

## Bureau of Internal Revenue



# Job Aid for the Use of Offline eBIRForms Package



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# 1. Project Overview

## 1.1. Background

The Electronic Bureau of Internal Revenue Forms (eBIRForms) is an e-service of the Bureau of Internal Revenue (BIR) that provides taxpayers with an alternative mode of preparing and filing tax returns that is easier and more convenient.

Instead of the conventional manual process of filling up tax returns on pre-printed forms, taxpayers can download the Offline eBIRForms package from BIR eServices website. Using the Offline eBIRForms package, taxpayers and Accredited Tax Agents (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 encoded information. After filling out the forms, taxpayers/ATAs can submit it through the Online eBIRForms System.

# 2. Definition of Terms and Acronyms

## 2.1. Definition of Terms

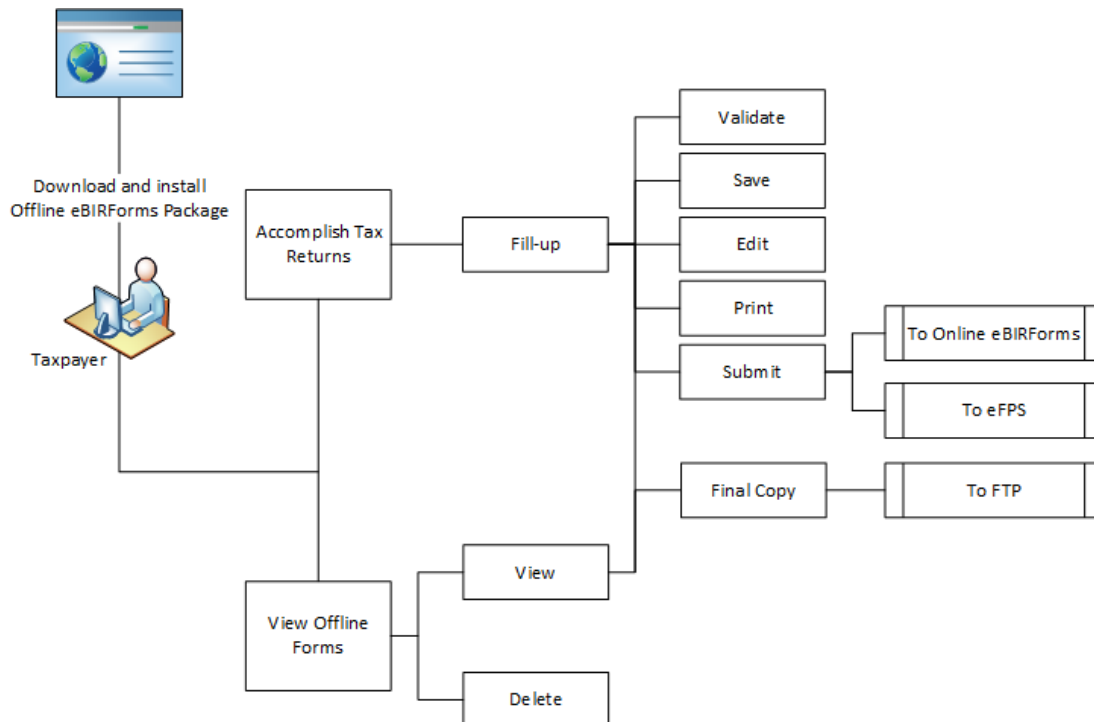
Term	Definition
<b>Offline</b>	Activity is accomplished while individual is not connected to the internet
<b>Online</b>	Activity is accomplished while individual is connected to the internet
<b>Manual filing</b>	Taxpayer fills up and submits tax return to AAB, RDO/ RCOg
<b>Electronic filing (in reference to the use of the eBIRForms)</b>	Taxpayer use electronic form of filing tax return.

## 2.2. Acronyms

Term	Definition
<b>AAB</b>	Accredited Agent Bank
<b>eBIRForms</b>	Electronic Bureau of Internal Revenue Forms
<b>eFPS</b>	Electronic Filing and Payment System
<b>OTC</b>	Over-the-Counter
<b>PDF</b>	Portable Document Format
<b>RCO</b>	Revenue Collection Officer
<b>RDO</b>	Revenue District Office
<b>TP</b>	Taxpayer
<b>ATA</b>	Accredited Tax Agent
<b>TSP</b>	Tax Software Provider
<b>XML</b>	Extensible Markup Language. Output file generated by the Offline eBIRForms package

### 3. Features of eBIRForms

#### 3.1. System Overview



System Modules	Description
<b>Accomplish Tax Returns Module</b>	<p>This module allows users to accomplish form/s even without internet connection. The forms validate user inputs. Likewise, mathematical computations are seamlessly provided to minimize time and erroneous computations in filling out forms.</p> <p>Users can also 'Validate', 'Save' and 'Print' their accomplished forms.</p> <p>Upon validation of the form, users can 'Edit', 'Submit, or save a 'Final Copy' of the accomplished forms.</p>
<b>View Offline Forms Module</b>	<p>This module allows users to view or delete all the existing offline forms that the user created/modified.</p> <p>Users can also 'Validate', 'Save' and 'Print' their accomplished forms.</p> <p>Upon validation of the form, users can 'Edit', 'Submit' or save a 'Final Copy' of the accomplished forms.</p>



### 3.2. What is 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.

### 3.3. What is Online eBIRForms System?

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

### 3.4. 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.

### 3.5. 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

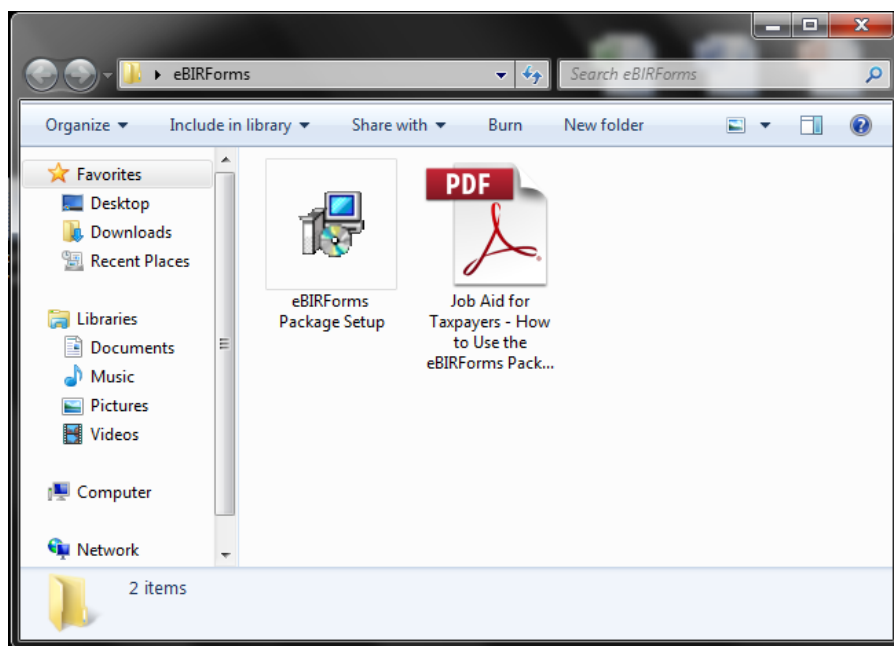


## 4. How to Use the Offline eBIRForms Package

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

#### 4.1.1. If you have internet access

1. Download the Offline eBIRForms package from any of the following website:
  - a. [www.bir.gov.ph](http://www.bir.gov.ph)
  - b. [www.bir.gov.ph/index.php/eservices/ebirforms.html](http://www.bir.gov.ph/index.php/eservices/ebirforms.html)
  - c. [www.knowyourtaxes.ph](http://www.knowyourtaxes.ph)
  - d. [www.dof.gov.ph](http://www.dof.gov.ph)
  - e. Dropbox
2. Save the zipped file in your computer.
3. Unzip the contents of the zipped file. This will contain the following files:
  - a. eBIRForms Package installer (eBIRForms Package Setup.exe)
  - b. Job Aids on How to Use the eBIRForms Package

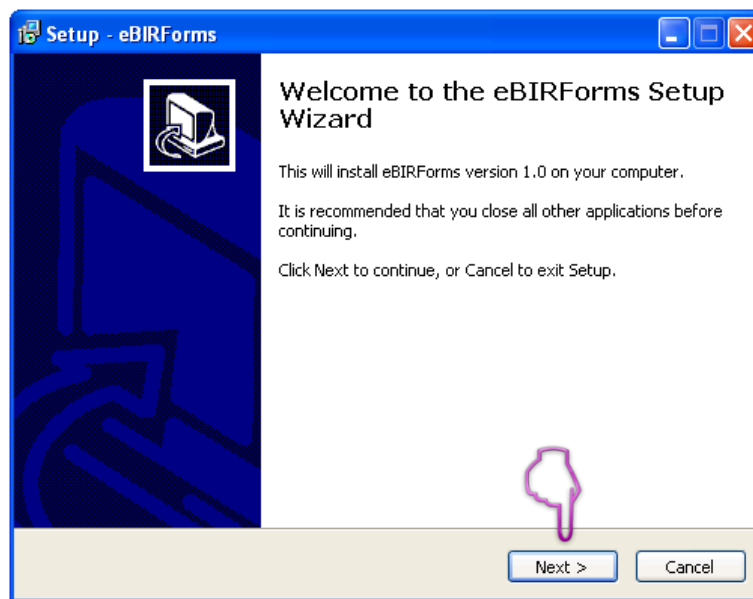


4. Click on the eBIRForms Package Setup.exe icon to start setup of the eBIRForms Package.

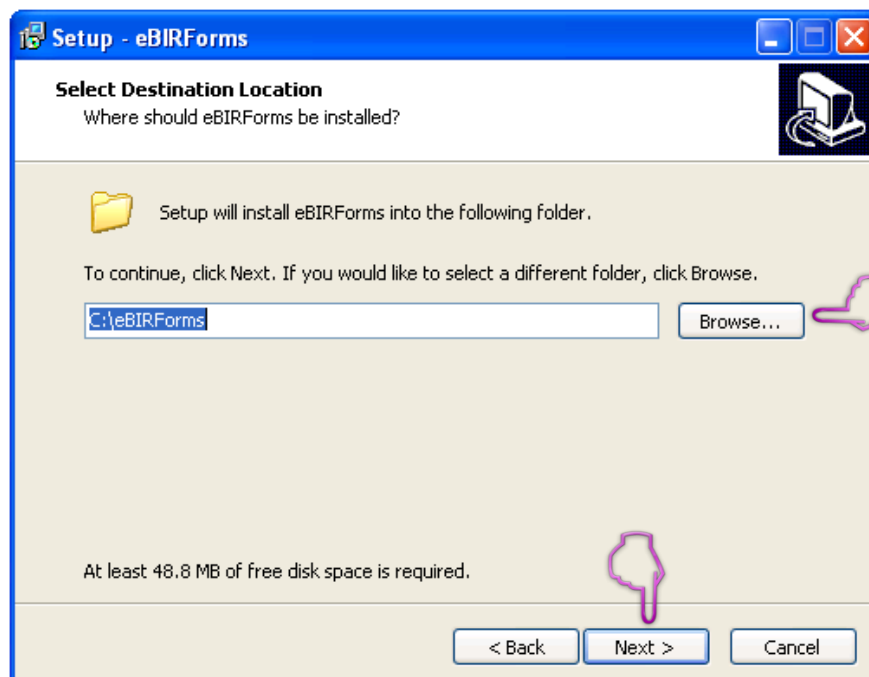




5. Click 'Next.'

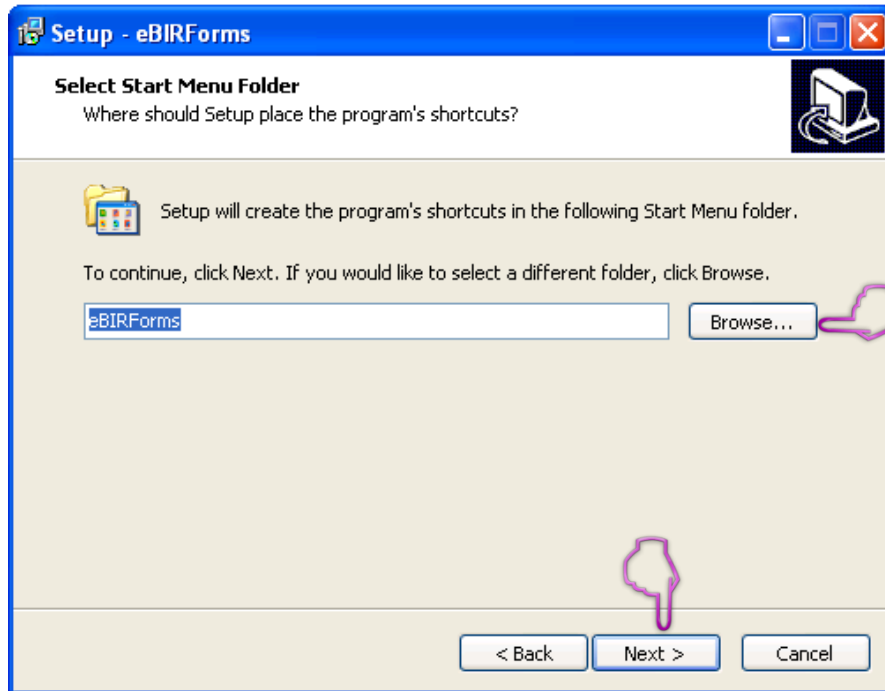


6. Click 'Browse' to select the location folder for the eBIRForms Package (default is drive C). Then click 'Next.'

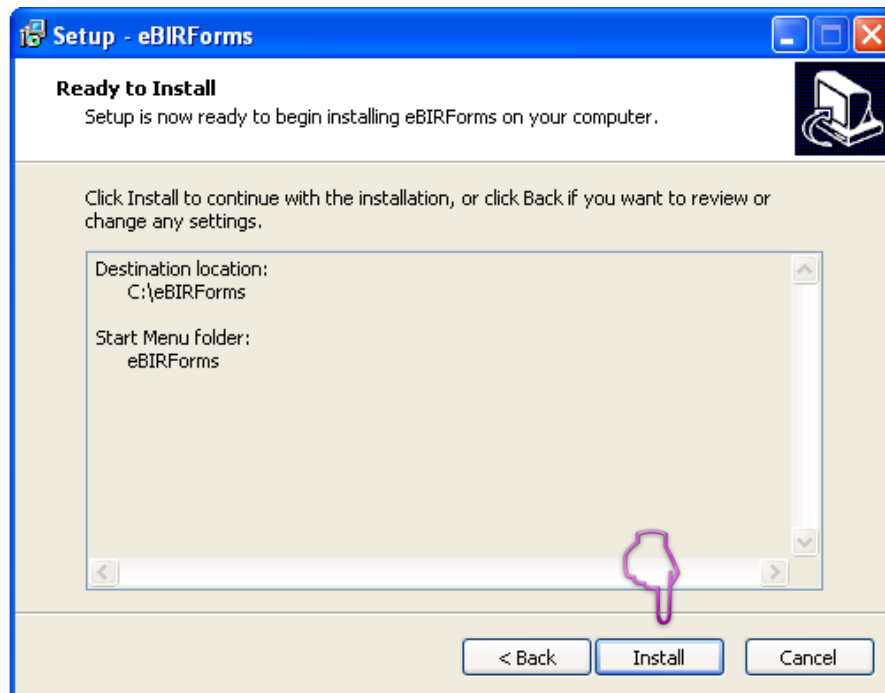




- Click 'Browse' to select the location of the eBIRForms Package shortcut (default is Start Menu folder). Then click 'Next.'

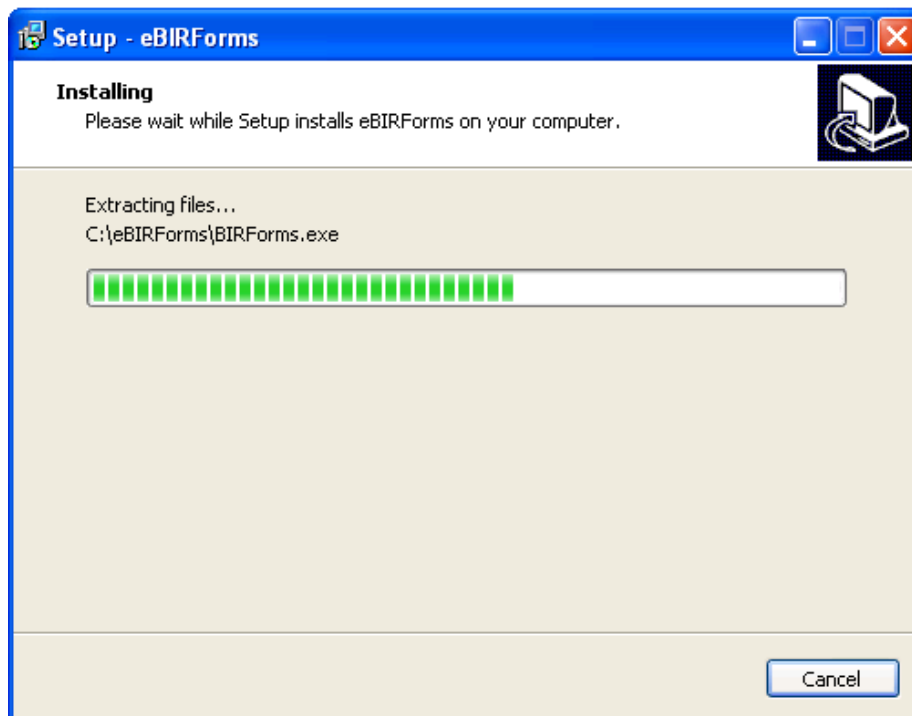


- Click 'Install.'

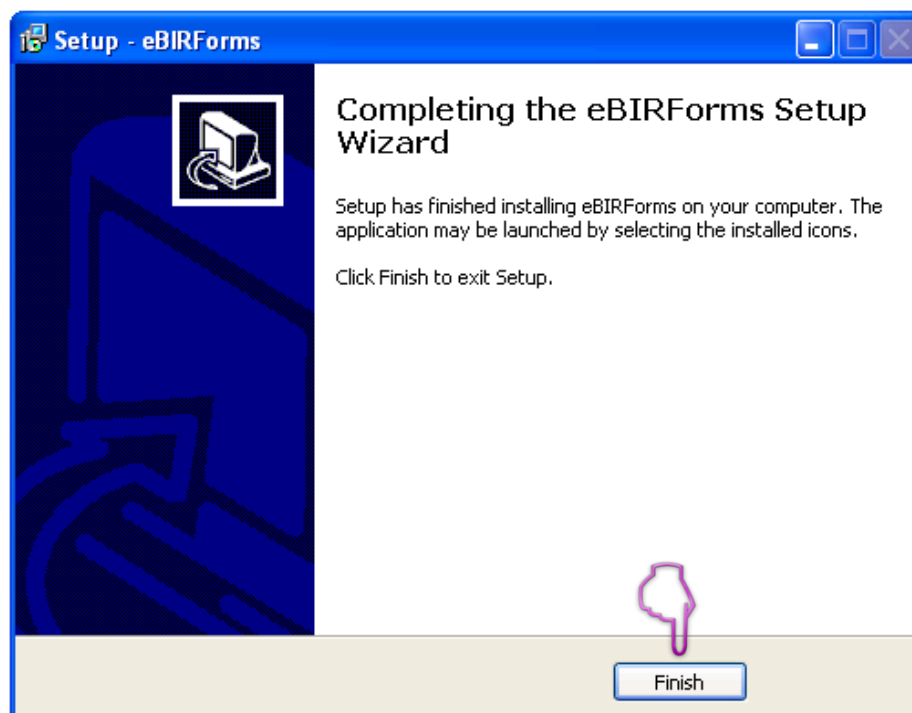




9. The following dialog box is displayed after clicking the 'Install' button.

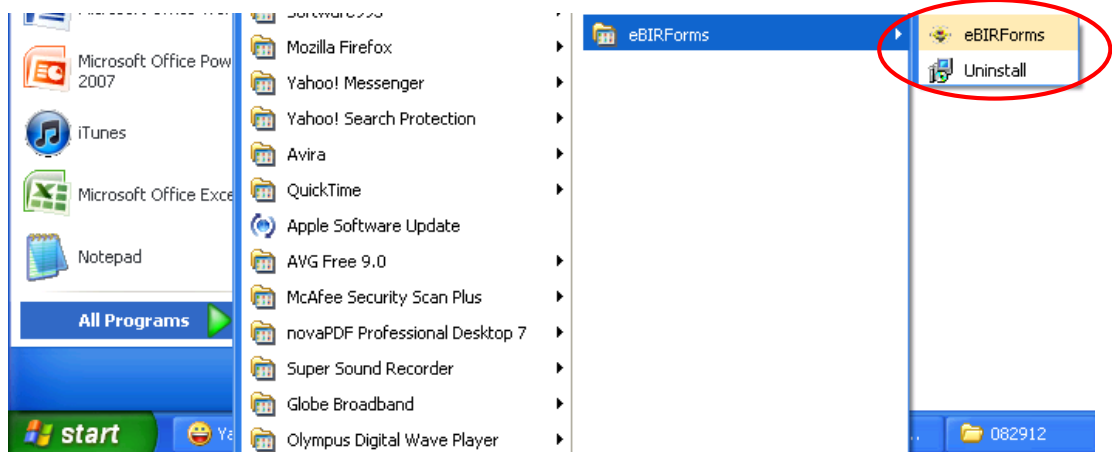


10. Click 'Finish' to complete the installation.





11. 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).



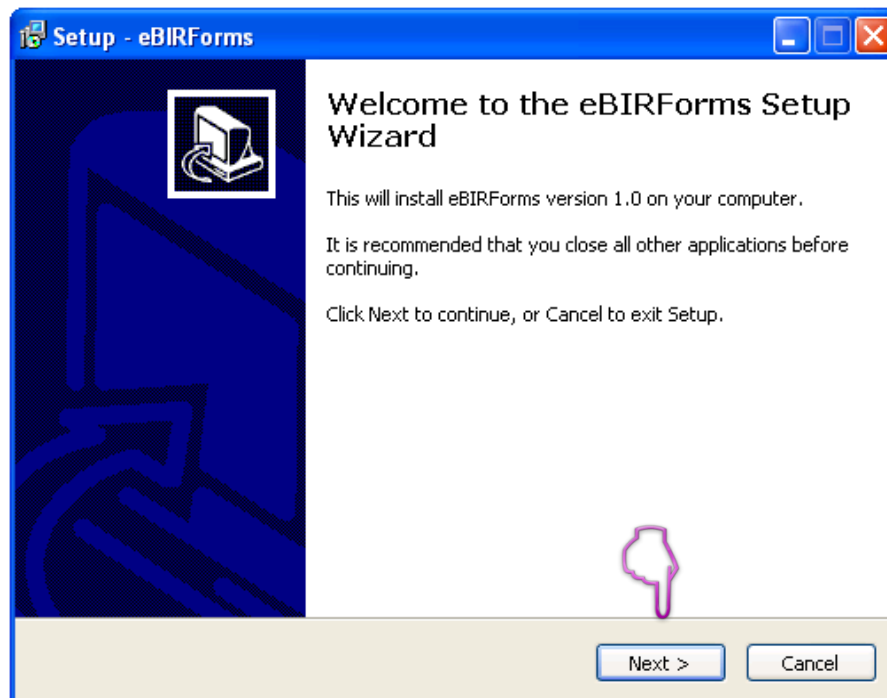


#### 4.1.2. If you do not have internet access

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.

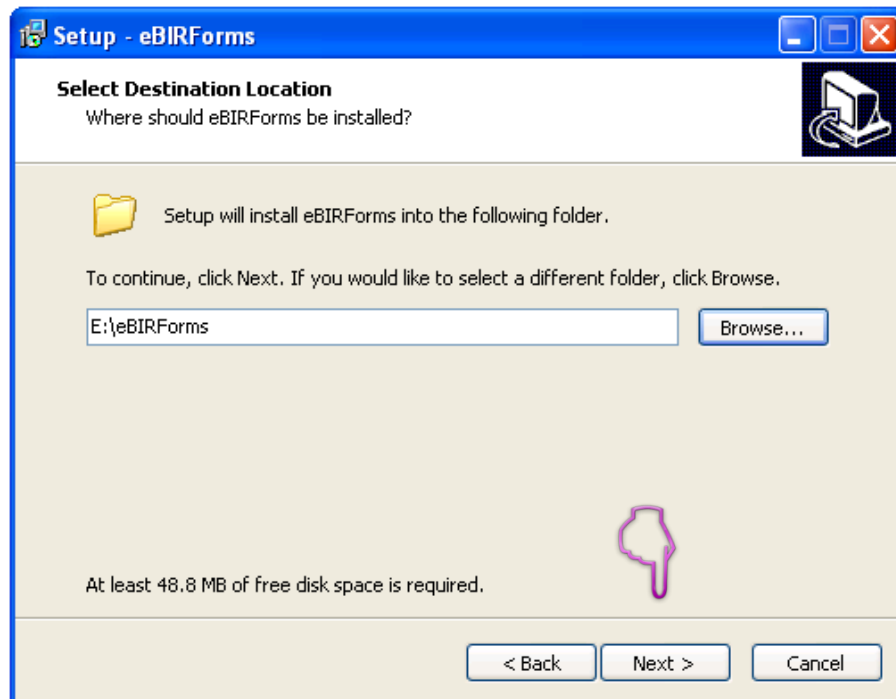


3. A message window will appear. Click 'Next.'

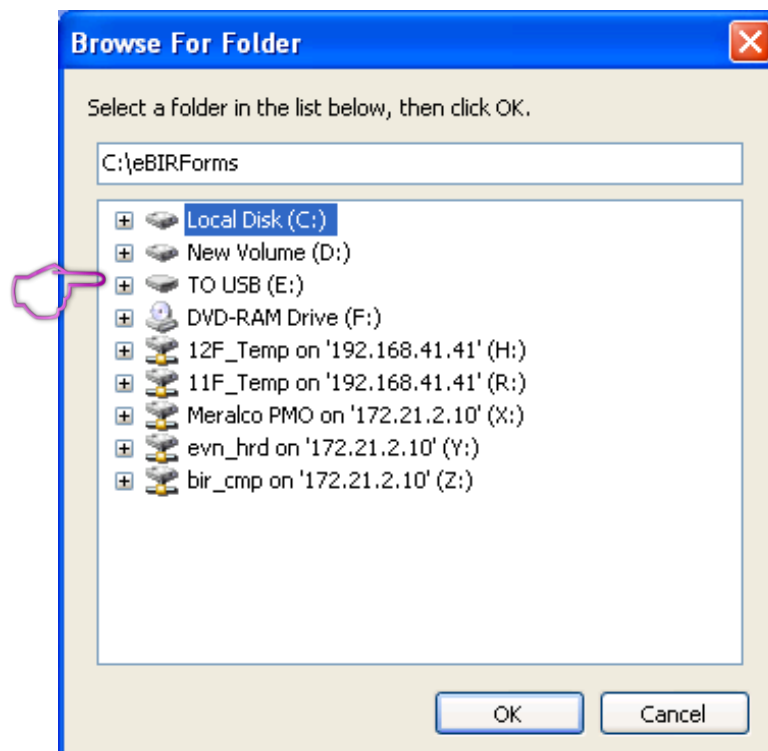




- Click on 'Browse' to look for the drive location of your USB flash drive (default is drive C).

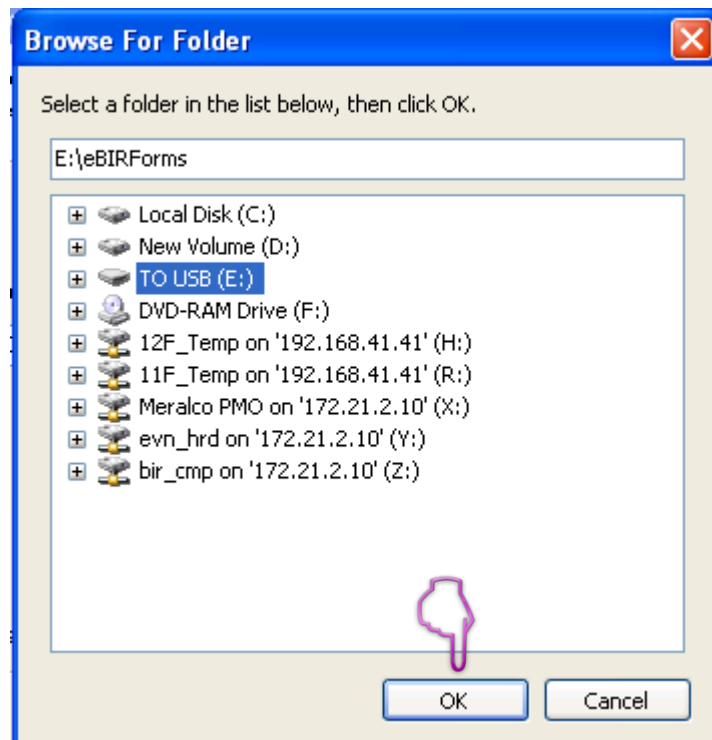


- Select the USB folder or drive from the list displayed.

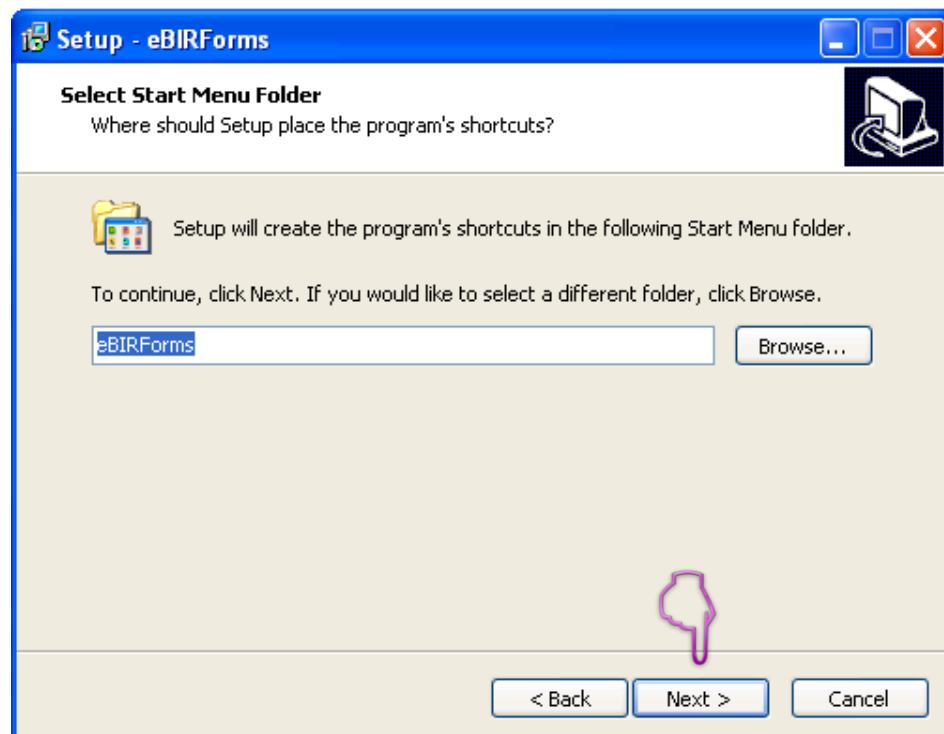




6. After selecting the USB drive, click 'OK.'

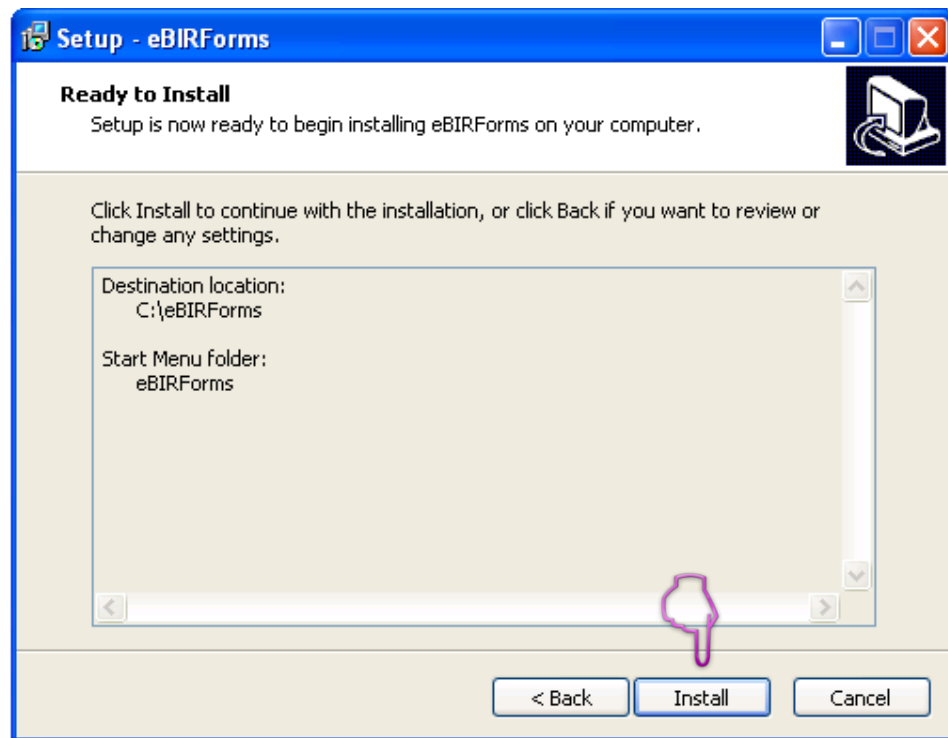


7. Click 'Browse' to select the location of the eBIRForms Package shortcut (default is Start Menu folder). Then click 'Next.'

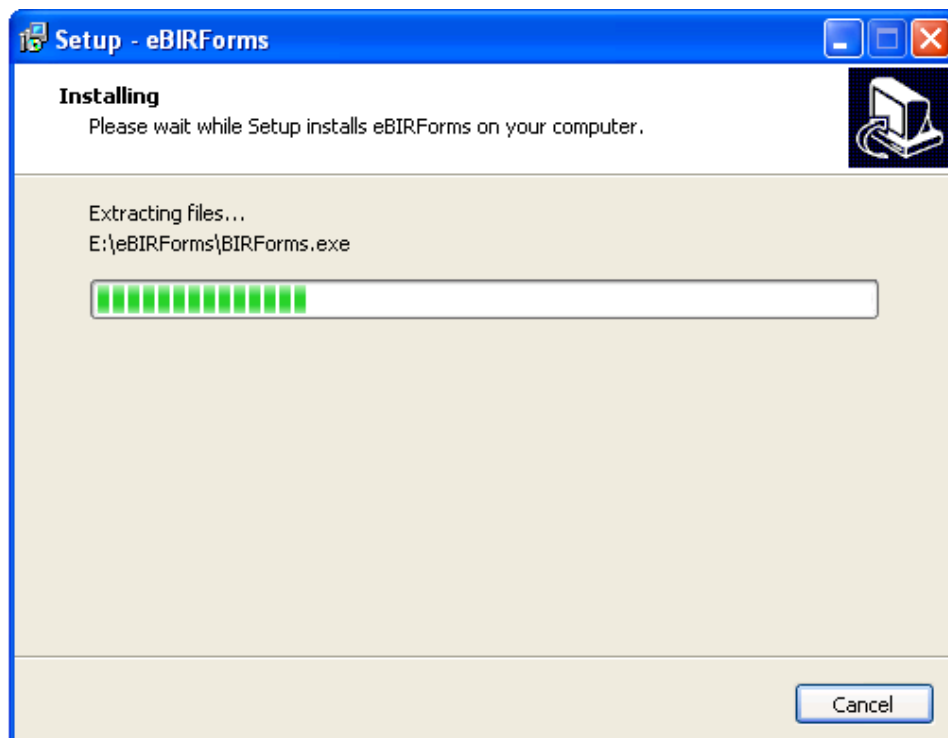




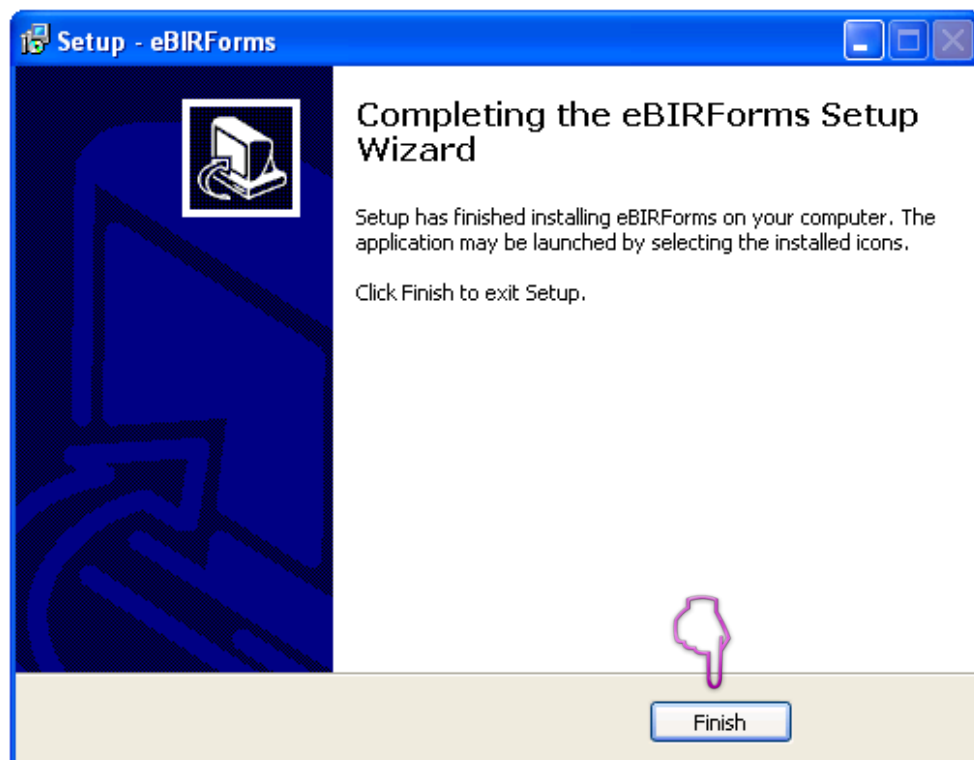
8. Click 'Install.'



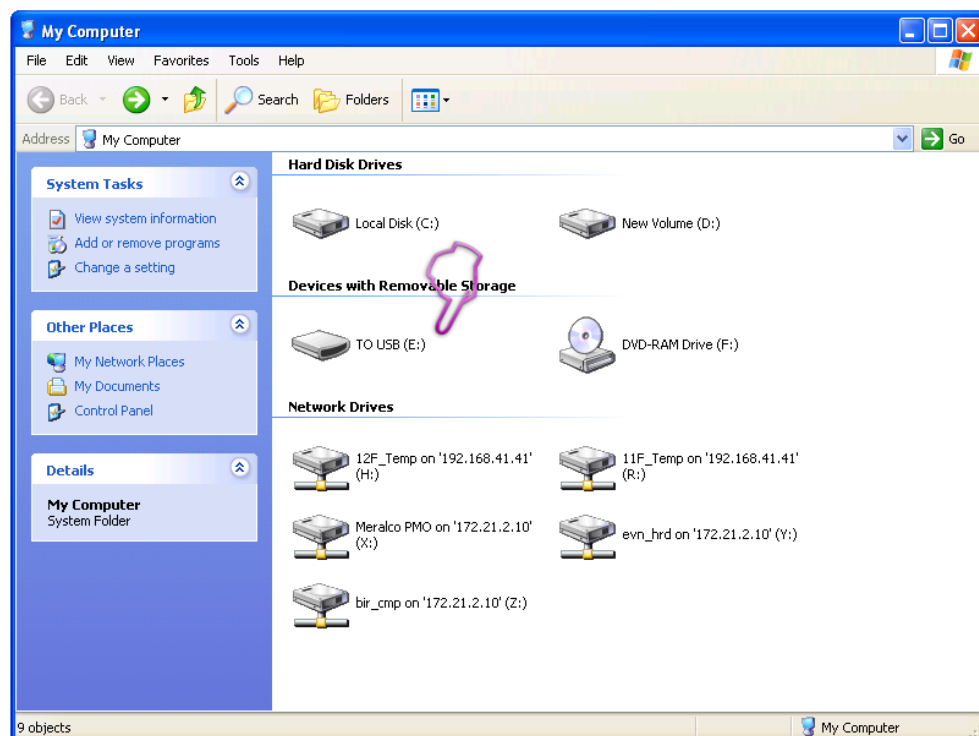
9. The following dialog box is displayed after clicking the 'Install' button.



10. Click 'Finish' to complete the installation.

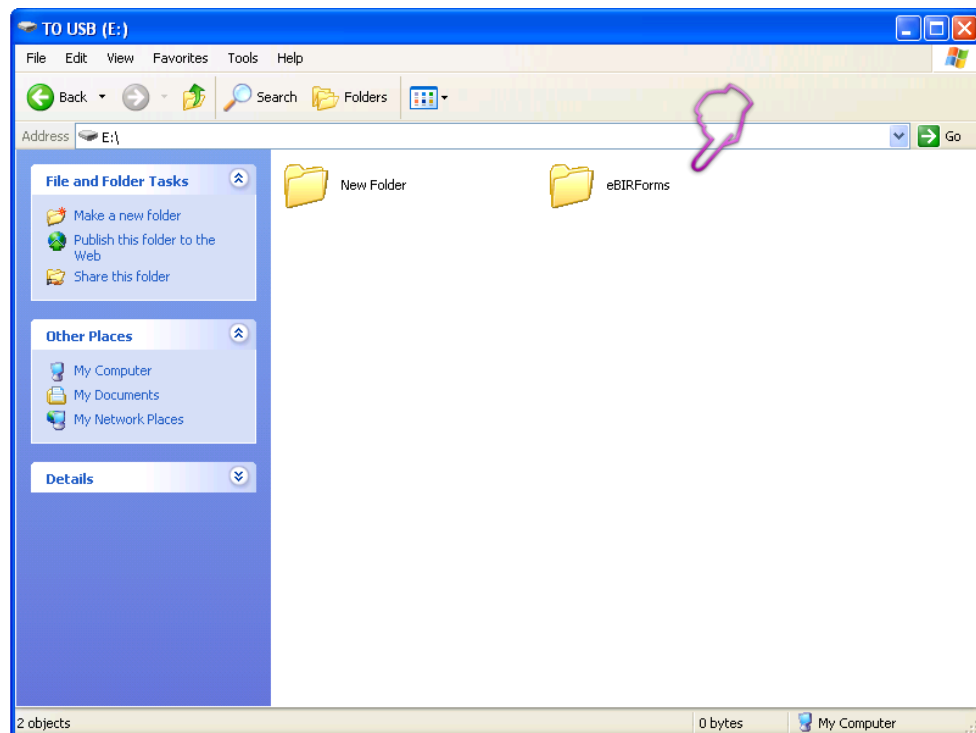


11. Go to My Computer, then click on the USB drive.

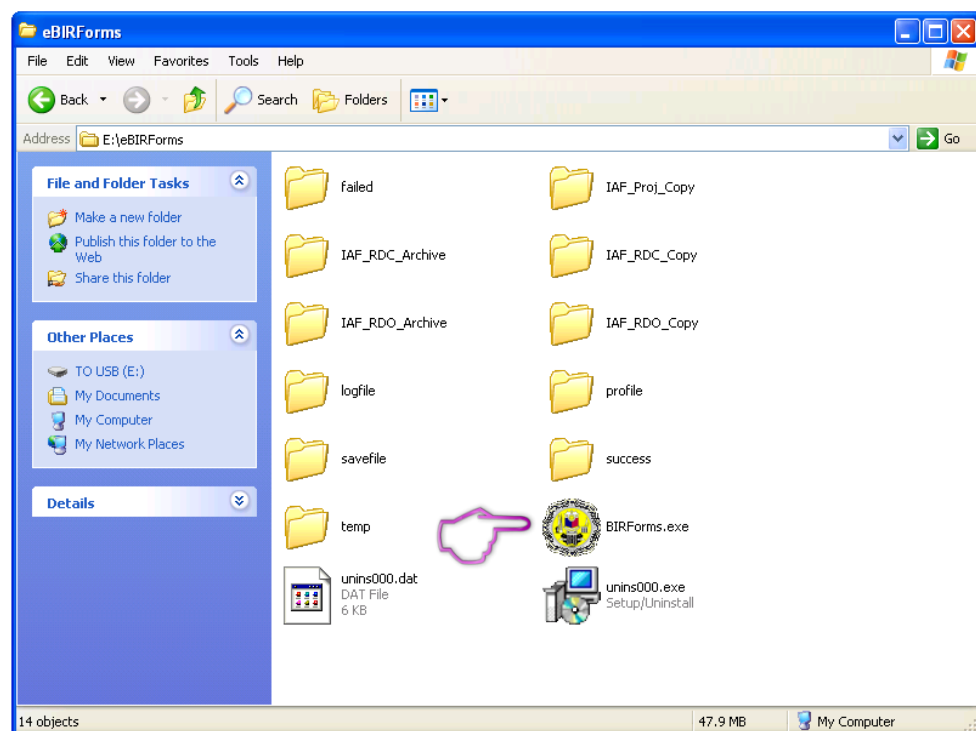




12. Double-click the eBIRForms folder to view the files located inside.



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

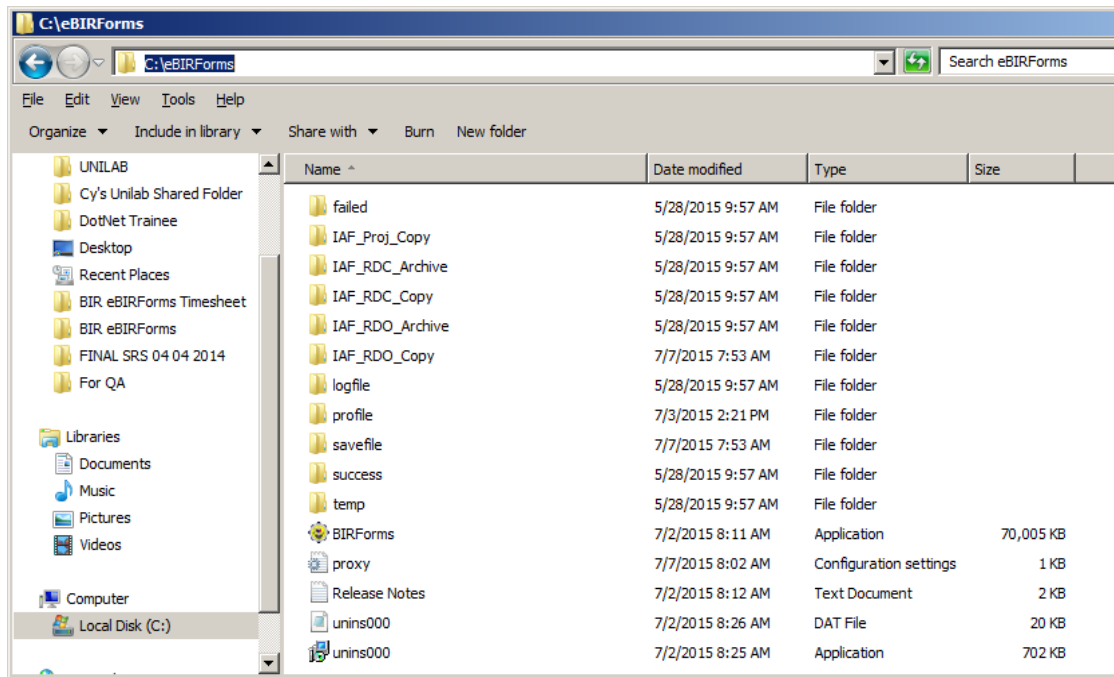




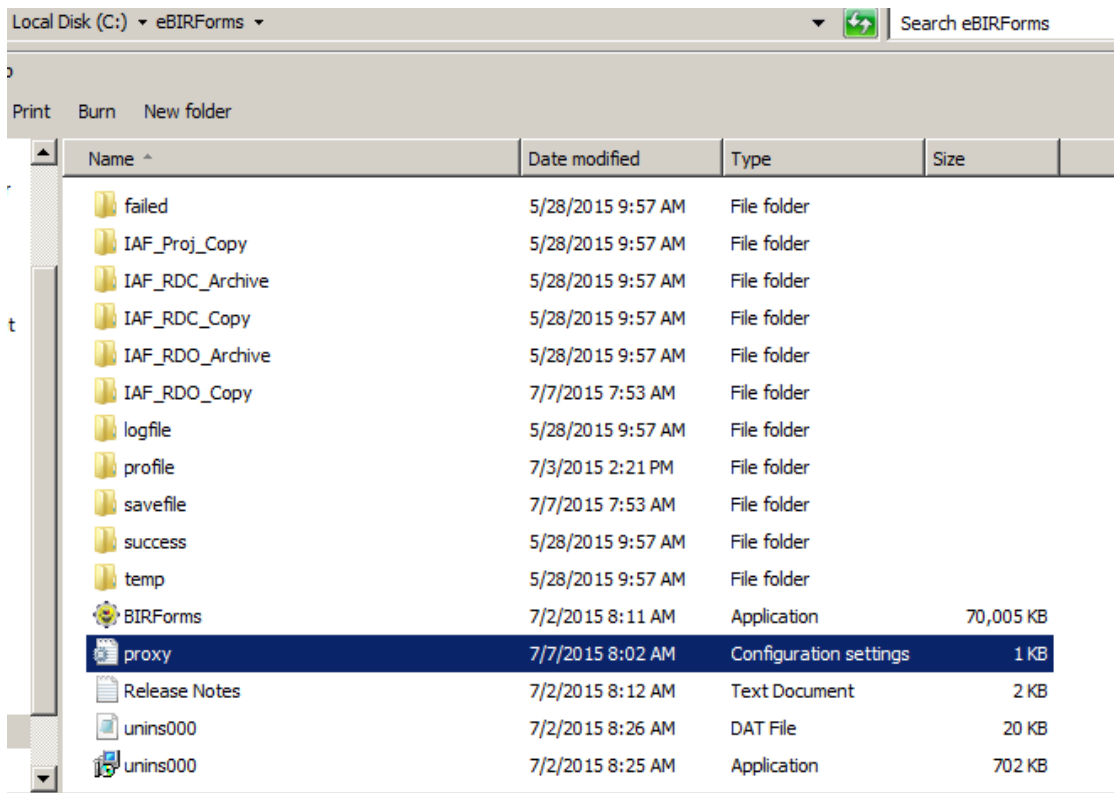


### 4.1.3. How to configure Proxy setting

1. Go to C:\eBIRForms folder

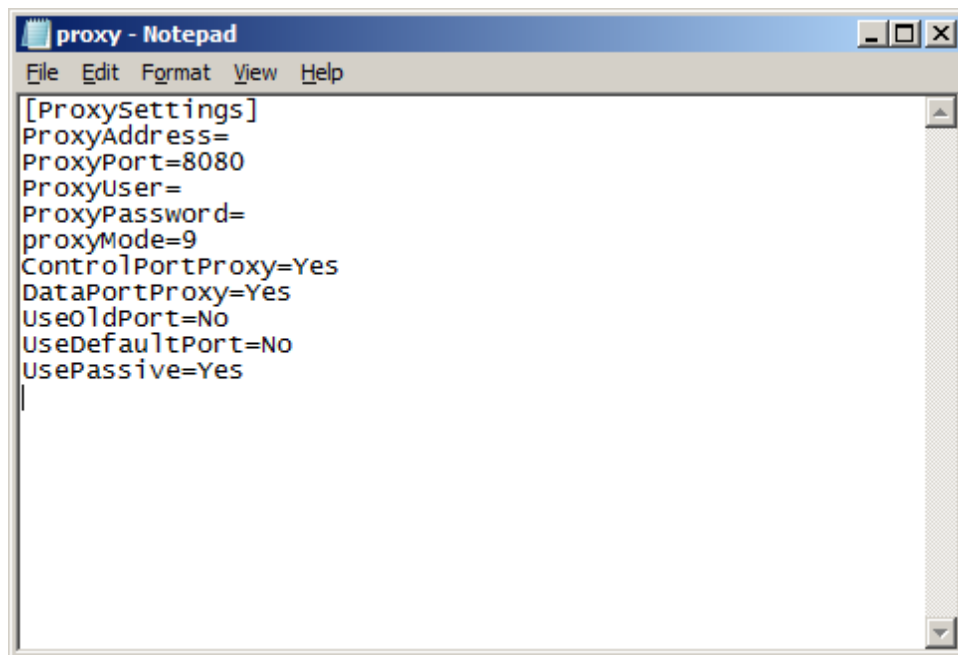


2. Find the "proxy" Configuration settings file.

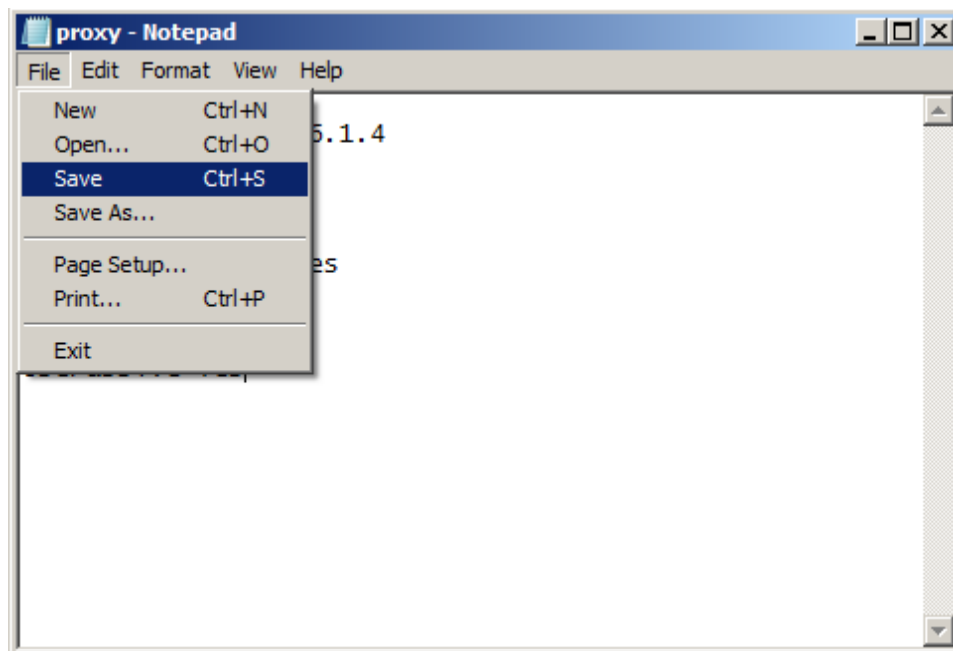




3. Double click the "proxy" Configuration settings file, proxy notepad will display



4. Type in the proxy IP address in "ProxyAddress.= "
5. Save the file then close.

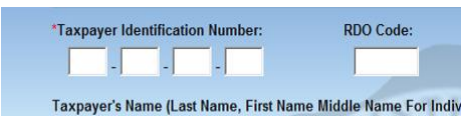
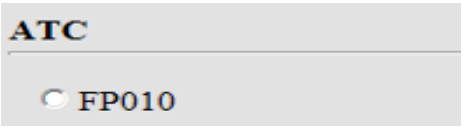
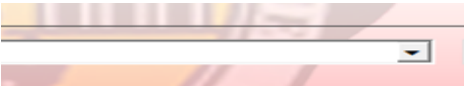
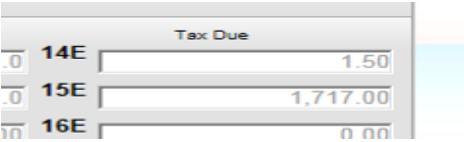
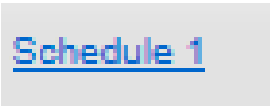




## 4.2. How to Navigate Through the Form

- 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

### Types of Input

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



### 4.2.1. How to Fill Up the Profile 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

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

#### Profile

\*Taxpayer Identification Number: [ ] - [ ] - [ ] - [ ] RDO Code: (Select RDO) Line of Business: [ ]

Taxpayer's Name (Last Name, First Name, Middle Name For Individual)  
Registered Name (For Non-Individual): [ ]

Registered Address: [ ]

Zip Code: [ ] Telephone Number: [ ]

Email Address: [ ]

#### List of BIR Forms:

(Please Select) [ ] [ ] Fill-up

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

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

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

#### Profile

\*Taxpayer Identification Number: [ ] - [ ] - [ ] - [ ] RDO Code: (Select RDO) Line of Business: [ ]

Taxpayer's Name (Last Name, First Name, Middle Name For Individual)  
Registered Name (For Non-Individual): [ ]

Registered Address: [ ]

Zip Code: [ ] Telephone Number: [ ]

Email Address: [ ]

#### List of BIR Forms:

(Please Select) [ ] [ ] Fill-up

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



- Help>> Documentary Stamp – consists of help file for BIR Form No. 2000
  - Help>> Excise – consists of help file for BIR Form No. 2200A, 2200P, 2200T, 2200AN and 2200M
  - Help>> Income – consists of help file for BIR Form No. 1700, 1701, 1701Q, 1704, 1702Q, 1702EX, 1702MX and 1702RT
  - Help>> ONETT – consists of help file for BIR Form No. 1606, 1706, 1707, 1707A, 1800, 1801 and 2000-OT
  - Help>> Payment – consists of help file for BIR Form No. 0605
  - Help>> Percentage – consists of help file for BIR Form No. 2551, 2551M, 2552 and 2553
  - Help>> Value Added Tax – consists of help file for BIR Form No. 2550M and 2550Q
  - Help>> Withholding – consists of help file for BIR Form No. 1601C, 1601E, 1601F, 1602, 1603, 1600, 1600WP, 1604CF and 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.

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

**Profile**

Taxpayer 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:  Telephone Number:

Email Address:

**List of BIR Forms:**

(Please Select)...

File Name	Return Period	Date Created



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

FileHelp

Government Property Not For Sale

Profile

Taxpayer Identification Number:

-

-

-

RDO Code:

(Select RDO) ▾

Line of Business:

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

Registered Address:

Zip Code:

Telephone Number:

Email Address:

List of BIR Forms:

(Please Select) ▾Fill-up

File Name

Return Period

Date Created

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

Offline eBIRForms Package v6.3

FileHelp

Government Property Not For Sale

Profile

Taxpayer Identification Number:

RDO Code:

(Select RDO) ▾

Line of Business:

Taxpayer's Name (Last Name, First Name, Middle Name For Individual)

Registered Name (For Non-Individual):

Registered Address:

Zip Code:

Telephone Number:

Email Address:

List of BIR Forms:

(Please Select)...

Fill-up

File Name	Return Period	Date Created



- **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.

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

### Profile

\*Taxpayer Identification Number:  -  -  -  RDO Code:  (Select RDO) Line of Business:

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

Registered Address:

Zip Code:  Telephone Number:

Email Address:

### List of BIR Forms:

(Please Select)...

File Name	Return Period	Date Created
[Empty list area]		

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

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

### Profile

\*Taxpayer Identification Number:  -  -  -  RDO Code:  (Select RDO) Line of Business:

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

Registered Address:

Zip Code:  Telephone Number:

Email Address:

### List of BIR Forms:

(Please Select)...

File Name	Return Period	Date Created
[Empty list area]		



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

The screenshot shows the eBIRForms application window. The top menu bar includes 'File' and 'Help'. The main area is divided into a profile section and a 'List of BIR Forms' section. The profile section contains input fields for: Taxpayer's Name (Last Name, First Name, Middle Name For Individual), Registered Name (For Non-Individual), Registered Address, Zip Code, Telephone Number, and Email Address. The 'List of BIR Forms' section shows a table with columns for File Name, Return Period, and Date Created. A red circle highlights the 'View' and 'Delete' buttons at the bottom right of the table.

File Name	Return Period	Date Created
111111111111-1702RT-1214	1214	04/16/2015 12:06:34

1. Fill- up the input fields under the Profile section.
2. 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.





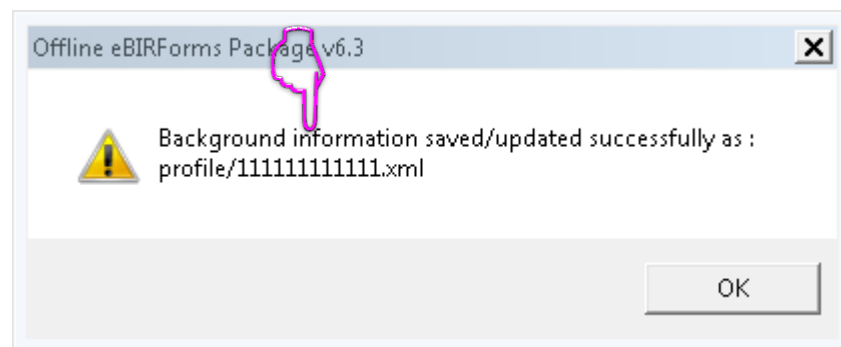


3. Select form to be filled up from the List of BIR Forms. Click 'Fill-up.'

The screenshot shows the eBIRForms application interface. At the top, there are input fields for 'Taxpayer's Name (Last Name, First Name, Middle Name For Individual)' and 'Registered Name (For Non-Individual)'. Below these are fields for 'Registered Address', 'Zip Code', and 'Telephone Number'. An 'Email Address' field is also present. A 'List of BIR Forms:' section features a dropdown menu with 'BIR Form 1701 - Annual Income Tax Return' selected. A 'Fill-up' button is located to the right of the dropdown. Below the dropdown is a table with columns 'File Name', 'Return Period', and 'Date Created'. The background of the form has a large, faint watermark of the Bureau of Internal Revenue seal.

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

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





## 4.2.2 How to Return to Parent Screen

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

The screenshot shows the BIR Form No. 0605 Payment Form interface. The menu bar at the top left contains 'File' and 'Help'. The 'File' menu is circled in red. The form itself is titled 'Payment Form 0605' and includes various fields for taxpayer information, background information, and computation of tax. The 'File' menu is highlighted with a red circle.

2. Click 'File' then select Main Screen.

The screenshot shows the BIR Form No. 0605 Payment Form interface. The 'File' menu is open, and the 'Main Screen' option is circled in red. The form itself is titled 'Payment Form 0605' and includes various fields for taxpayer information, background information, and computation of tax. The 'Main Screen' option is highlighted with a red circle.

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



### 4.2.3. 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.

Offline eBIRForms Package v6.3

File Help

Government Property Not For Sale

**Profile**

Taxpayer Identification Number:       RDO Code: (Select RDO) Line of Business:

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

Registered Address:

Zip Code:  Telephone Number:

Email Address:

**List of BIR Forms:**

(Please Select)  Fill-up

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

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

File Help

Government Property Not For Sale

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

Registered Address:

Zip Code:  Telephone Number:

Email Address:

**List of BIR Forms:**

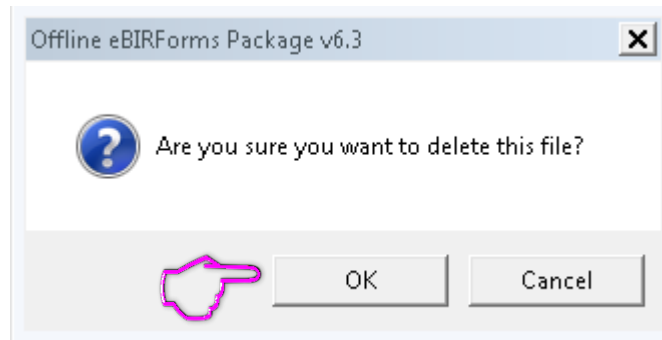
BIR Form 1702RT - Annual Income Tax Return (REGULAR) Fill-up

File Name	Return Period	Date Created
<input type="radio"/> 111111111111-1702RT-1214	1214	04/16/2015 12:06:34

View Delete



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.





#### 4.2.4. How to Submit using FINAL COPY button

1. Once the final version of the form is completed for submission to the BIR, Click **SUBMIT / FINAL COPY** button found at the bottom page of eBIRForms.

We declare, under the penalties of perjury, that this return has been made in good faith, verified by us, and to the best of our knowledge and belief, is true and correct, pursuant to the provisions of National Internal Revenue Code, as amended, and the regulations issued under authority thereof.

29 \_\_\_\_\_ 30 \_\_\_\_\_  
 President/Vice-President/Authorized Representative Treasurer/Asst. Treasurer/Authorized Representative  
 (Signature over printed Name) (Signature over printed Name)

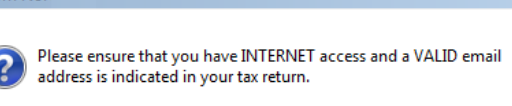
\_\_\_\_\_  
 Tax Agent Tax Agent Accreditation No.

Community Tax Certificate Number Place of Issue Date Issued (DD/MM/YYYY) Amount


31 21321312 32 MANILA 33 1 01 - January 2016 34 2,222.00

Validate Edit Save Print Submit / Final Copy

2. The following message window will be displayed. Click Ok.



BIR Form No. [X]

 Please ensure that you have INTERNET access and a VALID email address is indicated in your tax return.

FOR RETURNS WITH PAYMENTS, print the tax return and proceed to pay through the Authorized Agent Bank / Collection Agent under the RDO where you are registered or through GCASH.

Are you sure you want to submit?

OK Cancel

3. The eBIRForms Terms of Service Agreement (TOSA) page will be displayed. Click the “[here](#)” link.


**eBIRForms Terms of Service Agreement (TOSA)**

Thank you for using eBIRForms. By clicking Agree, you confirm that you have read, understood and agreed to the TOSA.

The full eBIRForms TOSA can be accessed [here](#).

Ok

Cancel



4. Read and understand the TOSA. Scroll down up to the bottom part and click Agree.



## 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. The terms "Bureau", "we", "us" and "our" refer to the Bureau of Internal Revenue or BIR, the legal name of the owner of the website. The term "you" refers to the taxpayer, tax agent, tax software provider or any user or viewer of our site. The Bureau reserves the right to modify these terms or provide additional terms from time to time. The continued use of the Service following the posting of any changes to the Terms of Service constitutes your acceptance of such changes.

## Description of Service

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

The Service provides you with the following services:

- downloadable tax preparation software package
- taxpayer, tax agent and tax software provider enrollment
- file/submit tax returns, and attachments (upon system's update)
- access to payment facility to make payments
- access to the taxpayer's record
- access to tax records of tax agent including clients who authorized such tax agent for electronic filing and/or payment
- update user record
- assign tax agent by taxpayer and correspondingly, tax agent to represent a taxpayer
- third party data lay-out requirements publication
- third party software compliance testing

## General User's Obligations

### Filing/Submitting Tax Returns

In filing or submitting tax returns, you may either use the eBIRForms software package or the system's upload facility for the returns generated by an accredited third party software.

It is your responsibility to file your return and pay the correct taxes on time, failure to do so may result to the imposition of corresponding penalties (e.g., surcharge and interest) and to civil and criminal liability as provided by law and regulations.

### Use of eBIRForms Software Package

The eBIRForms software package is for your personal, non-commercial use only. The downloaded software package is used for filing up of tax returns, and there is a facility for its electronic submission. It is designed with automatic population of selected taxpayer information and automatic mathematical computation of tax due based on encoded taxable amounts.

It may be used by accredited tax agents/practitioners enrolled in the system in providing services for their clients who have authorized them to file tax returns on said taxpayers' behalf.

The Service ensures the preservation of data transmitted and includes safeguards against efforts to tamper with, manipulate, alter, or subvert the data. Tampering or any attempt to tamper the eBIRForms application software package or data will be dealt with in accordance with the applicable laws.

You are responsible for using the eBIRForms software package only on computers and telephone or other lines that you have permission to use, and you are responsible for all related charges, if applicable, such as cable, ISP, and telephone charges.

You are strictly prohibited from modifying, copying, distributing, transmitting, displaying, performing, reproducing, publishing, licensing, creating derivative works, transferring or selling any information contained in the package, for a fee or otherwise.

### Updates of eBIRForms software package

You are required to download updated eBIRForms software package when notified of new versions of the said package.

### Use of third party software for filing

You are only allowed to use the accredited third party software to generate tax returns for filing.

### Inactive Accounts

To ensure efficiency in the Service, dormant accounts or those with prolonged period of inactivity shall be suspended and shall be archived and cleaned-up from the system. The system shall notify you through email in case of any account suspension.

## Session Log-out

Your eBIRForms session shall automatically log-out after a predefined duration of no keyboard activity.

## Taxpayer's Obligations

### Enrollment Obligation

In consideration of your use of the Service, you undertake to provide true, accurate, current and complete information about yourself or your organization as required by the eBIRForms enrollment process. You shall maintain and update the data to keep it true, accurate, current and complete.

BIR reserves the right to terminate or suspend your account and to refuse current or future use of the eBIRForms in case any information you provided is found to be untrue, inaccurate, obsolete or incomplete.

### Security Obligation

You undertake to use the Service in a manner that protects your privacy and the data/information you provide.

As part of the enrollment process, you will be provided with an account username and password. You agree not to disclose your account password to anyone and you are fully responsible for all activities that occur under your account username.

You are advised to use a strong password consisting of at least eight (8) characters, with numeric as well as alphabetic characters, and with a mix of upper and lower case alphabetic characters and at least one special character (for example, !@#).

You agree to log-out or lock your computer if unattended to ensure that unauthorized users do not gain access to your account and the data you provided and were provided to you through the Service. You should ensure that you exit from your account at the end of every session.

To ensure adequate security in the system, note that the maximum limit set for unsuccessful log-on attempts is three (3) within a sixty-minute period. In the event of account lock, you should request your Revenue District Office (RDO) in writing to unlock your account so you may resume access thereto.

You are responsible for the protection of your computer where eBIRForms system is installed against viruses, worms or malware.

You shall immediately notify the BIR Helpdesk at telephone number (02) 981-7050 or (02) 981-7051 of any unauthorized use of your password or account, or any other breach of security.

### Legal Obligation

The Service provides you various email notifications that may require response or confirmation relative to your use of the system. You must promptly respond to or confirm the email notifications when required.

In filing tax returns using the eBIRForms software package or third party software generated return, you may only file your own or your organization's tax returns. You are not allowed to file tax returns of other persons/parties, unless you are a tax agent duly authorized by your client to file such tax returns.

### Payment Obligation

It is your obligation to ensure that payment shall be received by the BIR and be cleared on the BIR account on or before the due dates.

## Accredited Tax Agent's Obligations

### Enrollment Obligation

In consideration of your use of the Service, you undertake to provide true, accurate, current and complete information about yourself and the taxpayer you are duly authorized to represent as required by the eBIRForms enrollment process. You shall maintain and update the data to keep it true, accurate, current and complete.

BIR reserves the right to terminate or suspend your account and to refuse current or future use of the eBIRForms in case any information you provided is found to be untrue, inaccurate, obsolete or incomplete.

### Security Obligation

You undertake to use the Service in a manner that protects your privacy and the privacy of the taxpayer you are duly authorized to represent and the data/information you provide.

As part of the enrollment process, you will be provided with an account username and password. You agree not to disclose your account password to anyone and you are fully responsible for all activities that occur under your account username.

You are advised to use a strong password consisting of at least eight (8) characters, with numeric as well as alphabetic characters, and with a mix of upper and lower case alphabetic characters and at least one special character (for example, !@#).

You are advised to change your password periodically (i.e., monthly or as may be deemed necessary).

You agree to log-out or lock your computer if unattended to ensure that unauthorized users do not gain access to your account and the data you provided and were provided to you through the Service. You should ensure that you exit from your account at the end of every session.

To ensure adequate security in the system, note that the maximum limit set for unsuccessful log-on attempts is three (3) within a sixty-minute period. In the event of account lock, you should request your RDO in writing to unlock your account so you may resume access thereto.

You are responsible for the protection of your computer where eBIRForms system is installed against viruses, worms or malware.

You shall immediately notify the BIR Helpdesk at telephone number (02) 981-7050 or (02) 981-7051 of any unauthorized use of your password or account, or any other breach of security.



## Legal Obligation

To be able use this website to access data or perform activities as agent of another person/taxpayer, you should have been duly authorized/appointed/designated as the taxpayer's agent, which authority continues to be effective or must not have been revoked.

For purposes of using the Service as a tax agent of another person/taxpayer, you should be an accredited tax agent/practitioner before the BIR pursuant to Revenue Regulations No. 11-2006, as amended by Revenue Regulations No. 4-2010.

You may only act as an agent and represent another person/taxpayer after receiving an email confirmation from the BIR allowing you to do so.

The Service provides you various email notifications that may require response or confirmation relative to your use of the system. You must promptly respond to or confirm the email notifications when required.

You shall not upload files other than the tax returns of taxpayers you are duly authorized to represent and the corresponding attachments. Any violation of this condition shall constitute a ground for the Bureau to terminate or suspend your account and refuse current or future use of the Service.

## Payment Obligation

It is your obligation to ensure that payment shall be received by the BIR and be cleared on the BIR account on or before the due dates.

## Tax Software Provider's Obligations

### Enrollment Obligation

In consideration of your use of the Service, you undertake to provide true, accurate, current and complete information about yourself or your organization as required by the eBIRForms enrollment process. You shall maintain and update the data to keep it true, accurate, current and complete.

BIR reserves the right to terminate or suspend your account and to refuse current or future use of the eBIRForms in case any information you provided is found to be untrue, inaccurate, obsolete or incomplete.

### Security Obligation

You undertake to use the Service in a manner that protects your privacy and the privacy of any other person/taxpayer and the data/information you provide.

As part of the enrollment process, you will be provided with an account username and password. You agree not to disclose your account password to anyone and you are fully responsible for all activities that occur under your account username.

You are advised to use a strong password consisting of at least eight (8) characters, with numeric as well as alphabetic characters, and with a mix of upper and lower case alphabetic characters and at least one special character (for example, !, @, #).

You are advised to change your password periodically (i.e., monthly or as may be deemed necessary).

You agree to log-out or lock your computer if unattended to ensure that unauthorized users do not gain access to your account and the data you provided and were provided to you through the Service. You should ensure that you exit from your account at the end of every session.

To ensure adequate security in the system, note that the maximum limit set for unsuccessful log-on attempts is three (3) within a sixty-minute period. In the event of account lock, you should request your RDO in writing to unlock your account so you may resume access thereto.

You are responsible for the protection of your computer where eBIRForms system is installed against viruses, worms or malware.

You shall immediately notify the BIR Helpdesk at telephone number (02) 981-7050 or (02) 981-7051 of any unauthorized use of your password or account, or any other breach of security.

### Legal Obligation

The Service provides you various email notifications that may require response or confirmation relative to your use of the system. You must promptly respond to or confirm the email notifications when required.

You are strictly prohibited from sharing your certification number and access credentials to a third party software provider not accredited by the eBIRForms system.

You undertake to strictly follow the instructions and guidelines for tax software providers as issued by BIR.

You agree to provide software with an electronic export facility that will generate the tax returns.

It must be understood that the accreditation issued by the BIR to the tax software provider does not constitute endorsement, sponsorship or approval of the software used to generate the tax returns.

## Disclaimer

The BIR is providing the eBIRForms website as an alternative mode of filing tax returns. The content of the website is provided in an "as is basis" and without any express or implied warranties.

The BIR does not warrant that the Service will be uninterrupted; be free from inaccuracies, errors, viruses or other harmful components; operate in the configuration or with the hardware or software you use.

The BIR is not liable or responsible for any damages, expenses, costs or loss of any kind (including, but not limited to, any direct, indirect, special, incidental, or consequential damages, financial losses, loss of profits, loss of any data or loss of any opportunity) caused as a result (directly or indirectly) of, or in connection with, your use of the Service (including the downloads and/or use of the services) or reliance on any information, materials, tools, provided in or available from this site.

Last update: June 1, 2015



Agree

5. The page will redirect back to eBIRForms TOSA page. Click OK.

6. The system will **submit the accomplished tax return form to BIR through COMPUTER GENERATED EMAIL. AN EMAIL WILL ALSO BE SENT TO THE TAXPAYER.**



#### 4.2.5. How to Submit to eFPS

1. Accomplish the form using eBIRForms offline package
2. Click the **SUBMIT / FINAL COPY** button to allow system to forward to BIR the completed Tax Return form.

Machine Validation / Revenue Official Receipt Details (if not filed with an Authorized Agent Bank)

Prev 1 / 4 Next

Validate Edit Save Print Submit / Final Copy

3. The following screen will be displayed. Click the **OK** button.

BIR Form No. 1700

? You will now be redirected to eFPS Online.

OK Cancel

4. You will now be redirected to the eFPS LOG-IN screen. Type your USERNAME, PASSWORD and ANSWER to the Challenge Question.

eFPS Login

TIN : 222 - 222 - 222 - 000

Username: myusername

Password : .....

Note: Username and Password are case-sensitive.

LOGIN

[Forgot password](#) | [Enroll to eFPS](#) | [BIR Main](#) | [Help](#)

5. Once logged in eFPS, the screen will display all the information encoded in the Offline eBIRForm Package.

*NOTE: You may read the detailed procedures specified in the respective JOB AIDS found in the eFPS Home Page and you may click "Guidelines and Instructions" found in the upper right portion of the form.*

6. In case of Amended Return, enter the Amount Paid in Return Previously filed, if any.

1702-RT	: Page 6, Schedule 7, Item No. 8
1702-MX	: Page 7, Schedule 8, Item No. 8
1700	: Page 2, Item No. 16
1701	: Page 9, Schedule 9, Item No. 6

7. Click on the **VALIDATE** button, then **SUBMIT** the Form. A **Filing Reference Number (FRN)** will be generated as proof that the return has been received by the Bureau. You may print the FRN for future use. When the system displays a message prompt for late filing, disregard the message if the return has been previously filed. The previous FRN will be tagged as the original return and the subsequent FRN issued will be tagged as an amended return in eFPS.





8. Click the **PROCEED TO PAYMENT** button, if there is any tax to be paid, and follow the existing procedures for **ePAYMENT**.

## 5. Frequently Asked Questions (FAQs)

Question	Answer
What is the eBIRForms Project?	<p>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 tax agents to prepare their returns offline, validate, edit, save and print their returns, and submit online.</p> <p>The eBIRForms project will be fully implemented by December 2012.</p> <p>Temporarily, while the eBIRForms Filing Infrastructure is under development, there will be manual (hard copy) submission of accomplished forms.</p>
Are the eBIRForms new forms?	No, it is just an electronic format of the existing BIR forms.
What is the difference between the PDF eBIRForms and the eBIRForms package?	<p>The PDF eBIRForms are the temporary solution for the Annual ITR forms.</p> <p>The eBIRForms package contains the remaining forms. Eventually, the Annual ITR forms will become part of the eBIRForms package.</p>
How do I download the eBIRForms?	<p>If you have internet connection:</p> <ul style="list-style-type: none"> <li>Go to the BIR website at <a href="http://www.bir.gov.ph">www.bir.gov.ph</a>. Click on eServices link, then select eBIRForms. Under Offline eBIRForms Package, click the download link at the bottom portion.</li> </ul> <p>If you do not have internet connection:</p> <ul style="list-style-type: none"> <li>Go to a BIR e-lounge and bring your USB flash drive.</li> <li>Save eBIRForms Package installer from the e-lounge computer.</li> </ul>
What are the system requirements?	<ol style="list-style-type: none"> <li>Supported Operating System: Windows Vista or Windows 7;</li> <li>Hard disk drive space needed: at least 70 MB free space;</li> <li>RAM memory needed: Runs best on 2GB or higher ActiveX components via Internet Explorer version 9 or 10;</li> <li>eBIRForms Package is best viewed in 1152 x 864 screen resolution.</li> </ol>



Question	Answer
What program do I use to open the eBIRForms?	<p>For the Annual ITR Forms, use PDF-XChange Viewer. A link to this free software will also be available in the Instructional Guide.</p> <p>For the remaining forms, just download and install the eBIRForms package.</p>
What is the difference between the current downloadable forms and the eBIRForms?	<ul style="list-style-type: none"> <li>Currently 2 available types of forms in the BIR website: <ul style="list-style-type: none"> <li>PDF Format: the form cannot be edited, and can only be printed. Taxpayers need to fill out the form handwritten or use the typewriter.</li> <li>Excel Format: the form can be typed over in a text box, but does not have automatic computations</li> </ul> </li> <li>eBIRForms: <ul style="list-style-type: none"> <li>The form can be edited and automatic computations are done even if the form is offline</li> <li>Automatic computations in the forms avoid errors in manual computation</li> </ul> </li> </ul>
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 eBIRForms (in terms of target taxpayers)?	<ul style="list-style-type: none"> <li>Large taxpayers and selected taxpayers are the primary users of the eFPS.</li> <li>Non-individual and individual taxpayers and tax agents are the target users of the eBIRForms.</li> <li>The eBIRForms will be available for large taxpayers until the eFPS is ready for BIR Form Nos. 1700, 1701 and 1702.</li> </ul>
What if I don't have a mouse? How do I fill up the form?	<ul style="list-style-type: none"> <li>Press the Tab key to move to the next box</li> <li>Press Shift + Tab key to move back to the previous box</li> <li>Press the left arrow key (←) or the right arrow key (→) to choose between radio buttons</li> <li>Press up arrow key or down arrow key to choose options in the drop down box</li> </ul>
Do I submit the form online?	Online submission to eBIRForms is available except for the Annual Income Tax Return.



Question	Answer												
What is the page setup when I print the forms?	A: Page Setup (Internet Explorer)  <b>Margin</b>  Left: 0.146 inches Right: 0.148 inches Top: 0.14 inches Bottom: 0.14 inches  (Note: Or whatever minimum margin allowed by the IE)  <b>Page Size:</b> Folio or Legal  <b>Header/Footer:</b> All six (6) boxes should be set to “Empty”.												
What is the page setup when I print the forms Annual Income Tax Return forms 1700, 1701, 1702-RT, 1702-EX and 1702-MX version 2013 ENCS?	<ul style="list-style-type: none"><li>• Check the "Print Background Colors and Images" option</li><li>• Uncheck the “Enable Shrink-to-fit” option</li><li>• Set the Margin settings<ul style="list-style-type: none"><li>Left – 0.166</li><li>Right – 0.166</li><li>Top – 0.166</li><li>Bottom – 0.166</li></ul></li><li>• All Header and Footer measurements must be set to 'Empty'</li></ul>												
What size of paper do I print the form on?	A: <b>A4</b> - for all Annual Income Tax Returns (1700, 1701, 1702RT, 1702EX and 1702MX)  <b>Legal size or Folio size (8.5" x 13")</b> – for the rest of the forms.												
How do I submit attachments?	Follow existing policies, guidelines and procedures on submission of attachments: <table><tr><th>Forms in eBIRForms Package with attachments</th><th>Attachment</th><th>Issuances</th></tr><tr><td>1701Q, 1702Q, 2550M, 2550Q, 2551M, 2553</td><td>Summary Alpha List of Withholding Taxes (SAWT)</td><td>RMC 3-2006</td></tr><tr><td>1601E, 1601F, 1600</td><td>Monthly Alpha List of Payees (MAP)</td><td>RMC 3-2006</td></tr><tr><td>2550Q</td><td>(Relief)<ul style="list-style-type: none"><li>• Summary List of Sales</li><li>• Summary List of Purchases</li><li>• Summary List of Importations</li></ul></td><td>RMC 24-2002 RMO 04-2003 RR 16-2005 RR 1-2012</td></tr></table>	Forms in eBIRForms Package with attachments	Attachment	Issuances	1701Q, 1702Q, 2550M, 2550Q, 2551M, 2553	Summary Alpha List of Withholding Taxes (SAWT)	RMC 3-2006	1601E, 1601F, 1600	Monthly Alpha List of Payees (MAP)	RMC 3-2006	2550Q	(Relief) <ul style="list-style-type: none"><li>• Summary List of Sales</li><li>• Summary List of Purchases</li><li>• Summary List of Importations</li></ul>	RMC 24-2002 RMO 04-2003 RR 16-2005 RR 1-2012
Forms in eBIRForms Package with attachments	Attachment	Issuances											
1701Q, 1702Q, 2550M, 2550Q, 2551M, 2553	Summary Alpha List of Withholding Taxes (SAWT)	RMC 3-2006											
1601E, 1601F, 1600	Monthly Alpha List of Payees (MAP)	RMC 3-2006											
2550Q	(Relief) <ul style="list-style-type: none"><li>• Summary List of Sales</li><li>• Summary List of Purchases</li><li>• Summary List of Importations</li></ul>	RMC 24-2002 RMO 04-2003 RR 16-2005 RR 1-2012											



Question	Answer
What if a certain form doesn't load properly?	Check if you have Java Run-time Environment version 1.7 installed in your computer. If not, you may download the latest version here: <a href="http://java.com/en/download/index.jsp">http://java.com/en/download/index.jsp</a>
What if the following message is displayed? <b><i>"The system detected that you have no internet connection. Please contact your internet service provider."</i></b>	If you have proxy settings or network restrictions, get the proxy IP address and follow the steps in section 4.1.3.