Before an Offline eBIR Form can be filled up, User has to create a User Profile.

1) User can proceed to the **Offline eBIRForms Profile Page**.

![Profile Page Screenshot](image)

2) Upon display of Profile Page, type in the **9 digits Tax Identification Number (TIField)** from the RDO Code dropdown list.

![TIField](image)

3) **Click the selected RDO No.** to allow system to include it in information file.

![RDO Code Dropdown](image)

4) **Type in the specific Line of Business**, refer to your Certificate of Registration (BIR Form No. 2303)

![Line of Business](image)
2) Enter details about **Registered Name**, refer to your Certificate of Registration (BIR Form No. 2303) *sample should be corporation*

![Registered Name](image)

3) Type in the **Registered Address, Zip Code and Contact Number**.

![Registered Address](image)

4) On the eBIRForms screen, proceed to **List of BIR Forms row**.

5) From the **List of BIR Forms row**, **select the appropriate form to use**

![List of BIR Forms](image)

6) **Click on the preferred form to use**

![List of BIR Forms](image)

7) When the chosen form appears on the list box, **click the Fill-up button** to enable full-image display of the form
8) System will now display full image of the chosen BIR form.

9) In filling up the whole form, proceed to **Field No. 1** to **click the appropriate month**, and type in the last 2 digits of the equivalent Calendar Year.
10) Go to Field No. 3 to select if form is for **Short Period Return**

11) Check boxes on Field No. 4 to select appropriate **Alphanumeric Tax Code (ATC)**

12) Proceed to Field No. 6 to **select appropriate RDO Code** for tax return

13) Provide complete and currently used Trade Name on Field No. 9

14) Provide complete and currently used address on Field No. 10

15) Provide complete Date of Birth using the Month-Day-Year (MM/DD/YYYY) format on Field No. 11

16) Provide complete and currently used email address on Field No. 12

17) Declare **Civil Status** on Field No. 14
18) Provide complete and current Main Line of Business on Field No. 12 if initially stated data is no longer applicable

17 Main Line of Business FREIGHT FORWARDING

19) For Field Nos. 18 and 19, type in PSIC and PSOC, refer to your Certificate of Registration (BIR Form 2303)

18 PSIC 19 PSOC

20) For Field No. 20, select appropriate box for Method of Deductions to be used

20 Method of Deductions Itemized Deductions [Section 34 (A-J), NIRC] ○ Optional Standard Deduction (OSD) 40% of Gross Sales/Receipts/Revenues/Fees [Sec. 34(L), NIRC, as amended by P.A. 9504]

21) Check box provided for Method of Accounting to follow for Field No. 21

21 Method of Accounting ☐ Cash ☐ Accrual ☐ Others (Specify)

22) Click the appropriate button if declaring Income EXEMPT from Income Tax for Field No. 22

22 Income Exempt from Income Tax? ☐ Yes ☐ No

If Yes, fill up also Mandatory Attachments PER ACTIVITY (Part X).

23) Click the appropriate box if declaring Income is subject to Special/Preferential Rate or not for Field No. 23

23 Income subject to Special/Preferential Rate? ☐ Yes ☐ No

If Yes, fill up also Mandatory Attachments PER ACTIVITY (Part X).

24) Proceed to Field No. 24 if there is declaration of Claiming for Additional Exemptions

If User clicked YES, fill up box enumerating Qualified Dependent Children

Part VIII - Qualified Dependent Children (If wife is claiming for additional exemption, please attach waiver of the husband)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name and Middle Initial</th>
<th>Date of Birth (MM/DD/YYYY)</th>
<th>Mark if Physically or Mentally Incapacitated</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

CLOSE
25) For Part II, Field No. 26 **Income Tax Due (Overpayment) for Tax Filer and Spouse**, click the *(Sum of Items 72A & 72B)* link, and provide the information needed, if applicable

26) For Field No. 27 **Less: Total Tax Credits/Payments**, click the *(Sum of Items 76A & 76B)* link, and provide the information needed, if applicable

27) For Field No. 31 **Add: Total Penalties**, click the *(From Item 84)* link, and provide the information needed, if applicable

28) For Field Nos. 33 to 37, fill out the spaces provided for validation of Tax Filer’s identity

29) For Field Nos. 38 to 40, fill up the spaces provided for **Details of Payment**

30) **Click the Next** button to proceed to adjoining page

31) For Part IV, Field No. 41 **Gross Compensation Income**, click the *(From Schedule 1 Item 5A/5B1)* link, and provide the information needed, if applicable

32) For Field No. 50 **Net Sales/Revenues/Receipts/Fees**, click the *(From Schedule 2 Item 5A/5B)* link, and provide the information needed, if applicable

33) For Field No. 51 **Add: Other Taxable Income from Operations not Subject to Final Tax**, click the *(From Schedule 3 Item 3A/3B)* link, and provide the information needed, if applicable

34) For Field No. 53 **Less: Cost of Sales/Services**, click the *(From Schedule 4 Item 27A/27B)* link, and provide the information needed, if applicable
35) For Field No. 55 **Add: Non-Operating Income**, click the *(From Schedule 5 Item 6A/6B)* link, and provide the information needed, if applicable

36) For Field No. 57 **Ordinary Allowable Itemized Deductions**, click the *(From Schedule 6 Item 40A/40B)* link, and provide the information needed, if applicable

37) For Field No. 58 **Special Allowable Itemized Deductions**, click the *(From Schedule 7 Item 5A/5B)* link, and provide the information needed, if applicable

38) For Field No. 59 **Allowance for Net Operating Loss Carry Over (NOLCO)**, click the *(From Schedule 8A1 Item 8D/Schedule 8B1 Item 8D)* link, and provide the information needed, if applicable

39) Click the **Next** button to proceed to adjoining page

40) For Part V, Field No. 68 **Regular Rate – Income Tax Due**, click the *(From Item 67A/67B)* link, and provide the information needed, if applicable

41) For Field No. 69 **Special Rate – Income Tax Due**, click the *(From Part IX Item 18B/18F)* link, and provide the information needed, if applicable

42) For Field No. 70, fill up the space provided for **Less: Share of Other Government Agency, if remitted directly**

43) For Field No. 72 **Total Income Tax Due (Overpayment)**, click the *(To Item 26)* link, and provide the information needed, if applicable

44) For Field No. 73 **Regular**, click the *(From Schedule 9 Item 10A/10B)* link, and provide the information needed, if applicable

45) For Field No. 74 **Special**, click the *(From Part IX Item 19B/19F)* link, and provide the information needed, if applicable

46) For Field No. 75 **Exempt**, click the *(From Part IX Item 19C/19G)* link, and provide the information needed, if applicable
47) For Field No. 76 **Total Tax Credit/Payments**, click the *(To Item 27)* link, and provide the information needed, if applicable.

48) For Field No. 79 **Less: Portion of Tax Payable Allowed for 2\textsuperscript{nd} Installment to be paid on or before July 15**, click the *(To Item 29)* link, and provide the information needed, if applicable.

49) For Field No. 81 - **Surcharge**, Field No. 82 – **Interest** and Field No. 83 – **Compromise**, fill up the spaces provided for **Add: Penalties**.

50) For Field No. 84 **Total Penalties**, click the *(To Item 31)* link, and provide the information needed, if applicable.

51) For Field No. 85 **Total Amount Payable Upon Filing (Overpayment)**, click the *(To Item 32)* link, and provide the information needed, if applicable.

52) For Part VI, Field No. 87 **Less: Tax Due**, click the *(To Item 67)* link, and provide the information needed, if applicable.

53) For Field No. 89 **Add: Special Tax Credits**, click the *(From Schedule 9 Item 8A/8B)* link, and provide the information needed, if applicable.

54) For Field No. 91 **Special Tax Relief Availment**, click the *(From Part IX Item 21B/21F)* link, and provide the information needed, if applicable.

55) For Field No. 92 **Exempt Tax Relief Availment**, click the *(From Part IX Item 21C/21G)* link, and provide the information needed, if applicable.

56) Click the Next button to proceed to adjoining page.

57) For Part VII, Field No. 96 – **RDO Code**, fill up the spaces provided for **Other Relevant Information - SPOUSE**.

58) For Field No. 102 – **PSIC**, fill up the spaces provided.

59) For Field No. 103 – **PSOC**, fill up the spaces provided.
60) For Field No. 104 – **Line of Business**, fill up the spaces provided.

61) For Part VIIA – **Qualified Dependent Children**, fill up the rows and columns provided for **Last Name** and **Family Name and Middle Initial**.

62) For Part VIIB – **Current Address**, fill up the rows and columns provided for.

63) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 112 – **Name of External Auditor/Accredited Tax Agent**.

64) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 113 – **TIN**.

65) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 114 – **Name of Signing Partner**.

66) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 115 – **TIN**.

67) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 116 – **BIR Accreditation No.**
68) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 117 – **Issue Date**

69) For Part VIII – **Information – External Auditor/Accredited Tax Agent**, fill up the space provided for Field No. 117 – **Expiry Date**

70) **Click the Next** button to proceed to adjoining page

71) For Page 5, Schedule 1, Field No. 1 – **Name of Employer**, fill up the spaces provided

72) For Field No. 5A – **Total Gross Compensation Income and Total Tax Withheld**, click the **(To Part IV Item 41A)** link, and provide the information needed, if applicable

73) For Field No. 5B – **Total Gross Compensation Income and Total Tax Withheld**, click the **(To Part IV Item 41B)** link, and provide the information needed, if applicable

74) For Page 5, Schedule 2, Field Nos. 1, 2 & 4, fill up the spaces provided

75) For Schedule 2, Field No. 5 – **Net Sales/Revenues/Receipts/Fees**, click the **(To Item 50)** link, and provide the information needed, if applicable

76) For Page 5, Schedule 3, Field No. 1, fill up the space provided

77) For Schedule 3, Field No. 3 – **Total Other Income**, click the **(To Item 51)** link, and provide the information needed, if applicable
78) For Schedule 4A, Field No. 5 – **Cost of Sales**, click the *(To Schedule 4 Item 27)* link, and provide the information needed, if applicable

79) **Click the Next** button to proceed to adjoining page

80) For Page 5, Schedule 4B – **Cost of Sales (for Manufacturing)**, Field Nos. 6, 7, 9, 11, 12, 14, 15, 17 & 18, fill up the spaces provided

81) For Page 5, Schedule 4C – **Cost of Services (for Services)**, Field Nos. 20 to 25, fill up the spaces provided

82) For Schedule 4C, Field No. 27 – **Total Cost of Sales/Services**, click the *(To Part IV Item 53)* link, and provide the information needed, if applicable

83) For Schedule 5 – **Non-Operating Income**, Field No. 1, fill up the rows provided

84) For Schedule 6 – **Ordinary Allowable Itemized Deductions**, Field No. 2, fill up the row provided

85) **Click the Next** button to proceed to adjoining page

86) For Schedule 6 – **Ordinary Allowable Itemized Deductions**, Field No. 5 to 39, fill up the rows provided

87) **Click the Next** button to proceed to adjoining page

88) For Schedule 7 – **Special Allowable Itemized Deductions**, Field No. 1 to 4, fill up the rows and columns provided

89) For Schedule 7, Field No. 5 – **Total Special Allowable Itemized Deductions**, click the *(To Item 58)* link, and provide the information needed, if applicable

90) For Schedule 8A.1 – **Taxpayer/Filer’s Detailed Computation of Net Operating Loss Carry Over (NOLCO)**, Field Group Letters A to D, Field Nos. 5 to 7, fill up the rows and columns provided
91) For Schedule 8A.1, Field No. 8 – **Total NOLCO**, click the *(To Item 59A)* link, and provide the information needed, if applicable

92) For Schedule 8B.1 – **Spouse’s Detailed Computation of Net Operating Loss Carry Over (NOLCO)**, Field Group Letters A to D, Field No. 5, fill up the rows provided

93) For Schedule 8B.1, Field No. 8 – **Total NOLCO**, click the *(To Item 59B)* link, and provide the information needed, if applicable

94) **Click the Next** button to proceed to adjoining page

95) For Schedule 9 – **Tax Credits/Payments**, Field Nos. 1 to 4 & 7 to 9, fill up the rows provided

96) For Schedule 9, Field No. 5 – **Creditable Tax Withheld per BIR Form 2316**, click the *(From Schedule 1 Item 5A2/5B2)* link, and provide the information needed, if applicable

97) For Schedule 9, Field No. 10 – **Total Tax Credits/Payments**, click the *(To Item 73)* link, and provide the information needed, if applicable

98) For Schedule 10 – **Balance Sheet**, Field Nos. 1 to 6, 8 to 11 & 13 to 15, fill up the rows provided

99) **Click the Next** button to proceed to adjoining page

100) For Schedule 11A – **Tax Filer’s Reconciliation of Net Income per Books Against Taxable Income**, Field Nos. 1, 2, 5 & 7, fill up the rows provided

101) For Schedule 11B – **Spouse’s Reconciliation of Net Income per Books Against Taxable Income**, Field Nos. 1, 2, 5 & 7, fill up the rows provided

102) **Click the Next** button to proceed to adjoining page
103) For Schedule 12A – **Gross Income/Receipts Subjected to Final Withholding Tax**, Field Group No. I, Field Nos. 1 to 6, Field Group No. II, Field Nos. 7 to 11, Field Group No. III, Field Nos. 12 to 17 and Field Group No. IV, Field Nos. 18 to 20, fill up the rows and columns provided.

104) For Schedule 12B – **Gross Income/Receipts Exempt from Income Tax**, Field Nos. 1 to 3, Field Group No. II, Field Nos. 4 to 7 and Field Group No. III, Field Nos. 8 & 9, fill up the rows and columns provided.

105) **Click the Next** button to proceed to adjoining page.

106) For Part IX, Field No. 1 – **Sales/Revenues/Receipts/Fees**, click the [From Part IV Item 50A/50B - Regular](#) link, and provide the information needed, if applicable.

107) For Field No. 2 – **Other Income from Operations not Subject to Final Tax**, click the [From Part IV Item 51A/51B - Regular](#) link, and provide the information needed, if applicable.

108) For Field No. 4 – **Less: Cost of Sales/Service**, click the [From Part IV Item 53A/53B - Regular](#) link, and provide the information needed, if applicable.

109) For Field No. 6 – **Add: Non-Operating Income**, click the [From Part IV Item 55A/55B - Regular](#) link, and provide the information needed, if applicable.

110) For Field No. 8 – **Ordinary Allowable Itemized Deductions**, click the [From Part IV Item 57A/57B - Regular](#) link, and provide the information needed, if applicable.

111) For Field No. 9 – **Special Allowable Itemized Deductions**, click the [From Part IV Item 58A/58B - Regular](#) link, and provide the information needed, if applicable.

112) For Field No. 10 – **Allowance for Net Operating Loss Carry Over (NOLCO)**, click the [From Part IV Item 59A/59B - Regular](#) link, and provide the information needed, if applicable.
113) For Field No. 14 – **Add: Net Taxable Compensation Income**, click the *(From Part IV Item 63A/63B - Regular)* link, and provide the information needed, if applicable

114) For Field No. 16 – **Less: Excess Deductions**, click the *(From Part IV Item 65A/65B - Regular)* link, and provide the information needed, if applicable

115) For Field No. 18 – **Total Income Tax Due (Regular)**, click the *(From Part V Item 68A/68B - Regular)* link, and provide the information needed, if applicable

116) For Field No. 19 – **Less: Total Tax Credits/Payments**, click the *(From Schedule 9 Item 10A/10B - Regular)* link, and provide the information needed, if applicable

117) For Field No. 21 – **Total Tax Relief Availment (Regular)**, click the *(From Part VI Item 90A/90B)* link, and provide the information needed, if applicable

118) For Field No. 21 – **Total Tax Relief Availment (Special)**, click the *(From Part VI Item 91A/91B)* link, and provide the information needed, if applicable

119) For Field No. 21 – **Total Tax Relief Availment (Exempt)**, click the *(From Part VI Item 92A/92B)* link, and provide the information needed, if applicable

120) When finished typing in the necessary details, click the VALIDATE button to allow system to check all the fields.
121) Once the VALIDATE button has been clicked and system detects and unfilled box or incorrect detail, system will require User to make the necessary action.

122) The message shown onscreen will remain visible until User makes the necessary action.

123) If User has made the necessary action, system will show message stating successful validation.

124) The VALIDATE button will become deactivated after successful validation.

125) User can click the EDIT button if details need to be changed or added for a certain field.
126) After clicking the EDIT button, User must navigate to where details need to be changed or added for a certain field.

127) The EDIT button will become deactivated after it has been clicked and editing is in progress.

128) However, the VALIDATE button will become active again during the editing process.

129) When finished in editing, click the VALIDATE button again to allow system to check changes in all the fields.
130) System will show message stating successful validation if newly added data has been checked by system and found to be appropriate

131) User can save the changes or additions placed on the document

132) Click the SAVE button to save changes or additions

133) System will then show message stating successful saving, together with a system-generated file name
134) Click the OK button to acknowledge successful saving of file.

135) System will show another message stating that background information was successfully saved/updated, together with a system-generated file name.

136) Click the OK button to acknowledge successful saving of file.

137) Click the PRINT button if a single page or all document pages need to be printed.
138) Once the PRINT button has been clicked, a full image of the particular page to be printed will appear onscreen.

139) Alongside the full image of page to be printed, the various Print Commands will appear onscreen after clicking the FILE tab.
140) To initialize printing, click the FILE tab to enable display of Print Commands, then click the PRINT activity

141) The printer dropdown list will appear

142) Click on the chosen printer to use
143) Specify page range to cover. Click the ALL box if all pages have to be printed.

144) Or specify the exact page number to be printed by clicking the PAGES button. Type in the beginning page number and the ending page number.

145) Specify total number of copies to print. User can type in the exact number of copies on the box provided.

146) Or click the arrow pointer downwards and upwards to enter the number of copies.
147) Click the PRINT button to initialize printing of document.

148) System will then process the request. A message will appear onscreen indicating the printing task is in progress.

149) When finished in saving, click the SUBMIT button to allow system to forward to BIR the completed Tax Return form.
150) After clicking the SUBMIT button, User must choose which particular electronic BIR site to submit the completed Tax Return forms.

151) User can either choose to navigate to the eBIRForms Online site

152) Or proceed to the Electronic Filing and Payment System (eFPS) site

153) If User clicks the eBIRForms Online site, system will display a message onscreen which User must respond to.
154) If User clicks the OK button

155) System will display this message

156) If User clicks the eFPS site, system will display a message onscreen which User must respond to.

157) If User clicks the OK button
158) System will display this message

![Message](image1.png)

159) User may want to have a Final Copy of the completed Tax Return form for reference purposes

160) Click the FINAL COPY button

![Button](image2.png)

161) System will show a message onscreen which User must respond to

![Message](image3.png)
162) If User wishes to save another copy of the document using a USB flash drive or CR-RW, just click the OK button.

163) System will display another message.

164) Click the arrow pointer downwards to specify which drive to save the file.
165) Click the OK button

166) System will display message of successful saving of file to selected path/folder

167) Click the OK button to confirm successful file saving

168) System will navigate screen back to Main Page, and FINAL COPY button will become deactivated
TO SET-UP AND PERFORM PRINTING TASKS FOR 1701 FORM

1) Go to the Windows Main Page and click the START button.

2) Proceed to the programs and files list. Select Devices and Printers.
3) System will display onscreen all the Devices and Printers available.

4) From the selection of Devices and Printers, click the Microsoft XPS Document Writer.
5) Set the Microsoft XPS Document Writer as the default printer

6) After setting up the default printer, proceed to Internet Explorer

7) Upon reaching Internet Explorer, proceed to the Google window
8) From the Google window, click the Tools icon.

9) Click the Page Setup and Print tabs.

10) When the Page Setup window opens, set the parameters to be followed for printing tasks.
11) User must take note of the following details:
   a. Margins
      Left – 0.166
      Right – 0.166
      Top – 0.166
      Bottom – 0.166
   b. Check Print background and images
   c. Uncheck the “Enable Shrink to Fit” option
   d. All Header and Footer measurements must be blank
   e. Paper size is set to default A4 size
   f. Prior to any printing task, Validation must be performed and completed by User

12) Click the PRINT button if a single page or all document pages need to be printed

13) Once the PRINT button has been clicked, a full image of the particular page to be printed will appear onscreen
14) Alongside the full image of page to be printed, the various Print Commands will appear onscreen after clicking the FILE tab.

15) To initialize printing, click the FILE tab to enable display of Print Commands, then click the PRINT activity.

16) The printer dropdown list will appear.
17) Click on the chosen printer to use

![Printer selection screenshot]

18) Specify page range to cover. Click the ALL box if all pages have to be printed.

![Page range selection screenshot]

19) Or specify the exact page number to be printed by clicking the PAGES button. Type in the beginning page number and the ending page number.

![Page range selection screenshot]
20) Specify total number of copies to print. User can type in the exact number of copies on the box provided.

![Number of copies]

21) Or click the arrow pointer downwards and upwards to enter the number of copies.

![Number of copies]

22) Click the PRINT button to initialize printing of document.

![Print dialog box]

23) System will then process the request. A message will appear onscreen indicating the printing task is in progress.