



Income Tax Department
Government of India

Central Board of Direct Taxes, e-Filing Project

**User Manual-ITDREIN Registration and
Upload of Form 61 and Form 61A
11 May, 2017**

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List of Abbreviations

The following table represents the abbreviation used in the document:

Abbreviation	Expansion
ITD	Income Tax Department
ITDREIN	Income Tax Department Reporting Entity Identification Number

1 Introduction

Users who have already registered in the e-Filing portal can use this functionality to generate Income Tax Department Reporting Entity Identification Number (ITDREIN) and upload certain forms in the e-Filing portal using the generated ITDREIN.

ITDREIN is the Unique ID issued by Income Tax Department (ITD) which will be communicated by ITD after the registration of the reporting entity with ITD. The ITDREIN is a 16-character identification number in the format XXXXXXXXXX.YZNNN.

The description of XXXXXXXXXX. YZNNN is described in the following table:

Table 1: Description of ITDREIN Format

ITDREIN Format	Description
XXXXXXXXXX	PAN or TAN of the reporting entity
Y	Code of Form Code
Z	Code of Reporting Entity Category for the Form Code
NNN	Code of sequence number.

2 ITDREIN Services

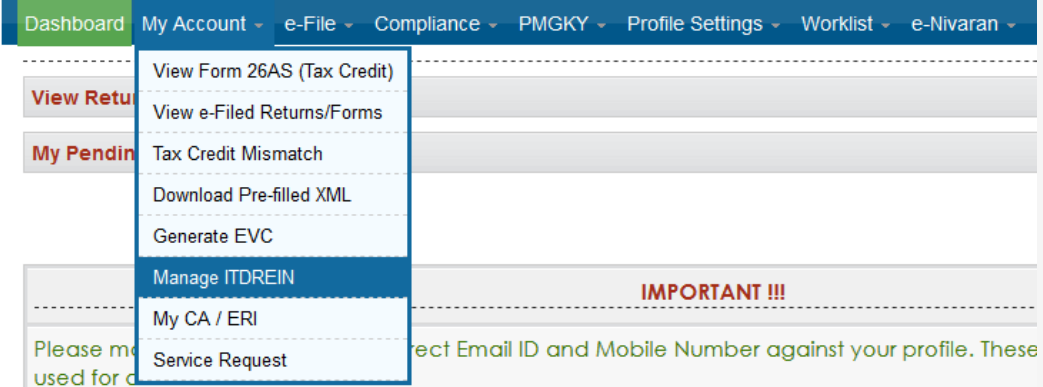
The following table represents the services available for ITDREIN Users.

Table 2: List of Services

S.No.	Services
1	Upload and View Form 61
2	Upload and View Form 61A

3 Generate ITDREIN (PAN Users)

For PAN users, perform the following steps to generate ITDREIN:

Step 1	Visit the 'e-Filing' Portal http://incometaxindiaefiling.gov.in/
Step 2	Enter the 'User ID*', 'Password*' and 'Date of Birth*'. Click 'Login'.
Step 3	<p>Navigate to the 'My Account' tab -> Click 'Manage ITDREIN' Refer the given screenshot.</p>  <p>The screenshot shows the 'My Account' dropdown menu with the following options: View Form 26AS (Tax Credit), View e-Filed Returns/Forms, Tax Credit Mismatch, Download Pre-filled XML, Generate EVC, Manage ITDREIN (highlighted), My CA / ERI, and Service Request. An 'IMPORTANT !!!' warning is visible in the background.</p>
Step 4	Click ' Generate New ITDREIN ' Refer the given screenshot.

Step 5 Select the 'Form Type*' and 'Reporting Entity Category*' from the dropdown list. -> Fill the additional details -> Click 'Generate ITDREIN' Refer the given screenshot.

Step 6 The ITDREIN will be generated based on the 'Form Type' and 'Reporting Entity Category' selection. Further, the user will be able to upload and view the corresponding Form.

Step 7 Success Message will be displayed.

After generation,

- A confirmation e-mail will be sent to the registered e-mail ID, and,
- An SMS will be sent to your registered mobile number.

4 Generate ITDREIN (TAN Users)

For TAN users, perform the following steps to generate ITDREIN:

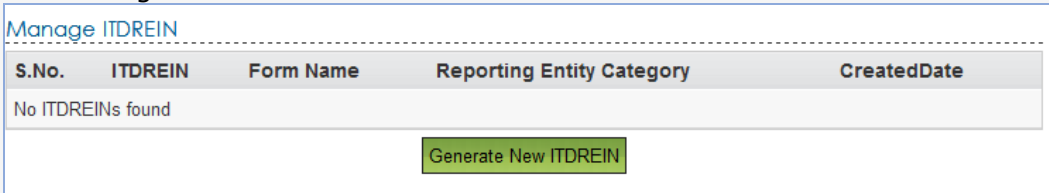
Step 1 Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>

Step 2 Enter the 'User ID*', 'Password*'. Click 'Login'.

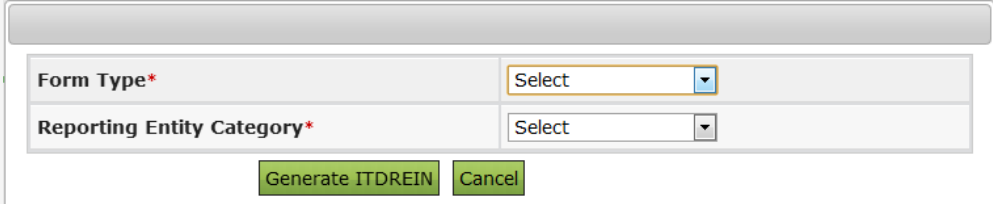
Step 3 Navigate to the 'My Account' tab -> Click 'Manage ITDREIN' Refer the given screenshot.

Kindly ensure that you must have the correct Email ID and Mobile Number for all communications from Income Tax Department.

Step 4 Click '**Generate New ITDREIN**' Refer the given screenshot.

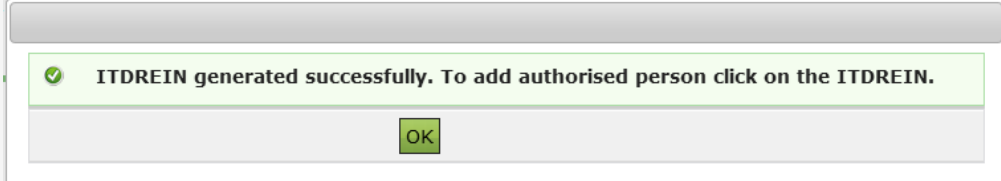


Step 5 Select the 'Form Type*' and 'Reporting Entity Category*' from the dropdown list. -> Fill the additional details -> Click 'Generate ITDREIN' Refer the given screenshot.



Step 6 The ITDREIN will be generated based on the 'Form Type' and 'Reporting Entity Category' selection. Further, the user will be able to upload and view the corresponding Form.

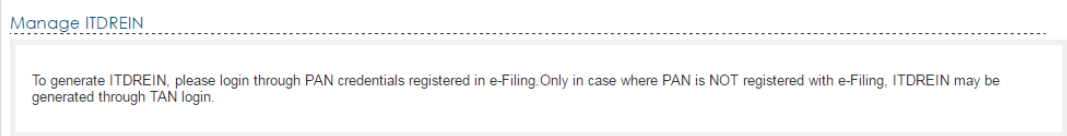
Step 7 Success Message will be displayed.



After generation,

- A confirmation e-mail will be sent to the registered e-mail ID, and,
- An SMS will be sent to your registered mobile number.

Note: If TAN Users register with PAN of Organisation, the following message will be displayed on the screen. Refer the screenshot



5 Add Authorised Person

Perform the following steps to add authorise person:

Step 1 Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>

Step 2 Enter the 'User ID*', 'Password*' and 'Date of Birth*'. Click 'Login'.

Step 3 Navigate to the '**My Account**' tab -> Click '**Manage ITDREIN**' Refer the given screenshot.

Step 4

To add Authorised Person for the generated ITDREIN, click the link provided under the '**ITDREIN**' column.

Refer the given screenshot.

[Manage ITDREIN](#)

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	PERPA1996D.AB930	Form 61A	Banking company	21/12/2016

Step 5

Click '**Add Authorised Person**'

Refer the given screenshot.

[Manage ITDREIN](#)

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
No Authorised person found for the ITDREIN								

Step 6

A window will appear carrying the 'Authorise Person' Details.

Authorised Person Type *	Select <input type="button" value="v"/>
PAN *	<input type="text"/>
Person Name*	Select Designated Director Principal Officer
Designation *	<input type="text"/>
Access Type *	Upload and View <input type="button" value="v"/>
Date of Birth (DD/MM/YYYY)*	<input type="text"/>
Mobile No. *	+91 <input type="text"/>
Email ID *	<input type="text"/>
Flat/Door/Building *	<input type="text"/>
Road/Street	<input type="text"/>
Area/Locality *	<input type="text"/>
Town/City/District *	<input type="text"/>
Pincode *	<input type="text"/>
State *	Select <input type="button" value="v"/>
Country *	Select <input type="button" value="v"/>
<input type="button" value="Add Authorised Person"/> <input type="button" value="Cancel"/>	

- Note:**
- If the Form Type is FORM 61A, user needs to select '**Authorised Person Type**' from the drop down list.
 - Under 'Authorised Person Type' for '**Designated Director**', the facility to upload and View Form 61A shall be available.
 - For '**Principal Officer**', the option to View Form 61A shall be available.
 - The details of 'Authorised Person' cannot be edited further.
 - This field is not available for 'Form 61'.

Step 6

Enter the required details -> Click '**Add Authorised Person**'. Success message will be displayed.

✔ Authorised Person Added Successfully

- Step 7**
- After adding authorise person:
- A confirmation e-mail will be sent to the **User's** registered e-mail ID, and,
 - An SMS will be sent to **User's** registered mobile number.

- Step 8**
- After adding Authorise person:
- A registration confirmation e-mail with an activation link, will be sent to the **Authorised person's** e-mail ID, and,
 - A six digit One Time Password (OTP) will be sent to the **Authorised person's** mobile number.

Step 9

To activate the account, the user must click the **Activation link**, **enter the Mobile PIN, Password and Confirm Password** and click **Activate Button**. On success, the user account will be activated and the database will

be updated.
Refer the given screenshot.

[Activation](#)

ITDREIN	XXXXX8001X BD225
Authorised Person PAN	XXXXPX2300X
Authorised Person Name	AAA BBB CCC
Mobile Pin *	<input type="text"/>
Password *	<input type="password"/> Zero Length
Confirm Password *	<input type="password"/>

After the Authorised person is activated, Authorised person can view the details.

Refer the given screenshot:

[Manage ITDREIN](#)

Step 10

Authorised Person Details Additional Details

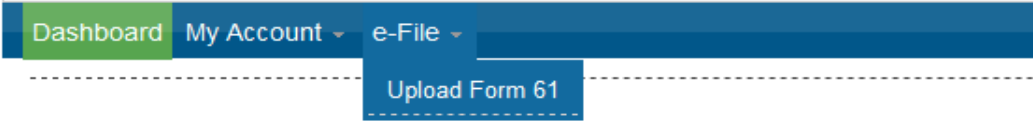
S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
1	Designated Director	AQZPK2300C	RAM	Director	Upload and View	24/05/2016	-	Active De-activate

6 Upload Forms

The following sub-sections describe the process of uploading forms through ITDREIN user in the e-Filing application.

6.1 Upload Form 61

Perform the following steps to upload Form 61:

- Step 1** Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>
- Step 2** Enter the 'User ID (ITDREIN)*', 'Authorised person's PAN*' and 'Password'. Click 'Login'.
- Step 3** Navigate to the '**e-File**' tab -> Click '**Upload Form 61**'
Refer the given screenshot.
- 
- Step 4** Enter the following details and click '**Validate**'.

Upload Form 61

Step 1: Enter Statement Details Step 2: Upload File Step 3: Upload Successful

Statement Details

PAN *	PERPA1995D
Form Name *	FORM61
Financial Year *	Select
Reporting Entity Category *	Depository
Half Year *	Select
Upload Type *	Select

Validate

After successful validation, upload the corresponding ZIP file -> Generate the Signature file using DSC Management Utility -> Click '**Upload**'.

Upload Form 61

Step 1: Enter Statement Details **Step 2: Upload File** Step 3: Upload Successful

Submit Form 61

PAN	PERPA1995D
Form Name	FORM61
Financial Year	2016
Reporting Entity Category	Depository
Half Year	H1
Upload Type	O
Attach the Form 61 (.zip) File *	<input type="button" value="Browse..."/> No file selected.

Click here to download the DSC Utility ?

Steps to Digitally Sign the Form:

- ◆ Download the "ITD e-Filing DSC Management Utility".
- ◆ Generate the signature file. Follow the instructions in the Utility.
- ◆ Attach the generated signature file.

Note: The generated signature file is valid only for one transaction.

Attach the Signature file *	<input type="button" value="Browse..."/> No file selected.
-----------------------------	--

Upload

Step 6 On successful upload, user records are captured in the e-Filing system and the following success message will be displayed along with the Transaction ID.

Upload Successful

Step 1: Enter Statement Details Step 2: Upload File **Step 3: Upload Successful**

FORM61 has been filed and the Transaction ID is: **1000727972** In case of any queries, please contact 1800 4250 0025.

An e-mail confirming the successful submission of your Form along with the Receipt number has been sent to **assessee@mail.com**

Kindly login after 24 hours to check the status of the uploaded form, (GO TO 'My Account' -> 'View Form 61').


Step 7 After uploading, uploaded file will be processed and validated. Upon validation the status shall be either 'Accepted' or 'Rejected' which will reflect within 24 hours from the time of upload.
If status reflects as 'Rejected', the reason for rejection will be available at: **My Account → View Form 61** -> Click '**Transaction No**'
Refer the given screenshot

[View Filed Form 61](#)

PAN	PERPA1995D	Financial Year	2016	Form Name	FORM61	Half Year	H1
S.No	Transaction No	Filed On	Upload Type	Status			
1	1000727972	13/01/2017	Original	Accepted			

6.2 Upload Form 61A

Perform the following steps to upload Form 61A:

- Step 1** Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>
- Step 2** Enter the 'User ID (ITDREIN)*', 'Authorised person's PAN*' and 'Password'. Click 'Login'.
- Step 3** Navigate to the '**e-File**' tab -> Click '**Upload Form 61A**'
Refer the given screenshot.
- 
- Step 4** Enter the additional details and click '**Validate**'.
- Step 5** After successful validation, upload the corresponding ZIP file -> Generate the Signature file using DSC Management Utility -> Click '**Upload**'.

[Submit Form 61A](#)

Step 1: Upload File Step 2: Upload Successful

Submit Form 61A

Reporting Entity PAN *	AAAPA3000A
Form Name	FORM61A
Reporting Entity Category *	Others
Attach the Form 61A (.zip) File *	Browse... No file selected.
Click here to download the DSC Utility ?	
<p>Steps to Digitally Sign the Form:</p> <ul style="list-style-type: none"> Download the "ITD e-Filing DSC Management Utility". Generate the signature file. Follow the instructions in the Utility. Attach the generated signature file. 	
Attach the Signature file *	Browse... No file selected.
<input type="button" value="Upload"/>	

On successful upload user records are captured in the e-Filing system and the following success message will be displayed.

Step 6

Dashboard My Account e-File

[Submit Form 61A](#)

Step 1: Upload File Step 2: Upload Successful

FORM61A has been filed and the Transaction ID is: 1000771154 In case of any queries, please contact 1800 4250 0025 or send an e-mail to efiling61a_sft@incometax.gov.in.

An e-mail confirming the successful submission of your Form along with the Receipt number has been sent to aaabbbccc@gmail.com

Kindly login after 24 hours to check the status of the uploaded form, (GO TO 'My Account' -> 'View Form 61A').

Instructions

- Fields marked with asterisk(*) are mandatory
- Please check the status of the file after 24 hours.

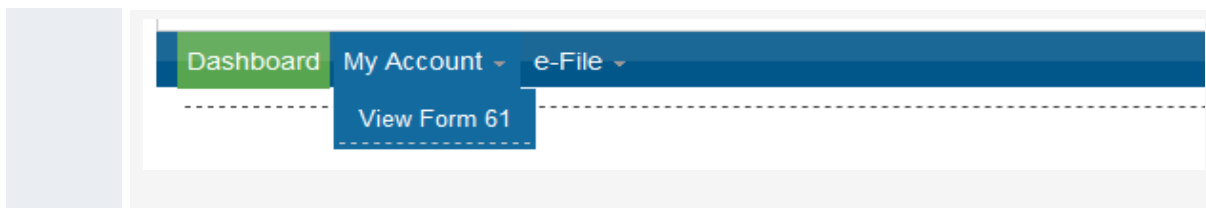
7 View Forms

The following sub-sections describe the process of Viewing Uploaded Forms in e-Filing Portal

7.1 View Form 61

Perform the following steps to view the Form 61:

- | | |
|---------------|---|
| Step 1 | Visit the 'e-Filing' Portal http://incometaxindiaefiling.gov.in/ |
| Step 2 | Enter the 'User ID (ITDREIN)*', 'Authorised person's PAN*' and 'Password'. Click 'Login'. |
| Step 3 | Navigate to the ' e-File ' tab -> Click ' View Form 61 '
Refer the given screenshot. |



Step 4

Enter the following details and click '**View Details**'.

[View Filed Form 61](#)

PAN	PERPA1995D
Financial Year *	Select
Form Name *	Select
Half Year *	Select

Step 5

The following details will be displayed to the user:

- PAN
- Financial Year
- Form Name
- Half Year/Quarter
- Status (Accepted / Rejected)

Refer the given screenshot.

[View Filed Form 61](#)

PAN	PERPA1995D	Financial Year	2016	Form Name	FORM61	Half Year	H1
S.No	Transaction No	Filed On	Upload Type	Status			
1	1000727972	13/01/2017	Original	Accepted			
2	1000727876	13/01/2017	Original	Uploaded			

Step 6

User can see the following details by clicking on the '**Transaction No**'

- ZIP file (In case of Acceptance)
- Acknowledgement Number (In case of Acceptance)
- Receipt
- Rejection Reason (In case of rejection)

Details Of Transaction Number - 1000727972

PAN	Financial Year	Form Name	Half Year
PERPA1995D	2016	FORM61	H1

Statement Details		
Status	Acknowledgement Number	Attachments
Successfully e-Filed	100384921130117	ZIP Receipt


7.2 View Form 61A

Perform the following steps to view the Form 61:

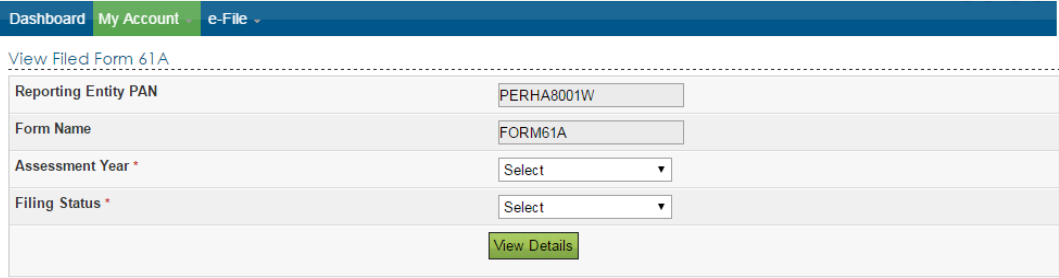
Step 1 Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>

Step 2 Enter the 'User ID (ITDREIN)*', 'Authorised person's PAN*' and 'Password'. Click 'Login'.

Step 3 Navigate to the '**e-File**' tab -> Click '**View Form 61A**'
Refer the given screenshot.



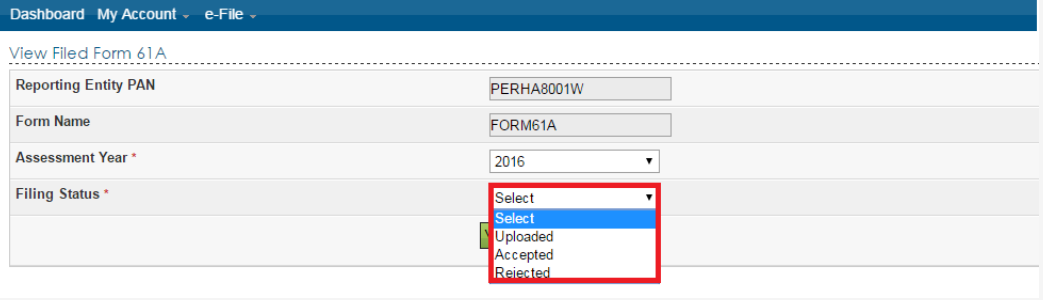
Step 4 Select the '**Assessment Year**' and '**Filing Status**' -> Click '**View Details**'



The '**Filing Status**' field will have three type of the status:

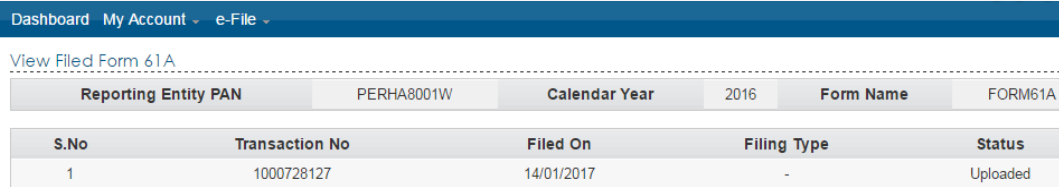
- Uploaded
- Accepted
- Rejected

Refer the given screenshot:



Initially, the status will be displayed as '**Uploaded**'. When the user selects filing status as '**Uploaded**' the following screen is displayed with Transaction Details.
Refer the given screenshot:

Step 5



Reporting Entity PAN	PERHA8001W	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000728127	14/01/2017	-	Uploaded	

If the Uploaded Form is processed, the Filing status will be updated based on the validation done on the uploaded file and displayed as **Accepted/Rejected**. When the status appeared as 'Accepted' then the following screen is displayed to the user.

Step 6

[View Filed Form 61A](#)

Reporting Entity PAN	PERPA3000A	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000725741	12/01/2017	0	Accepted	

Click the 'Transaction No', the following details will be displayed -> Click the link 'ZIP' (To download the file)

Details Of Acknowledgement Number - 1000725741

Reporting Entity PAN	Calendar Year	Form Name
PERPA3000A	2016	FORM61A

Statement Details

Status	Acknowledgement Number	ZIP
Accepted	100383991120117	ZIP

If the status appeared as 'Rejected', the following screen will be displayed to the user.

Step 7

Dashboard My Account e-File

[View Filed Form 61A](#)

Reporting Entity PAN	PERHA8001W	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000728145	14/01/2017	-	Rejected	

Click the 'Transaction No', the error description is displayed on the screen.

Details Of Acknowledgement Number - 1000728145

Reporting Entity PAN	Calendar Year	Form Name
PERHA8001W	2016	FORM61A

Error Details

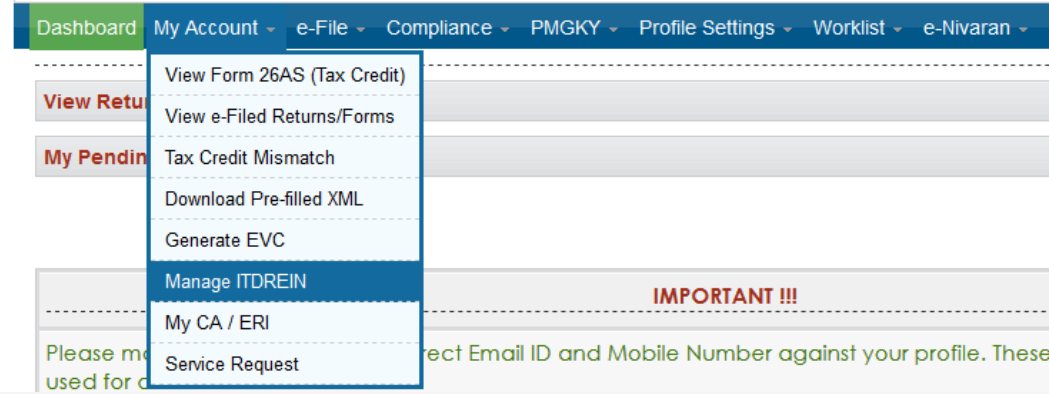

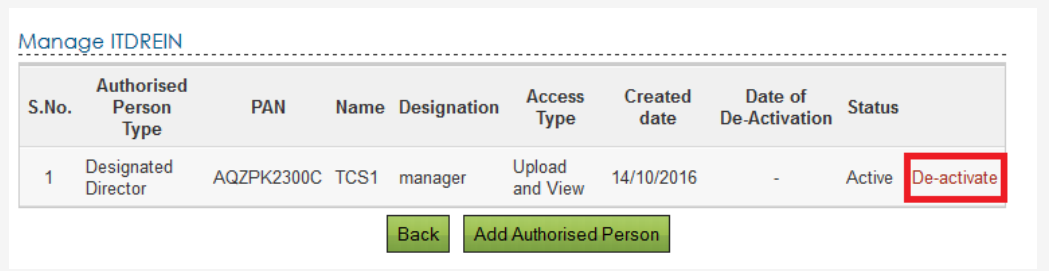
Status	Error Description
Rejected	The XML Schema is invalid. Please upload the XML in the correct schema.

Note:

The updated status can be checked after 24hr of upload.

8 Steps to De-activate Authorised Person

Perform the following steps to de-activate the authorised person:

- Step 1** Visit the 'e-Filing' Portal <http://incometaxindiaefiling.gov.in/>
- Step 2** Enter the 'User ID*', 'Password*' and 'Date of Birth*'. Click 'Login'.
- Step 3** Navigate to the '**My Account**' tab -> Click '**Manage ITDREIN**'
Refer the given screenshot.
- 
- Step 4** Click the '**ITDREIN**' under which the 'Authorised Person' needs to be de-activated.
Refer the given screenshot.
- 
- | S.No. | ITDREIN | Form Name | Reporting Entity Category | CreatedDate |
|-------|------------------|-----------|--------------------------------|-------------|
| 1 | PERPA1994D.AS708 | Form 61A | Securities market intermediary | 14/10/2016 |
| 2 | PERPA1994D.AI707 | Form 61A | Insurer | 14/10/2016 |
| 3 | PERPA1994D.AN706 | Form 61A | NBFC/Nidhi | 14/10/2016 |
| 4 | PERPA1994D.AB481 | Form 61A | Banking company | 21/07/2016 |
- Step 5** Click the '**De-activate**' link
- 
- | S.No. | Authorised Person Type | PAN | Name | Designation | Access Type | Created date | Date of De-Activation | Status |
|-------|------------------------|------------|------|-------------|-----------------|--------------|-----------------------|------------------------------------|
| 1 | Designated Director | AQZPK2300C | TCS1 | manager | Upload and View | 14/10/2016 | - | Active De-activate |
- Step 6** After clicking the de-activate link, a Success Message for De-activation will be displayed and the Date of De-activation will be recorded.

Manage ITDREIN

✔ Authorised Person De-activated Successfully.

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
1	Designated Director	PERPA5001A	USER	Designated Director	Upload and View	10/05/2016	11/05/2016	In-Active

[Back](#) [Add Authorised Person](#)

Step 7

To add another Authorised Person for the generated ITDREIN -> Click '**Add Authorised person**' and follow the same process as mentioned in 'Add Authorised Person'

Annexure 1

The following table represents the Form Codes and Form Types:

Table 3: Form Codes and From Types

Form Code	Form Type
Z	61
A	61A

The following table represents the Reporting Entity Category Code for Form 61 and Form 61A:

Table 4: Reporting Entity Category Code for Form 61 and Form 61A

Code	Reporting Entity Category	Reporting Entity Description
B	Banking company	Banking company
C	Co-operative bank	Co-operative bank
D	Depository	Depository, participant, custodian of securities or any other person registered under sub-section (1A) of section 12 of the Securities and Exchange Board of India Act, 1992
G	Government	Government or Inspector-General appointed under section 3 of the Registration Act, 1908 or Registrar or Sub-Registrar appointed under section 6 of that Act
I	Insurer	Insurer
M	Mutual Fund	Mutual Fund
N	NBFC/Nidhi	Non-banking financial company, Nidhi referred to in section 406 of the Companies Act, 2013 (18 of 2013);
P	Post Office	Post Office/Post master/ Post Master General
R	Reserve Bank of India	Reserve Bank of India
S	Securities market intermediary	Stock broker, sub-broker, share transfer agent, banker to an issue, trustee of a trust deed, registrar to issue, merchant banker, underwriter, portfolio manager, investment adviser and such other intermediaries registered under sub-section (1) section 12 of the Securities and Exchange Board of India Act, 1992
Z	Others	Others