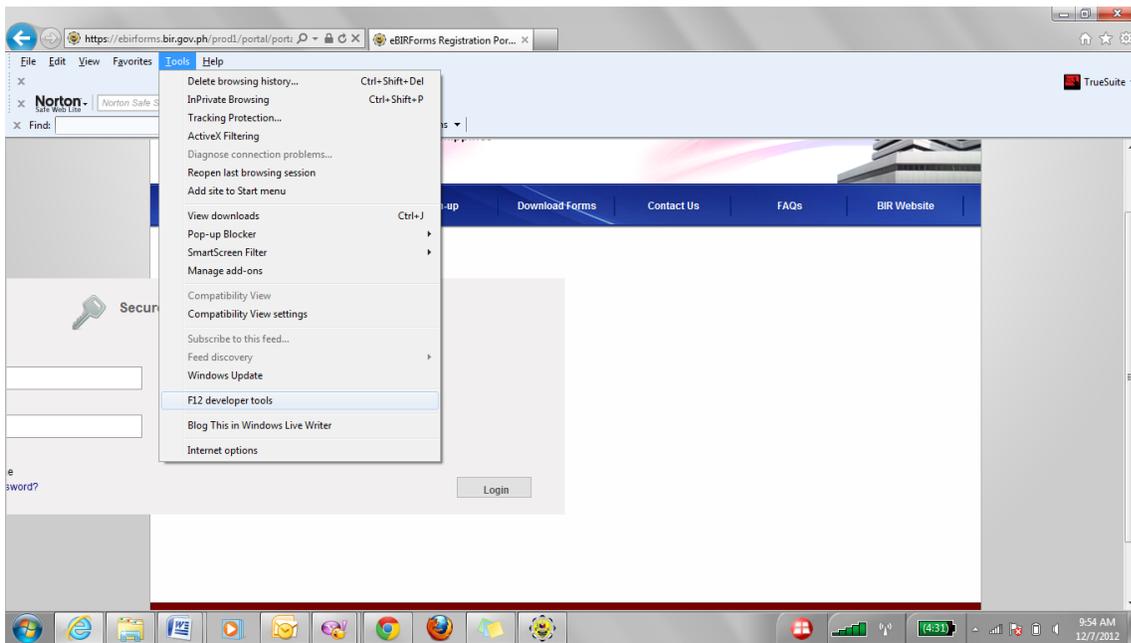


**How to Check Compatibility View Settings:**

1. Before using the Online eBIRForms System, make sure that your version of IE9 has the correct compatibility view settings. You will need to adjust your IE9 compatibility view settings if your eBIRForms system log-in screen looks like this:

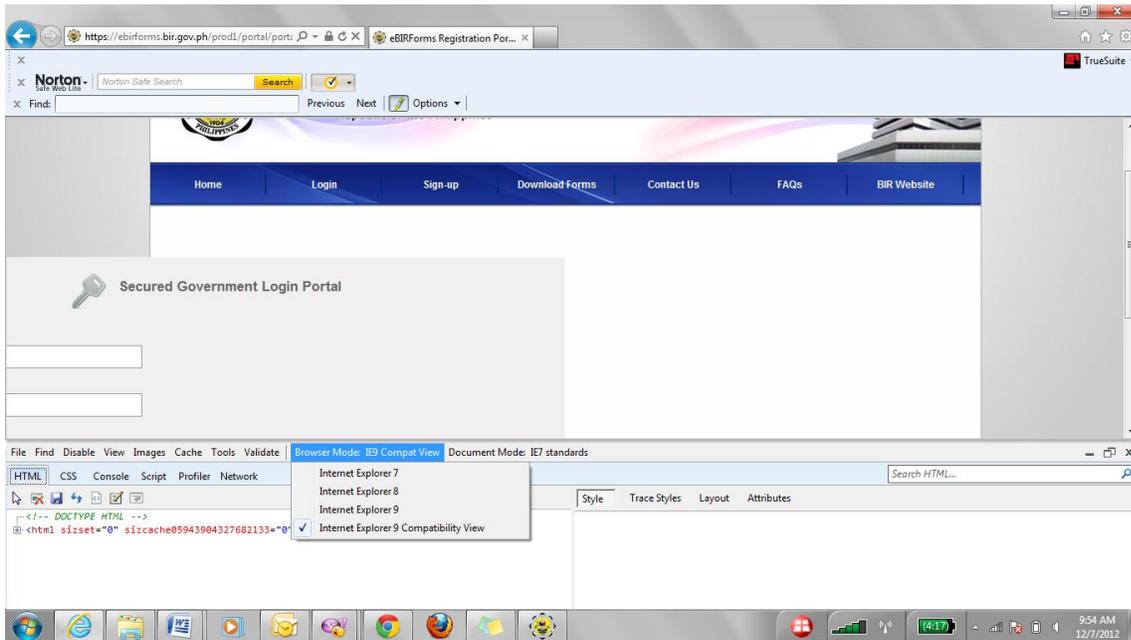


2. To fix the view, go to Tools and click on F12 developer tools.

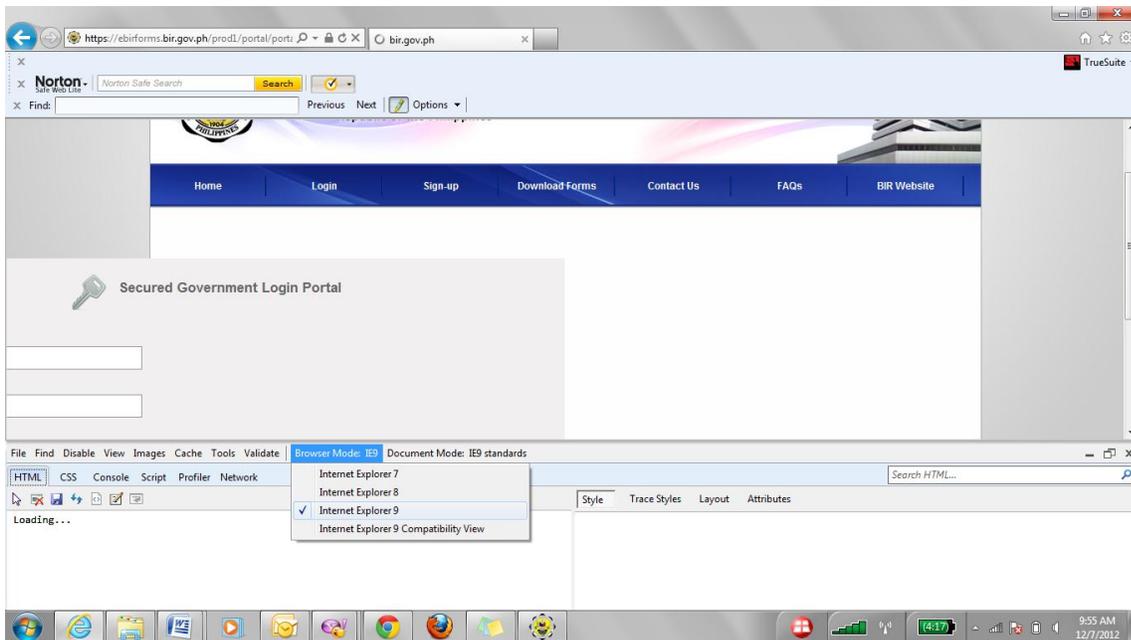




3. In the F12 developer window, click on Browser Mode IE9 Compatibility View.



4. Set the Browser Mode to Internet Explorer 9.

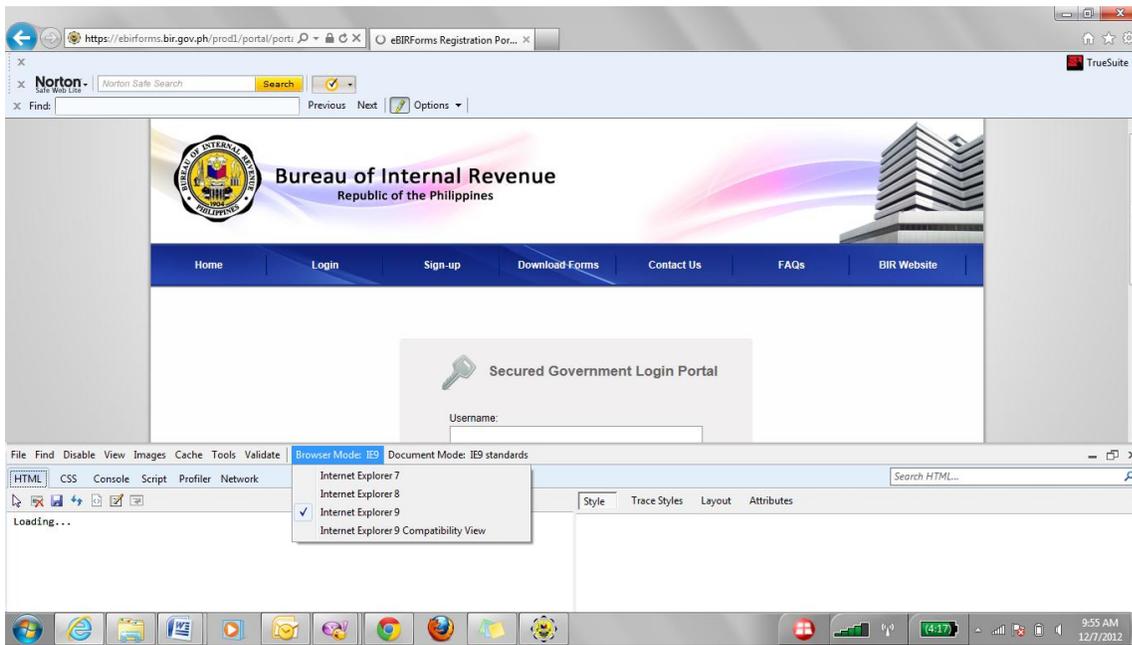


# GUIDE FOR eBIRFORMS

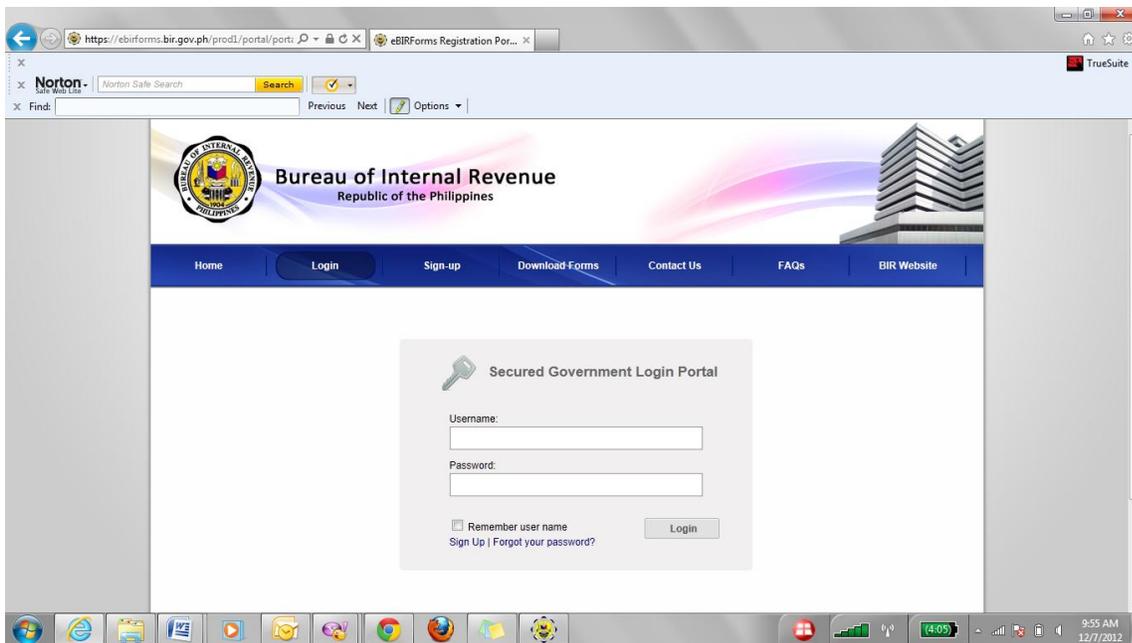
## Job Aid for Taxpayers and Accredited Tax Agents



5. Upon setting the browser mode to Internet Explorer 9, the eBIRForms log-in page should automatically reload.



6. Click on File > Exit. Refresh the page.





## 5. How to Use the Offline eBIRForms Package

### 5.1. How to Download and Install the eBIRForms Package

Note: Screenshots are from Windows XP. The look of the screens may differ depending on the version of Windows that you are using.

#### 5.1.1. If you have internet access

1. Go to the BIR website at <http://www.bir.gov.ph>. Click on the eBIRForms icon/link on the left-hand side of the website to download the package.



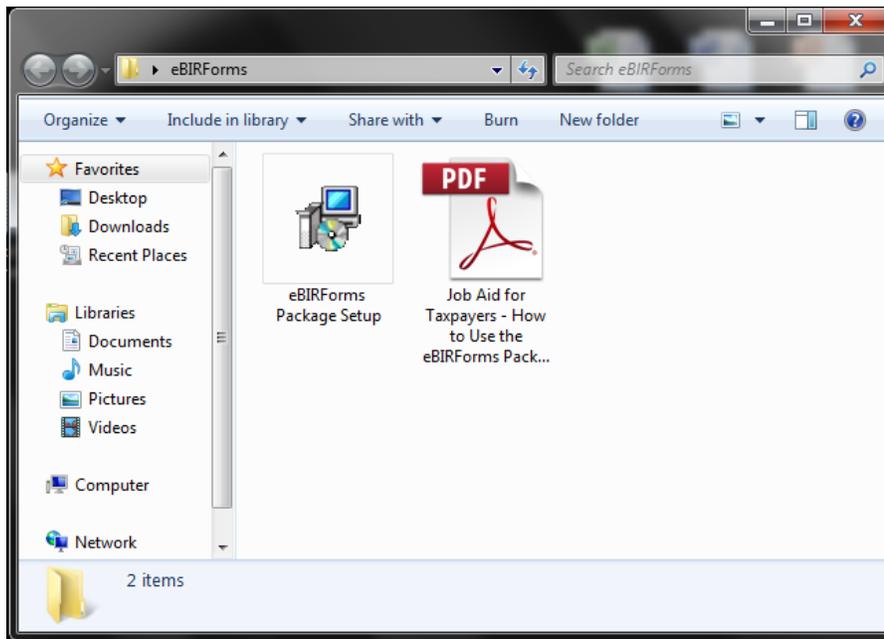
2. Download the zipped file. This will contain the following files:
  - a. eBIRForms Package installer (eBIRForms Package Setup.exe)
  - b. Job Aid with:
    - Computer/system requirements
    - How to Use the eBIRForms Package
    - FAQs (Frequently Asked Questions)



eBIRForms



3. Unzip the contents of the zipped file.



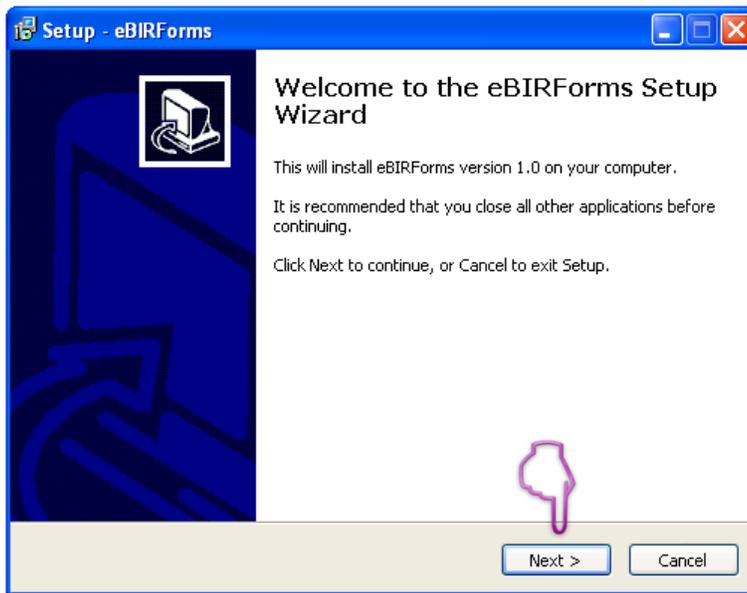
4. Click on the eBIRForms Package Setup.exe icon to start setup of the eBIRForms Package.



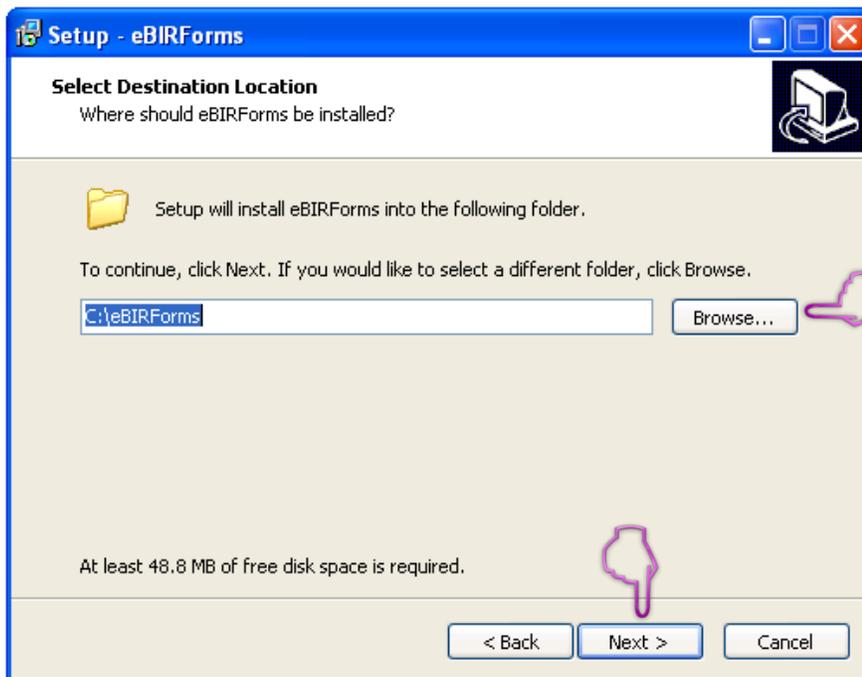
5. Click 'Yes' in the User Account Control window that appears after clicking on the eBIRForms Package setup.exe icon (applicable to operating system version higher than Windows XP).



6. Click 'Next.'



7. Click 'Browse' to select the location folder for the eBIRForms Package (default is drive C). Then click 'Next.'

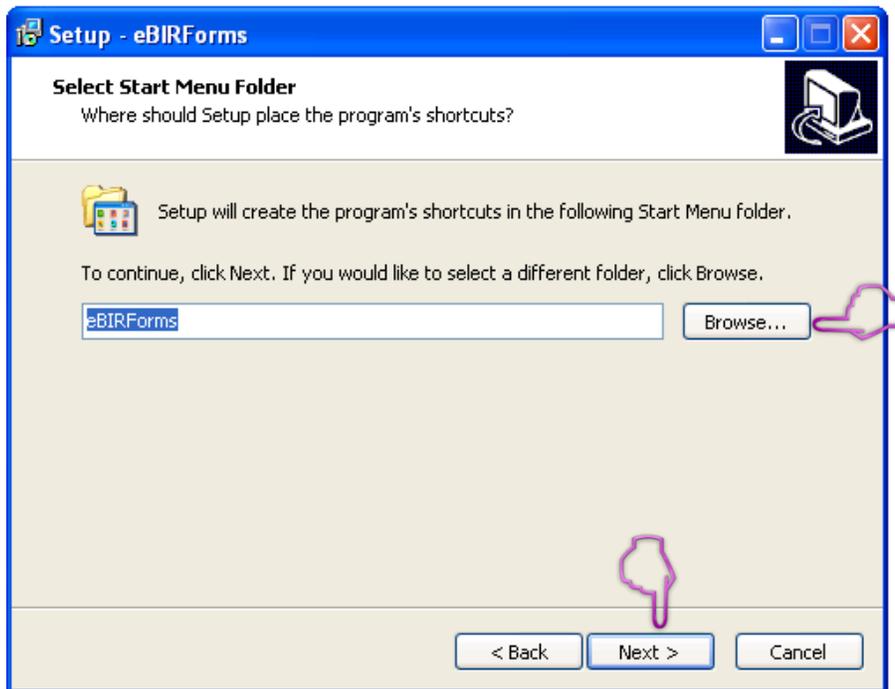


## GUIDE FOR eBIRFORMS

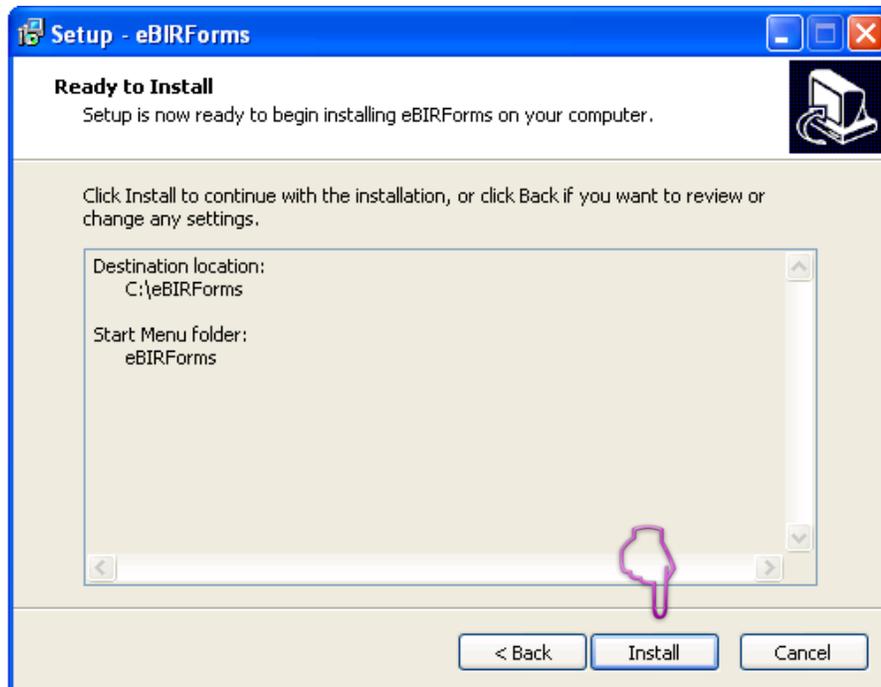
Job Aid for Taxpayers and Accredited Tax Agents



- Click 'Browse' to select the location of the eBIRForms Package shortcut (default is Start Menu folder). Then click 'Next.'

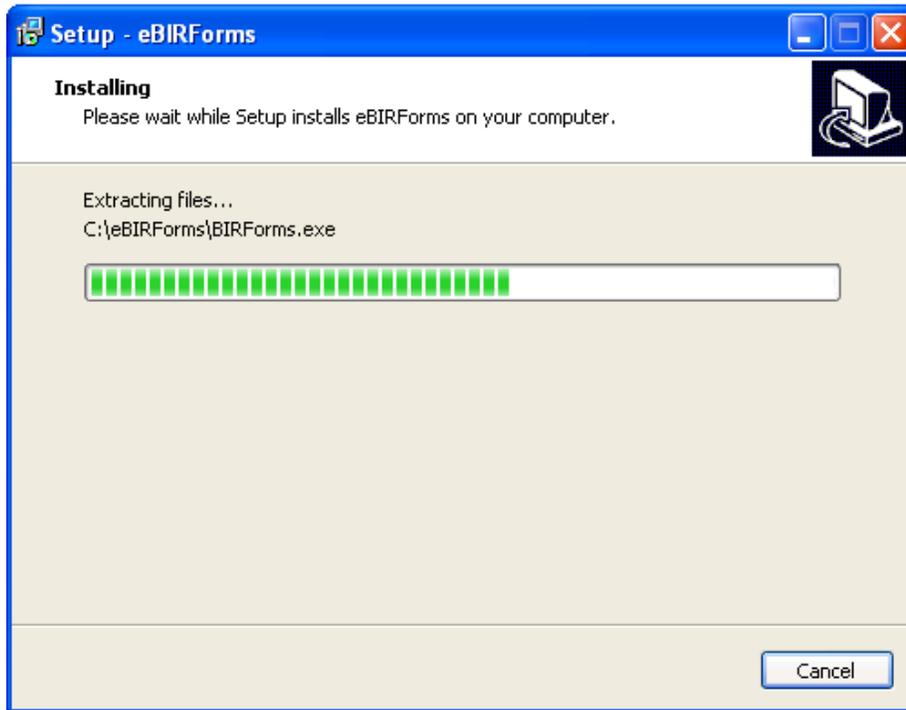


- Click 'Install.'

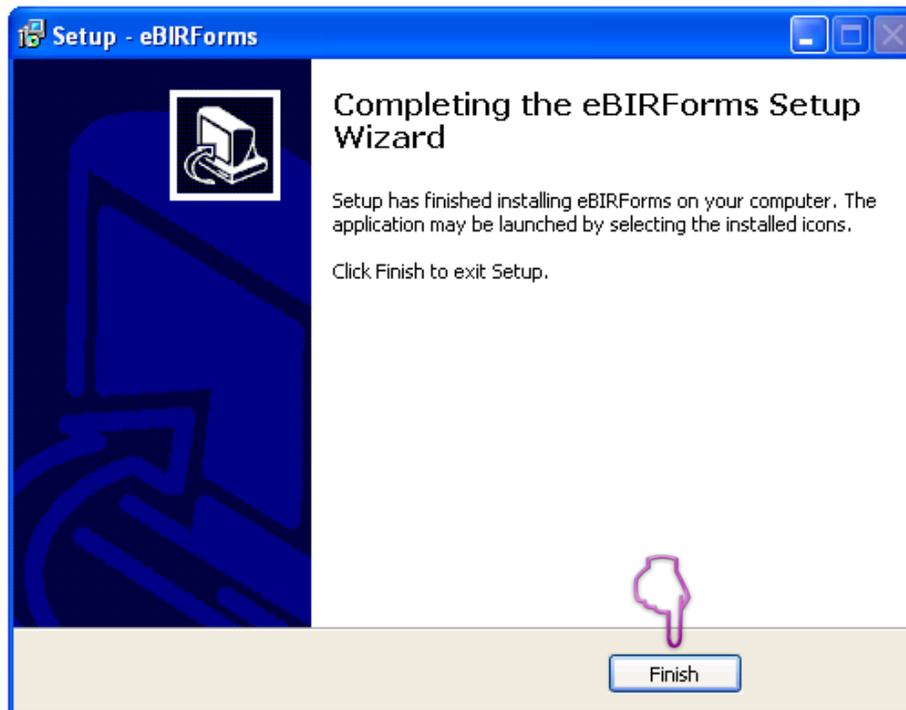




10. The following dialog box is displayed after clicking the 'Install' button.

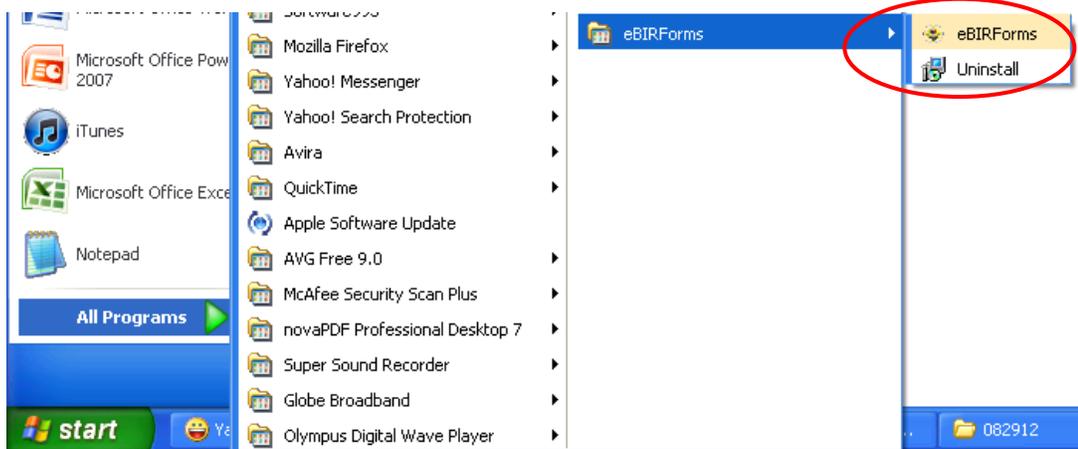


11. Click 'Finish' to complete the installation.





12. After successful installation, notice that the 'eBIRForms' as well as the 'Uninstall' icons are now displayed in Windows Start Menu (assuming that this is the location you chose for the program shortcut).



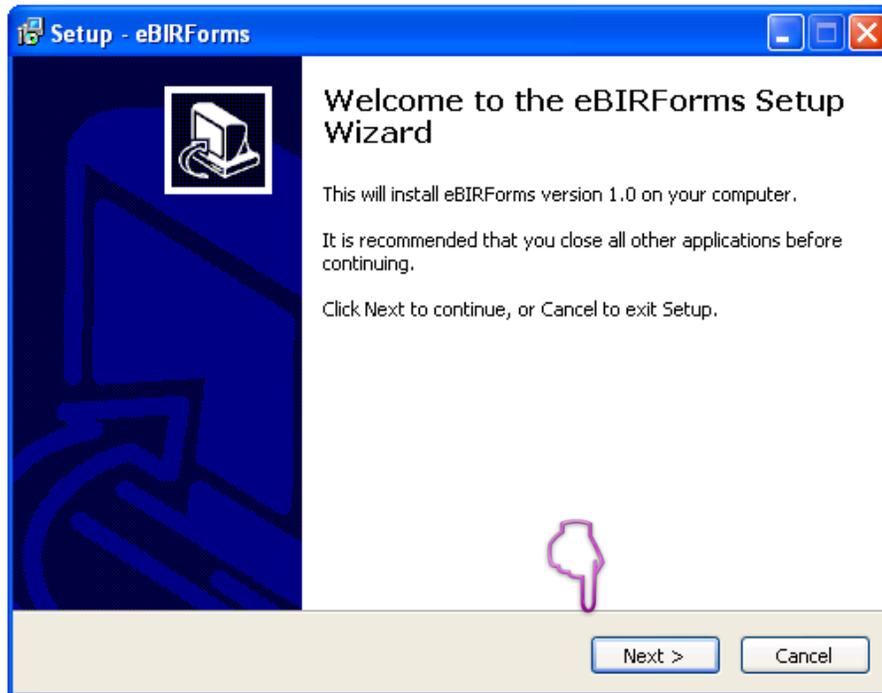


### 5.1.2. If you do not have internet access

1. Go to a BIR e-lounge and bring a USB flash drive.
2. Insert your USB flash drive into e-lounge computer. Look for the eBIRForms Package setup.exe file and double-click it.



3. A message window will appear. Click 'Next.'

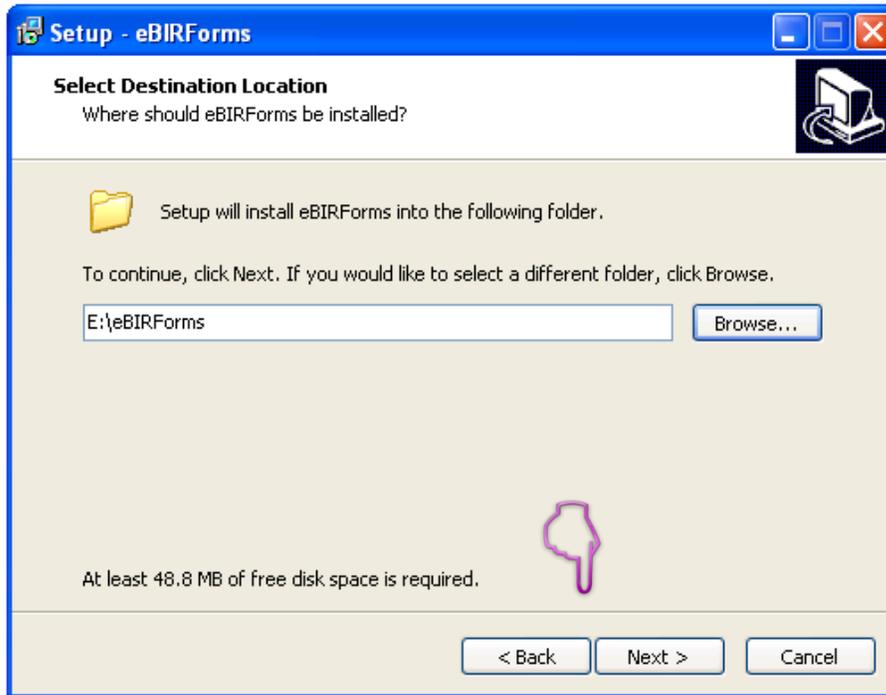


# GUIDE FOR eBIRFORMS

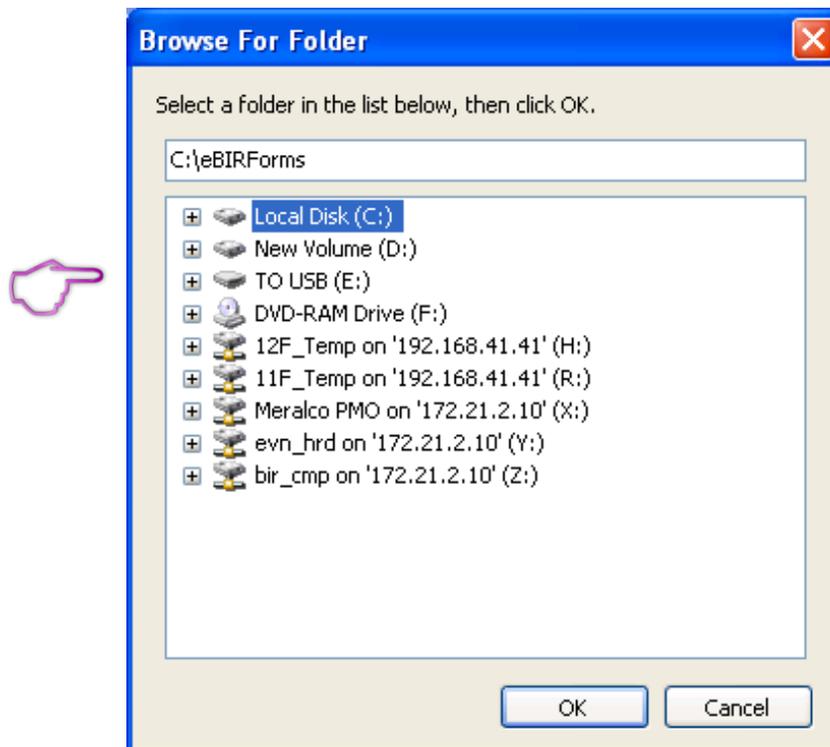
Job Aid for Taxpayers and Accredited Tax Agents



- Click on 'Browse' to look for the drive location of your USB flash drive (default is drive C).

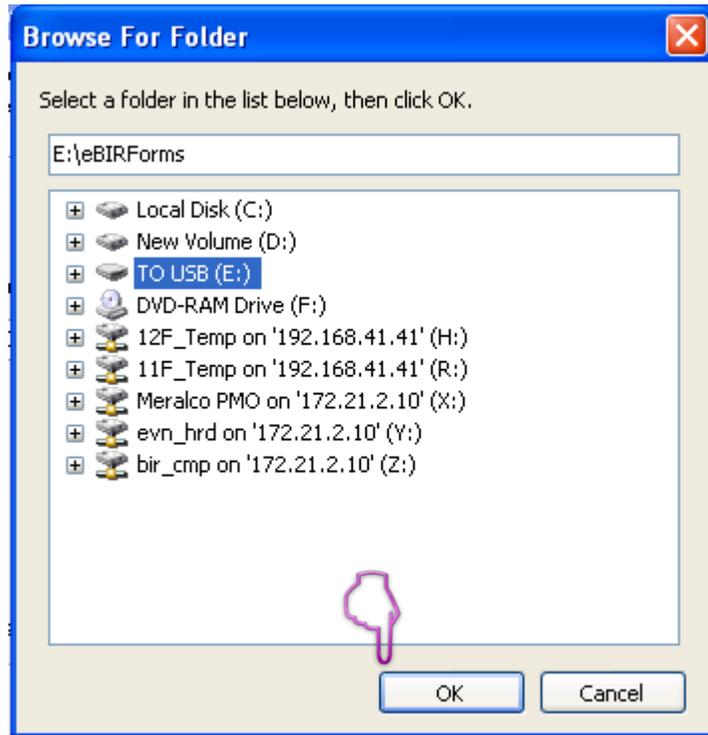


- Select the USB folder or drive from the list displayed.

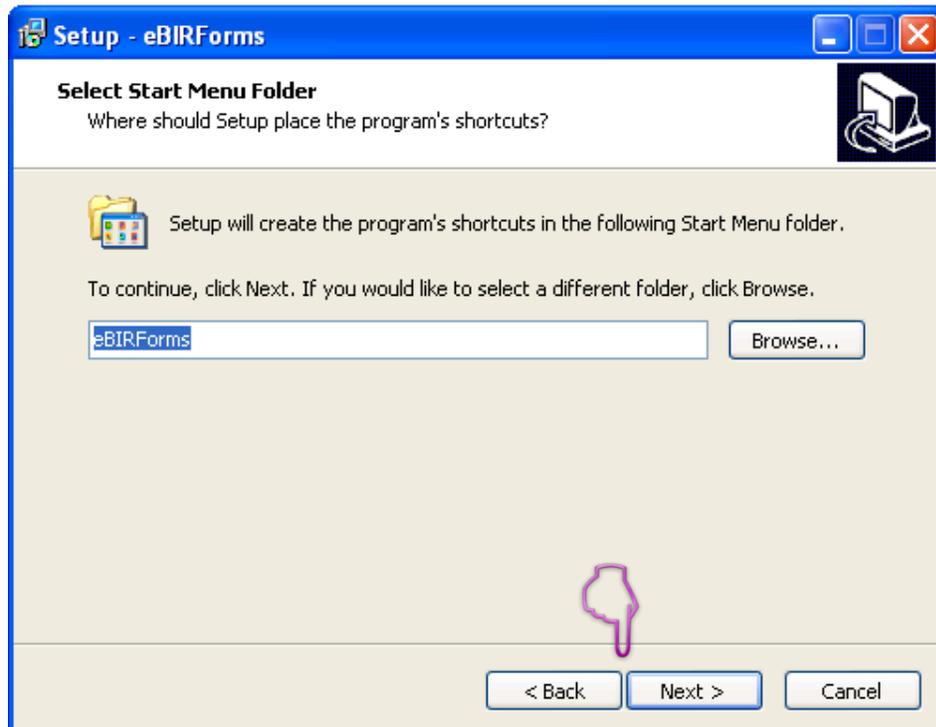




6. After selecting the USB drive, click 'OK.'

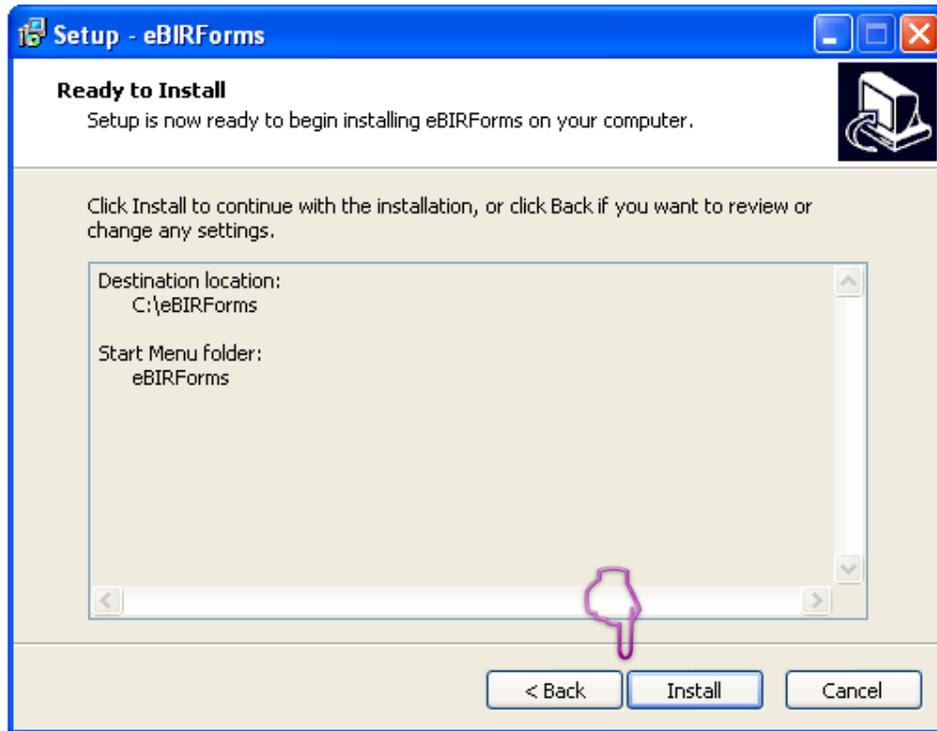


7. Click 'Browse' to select the location of the eBIRForms Package shortcut (default is Start Menu folder). Then click 'Next.'

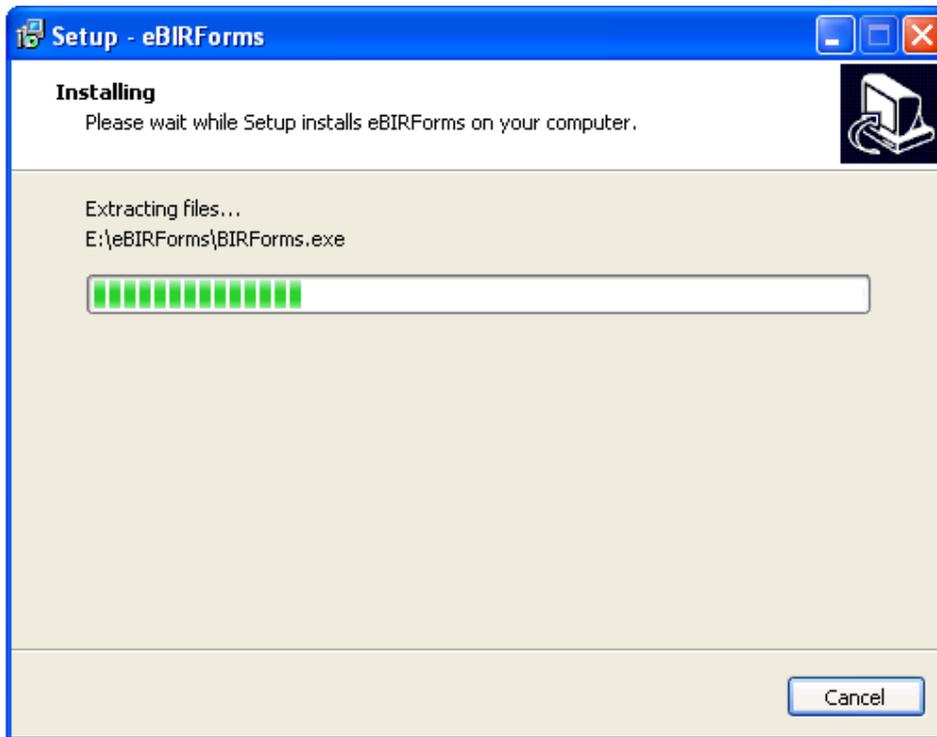




8. Click 'Install.'

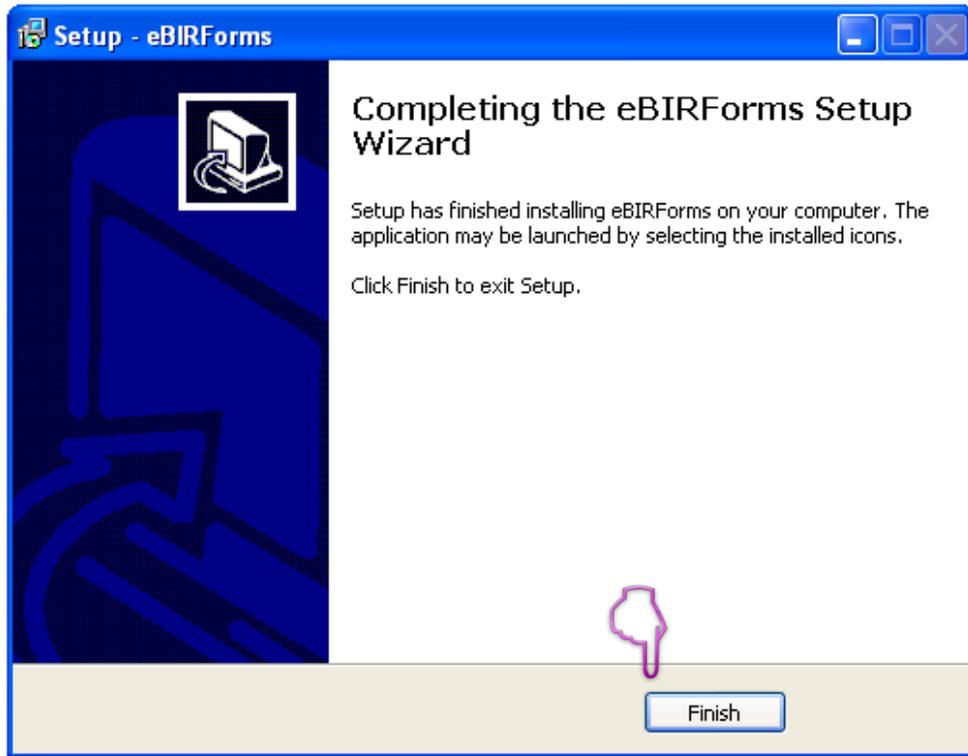


9. The following dialog box is displayed after clicking the 'Install' button.

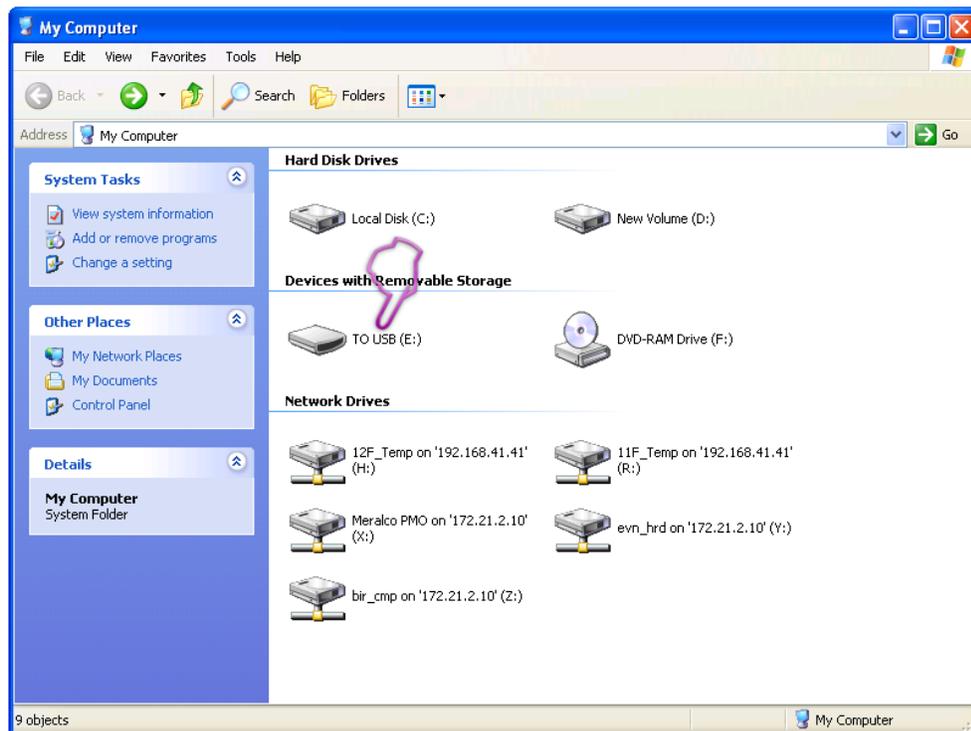




10. Click 'Finish' to complete the installation.

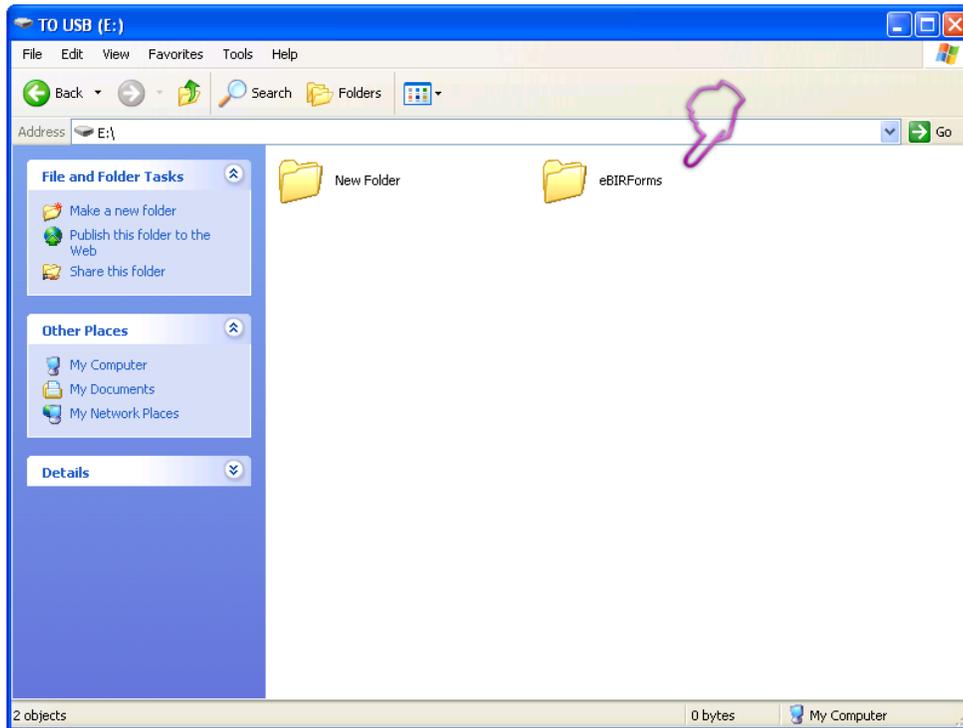


11. Go to My Computer, then click on the USB drive.

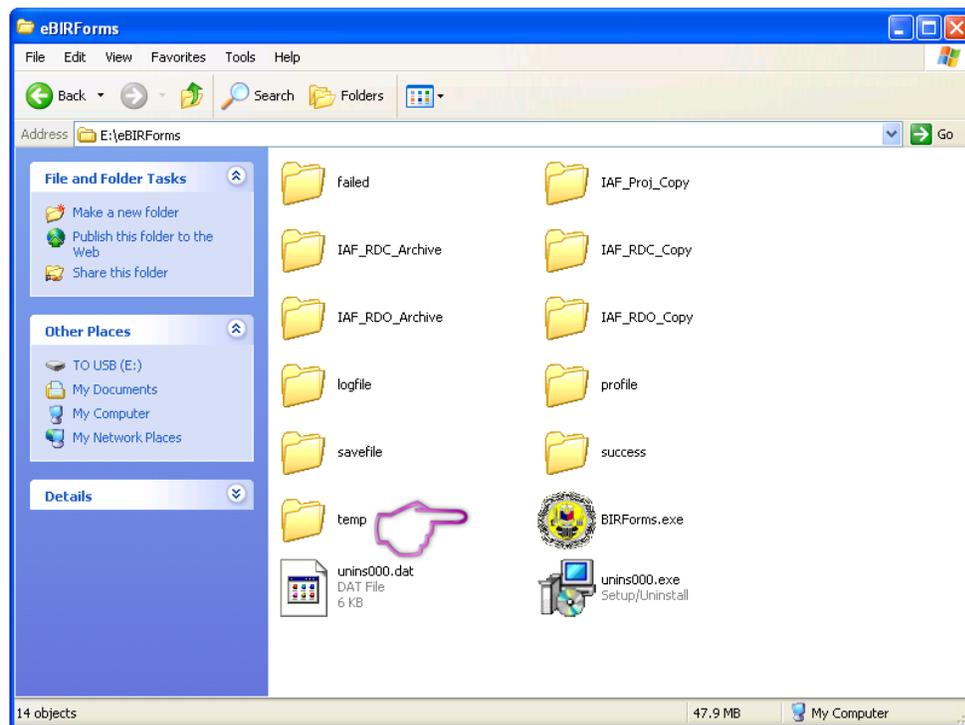




12. Double-click the eBIRForms folder to view the files located inside.



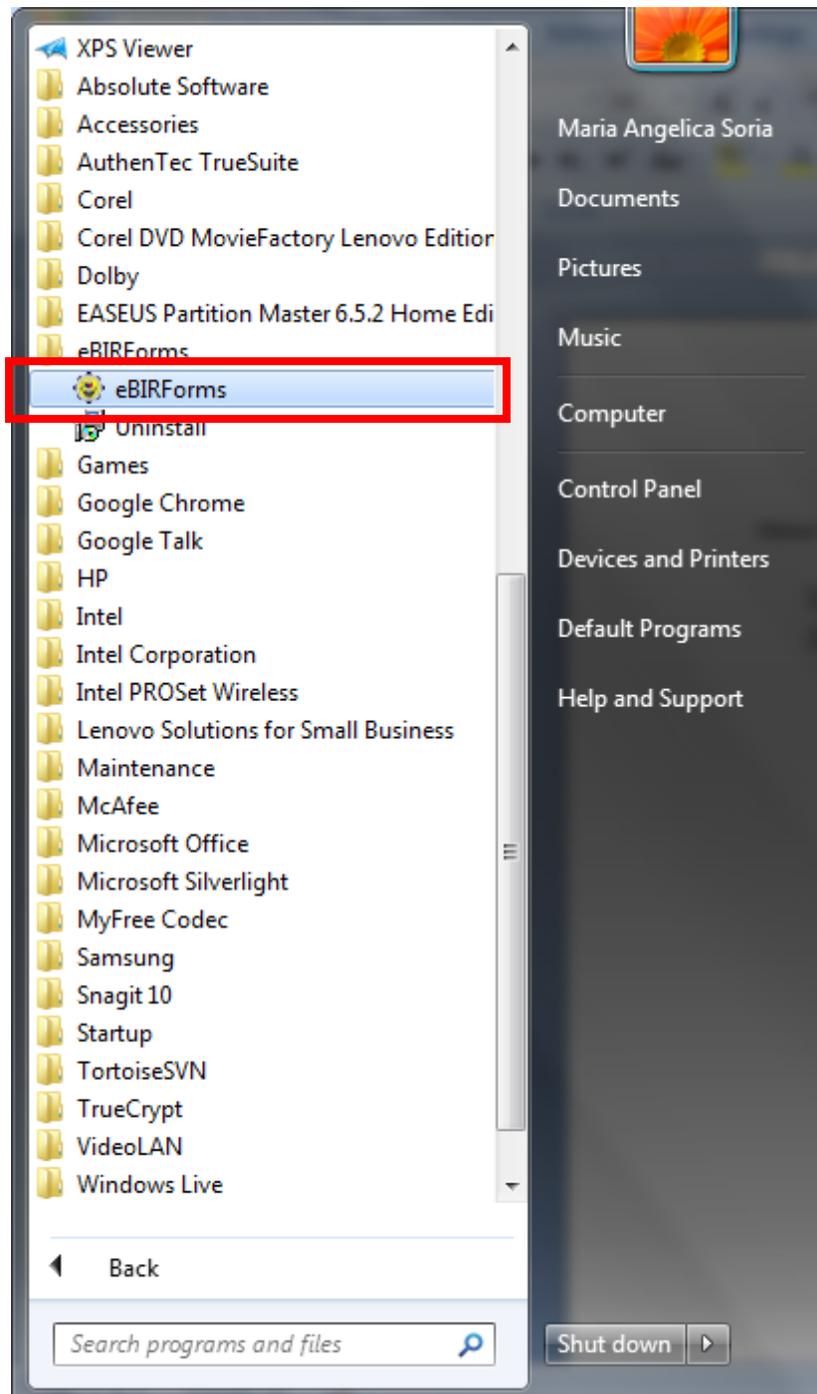
13. To use the eBIRForms Package, click on "BIRForms".





## 5.2. How to Update the Offline eBIRForms Version

1. Open Offline eBIRForms Package

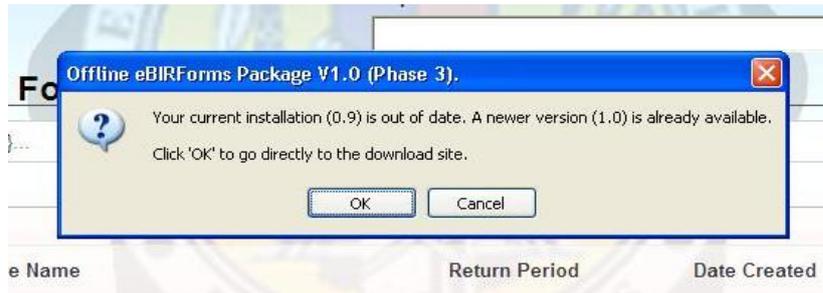


## GUIDE FOR eBIRFORMS

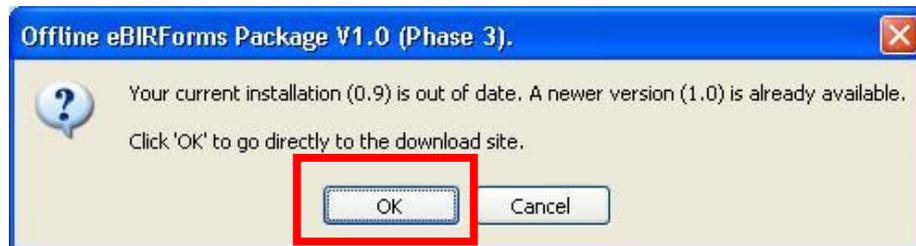
Job Aid for Taxpayers and Accredited Tax Agents



2. Upon opening the application, a version tracker will appear if the user is using an older version of the Offline eBIRForms Package.



3. Click the 'Ok' command button in the dialog box.



4. Upon clicking the 'Ok' command button user will be redirected to the BIR Website (<http://www.bir.gov.ph/ebirforms.htm>) where he/she can download the latest version in the system.

Form No.	Latest Revision Date	Form Name
1	0605 Julv 1999 (ENCS)	Pavment Form

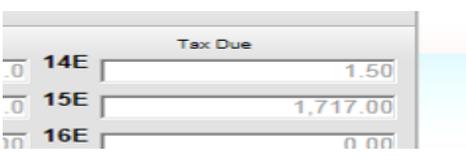
5. Navigate through the page and click on the link to download the latest version.



### 5.3. How to Navigate Through the Form

- If you are using a mouse, just click inside the box that you want to type in.
- If you do not have a mouse:
  - Press the **Tab** key to move to the next box
  - Press **Shift + Tab** key to move back to the previous box
  - Press the left arrow key (←) or the right arrow key (→) to choose between radio buttons

### 5.4. Types of Input

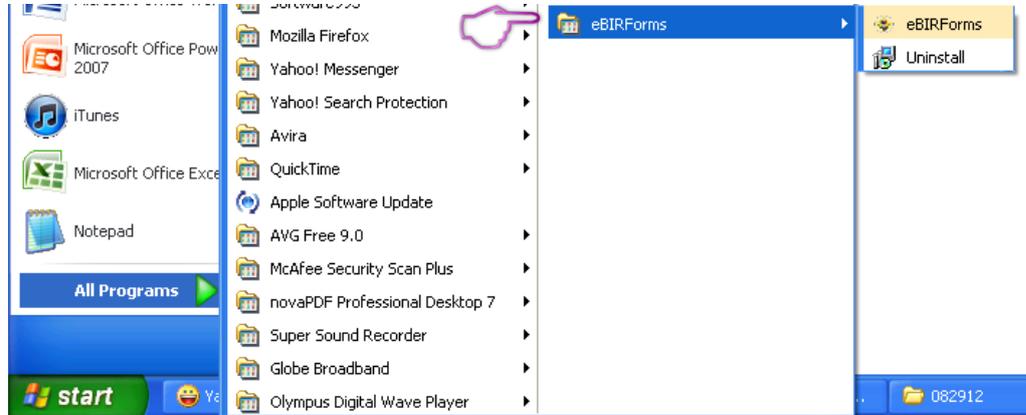
Type of Input	How It Looks Like	Description
Blank Field		These are the boxes where you can enter/edit data.
Radio Button		These are the round buttons that provide the user with options to choose from.
Drop Down		These are the drop down boxes that provide the user with options to choose from.
Computed Field		These are the boxes that are automatically computed based on the data entered by the user.
Hyperlink		These are the blue colored words or group of words that a user can click on to be directed to a new section in the system (e.g. Schedules, ATC, Tax Types).



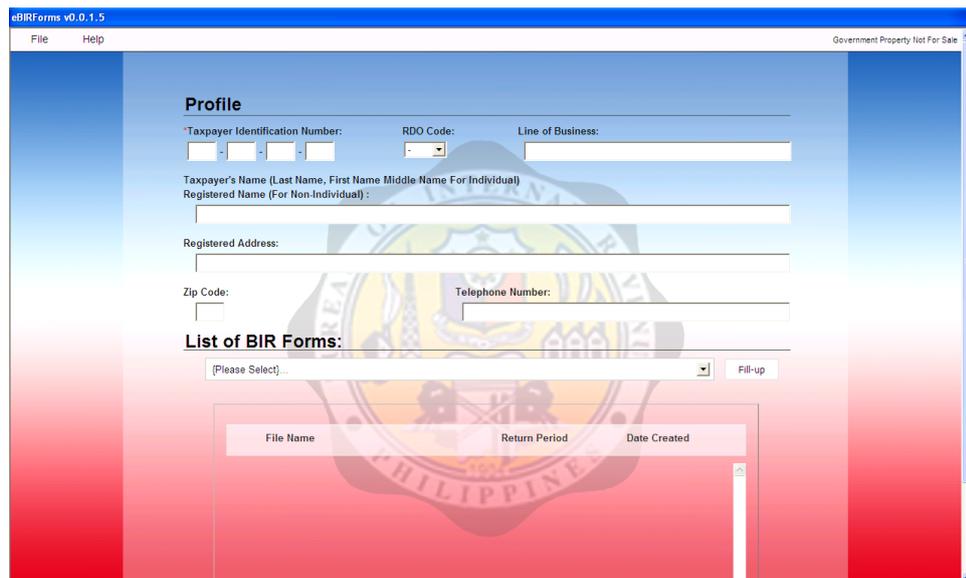
## 5.5. How to Use the eBIRForms Package Offline

### 5.5.1. How to Open the eBIRForms Package

1. Click 'eBIRForms' from shortcut location or destination folder.



2. Upon clicking 'eBIRForms,' the parent screen of the eBIRForms package will appear on your computer screen.



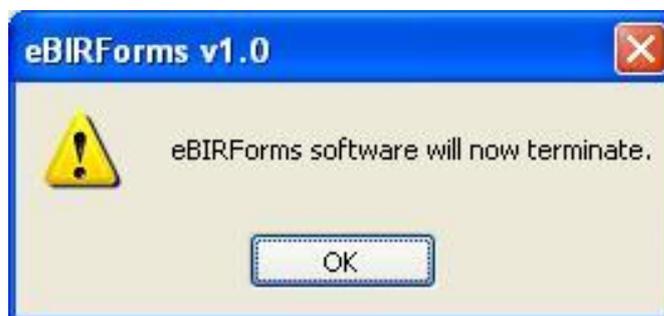
In case that your Local PC is using an older version of the ActiveX Components, an error message will appear, prompting you to download Internet Explorer version 8 or higher. Click 'OK' to proceed to the download site or 'Cancel' should you want to download later.

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



However, clicking 'Cancel' will lead to this message:



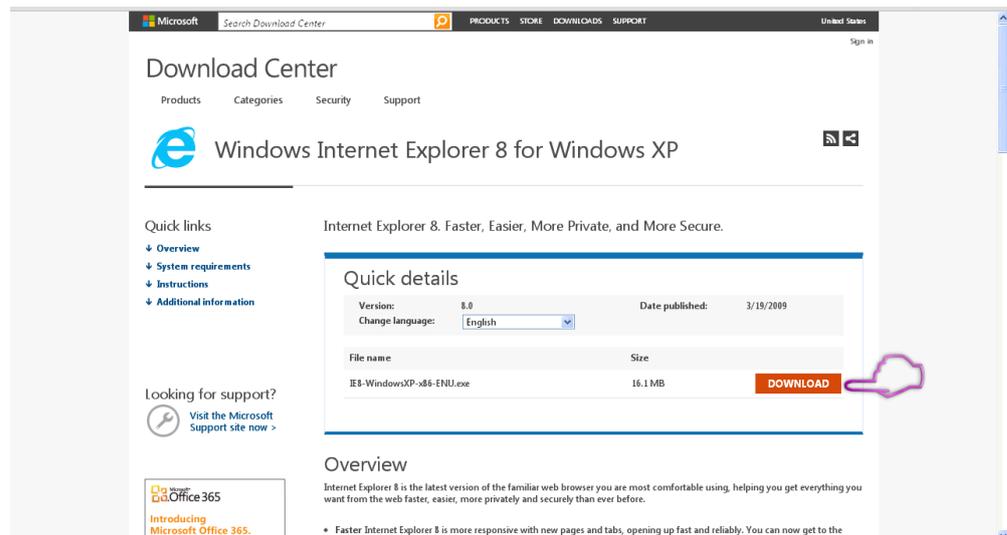


### 5.5.2. How to Install ActiveX Component

3. Click 'OK' to proceed to the download site.



4. Upon clicking 'OK,' you will be directed to the download site. Note that the interface of the site can change. Click the "Download" button for IE8<sup>1</sup>.



<sup>1</sup> This is just a sample browser that has the ActiveX Components.



5. Click 'No Thanks and Continue.'

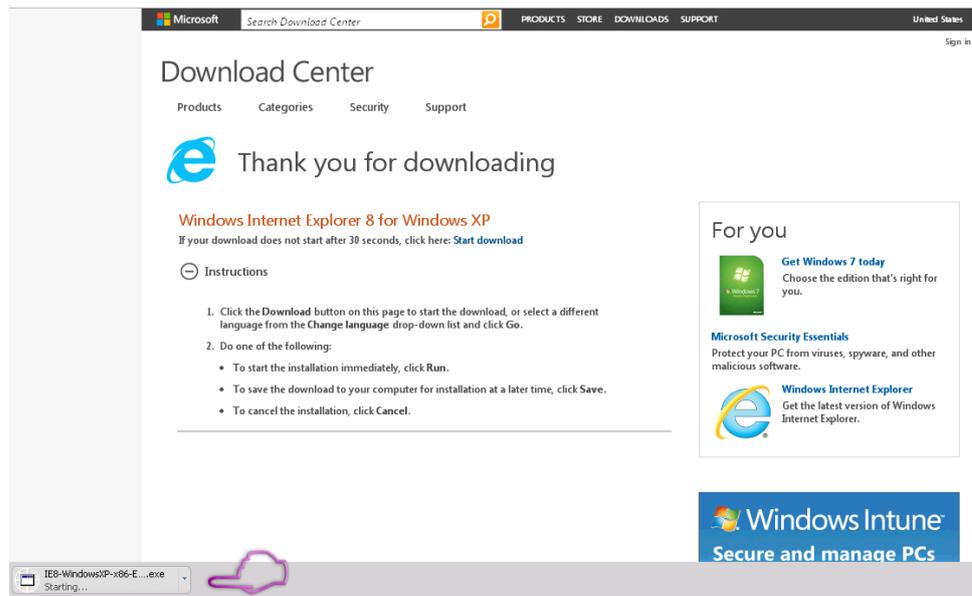
May we also suggest x

Here are some additional downloads to enhance your experience with Microsoft products

File name	Size
<input type="checkbox"/>  <b>Cumulative Security Update for Internet Explorer 8 for Windows XP (KB2618444)</b> This update addresses the vulnerability discussed in Microsoft Security Bulletin MS11-099.	10.1 MB <span style="float: right;">(i)</span>
<input type="checkbox"/>  <b>Microsoft® Windows® Malicious Software Removal Tool (KB890830)</b> This tool checks your computer for infection by specific, prevalent malicious software (including Blaster, Sasser, and Mydoom) and helps to remove the infection if it is found. Microsoft will release an updated version of this tool on the second Tuesday of each month.	15.7 MB <span style="float: right;">(i)</span>
<input type="checkbox"/>  <b>Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint File Formats</b> Install this compatibility pack if you would like to open, edit, and save documents, workbooks, and presentations that were created in the newer versions of Word, Excel, and PowerPoint.	37.0 MB <span style="float: right;">(i)</span>

 **NO THANKS AND CONTINUE**

6. Wait until the download is complete.



Microsoft Search Download Center PRODUCTS STORE DOWNLOADS SUPPORT United States Sign in

## Download Center

Products Categories Security Support

### Thank you for downloading

#### Windows Internet Explorer 8 for Windows XP

If your download does not start after 30 seconds, click here: [Start download](#)

Instructions

- Click the **Download** button on this page to start the download, or select a different language from the **Change language** drop-down list and click **Go**.
- Do one of the following:
  - To start the installation immediately, click **Run**.
  - To save the download to your computer for installation at a later time, click **Save**.
  - To cancel the installation, click **Cancel**.

**For you**

- Get Windows 7 today**  
Choose the edition that's right for you.
- Microsoft Security Essentials**  
Protect your PC from viruses, spyware, and other malicious software.
- Windows Internet Explorer**  
Get the latest version of Windows Internet Explorer.

**Windows Intune**  
Secure and manage PCs

IE8-WindowsXP-x86-E...exe Starting... 

## GUIDE FOR eBIRFORMS

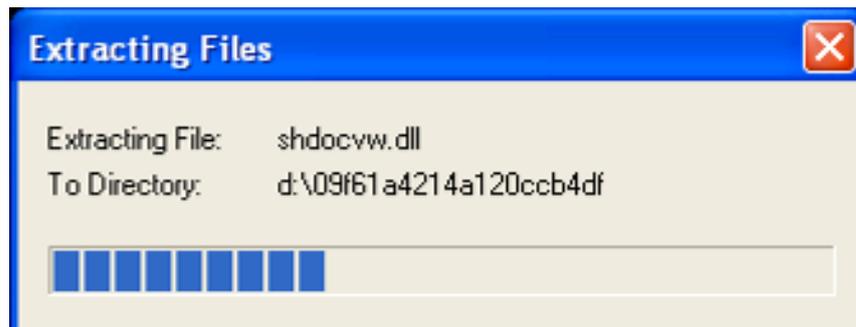
Job Aid for Taxpayers and Accredited Tax Agents



7. Once complete, click on the .exe file to run it. A message box will appear asking if you want to run this file. Click 'Run.'



8. Upon clicking 'Run', a pop-up window will appear showing the status of the files being extracted. Wait until extract is complete.



## GUIDE FOR eBIRFORMS

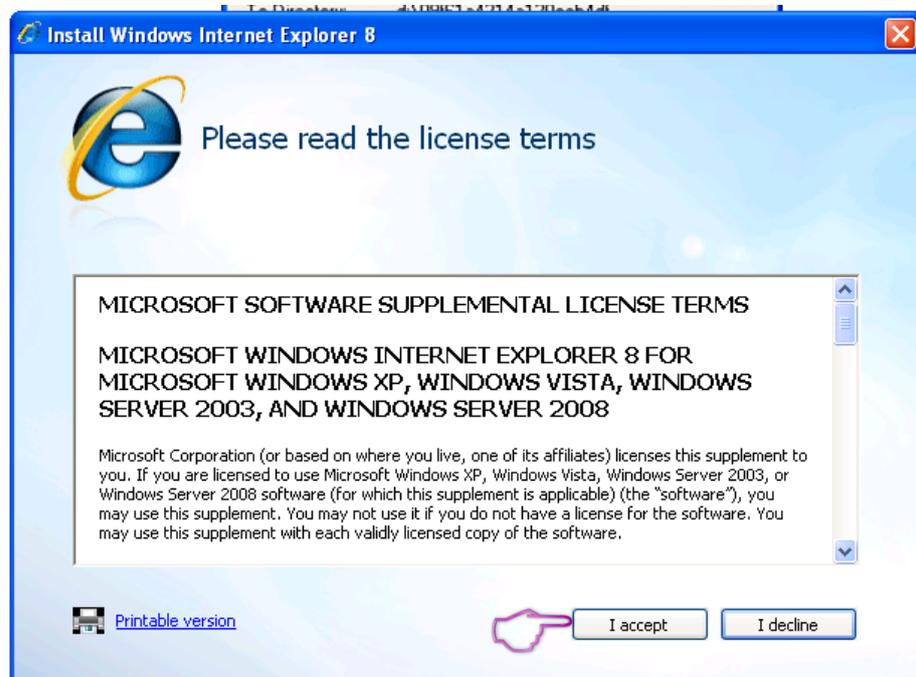
Job Aid for Taxpayers and Accredited Tax Agents



9. Once complete, choose any of the two options by clicking on any of the radio button, then click 'Next.'



10. Upon clicking 'Next', you will be presented with the License Terms of the software. Click 'I accept.'





11. Click 'Next.'



12. Wait until installation is complete.



## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



13. Make sure to save and close all other programs that are in use. Click 'Restart now (recommended).' Your computer will automatically restart. After reboot, the eBIRForms package should be ready to use.





### 5.5.3. How to Fill up the Parent Screen

- **File** consists of “Save” and “Exit”
  - File >> Save – allows the taxpayer to save his/her profile into the system
  - File>> Exit – allows the taxpayer to exit from the system

- **Help** contains the BIR guidelines and instructions for the different forms included in the eBIRForms Package

- Help>> Documentary Stamp – consists of help file for BIR Form No. 2000
- Help>> Excise – consists of help file for BIR Form No. 2200A, 2200AN, 2200M, 2200P and 2200T



## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents

- Help>> Income – consists of help file for BIR Form No. 1701Q, 1702Q and 1704
  - Help>> ONETT – consists of help file for BIR Form No. 1606, 1706, 1707, 1800, 1801, 2000OT
  - Help>> Payment – consists of help file for BIR Form No. 0605, 1600
  - Help>> Excise – consists of help file for BIR Form No. 2200A, 2200AN, 2200M, 2200P and 2200 T
  - Help>> Percentage – consists of help file for BIR Form No. 2551M, 2551Q, 2552, 2553
  - Help>> Value Added Tax – consists of help file for BIR Form No. 2550Q, 2550M
  - Help>> Withholding – consists of help file for BIR Form No. 1600WP, 1601C, 1601E, 1601F, 1602, 1603, 1604CF, 1604E
- **Profile** contains the information that is usually found in Part I (Background Information) of the forms. These input fields auto populate their corresponding fields into the form.

eBIRForms v0.0.1.5

File Help Government Property Not For Sale

**Profile**

Taxpayer Identification Number: 111 - 111 - 111 - 000 RDO Code: 039 Line of Business: Real Estate

Taxpayer's Name (Last Name, First Name Middle Name For Individual)  
Registered Name (For Non-Individual):  
Dela Cruz, Juan Salazar

Registered Address:  
16 Alley2 Project 6, Quezon City

Zip Code: 1100 Telephone Number: 9284563

**List of BIR Forms:**

BIR Form 0605 - Payment Form Fill-up

File Name	Return Period	Date Created



- **List of BIR Forms** contains a dropdown list of the forms included in the eBIRForms Package

The screenshot shows the eBIRForms v0.0.1.5 application window. The 'Profile' section contains the following fields:

- Taxpayer Identification Number: 111 - 111 - 111 - 000
- RDO Code: 039
- Line of Business: Real Estate
- Taxpayer's Name (Last Name, First Name Middle Name For Individual): Dela Cruz, Juan Salazar
- Registered Name (For Non-Individual): Dela Cruz, Juan Salazar
- Registered Address: 16 Alley2 Project 6, Quezon City
- Zip Code: 1100
- Telephone Number: 9284563

The 'List of BIR Forms:' dropdown menu is highlighted with a red circle. Below it is a table with columns for File Name, Return Period, and Date Created.

- **Fill-Up** is also known as the 'New File' button, clicking this will direct the user to the form screen to fill-up a new form

This screenshot is identical to the previous one, showing the eBIRForms v0.0.1.5 application window with the 'Profile' section. The 'List of BIR Forms:' dropdown menu is highlighted with a red circle, and the 'Fill-up' button next to it is also highlighted with a red circle.

## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



- **File Name** is the file name of the saved 'Savefile' in the eBIRForms package that is retrieved when taxpayer enters the Taxpayer's Identification Number and selects a form from the List of BIR Forms.

eBIRForms v0.0.1.5

File Help Government Property Not For Sale

### Profile

Taxpayer Identification Number: 111 - 111 - 111 - 000 RDO Code: 039 Line of Business: Real Estate

Taxpayer's Name (Last Name, First Name Middle Name For Individual)  
Registered Name (For Non-Individual): Dela Cruz, Juan Salazar

Registered Address: 16 Alley2 Project 6, Quezon City

Zip Code: 1100 Telephone Number: 9284563

### List of BIR Forms:

BIR Form 0605 - Payment Form Fill-up

File Name	Return Period	Date Created
-----------	---------------	--------------

- **Return Period** is the return period of the saved form
- **Date Created** is the date when the file was created/saved

eBIRForms v0.0.1.5

File Help Government Property Not For Sale

### Profile

Taxpayer Identification Number: 111 - 111 - 111 - 000 RDO Code: 039 Line of Business: Real Estate

Taxpayer's Name (Last Name, First Name Middle Name For Individual)  
Registered Name (For Non-Individual): Dela Cruz, Juan Salazar

Registered Address: 16 Alley2 Project 6, Quezon City

Zip Code: 1100 Telephone Number: 9284563

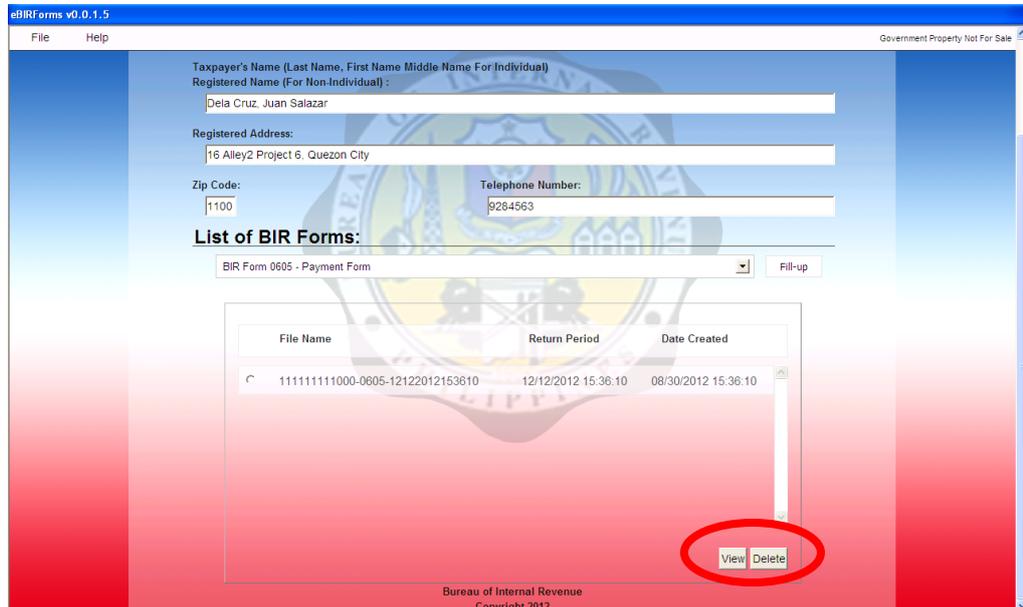
### List of BIR Forms:

BIR Form 0605 - Payment Form Fill-up

File Name	Return Period	Date Created
-----------	---------------	--------------



- **View** allows user to view saved forms
- **Delete** allows user to delete saved forms

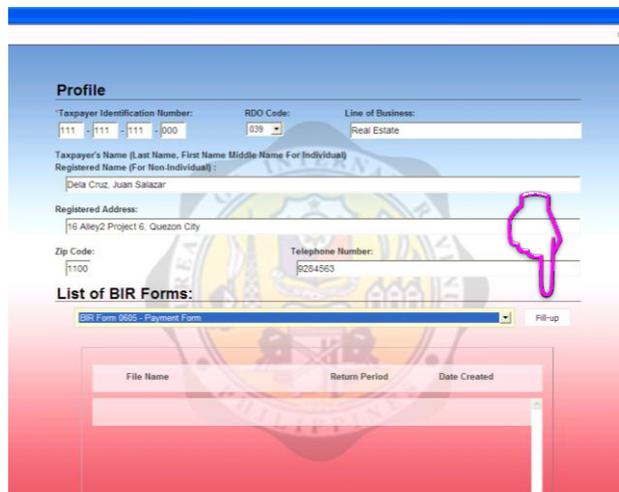


14. Fill- up the input fields under the Profile section.

15. Taxpayer Identification Number is a mandatory field that will be used in saving the taxpayer's profile. If the Taxpayer Identification Number is empty, an error message will appear.



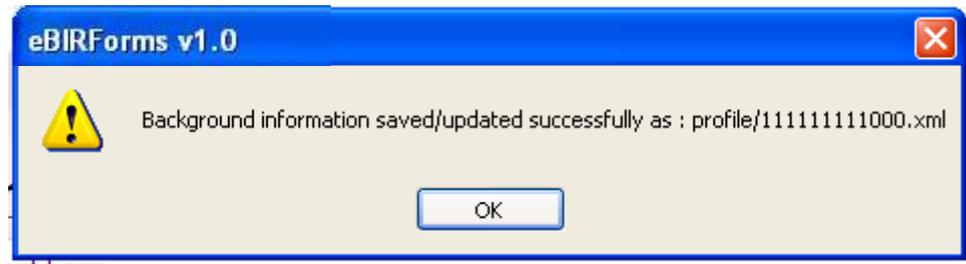
16. Select form to be filled up from the List of BIR Forms. Click 'Fill-up.'



(TIN in sample is 111-111-111-000)

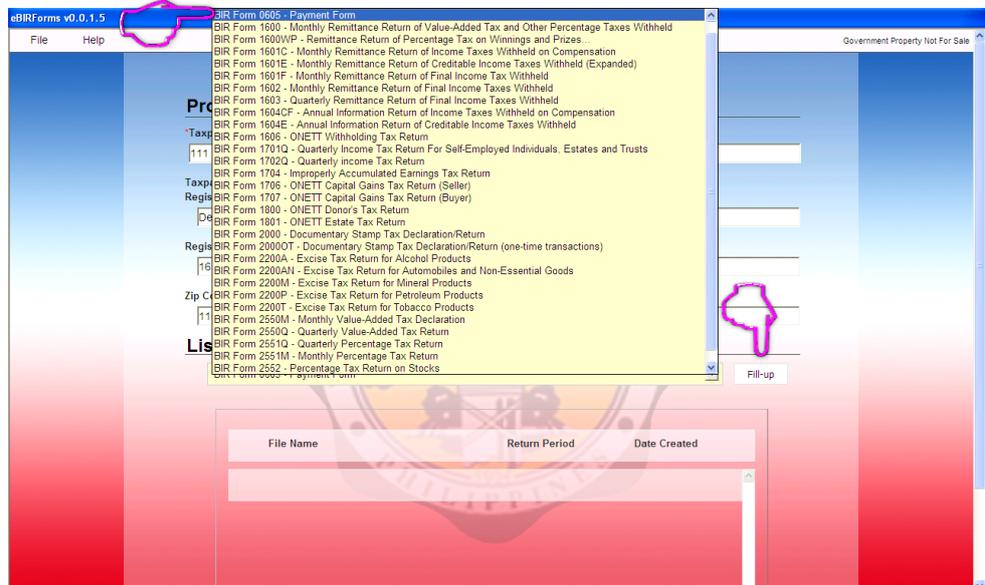


- Upon clicking the Fill-up button a message box will appear, saying that the profile entered is successfully saved in the computer.



### 5.5.4. How to Fill Up a Form

- Select a form from the list of BIR Forms. Click the Fill-up button.



- You will be directed to the form screen.

## GUIDE FOR eBIRFORMS

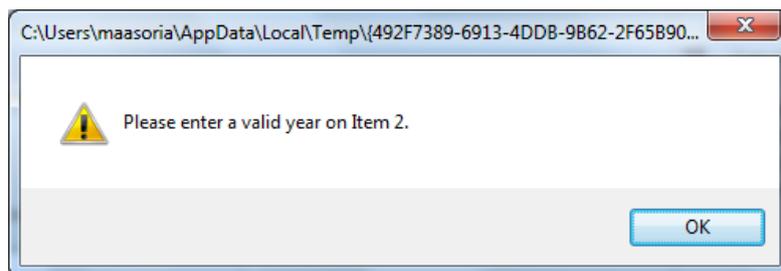
### Job Aid for Taxpayers and Accredited Tax Agents



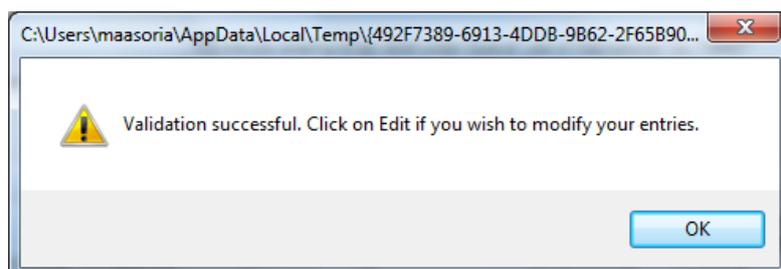
3. Fill-up all mandatory and necessary fields in the form.
4. Select an ATC and Tax Type by clicking the radio button.

ATC	Description
<input type="radio"/> FP010	FINES AND PEN - ON TAX ON INCOME
<input type="radio"/> FP020	FINES AND PEN - ON TAX ON TRANSFERS OF PROPERTY
<input type="radio"/> FP030	FINES AND PEN - ON VALUE-ADDED TAX
<input type="radio"/> FP040	FINES AND PEN - ON OTHER PERCENTAGE TAXES
<input type="radio"/> FP042	FINES AND PEN - ON STOCK TRANS (IPO)
<input type="radio"/> FP050	FINES AND PEN - ON EXCISE TAXES
<input type="radio"/> FP051	FINES AND PEN - ON EXCISE SPECIFIC
<input type="radio"/> FP060	FINES AND PEN - ON DOCUMENTARY STAMP TAXES
<input type="radio"/> FP070	FINES AND PEN - ON MISCELLANEOUS TAXES
<input type="radio"/> FP071	FINES AND PEN - ON ENERGY TAX
<input type="radio"/> FP090	OTHERS FINES AND PENALTIES
<input type="radio"/> FP100	FINES AND PEN - CAPITAL GAINS
<input type="radio"/> FP110	FINES AND PEN - ON COMPENSATION
<input type="radio"/> FP120	FINES AND PEN - ON FINAL
<input type="radio"/> FP130	FINES AND PEN - ON EXPANDED
<input type="radio"/> FP140	FINES AND PEN - GOVERNMENT MONEY
<input type="radio"/> FP141	FINES AND PEN - WINNING AND PRIZES
<input type="radio"/> FP150	FINES AND PEN - BANKS AND FINANCIAL INSTITUTION
<input type="radio"/> FP160	FINES AND PEN - ESTATE TAX
<input type="radio"/> FP170	FINES AND PEN - DONORS TAX

5. After filling up the form, the user may do any of the following:
  - Validate
    - Upon clicking the 'Validate' button, the system will validate the mandatory fields. A message box will appear, informing the user of the input fields that need to be filled out before successful validation. Click 'OK' then fill-out the field identified by the system.



- If validation is successful a message box will be prompted by the system. Click 'OK'.



## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



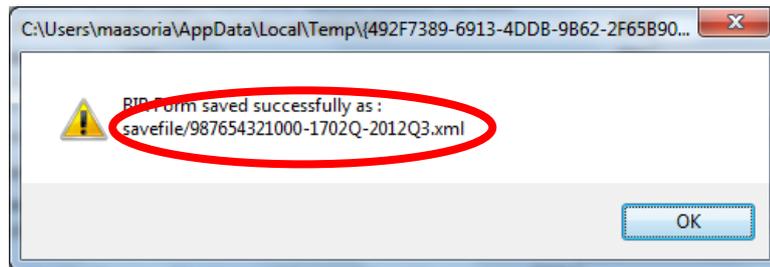
- Edit
  - This command button is only enabled upon successful validation.
  - Allows the user to edit the information that has been validated by the system.

6			ATC					0.00
7			ATC					0.00
8			ATC					0.00
9			ATC					0.00
10			ATC					0.00
Total								0.00

Buttons: Validate, Edit, Submit, Save, Print, Final Copy



- Save
  - Allows the user to save the form in the 'Savefile' folder even without validation occurred.
  - Message box will prompt confirming that the form has been saved with its corresponding filename. The filename is automatically generated in this format: TIN-Form No.-Return Period. Sample used below:
    - TIN: 987-654-321-000
    - Form No: 1702Q
    - Return Period: 2012Q3



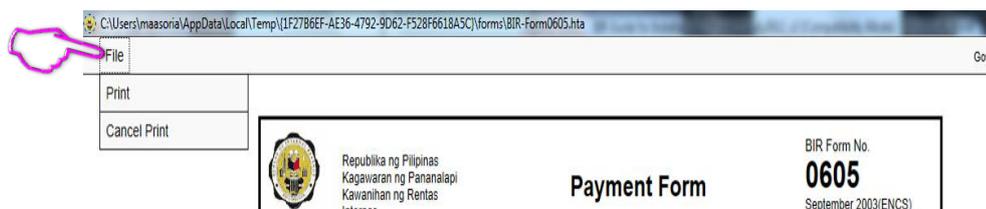
- Print
  - Upon clicking print button, user will be directed to the print preview screen of the form to be printed.

6			ATC					0.00
7			ATC					0.00
8			ATC					0.00
9			ATC					0.00
10			ATC					0.00
Total								0.00

Buttons: Validate, Edit, Submit, Save, Print, Final Copy



- Go to the Menu Bar and Click on 'File'

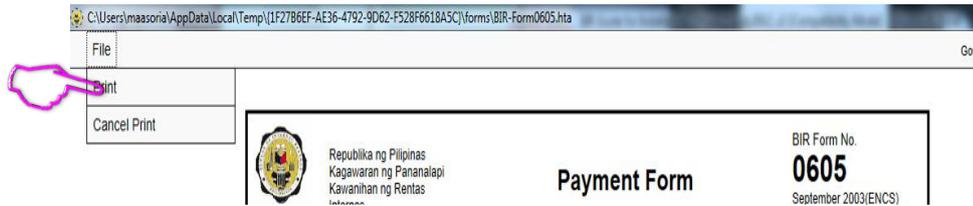


## GUIDE FOR eBIRFORMS

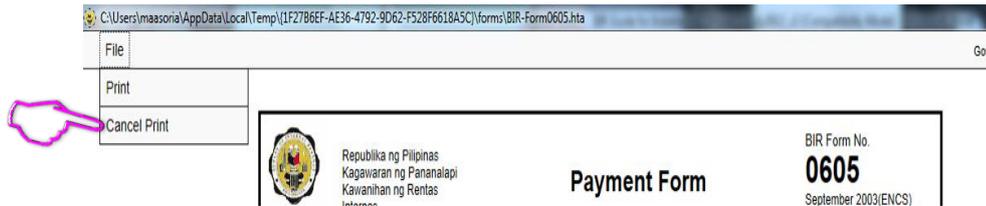
### Job Aid for Taxpayers and Accredited Tax Agents



- To print the accomplished form click on 'Print', and then user will be directed to the printer options.



- To cancel print click on 'Cancel Print', and then user will be directed to the Form Screen.



- Final copy
  - The 'Final Copy' command button is enabled only after validation is successful.

6			ATC					0.00
7			ATC					0.00
8			ATC					0.00
9			ATC					0.00
10			ATC					0.00
Total								0.00

Buttons: Validate Edit Submit Save Print Final Copy

- Upon clicking 'Final Copy' a message box will be prompted by the system that the file is saved and encrypted.

- Submit Button
  - The submit command button is only enabled only after validation is successful. Clicking this button will direct users to the Log-in page of the Online eBIRForms System.

6			ATC					0.00
7			ATC					0.00
8			ATC					0.00
9			ATC					0.00
10			ATC					0.00
Total								0.00

Buttons: Validate Edit Submit Save Print Final Copy



### 5.5.5. How to Return to Parent Screen

1. From the form screen go to 'File' at the Menu Bar.

The screenshot shows the BIR Form 0605 Payment Form interface. The 'File' menu option in the top-left corner is circled in red. The form contains the following fields:

1 For the Calendar Fiscal	3 Quarter	4 Due Date (MM/DD/YYYY)	5 No. of Sheets Attached	6 ATC
2 Year Ended (MM/YYYY)	1st 2nd 3rd 4th		0	
03 - March	2013			
7 Return Period (MM / DD / YYYY)		8 Tax Type		
<b>Part I Background Information</b>				
9 Taxpayer Identification No.	10 RDO Code	11 Taxpayer Classification	12 Line of Business/Occupation	
456 789 123 000	005	I N	BUSINESS ANALYST	
13 Taxpayer's Name (Last Name, First Name, Middle Name for Individuals) (Registered Name for Non-Individuals)			14 Telephone Number	
SORIA, LICA HERNANDEZ			9286789	
15 Registered Address			16 Zip Code	
7-A ROAD 6 PROJECT 6 QUEZON CITY			1100	
17 Manner of Payment		Per Audit/Delinquent Account		18 Type of Payment
Voluntary Payment		Preliminary/Final Assess/Deficiency Tax		No. of Installment
<input type="radio"/> Self-Assessment		<input type="radio"/> Accounts Receivable/Delinquent Account		<input type="radio"/> Partial Payment
<input type="radio"/> Penalties		<input type="radio"/> Income Tax: Second Installment(Individual)		<input type="radio"/> Full Payment
<input type="radio"/> Tax Deposit/Advance Payment		<input type="radio"/> Others(Specify)		
<b>Part II Computation of Tax</b>				
19 Basic Tax/Deposit/Advance Payment			19 0.00	
20 Add: Penalties				
Surcharge Interest Compromise				
20A 0.00	20B 0.00	20C 0.00	20D 0.00	
21 Total Amount Payable(Sum of Items 19 & 20D)				21 0.00
<input type="checkbox"/> Pre-approved by Investigating Office <input type="checkbox"/> Not approved by Investigating Office				
Validate Edit Submit Save Print Final Copy				

2. Click 'File' then select Main Screen.

The screenshot shows the BIR Form 0605 Payment Form interface with the 'File' menu open. The 'Main Screen' option is circled in red. The form displays the following information:

1 For the Calendar Fiscal	3 Quarter	4 Due Date (MM/DD/YYYY)	5 No. of Sheets Attached	6 ATC
2 Year Ended (MM/YYYY)	1st 2nd 3rd 4th	07 30 2012	0	MC180
12 - December	2012			
7 Return Period (MM / DD / YYYY)	07 30 2012	8 Tax Type	RF	
<b>Part I Background Information</b>				
9 Taxpayer Identification No.	10 RDO Code	11 Taxpayer Classification	12 Line of Business/Occupation	
111 111 111 000	039	I N	REAL ESTATE	
13 Taxpayer's Name (Last Name, First Name, Middle Name for Individuals) (Registered Name for Non-Individuals)			14 Telephone Number	
DELA CRUZ, JUAN SALAZAR			9284563	
15 Registered Address			16 Zip Code	
16 ALLEY 2 PROJECT 6, QUEZON CITY			1100	
17 Manner of Payment		18 Type of Payment		

3. Upon clicking 'Main Screen', you will be directed to the Parent Screen of the System.



### 5.5.6. How to View or Delete Saved Form

1. Fill-up the Taxpayer Identification Number to be able to retrieve previously saved profile. Select the applicable form from the List of BIR Forms to be able to retrieve previously saved files.

**Profile**

Taxpayer Identification Number: 111 - 111 - 111 - 000 RDO Code: 039 Line of Business: Real Estate

Taxpayer's Name (Last Name, First Name Middle Name For Individual)  
Registered Name (For Non-Individual): Dela Cruz, Juan Salazar

Registered Address: 16 Alley2 Project 6, Quezon City

Zip Code: 1100 Telephone Number: 9284563

**List of BIR Forms:**  
BIR Form 0605 - Payment Form Fill-up

File Name	Return Period	Date Created

2. Select the file to be viewed or deleted then click on 'View' to view saved file or 'Delete' to delete saved file.

Taxpayer's Name (Last Name, First Name Middle Name For Individual)  
Registered Name (For Non-Individual): Dela Cruz, Juan Salazar

Registered Address: 16 Alley2 Project 6, Quezon City

Zip Code: 1100 Telephone Number: 9284563

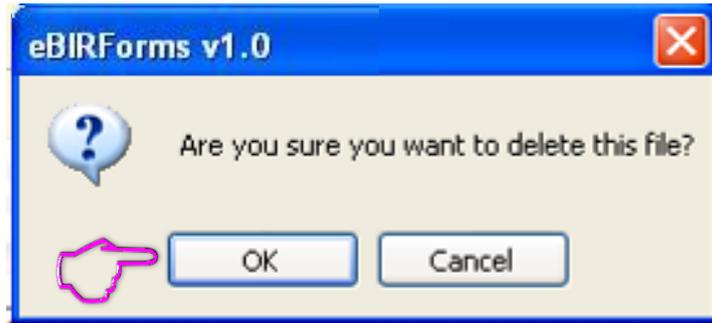
**List of BIR Forms:**  
BIR Form 0605 - Payment Form Fill-up

File Name	Return Period	Date Created
11111111000-0605-12122012153610	12/12/2012 15:36:10	08/30/2012 15:36:10

View Delete

Bureau of Internal Revenue  
Copyright 2012

3. Upon clicking the 'Delete' button a confirmation message will appear to confirm the deletion of the selected file. Click 'OK' to delete file or 'Cancel' to cancel file deletion.



## 5.6. How to Print and Sign the Form

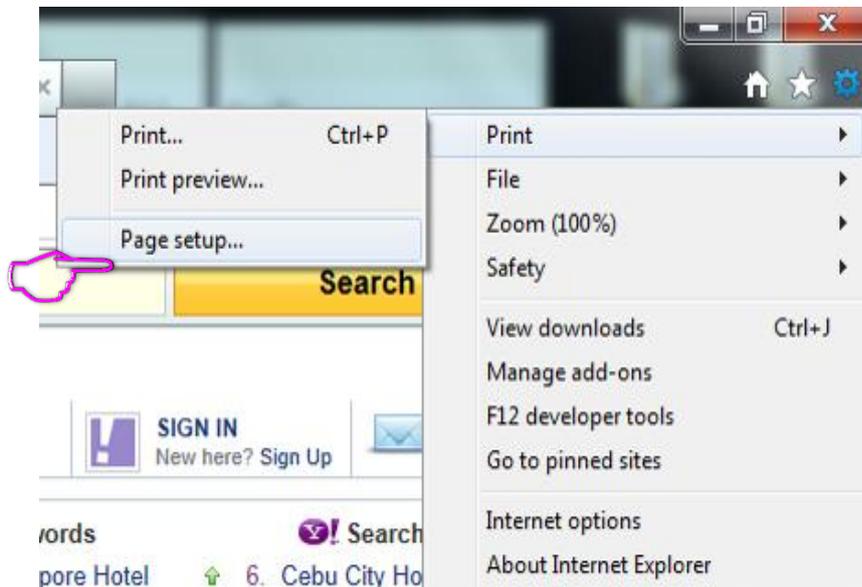
1. Click on the Internet Explorer Icon to adjust print settings.



2. Find and click the Settings button.



3. Choose print, then click on page setup. A default print setup will be shown.

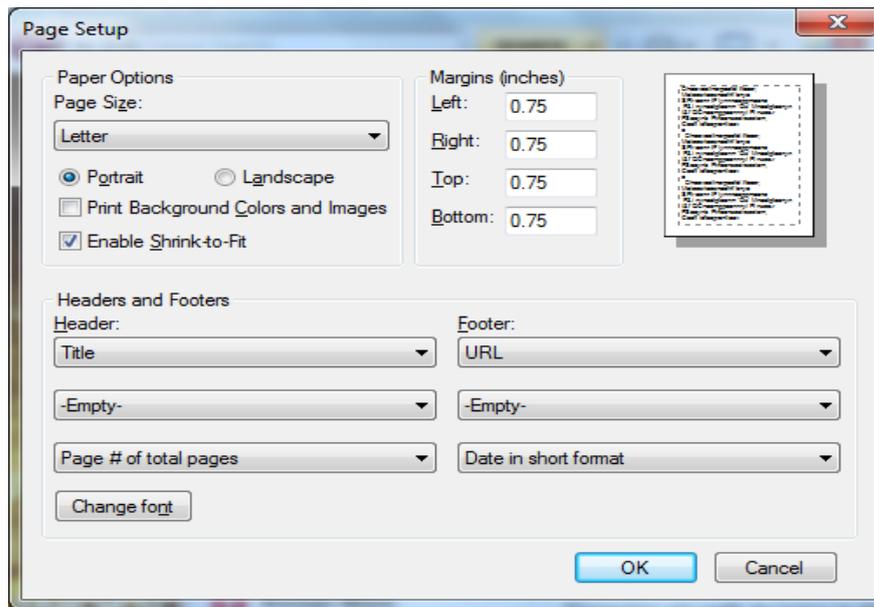


## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents

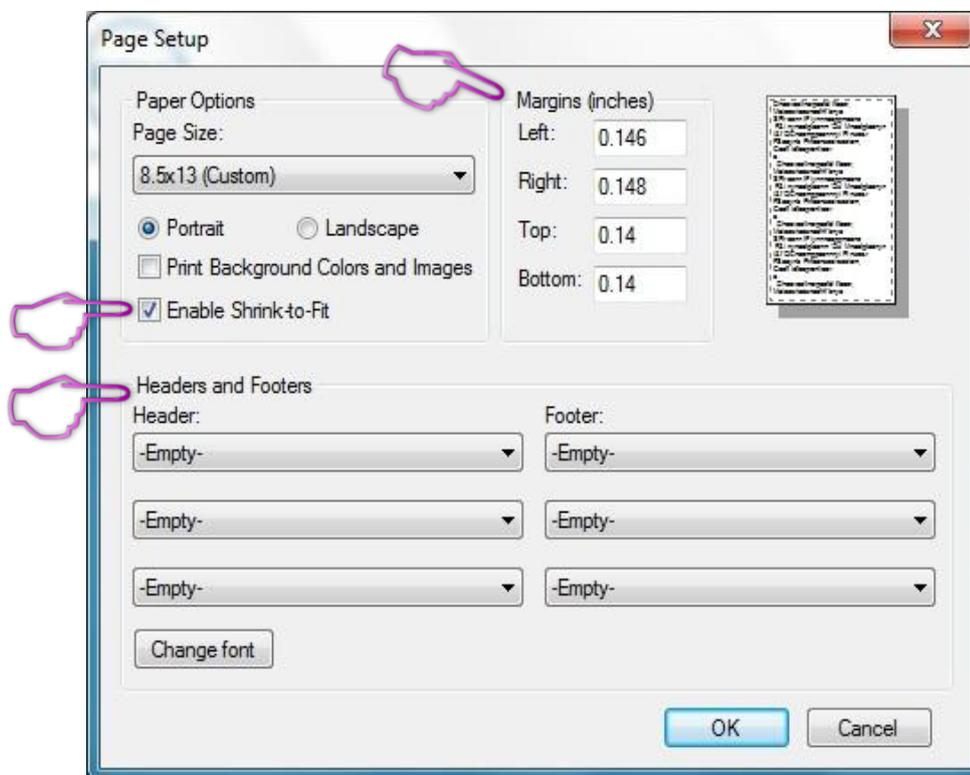


- Click 'Page Setup' to be directed to the default window of Page Setup.



- Printer Setting:

- Default Margin must be the minimum settings possible (Left: 0.146 inch, Right: 0.148, Top: 0.14, Bottom: 0.14 inches).
- Check 'Enable Shrink-to-fit.'
- All headers and footers must be empty.



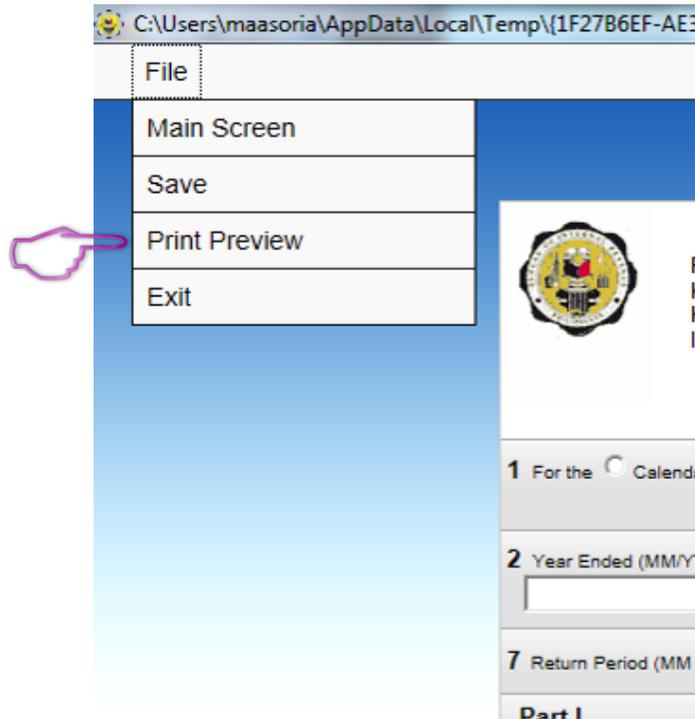
- Click 'Ok' after changes have been done.

# GUIDE FOR eBIRFORMS

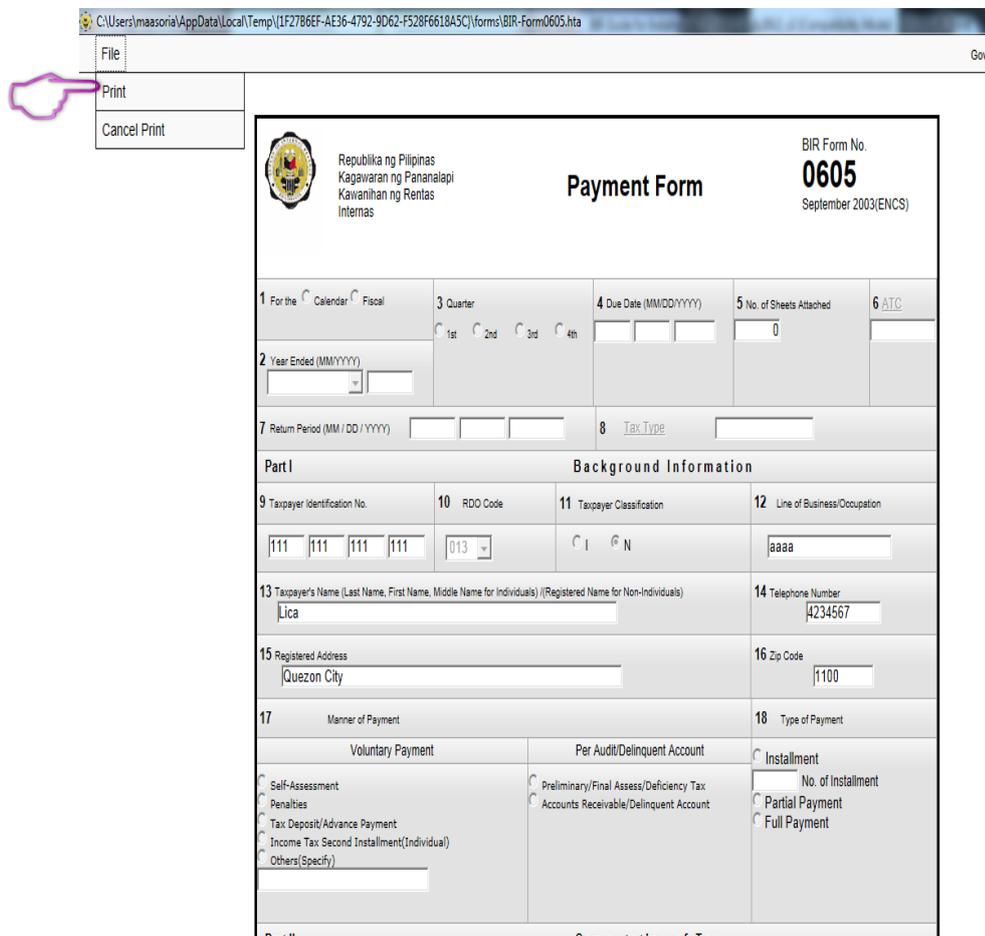
Job Aid for Taxpayers and Accredited Tax Agents



7. Go to the specific form to be printed from the eBIRForms Package then click 'Print Preview' from the menu bar.

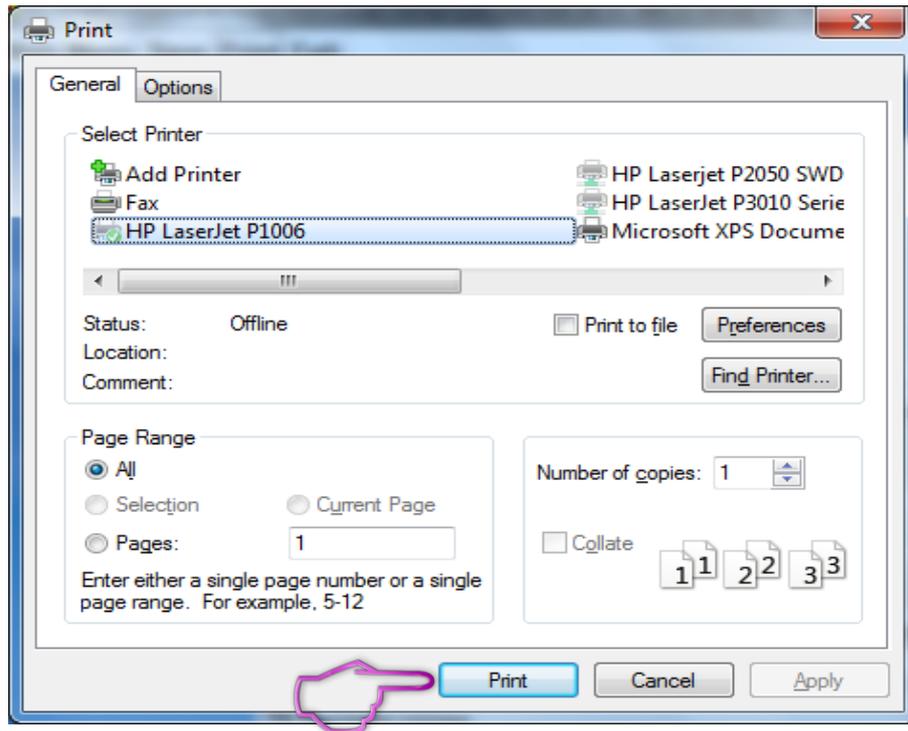


8. From the menu bar of the Print Screen select 'Print.'





9. Select a printer, then Click 'Print.'



**Note:** When printing “**Schedule 1**” of Excise Tax Return Forms, set the printing orientation to “**landscape.**”

1. Click the ‘Schedule 1’ hyperlink.

BR Form No. 2200-M

File Government Property Not For Sale

**SCHEDULE 1 SUMMARY OF REMOVALS AND EXCISE TAX DUE ON MINERAL PRODUCTS CHARGEABLE AGAINST PAYMENTS**

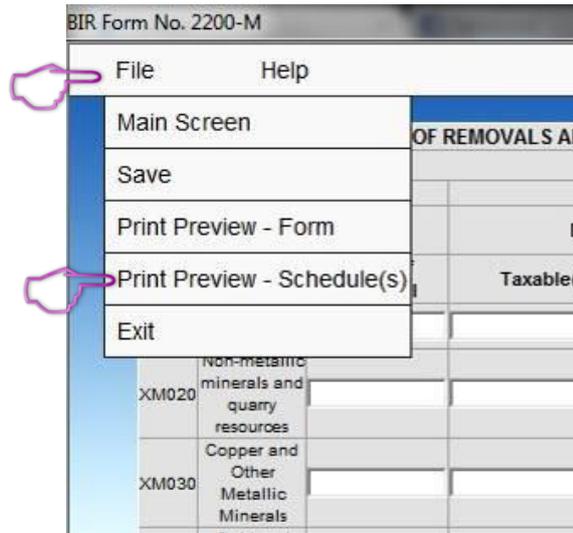
ATC	Description	Place of Removal	Volume of Mineral Removed		Provisional			Final			Adjustment	
			Taxable(A)	Exempt(B)	Actual/Fair Market Value Taxable(C)	Exempt(D)	Tax Rate (E %)	Tax Due (F)	Actual/Fair Market Value Taxable(G)	Exempt(H)		Tax Rate (I %)
30010	Coal and Coke		0.00	0.00	0.00	0.00	10.00%MT	0.00	0.00	0.00	10.00%MT	0.00
30020	Non-metallic minerals and quarry resources		0.00	0.00	0.00	0.00	2.00%	0.00	0.00	0.00	2.00%	0.00
30030	Copper and Other Metallic Minerals		0.00	0.00	0.00	0.00	2.00%	0.00	0.00	0.00	2.00%	0.00
30040	Gold and Chromite		0.00	0.00	0.00	0.00	2.00%	0.00	0.00	0.00	2.00%	0.00
30050	Indigenous Petroleum		0.00	0.00	0.00	0.00	3.00%	0.00	0.00	0.00	3.00%	0.00
30051	Natural Gas or Liquefied Natural Gas (locally extracted)		0.00	0.00	0.00	0.00	0.00%	0.00	0.00	0.00	0.00%	0.00
Others (Please Specify)												
			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL TAX DUE</b>												

## GUIDE FOR eBIRFORMS

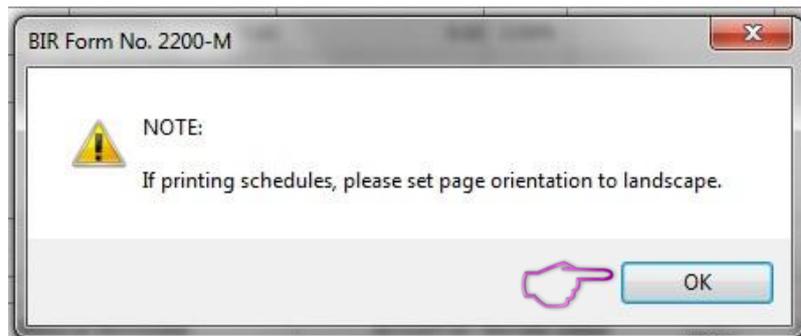
Job Aid for Taxpayers and Accredited Tax Agents



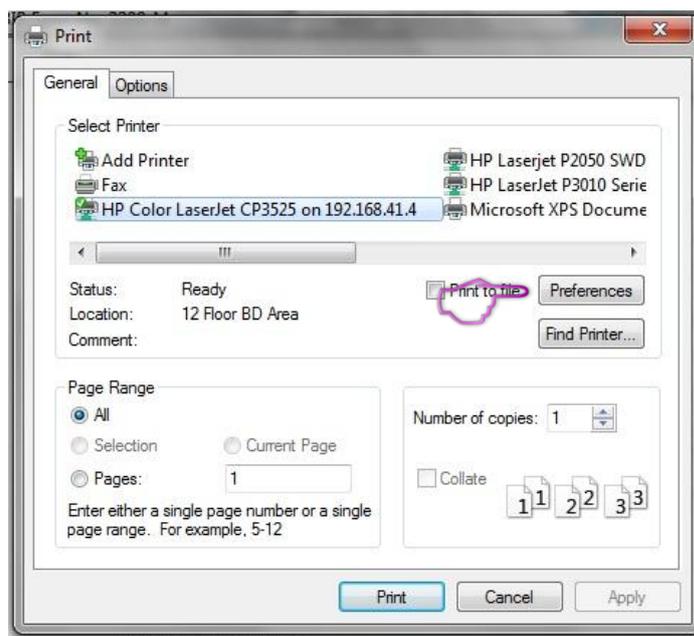
2. After completing 'Schedule 1', click 'File', then 'Print Preview – Schedule(S).'



3. Upon clicking 'Print Preview – Schedule(s)' a message box will inform you to set page orientation to landscape. Click 'OK.'



4. Click 'Preferences.'

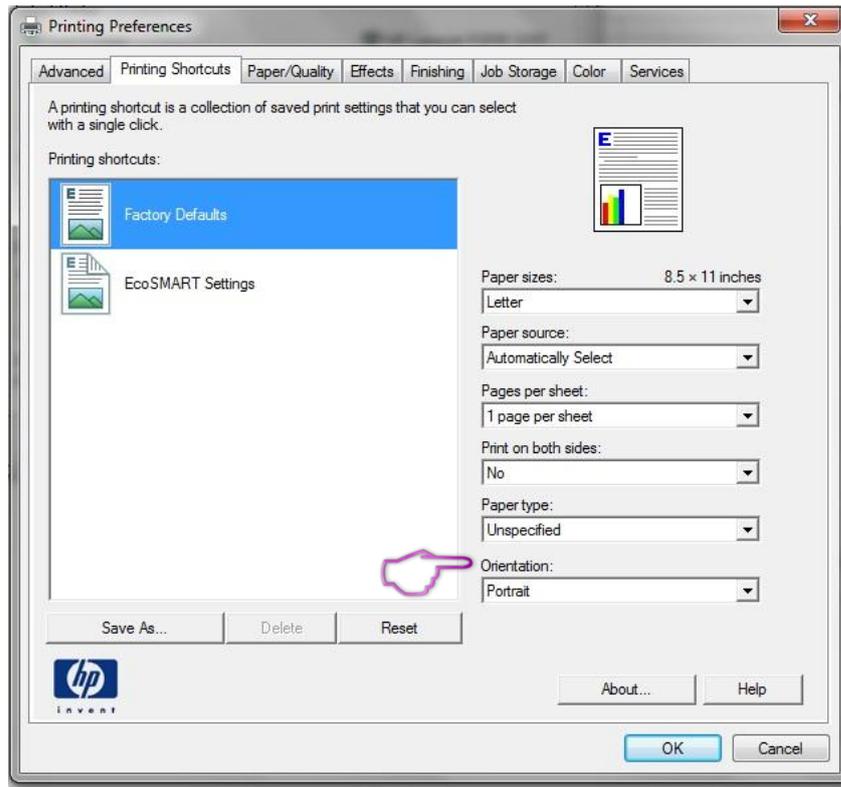


## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



5. Click the 'Printing Shortcuts' tab. Set the 'Orientation' to 'Landscape.'



6. Click 'OK.'



## 6. How to Use the Online eBIRForms System

### 6.1. Enrollment

#### 6.1.1. How to Enroll in the System

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



2. Click on the Sign-up tab.



## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



- Acknowledge and agree to the eBIRForms Terms of Service Agreement (ToSA) by clicking on the check box at the bottom of the screen. Click "Proceed to Registration".

www.ph/prod1/portal/portal.jsp?c=7727&p=15660&g=37273

ns Portal Update via Registrati... https://www.google... eFPS Home - eFiling... JTTrac

 **Bureau of Internal Revenue**  
Republic of the Philippines

Home Login Sign-up Download Forms Contact Us FAQs BIR Website

**eBIRForms Terms of Service Agreement**

Thank you for visiting the eBIRForms webpage. By accessing and/or using any part of this website and eBIRForms System (including the online and offline services), herein collectively called the "Service", you shall be deemed to have accepted to be legally bound by these Terms of Service. Please review the following terms carefully. If you do not agree to these Terms of Service, please do not use the Service. The terms "Bureau", "we", "us" and "our" refer to the Bureau of Internal Revenue or BIR, the legal name of the owner of the website. The term "you" refers to the taxpayer, tax agent, tax software provider or any user or viewer of our site. The Bureau reserves the right to modify these terms or provide additional terms from time to time. The continued use of the Service following the posting of any changes to the Terms of Service constitutes your acceptance of such changes.

**1. Description of Service**

The Service provides you with the facility to file/submit returns and pay taxes due thereon using the eBIRForms offline package. It also receives returns generated by the third party software and filed by the taxpayer and tax agent.

The Service provides you with the following offline and online services:

- > download offline tax preparation software package
- > taxpayer, tax agent and tax software provider enrollment
- > file/submit tax returns and attachments

I hereby agree to be governed by the terms and conditions of the eBIRForms Online Services Terms of Service Agreement. I hereby also acknowledge to have read and fully understood the said terms and conditions.

[Proceed to Registration](#) [Cancel](#)

Download Forms | Contact Us | FAQs

2012 Copyright © bir.gov.ph All rights reserved.  
bir.gov.ph is under the supervision of the Information Systems Group of the Bureau of Internal Revenue.

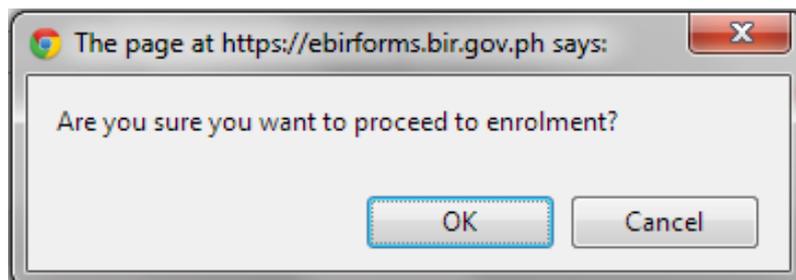
## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



4. Fill-up fields required<sup>2</sup> under enrollment.

5. Click “Proceed” button to go to the next screen.
6. A message box will appear asking if the user wants to proceed with enrollment. System will validate information.



<sup>2</sup> Required fields are those with red asterisk

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



7. Upon successful validation, user will be redirected to the User Classification page. Put a check on the applicable check box. Click "Submit".

A screenshot of the Bureau of Internal Revenue (BIR) website's user classification page. The page header includes the BIR logo and the text 'Bureau of Internal Revenue Republic of the Philippines'. A navigation bar contains links for Home, Login, Sign-up, Download Forms, Contact Us, FAQs, and BIR Website. A yellow notification box at the top states 'Application "APP-121227-0381" has been created.' Below this, a grey box prompts the user to 'Please choose your User Classification if applicable.' There are two main options: 'TAX AGENT' and 'TAX SOFTWARE PROVIDER'. Under 'TAX AGENT', there are input fields for 'GPP/Company (if applicable)' and 'Accreditation Number'. A 'Submit' button is located at the bottom of the form. A note at the bottom of the form reads: 'Note: If you are not a tax agent or a tax software provider please click on Submit'. The footer contains links for 'Download Forms | Contact Us | FAQs', copyright information for 2012, and a statement that the website is under the supervision of the Information Systems Group of the Bureau of Internal Revenue.

\*If validation is unsuccessful, an error message will appear informing the user that the information he/she provided does not match his/her information in the ITS Registration. The user will be allowed to proceed with enrollment, however; he/she will be required to update his/her information in the ITS-REG.



## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



8. After submission user will be directed to an instruction screen on what to do next to be able to activate his/her account.

The screenshot displays the Bureau of Internal Revenue (BIR) website interface. At the top, there is a navigation bar with links for Home, Login, Sign-up, Download Forms, Contact Us, FAQs, and BIR Website. Below the navigation bar, the main content area is titled "Account Activation Instruction". It contains two sections: "Instructions:" and "Reminders:". The "Instructions:" section lists the following steps for Taxpayer/Tax Software Provider Individual: Print the e-mail enrollment notification, Go to your Revenue District Office (RDO), Present 2 Valid ID's and the printed e-mail notification, and Submit a copy of your letter of intent. For authorized representative, it lists: Authorization Letter, 2 valid IDs of principal, and 2 valid IDs of representative. The "Reminders:" section contains three numbered points regarding enrollment limits and officer requirements. At the bottom of the instruction box, there is a "Go to Homepage" link. The footer of the page includes "Download Forms | Contact Us | FAQs", "2012 Copyright © bir.gov.ph All rights reserved.", and "bir.gov.ph is under the supervision of the Information Systems Group of the Bureau of Internal Revenue."

### Account Activation

- I. Go to your respective RDO Office and present account activation requirements to the Taxpayer Service Section.

### Account Activation Requirements:

If you are enrolling as a:

#### A. Taxpayer – Individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent

#### B. Taxpayer – Non-individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the



Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

**C. Taxpayer and Tax Agent – Individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation

**D. Taxpayer and Tax Agent – Non-individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

**E. Taxpayer and Tax Software Provider – Individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. TSP Application Form
5. Copy of BIR Registration
6. Copy of Registration Fee Payment
7. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure

**F. Taxpayer and Tax Software Provider – Non-individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. TSP Application Form
5. Copy of BIR Registration
6. Copy of Registration Fee Payment
7. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure
8. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

**G. Taxpayer, Tax Agent and Tax Software Provider – Individual**

1. Printed e-mail enrollment notification

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. TSP Application Form
7. Copy of BIR Registration
8. Copy of Registration Fee Payment
9. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure

### H. Taxpayer, Tax Agent and Tax Software Provider – Non-individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. TSP Application Form
7. Copy of BIR Registration
8. Copy of Registration Fee Payment
9. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure
10. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

\*If you have an authorized representative, representative should also present the following:

- a. Authorization Letter
- b. 2 valid IDs of authorized representative

### Reminders:

1. Individual and corporate taxpayers shall be allowed to enroll up to a maximum of three (3) user accounts for a particular TIN.
2. For juridical entities or artificial persons, enrollment shall be made by the officers required by law to file the returns. Thus, for domestic corporations, it shall either be the President, Vice President or other principal officers; for partnerships, the managing partner; for joint ventures, the managing head; and for resident foreign corporation, the head country manager.
3. The principal officer may delegate enrollment and filing of returns, however, an authorization must be issued by the principal officers delegating enrollment and filing to particular/identified company personnel.

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



- II. RDO Officer will activate account of the user.
  - III. Enrollee will receive an email from BIR containing his default account username and password.
9. Upon receipt of the eBIRForms system-generated e-mail, log in to the system using the account username and password provided in the e-mail. Go to the eBIRForms home page and click on the Login tab.

10. Upon initial log-in, user is required to change his/her password. Ensure that password guidelines are followed.

### Password Guidelines:

- Passwords should be at least 8 characters long.
- Passwords should contain both upper and lower case alphabetic characters (e.g., a-z, A-Z)
- Passwords should have numeric and special characters (e.g., 0-9, !@#\$%^&\*()\_+|~-=\`{}[]:;'<>?.,/)
- Passwords should not be a word in any language, slang, dialect, jargon or commonly used words
- Passwords should not be based on personal information (birthday, addresses, phone numbers, etc.), names of family members, friends, relations, colleagues or any other information attributable to the user.

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



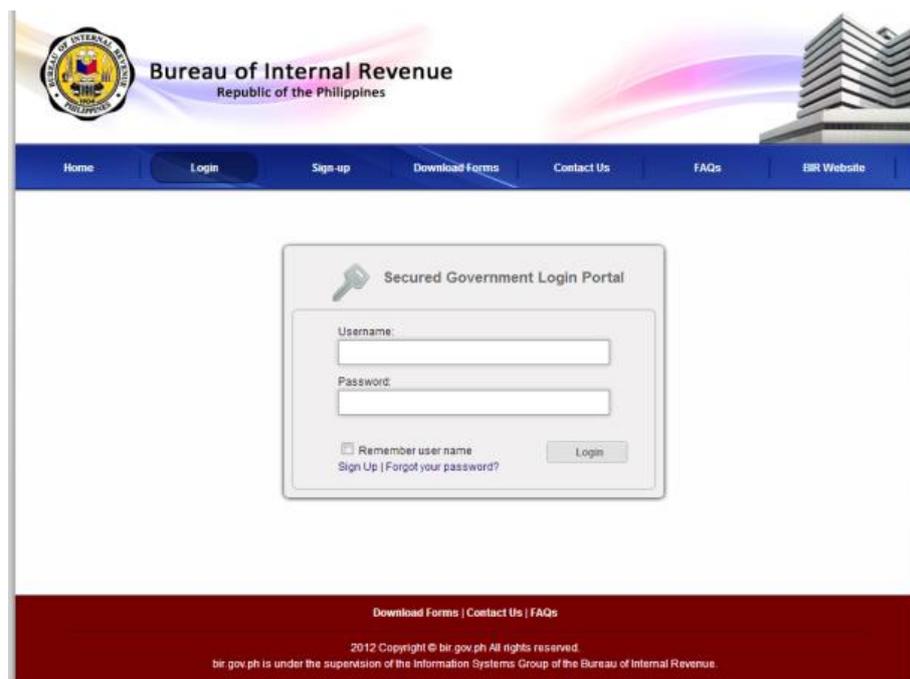
- Passwords should not be computer terms and names, commands, sites, companies, hardware, software.
- Passwords should not be a word or number patterns like aaabbb, qwerty, zyxwvuts, 123321 and so on
- Passwords should not be a word spelled backwards.

### 6.1.2. How to Update User Profile

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



2. Click on the Login tab. Input account username and password.

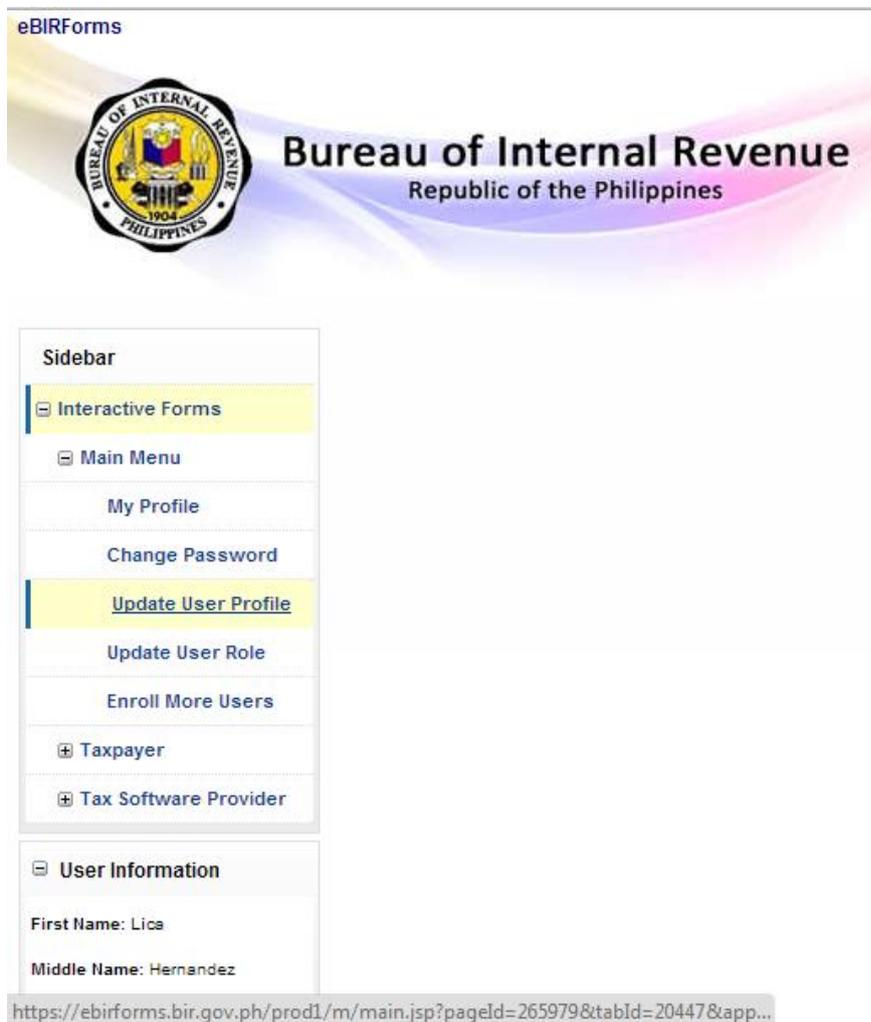




3. User will be redirected to the eBIRForms Home Page.



4. Click on “Update User Profile” under the Sidebar.





5. Update information that needs to be updated. Click “Save”.

The screenshot displays the eBIRFORMS user profile update interface for user Lica Hernandez Soria. The page is titled "Bureau of Internal Revenue" and includes a sidebar with navigation options like "Interactive Forms", "Main Menu", "My Profile", "Change Password", "Update User Profile", "Update User Role", "Error More Users", "Taxpayer", and "Tax Software Provider". The main content area is divided into three sections: "Address Information", "Contact Information", and "Security".

**Address Information:** Fields include Unit / Room Number / Floor (12), Let # / Block # / Phase # / Building #, Building Name (Arce), Street Name (Arce), Barangay Name (Project 5), Subdivision / Village, Province (Iloilo), Municipality/City (Iloilo), and ZIP Code.

**Contact Information:** Fields include Email Address (lga@intracompany.com), Alternate Email Address, Telephone Number (02 2145-5712), and Cellphone Number (0915 2857930).

**Security:** Fields include Challenge Question (What is the name of the street you first lived in?), Answer (Arce), and Confirm Answer.

Buttons for "Save" and "Cancel" are located at the top right and bottom right of the form.

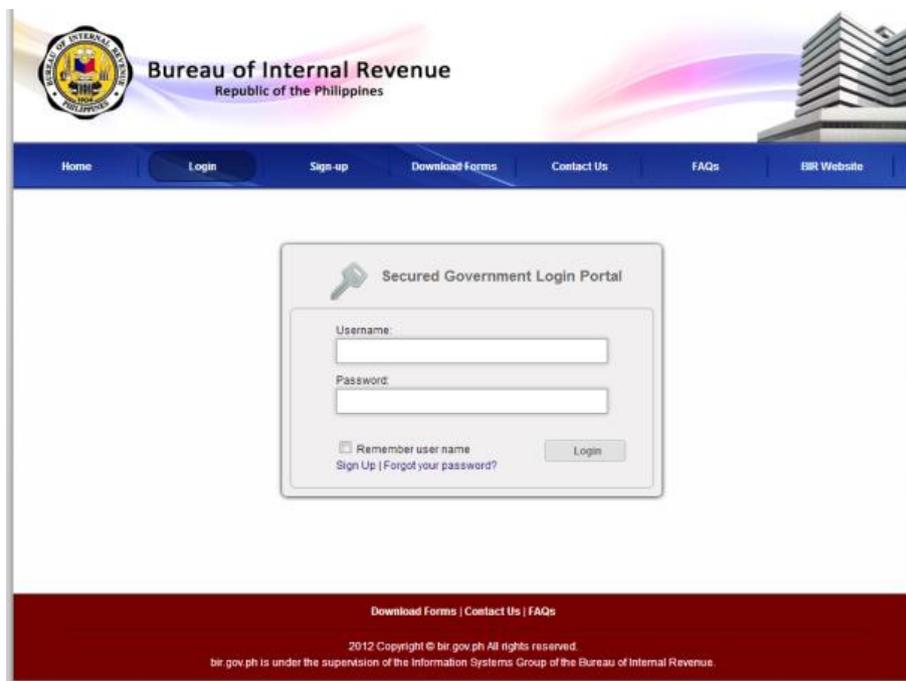


### 6.1.3. How to Change Password

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



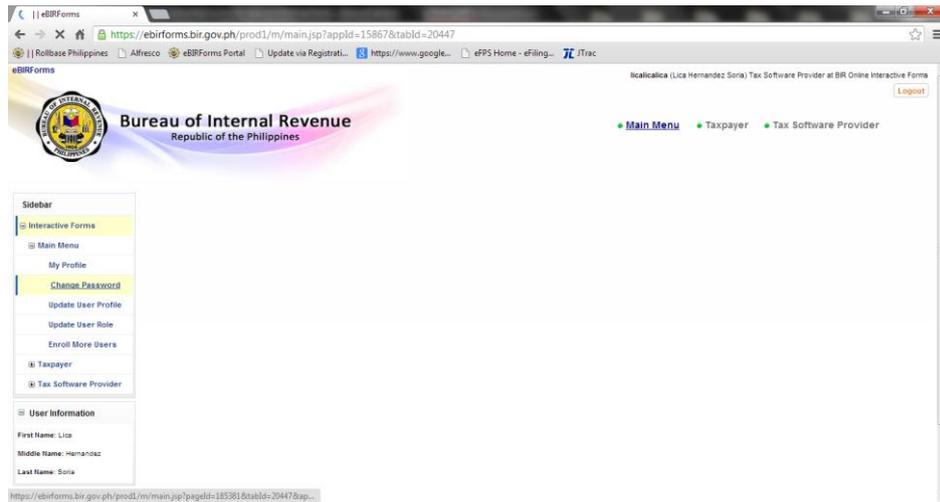
2. Click on the Login tab. Input account username and password.



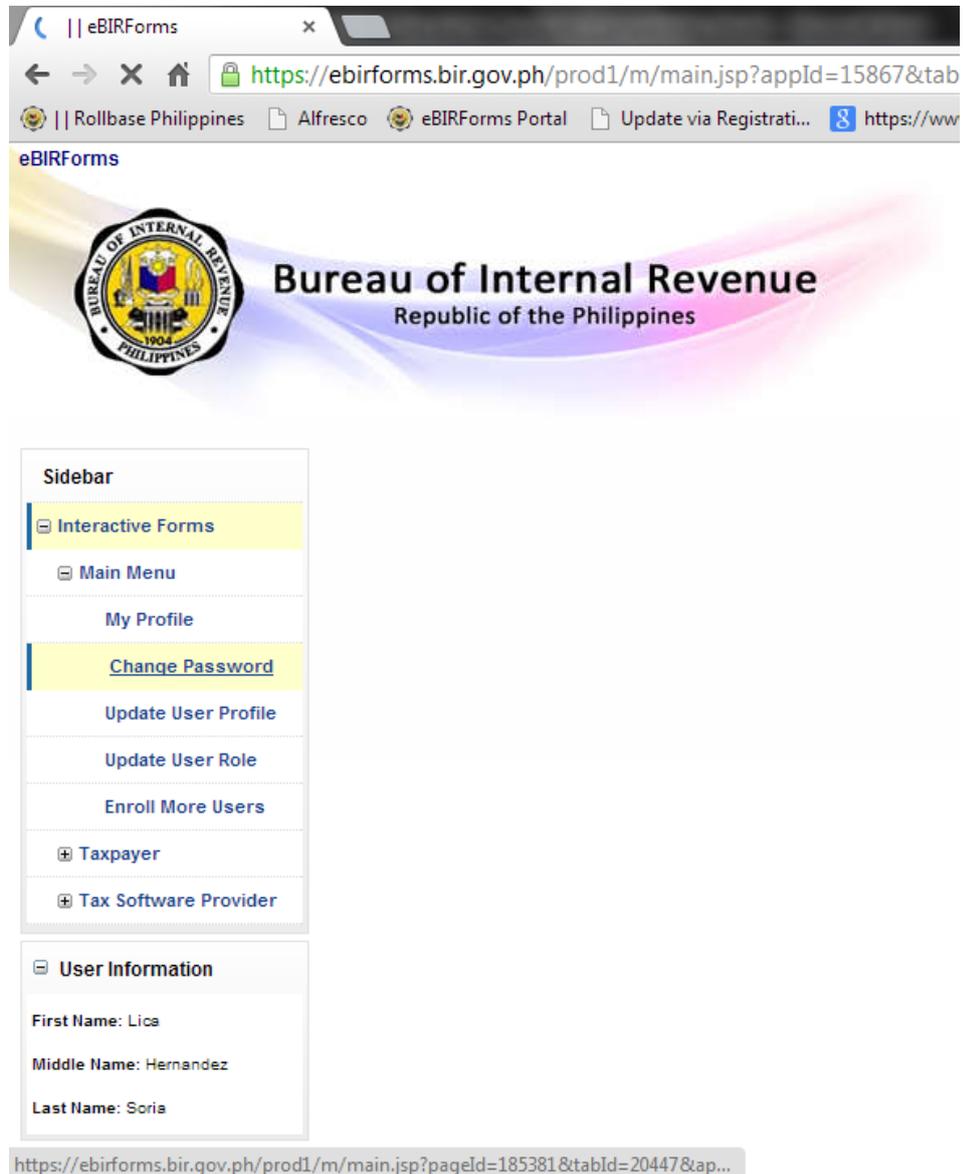
**GUIDE FOR eBIRFORMS**  
Job Aid for Taxpayers and Accredited Tax Agents



3. User will be redirected to the eBIRForms Home Page.



4. Click on “Change Password” under the Sidebar.



# GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



5. Input current password and new password. Click "Save".

icalicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at BIR Online Interactive Forms [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

**Change Password** [Save](#) [Cancel](#)

Password \* - Required

**Current Password**

**New Password**

**Verify New Password**

**Password Requirements**  
Passwords must be at least 8 characters long.  
Passwords must include at least 1 numeric or special character.  
Passwords are case-sensitive

[Save](#) [Cancel](#)

**Sidebar**

- Interactive Forms
- Main Menu
  - My Profile
  - Change Password
  - Update User Profile
  - Update User Role
  - Enroll More Users
- Taxpayer
- Tax Agent
- Tax Software Provider

**Notifications**

This is a sample notification!



### 6.1.4. How to Update User Role

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



2. Click on the Login tab. Input account username and password.



3. User will be redirected to the eBIRForms Home Page.

# GUIDE FOR eBIRFORMS

## Job Aid for Taxpayers and Accredited Tax Agents



4. Click on “Update User Role” under the Sidebar.



## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the applicable check box. If user is registering as a Tax Agent, user must have the correct Tax Agent Accreditation Number. Click "Save".

A screenshot of the Bureau of Internal Revenue (BIR) online interactive forms interface. The page header includes the BIR logo and the text 'Bureau of Internal Revenue Republic of the Philippines'. The user is identified as 'Lica Hernandez Soria'. The main content area is titled 'Please choose your User Classification if applicable.' and contains two radio button options: 'TAX AGENT' (which is selected) and 'TAX SOFTWARE PROVIDER'. Below the 'TAX AGENT' option, there is a text input field for 'GPP/Company (if applicable)' and a text input field for 'Accreditation Number' containing the value '1234567890'. The page includes a sidebar with navigation links such as 'Main Menu', 'My Profile', 'Change Password', 'Update User Profile', 'Update User Role', 'Enroll More Users', 'Taxpayer', 'Tax Agent', and 'Tax Software Provider'. There are 'Save' and 'Cancel' buttons at the bottom right of the form area.

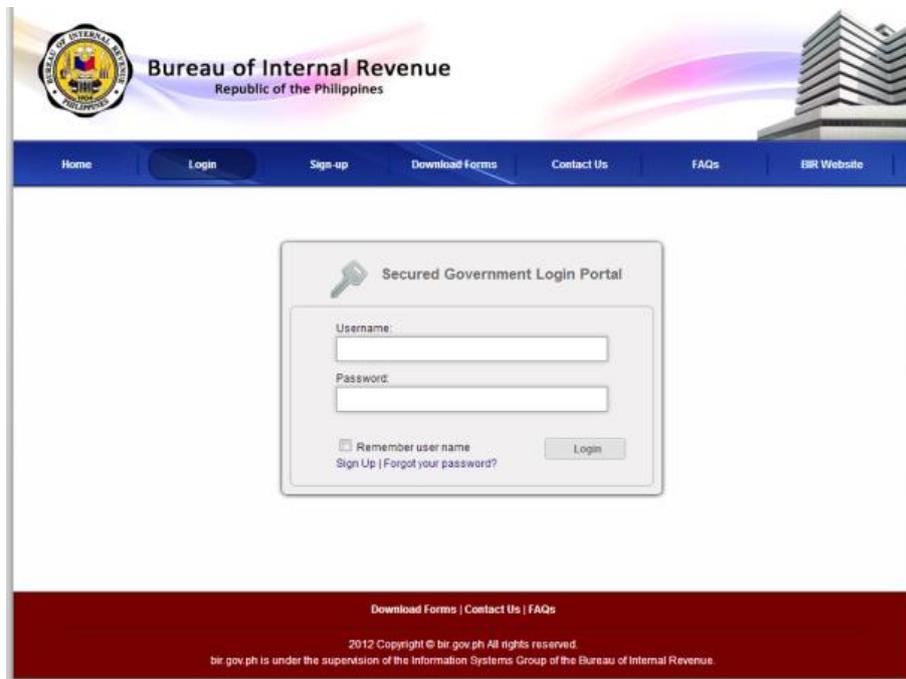


### 6.1.5. How to Enroll More Users

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



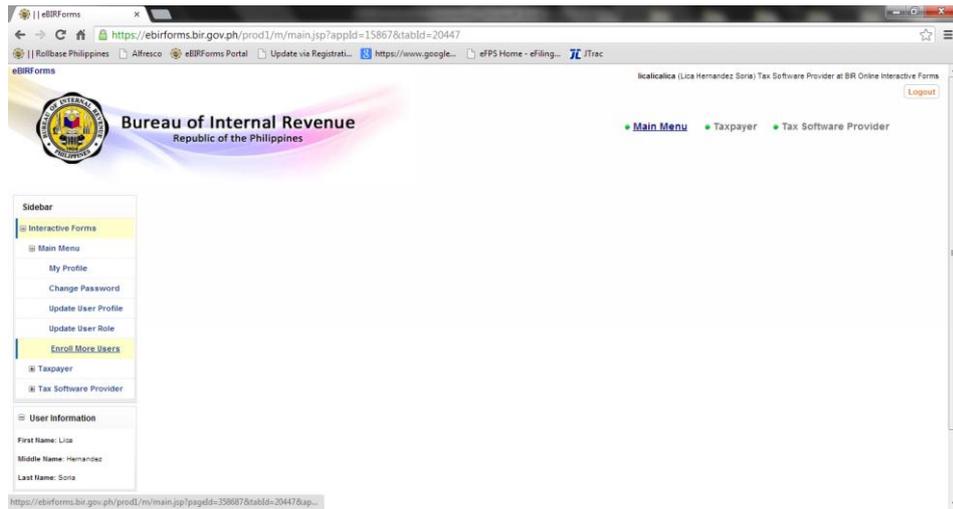
2. Click on the Login tab. Input account username and password.



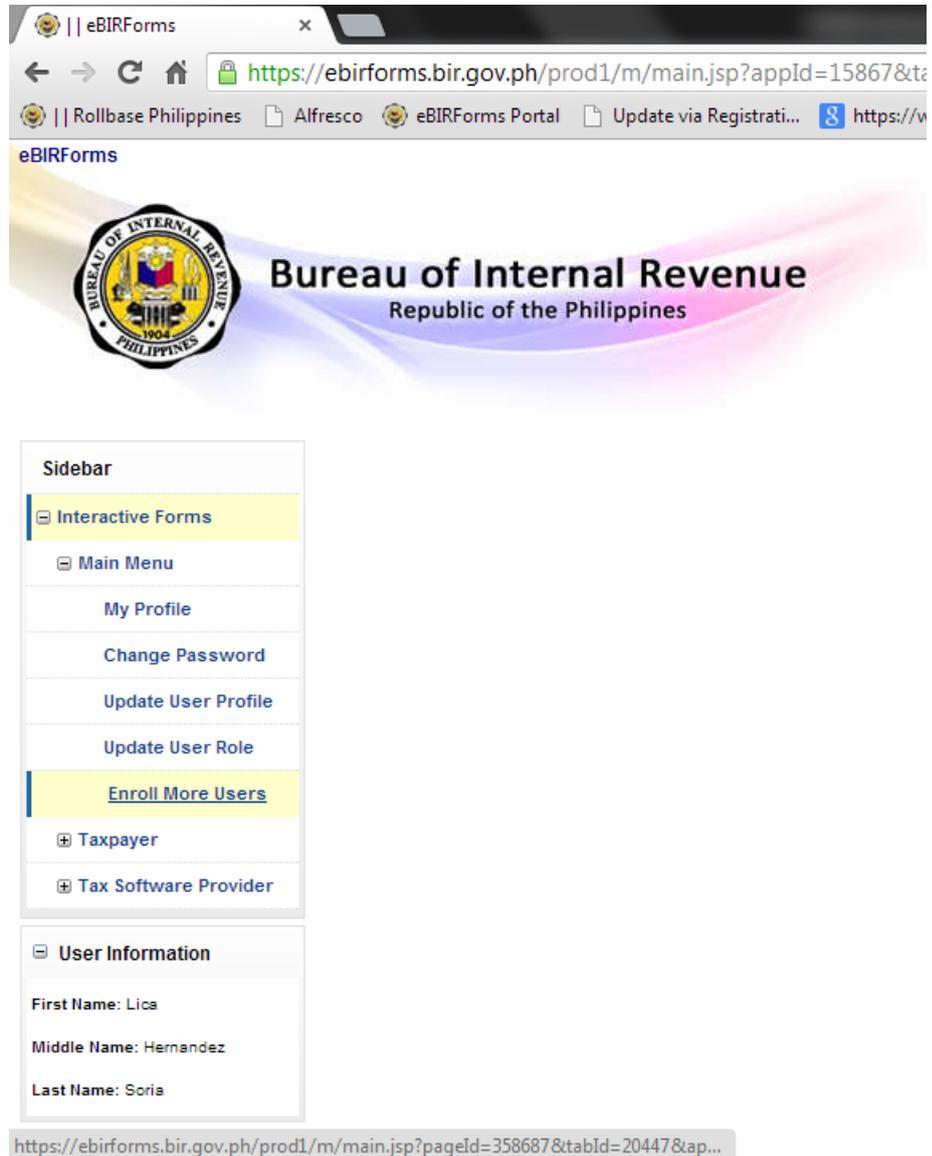
**GUIDE FOR eBIRFORMS**  
Job Aid for Taxpayers and Accredited Tax Agents



3. User will be redirected to the eBIRForms Home Page.



4. Click on “Enroll More Users” under the Sidebar.



## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



5. Input required information. Click "Save".

A screenshot of the eBIRFORMS web application interface. The browser address bar shows the URL: https://ebiforms.bir.gov.ph/prod1/m/main.jsp?pageld=62508&tabId=20447&appld=15867. The page header includes the BIR logo and the text 'Bureau of Internal Revenue Republic of the Philippines'. A user profile 'Icalicalica (Lisa Hernandez Soris) Tax Agent & Tax Software Provider' is visible in the top right, along with a 'Logout' button. A navigation menu includes 'Main Menu', 'Taxpayer', 'Tax Agent', and 'Tax Software Provider'. A sidebar on the left lists various user management options, with 'Enroll More Users' highlighted. The main content area is titled 'Enroll More Users' and contains a form with the following fields: 'Login Name' (text input), 'Email Address' (text input), 'Challenge Question' (dropdown menu with '- Please select -'), 'Answer' (text input), and 'Confirm Answer' (text input). A 'Save' button is located at the top right of the form area.

6. After submission user will be directed to an instruction screen on what to do next to be able to activate his/her account.
7. Go to RDO Office and present all needed documents to Responsible Person.
8. Once approved, a notification e-mail will be sent to the enrolled user. The e-mail will contain the account username and password.

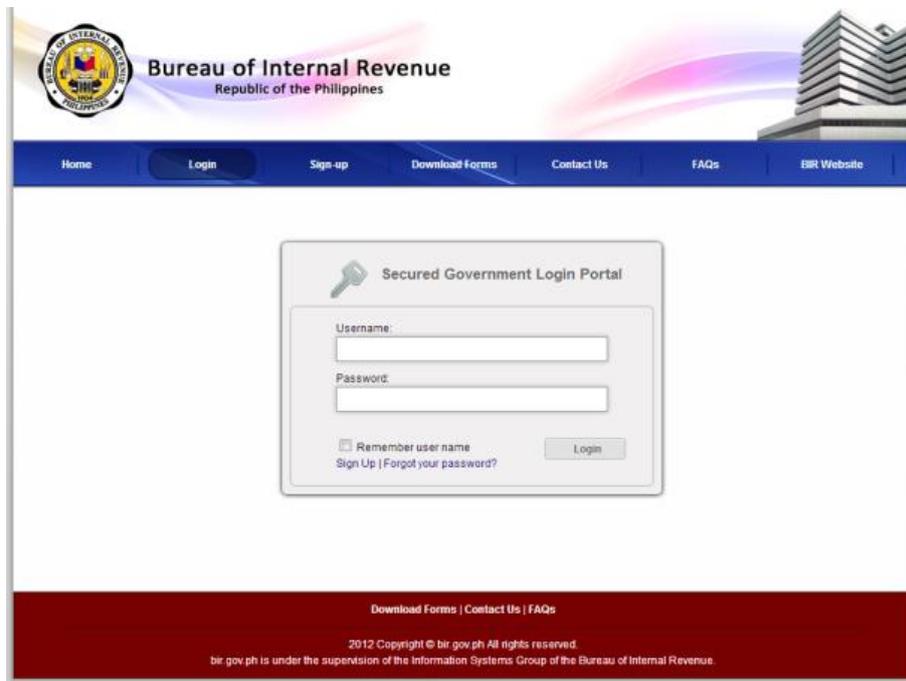


### 6.1.6. How to Deactivate Enrolled Users

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



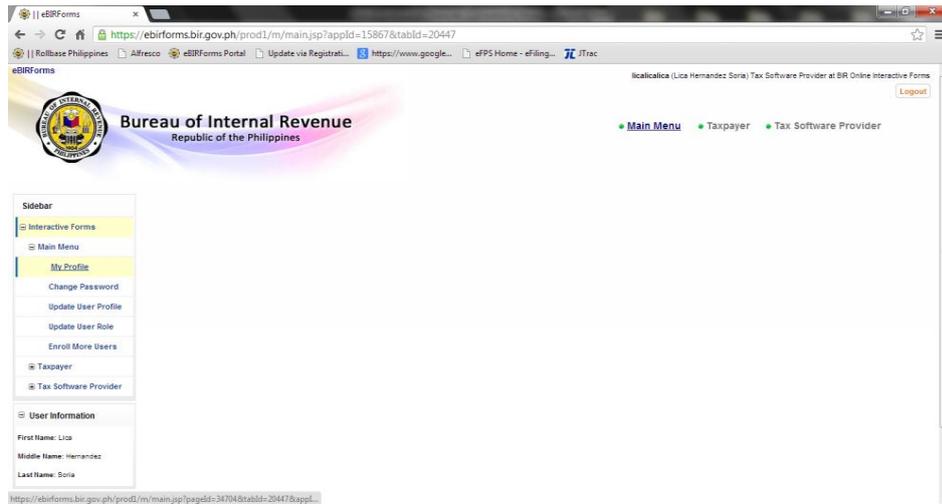
2. Click on the Login tab. Input account username and password.



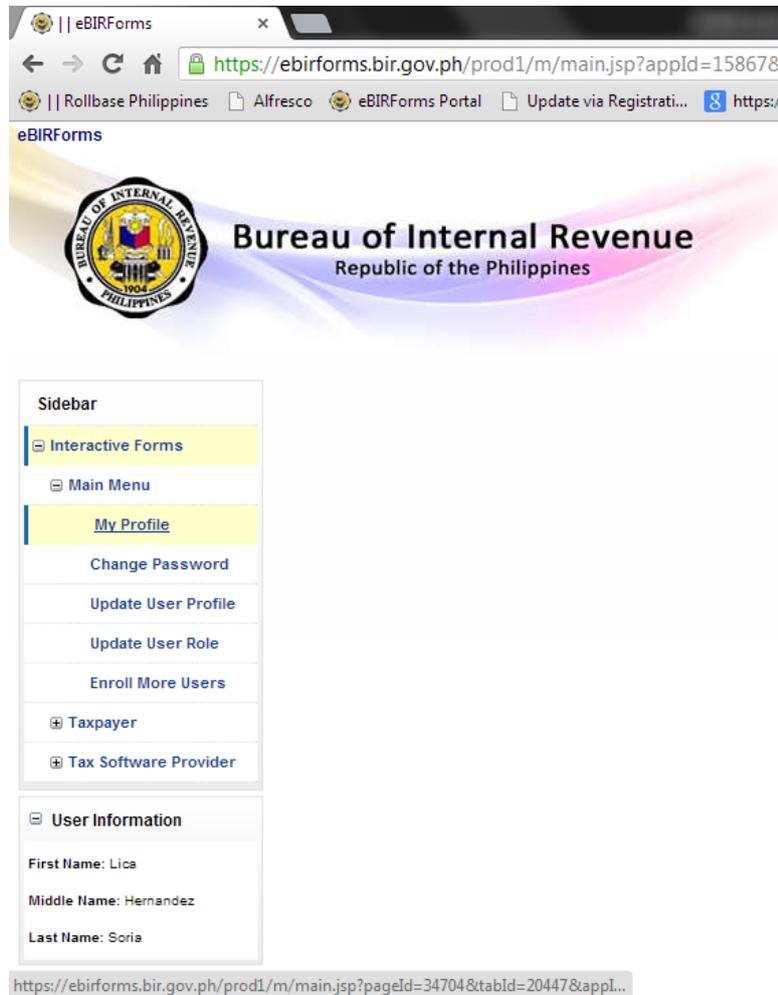
**GUIDE FOR eBIRFORMS**  
Job Aid for Taxpayers and Accredited Tax Agents



3. User will be redirected to the eBIRForms Home Page.



4. Click on “My Profile” under the Sidebar.



# GUIDE FOR eBIRFORMS

## Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the “Users Enrolled” tab.

The screenshot shows the eBIRFORMS interface for user Lica Hernandez Soria. The top header includes the Bureau of Internal Revenue logo and the text "Bureau of Internal Revenue Republic of the Philippines". The user's name "User: Lica Hernandez Soria" is displayed. Below this, there are tabs for "User Info", "Users Enrolled", and "My Valid Form Types". The "Users Enrolled" tab is active, showing a table of active users. The table has columns for "Tag as Inactive", "User Name", "Last Login Time", "Email Address", and "Updated At". Two users are listed: "maysoria" and "user101". The "Tag as Inactive" link is highlighted for the first user. Below the table, there is a section for "All Inactive Users" which shows "Inactive Users None" and "No records to display".

Tag as Inactive	User Name	Last Login Time	Email Address	Updated At
<a href="#">Tag as Inactive</a>	maysoria	12/03/2012 11:29 AM	maasoria@mdracompany.com	01/02/2013 06:03 PM
<a href="#">Tag as Inactive</a>	user101		maasoria@mdracompany.com	01/02/2013 06:03 PM

6. Click the “Tag as Inactive” link opposite the user name of the user you wish to deactivate.

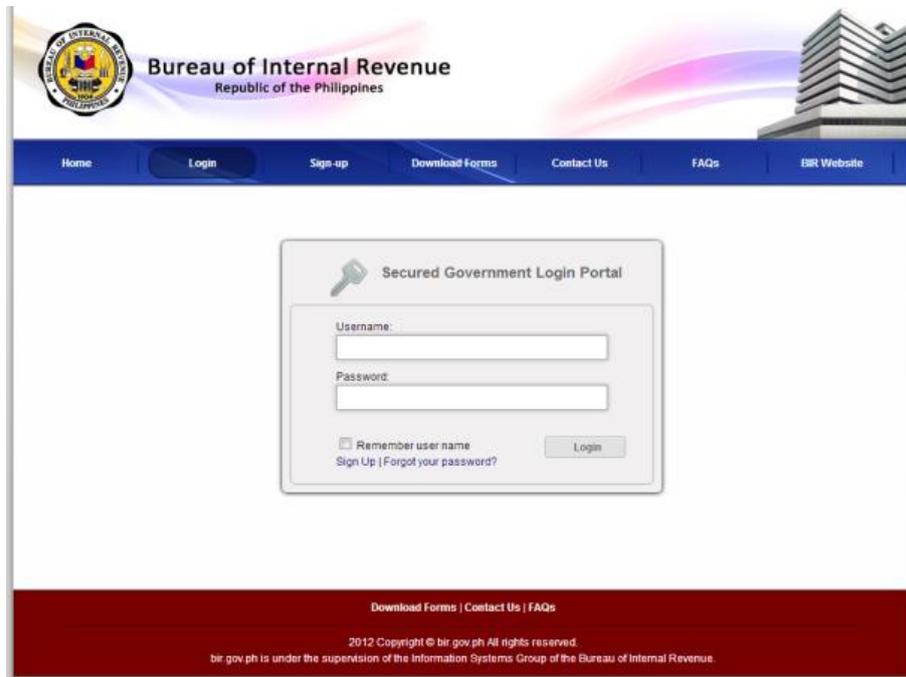


### 6.1.7. How to View Page of Valid Form Types

1. Go to the eBIRForms website (<https://ebirforms.bir.gov.ph>).



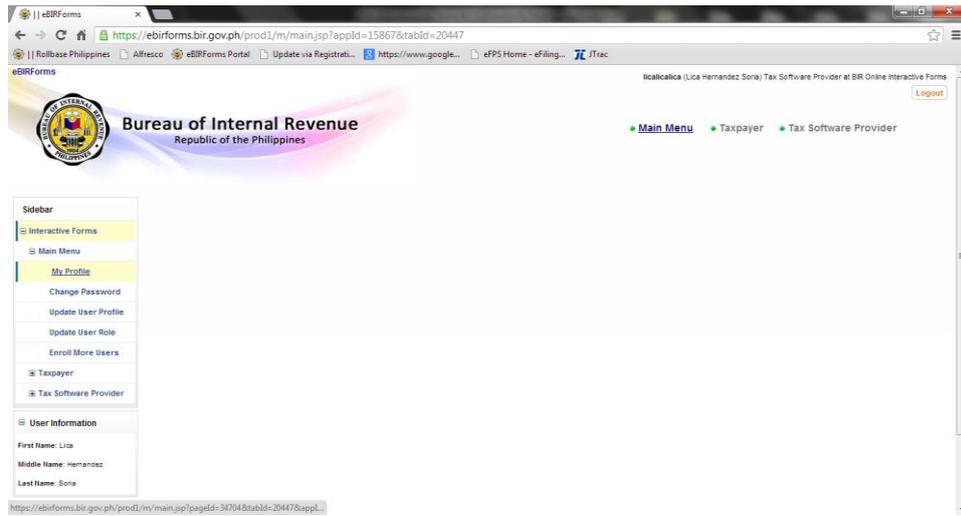
2. Click on the Login tab. Input account username and password.



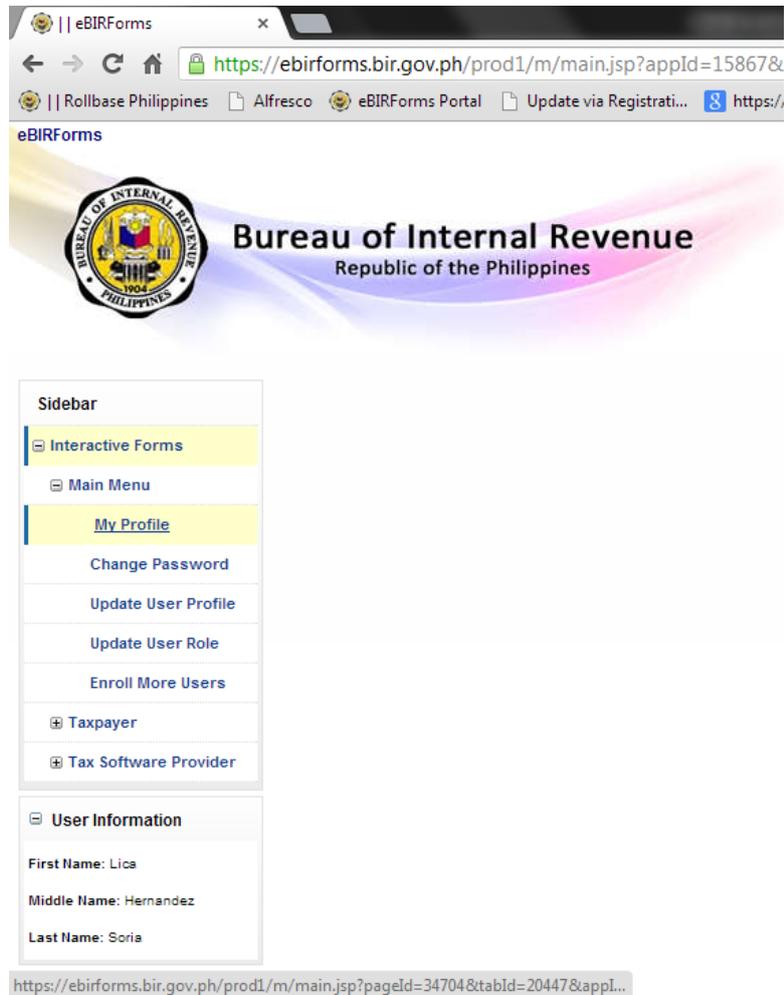
**GUIDE FOR eBIRFORMS**  
Job Aid for Taxpayers and Accredited Tax Agents



3. User will be redirected to the eBIRForms Home Page.



4. Click on “My Profile” under the Sidebar.



# GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the “My Valid Form Types” tab.

The screenshot shows the user interface for the Bureau of Internal Revenue (BIR) eBIRFORMS system. At the top, the BIR logo and name are displayed, along with the text "Bureau of Internal Revenue Republic of the Philippines". To the right, there is a navigation menu with links for "Main Menu", "Taxpayer", "Tax Agent", and "Tax Software Provider". Below the header, the user's name "User: Lica Hernandez Soria" is shown. The main content area is divided into three tabs: "User Info", "Users Enrolled", and "My Valid Form Types". The "My Valid Form Types" tab is currently selected and displays a table of form numbers and their corresponding dates.

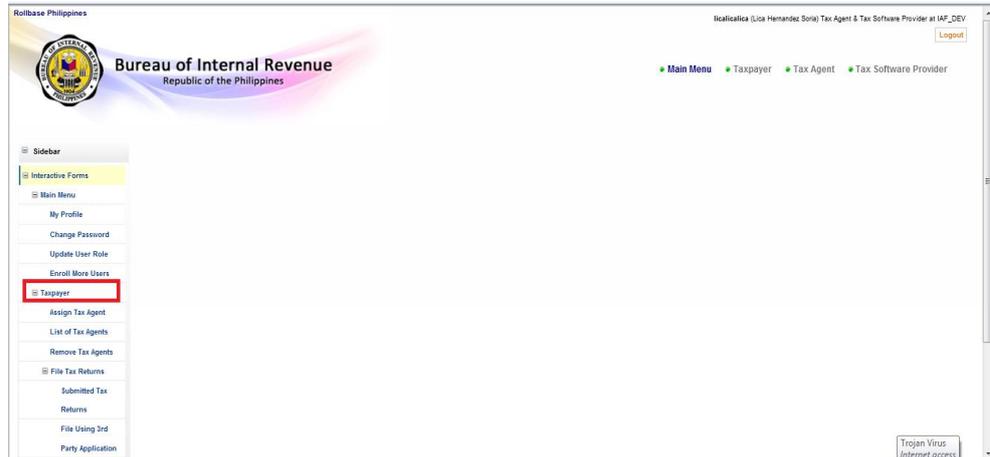
Form No.
0605-Sep2003
1600-Sep2005
1600WP-Jan2010
1601C-Jul2008
1601E-Sep2007
1601F-Sep2005
1602-Aug2001
1603-Nov2004
1604CF-Jul2008
1604E-Jul1999
1606-Jul1999
1701Q-Jul2008



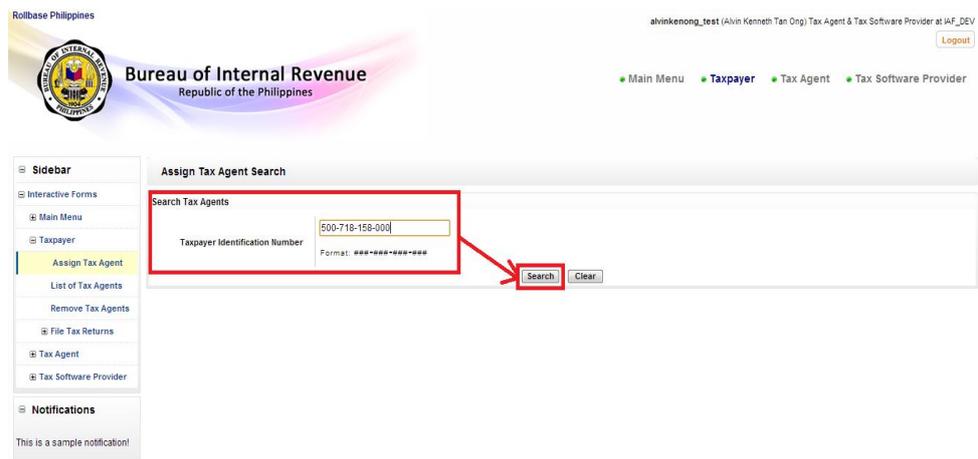
## 6.2. Filing

### 6.2.1. How to Assign Tax Agent

1. Click TAXPAYER Main Menu Link to show sub-modules under it.
2. Click on ASSIGN TAX AGENT link to access Assign Tax Agent Main Screen.



3. Enter TIN of Tax Agent you want to assign.
4. Click on SEARCH button, system should return Tax Agent with TIN associated to the one entered.





- Click on the **ASSIGN TAX AGENT** button to assign record as your Tax Agent. System should show confirmation page once button is clicked.

Rollbase Philippines alvinkenong\_test (Alvin Kenneth Tan Ong) Tax Agent & Tax Software Provider at iAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

Main Menu Taxpayer Tax Agent Tax Software Provider

**Sidebar**

- Interactive Forms
- Main Menu
- Taxpayer
  - Assign Tax Agent
  - List of Tax Agents
  - Remove Tax Agents
- File Tax Returns
- Tax Agent
- Tax Software Provider

**Notifications**

This is a sample notification!

**Search**

Search Tax Agents

Taxpayer Identification Number  Format: #####-####

Search Clear

**Search Results**

Search Results

All Available Tax Agents 1-1 of 1

Search for: Taxpayer Identification Number equals 500-718-158-000

User Name	First Name	Middle Name	Last Name	Taxpayer Identification Number	
<a href="#">Assign Tax Agent</a>	Rex Paul TA1 Recoter	Rex Paul	TA1	Recoter	500-718-158-000

- Click on the **SAVE** button to confirm action.

Rollbase Philippines alvinkenong\_test (Alvin Kenneth Tan Ong) Tax Agent & Tax Software Provider at iAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

Main Menu Taxpayer Tax Agent Tax Software Provider

**Sidebar**

- Interactive Forms
- Main Menu
- Taxpayer
  - Assign Tax Agent
  - List of Tax Agents
  - Remove Tax Agents
- File Tax Returns
- Tax Agent
- Tax Software Provider

**Notifications**

This is a sample notification!

**New Request** Save Cancel

Assignment Information \* Required

Tax Agent Rex Paul TA1 Recoter

**Save** Cancel

- Once **SAVE** button is clicked, system will go back to Results page and display a message saying that request has been created. System will also send an email to the chosen Tax Agent to inform them of taxpayer's request for association.

**Note:** If Tax Agent does not confirm association within 10 days, system will cancel request and deny the association.

Rollbase Philippines alvinkenong\_test (Alvin Kenneth Tan Ong) Tax Agent & Tax Software Provider at iAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

Main Menu Taxpayer Tax Agent Tax Software Provider

**Sidebar**

- Interactive Forms
- Main Menu
- Taxpayer
  - Assign Tax Agent
  - List of Tax Agents
  - Remove Tax Agents
- File Tax Returns
- Tax Agent
- Tax Software Provider

**Notifications**

This is a sample notification!

**Search**

Search Tax Agents

Taxpayer Identification Number  Format: #####-####

Search Clear

**Search Results**

Search Results

All Available Tax Agents 1-1 of 1

Search for: Taxpayer Identification Number equals 500-718-158-000

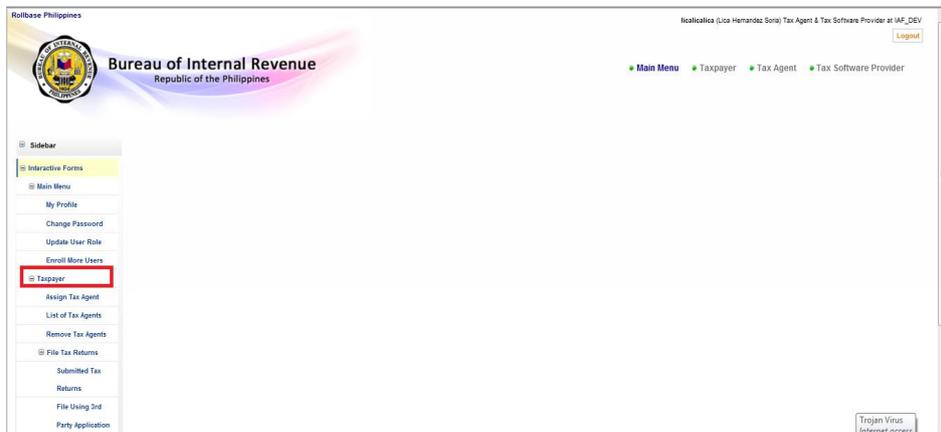
User Name	First Name	Middle Name	Last Name	Taxpayer Identification Number	
	Rex Paul TA1 Recoter	Rex Paul	TA1	Recoter	500-718-158-000

Request "[12/15/2012 03:00 PM] - Alvin Kenneth Tan Ong" has been created.

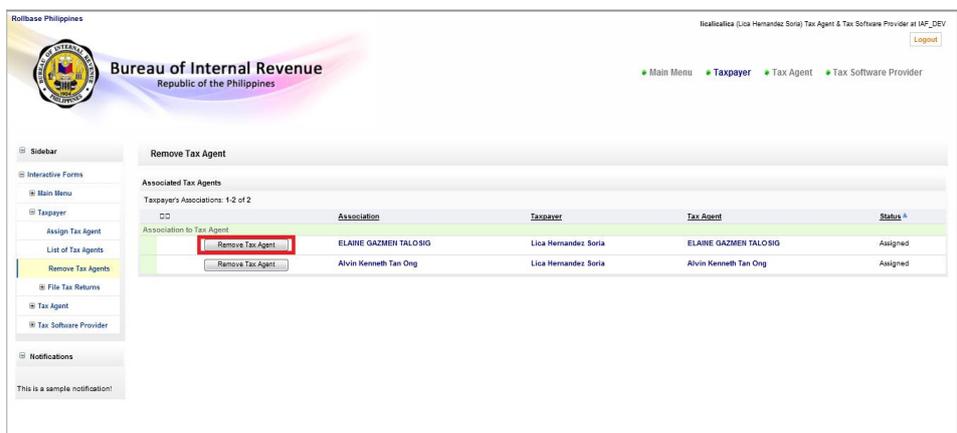


## 6.2.2. How to Remove Tax Agent

1. Click **TAXPAYER** Main Menu Link to show sub-modules under it.
2. Click on **REMOVE TAX AGENT** link to access sub-modules Main Screen.



3. Click on **REMOVE TAX AGENT** button to start process of disassociation.
4. When **REMOVE TAX AGENT** button is clicked, system will display confirmation page.



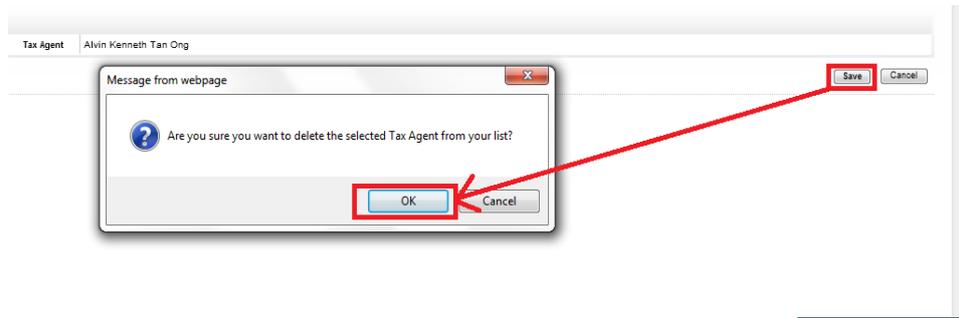
5. Click on **SAVE** button to confirm disassociation to chosen Tax Agent.

## GUIDE FOR eBIRFORMS

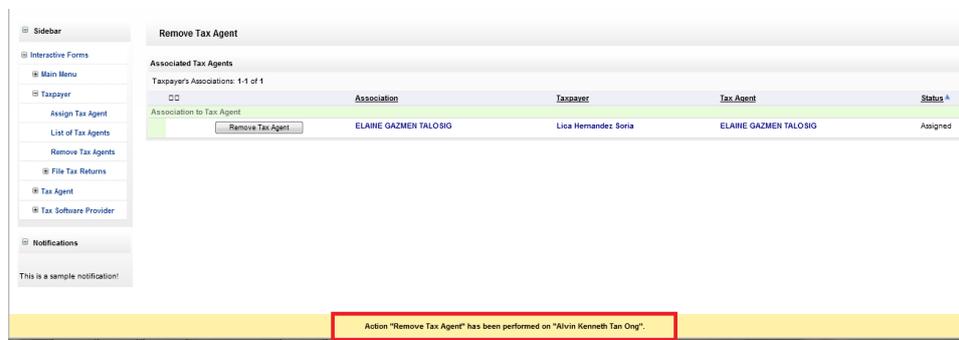
### Job Aid for Taxpayers and Accredited Tax Agents



- System should open a new dialogue asking if user is sure of chosen action, if user clicks the **OK** button system will go back to **REMOVE TAX AGENT** main screen and display a message. (See next slide for message).



- Message: Action "Remove Tax Agent" has been performed on "Name of Tax Agent"



- Email will be sent to Tax Agent informing them that taxpayer has chosen to sever their association to each other.

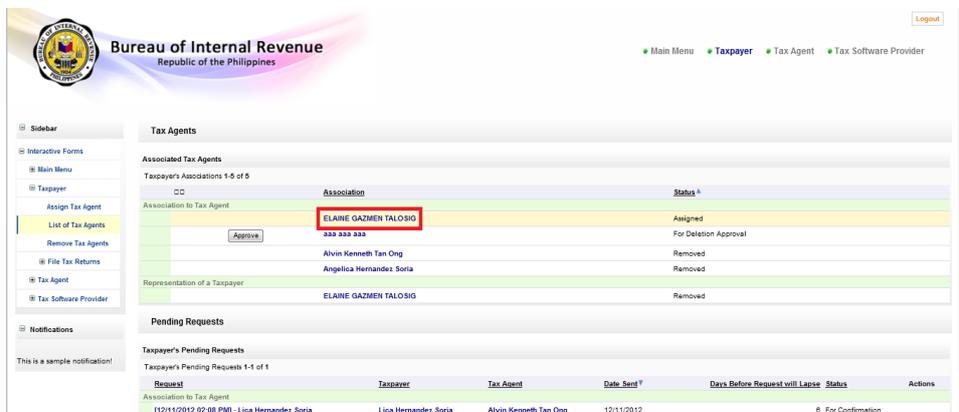


### 6.2.3. How to Allow Tax Agent Permission on BIR Forms

1. Click **TAXPAYER** Main Menu Link to show sub-modules under it.
2. Click on **LIST OF TAX AGENTS** link to access sub-modules Main Screen.



3. System will show all Tax Agents associated to taxpayer on main page along with the status of the association.
4. To assign a particular form to a Tax Agent, click on the name of the Tax Agent to display screen allowing Tax Agent access to BIR Forms the taxpayer is registered to in ITS.



5. Click on the **EDIT** icon to enable assigning of BIR Forms to the chosen Tax Agent.

# GUIDE FOR eBIRFORMS

## Job Aid for Taxpayers and Accredited Tax Agents



6. Choose forms you wish to allow Tax Agent to file for you.

Rollbase Philippines

Bureau of Internal Revenue  
Republic of the Philippines

Association: ELAINE GAZMEN TALOSIG

Status Assigned  
Date of Representation 12/11/2012

Assignment Information  
Tax Agent Inquiry ELAINE GAZMEN TALOSIG  
Tax Agent TIN 305-679-758-000

List Of Assigned Forms

- 0005-Sep2003
- 1800-Sep2005
- 1800WP-Jan2010
- 1851C-Jul2008

7. Click on **SAVE** button to confirm choices.

---

- 2000OT-Jun2006
- 2200A-May2006
- 2200AN-Oct2002
- 2200M-Oct2002
- 2200P-Sep2005
- 2200T-May2006
- 2550M-Feb2007
- 2550Q-Feb2007
- 2551M-Sep2005
- 2551Q-Feb2002
- 2552-Jul1998
- 2553-Jul1999

---

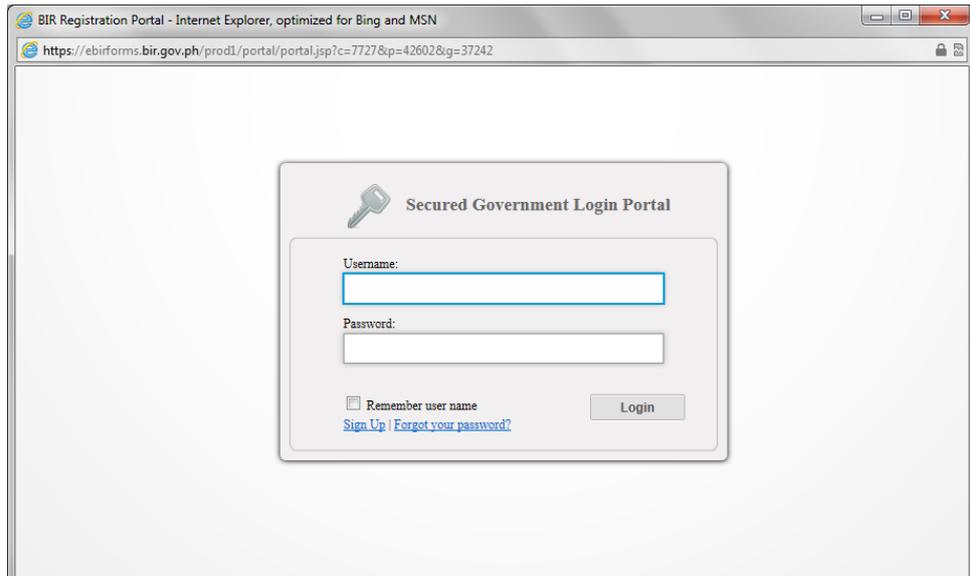


### 6.2.4. How to File Offline to Online

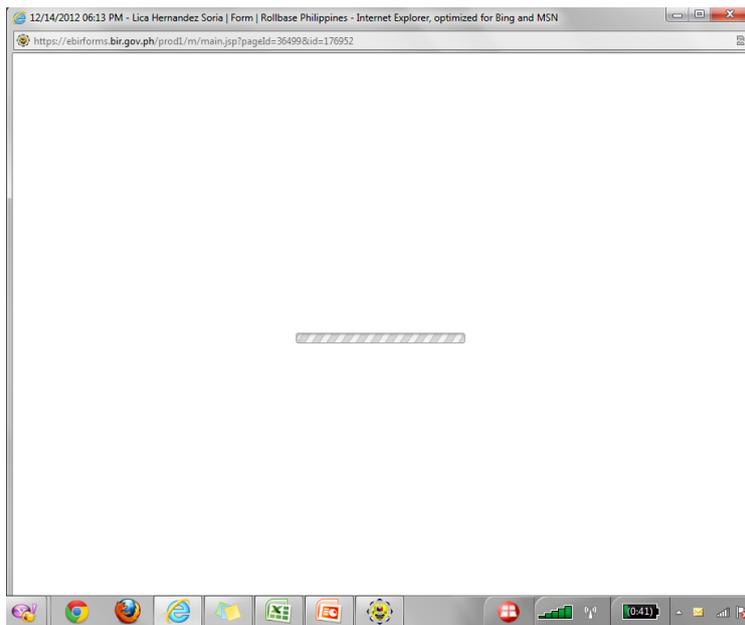
1. Select and fill up offline form.
2. Click **VALIDATE** button.

3. An alert message will be prompted saying that validation is successful.
4. Click **OK** button.

5. Click **SUBMIT** button.
6. You will be directed to the Log-in page of the system.



7. Enter username and password.
8. Click **LOG-IN** button.
9. System will validate form being submitted to the system.



10. System will direct you to form screen upon successful validation.
11. Click **CONTINUE** button to go the FRN page.

# GUIDE FOR eBIRFORMS

## Job Aid for Taxpayers and Accredited Tax Agents



Rollbase Philippines licalcalca (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

[Main Menu](#)   [Taxpayer](#)   [Tax Agent](#)   [Tax Software Provider](#)

Form: 12/14/2012 06:13 PM - Lica Hernandez Soria [Continue](#)

**Return Form Information**

Form Type	0605-Sep2003	Print Preview	<a href="#">Print Preview</a>
Taxpayer	Lica Hernandez Soria	Filing Date	12/14/2012 06:13 PM
FRN (Filing Reference Number)	12-12-01-01-001174-006-1		

This form has been successfully filed.

**Preview**  
Validation successful.

**Payment Form** BIR Form No. 0605

September 2003(ENCS)

1 For the Calendar Fiscal	3 Quarter 1st 2nd 3rd 4th	4 Due Date (MM/DD/YYYY) 04 04 2012	5 No. of Sheets Attached 0	6 A/T/C FP010
2 Year Ended (MM/YYYY) 12 - December 2012				

This is a sample notification!

12. System will display FRN page.

13. Click **PRINT** button to print FRN page. Click **CANCEL** button to go back to the form screen.

Rollbase Philippines licalcalca (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

[Main Menu](#)   [Taxpayer](#)   [Tax Agent](#)   [Tax Software Provider](#)

Republic of the Philippines  
 Department of Finance  
**BUREAU OF INTERNAL REVENUE**

**FILING REFERENCE NO.** Form No. 0605-Sep2003

Filing Reference Number	12-12-01-01-001174-006-1
TIN	456-789-123-000
RDO	005
Return Period	
Tax Due	100,000
Penalty	0
Total Amount Payable	100,000

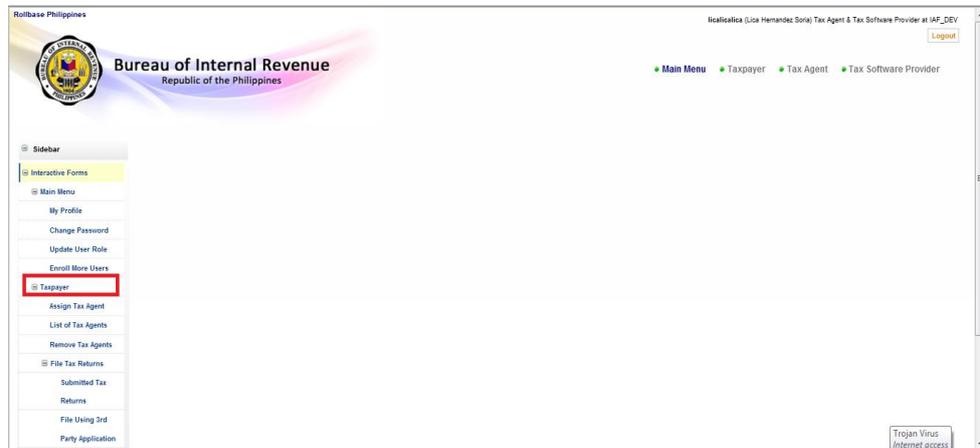
[Print](#)   [Cancel](#)

This is a sample notification!



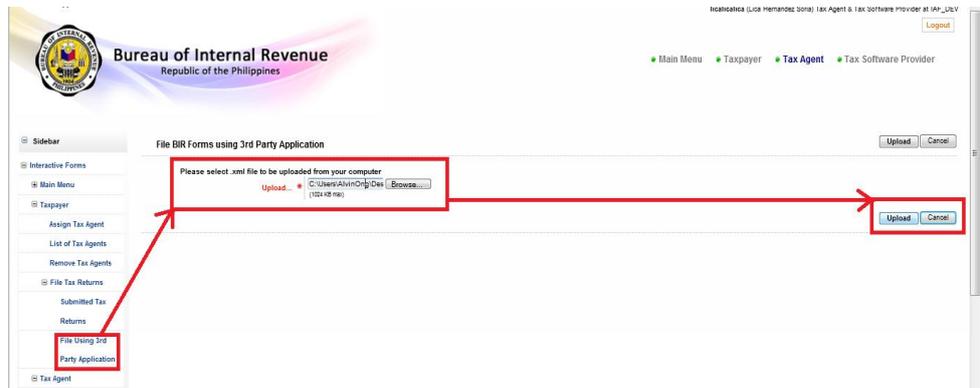
### 6.2.5. How to File BIR form using 3rd Party Application as Taxpayer

1. Click **TAXPAYER** Main Menu Link to show sub-modules under it.
2. Click on **FILE TAX RETURNS** link to access sub-modules under it.



3. Click on **FILE USING 3<sup>RD</sup> PARTY APPLICATION** link to access its screen. System should screen for uploading XML file.
4. Click **BROWSE** to choose XML file to upload into system.
5. Click **SAVE** button to begin uploading process.

**Note:** When XML file is valid, system should display preview of form that was successfully filed (penalties will be incurred if filing was late).



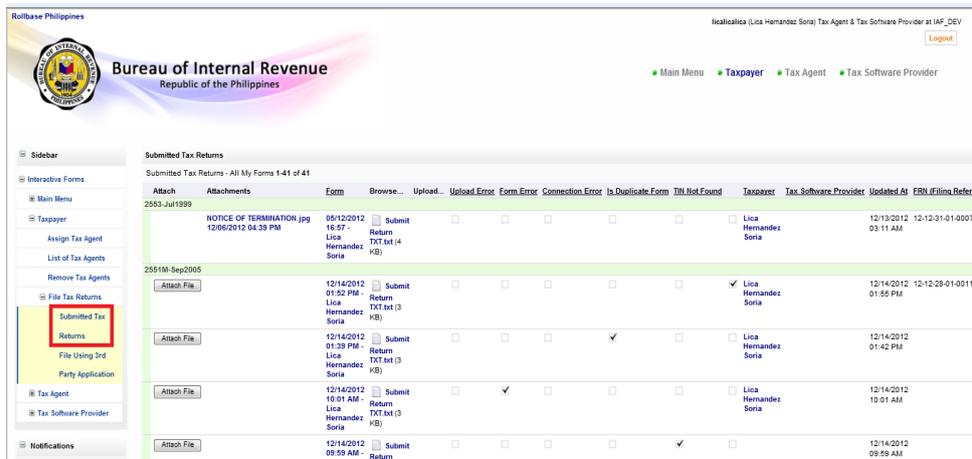


### 6.2.6. How to View Taxpayer History

1. Click **TAXPAYER** Main Menu Link to show sub-modules under it.
2. Click on **FILE TAX RETURNS** link to access sub-modules.



3. Click on **SUBMITTED TAX RETURNS** link to access its screen. System should show all forms filed by the taxpayer or the taxpayer's Tax Agent for the particular TIN associated with the account.





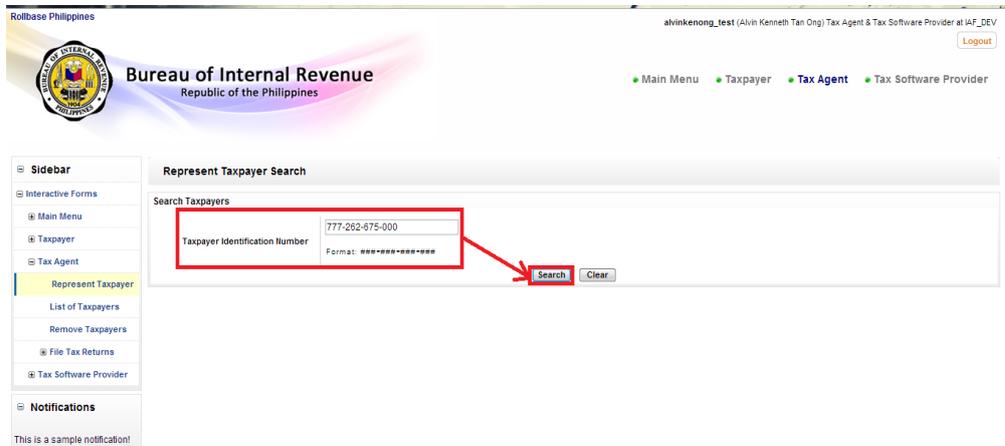
**TAX AGENT**

**6.2.7. How to Represent a Taxpayer**

1. Click **TAX AGENT** Main Menu Link to show sub-modules under it.
2. Click on **REPRESENT TAXPAYER** link to access its screen.



3. Enter TIN of taxpayer you want to represent.
4. Click on **SEARCH** button, system should return taxpayer with TIN associated to the one entered.



## GUIDE FOR eBIRFORMS

### Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the **REPRESENT TAXPAYER** button to request record to be your taxpayer. System should show confirmation page once button is clicked.

The screenshot shows the 'Search Taxpayers' interface. A search bar contains the text 'Taxpayer Identification Number' and a format 'Format: xxx-xxx-xxxx'. Below the search bar, a table displays search results. The first row is highlighted in yellow and contains the following data:

	User Name	First Name	Middle Name	Last Name	Taxpayer Identification Number
<input type="checkbox"/>	Represent Taxpayer	Rosanna TA1 San Vicente	Rosanna	TA1 San Vicente	777-262-675-000

6. Click on the **SAVE** button to confirm action.

The screenshot shows the 'New Request' page. The 'Taxpayer Information' field is populated with 'Taxpayer Rosanna TA1 San Vicente'. A red asterisk indicates a required field. The 'Save' button is highlighted with a red box.

7. Once **SAVE** button is clicked, system will go back to Results page and display message saying that request has been created. System will also send an email to the chosen taxpayer to inform them of Tax Agent's request to represent them.

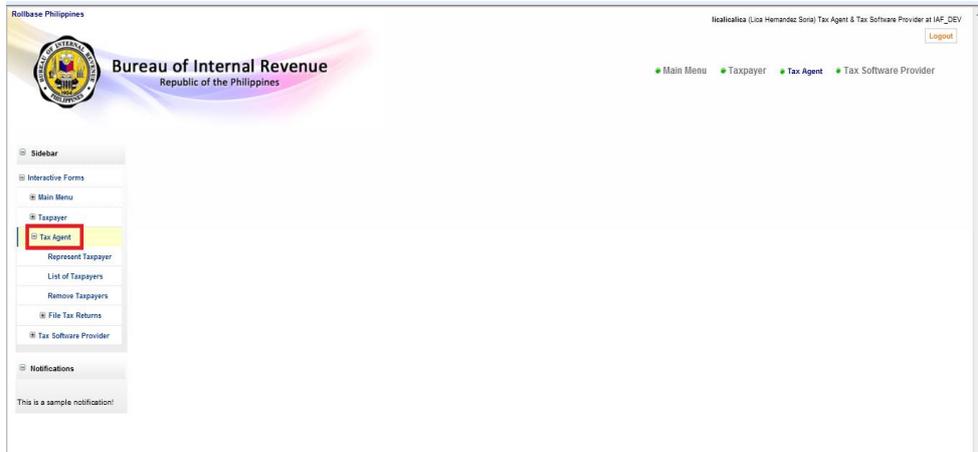
**Note:** If taxpayer does not confirm association within 10 days, system will cancel request and deny the association.

Request "[12/15/2012 03:09 PM] - Lica Hernandez Soria" has been created.

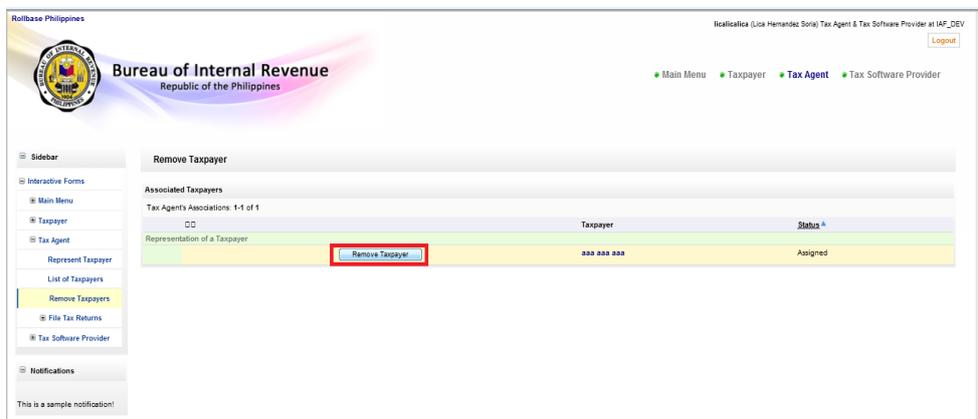


### 6.2.8. How to Remove Taxpayer

1. Click **TAX AGENT** Main Menu Link to show sub-modules under it.
2. Click on **REMOVE TAXPAYERS** link to access its screen.



3. Click on **REMOVE TAXPAYER** button to start process of disassociation.
4. When **REMOVE TAXPAYER** button is clicked, system will display new screen for uploading Notice of Termination.



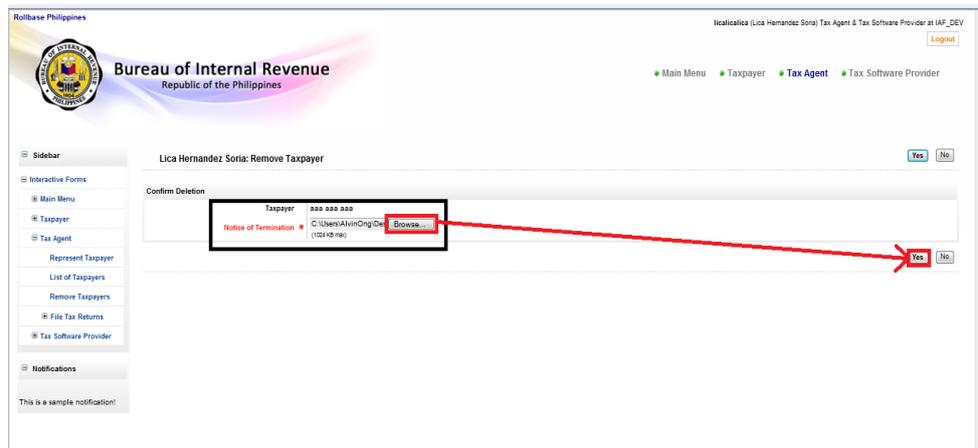
5. Click **BROWSE** to choose for Notice of Termination file to upload into system upload facility.

## GUIDE FOR eBIRFORMS

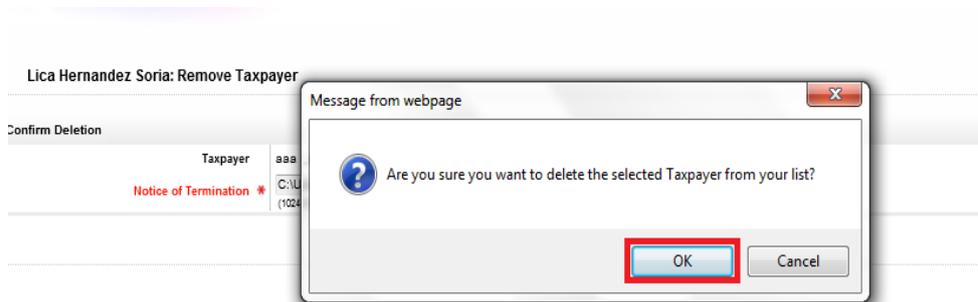
Job Aid for Taxpayers and Accredited Tax Agents



6. Click **YES** button to confirm file to be uploaded.



7. When **YES** button is clicked, system will display new dialogue box asking if you are sure of action.
8. Click **OK** button to confirm. System will go back to **REMOVE TAXPAYER** main screen and display a message saying that request was created. (Message on next slide.)
9. System will send email to taxpayer notifying them that Tax Agent wishes to sever their association.



### Note:

Attached in the email is the Notice of Termination that was uploaded by the Tax Agent in the system.

If taxpayer does not confirm by the 10<sup>th</sup> day of the request, system will not remove association with the Tax Agent.

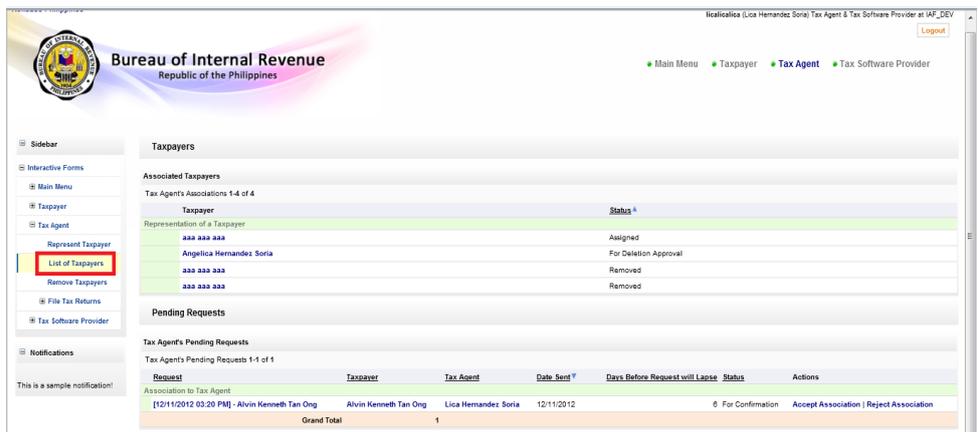


### 6.2.9. How to View List of Taxpayers

1. Click **TAX AGENT** Main Menu Link to show sub-modules under it.
2. Click on **LIST OF TAXPAYERS** link to access sub-modules.



3. System will show all Taxpayers associated to the Tax Agent's account on the main page along with the status of the association.



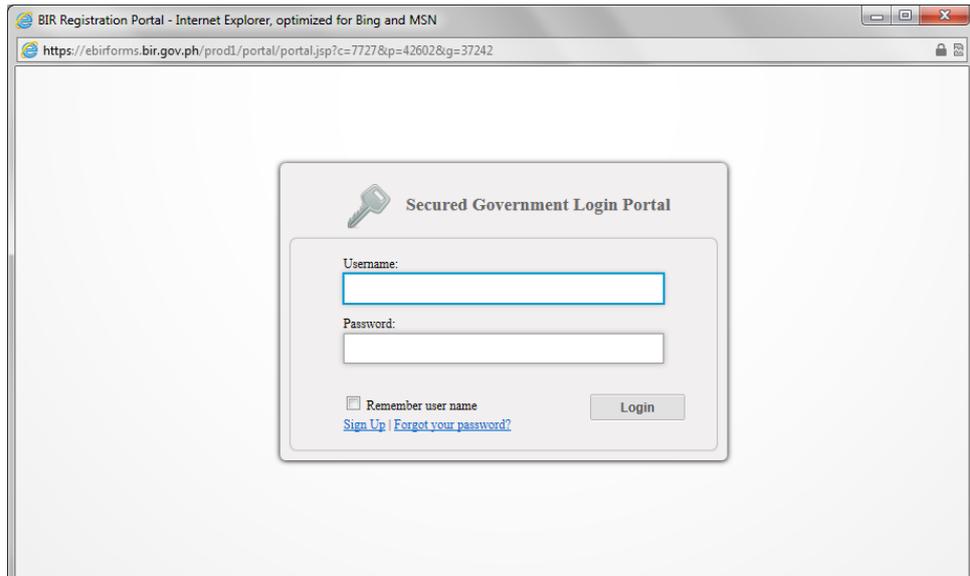


### 6.2.10. How to File Offline to Online for a Taxpayer

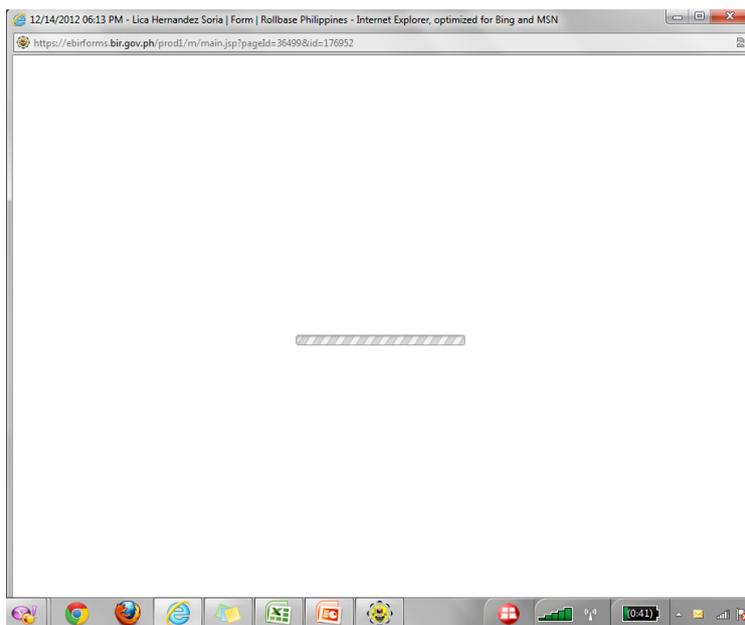
1. Select and fill up offline form.
2. Click **VALIDATE** button.

3. An alert message will be prompted saying that validation is successful.
4. Click **OK** button.

5. Click **SUBMIT** button.
6. You will be directed to the Log-in page of the system.



7. Enter username and password.
8. Click **LOG-IN** button.
9. System will validate form being submitted to the system.



10. System will direct you to form screen upon successful validation.
11. Click **CONTINUE** button to go the FRN page.

# GUIDE FOR eBIRFORMS

## Job Aid for Taxpayers and Accredited Tax Agents



Rollbase Philippines licicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

[Main Menu](#)   [Taxpayer](#)   [Tax Agent](#)   [Tax Software Provider](#)

Form: 12/14/2012 06:13 PM - Lica Hernandez Soria [Continue](#)

**Return Form Information**

Form Type	0605-Sep2003	Print Preview	<a href="#">Print Preview</a>
Taxpayer	Lica Hernandez Soria	Filing Date	12/14/2012 06:13 PM
FRN (Filing Reference Number)	12-12-01-01-001174-006-1		

This form has been successfully filed.

**Preview**  
Validation successful.

**Payment Form** BIR Form No. **0605**

September 2003(ENCS)

1 For the Calendar Fiscal	3 Quarter 1st 2nd 3rd 4th	4 Due Date (MM/DD/YYYY) 04 04 2012	5 No. of Sheets Attached 0	6 A/T/C FP010
2 Year Ended (MM/YYYY) 12 - December 2012				

This is a sample notification!

12. System will display FRN page.

13. Click **PRINT** button to print FRN page. Click **CANCEL** button to go back to the form screen.

Rollbase Philippines licicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF\_DEV [Logout](#)

**Bureau of Internal Revenue**  
Republic of the Philippines

[Main Menu](#)   [Taxpayer](#)   [Tax Agent](#)   [Tax Software Provider](#)

Republic of the Philippines  
 Department of Finance  
**BUREAU OF INTERNAL REVENUE**

**FILING REFERENCE NO.** Form No. 0605-Sep2003

Filing Reference Number	12-12-01-01-001174-006-1
TIN	456-789-123-000
RDO	005
Return Period	
Tax Due	100,000
Penalty	0
Total Amount Payable	100,000

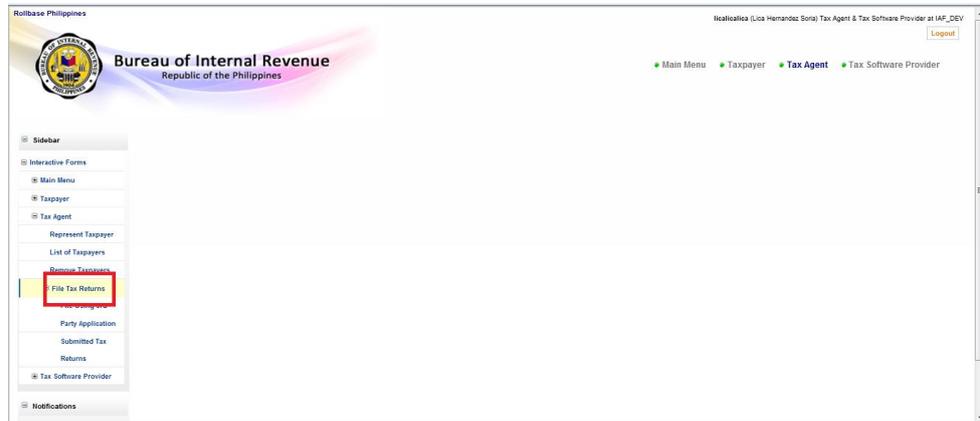
[Print](#)   [Cancel](#)

This is a sample notification!



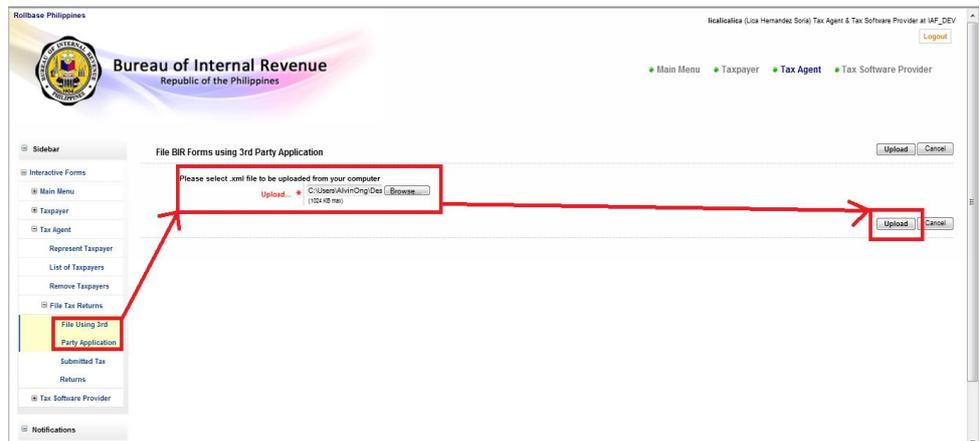
### 6.2.11. How to File BIR form using 3rd Party Application as Tax Agent

1. Click **TAX AGENT** Main Menu Link to show sub-modules under it.
2. Click on **FILE TAX RETURNS** link to access sub-modules under it.



3. Click on **FILE USING 3<sup>RD</sup> PARTY APPLICATION** link to access its screen. System should screen for uploading XML file.
4. Click **BROWSE** to choose XML file to upload into system.
5. Click **SAVE** button to begin uploading process.

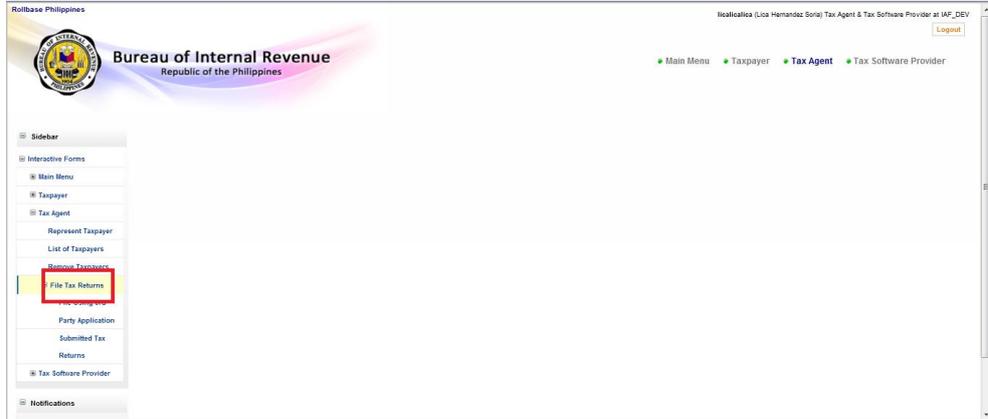
**Note:** When XML file is valid, system should display preview of form that was successfully filed (penalties will be incurred if filing was late).



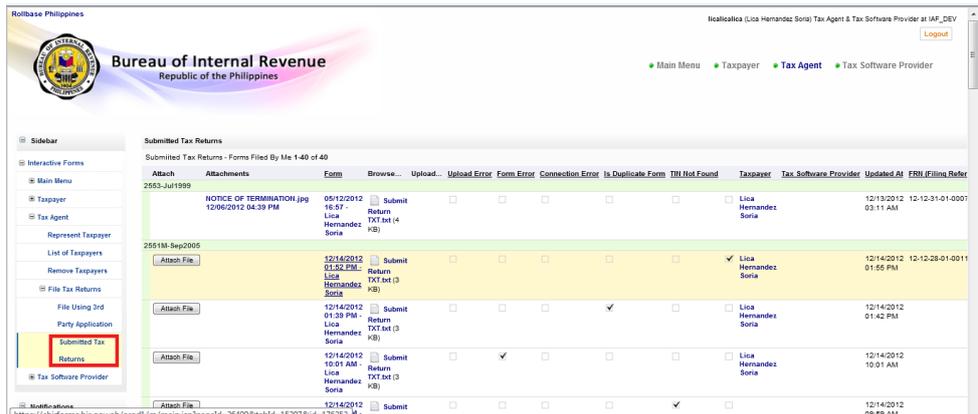


### 6.2.12. How to View Tax Agent History

1. Click **TAX AGENT** Main Menu Link to show sub-modules under it.
2. Click on **FILE TAX RETURNS** link to access sub-modules.



3. Click on **SUBMITTED TAX RETURNS** link to access its screen. System should show all forms filed by the Tax Agent.





## 7. Frequently Asked Questions (FAQs)

### What is the eBIRForms Project?

The eBIRForms project is in line with BIR's efforts to provide more convenient and accessible filing channels to improve efficiency. It will develop the eBIRForms Filing Infrastructure that will allow taxpayers and ATAs to prepare their returns offline, validate, edit, save and print their returns, and submit online.

### How do you make use of the eBIRForms?

There is an offline eBIRForms Package and the online eBIRForms System.

Users must first download the offline eBIRForms Package from the BIR website and install it in his/her computer. The package contains the thirty-one (31) BIR Forms comprised of Income Tax Returns; Excise Tax Forms; VAT Forms; Withholding Tax Forms; Documentary Stamp Tax Forms; Percentage Tax Forms; ONETT Forms and Payment Form. At the bottom of each form page, there is a "Submit" button. To submit the tax return to the online eBIRForms System, users must click on the "Submit" button after successful form validation.

Users must also first be enrolled into the online eBIRForms System when submitting tax returns online. To enroll in the system, go to <https://ebirforms.bir.gov.ph> and click on the "Sign Up" tab.

### What is the offline eBIRForms Package?

The use of offline eBIRForms Package is an alternative mode of preparing tax returns that allows taxpayers and Authorized Tax Agents (ATAs) to accomplish or fill up tax forms offline. Instead of the conventional manual process of filling up tax returns on pre-printed forms that is highly susceptible to human error, taxpayers/ATAs can directly encode data, validate, edit, save, delete, view, print and submit their tax returns. The package can do automatic computations and has the capability to validate information encoded by taxpayers/ATAs.

To download the **Offline eBIRForms Package v2.0**, go to <https://ebirforms.bir.gov.ph>.

### What is the online eBIRForms System?

The online eBIRForms System is a filing infrastructure that accepts and validates tax returns submitted online. The System creates secure user accounts for taxpayers, ATAs and Tax Software Providers (TSPs) for use of the online System, and allows ATAs to file on behalf of their clients. The System also has a facility for TSPs to test and certify the data generated by their tax preparation software (certification is by form). It is capable of accepting returns data filed using certified TSP tax preparation software.

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



### Who can avail of the eBIRForms?

Non-eFPS users or all taxpayers who do not file their taxes through eFPS. Those enrolled in eFPS cannot enroll in eBIRForms and vice versa.

### What are the system requirements for both offline eBIRForms Package and online eBIRForms System?

1. Supported Operating System: Windows XP (Service Pack 3), Windows Vista, Windows 7;
2. Hard disk drive space needed: at least 50 MB free space;
3. RAM memory needed: Runs best on 2GB or higher ActiveX components via Internet Explorer version 8 or higher;
4. Java Run-time Environment version 1.7; and
5. eBIRForms Package is best viewed in 1152 x 864 screen resolution.

### What are the browser requirements?

1. Internet Explorer v9 or up
2. Mozilla Firefox v16 or up
3. Google Chrome v23 or up

### Offline eBIRForms Package

#### Are the offline eBIRForms Package new forms?

No, it is just an electronic format of the existing BIR forms.

#### What are the available forms in the BIR website?

**In PDF:**

Annual Income Tax Return forms (BIR Form Nos. 1700, 1701 and 1702)

**In the offline eBIRForms Package:**

Thirty-one (31) BIR Forms comprised of Income Tax Returns; Excise Tax Forms; VAT Forms; Withholding Tax Forms; Documentary Stamp Tax Forms; Percentage Tax Forms; ONETT Forms and Payment Form.

#### When will the offline eBIRForms Package be available in the BIR website?

The offline eBIRForms Package Version 2.0 is already available for download in the BIR website.

#### How do I download the offline eBIRForms Package?

If you have internet connection:

- Go to <https://ebirforms.bir.gov.ph>



## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents

- Go to the BIR website at [www.bir.gov.ph](http://www.bir.gov.ph). Click on the link to the BIR Forms on the left-hand side of the website. To access the eBIRForms package, click on the eBIRForms icon.

If you do not have internet connection:

- Go to a BIR e-lounge and bring your USB flash drive.
- Save eBIRForms Package installer from the e-lounge computer.

### **The offline eBIRForms Package I'm using doesn't have a "Submit" button on the Forms Page. How do I submit the forms online?**

You need to download and use the latest version of the offline eBIRForms Package. The "Submit" button is available in offline eBIRForms Package v2.0. To download the latest version, click here: <download link>.

### **What program do I use to open the offline eBIRForms Package?**

For the Annual ITR Forms, use PDF-Xchange Viewer. A link to this free software will also be available in the Instructional Guide.

For the remaining forms, just download and install the offline eBIRForms package.

### **What is the difference between the current downloadable forms and the offline eBIRForms Package?**

- Currently there are 2 available types of forms in the BIR website:
  - PDF Format: the form cannot be edited, and can only be printed. Taxpayers need to fill out the form handwritten or use the typewriter.
  - Excel Format: the form can be typed over in a text box, but does not have automatic computations
- Offline eBIRForms Package:
  - The form can be edited and automatic computations are done even if the form is offline
  - Automatic computations in the forms avoid errors in manual computation\

Note: The Annual ITR Forms are not available in the offline eBIRForms Package, however it is available in interactive PDF format. These can also be downloaded from the BIR website.

### **Will the current downloadable forms still be available at the BIR website?**

Yes. The current downloadable forms will still be available. There will be a new link for the forms.

### **What is the difference between eFPS and the offline eBIRForms Package (in terms of target taxpayers)?**



## **GUIDE FOR eBIRFORMS**

Job Aid for Taxpayers and Accredited Tax Agents

- Large taxpayers and selected taxpayers are the primary users of the eFPS.
- Non-individual and individual taxpayers and ATAs are the target users of the eBIRForms.

### **What is the page setup when I print the forms?**

Page setup margins:

- Left: 0.146 inches
- Right: 0.148 inches
- Top: 0.14 inches
- Bottom: 0.14 inches

### **What size of paper do I print the form on?**

Legal size or Folio size (8.5" x 13")

### **How do I submit the offline eBIRForms online?**

Click on the "Submit" button on the bottom part of the form screen of the offline eBIRForms Package. Upon clicking on the "Submit" button, you will be redirected to the online eBIRForms System.

## **Online eBIRForms System**

### **How do I enroll into the online eBIRForms System?**

Click on the "Sign Up" tab and follow the enrollment instructions.

For you to start using the online eBIRForms System, your account must first be activated by your RDO. Account activation requirements and instructions will be sent to the e-mail account you used to enroll into the system.

### **What are the procedures and requirements for account activation?**

#### **Procedure:**

1. Print the e-mail enrollment notification.
2. Go to your Revenue District Office (RDO).
3. Present account activation requirements.

#### **Account Activation Requirements:**

If you are enrolling as a:

##### **A. Taxpayer – Individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent

##### **B. Taxpayer – Non-individual**

## GUIDE FOR eBIRFORMS

Job Aid for Taxpayers and Accredited Tax Agents



1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

### C. Taxpayer and Tax Agent – Individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation

### D. Taxpayer and Tax Agent – Non-individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

### E. Taxpayer and Tax Software Provider – Individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. TSP Application Form
5. Copy of BIR Registration
6. Copy of Registration Fee Payment
7. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure

### F. Taxpayer and Tax Software Provider – Non-individual

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. TSP Application Form
5. Copy of BIR Registration
6. Copy of Registration Fee Payment
7. Certification from System Documents
  - a. Application name and software use (development and database)
  - b. Functional description (modules)
  - c. Back-up and archiving procedure
8. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

**G. Taxpayer, Tax Agent and Tax Software Provider – Individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. TSP Application Form
7. Copy of BIR Registration
8. Copy of Registration Fee Payment
9. Certification from System Documents
  - d. Application name and software use (development and database)
  - e. Functional description (modules)
  - f. Back-up and archiving procedure

**H. Taxpayer, Tax Agent and Tax Software Provider – Non-individual**

1. Printed e-mail enrollment notification
2. 2 Valid IDs
3. Letter of Intent
4. Tax Agent Authorization Letter signed by the client taxpayer
5. Copy of Certificate of Accreditation
6. TSP Application Form
7. Copy of BIR Registration
8. Copy of Registration Fee Payment
9. Certification from System Documents
  - d. Application name and software use (development and database)
  - e. Functional description (modules)
  - f. Back-up and archiving procedure
10. Board Resolution authorizing any of the two (2) officers designated to file the return under Section 52 (A) of the Tax Code (President of other principal officer and Treasurer or Asst. Treasurer of the Corporation)

\*If you have an authorized representative, representative should also present the following:

- c. Authorization Letter
- d. 2 valid IDs of authorized representative

**Reminders:**

1. Individual and corporate taxpayers shall be allowed to enroll up to a maximum of three (3) user accounts for a particular TIN.
2. For juridical entities or artificial persons, enrollment shall be made by the officers required by law to file the returns. Thus, for domestic corporations, it shall either be the President, Vice President or other principal officers; for partnerships, the managing partner; for joint ventures, the managing head; and for resident foreign corporation, the head country manager.
3. The principal officer may delegate enrollment and filing of returns, however, an authorization must be issued by the principal officers delegating enrollment and filing to particular/identified company personnel.

Account activation will be done by your respective RDO.

## **GUIDE FOR eBIRFORMS**

Job Aid for Taxpayers and Accredited Tax Agents



### **How do I know if the form has already been submitted to the online eBIRForms System?**

The eBIRForm has been successfully filed if the system displays the Filing Reference Number (FRN) field along with the continue button to go to the FRN page. The page should also display the message “The form has been successfully filed”.

Users can also view their submitted forms by clicking on the “Submitted Tax Returns” link.

### **How do I file an amended return?**

Click on “Yes” under the “Amended Return?” part of the form when using the offline eBIRForms Package. The online eBIRForms System will be able to identify if the form filed is amended or not.