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: <u>www.bir.gov.ph</u>



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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

Term	Definition					
Offline	Activity is accomplished while individual is not					
	connected to the internet					
Online	Activity is accomplished while individual is					
	connected to the internet					
Manual filing	Taxpayer fills up form offline, prints it and submits					
	form to AAB, RDO/ RCO					
Electronic filing (in	Taxpayer fills up form using:					
reference to the use of	 eBIRForms package (offline) 					
the eBIRForms)	Downloadable Excel or PDF eBIRForms					
	(1700, 1701, 1702)					
Manual payment	Taxpayer or ATA physically hands over payment to					
	AAB or RCO					
Electronic payment	Taxpayer or ATA enrolls in a payment system, and					
	directly uses the system for payment online					

2.1. Definition of Terms

2.2. Acronyms

Term	Definition				
AAB	Accredited Agent Bank				
АТМ	Automated Teller Machine				
eBIRForms	Electronic Bureau of Internal Revenue Forms				
eFPS	Electronic Filing and Payment System				
ESM	Efficient Service Machine				
ОТС	Over-the-Counter				
PDF	Portable Document Format				
RCO	Revenue Collection Officer				
RDO	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 systemcertified 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 <u>not</u> new forms. They are the existing BIR Forms in electronic format.

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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

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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:

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

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

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4. Set the Browser Mode to Internet Explorer 9.

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

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

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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 <u>http://www.bir.gov.ph</u>. Click on the eBIRForms icon/link on the lefthand 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)



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3. Unzip the contents of the zipped file.

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Organize 🔻 Incl	ude in library	 Share w 	vith 🔻	Burn	New folder	•	0
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2 items							

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 that Windows XP).

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6. Click 'Next.'



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

1 Setup - eBIRForms
Select Destination Location Where should eBIRForms be installed?
Setup will install eBIRForms into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\eBIRForms Browse
At least 48.8 MB of free disk space is required.
< Back Next > Cancel





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

1 ¹ / ₂ Setup - eBIRForms
Select Start Menu Folder Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
EBIRForms Browse
$\langle \rangle$
<pre> Back Next > Cancel </pre>

9. Click 'Install.'

18 Setup - eBIRForms	
Ready to Install Setup is now ready to begin installing eBIRForms on your computer.	
Click Install to continue with the installation, or click Back if you want to review or change any settings.	
Destination location: C:\eBIRForms	4
Start Menu folder: eBIRForms	
< Back Install Co	ancel





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

🕼 Setup - eBIRForms	
Installing Please wait while Setup installs eBIRForms on your computer.	
Extracting files C:\eBIRForms\BIRForms.exe	
(Cancel

11. Click 'Finish' to complete the installation.





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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.'







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

🖥 Setup - eBIRForms
Select Destination Location Where should eBIRForms be installed?
Setup will install eBIRForms into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
E:\eBIRForms Browse
At least 48.8 MB of free disk space is required.
< Back Next > Cancel

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

Browse For Folder	<
Browse For Folder Select a folder in the list below, then click OK. C:\eBIRForms Image: Color Disk (C:) Image: C	
Second State S	

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

Browse For Folder	<
Select a folder in the list below, then click OK.	
E:\eBIRForms	
0	
OK Cancel	

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

🕼 Setup - eBIRForms 📃 🗖 🔀
Select Start Menu Folder Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse. BIRForms Browse
$\overline{\Box}$
< Back Next > Cancel

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8. Click 'Install.'

🔂 Setup -	eBIRForms	×
Ready t Setup	o Install is now ready to begin installing eBIRForms on your computer.	3
Click I chang	nstall to continue with the installation, or click Back if you want to review or je any settings.	
Dest C	ination location:	
Start e	t Menu folder: BIRForms	
<		
	< Back Install Cancel	

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



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10. Click 'Finish' to complete the installation.

🕞 Setup - eBIRForms	
	Completing the eBIRForms Setup Wizard
	Setup has finished installing eBIRForms on your computer. The application may be launched by selecting the installed icons.
	Click Finish to exit Setup.
	$\langle \rangle$
	Finish

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





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

🖙 TO USB (E:)				
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File and Folder Tasks Image: Constraint of the constra	New Folder	eBIRForms	0	
Other Places				
Details				
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13. To use the eBIRForms Package, click on "BIRForms".





5.2. How to Update the Offline eBIRForms Version

1. Open Offline eBIRForms Package



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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 dialogue 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.

Bureau Rep	of Internal Rev	venue	
nome About os Announcen	FAQs Updat	es Legal Matters Archive	
:. Special Sites	. Electronic Bure	au of Internal Revenue Form	S
:: Tax Code :: Tax Calendar :: BIR Forms :: Zonal Values :: Taxpayer Bill of Rights :: PSIC/PSOC :: Anti-Corruption Law	Overview	Electronic BIR Forms (eBIRForms)
:. BIR Portal To access other BIR eServices and internal applications, click here.	The Electronic developed prima through easy pre which deviates fr printed forms th taxpayers to acco validate, edit, sax computations and	Bureau of Internal Revenue rily to provide taxpayers with paration. eBIRForms is an alterr om the conventional manual pro- at are highly susceptible to hu implish or fill up the forms offline re, delete, view and print their ta has the capability to validate inf	e Forms (eBIRForms) Package is accessible and convenient service native mode of preparing tax returns access of filling up tax returns on pre- man error. The package allows the . Taxpayers can directly encode data, x returns. The package has automatic ormation inputted by the taxpayers.
:. Contact Us	Coverage	has the capability to validate in	
BIR wants to hear from you. We welcome your queries, comments and suggestions. Feel free to call us at 981 -	Form No.	Latest Revision Date	Form Name

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

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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	*Taxpayer Identification Number: RDO Code:	These are the boxes where you can enter/edit data.
Radio Button	ATC C FP010	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	Tax Due .0 14E .0 15E .0 15E 10 16E	These are the boxes that are automatically computed based on the data entered by the user.
Hyperlink	Schedule 1	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.

File Help		Government Property Not Fo
	Profile	
	Taxpeyer Identification Number: RDO Code: Line of Business:	_
	Taxpayer's Name (Last Name, First Name Middle Name For Individual) Registered Name (For Non-Individual) :	_
	Registered Address:	
	Zip Code:	
	(Please Select)	up
	File Name Return Period Date Created	

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.

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eBIRFor	ms v1.0
?	You are using an older version of ActiveX components! To fully utilize this software, please install ActiveX components. Click 'OK' to go directly to the download site. Click 'Cancel' should you want to download later.

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

eBIRFor	ms v1.0 🛛 🔀
<u>.</u>	eBIRForms software will now terminate.
	ОК



5.5.2. How to Install ActiveX Component

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

eBIRFor	ms v1.0
?	You are using an older version of ActiveX components! To fully utilize this software, please install ActiveX components. Click 'OK' to go directly to the download site. Click 'Cancel' should you want to download later.

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 IE8¹.

Microsoft Search Download Ce	nter PRODUCTS STORE DOWNLOAD	os support	United States Sign in
Download Cen	ter		
Products Categories	Security Support		
C Windows	Internet Explorer 8 for Wind	dows XP	<i>∞</i> <
Quick links	Internet Explorer 8. Faster, Easier, More Priva	ite, and More Secure.	
↓ Overview			
 ✓ System requirements ✓ Instructions 	Quick details		
↓ Additional information	Version: 8.0 Change language: English	Date published:	3/19/2009
	File name	Size	6
Looking for support?	IE8-WindowsXP-x86-ENU.exe	16.1 MB	
Visit the Microsoft Support site now >			
	Overview		
COTTice 365	Internet Explorer 8 is the latest version of the familiar web browser want from the web faster, easier, more privately and securely than	you are most comfortable using	g, helping you get everything you
Introducing Microsoft Office 365.	Faster Internet Explorer 8 is more responsive with new pages ar	nd tabs, opening up fast and reli	ably. You can now get to the

¹ This is just a sample browser that has the ActiveX Components.



5. Click 'No Thanks and Continue.'

× May we also suggest Here are some additional downloads to enhance your experience with Microsoft products File name Size Cumulative Security Update for Internet Explorer 8 for Windows XP (KB2618444) 10.1 MB **(**) This update addresses the vulnerability discussed in Microsoft Security Bulletin MS11-099. Microsoft® Windows® Malicious Software Removal Tool (KB890830) 15.7 MB () 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. Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint File Formats 37.0 MB () Ca -Ľ۵. 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. NO THANKS AND CONTINUE

6. Wait until the download is complete.

Microsoft Search Download Center PRODUCTS STORE DOWNLOAD	S SUPPORT United States
Download Center	
Products Categories Security Support	
C Thank you for downloading	
Windows Internet Explorer 8 for Windows XP If your download does not start after 30 seconds, click here: Start download	For you
Instructions	Get Windows 7 today Choose the edition that's right for you.
 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. 	Microsoft Security Essentials Protect your PC from viruses, spyware, and other malicious software.
To save the download to your computer for installation at a later time, click Save. To cancel the installation, click Cancel.	Get the latest version of Windows Internet Explorer Internet Explorer.
	Strate Windows Intune
\sim	Secure and manage PCs
B8-Windows/IP-x86-Eexe	





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.'

Open Fi	le - Security Warning	X	
Do you	Do you want to run this file?		
	Name: IE8-WindowsXP-x86-ENU.exe		
	Publisher: Microsoft Corporation		
	Type: Application		
	From: C:\Documents and Settings\INDRA\Desktop		
CZ Alu	Run Cancel	כ	
M Alwa	ays ask before opening this life		
٩	While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. <u>What's the risk?</u>		

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

Extracting Files		
Extracting File: To Directory:	shdocvw.dll d:\09f61a4214a120ccb4df	





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.'

🖉 Install Windows Internet Explorer 8	
Get the latest	: updates
🗹 Install updates	
This will install updates for W Software Removal Tool to he	/indows, Internet Explorer, and the Windows Malicious Ip protect your computer against security threats.
The Windows Malicious Softw and remove known malicious	vare Removal Tool will run during installation to detect software.
Learn more about updates online	< Back Next > Cancel

12. Wait until installation is complete.





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.

🖉 Install Windows Internet Explorer 8	×
Internet Explorer has been uninstalled	
A previous version of Internet Explorer was removed. After restarting your computer to complete removal and logging in, installation will begin automatically and your computer will restart again to finish installation. Assistive technology software that runs on Windows, such as screen reading software, will not be able to read the screens that appear while installation is being completed (after your computer restarts) because those screens are displayed before the assistive technology starts.	
Restart now (recommended) Restart later	



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

IRForms v0.0.1.5		
File		Government Property Not For
	Profile	
	*Taxpayer Identification Number: RDO Code: Line of Business:	
	111 - 111 - 111 - 000 039 🔽 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: Telephone Number:	
	1100 9284563	
	List of BIR Forms:	
	BIR Form 0605 - Payment Form	
	File Name Return Period Date Created	

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

eBIRForms v0.0 1.5		
File Help		Government Property Not For Sale
	Profile	
	*Taxpayer Identification Number: RDO Code: Line of Business:	
	111 - 111 - 111 - 000 039 🔽 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	Ξ
	Zip Code: Telephone Number:	
	1100 9284563	
	List of BIR Forms:	
	BIR Form 0605 - Payment Form	
	File Name Return Period Date Created	
	LIPPIS	
		and the second se

- 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

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
		Taxpeyer Identification Number: RDO Code: Line of Business: 111 - 111 - 010 039 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: Telephone Number:
		1100 9284563
		List of BIR Forms:
		BIR Form 0605 - Payment Form
		File Name Return Period Date Created
		LIPPI
and the second second		

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

eBIRForms v0.0.1.		
File Help	Gov	ernment Property Not For Sale
	Drafila	
	Prome	
	*Taxpayer Identification Number: RDO Code: Line of Business:	
	111 - 111 - 111 - 000 039 🔽 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 Allev2 Project 6. Quezon City	
	Zip Code: Telephone Number:	
	9284363	
	List of BIR Forms:	
	Fill-up	
	File Name Patien Daried Date Created	
	LIPP	

• **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

eBIRForms v	0.0.1.5	
File	Help	Government Property Not For Sale
		Profile
		*Taxpayer Identification Number: RDO Code: Line of Business:
		111 - 111 - 111 - 000 039 - 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: Telephone Number:
		1100 9284563
		List of BIR Forms:
		BIR Form 0605 - Payment Form
		File Name Return Period Date Created
		LIPPIN CONTRACTOR

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• 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: RDO Code: Line of Business:	
	111 - 111 - 111 - 000 039 👤 Real Estate	
	Taxpayer's Name (Last Name, First Name Middle Name For Individual) Registered Name (For Non-Individual) :	
	Dela Cruz, Juan Salazar	
	Registered Address:	
	The Arley's Project 6, Dulezon City	
	1100 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

ile Help		Government
	Profile	
	*Taxpayer Identification Number: RDO Code: Line of Business:	
	111 - 111 - 111 - 000 039 💌 Real Estate	
	Taxpayer's Name (Last Name, First Name Middle Name For Individual)	
	Registered Name (For Non-Individual) : Dela Cruz, Juan Salazar	
	Renistared Address:	
	16 Alley2 Project 6, Quezon City	
	Zip Code: Telephone Number:	
	1100 9284563	
	List of BIR Forms:	
	BIR Form 0605 - Payment Form	
	File Name Return Period Date Created	
Job Aid for Taxpayers and Accredited Tax Agents



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

eBIRForms v0.0.1.5		
File Help		Government Property Not For Sale
	Taxpayer's Name (Last Name, First Name Middle Name For Individual) Registered Name (For Hon-Individual) :	
	Dela Cruz, Juan Salazar	
	Registered Address:	
	16 Alley2 Project 6, Quezon City	
	Zip Code: Telephone Number:	
	1100 9284563	
	List of BIR Forms	
	BIR Form 0605 - Payment Form	
	File Name Return Period Date Created	
	C 111111111000-0605-12122012153610 12/12/2012 15:36:10 08/30/2012 15:36:10	
	CIPPL	
	View Delete	
	Bureau of Internal Revenue	

- 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.'

RDO Code: Line of Business:	
liddle Name For Individual)	
ALL TELL	Л
Telephone Number:	
9284563	
	U
8 x 2 /	
Return Period Dat	e Created
	Pea Estate Itidde Hanne For Individual Telephone Hamber: p284563 Return Period Dat

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





17. 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

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



2. You will be directed to the form screen.

Help				Government Property Not For Sale
	Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas Internas	Payment Form	BIR Form No. 0605 September 2003(ENCS)	
	1 For the Calendar C Fiscal 3 Quarter 2 Year Ended (MM/YYYY) C tot C 2nd C 03 - March ¥ 2013	3rd C 4th 4 Due Date (MM/DD/YYYY) 5	0 No. of Sheets Attached	
	7 Return Period (MM / DD /	8 Tax Type		
	Part I	Background Informatio	n	
	9 Taxpayer Identification No. 10 RDO Code	11 Taxpayer Classification	12 Line of Business/Occupation	
	13 Taxpayer's Name (Last Name, First Name, Middle Name for Indivi SORIA, LICA HERNANDEZ	duals) /(Registered Name for Non-Individuals)	14 Telephone Number 9286789	
	15 Registered Address 7-A ROAD 6 PROJECT 6 QUEZON CITY		16 Zip Code 1100	
	17 Manner of Payment		18 Type of Payment	
	Voluntary Payment	Per Audit/Delinquent Account	C Installment	
	C Self-Assessment	C Preliminary/Final Assess/Deficiency Tax	No. of Installment	
	Penalties Tax Deposit/Advance Payment Income Tax Second Installment(Individual) Others(Specify)	C Accounts Receivable/Delinquent Account	C Partial Payment C Full Payment	
	Part II	Computation of Tax		
	19 Basic Tax/Deposit/Advance Payment 20 Add: Penalties Surcharge Interest	Compromise	19 0.00	
	20A 0.00 20B	0.00 20C 0.	00 20D 0.00	
	21 Total Amount Payable(Sum of Items 19 & 20D)		21 0.00	
	Pre-approved by Investigating Office	C Not appro	ved by Investigating Office	
	Validate Edit S	ubmit Save Print	Final Conv	

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

- 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.



- 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.

	Validate	Edit	Submit	Save	Print	Final Copy	
Fotal					0.1	L mun L	0.0
10		ATC					0.0
9		ATC					0.0
8		ATC					0.0
7		ATC			Í.	ĺ	0.0
		AIC					0.0

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

File	ers\maasoria\AppData	\Local\Temp\{1F27B6EF-	AE36-4792-9D62-F528F6618A5C}\forms\B	IR-Form0605.hta	ALC: HAR BEET
Prin	nt				
Car	ncel Print		P. 10. PT.		BIR Form No.
			Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas	Payment Form	0605 September 2003(ENCS)



• 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.

3	C:\Users\maasoria\AppDat	a\Local\Temp\{1F27B6EF-	AE36-4792-9D62-F528F6618A5C}\forms\B	IR-Form0605.hta	ALC: COMMENTS	
	File					Gove
	Print					
\bigcirc	Cancel Print		Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas	Payment Form	BIR Form No. 0605 September 2003(ENCS)	

Final copy

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

6		ATC	í				0.00
7		ATC			- <u> </u>		0.00
8		ATC					0.00
9		ATC					0.00
10		ATC					0.00
Total							0.00
	Validate	Edit	Submit	Save	Print	Final Copy	
	Validate	Edit	Submit	Save	Print	Final Copy	

- 6. 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.





5.5.5. How to Return to Parent Screen

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

Form No. 0605	COLUMN TWO IS NOT THE OWNER.	
File Help		Government Property Not For Sale
\bigcirc	Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas Internas Payment Form	n O605
	1 For the C Calendar C Flocal 3 3 4 Due Date (MIMDDYYY) 2 Year Ended (MIMYYY) 0 1st 2nd 3rd 4th 03 - March 2013 0 1st 3rd 4th	S No. of Sheets Attached 6 ATC 0 0
	7 Return Period (MM / DD / 8 Tax Type	
	Partl Background Info	rmation
	9 Taxpayer Identification No. 10 RDO Code 11 Taxpayer Classification	12 Line of Business/Occupation
	456 789 123 000 005 - CICN	BUSINESS ANALYST
	13 Taxpayer's Name (Last Name, First Name, Middle Name for Individuals) /(Registered Name for Non-Individuals SORIA, LICA HERNANDEZ	s) 14 Telephone Number 9286789
	15 Registered Address 7-A ROAD 6 PROJECT 6 QUEZON CITY	16 Zip Code 1100
	17 Manner of Payment	18 Type of Payment
	Voluntary Payment Per Audit/Delinquent Account	unt C Installment
	C Self-Assessment C Preliminary/Final Assess/Deficie	ncy Tax No. of Installment
	Penalise Penalise Accounts Receivable/Delinquent Tax Deposit/Advance Payment Income Tax Second Installment[Individual) Others(Specify)	Account C Partial Payment C Full Payment
	Part II Computation of T	ax
	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
	C Pre-approved by Investigating Office	Not approved by Investigating Office
	Validate Edit Submit Save	Print Final Copy

2. Click 'File' then select Main Screen.

😂 BIR Form No. 0605						- 2 🛛
File Help						Government Property Not For Sale 🌥
Main Screen						
Save						
Print Preview	Republika ng Pilipinas	-	aumont Form		No.	
Exit	Kawanihan ng Rentas Interr	nas 🔽	rayment Form	Septembe	r 2003(ENCS)	
	1 For the 🤨 Calendar C Fiscal	3 Quarter	4 Due Date (MM/DD/YYYY)	5 No. of Sheets Attached	6 ATC	
	2 Year Ended (MM/YYYY) 12 - December 2012	C _{1st} C _{2nd} © _{3rd} C _{4t}	07 30 2012	0	MC180	
	7 Return Period (MM / DD / YYYY)	07 30 2012	8 Tax Type Rf			
	Part I		Background Informat	tion		
	9 Taxpayer Identification No.	10 RDO Code 11	Taxpayer Classification	12 Line of Business/Occu	upation	
	111 111 111 000	039 🔽	●I [®] N	REAL ESTATE		
	13 Taxpayer's Name (Last Name, First Name DELA CRUZ, JUAN SALAZAR	s, Middle Name for Individuals) /(Regis	tered Name for Non-Individuals)	14 Telephone Number 9284563	_	
	15 Registered Address 16 ALLEY 2 PROJECT 6, QUE	ZON CITY		16 Zip Code	_	3
	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.

eBIRForms	v0.0.1.5		
File	Help	Gov	ernment Property Not For Sale
1.00	TER	Profile Taxpayer Identification Number: 111 - 111 - 111 - 000 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 List of BIR Forms:	
		BIR Form 0605 - Payment Form Till-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.

eBIRForms	v0.0.1.5		
File	Help		Government Property Not For Sale
		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: Telephone Number:	
		1100 9284563	
		List of BIR Forms:	
		BIR Form 0605 - Payment Form	
		File Name Return Period Date Created	
		C 111111111000-0605-12122012153610 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.

Print Ctrl+P	Print	*
Print preview	File	•
Page setup.	Zoom (100%)	
Search	Safety	•
	View downloads	Ctrl+J
	Manage add-ons	
SIGN IN	F12 developer tools	
New here? Sign Lin	Go to pinned sites	
s Search	Internet options	



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

Page Setup		x
Paper Options Page Size: Letter Portrait Clandscape Print Background Colors and Images Landscape Finable Shrink-to-Fit	Margins (inches) Left: 0.75 Bight: 0.75 Top: 0.75 Bottom: 0.75	
Headers and Footers <u>H</u> eader: Title	Footer: ▼ URL	•
-Empty-	▼ -Empty-	•
Page # of total pages Change font	Date in short format	-
	OK Cancel	

- 5. 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.

Paper Options	Margins	(inches)
Page Size:	Left:	0.146
8.5x13 (Custom)	Right:	0.148
Portrait	Top:	0.14
Print Background Colors and Images	Bottom:	0.14
Headers and Footers	East	
Header:	Foot	er:
-Empty-	• [-Em	pty-
-Empty-	▼ -Em	pty-
-Empty-	▼ -Em	pty-
Change font		

6. Click 'Ok' after changes have been done.

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

۲	C:\Users\maasoria\AppData\Local	\Temp\{1F27B6EF-AE3
	File	
	Main Screen	
	Save	
>	Print Preview	
	Exit	
		1 For the Calenda
		2 Year Ended (MM/Y)
		-
		7 Return Period (MM)
		Part

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

kancel Print	pinas ananalapi Intas	Payment Form	BIR Form No. 0605 September 2003(ENCS
1 For the C Calendar C Facal 2 Year-Ended (MMYYYY)	3 Quarter C 1st C 2nd C	ird C 4th	5 No. of Sheets Attached 6 ATC
7 Return Period (MM / DD / YYYY)		8 <u>Tax Type</u>	
Part I		Background Inform	ation
9 Taxpayer Identification No.	10 RDO Code	11 Taxpayer Classification	12 Line of Business/Occupation
111 111 111 111	013 🖵	CI ©N	aaaa
13 Taxpayer's Name (Last Name, First N Lica	ame, Middle Name for Individue	is) /(Registered Name for Non-Individuals)	14 Telephone Number 4234567
15 Registered Address Quezon City			16 Zip Code 1100
17 Manner of Payment			18 Type of Payment
Voluntary Payr	nent	Per Audit/Delinquent Account	C Installment
Self-Assessment Penalties Tax Deposit/Advance Payment Income Tax Second Installment[In Others[Specify]	dividual)	Preliminary/Final Assess/Deficiency Tax Caccounts Receivable/Delinquent Account	No. of Installment Partial Payment Full Payment

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

🖶 Print	
General Options	
Select Printer	
🔚 Add Printer	HP Laserjet P2050 SWD
Fax	HP LaserJet P3010 Serie
HP LaserJet P1006	🔚 Microsoft XPS Docume
<	•
Status: Offline	Print to file Preferences
Location:	
Comment:	Fin <u>d</u> Printer
Page Range	
Ali	Number of <u>c</u> opies: 1
Selection	
⊘ Pages: 1	
Enter either a single page number or a single	11 22 33
page range. For example, 5-12	
	rint Cancel Apply

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

1. Click the 'Schedule 1' hyperlink.

			Volume of	t i		Provisional				Final			
			Mineral Remo	wed	Actual/Fair Ma	rket Value	Tax Rate	Tax Due	Actual/Fair N	larket Value	Rate	Tax Due	Adju
ATC	Description	Place of Removal	Taxable(A)	Exempt(B)	Taxable(C)	Exempt(D)	(E %)	(F)	Taxable(G)	Exempt(H)	(1 %)	(J)	
XM010	Coal and Coke		0.00	0.00	0.00	0.00	10.00/MT	0.00	0.00	0.0	10 00MT	0	00
XM020	Non-metallic minerals and quarty resources		0.00	0.00	0.00	0.00	2.00%	0.00	0.00	0.0	2.00%	0	00
XM030	Copper and Other Metallic Minerals		0.00	0.00	0.00	0.00	2.00%	0.00	0.00	0.0	2.00%	0	00
XM0 40	Gold and Chromite		0.00	0.00	0.00	0.00	2.00%	0,00	0.00	0.0	2.00%	30	.00
XM050	Indigenous Petroleum		0.00	0.00	0.00	0.00	3.00%	0.00	0.00	0.0	3.00%	0	00
XM061	Natural Gas or Liquefied Natural Gas (locally extracted)		0.00	0.00	0.00	0.00	0.00%	0.00	0.00	0.0	0.00%	0	.00
Othera	s (Please Spr	cify)											
				Volum	to 9		Pro	visional	1		Final		
				Mineral Re	emoved	Actual/Fair I	Market Val	lue Rate	Tax Due	Actual/Fair Market	/alue	Rate Tax	Due
	ATC	Description	Place of Removal	Taxable(A)	Exempt(B)	Taxable(C)	Exer	mpt(D) (E %)	(F) T	axable(G) E	empt(H)	(1%) ((L
1			0.0	0 0.0	0	0.00	0.00 0.	00	0.00	0,00	0.00 0.0	0	0.00



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

BIR	Form No. 2	200-M		Concerned in the
	File	Help		
\sim	Main Sc	reen		OF REMOVALS AN
	Save			
	Print Pr	eview - Fo	m	N
C T	Print Pr	eview - Scl	nedule(s)	Taxable(/
1	Exit			
	XM020	ninerals and quarry resources		
	×M030	Copper and Other Metallic Minerals		

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



4. Click 'Preferences.'

eneral Options	
Select Printer	
🔚 Add Printer	👼 HP Laserjet P2050 SWD
Fax .	HP LaserJet P3010 Serie
HP Color LaserJet CP3525 on 192	2.168.41.4 🛛 🖶 Microsoft XPS Docume
•	•
Status: Ready	Print to tile Preferences
Location: 12 Floor BD Area	
Comment:	Find Printer
Page Range	
All	Number of copies: 1
Selection	
Pages: 1	Collate
Enter either a single page number or a sin page range. For example, 5-12	ingle 112233

Job Aid for Taxpayers and Accredited Tax Agents



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

Advanced	Printing Shortcuts	Paper/Quality	Effecte	Finishing	Job Storage	Color Service	
A printing with a sing Printing sh	shortcut is a collection gle click. nortcuts:	on of saved print	settings t	hat you car	select	E	
	Factory Defaults					1	
	EcoSMART Settin	igs	ς	Ş	Paper sizes: Letter Paper source Automaticall Pages per sh 1 page per s Print on both No Paper type: Unspecified Orientation: Portrait	8 y Select eet: hheet sides:	5 × 11 inches
S	ave As	Delete	Re	set			
(p)						About	Help

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 (<u>https://ebirforms.bir.gov.ph</u>).

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
		Inter	active Forms Announ	cements		
e						
ecords to display.						

2. Click on the Sign-up tab.



Job Aid for Taxpayers and Accredited Tax Agents



3. 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".



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 "fefer to the Bureau of Internal Revenue of BIR. The legal name of the works of the website. The term "gourder" of the transpare, tax agent, tax software provider or any user or viewer of our site. The Bureau reserves the right to modify these terms of 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

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Job Aid for Taxpayers and Accredited Tax Agents



4. Fill-up fields required² under enrollment.

Home	in Sign-up	Download Forms	Contact Us	FAQs	EIR Website
Enroliment					
Application Information * .	Required				
Taxpayer Identification Number		1			
	Format, and and and and	-			
Applicant Type	Cindividual O Non-Individual				
Revenue District Office	- Please select				
Line of Business / Occupation					
	Note: Line Of Business / Occupation is no Ex: 104/ETALL/C ORE MWNG: Please of	indetory for Non-Individual ap-	Not of PSICe		
Address Information					
Unit / Room Number / Floo	×				
Lot # / Block # / Phase # / Building	•				
Building Nam					
Street Nam	•				
Barangay Nam					
Subdivision / Villag	8				
Provinc					
Municipality/Cit	y a				
ZIP Cod					
	5 m				
Contact information					
Email Address *			Telephone Number		
Alternate Email Address	-			Format: Here was asso	
			Cellphone limpher		
			Centrone namoer	Format ennemene	
Former					
Security					
Login Name					
	Login Name should be adeas: if characters				
Challenge Question	Please select				
Answer *					
Confirm Answer					
		Dragood			

- 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.

ſ	The page at https://ebirforms.bir.gov.ph says:
	Are you sure you want to proceed to enrolment?
	OK Cancel

 $^{^{\}rm 2}$ Required fields are those with red asterisk



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

Logis	Sign-up	Download Forms	Contact Us	FAQS	BIR Website
21227-0381" has been (created.				
r User Classification if a	applicable.				
applicable)					
ion Number					
ROVIDER					
99 N N N	a	100 2000			
tof a fax agent or a rax as	offware provider piease	CICK ON SUDVILE			
		Submit			
	Place Classification if i applicable) on Number Norode Tax agent or a tax agent		Logit Sign up Download forms *1227-0381" has been created. ************************************	Login Sign-up Download forms Contact Us *1227-0381" has been created. r User Classification if applicable. applicable) innumber "ROVIDER hot a tax agent or a tax software provider please click on Submit Submit	Logit Sept-up Download forms Contact Us FAQs *1227-0381" has been created. r User Classification if applicable. applicable) innumber "ROVIDER

*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.



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.

lome		Login	Sign-up	Download Forms	Contact Us	FAQs	BIR We
Account	Activation	e Instruction					
les	tructions:						
Tax	payer/Tax (Software Provider In	dividual				
	Print the	e-mail enrollment n	offication				
	Go to you	ur Revenue District (Office (RDO).				
	Present:	2 Valid ID's and the	printed e-mail notificatio	n.			
	Submita	a copy of your letter o	fintent.				
	For autho	orized representativ	e				
	Aut	thorization Letter					
	2 14	alid IDs of principal					
	2 4	alid IDs of represent	tative				
Rer	minders:						
1.1	ndividual ar	nd corporate taxpay	era shall be allowed to e	enroll up to a maximum of thre	e (3) user accounts for a p	articular TIN	
2.F	orjundical	entities or artificial (persons, enrollment shi	all be made by the officers req	uired by law to file the retu	ms. Thus, for domestic	corporations,
it si	hall either b	be the President, Vic	e President or other prin	ncipal officers; for partnership	s, the managing partner, h	or joint ventures, the ma	anaging head.
and	d for reside	nt foreign corporatio	n, the head country mar	nager.			
3.1	The principa	al officer may delega	te enroliment and filing	of returns, however, an author	rization must be issued by	the principal officers d	elegating
enr	oltment an	d filing to particular/	dentified company pera	onnel.			
				Go to Homepage			

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
- 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

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 Nonindividual
 - 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.



- 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.

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Webst
					1999	I matthe
				Star Sector Card		
		P	Secured Governme	nt Login Portai		
		Usernam	e:			
		Password	z			
		E Remi Sign Up (ember user name Forgot your password?	Login		
					<u>_</u>	

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

Create New Password		Submit
For security reasons please of	hoose a new password	Red - Required Information
New Password		
Verify New Password		
Password Requirements	Passwords must be at least 8 characters long. Passwords must include at least 1 non-alphabetical character. Passwords are case-sensitive	
		Submit

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.

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 (<u>https://ebirforms.bir.gov.ph</u>).

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
		Inter	active Forms Announ	cements		
ie :						
ecords to display.						

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

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	EIR Websit
			/			
				101112-00		
		1	Secured Governme	nt Login Portal		
		Usernan	ne:			
		Passwo	α.			
		E Ren	rember user name	Login		
		Sign Up	[Forgot your password?			



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

BIRForms	Boalloalloa (Lica Hernandez Soria) Tax Software Provider at BR Online Interactive Form
Bureau of Internal Revenue Republic of the Philippines	• Main.Menu • Taxpayer • Tax Software Provider
idebar	
Interactive Forms	
🗃 Main Menu	
My Profile	
Change Password	
Update User Profile	
Update User Role	
Enroll More Users	
iki Taxpayer	
(ii) Tax Software Provider	
User Information	
rst Name: Lice	

4. Click on "Update User Profile" under the Sidebar.





5. Update information that needs to be updated. Click "Save".

🜙 Lica Hernandez So	nia Use X	
$\leftarrow \rightarrow \times \land$	https://ebirforms.bir.gov.ph/prod1/r	ı/main.jsp?pageld=357723&id=128012
🛞 Rollbase Philippin	nes 🗋 Alfresco 🍥 eBIRForms Portal 🗋 U	date via Registrati 🚯 https://www.google 🗋 eFPS Home - eFiling 🏋 JTrac
eBRForms B	ureau of Internal Revenue	Radialitia Lia Internet Scot Pas Schare Provider at BPI Orion Interactive Pred
ane	Republic of the Philippines	
Sidebar	User: Lica Hernandez Soria	(Save) Cancel
 Interactive Forms Nain Menu 	Address Information	• Required
Ny Profile Change Password Update User Profile	Unit / Room Number / Floor Lot # / Block # / Phase # / Building # Building Name Street Name	1 72 Area
Update User Role Errol More Users	Barangay Name Subdivision / Village Province	Apacit S
Tax Software Provider	ZIP Code *	
User Information Post Name: Uca	Contact Information Email Address *	tap@ndescreamy.com Telaphone Number * Port 201001
Middle Name: Herrandez Last Name: Soria	Alternate Email Address	Cellphone Number = [010] [000700
	Security	
	Challenge Question *	What is the name of the street you fract load in?
	Confirm Answer =	
		Line Cincel



6.1.3. How to Change Password

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

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
and and a second se		10000 0000		Contraction of the		I management
		Intera	active Forms Announ	cements		
e .						
ecords to display.						

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

Home-	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
			Secured Governme	nt Login Portal		
		Usernam	0;		1	
		Password	z			
		E Remi Sign Up (ember user name Forgot your password?	Login		
					<u> </u>	



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

eBIRForms ×	CARL CONTRACTOR AND	- Statistics - Statistics	and the second se	Sector States and Sector			- 0 -
> 🗙 👘 🔒 https://ebirfor	ms.bir.gov.ph/prod1/m/main.jsp?a	ppld=158678ctabld=204	47				\$
Rollbase Philippines 📋 Alfresco 🔞	🌶 eBIRForms Portal 🛛 🗋 Update via Regist	ati 🙁 https://www.google	📋 eFPS Home - eFiling.	JT JTrac			
IRForms				licalicalica	Lica Hernandez Soria)	Tax Software Provider at BIR Online Inte	eractive Form
Bureau	J of Internal Reven Republic of the Philippines	ue		• Main Mer	u e Taxpayer	Tax Software Provider	
Sidebar							
E Interactive Forms							
🗃 Main Menu							
My Profile							
Change Password							
Update User Profile							
Update User Role							
Enroll More Users							
i Taxpayer							
Tax Software Provider							
User Information							
rst Name: Lica							
ddle Name: Hernandez st Name: Soria							

4. Click on "Change Password" under the Sidebar.



https://ebirforms.bir.gov.ph/prod1/m/main.jsp?pageId=185381&tabId=20447&ap...



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

Bur	eau of Internal Re Republic of the Philippines	venue	Iscalicatics (Lice Hernandez Soria) Tax Agent & Tax Software Provider at BR Online Interactive Forma
Sidebar			
Interactive Forma	Change Password		Save Cancel
🗟 Main Menu			
My Profile	Password		- Remained
Change Password			Transport of
Update User Profile	Current Password *		
Update User Role	New Password *		
Enroll More Users	Verify New Password *		
ili Taxpayer	Password Requirements	Passwords must be at least 6 characters long. Passwords must include at least 1 numeric or special character.	
B Tax Agent		Passwords are case-sensitive	
Tax Software Provider			Save Cancel
Notifications			
This is a sample notification!			



6.1.4. How to Update User Role

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

	Republic	of the Philippine	senue			
Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
		Intera	ective Forms Announ	cements		
ne						
records to display.						
		D	ownload Forms Contact Us	FAQs		

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

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
		s 🔊	ecured Governme	nt Login Portal		
		Username	t i			
		Password				
		C Reme	mber user name	Login		
		Sign Up [F	orgot your password?			

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

Job Aid for Taxpayers and Accredited Tax Agents



			Logou
• Main Menu	 Taxpayer 	• Tax Agent	• Tax Software Provider
	• Main Menu	• Main Menu • Taxpayer	●Main.Menu ●Taxpayer ●Tax Agent

4. Click on "Update User Role" under the Sidebar.



Job Aid for Taxpayers and Accredited Tax Agents



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

(THE A		Realicatica (Lica Hernandez Soria) Tax Agent à Tax Software Provider at BIR Ontre Interactive For Logor
B	Republic of the Philippines	• Main Menu • Taxpayer • Tax Agent • Tax Software Provide
idebar	User: Lica Hernandez Soria	Save Cano
Interactive Forms		
🗑 Main Menu	Please choose your User Classification if applicable.	
My Profile	20 Aug 400 -	
Change Password	M TAX AGENT	
Update User Profile	GPP/Company (if applicable)	
Update User Role	Accreditation Number # 1234567890	
Enroll More Users		
Taspayer	V TAX SOFTWARE PROVIDER	
Tax Agent		
a Tax Software Provider		
lotifications		Save



6.1.5. How to Enroll More Users

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

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
and and a second se		10000 0000		Contraction of the		I management
		Intera	active Forms Announ	cements		
e .						
ecords to display.						

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

Home =	Login	Sign-up Download For	ms Contact Us	FAQs	BIR Website
Constant III	- Charles and		\sim		
		Secured Cove	roment Login Portal		
		Je Secured Gove	mment Login Portai	2	
		Username:			
		Password.			
		Remember user name Sign Up Forgot your passwo	Login		



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

A https://abirforms.bir.gov.ph/orgd1/m/main/isp2anpld=158578/tabld=20447	(A)
URalitana Dialitanian Di Alfanza 🖉 all'Interna Datal. Di Madatania Banistati 🛄 Internationale Di anne	Mana affina 17 Man
(] housescramppines wiresco @ exercisins routai oposic va regionar mups.//www.google errs Riforms	exone + eming
Bureau of Internal Revenue Republic of the Philippines	Main Menu • Taxpayer • Tax Software Provider
Sidebar	
a Interactive Forms	
🗃 Main Menu	
My Profile	
Change Password	
Update User Profile	
Update User Role	
Enroll More Users	
⊛ Taxpayer	
Tax Software Provider	
User Information	
rst Name: Llos Ióde Name: Henandas	

4. Click on "Enroll More Users" under the Sidebar.





5. Input required information. Click "Save".

H firec	🌒 🛞 User Rollbase Philippine 🗙 🚺		
← → C 🍐 https://eb	pirforms.bir.gov.ph/prod1/m/main.jsp	?pageld=62508&tabld=20447&appld=15867	☆ 📕 🔳
🗋 Rollbase Philippines 📋 4	Alfresco 🍥 eBIRForms Portal 📋 See All		
ISTEAM			licalicalica (Lica Hernandez Sona) Tax Agent & Tax Software Provider at BR Online Interactive Forma
B	Republic of the Philippines	venue	• Main Menu • Taxpayer • Tax Agent • Tax Software Provider
Sidebar	Enroll More Users		Sare
Interactive Forms			
🗃 Main Menu	Enrollment Details * = Required		
My Profile	Login Name *		
Change Password	Email Address .		
Update User Profile	Challenge Question .	- Please select -	
Update User Role			
Enroll More Users	Answer *		
Taxpayer	Castley Annual B		
(i) Tax Agent	Commitmenter		
Tax Software Provider			
Notifications			

- 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.

Login	Sign-up Download Forms	Contact Us	FAQs	BIR Website
			_	
	Secured Governme	ent Login Portal]	
	Username:			
	Password:			
	Sign Up Forgot your password?	Login		
		Username Username Passwort: Remember user name Sign Up Forgot your password?	Secured Government Login Portal Username Passwort Remember user name Sign Up Forgot your password? Login	Secured Government Login Portal Username Passworc Remember user name Sign Up Forgot your password?



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

🛞 eBIRForms ×	
🗲 🔿 C 🐔 🔒 https://ebirforms.bir.gov.ph/prod1/m/main.jsp?appId=15867&tabId=20	47 公:
🔋 Rollbase Philippines 🗋 Alfresco 🌘 eBIRForms Portal 📋 Update via Registrati 🔞 https://www.goo	e 🗋 eFPS Home - eFiling 🎵 JTrac
- Constant	licalicalica (Lica Hernandez Soria) Tax Software Provider at BR Online Interactive Forms
Bureau of Internal Revenue Republic of the Philippines	• <u>Main Menu</u> • Taxpayer • Tax Software Provider
Sidebar	
Interactive Forms	
B Main Menu	
My Profile	
Change Password	
Update User Profile	
Update User Role	
Enroll More Users	
User Information	
First Name: 1 ica	
Middle Name: Hernandez	

4. Click on "My Profile" under the Sidebar.



Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the "Users Enrolled" tab.

CO LIVERAL CO	-			licalicalica (Lica Her	nandez Soria) Tax A	gent & Tax Software	Provider at BIR Online Interactive Form
B	Republic of the	nal Revenue		• <u>Main Menu</u>	 Taxpayer 	 Tax Agent 	Tax Software Provider
Sidebar	User: Lica Hernand	dez Soria					
Interactive Forms							
🗟 Main Menu	User Info Users Enrolled	My Valid Form Types					
My Profile	All Active Users						
Change Password	Active Users 1-2 of 2						
Update User Profile		User Name	Last Login Time	Email Address		Updated	l At
Hodate Hear Pole	Tag as Inactive	maysoria	12/03/2012 11:29 AM	maasoria@indracompany.com		01/02/20	13 06:03 PM
opulate tract Note	Tag as Inactive	user101		maasoria@indracompany.com		01/02/20	13 06:03 PM
Enroll More Users	All Inactive Users						
Taxpayer	Inactive Users None						
Tax Agent	No records to display.						
E Tax Software Provider							
Notifications							
is is a sample notification!							

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 (<u>https://ebirforms.bir.gov.ph</u>).

	Bureau of Republic	Internal Re	evenue	J.		
Home	Login	Sign-up	Download Farms	Contact Us	FAQs	BIR Website
		Intera	active Forms Annour	ncements		
None						
No records to display.						
		D	ownload Forms Contact Us	FAQs		
	bir.gov.ph i	2012 (s under the supervision	Copyright © bir, gov.ph All right of the Information Systems C	is reserved. Group of the Bureau of Inte	mal Revenue.	

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

Home	Login	Sign-up	Download Forms	Contact Us	FAQs	BIR Website
. The local	Login	Side ab	DUVINAN PARTS	Connect Out	TANKA	Last Pressie
		S =	Secured Governme	nt Login Portai	1	
		Username	a:			
		Password	t			
		Sign Up F	mber user name Forgot your password?	Login		
		Dov	wnload Forms Contact Us	FAQs		
		2012 Ci	opyright © bir gov.ph All righ	ts reserved.		



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

				- 6 ×
← → C f ≜ https://ebirforms.bir.gov.ph/prod1/m/main.jsp?appId=158678.tabId=20447				☆ =
📚 Rollbase Philippines 🗋 Alfresco 🛞 eBIRForms Portal 🕒 Update via Registrati 💈 https://www.google 🗋 eFPS Home - eFiling 🏋 JTrac				
BRForms	licalicalica (Lica	Hernandez Soria) T	ax Software Provider at BIR Online Inb	Logout
Bureau of Internal Revenue Republic of the Philippines	• <u>Main Menu</u>	• Taxpayer	• Tax Software Provider	
Sidebar				
⊖ Interactive Forms				
😣 Main Menu				
My Profile				
Change Password				
Update User Profile				
Update User Role				
Enroll More Users				
⊛ Taxpayer				
B User Information				
First Hame: Usa Midde Hame: Hernandez Last Name: Sona				
ttps://ebirforms.bir.gov.ph/prod1/m/main.jsp?pageld=34704&tabld=20447&tapl				

4. Click on "My Profile" under the Sidebar.



Job Aid for Taxpayers and Accredited Tax Agents



5. Click on the "My Valid Form Types" tab.

-		licalicalica (Lica H	lemandez Soria) Tax A	igent & Tax Software	Provider at B#
В	Republic of the Philippines	• Main Mens	• Taxpayer	• Tax Agent	• Tax Sc
Sidebar	User: Lica Hernandez Soria				
Interactive Forms					
🖃 Main Menu	User Info Users Enrolled My Valid Form Types				
My Profile	My Valid Form Types				
Change Password	Form No.				
Unders House Brothe	0605-Sep2003				
Update User Profile	1600-Sep2005				
Update User Role	1600WP-Jan2010				
Enroll More Users	1601C-Jul2008				
(ii) Taxpayer	1601E-Sep2007				
Tax Agent	1601F-Sep2005				
a tax egen	1602-Aug2001				
E Tax Software Provider	1603-Nov2004				
Notifications	1604CF-Jul2008				
- nounceasis	1604E-Jul1999				
This is a sample notification!	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.

Incalicalica (Lica Hemander Soria) Tax Agent & Tax Software Provider at IAF, DE
• Main Menu • Taxpayer • Tax Agent • Tax Software Provider

- 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.

Rollbase Philippines				alvinkeno	ng_test (Alvin Kenr	eth Tan Ong) Tax Ag	ent & Tax Software Provider at IAF_DEV
CONTRACT,							Logout
B	Republic of the Philippines	venue		• Main Menu	• Taxpayer	• Tax Agent	• Tax Software Provider
B Sidebar	Assign Tax Agent Search						
Interactive Forms	Search Tax Agents		-				
🕀 Main Menu		500 740 450 000	-				
Taxpayer	Taxpayer Identification Number	500-7 16- 156-000					
Assign Tax Agent		Format: ###-###-###					
List of Tax Agents			Search				
Remove Tax Agents							
Tax Agent							
Tax Software Provider							
This is a sample notification!							

Job Aid for Taxpayers and Accredited Tax Agents



5. 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	Republic of the Philippine	evenue			ahinkenong • Main Menu	_test (Alvin Kenr • Taxpayer	eth Tan Ong) Tax Age • Tax Agent	ent & Tax Software Provider at IAF_DEV
🗏 Sidebar	Search							
S Interactive Forms	Search Tax Agents							
🛞 Main Menu	-							
⊟ Taxpayer	Taxpayer Identification Number							
Assign Tax Agent		Format: ###-###-###						
List of Tax Agents				Search Clear				
Remove Tax Agents	Search Results							
	Search Results							
Tax Agent	All Available Tax Agents 1-1 of 1							
Tax Software Provider	Search for: Taxpayer Identification Numb	per equals 500-718-158-000						
	♦ <u>Us</u>	er Name	First Name	Middle Name	Last Name	e <u>Ta</u> z	payer Identification	n Number
Notifications	Assign Tax Agent Re	x Paul TA1 Recoter	Rex Paul	TA1	Recoter	500	-718-158-000	
This is a sample notification!								

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

Rollbase Philippines			alvinken	ing_test (Alvin Kenn	eth Tan Orig) Tax Ag	ent & Tax Software Provider at IAF_DEV
B	Republic of the Philippine	sevenue	• Main Menu	• Taxpayer	• Tax Agent	• Tax Software Provider
B Sidebar	New Request					Save Cancel
S Interactive Forms						
Main Menu	Assignment Information * - Required					
Taxpayer	Tax Agent	Rex Paul TA1 Recoter				
Assign Tax Agent						Save
List of Tax Agents						
Remove Tax Agents						
🔳 File Tax Returns						
Tax Agent						
Tax Software Provider						
Notifications						
This is a sample notification!						

7. 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.

Sidebar	Search				
Interactive Forms	Search Tax Agents				
⊞ Main Menu					
Taxpayer	Taxpayer Identification Number				
Assign Tax Agent		Format: ###-###-###			
List of Tax Agents			Search	Clear	
Remove Tax Agents	Search Results				
	Search Results				
Tax Agent	All Available Tax Agents 1-1 of 1				
Tax Software Provider	Search for: Taxpayer Identification Number	equals 500-718-158-000			
	User Name	First Name	Middle Name	Last Name	Taxpayer Identification Number
Notifications	Rex Paul TA1 Recoter	Rex Paul	TA1	Recoter	500-718-158-000
This is a sample notification!					
		Request "[12/15/2012 03:0) PMI - Alvin Kenneth Tan O	ng" 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.

tollbase Philippines	licalicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue Republic of the Philippines	Lagant • Main Menu • Taxpayer • Tax Agent • Tax Software Provider
B Sidebar	
B Interactive Forms	
🗟 Main Menu	
My Profile	
Change Password	
Update User Role	
Enroll More Users	
B Taxpayer	
Assign Tax Agent	
List of Tax Agents	
Remove Tax Agents	
File Tax Returns	
Submitted Tax Returns	
File Using 3rd	
Party Application	Trojan Virus Internet access

- 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.

B	ureau of Internal Revenue Republic of the Philippines			licalicalica (Lica Hemandaz Sole) Tax • Main Menu • Taxpayer • Tax Agent	Agent & Tax Software Provider at IAF_DEV
🗉 Sidebar	Remove Tax Agent				
E Interactive Forms	Associated Tax Agents				
🕀 Main Menu	Taxnaver's Associations: 1-2 of 2				
Taxpayer		Association	Taxpayer	Tax Agent	Status 🔺
Assign Tax Agent	Association to Tax Agent				
List of Tax Agents	Remove Tax Agent	ELAINE GAZMEN TALOSIG	Lica Hernandez Soria	ELAINE GAZMEN TALOSIG	Assigned
Remove Tax Agents	Remove Tax Agent	Alvin Kenneth Tan Ong	Lica Hernandez Soria	Alvin Kenneth Tan Ong	Assigned
File Tax Returns					
Tax Agent					
I Tax Software Provider					
Notifications					

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



 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).

enneh Tan Ong
Are you sure you want to delete the selected Tax Agent from your list? OK Cancel

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

Sidebar	Remove Tax Agent				
Interactive Forms	Accounted Tax Boosts				
🛞 Main Nenu	Taxpaver's Associations: 1-1 of 1				
B Taxpayer	00	Association	Taxpayer	Tax Agent	Status 🔺
Assign Tax Agent	Association to Tax Agent				
List of Tax Agents	Remove Tax Agent	ELAINE GAZMEN TALOSIG	Lica Hernandez Soria	ELAINE GAZMEN TALOSIG	Assigned
Remove Tax Agents					
File Tax Returns					
I Tax Agent					
I Tax Software Provider					
Notifications					
This is a sample notification!					
		Action "Remove Tax Agent" has been	performed on "Alvin Kenneth Tan Ong".		

8. Email will be sent to Tax Agent informing them that taxpayer has chosen to severe 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.

Rollbase Philippines	licalicalica (Lica Hemandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue Republic of the Philippines	• Main Menu • Taxpayer • Tax Agent • Tax Software Provider
≅ Sidebar	
Interactive Forms	
🖯 Main Nenu	
My Profile	
Change Password	
Update User Role	
Enroll More Users	
Assign Tax Agent	
List of Tax Agents	
Remove Tax Agents	
🕀 File Tax Returns	
Submitted Tax Returns	
File Using 3rd Party Application	Trojan Virus

- 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.

Bu	Republic of the Philippines			• Main M	enu • Taxpayer • Tax Agent	Logout	
😑 Sidebar	Tax Agents						
Interactive Forms Itain Menu	Associated Tax Agents Texpayer's Associations 1-8 of 8						
Taxpayer	00	Association		<u>.5</u>	tatus A		Е
Assign Tax Agent	Association to Tax Agent						
List of Tax Agents		ELAINE GAZMEN TALOSIG		A	signed		
Remove Tax Agents	Approve	aaa aaa aaa			a bereach Approval		
File Tax Returns		Alvin Kenneth Tan Ong		Ri	emoved		
Tax Agent	Representation of a Taxnaver	Angelica Hernandez Soria		н	emoved		
Tax Software Provider		ELAINE GAZMEN TALOSIG		R	emoved		
Notifications	Pending Requests						
	Taxpayer's Pending Requests						
This is a sample notification!	Taxpayer's Pending Requests 1-1 of 1						
	Request	Taxpayer	Tax Agent	Date Sent	Days Before Request will Lapse	Status Actions	
	Association to Tax Agent						
	[12/11/2012 02:08 PM] - Lica Hernandez Soria	Lica Hernandez Soria	Alvin Kenneth Tan Ong	12/11/2012	6	For Confirmation	-

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

Job Aid for Taxpayers and Accredited Tax Agents



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

Rollbase Philippines	reau of Internal Revenue Republic of the Philippines	Heaticalina (Lica Hemanica Soria) Tax Agent & Tax Software Provider at LAF_DEV Loganit Main Menu
🗟 Sidebar	Association: ELAINE GAZMEN TALOSIG	
Interactive Forms		
Main Menu		
Taxpayer	Status Accionant	
🖲 Tax Agent	Date of Representation 12/11/2012	Edit Forms
I Tax Software Provider		
Notifications	Assignment Information Tax Agent Inquiry ELAINE GAZMEN TALOSIG	Tax Agent TIN 306-679-758-000
This is a sample notification!	List Of Assigned Forms	
	0005-Sep2003	
	☐ 1600/P-Jan2310 ☐ 1601C-Jul2008	

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

2000OT-Jun2006	
2200A-May2006	
2200AN-Oct2002	
2200M-Oct2002	
2200P-Sep2005	
2200T-May2008	
2550M-Feb2007	
2550Q-Feb2007	
✓ 2551Q-Feb2002	
2553-Jul1999	
	Save



6.2.4. How to File Offline to Online

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

Kapawaran penanakai Payment Form 0605 Kawanihan ng Rentas Internas Souther (CS)	
1 for the ^C Calmed C Fiscal 3 Guetter 4 Date Date DAte DAte CONTYNY 5 His of Sheek Altached 6 Δ[] 2 Your Sheek Data/OVYYYY Tat ^C She C field C Attached 6 Δ[] FP010 12 - December ± 2012 0 FP010	
7 Return Period (MM / DD / 04 04 2012 8 Tax Type CG	
PartI Background Information	
9 Taxpayer Identification No. 10 RDO Code 11 Taxpayer Classification 12 Line of Business/Occupation	
456 789 123 000 005 - C I C N INFORMATION TECHNOL	
13 Taxpayer's Name (Last Name, First Name, Middle Name for Individuals) //Registered Name for Non-Individuals) DELA CRUZ, JUAN 14 Telephone Number 5785432	
15 Registered Address 16 Zip Code [57 PUROK 6 BRANGAY MASLANG, QUEZON CITY 1111	
17 Manner of Payment 18 Type of Payment	
Voluntary Payment Per Audit/Delinquent Account C Installment	
Balf-Assessment C Pellminary/Final Assess/Darkiewy Tax No. Officialization C Paralimetrial Control Assess/Darkiewy Tax C Paralimetrial Control Assess/Darkiewy Tax C Paralimetrial Control Assess/Darkiewy Tax C Paralimetrial Control Assessment C Paralimetrial Control Assessessment C Paralimetrial Control Assessment C Paralimetri	
Part II Computation of Tax	
19 Exel TaxDeposit/Advance Payment 19 100,000,00 20 Add: Forestites Surdarge Interest Standard Surdarge Interest Compromise	
20A 0.00 20B 0.00 20C 0.00 20D 0.00	
21 Total Amount Payable(Sum of Items 19 & 200) 21 100,000.00	
C Pre-approved by Investigating Office	
Validate Edit Submit Save Print Final Comy	

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

1 For the Calendar C Fircal	3 Quarter	4 Due Date (MM/DD/YYYY)	5 No. of Sheets Attached	ember 2003(ENCS) 6 ATC
Year Ended (MMVYYYY) 12 - December 2012	C 1st @ 2nd C 3r	rd C 4th 04 04 2012	0	FP010
7 Return Period (MM / DD /	04 04 201	2 8 Tax Type	G	
Part I		Background Inform	ation	
9 Taxpayer Identification No.	10 RDO Code	11 Taxpayer Classification	12 Line of Business	s/Occupation
456 789 123 000	005 👻	©I CN	INFORMATION	N TECHNOL
13 Taxpayer's Name (Last Name, First N DELA CRUZ, JUAN	ame, Middle Name for Individua	als) /(Registered Name for Non-Individuals)	14 Telephone Number	er 32
17 Manner of Payment			f Payme	ent
Manner of Payment Voluntary Payr Self-Assessment Penalties Tax Deposit/Advance Paymen Income Tax Second Installime Others(Specify)	Validation succ	xesful. Click on Edit if you wish to modify	y your entries. OK	ent Istallment Int
Manner of Payment Voluntary Payr Self-Assessment Penalties Tax Deposit/Advance Paymen Income Tax Second Installme Others(Specify) Part II	Validation succ	essful. Click on Edit if you wish to modify	y your entries. OK	ent Istallment Int
17 Manne of Payment Voluntary Payr © Self-Assessment © Panatiuse © Tax Deposit/Advance Paymen © Income Tax Second Installine © others(Specify) Part II 9 Basic TaxOeposit/Advance Payme 20 Ads: Penatiis Surdhage	Validation succ	estful. Click on Edit if you wish to modify Computation of Tax Computation	yyour entries. OK 19 19	ent Istallment Int
17 Manne of Payment Voluntary Payr © self-Voluntary Payr © second second installine cothers(Specify) Part II 19 Baic TaxObjoost/Advance Payme 20 Add Penalities Storbarg 20A	et Interest	estful. Click on Edit if you wish to modify Computation of Tax Componiate	yyour entries. OK 19 ment 2 ayme ment 19 200	ent istallment ent 100.000.00 0.00
17 Monee of Payment Voluntan Payr © Self-Assessment: Panalles © Tasc Daposit/Advance Paymen © Internet Tasc Beood Installine © Others/Searchy Part II 19 Beals Tax Daposit/Advance Payme Sorthage 20A C C 21 Total Ansout Payasite(Jum of Iter	Validation succ	estful. Click on Edit if you wish to modify Computation of Tax Computation 200 Componia	yyour entries. OK 19 ment 0 min 19 ment 19 20 20 21	ent istallment int 100,000.00 0.00 100,000.00
17 Monee of Paymet Voluntary Payr Solf-Assessment Voluntary Payr Tax Deposit/Advance Paymer Income Tax Second Installine Others(Specify) Part II 19 Bails Tax/Deposit/Advance Payme 20 Act Pensiles Zota/meurol Payales(Jon of Item	Validation succ	estful. Click on Edit if you wish to modify Computation of Tax 0.00 20C	yyour entries. OK 19 00 200 21 21 21	ent istallment int 100,000.00 0.00 100,000.00

- 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.

Job Aid for Taxpayers and Accredited Tax Agents



Rollbase Philippines					lica	alicalica (Lica	a Hernandez Soria) Tax A	Agent & Tax Soff	ware Provider at IAF_DE
B	Republic of the Philippines	venue			• Main Menu	• Taxp	ayer 🔹 Tax Ager	nt • Tax S	oftware Provider
Sidebar	Form: 12/14/2012 06:13 PM -	Lica Hernandez Soria	ı						Continue
Interactive Forms									
B Main Menu	Return Form Information	0605 Sep2003			Drie	t Drawiow	Drint Draview		
My Profile	Taxnaver	Lica Hernandez Soria			FII	iling Date	12/14/2012 06:13 PM		
Change Password	FRN (Filing Reference Number)	12-12-01-01-001174-006	-1						
Update User Role	This form has been successfully filed								
Enroll More Users									
Taxpayer	Preview								
Tax Agent	Validation successful.								
Tax Software Provider									
Notifications							BIB Form No		
This is a sample notification!	۲	Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas Interna		Pa	yment Form		0605		
	1 For the 6 2 Year Endec 12 - Det	Calendar C Fiscal (MM/YYYY) cember 2012	3 Quarter	C 3rd C 4th	4 Due Date (MM/DD/YYYY) 04 04 2012	5 No. of 5	September 2003	6 ATC FP010	

- 12. System will display FRN page.
- 13. Click **PRINT** button to print FRN page. Click **CANCEL** button to go back to the form screen.

Burea	u of Internal Revenue Republic of the Philippines	icali Main Menu	alica (Lica Hernan Taxpayer	dez Soria) Tax Agen Tax Agent	L& Tax Software Provider at IAF_DEV
😑 Sidebar		Republic of the Philippines			
Interactive Forms	1	BUREAU OF INTERNAL REVENUE			
🕀 Main Menu					
My Profile		FILING REFERENCE NO.			Form No. 0605-Sep2003
Change Password					
Update User Role	Filing Reference Number	12-12-01-01-001174-006-1			
Enroll More Users	TIN	456-789-123-000			
Taxpayer	RDO	005			
Tax Agent	Return Period				
Tax Software Provider	Tax Due	100,000			
	Penalty	0			
Alexidianations	Total Amount Pavable	100,000			1

Print Cancel



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.

Rollbase Philippines	Healicalica (Lica Hemandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue Republic of the Philippines	Lagend • Main Menu • Taxpayer • Tax Agent • Tax Software Provider
🗟 Sidebar	
Interactive Forms	
🗟 Main Menu	
My Profile	
Change Password	
Update User Role	
Enroll More Users	
Assign Tax Agent	
List of Tax Agents	
Remove Tax Agents	
🗟 File Tax Returns	
Submitted Tax Returns	
File Using 3rd Party Application	Trojan Virus

- 3. Click on **FILE USING 3RD 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).

A CONTRACTOR OF THE OWNER		Incancarica (Lica Menandez Sona) Tax Agent & Tax Sontware Provider # 142-USY Logoot
Bu	Republic of the Philippines	• Main Menu • Taxpayer • Tax Agent • Tax Software Provider
🗟 Sidebar	File BIR Forms using 3rd Party Application	Upload Cancel
Interactive Forms	Discuss selects and fits to be unloaded from units semantics	
🗉 Main Menu	Upload * C:/Users/AlvinOng/Des Browse	
🗄 Taxpayer	(YOZI KO mar)	
Assign Tax Agent	7	Upload Cancel
List of Tax Agents		
Remove Tax Agents		
🕀 File Tax Returns		
Submitted Tax		
Returns		
File Using 3rd Party Application		
🕀 Tax Agent		



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.

Rollbase Philippines	licalicalica (Lica Hemandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue Republic of the Philippines	Logout ● Main Menu ● Taxpayer ● Tax Agent ● Tax Software Provider
🗟 Sidebar	
Interactive Forms	
B Main Menu	
My Profile	
Change Password	
Update User Role	
Enroll More Users	
Assign Tax Agent	
List of Tax Agents	
Remove Tax Agents	
🐵 File Tax Returns	
Submitted Tax Returns	
File Using 3rd	
Party Application	Trojan Virus Internet access

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.

																_
Rollbase Philippines	Republic	nternal Revenu	е							• Main Menu	licalical	ica (Lica Her (payer	• Tax Agent • Tax	x Software Pro Software P	vider at IAF_DEV	* III
Sidebar	Submitted Tax I	Returns														
Interactive Forms	Submitted Tax	Returns - All My Forms 1-41 of 41														
Main Nenu	Attach	Attachments	Form	Browse	Upload	Upload Error	Form Error	Connection Error	Is Duplicate	Form TIN Not Fo	und	Taxpayer	Tax Software Provide	r Updated At	FRN (Filing Refs	al I
B Taxpayer Assign Tax Agent	2003-5011000	NOTICE OF TERMINATION.jpg 12/06/2012 04:39 PM	05/12/2012 16:57 - Lica Hernandez Soria	Submit Return TXT.txt (4 KB)								Lica Hernande Soria	z	12/13/2012 03:11 AM	12-12-31-01-000	n
Remove Tax Agents	2551M-Sep200	5	12/14/2012 01:52 PM - Lica Hernandez	Submit Return TXT.txt (3 KB)							¥	Lica Hemande Soria	z	12/14/2012 01:55 PM	12-12-28-01-00	11
Returns File Using 3rd Party Application	Attach File]	12/14/2012 01:39 PM - Lica Hernandez Soria	Submit Return TXT.txt (3 KB)					¥			Lica Hernande Soria	z	12/14/2012 01:42 PM		
Tax Agent Tax Software Provider	Attach File]	12/14/2012 10:01 AM - Lica Hernandez Soria	Bubmit Return TXT.txt (3 KB)			•					Lica Hernande Soria	z	12/14/2012 10:01 AM		
Notifications	Attach File]	12/14/2012 09:59 AM - Lica	Submit Return						✓				12/14/2012 09:59 AM		





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.

Rollbase Philippines	licalicalica (Lica Hemandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue Republic of the Philippines	● Main Menu ● Taxpayer ● Tax Agent ● Tax Software Provider
🗇 Sidebar	
Interactive Forms	
@ Main Menu	
B Taxpayer	
🕀 Tax Agent	
Represent Taxpayer	
List of Taxpayers	
Remove Taxpayers	
(#) File Tax Returns	
® Tax Software Provider	
S Notifications	
This is a sample notification!	

- 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.

Rollbase Philippines			alvinkenor	ng_test (Alvin Kenn	eth Tan Ong) Tax Age	ent & Tax Software Provider at IAF_DEV
Rollbase Philippines akinkenong_test (Akin Kenneth Tan Ong) Tax Agent & Tax Software Main Menu • Taxpayer • Tax Agent • Tax Software • Main Menu • Taxpayer •	• Tax Software Provider					
B Sidebar	Represent Taxpayer Search					
Interactive Forms	Search Taynayors					
🖲 Main Menu	Automotion_gress (Aubit Remeth Tan Ong) Tax Agent & Tax Software Provider II // CV Encount Republic of the Philippines * Main Menu • Taxpayer • Tax Agent • Tax Software Provider * Represent Taxpayer Search Sort Taxpayers * Cranagers Taxpayers Taxp					
⊟ Tax Agent						
Represent Taxpayer						
List of Taxpayers						
Remove Taxpayers						
Tax Software Provider						
Notifications						
This is a sample notification!	Main Menu • Taxpayer • Tax Agent • Tax Software Provider Represent Taxpayer Search Tarpayers T77-282-675-000 Format: ####################################					

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

tollase Philippines	Ireau of Internal Rever Republic of the Philippines	nue			iicalid • Main Menu • T	allica (Lica Hernandez Soria) Tax a axpayer • Tax Agent	Agent & Tax Software Provider at UAF_DEV
Sidebar	Search						
Interactive Forms	Gearch Taynayore						
🛞 Main Menu	Scarch Taxpayers						
Taxpayer	Taxpayer Identification Number						
Tax Agent		Format: ###-###-###					
Represent Taxpayer			[Search]	Clear			
List of Taxpayers	Search Results						
Remove Taxpayers							
File Tax Returns	Search Results						
III Tax Software Provider	Search for: Taxpayer Identification Number ec	uals 777-262-675-000					
Notifications	Represent Taxpayer	User Name Rosanna TA1 San Vicente	First Name Rosanna	Middle Name TA1	Last Name San Vicente	Taxpayer Identification 777-262-675-000	n Number
This is a sample notification!							

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

New Request New Request Tapager Information Tapager Republic of the Philippines Republic of the Ph					
epublic of the Philippines	nue	• Main Menu	 Taxpayer 	 Tax Agent 	 Tax Software Provider
w Request					Save Cancel
er Information					* = Required
Taxpayer	Rosanna TA1 San Vicente				
					Save Cancel
	w Request er Information Tappyer	vr Information Tappyer Rosanna TA1 San Vicente	wr Request wr Information Texpager Rosanna TA1 San Vicente	wr Request er Information Tarpager Rosanna TA1 San Yicente	w Request er Information Tarpayer Rosanna TA1 San Vicente

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.





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.

Hase Philippines		licalicalica (Lica H	emandez Soria) Tax	Agent & Tax Software Provider at IAF_DEV		
Bureau of Int Republic of t	ternal Revenue the Philippines	• Main Men	u • Taxpayer	• Tax Agent	Tax Software Provider	
🗟 Sidebar						
Interactive Forms						
🗷 Main Menu						
* Taxpayer						
🕀 Tax Agent						
Represent Taxpayer						
List of Taxpayers						
Remove Taxpayers						
File Tax Returns						
I Tax Software Provider						
Notifications						
This is a sample notification!						

- 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.

Rollbase Philippines					licalicalica (Lica H	emandez Soria) Tax	Agent & Tax Software Provider at IAF_DEV
B	Republic of the Philippines			• Main Menu	 Taxpayer 	• Tax Agent	Tax Software Provider
Sidebar	Remove Taxpayer						
Interactive Forms							
🛞 Main Menu	Associated laxpayers						
Taxpayer			Iaxoaver			Status 🔺	
🗏 Tax Agent	Representation of a Taxpayer						
Represent Taxpayer		Remove Taxpayer	333 333 333			Assigned	
List of Taxpayers							
Remove Taxpayers							
File Tax Returns							
Tax Software Provider							
Notifications							

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



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

Rollbase Philippines		licalicalica (Jos Hernandez Soria) Tax Agent & Tax Sorbarav Provider	at IAF_DEV
B	Republic of the Philippines	● Main Menu ● Taxpayer ● Tax Agent ● Tax Software Provi	der
🗟 Sidebar	Lica Hernandez Soria: Remove Taxpayer	(Yes	No
Interactive Forms			
Main Menu	Confirm Deletion		
Taxpayer	Taxpayer ass ass		
🖻 Tax Agent	Notice of Termination * (1004 K8 ma)		
Represent Taxpayer		Yes	No
List of Taxpayers			
Remove Taxpayers			
File Tax Returns			
Tax Software Provider			
Notifications			
This is a sample notification!			

- 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 severe their association.

Lica Hernandez Soria: Remove Taxpayer		
	Message from webpage	
Confirm Deletion Taxpayer sas	Are you sure you want to delete the selected Taxpayer from your list?	
(1024		
	OK Cancel	

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 10th 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.

Rollbase Philippines	licalicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF_DEV
Bureau of Internal Revenue	Logout
Republic of the Philippines	main menu iaxpayer tax Agent iax Sonware Provider
🕾 Sidebar	
Interactive Forms	
🛞 Main Menu	
® Taxpayer	
🖼 Tax Agent	
Represent Taxpayer	
List of Taxpayers	
Remove Taxpayers	
🛞 File Tax Returns	
(# Tax Software Provider	
© Notifications	
This is a sample notification!	

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

					li	calicalica (Lica Hernar	ndez Soria) Tax	Agent & Tax Software Provider at IAF_D
Bu	Republic of the Philippines				♥ Main Menu	• Taxpayer •	Tax Agent	Tax Software Provider
Sidebar	Taxpayers							
Interactive Forms								
Main Menu	Associated Taxpayers							
Taxnaver	Tax Agent's Associations 1-4 of 4							
R Tex found	Taxpayer Representation of a Taxpayer				Status *			
tax sigen	aaa aaa aaa				Assigned			
Represent Taxpayer	Angelica Hernandez Soria				For Deletion Approval			
List of Taxpayers	222 222 223				Removed			
Remove Taxpayers	333 333				Removed			
File Tax Returns								
Tax Software Provider	Pending Requests							
	Tax Agent's Pending Requests							
Notifications	Tax Agent's Pending Requests 1-1 of 1							
	Request	Taxpayer	Tax Agent	Date Sent	Days Before Request will Lap	se Status	Actions	
s is a sample notification!	Association to Tax Agent							
	[12/11/2012 03:20 PM] - Alvin Kenneth Tan Ong	Alvin Kenneth Tan Ong	Lica Hernandez Soria	12/11/2012		6 For Confirmation	Accept A	issociation Reject Association



6.2.10. How to File Offline to Online for a Taxpayer

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

ine freip	Government Property no	1101
	Republic approximations Republic approximation and a second sec	
	1 Forms Calescentor Facal 3 calester 4 box Date (MARDOWYYY) 5 ths of Sheets Attached 6 Δ(C) 2 Value Exceld (MARYYYY) 1 fits 6 did	
	7 Return Period (MM / 0D / 04 04 2012 8 Tax Type CG	
	Part I Background Information	
	9 Taxpayer Identification No. 10 RDO Code 11 Taxpayer Classification 12 Line of Business/Occupation	
	456 789 123 000 005 • C I C N INFORMATION TECHNOL	
	13 Taxpayer's Name (Last Name, Fist Name, Middle Name for Individuals) /Registered Name for Non-Individuals) 14 Telephone Number DELA CRUZ, JUAN 5785432	
	15 Registered Address [67 PUROK 6 BRANGAY MASLANG, QUEZON CITY [111]	
	17 Manner of Payment 18 Type of Payment	
	Voluntary Payment Per Audit/Delinquent Account C Installment	
	event for event constraintent constrainttent constraintent constraintenttent constraintenttent constraintenttent constraintenttent constraintenttent constraintenttent constraintenttent constraintenttenttenttenttenttenttenttenttentte	
	Income ray decore unsummeric (morrower) Others(Specify)	
	Part II Computation of Lax	
	19 Basic Tex/Deposit/Advance Payment 19 100,000.00 20 Add: Penalties Substage Interest Componies	
	20A 0.00 20B 0.00 20C 0.00 20D 0.00	
	21 Total Amount Payable(Sum of Items 19.8 20D) 21 100,000.00	
	Pre-approved by Investigating Office Not approved by Investigating Office	
	Validate Edit Submit Save Print Final Copy	

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

Kagawaran ng Pananalap Kawanihan ng Rentas Inte	i mas	Payment Form	0605 September 2003(ENCS)	
1 For the Calendar C Fiscal 2 Year Ended (MMYYYY) 12 - December 2012	3 Quarter C 1st C 2nd C 3rd	C 4th 04 04 2012	5 No. of Sheets Attached 6 ATC 0 FP010	
7 Return Period (MM / DD /	04 04 2012	8 Tax Type CG		
Part I		Background Informa	tion	
9 Taxpayer Identification No.	10 RDO Code	11 Taxpayer Classification	12 Line of Business/Occupation	
456 789 123 000	005 👻	GI CN	INFORMATION TECHNOL	
13 Taxpayer's Name (Last Name, First Nam DELA CRUZ, JUAN	ne, Middle Name for Individuals)	(Registered Name for Non-Individuals)	14 Telephone Number 6785432	
17 Manner of Payment Voluntary Paym Self-Assessment C Penalties	A Validation success	ful. Click on Edit if you wish to modify	your entries. ent o. of Installment Payment	
C Tax Deposit/Advance Paymen C Income Tax Second Installme C Others(Specify)	_		OK	
C Tax Deposit/Advance Paymen C Income Tax Second Installine C Others(Specify) Part II		Computation of Tax	OK	
C Tax Deposit/Advance Paymen C Income Tax Second Installme Deters(Specify) Part II 19 Basic Tax/Deposit/Advance Payment 20 Add: Penalties Surcharge	Interest	Computation of Tax	19 100.000.00	
Tax Deposit/Advance Payment Income Tax Second Installed Others(Specify) Part II Basic TaxDeposit/Advance Payment 20 Add: Penalities Surdharge 20A 0 0 0	Interest 200	Computation of Tax	19 100.000 00	
Tas Deposit/Advance Payment Income Tax Second Installment others(Specify) Part II Basic TaxDeposit/Advance Payment Zo Adc Penalities Surdraige 20A 00 21 Total Amount Payable(Sum of Items	Interest 200 208 -	Computation of Tax Compromise	00 00 00 00 00 00 00 00 00 00 00 00 00	
C Tako Depart/Advance Paymen C Income Tax Second Installing Others(Specify) Part II 19 Balic Tax/Depart/Advance Payment 20 Add Pressine 20 A 00 21 Total Amount PayableSium of Items C Tax-Departory Balances	10 20B 19 200 1000 1000 1000 1000 1000 1000 10	Computation of Tax Compromise	19 100 000 00 0 00 200 00 10 000 00 10 000 00 10 000 00 10 000 00 10 000 00 0	
C Tako Dapasit/Advance Payment C Income Taka Second Installing Others(Specify) Part II 19 Biac Fracklesont/Advance Payment 20 Act Fracklesont Advance Sudding 20 C Pre-approved 5 C Pre-approved 5	Interest 0 20B 19 & 20D 19 & 20D 19 & 20D 19 & 20D 19 & 20D 19 & 20D 10 & 20D	Computation of Tax Composite 0.00 20C		

- 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.

Job Aid for Taxpayers and Accredited Tax Agents



Rollbase Philippines		
A INTERNAL		licalicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF_DE Logout
Bu	Republic of the Philippines	• Main Menu • Taxpayer • Tax Agent • Tax Software Provider
Sidebar	Form: 12/14/2012 06:13 PM - Lica Hernandez Soria	Continue
Interactive Forms		
B Main Menu	Form Type 0605-Sen2003	Print Preview
My Profile	Taxpayer Lica Hernandez Soria	Filing Date 12/14/2012 06:13 PM
Change Password	FRN (Filing Reference Number) 12-12-01-01-001174-006-1	
Update User Role	This form has been successfully filed.	
Enroll More Users	·····, ·····, ·····,	
Taxpayer	Preview	
Tax Agent	Validation successful.	
Tax Software Provider		
Notifications		
This is a sample notification!	Republika ng Pilipinas Kagawasan ng Pananalapi Kawanihan ng Rentas Internas	Payment Form 0605
	1 For the @ Calendar @ Fiscal 3 Quark 2 Year Ended (MMYYYY) 12 - December 2012	Base C and C bes Description Distribution Distribution <thdistribution< th=""> Distribution <thdistribu< td=""></thdistribu<></thdistribution<>

- 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	Republic of the Philippines	licalicalica (Lica Hemandez Soria) Tax Agent & Tax Software Provid Main Menu Taxpayer Tax Agent Tax Software F							
∃ Sidebar	Republi	c of the Philippines							
Interactive Forms	BUREAU OF	INTERNAL REVENUE							
Main Menu									
My Profile	FILING	REFERENCE NO.			Form No. 0605-Sep2003				
Change Password									
Update User Role	Filing Reference Number	12-12-01-01-001174-006-1							
Enroll More Users	TIN	456-789-123-000							
Taxpayer	RDO	005							
Tax Agent	Return Period								
Tax Software Provider	Tax Due	100,000							
	Penalty	0							
Notifications	Total Amount Payable	100,000							
This is a sample notification!									

Print Cancel



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.

base Philippines	licalicalica (Lica Hernandez Soria) Tax Agent & Tax Software Provider at IAF
Bureau of Internal Revenue	Logo
Republic of the Philippines	
-	
Sidebar	
Interactive Forms	
Main Menu	
Taxpayer	
🗟 Tax Agent	
Represent Taxpayer	
List of Taxpayers	
File Tax Returns	
Buty Englishing	
SUDMITTED Tax	
suomiteed tax Returns	

- 3. Click on **FILE USING 3RD 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).

Rollbase Philippines		Itealiteatilea (Lica Hernandez Soria) Tax Agent & Tex Software Provider at IAF_DEV
Bu	Republic of the Philippines	Main Menu * Taxpayer * Tax Agent * Tax Software Provider
🗟 Sidebar	File BIR Forms using 3rd Party Application	Upload Cercel
Interactive Forms	Please select xml file to be unloaded from your computer	
🛞 Main Menu	Upload * C:Users/AlvinOng/Des Browse	
I Taxpayer	(Text Holmer)	
🖂 Tax Agent		Upicad Verice
Represent Taxpayer		
List of Taxpayers		
Remove Taxpayers		
File Tax Returns		
File Using 3rd		
Submitted Tax		
Returns		
Tax Software Provider		
 Notifications 		



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.

Rollbase Philippines	reau of Internal Revenue	licalicalica (Lica Hernandez Sona) Tax Agent & Tax Borhane Pro						
	Republic of the Philippines	• Main Wenu	 Taxpayer 	 Tax Agent 	• Tax Software Provider			
Sidebar								
Interactive Forms								
🖲 Main Menu								
Taxpayer						1		
🗃 Tax Agent								
Represent Taxpayer								
List of Taxpayers								
File Tax Returns								
Party Application								
Submitted Tax								
Returns						-		
Tax Software Provider								
Notifications								

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

Rollbase Philippines	reau of I	nternal Revenu	e						•1	Main Menu	• Taxpayer	Hemandez Soria) Tax	Agent & Tax Software Pro	vider at IAF_DEV	•
	Republic	of the Philippines													
Sidebar	Submitted Tax F	leturns													
Interactive Forms	Submitted Tax	Returns - Forms Filed By Me 1-40 o	f 40												
Main Menu	Attach	Attachments	Form	Browse Up	load Uplo	ad Error	Form Error	Connection Error	Is Duplicate For	m TIN Not Four	nd <u>Taxpa</u>	yer <u>Tax Software</u>	Provider Updated At	FRN (Filing Refe	2
Taxpayer	2003-3011000	NOTICE OF TERMINATION.jpg	05/12/2012	Submit							Lica		12/13/2012	12-12-31-01-000	a l
😑 Tax Agent		12/06/2012 04:39 PM	16:57 - Lica Hernandez	Return TXT.txt (4							Hema Soria	ndez	03:11 AM		
Represent Taxpayer	055411 00001		Soria	NB)											
List of Taxpayers	Attach File)	12/14/2012	Buhmit							🖌 Lica		12/14/2012	12-12-28-01-001	1
Remove Taxpayers		1	01:52 PM - Lica	Return TXT txt (3							Herna Soria	ndez	01:55 PM		
🕀 File Tax Returns			Hernandez Soria	KB)											
File Using 3rd	Attach File]	12/14/2012 01:39 PM	📄 Submit					✓		Lica	ndez	12/14/2012 01:42 PM		
Party Application			Lica Hernandez	Return TXT.txt (3							Soria		01.42114		
Submitted Tax			Soria	KB)											
Returns	Attach File		12/14/2012 10:01 AM -	Submit Return			~				Lica Herna	ndez	12/14/2012 10:01 AM		
Tax Software Provider			Lica Hernandez Soria	TXT.txt (3 KB)							Soria				
Hotifications	Attach File] aneId=36499.8tabId=15397.8vid	12/14/2012	Submit						~			12/14/2012 09:59 AM		



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 <u>https://ebirforms.bir.gov.ph</u> 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 <u>https://ebirforms.bir.gov.ph</u>.

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.



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?d

- 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 <u>https://ebirforms.bir.gov.ph</u>

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• Go to the BIR website at <u>www.bir.gov.ph</u>. 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)?

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

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
- 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
- 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
- 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.



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.