e-Filing Registration and Services
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<th>CA</th>
<th>External Agency</th>
<th>ERI/ERI Sub User</th>
</tr>
</thead>
<tbody>
<tr>
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<td>View Form 26AS(Tax Credit)</td>
<td>e-Filed Returns/Forms</td>
<td>Token list</td>
<td>View Form 26AS(Tax Credit )</td>
</tr>
<tr>
<td>e-Filed Returns/Forms</td>
<td>e-Filed Returns/Forms</td>
<td>View Client List</td>
<td></td>
<td>e-Filed Returns/Forms</td>
</tr>
<tr>
<td>Refund / Demand Status</td>
<td>Refund / Demand Status</td>
<td>Refund/Demand Status</td>
<td></td>
<td>Refund/Demand Status</td>
</tr>
<tr>
<td>Refund Re-issue Request</td>
<td>Refund Re-issue Request</td>
<td>Refund Re-issue Request</td>
<td></td>
<td>Refund Re-issue Request</td>
</tr>
<tr>
<td>Rectification Request</td>
<td>Rectification Request</td>
<td>Rectification Request</td>
<td></td>
<td>Rectification Request</td>
</tr>
<tr>
<td>Rectification Status</td>
<td>Rectification Status</td>
<td>Rectification Status</td>
<td></td>
<td>Rectification Status</td>
</tr>
<tr>
<td>Request for Intimation u/s 143(1)/154</td>
<td>Request for Intimation u/s 143(1)/154</td>
<td>Request for Intimation u/s 143(1)/154</td>
<td></td>
<td>Request for Intimation u/s 143(1)/154</td>
</tr>
<tr>
<td>Register as Legal Heir</td>
<td>Add CA</td>
<td>Outstanding Tax Demand</td>
<td></td>
<td>Outstanding Tax Demand</td>
</tr>
<tr>
<td>Add CA</td>
<td>List / Dis-engage CA</td>
<td>Token List</td>
<td></td>
<td>Token List</td>
</tr>
<tr>
<td>List / Dis-engage CA</td>
<td>Response to Outstanding</td>
<td>Tax Credit Mismatch</td>
<td></td>
<td>Tax Credit Mismatch</td>
</tr>
<tr>
<td>Response to Outstanding Tax Demand</td>
<td>Dis-engage ERI</td>
<td></td>
<td></td>
<td>Dis-engage ERI</td>
</tr>
<tr>
<td>Dis-engage ERI</td>
<td>Tax Credit Mismatch</td>
<td></td>
<td></td>
<td>Tax Credit Mismatch</td>
</tr>
<tr>
<td>Tax Credit Mismatch</td>
<td>View Form 15CA</td>
<td></td>
<td></td>
<td>View Form 15CA</td>
</tr>
<tr>
<td>View Form 15CA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Individual User
Individual User Registration

An Individual should have a valid PAN for registering with the e-Filing application.

Registration Process

- Type in the URL of e-Filing application (https://incometaxindiaefiling.gov.in)

- Click on the 'Register Yourself' tab and select 'Individual' against the radio button found under “Individual/HUF”.

The user will be directed to the registration page and the user will fill the following fields for further validation.

- **PAN** – Mandatory, should be valid PAN.
- **Surname** – Mandatory, should be as per the PAN details.
- **First Name** – Not mandatory, should be as per the PAN details.
- **Middle Name** - Not mandatory, should be as per the PAN details.
- **Date of Birth** – Mandatory, should be as per the PAN details.
Click on the “Continue” button. The registration details page should be displayed.

A. Password Details

- **User ID** – This will be automatically populated by the system, which is entered in the Basic Details screen.
- **Password** – Mandatory, should be between 8 – 14 characters, alphanumeric and should contain at least one special character.
- **Confirm Password** – Mandatory, The user has to enter the same password as entered above.
- **Primary Secret Question** – Mandatory, The user needs to select any one question from available in the drop down.
- **Primary Secret Answer** – Mandatory.
- **Secondary Secret Question** – Mandatory, The user needs to select any one question from available in the drop down.
- **Secondary Secret Answer** – Mandatory.

B. Personal Details

These details could be automatically populated by previously entered basic details.

C. Contact Details

- **Landline Number** – Not mandatory.
- **Mobile Number** – Mandatory.
- **Alternate Mobile Number** - Non mandatory.
- **Email ID** – Mandatory, should be valid E-mail ID.
- **Alternate Email ID** - Non mandatory, should be valid E-mail ID.
- **Fax Number** – Non-mandatory.

Note: Same Mobile Number and Email ID can be used for a maximum of 10 assessees, as their Primary Contact details.
D. **Current Address**

- **Flat/Door/Building** – Mandatory.
- **Road/Street** – Non-mandatory.
- **Area/Locality** – Mandatory.
- **Town/City/District** – Mandatory.
- **State** – Mandatory, user selects from the drop down provided.
- **Pincode** – Mandatory.
- **Country** – Mandatory, user selects from the drop down provided.

E. **Subscribe to Mailing List**

This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list.

F. **Enable Alerts, reminder and notifications**

This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.

G. **Captcha**

This is mandatory and the user has to type in the numeric code which appears on the screen.
Click on ‘SUBMIT’. If it is success, user will be navigated to the “Registration successful” screen.

Registration Form - Individual

Thank you for registering in e-Filing. Your Transaction ID is 1000268681.

A link to activate your account has been emailed to eedfs@ffg.in and a OTP PIN has been sent to +91-

To activate your e-Filing account Please click on activation link and enter the OTP PIN received in your mobile number.

To Login to the e-Filing, you must activate your account. In case of any queries, please contact 1800-4250-0025.

The user receives a confirmation e-mail with an activation link to the registered Email ID. An SMS along with OTP (One time Password) is also sent to the registered Mobile number.

In order to activate the account, the user should click on the Activation link and enter the Mobile PIN. On success, the user account is activated and the database is updated.

For Non-Resident Indian, Mobile PIN is exempted.
Individual User Features

Forgot Password

In e-Filing application home page, click 'Login Here' button.

Click Forgot Password Link. Enter User ID and captcha

Click Continue

Select the option, Answer Secret Question.

I. Enter Date of Birth, Secret Question and Secret Answer
II. Click Submit. Enter New Password and Confirm Password.

![Reset Password](image1.png)

III. Click Submit

![Message](image2.png)

☑ Select the option, Upload Digital signature Certificate.

I. Select one of the option, Upload using .pfx file

![Reset Password](image3.png)

II. Click Submit. Enter New Password and Confirm Password.

![Reset Password](image4.png)

III. Click Submit

![Message](image5.png)

☑ Using OTP (PINs) –

The user must select one of the options mentioned below
If “Registered Email ID and Mobile Number” is chosen. PINs would be sent to registered Email ID and Mobile Number.

OR

If “New Email ID and Mobile Number” is chosen. User must enter additional details like 26AS TAN/OLTAS CIN/Bank Account Number. PINs would be sent to new Email ID and Mobile Number.

The user must enter the PINs received to the registered Email ID and Mobile Number and Click on “VALIDATE”.

On success, the user must enter the New Password and confirm the password.

Click Submit

- Your password has been updated successfully and the Transaction ID is: 1000094538. In case of any queries, please contact 1800 4250 0025.

d. Login through your net-banking account

Link “e-Filing login through NetBanking” is available which guides user to Login through net banking account.
Login

In browser, enter the URL of the e-Filing application (https://incometaxindiaefiling.gov.in).

Click ‘Login Here’ button. Enter User name (PAN/TAN), password, DOB and Captcha code

Click ‘Login’ button.

The user is requested to update a valid Mobile number and E-mail ID or confirm the Mobile number and Email ID already registered is their profile. (Department would share all critical communications only to the mobile number and Email ID registered in e-Filing portal.)

The user can edit his details and click on the “Continue” button.

User has to confirm the Contact details and Click on Continue button.
Or click on Back button to change the details.
A mobile PIN and email PIN will be sent to the primary mobile number and primary Email ID respectively.

Enter Mobile PIN and Email PIN in respective fields and click Continue button.

If the PINs are not received within the specified time (say 2 minutes), the taxpayer may opt for “Resend PINs” option. The PINs once received will be valid for 24 hours.

A success message will be displayed. The user can click on “Continue to Login” button wherein the user will be taken to the Dashboard.
Profile Settings

My Profile
In order to view or update ‘My Profile’, the user needs to perform the following steps

Step 1:
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

Step 2:
A screen with PAN details, Address and Contact Details will be displayed. ‘PAN Details’ is only a view. User cannot update the PAN details

Step 3:
In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

The new address has been saved in the Profile section of the e-filing portal. To change the address in PAN database, please follow the steps in PAN Change Request Form available at NSDL and UTI websites.
Step 4: In order to change the Contact details Click on ‘Contact Details’ tab and click on ‘Edit’ button.

The user can edit the details and click on the ‘Save’ button. Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.

Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows.

Change Password

Navigate to Profile Settings -> Change Password

Enter old password, new password, confirm password and click submit.
Change Secret Question and Answer

Navigate to Change Secret Question(s) and Answer(s).

Change Primary secret question, answer and Secondary secret question and answer. Click submit.

Register Digital Signature Certificate

Navigate to Profile settings -> Register digital signature certificate

Click Submit. Success message will be displayed on the screen.

Opt for Higher Security

Navigate to Profile settings->Opt for higher security
Upload and match the DSC. Click on ‘Enable’. Higher security option will be enabled.

Success message will be displayed on the screen.

Click Disable.

Success message will be display on the screen.

**My Account**

**View Form 26AS (Tax Credit)**

Navigate to My Account -> View Form 26 AS

Click Confirm. The user will be redirected to the TDS-CPC website.

**e-Filed Returns/Form**

Navigate to My Account -> e-Filed returns/Form

User will be able to see the status of returns/forms.
Click on the Acknowledgment number. The Details of the acknowledgment number is displayed as a pop up. User can download PDF, ITR-V for ITRs, XMLs and Receipts.

Refund/Demand Status

Navigate to My Account -> Refund/Demand Status

Refund/Demand Status is displayed.
Refund Reissue Request

Navigate to My Account -> Refund Reissue Request

Enter the CPC Reference Number, sequence number, DOB and click submit

Select Mode of Refund Reissue, bank account details, category and Click submit.

Rectification Request

Navigate to My Account -> Rectification request page

Select assessment year, enter communication reference number and click submit
Select the Rectification request type, fill in the necessary details and click submit.

**Rectification Return::SUCCESS**
Your rectification request has been successfully submitted and the Transaction ID is: 1000077630
In case of any queries, please contact 1800 4250 0025.

**Rectification Status**

Navigate to My Account -> Rectification Status

Select Assessment Year and Click Submit.

User is able to see the status of rectification.

**Rectification Status Details**

<table>
<thead>
<tr>
<th>PAN</th>
<th>A.Y.</th>
<th>ITR Name</th>
<th>Rectification Status No.</th>
<th>Rectification date</th>
<th>CPC Order</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAPA203W</td>
<td>2014</td>
<td>ITR-1</td>
<td>100112940161214</td>
<td>15/12/2014</td>
<td>CPC/1415/U1/1315995146</td>
<td>23/12/2012</td>
<td>Withdrawn already</td>
</tr>
<tr>
<td>AAAPA203W</td>
<td>2014</td>
<td>ITR-1</td>
<td>100112700031214</td>
<td>03/12/2014</td>
<td>CPC/1415/U1/1315995146</td>
<td>23/12/2012</td>
<td>Withdrawn already</td>
</tr>
<tr>
<td>AAAPA203W</td>
<td>2014</td>
<td>ITR-1</td>
<td>100112600021214</td>
<td>02/12/2014</td>
<td>CPC/1415/U1/1315995146</td>
<td>23/12/2012</td>
<td>Withdrawn already</td>
</tr>
<tr>
<td>AAAPA203W</td>
<td>2014</td>
<td>ITR-1</td>
<td>100112600021214</td>
<td>01/12/2014</td>
<td>CPC/1415/U1/1315995146</td>
<td>23/12/2012</td>
<td>Withdrawn already</td>
</tr>
</tbody>
</table>

*Please note that the withdrawal of rectification request is permitted only within 3 days of e-filing of relevant rectification request. In case the Bank Account Number has changed, then the Rectification Reference Number will be generated and acknowledgment available only after the response sheet received at CPC, Bangalore.

**Request for Intimation**

Navigate to My Account -> Request for Intimation
Select assessment year, category, sub-category and click submit.
Click submit

Register Legal Heir

Navigate to My Account -> Register Legal Heir

Provide the necessary details like Type of request, PAN, DOB, Surname, First Name, attach scanned copy of death certificate.

Click submit

The e-Filing Administrator will review/verify the request and approve/ not approve as applicable. e-Filing Administrator may approve as Temporary Legal Heir or Permanent Legal Heir, based on the documents uploaded. An e-mail is sent to the registered e-mail ID.
Add CA
Navigate to My Account -> Add CA
Enter the Membership no, select the form name and assessment year

Clicks submit. Success message should be displayed on the screen.

Individual assessee will be able to “Add CA” for the following set of Forms –

<table>
<thead>
<tr>
<th>Form Name</th>
<th>3AC</th>
<th>3CEA</th>
<th>6B</th>
<th>10CCBA</th>
<th>49C</th>
</tr>
</thead>
<tbody>
<tr>
<td>3AD</td>
<td>3CA-3CD</td>
<td>10B</td>
<td>10CCBC</td>
<td>56F</td>
<td></td>
</tr>
<tr>
<td>3AE</td>
<td>3CB-3CD</td>
<td>10BB</td>
<td>10CCBD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3CE</td>
<td>3CEB</td>
<td>10CCB</td>
<td>10CCC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once the assessee has added CA, CA will be able to upload the Forms on behalf of the assessee. Assessee can add one or more CAs for the same Form. Assessee can add CA for deceased PAN and hence CA will be able to upload Forms on behalf of the deceased PAN as well.

List/Disengage CAs

Navigate to My Account -> List/Disengage CAs
Advanced Search criteria is available to view the List/Disengage CAs
Click the ‘select’ check box in any row and click on Disengage. CA should be disengaged for the particular Form.

**Disengage ERI**

Navigate to My Accounts -> Disengage ERI

Click Disengage. ERI will be disengaged successfully

**Tax Credit Mismatch**

Navigate to My Account -> Tax Credit Mismatch

Select Assessment Year and Click Submit.

User is able to see the status of tax credit mismatch.
**View Form 15CA**
Navigate to My Account -> View Form 15CA to view the form 15CA upload by the assessee

**e-File**

**Upload Return**

Navigate to e-file -> Upload Return
Select the ITR form name, Assessment year and select the Xml.

Clicks submit
Success message will be displayed on the screen.

Click the hyperlink.
User should be able to see the ITR-V Acknowledgement.
Prepare and Submit ITR Online

Login and Navigate to e-file -> Prepare and Submit ITR Online
ITR 1 & ITR 4S is available Online.

For ITR 1, enter the details in the Personal Information tab, Income Details tab, TDS tab, Tax paid and Verification tab and 80G Tab.

For ITR 4S, enter the details in the Personal Information tab, Income Details tab, 44AE tab, TDS tab, Tax paid and Verification tab and 80G Tab.
Click submit

**Upload Return**

Your Return has been successfully uploaded and the Transaction ID is: 1000077634. In case of any queries, please contact 1800 4250 0025.

An e-mail confirming the successful submission of your Return along with the Acknowledgment number and ITR-V has been sent to ass@gst.gov.in.

Click here to download ITR-V

Please send the verified and signed ITR-V to the Income-Tax Department by ordinary post OR speed post ONLY within a period of 120 days from the date of transmitting the data electronically.

Address
Income Tax Department - CPC,
Post Bag No. 1,
Electronic City Post Office,
Bangalore - 560100,
Karnataka

On receipt of ITR-V, your Return will be sent for Processing.

**e-File in Response to Notice 139(9)**

Navigate to e-file --> e-file in response to Notice u/s 139(9)

Select the ITR Form name, assessment year, enter Acknowledgment Number and Click Submit.

If the PAN is present in the list of 1.46 Lakh cases where the Assessing Officer of certain jurisdictions have issued Demand Notice to assessees of their ward, in such cases upload the XML and submit the request.
If the PAN is not present in the list of these 1.46 Lakh cases then, enter communication reference number, CPC date, Receipt date, verification Pin and browse the file to attach the Xml.

Click Submit.

Success message will be displayed on the screen.

Your Return in response to Defective Notice dated 15/01/2013 has been successfully uploaded and the Acknowledgment Number is 567354269150113. The Transaction ID is: 1000077639. In case of any queries, please contact 1800-4250-0025.

An e-mail confirming the successful submission of your Return along with the Acknowledgment Number has been sent to scess@asff.com.

No further action needed from your side. Your Return will be sent for Processing.

**Change ITR Form Particulars**

Navigate to e-file --> Change ITR Form Particulars
Enter Acknowledgment Number and Click Submit.
User can change Bank Account Details; change Address Details, Email-ID, Mobile Number.

Success message is displayed as shown

Success

Your request for Change in ITR Form particulars have been submitted successfully and the Transaction ID is 10901138449.

Prepare and Submit Online Form (Other than ITR)

Navigate to e-file --> Prepare and Submit Form Online

Select the form name, assessment year and click “Submit”. Assessee will be able to fill the form and Submit the form for further processing.

<table>
<thead>
<tr>
<th>Form 8</th>
<th>Form 10BA</th>
<th>Form 10G</th>
<th>Form 41</th>
<th>Form 56D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 9</td>
<td>Form 10CCD</td>
<td>Form 10H</td>
<td>Form 49C</td>
<td>Form 56FF</td>
</tr>
<tr>
<td>Form 10</td>
<td>Form 10CCE</td>
<td>Form 35</td>
<td>Form 52A</td>
<td></td>
</tr>
<tr>
<td>Form 10A</td>
<td>Form 10E</td>
<td>Form 40C</td>
<td>Form 56</td>
<td></td>
</tr>
</tbody>
</table>
Response to Outstanding Tax Demand

Navigate to e-File -> Response to Outstanding Tax Demand

PAN is auto filled. Click on Submit.

The outstanding tax demand is displayed. User can submit the response and view the same.

For more details refer to the manual “Response to Outstanding Tax Demand” under Help section

Compliance

Compliance Module

Navigate to Compliance -> Compliance module

The user should provide details for the following:

- Filing of Income Tax Return – User has to enter the Response, Reason, Mode, and Date, Acknowledgement number and Circle/Ward and City.
- Related Information Summary – User has to enter Information Type and Related PAN details
Click Submit. A success message is displayed as shown below:

```
Compliance Details have been submitted successfully and the Transaction ID is: 1000185388
An e-mail confirming the successful submission of your Form along with the Acknowledgment number has been sent to vidya.k.murthy@gmail.com
Please go to Compliance -> View My Submission to check the status of the request
```

View My Submission

Navigate to Compliance -> View my Submission in order to view the status of the compliance form submitted will be available.

```
<table>
<thead>
<tr>
<th>S No.</th>
<th>Transaction ID</th>
<th>Compliance Ack Number</th>
<th>Type</th>
<th>Submitted On</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000165051</td>
<td>1000021230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>2</td>
<td>1000165050</td>
<td>1000020230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>3</td>
<td>1000165039</td>
<td>1000020230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>4</td>
<td>1000165039</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>5</td>
<td>1000165038</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>6</td>
<td>1000165037</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>7</td>
<td>1000165036</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>8</td>
<td>1000165035</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>9</td>
<td>1000165034</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
<tr>
<td>10</td>
<td>1000165033</td>
<td>10000160230114</td>
<td>Revised</td>
<td>23/01/2014</td>
</tr>
</tbody>
</table>
```

30
Download

Income Tax Returns

Navigate to Downloads->Income Tax returns
Select the assessment year from the dropdown and click on download button.

Form BB (Return of Net Wealth)

Navigate to Downloads-> Form BB (Return of Net Wealth)
Select the assessment year from the dropdown and click on download button.

Forms (Other than ITR)

Navigate to Downloads-> Forms (Other than ITR)
Select the assessment year from the dropdown and click on download button.
Download Pre-filled XML

Navigate to Downloads -> Download Prefill Xml

Select the assessment year and click submit. User will be able to view the prefilled xml.

My Request List

Navigate to My Request List -> My Request List.

Select an option and click submit

Add Legal Heir List is displayed as
Request for Intimation list is displayed as

![My Intimation Request List](image)

Refund Reissue request list is displayed as

![My Refund Reissue Request List](image)

Change ITR Form Particulars is displayed as

![Change ITR Form Particulars](image)

**Worklist**

**For Your Action**

Navigate to For Your Action. This functionality provides information on the pending actions at user’s end. For below mentioned services pending action shall be displayed in this menu:

- Details of defective returns
- ITR-V not received / rejected
- Details of Outstanding demand
- View Uploaded Form Details
- Compliance
- Refund Unpaid/Failed

Click on any of the above links, User will be taken to particular pending action to complete the activity.

**For Your Information**

Navigate to For Your Information. Assessee will be able to view the approved/rejected forms submitted by CA on behalf him/her.
For Your Information

<table>
<thead>
<tr>
<th>Sl.No</th>
<th>CA Name</th>
<th>Form Name</th>
<th>A.Y.</th>
<th>Submitted On</th>
<th>Approval Status</th>
<th>View Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SWAMY AAA RAM</td>
<td>Form 104CD</td>
<td>2014-15</td>
<td>04/11/2014</td>
<td>Successfully e-filed</td>
<td>View Form</td>
</tr>
<tr>
<td>2</td>
<td>SWAMY AAA RAM</td>
<td>Form 65F</td>
<td>2014-15</td>
<td>28/10/2014</td>
<td>Successfully e-filed</td>
<td>View Form</td>
</tr>
<tr>
<td>3</td>
<td>SWAMY AAA RAM</td>
<td>Form 6B</td>
<td>2014-15</td>
<td>13/10/2014</td>
<td>Successfully e-filed</td>
<td>View Form</td>
</tr>
</tbody>
</table>

Click on “View Form”.

Helpdesk

Submit Request

GO to Help Desk - Click Submit Grievance

User selects Grievance Related to CPC or e-Filing.

Enters the required details and Clicks submit. Success message is display on the screen.

Grievance Status

Navigate to Help Desk - Click Grievance Status.

User will be able to see the status of the submitted grievance.
Other than Individual/HUF Users
Other than Individual/HUF User Registration

Before Other than Individual/HUF User registers in the new e-Filing application, the following conditions should be met.

A Other than Individual/HUF Users should

- Have a valid PAN and a Digital Signature Certificate (DSC is mandatory only for Company)
- Be a registered user in the e-Filing application to avail the services of e-Filing

REGISTRATION PROCESS

Type the URL of the e-Filing application in a browser.

Click on the ‘Register Yourself’ tab and select ‘Company’ against the radio button found under “Other than Individual/HUF”.

2. The user will be directed to the registration page and the user will fill the following fields for further validation.

- PAN - Mandatory, 10 character alphanumeric
- **Organization Name** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- **Date of Incorporation** – Mandatory, select the date from the calendar provided

**Registration Form - Corporate Registration**

3. User clicks ‘CONTINUE’ and the PAN details are validated and the user credentials are validated with the ICAI database available with e-Filing application.

4. On success, the user is directed to the Registration details page and the user needs to enter the following details.

**A. Password Details**

- **User ID** – This will be automatically populated by the system which is already provided at step-1 basic details
- **Password** – Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **Confirm Password** – The user has to enter the same password as entered above. This is mandatory.
- **Primary Secret Question** – The user needs to select any one question out of four available in the drop down. This is mandatory.
- **Primary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters
- **Secondary Secret Question** – The user needs to select any one question out of the balance three available in the drop down. This is mandatory.
- **Secondary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters

**B. Personal Details of Principal Contact**

- **PAN** - Mandatory, 10 characters alphanumeric, if director is an NRI, then PAN is not mandatory.
- **Designation** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- **Surname** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- **First Name** – Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- **Middle Name** - Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- **Date of Birth** – Mandatory, select the date from the calendar provided, and should match the date as
given in the PAN card

C. Contact Details

➢ **Landline Number** – Non-mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).

➢ **Mobile Number** - Mandatory, numeric field, 10 digits.

➢ **Alternate Mobile Number** - Non mandatory, numeric field, 10 digits

➢ **Email ID** - This field is auto-filled from the previous page

➢ **Alternate Email ID** - Non mandatory, alphanumeric, 125 characters

➢ **Fax Number** - Non-mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).

D. Corporate office of Postal Address

➢ **Flat/Door/Building** – Mandatory, alphanumeric and special characters, limited to 50 characters

➢ **Road/Street** - Non-mandatory, alphanumeric and special characters, limited to 50 characters

➢ **Area/Locality** - Mandatory, alphanumeric and special characters, limited to 50 characters

➢ **Town/City/District** - Mandatory, alphanumeric and special characters, limited to 50 characters

➢ **State** – Mandatory, user selects from the drop down provided

➢ **Pin code** - Mandatory, numeric, limited to 6 digits

➢ **Country** – Mandatory

E. Digital Signature Certificate

➢ Mandatory only for the company user

F. Subscribe to Mailing List

➢ This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list

G. Enable Alerts, Reminders and Notifications

➢ This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.

H. Captcha Code

➢ This is mandatory and the user has to type in the numeric code which appears on the screen.
**Registration Form - Corporate Registration**

Step 1: Enter Basic Details  
Step 2: Registration Form  
Step 3: Registration Successful

### Password Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>AAABR2926P</td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
</tr>
<tr>
<td>Primary Secret Question *</td>
<td>Select</td>
</tr>
<tr>
<td>Primary Secret Answer *</td>
<td></td>
</tr>
<tr>
<td>Secondary Secret Question *</td>
<td>Select</td>
</tr>
<tr>
<td>Secondary Secret Answer *</td>
<td></td>
</tr>
</tbody>
</table>

### Personal Details of Principal Contact

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designation</td>
<td></td>
</tr>
<tr>
<td>Surname</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Date of Birth (DD/MM/YYYY) *</td>
<td></td>
</tr>
</tbody>
</table>

### Contact Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline Number *</td>
<td>+91</td>
</tr>
<tr>
<td>Mobile Number of the Principal Contact *</td>
<td>+91</td>
</tr>
<tr>
<td>Alternate Mobile Number</td>
<td>+91</td>
</tr>
<tr>
<td>E-mail ID of the Principal Contact *</td>
<td></td>
</tr>
<tr>
<td>Alternate E-mail ID</td>
<td></td>
</tr>
<tr>
<td>Fax Number *</td>
<td>+91</td>
</tr>
</tbody>
</table>

### Corporate Office Postal Address

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat/Door/Building *</td>
<td></td>
</tr>
<tr>
<td>Road/Street</td>
<td></td>
</tr>
<tr>
<td>Area/Locality *</td>
<td></td>
</tr>
</tbody>
</table>
User clicks on 'SUBMIT' and the fields are validated for correctness. The user records are captured in the e-Filing application.

Registration Form - Other than Individual/HUF

Step 1: Enter Basic Details  Step 2: Registration Form  Step 3: Registration Successful

Thank you for registering in e-Filing. Your Transaction ID is 1000268699.

A link to activate your account has been emailed to edfs@ffg.in and a OTP PIN has been sent to +91-8888888888.

To activate your e-Filing account please click on activation link and enter the OTP PIN received in your mobile number.

To login to the e-Filing, you must activate your account. In case of any queries, please contact 1800-4250-0025.

- The user receives a confirmation e-mail with an activation link to the registered Email ID. An SMS along with OTP (One Time Password) is sent to the registered Mobile number.

- In order to activate the account, the user should click on the Activation link and enter the Mobile PIN. On success, the user account is activated and the database is updated.
Other than Individual/HUF User Features

Login

Step 1:
Type the URL (https://incometaxindiaefiling.gov.in/) of e-Filing application in a browser.

Step 2:
Click 'Login Here' and enter the User ID, Password, Date of Birth/Incorporation and Captcha code. Click on the Login' button below.

Step 3:
On a successful login, the user will now be able to view his profile (Dashboard). The top right corner of the profile will let the User know about his/her 'Last Login' with the date stamp and time. There are also links provided like

- About us
- Feedback
- Contact Us
- Help

The dashboard displays a set of quick links on the left, which will help the User navigate through the pages.
The quick links provided are as follows:

- Upload Return
- View form 26AS (Tax Credit)
- Rectification Request
- Download ITR
- Tax Calculator
- e-Filings Do's & Don't
- ITRV- Do's & Don't

The profile also shows the various tabs along with their functionalities as follows:

The 'My Account' tab has the following functionalities:

- View Form 26AS
- Refund/Demand Status
- e-Filed Returns and Forms
- Rectification Request
- Rectification Status
- Request for Intimation
- Add CA
- List of CA
- Dis-engage ERI
- Tax Credit Mismatch
- View Form 15CA

The 'e-File' tab has the following functionalities:

- Upload Returns
- e-File in Response to notice U/S 139(9).
- Change ITR Form Particulars
- Prepare and Submit Online Form (Other than ITR)
- Upload Form BB (Return on Net Wealth)
- Response to Outstanding Tax Demand

The 'Compliance' tab has the following functionalities:

- Compliance Module
- View My Submission
The 'Download' tab has the following functionalities:
• Income Tax Returns
• Forms (Other than ITR)
• Download Pre-filled XML
• Form BB (Return on Net Wealth)

The 'Profile Settings' tab has the following functionalities:
• My Profile
• Change Password
• Change Secret Question /Answer
• Register Digital Certificate
• Opt for Higher Security

The 'My Request List' tab has the following functionalities:
• My Request List

The 'Worklist' tab has the following functionalities:
• For Your Action
• For Your Information

The 'Helpdesk' tab provides the following functionalities:
• Submit Grievance
• Grievance Status

Login

In browser, enter the URL of the e-Filing application (https://Incometaxindiaefiling.gov.in).

Click 'Login Here' button. Enter User ID, password and Date of Incorporation
Click Login. The user is requested to update a valid Mobile number and E-mail ID or confirm the Mobile number and Email ID already registered is their profile. (Department would share all critical communications only to the mobile number and Email ID registered in e-Filing portal.)

The user can edit his details and click on the “Continue” button.

User has to confirm the Contact details and Click on Continue button. Or click on Back button to change

A mobile PIN and email PIN will be sent to the primary mobile number and primary Email ID respectively.

Enter Mobile PIN and Email PIN is respective fields and click Continue button

If the PINs are not received within specified time (say 2 minutes), the taxpayer may opt for “Resend PINs” option. The PINs once received will be valid for 24hours.
A success message will be displayed. The user can click on “Continue to Login” button wherein the user will be taken to the Dashboard.

**Validate Contact Success**

Thank you for validating your contact details with e-Filing. Your Contact details are updated successfully.

The contact details will be used for all future communications including reset of password.

[Continue To Login]

**Dashboard**

Click to view Returns / Forms

**IMPORTANT !!!**

Please make sure you have the correct Email ID and Mobile Number against your profile. These details are important and will be used for all communications.

To update the details, please go to the menu “Profile Settings/My Profile”

**My Account**

**View Form 26AS**

In order to View the Form 26AS, the User must perform the following steps:

**Step 1:**
Go to ‘My Account’ tab and Click on the ‘View Form 26AS’ button.

**Step 2:**
The User will be notified about being directed to the TDS-CPC website to view the Form 26AS. Click on the ‘Confirm’ button to view the 26AS statement.
e-Filed Returns/Forms

In order to View the Returns/Forms, the User must perform as follows:

**Step 1:**
Go to the 'My Account' tab and Click on the 'e-Filed Returns/Form'. The User will be able to view the Returns/Forms now.

Click on the Acknowledgement number. The Details of the acknowledgement number is displayed as a popup.

Refund/Demand Status

In order to check the refund/Demand Status, the User must perform the following steps:

**Step 1:** Go to 'My Account' tab and Click on the 'Refund/Demand Status' button.

**Step 2:**
The User will now be able to view the status of Refund/Demand.
Refund Re-issue Request

In order to Refund Reissue Request, the User must perform the following steps:

**Step 1:**
Go to 'My Account' tab and Click on the 'Refund Reissue Request' link.

**Step 2:**
Enter the CPC Reference Number, sequence number, Date of Birth, and Click on the 'Submit' button.

**Step 3:**
Select the Mode of Refund Reissue, bank account details and the category. Click on the 'Submit' button.

**Step 4:**
A success message will be displayed on the screen.

Request for Intimation

In order to Request for Intimation, the User must perform the following steps:

**Step 1:**
Go to 'My Account' tab and Click on the 'Request for Intimation' link.

**Step 2:**
Select assessment year, category and sub-category. Click on the 'Submit' button.
Rectification Request

In order to submit the Rectification Request, the User must perform the following steps:

**Step 1:**
Go to 'My Account' tab and Click on the 'Rectification Request' link.

**Step 2:**
Select assessment year, enter communication reference number and Click 'Submit' button.

**Step 3:**
Select the Rectification request type, fill the required details and Click on the 'Submit' button.
Step 4:  
A success message will be displayed on the Screen.

Rectification Return: SUCCESS  
Your rectification request has been successfully submitted and the Transaction ID is: 1000077630. 
In case of any queries, please contact 1800 4250 0025.

Rectification Status

In order to view the Rectification status, the User must perform the following steps:

Step 1:
Go to the 'My Account' tab and Click on the 'Rectification status' link.  
The User must provide all the mandatory fields  
Click on the 'Submit' button.

Rectification Status

Step 2:
The User will now be able to see the status of rectification.

Add CA

In order to add a new CA (Chartered Accountant), the user must perform the following steps:

Step 1:
Go to 'My Account' tab and click on the 'Add CA' link.  
The User must enter all the mandatory fields required to add a new CA, and Click on the ‘Submit’ button.
On successful addition of a new CA, a successful message will be displayed on the screen.

Other than Individual/HUF assessee will be able to “Add CA” for the following set of Forms -
Once the assessee has added CA, CA will be able to upload the Forms on behalf of the assessee. 
Assessee can add one or more CAs for the same Form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Assessee can add one or more CAs for the same Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>3AC</td>
<td>CA can upload the Form on behalf of the assessee.</td>
</tr>
<tr>
<td>3CEA</td>
<td></td>
</tr>
<tr>
<td>6B</td>
<td></td>
</tr>
<tr>
<td>10CCBA</td>
<td></td>
</tr>
<tr>
<td>10CCF</td>
<td></td>
</tr>
<tr>
<td>63</td>
<td></td>
</tr>
<tr>
<td>49C</td>
<td></td>
</tr>
<tr>
<td>3AD</td>
<td></td>
</tr>
<tr>
<td>3CA-3CD</td>
<td></td>
</tr>
<tr>
<td>10B</td>
<td></td>
</tr>
<tr>
<td>10CCBC</td>
<td></td>
</tr>
<tr>
<td>10DA</td>
<td></td>
</tr>
<tr>
<td>64</td>
<td></td>
</tr>
<tr>
<td>56F</td>
<td></td>
</tr>
<tr>
<td>3AE</td>
<td></td>
</tr>
<tr>
<td>3CB-3CD</td>
<td></td>
</tr>
<tr>
<td>10BB</td>
<td></td>
</tr>
<tr>
<td>10CCBD</td>
<td></td>
</tr>
<tr>
<td>29B</td>
<td></td>
</tr>
<tr>
<td>65</td>
<td></td>
</tr>
<tr>
<td>63A</td>
<td></td>
</tr>
</tbody>
</table>

List/Dis-engage CA

In order to View the List/ Dis-engage CA’s, the User must perform the following steps:

**Step1:**
Go to ‘My Account’ and Click on the List/ Dis-engage CA's ' link.
User will now be able to see the list of CA’s.
**Dis-engage ERI**

In order to Dis-engage an ERI, The User must perform the following steps:

**Step 1:**
Go to 'My Account' tab and Click on the 'Dis-Engage ERI' link.
Click on the 'dis-engage' button.

**Step 2:**
The User can Dis-engage the Services of ERI.

---

**Tax Credit Mismatch**

Navigate to My Account -> Tax Credit Mismatch

Select Assessment Year and Click Submit.

User is able to see the status of tax credit mismatch.
View Form 15CA

Navigate to My Account -> View Form 15CA to view the form 15CA upload by the assessee.

e-File

UPLOAD RETURN

In order to upload a Return the user must perform the following steps:

Step 1:
Go to the ‘e-File’ tab and Click on the ‘Upload Return’ link.

Step 2:
Enter all the mandatory fields and Click on the ‘Submit’ button. The respective Success message will be displayed on the screen.

Step 3:
The user can click on the hyperlink that says ‘Click here’ and download the ITR-V form.
**e-File in Response to Notice u/s 139 (9)**

In order to file a defective return, the User must perform the following steps:

**Step 1:**
Go to the ‘e-File’ tab and click on the ‘e-File in response to Notice u/s 139 (9)’ link.

**Step 2:**
The User must select the ITR form name and the assessment year from the dropdown.

**Step 3:**
Click on the ‘Submit’ button. The User will be able to upload the defective return. If the PAN is present in the list of 1.46 Lakh cases where the Assessing Officer of certain jurisdictions have issued Demand Notice to assessee of their ward, for such cases upload the XML and submit the request.

If the PAN is not present in the list of these 1.46 Lakh cases than, enter communication reference number, CPC date, Receipt date, verification PIN and browse the file to attach the XML.

Click Submit.

Success message will be displayed on the screen.
Change ITR Form Particulars

Navigate to e-file --> Change ITR Form Particulars Enter Acknowledgment Number and Click Submit.

User can change Bank Account Details, change Address Details, Email-ID, Mobile Number and Change filing with DSC within 7 days of filing the ITR Return.

Success message is displayed as shown

Prepare and Submit Online Form (Other than ITR)

Navigate to e-file --> Submit Form Online

Select the form name, assessment year and click “Submit”. Assessee will be able to fill the form and Submit the form for further processing.

For other than Individual/HUF user, following are the Forms available –

<table>
<thead>
<tr>
<th>Form 3CF-I</th>
<th>Form 10</th>
<th>Form 41</th>
<th>Form 63</th>
<th>Form 56FF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 3CF-II</td>
<td>Form 10A</td>
<td>Form 52A</td>
<td>Form 63A</td>
<td></td>
</tr>
<tr>
<td>Form 3CF-III</td>
<td>Form 10G</td>
<td>Form 56</td>
<td>Form 64</td>
<td></td>
</tr>
<tr>
<td>Form 8</td>
<td>Form 35</td>
<td>Form 56D</td>
<td>Form 65</td>
<td></td>
</tr>
<tr>
<td>Form 9</td>
<td>Form 40C</td>
<td>Form 62</td>
<td>Form 49C</td>
<td></td>
</tr>
</tbody>
</table>
Response to Outstanding Tax Demand

Navigate to e-File -> Response to Outstanding Tax Demand

PAN is auto filled. Click on Submit.

The outstanding tax demand is displayed. User can submit the response and view the same.

For more details refer for to the manual “Response to Outstanding Tax Demand” under Help section

Compliance

Compliance Module

Navigate to Compliance -> Compliance module

The user should provide details for the following:

A. Filing of Income Tax Return – User has to enter the Response, Reason, Mode, Date, Acknowledgement number and Circle/Ward and City.

B. Related Information Summary – User has to enter Information Type and Related PAN details
Click in Submit. A success message is displayed as shown below

**Compliance Details**

Compliance Details has been submitted successfully and the Transaction ID is: 1000165080

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

Please go to Compliance—>View My Submission to check the status of the request

**View My Submission**

Navigate to Compliance -> View my Submission in order to view the status of the compliance form submitted will be available.
Download

Income Tax Returns
Navigate to Downloads->Income Tax returns
Select the assessment year from the dropdown and click on download button.

Form BB (Return of Net Wealth)
Navigate to Downloads-> Form BB (Return of Net Wealth)
Select the assessment year from the dropdown and click on download button. **Note:** Applicable only PAN with 4th letter ‘C’.
Forms (Other than ITR)

Navigate to Downloads -> Forms (Other than ITR)
Select the assessment year from the dropdown and click on download button.

Download Pre-filled XML

Navigate to Downloads -> Download Prefill Xml
Select the assessment year and click submit. User will be able to view the prefilled xml.

Profile Settings

My Profile
In order to view or update ‘My Profile’, the user needs to perform the following steps

Step 1:
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

Step 2:
A screen with PAN details, Principal Contact details, Address and Contact Details will be displayed.
‘PAN Details’ is only a view. User cannot update the PAN details
Step 3:
In order to change the Principal Contact details Click on 'Principal Contact' tab and click on the 'Edit' button.

Update the required fields and click on 'Save' button. A success message is displayed as shown.
Step 4: In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

Step 5: In order to change the Contact details Click on ‘Contact Details’ tab and click on ‘Edit’ button.

The user can edit the details and click on the ‘Save’ button. Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.
Enter the Mobile PIN and Email PIN. Click on confirm.

A success message will be displayed as follows

**Change Password**

In order to change the password, the user needs to perform the following steps

**Step 1:**
Go to the 'Profile settings' and Click on the 'Change Password' link.

**Step 2:**
The User needs to enter the mandatory details (*) then Click on the 'Submit' button and the fields are validated for correctness.

Once the password is changed successfully, a 'success' message will be displayed on the Screen.
**Change Secret Question(s) / Answer(s)**

In order to change the secret question / answer, the user needs to perform the following steps:

**Step 1:**
Go to ‘Profile settings’ and Click on the ‘Change Secret question/Answer’ link.

![Change Secret Question(s) / Answer(s)](image)

**Step 2:**
User needs to enter all the mandatory fields like the Primary and Secondary questions and their respective answers.

Click on the 'Submit' button.
The fields are validated for correctness and a Success Message is displayed on the Screen.

![Success](image)

**Register Digital Signature Certificate**

In order to register the Digital Signature Certificate, the user needs to perform the following steps:

**Step 1:**
Go to ‘Profile Settings’ and Click on the 'Register Digital Signature Certificate' link.

**Step 2:**
The User needs to select either on the 'Sign with .pfx file' or the 'Sign with your USB token' against the radio button.
Click on the 'Submit' button.

![Register Digital Signature Certificate](image)

**Step 3:**
A Success Message will be displayed on the Screen as shown below.

Opt for Higher Security

In order to opt for Higher Security, the user needs to perform the following steps:

**Step 1:**
Go to ‘Profile Settings’ and Click on the ‘Opt for Higher Security’ link. The User can either enable or disable the higher security as he/she wishes.

**Step 2:**
The User Clicks on the ‘Enable’ button. The respective Success Message will be displayed on the Screen.

If the User clicks on the ‘Disable’ button. The respective Success Message will be displayed on the Screen.
My Request List

Navigate to My Request List -> My Request List.

Select an option and click submit

Based on the option chosen, My Request List should be displayed.

Request for Intimation list is displayed as

Forms requested List is displayed as

Refund Reissue Request List is displayed as

Change ITR Form Particulars List is displayed as

Worklist

For Your Action

Navigate to For Your Action. This functionality provides information on the pending actions at user’s end

For below mentioned services pending action shall be displayed in this menu

- Details of defective returns
- ITR-V not received / rejected
• Details of Outstanding demand
• View Uploaded Form Details
• Compliance
• Refund Unpaid/Failed

Click on any of the above links, User will be taken to particular pending action to complete the activity

**For Your Information**

Navigate to For Your Information.
Assessee will be able to view the approved/rejected forms submitted by CA on behalf him/her.

<table>
<thead>
<tr>
<th>Sl.No</th>
<th>CA Name</th>
<th>Form Name</th>
<th>A.Y.</th>
<th>Submitted On</th>
<th>Approval Status</th>
<th>View Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SWAMY AAA RAM</td>
<td>Form 10CCB</td>
<td>2014-15</td>
<td>04/11/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
<tr>
<td>2</td>
<td>SWAMY AAA RAM</td>
<td>Form 56F</td>
<td>2014-15</td>
<td>28/10/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
<tr>
<td>3</td>
<td>SWAMY AAA RAM</td>
<td>Form 6B</td>
<td>2014-15</td>
<td>13/10/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
</tbody>
</table>

Click on “View Form”.

**Helpdesk**

**Submit Request**

GO to Help Desk -Click Submit Grievance

User selects Grievance Related to CPC or e-Filing.

Enters the required details and Clicks submit. Success message is display on the screen.

**Grievance Status**

Navigate to Help Desk -Click Grievance Status.

User will be able to see the status of the submitted grievance.
HUF User
HUF Registration

- In Browser, type the URL of the e-Filing application. (https://incometaxindiaefiling.gov.in/)

- Click on the ‘Register Yourself’ tab and select ‘HUF’ against the radio button found under “Individual/HUF”.

- Click on the “Continue” button to proceed.

- The user will be directed to the registration page and the user will fill the following fields for further validation.

  - PAN Number – Mandatory, alphanumeric, limited to 10 digits
  - Name of the HUF – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
Date of Incorporation – Mandatory, select the date from the calendar provided, and should match the date as given in the PAN card

Registration Form - HUF

Step 1: Enter Basic Details  Step 2: Registration Form  Step 3: Registration Successful

Instructions
- Fields marked with asterisk (*) are mandatory.
- Please enter the HUF's PAN, Name and Date of Incorporation.
- Select Date of Incorporation using the calendar provided.
- All error messages will be displayed on the screen.

3. If user clicks on ‘CONTINUE’ button then PAN detail is validated and the individual user credentials are validated with the ICAI database which are available with e-Filing application

- On success, the user is directed to the Registration details page and the user needs to enter the following details.

Password Details

- User ID – This will be automatically populated by the system, which user had entered in the Basic Details.
- Password – Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- Confirm Password – Mandatory, The user has to enter the same password as entered above.
- Primary Secret Question – Mandatory, The user needs to select any one question out of four available in the drop down.
- Primary Secret Answer – Mandatory, alphanumeric and special characters, limited to 25 characters.
- Secondary Secret Question – Mandatory, The user needs to select any one question out of the balance three available in the drop down.
- Secondary Secret Answer – Mandatory, alphanumeric and special characters, limited to 25 characters.

B. Personal Details of Karta

- Surname – Mandatory, alphanumeric and must be validated with the PAN Database.
- Middle Name – Not Mandatory, alphanumeric and special characters, limited to 25 characters.
- First Name – Not Mandatory, alphanumeric and special characters, limited to 25 characters.
- PAN – Mandatory, 10 character alphanumeric
- Date of Birth – Mandatory, select the date from the calendar provided

C. Contact Details

- Landline Number – Not mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).
- Mobile Number - Mandatory, numeric field, 10 digits. This field is auto-filled from the previous page
- Alternate Mobile Number - Non mandatory, numeric field, 10 digits
- Email ID – Mandatory, This field is auto-filled from the previous page
- Alternate Email ID - Non mandatory, alphanumeric, 125 characters
- Fax Number - Non-mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).
D. Postal Details

- **Flat/Door/Building** – Mandatory, alphanumeric and special characters, limited to 50 characters
- **Road/Street** - Non-mandatory, alphanumeric and special characters, limited to 50 characters
- **Area/Locality** - Mandatory, alphanumeric and special characters, limited to 50 characters
- **Town/City/District** - Mandatory, alphanumeric and special characters, limited to 50 characters
- **State** – Mandatory, user selects from the drop down provided
- **Pincode** - Mandatory, numeric, limited to 6 digits

E. Digital Signature Certificate (DSC)

User can upload this DSC to make his account permanent.

F. Subscribe to Mailing List

This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list

F. Enable Alerts, reminder and notifications

This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.

G. CAPTCHA

This is mandatory and the user has to type in the numeric code which appears on the screen
<table>
<thead>
<tr>
<th><strong>Date of Birth</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Details</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Landline Number</strong></td>
<td>+91</td>
<td></td>
</tr>
<tr>
<td><strong>Mobile Number of the Karta</strong></td>
<td>+91</td>
<td></td>
</tr>
<tr>
<td><strong>Alternate Mobile Number</strong></td>
<td>+91</td>
<td></td>
</tr>
<tr>
<td><strong>E-mail ID of the Karta</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Alternate E-mail ID</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Fax Number</strong></td>
<td>+91</td>
<td></td>
</tr>
<tr>
<td><strong>Postal Address</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Flat/Door/Building</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Road/Street</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Area/Localita</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Town/City/District</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pincode</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>Select</td>
<td></td>
</tr>
<tr>
<td><strong>Country</strong></td>
<td>India</td>
<td></td>
</tr>
<tr>
<td><strong>Digital Signature Certificate</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Do you want to register your Digital Signature Certificate?</strong></td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td><strong>Upload valid Digital Signature Certificate of the PAN provided above</strong></td>
<td>Sign with .pfx file</td>
<td>Sign with your USB token</td>
</tr>
<tr>
<td><strong>Subscribe to E-mail and Alerts</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Enable Alerts</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subscribe to Mailing List</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Captcha Code</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Image</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Enter the number as in above image</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit
User clicks ‘SUBMIT’ and the fields are validated for correctness. The user records are captured in the e-Filing application. If not, the user will be intimated on unsuccessful registration.

The user receives a confirmation e-mail with an **activation link to the registered Email ID**. An SMS along with OTP (One time Password) is also sent to the registered Mobile number.

In order to activate the account, the user should click on the **Activation link and enter the Mobile PIN**. On success, the user account is activated and the database is updated.
HUF Features

Login

In browser, enter the URL of the e-Filing application (https://Incometaxindiaefiling.gov.in). Click ‘Login Here’ button. Enter user name, password, DOB and Captcha

Click Login.

The user is requested to update a valid Mobile number and E-mail ID or confirm the Mobile number and Email ID already registered is their profile. (Department would share all critical communications only to the mobile number and Email ID registered in e-Filing portal.)

The user can edit his details and click on the “Continue” button.

User has to confirm the Contact details and Click on Continue button. Or click on Back button to change

A mobile PIN and email PIN will be sent to the primary mobile number and primary Email ID respectively.

Enter Mobile PIN and Email PIN is respective fields and click Continue button

If the PINs are not received within specified time (say 2 minutes), the taxpayer may opt for “Resend PINs” option. The PINs once received will be valid for 24hours.
A success message will be displayed. The user can click on “Continue to Login” button wherein the user will be taken to the Dashboard.

Forgot Password
In e-Filing application home page, click ‘Login Here’ button.

Click Forgot Password Link. Enter User ID and captcha
Click Continue

a) Select the option, Answer Secret Question.

Enter Date of Birth, Secret Question and Secret Answer

Click Submit. Enter New Password and Confirm Password.

Click Submit

Select the option, Upload Digital signature Certificate.

Select one of the option, Upload using .pfx file
Click Submit. Enter New Password and Confirm Password.

Using OTP (PINs) –
The user must select one of the options mentioned below

If “Registered Email ID and Mobile Number” is chosen, PINs would be sent to registered Email ID and Mobile Number.

OR

If “New Email ID and Mobile Number” is chosen, User must enter additional details like 26AS TAN/OLTAS CIN/ Bank Account Number.

PINs would be sent to new Email ID and Mobile Number.

The user must enter the PINs received to the registered Email ID and Mobile Number and Click on “VALIDATE.”
On success, the user must enter the New Password and confirm the password.

Click Submit

Profile Settings

My Profile
In order to view or update ‘My Profile’, the user needs to perform the following steps

Step 1:
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

Step 2:
A screen with PAN details, Principal Contact details, Address and Contact Details will be displayed. ‘PAN Details’ is only a view. User cannot update the PAN details

Step 3:
In order to change the Principal Contact details Click on ‘Principal Contact’ tab and click on the ‘Edit’ button.
Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

Step 4:
In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.
Step 5: In order to change the Contact details Click on 'Contact Details' tab and click on 'Edit' button.

The user can edit the details and click on the 'Save' button.
Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.

Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows
Change Password

Navigate to Profile Settings -> Change Password

![Change Password form](image)

Enter old password, new password, confirm password and click submit.

![Success](image)

Change Secret Question and Answer

Navigate to Change Secret Question(s) and Answer(s).

![Change Secret Question(s) and Answer(s) form](image)

Change Primary secret question, answer and Secondary secret question and answer. Click submit.

![Success](image)

Register Digital Signature Certificate

Navigate to Profile settings -> Register digital signature certificate

![Digital Signature Certificate](image)
Click submit. Success message will be displayed on the screen.

**Success**

- Your Digital Signature Certificate is successfully updated and the Transaction ID is: 1000077623. In case of any queries, please contact 1800 4250 0025.

**Opt for Higher Security**

Navigate to Profile settings->Opt for higher security

**Opt for Higher security**

Select the type of Digital certificate
- Sign with .pfx file
- Sign with your USB token

Enable Cancel

Not:
1. This feature is provided for a secured login.
3. Check whether your Digital Signature Certificate (DSC) is valid and not expired.
4. DSC should be registered in the e-Filing application.
5. Please check whether you have updated contact details/Principal contact details

Upload and match the DSC. Higher security option will be enabled.

Success message will be displayed on the screen.

**Success**

- Higher security has been enabled successfully and the Transaction ID is: 1000077624. In case of any queries, please contact 1800 4250 0025. You will be required to attach the Digital Signature Certificate for every Login.

Click Disable.

**Opt for Higher security**

You have already enabled higher security

Enable Cancel

Success message will be display on the screen
Success

- Higher security has been disabled successfully and the Transaction ID is: 1000077625. In case of any queries, please contact 1800 4250 0025.

My Account

View Form 26 AS (Tax Credit)

Navigate to My Account -> View Form 26 AS

Click Confirm. The user will be redirected to the NSDL page.

My Return/Form

Navigate to My Account - My returns/Form
User will be able to see the status of returns.

Click on the Acknowledgment number. The Details of the acknowledgment number is displayed as a pop up.

Note: ITR/Form and ITR-V/Acknowledgment are password protected. To open the PDF, please enter your PAN in lower case and date of birth in case of individual tax payers / date of incorporation for non-individual tax payers in DMMYYYY format without any space between the PAN and date fields. For example, if your PAN is ABCDE1234A and date of birth / incorporation is November 17, 1985 then the password will be abcde1234a17111985. The date of birth / incorporation should be same as furnished in the respective ITR / FORM.
Refund/Demand Status

Navigate to Refund/Demand Status

User is able to see the status of Refund/Demand.

<table>
<thead>
<tr>
<th>Assessment Year</th>
<th>Status</th>
<th>Reason</th>
<th>Payment Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-13</td>
<td>Not Determined</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>2013-14</td>
<td>Not Determined</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

Note: Reason will be displayed only for “Refund Unpaid” cases.

Refund Reissue Request

Navigate to Refund Reissue Request

Enter the CPC Reference Number, sequence number, DOB, captcha and click submit

Select Mode of Refund Reissue, bank account details, category

Click submit
Rectification Request

Navigate to Rectification request page

Select assessment year, enter communication reference number, and click submit

Select the Rectification request type and click submit

Rectification Status

Navigate to My Account -> Rectification Status
Select Assessment Year, enter Captcha and Click Submit.
User is able to see the status of rectification.

**Rectification Status**

- **PAN**: AAAPA2003W
- **Assessment Year**: Select

Click submit.

**Request for Intimation**

Select assessment year, category, sub-category, captcha and click submit.

**Request for Intimation**

- **PAN**: AAAPA2003W
- **Assessment Year**: Select
- **Category**: Select
- **Sub-category**: Select sub-category

Click submit.

**Request for Intimation**

Your request for intimation has been registered with us and Transaction ID is: 10030076531 In case of any queries please contact 1800 4250 2025.

The request would be further processed.
**Add CA**

Navigate to My Account -> Add CA
Enter the Membership no, select the form name and assessment year, and enter captcha.

![Add CA form](image)

Clicks submit. Success message should be displayed on the screen.

**Success**

HUF will be able to “Add CA” for the following set of Forms –

<table>
<thead>
<tr>
<th>Form</th>
<th>Form</th>
<th>Form</th>
<th>Form</th>
<th>Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>3AC</td>
<td>3CEA</td>
<td>6B</td>
<td>10CCBA</td>
<td>49F</td>
</tr>
<tr>
<td>3AD</td>
<td>3CA-3CD</td>
<td>10B</td>
<td>10CCBC</td>
<td>56F</td>
</tr>
<tr>
<td>3AE</td>
<td>3CB-3CD</td>
<td>10BB</td>
<td>10CCBD</td>
<td></td>
</tr>
<tr>
<td>3CE</td>
<td>3CEB</td>
<td>10CCB</td>
<td>10CCC</td>
<td></td>
</tr>
</tbody>
</table>

Once the assessee has added CA, CA will be able to upload the Forms on behalf of the assessee. Assessee can add one or more CAs for the same Form.

**List of CAs**

Navigate to Services -> List of CAs
List of CAs should be displayed.
Disengage ERI

Navigate to My Accounts -> Disengage ERI

Click Disengage button. ERI will be disengaged.

Tax Credit Mismatch

Navigate to My Account -> Tax Credit Mismatch

Select Assessment Year and Click Submit.
User is able to see the status of tax credit mismatch.

View Form 15CA

Navigate to My Account -> View Form 15CA to view the form 15CA upload by the assessee.

e-File

Upload Return

Navigate to e-file -> Upload Return
Select the ITR form name, Assessment year and select the Xml.

Click submit. Success message will be displayed on the screen.
Click the hyperlink. User should be able to see the ITR-V Acknowledgement.

Prepare and Submit ITR Online

Login and Navigate to efile -> Prepare and Submit ITR Online
ITR 4S is available Online.

For ITR 4S, enter the details in the Personal Information tab, Income Details tab, 44AE tab, TDS tab, Tax paid and Verification tab and 80G Tab.
Click Submit.

**e-File in Response to Notice 139(9)**

Navigate to e-file --> e-file in response to Notice u/s 139(9)

Select the ITR Form name, assessment year, enter Acknowledgment Number and Click Submit.

If the PAN is present in the list of these 1.46 Lakh cases where the Assessing Officer of certain jurisdictions has issued Demand Notice to assesses of their ward. In such cases upload the XML and submit the request.

If the PAN is not present in the list of these 1.46 Lakh cases than, enter communication reference number, CPC date, Receipt date, verification Pin and browse the file to attach the XML.
Click Submit.

Success message will be displayed on the screen.

Change ITR Form Particulars

Navigate to e-file --> Change ITR Form Particulars
Enter Acknowledgment Number and Click Submit.

User can change Bank Account Details, change Address Details, Email-ID, Mobile Number and Change filing with DSC within 7 days of filing the ITR Return.

Success message is displayed as shown
Prepare and Submit Online Form (Other than ITR)

Navigate to e-file --> Submit Form Online

Select the form name, assessment year and click “Submit”. Assessee will be able to fill the form and Submit the form for further processing.

For a HUF, following are the Forms available –

<table>
<thead>
<tr>
<th>Form 8</th>
<th>Form 10G</th>
<th>Form 52A</th>
<th>Form 56FF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 9</td>
<td>Form 35</td>
<td>Form 56</td>
<td></td>
</tr>
<tr>
<td>Form 10</td>
<td>Form 40C</td>
<td>Form 56D</td>
<td></td>
</tr>
<tr>
<td>Form 10A</td>
<td>Form 41</td>
<td>Form 49C</td>
<td></td>
</tr>
</tbody>
</table>

Response to Outstanding Tax Demand

Navigate to e-File -> Response to Outstanding Tax Demand

PAN is auto filled. Click on Submit.

The outstanding tax demand is displayed. User can submit the response and view the same.
For more details refer to the manual “Response to Outstanding Tax Demand” under Help section

**Compliance**

**Compliance Module**

Navigate to Compliance -> Compliance module

The user should provide details for the following:

A. Filing of Income Tax Return – User has to enter the Response, Reason, Mode, Date, Acknowledgement number and Circle/Ward and City.

B. Related Information Summary – User has to enter Information Type and Related PAN details
Click in Submit. A success message is displayed as shown below

View My Submission

Navigate to Compliance -> View my Submission in order to view the status of the compliance form submitted will be available.

Download

Income Tax Returns

Navigate to Downloads->Income Tax returns
Select the assessment year from the dropdown and click on download button.
Form BB (Return of Net Wealth)

Navigate to Downloads-> Form BB (Return of Net Wealth)
Select the assessment year from the dropdown and click on download button.

Forms (Other than ITR)

Navigate to Downloads-> Forms (Other than ITR)
Select the assessment year from the dropdown and click on download button.
Download Pre-filled XML

Navigate to Downloads -> Download Prefill Xml

Select the assessment year and click submit. User will be able to view the prefilled xml.

My Request List

Navigate to My Request List -> My Request List.

Select an option and click submit

Based on the option chosen – > Request List is displayed.

"My Intimation Request List" is displayed as shown
Forms Requested List is as displayed

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>CA User ID</th>
<th>Form Name</th>
<th>Assessment Year</th>
<th>Filed Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000138241</td>
<td>ARCA111111</td>
<td>Form 62</td>
<td>2013-14</td>
<td>23/09/2013</td>
<td>Uploaded - Pending Approval</td>
</tr>
<tr>
<td>1000138107</td>
<td>ARCA111111</td>
<td>Form 63A</td>
<td>2013-14</td>
<td>23/09/2013</td>
<td>Successfully e-Filed</td>
</tr>
<tr>
<td>1000138103</td>
<td>ARCA111111</td>
<td>Form 64</td>
<td>2013-14</td>
<td>23/09/2013</td>
<td>Successfully e-Filed</td>
</tr>
</tbody>
</table>

Refund Reissue Request List is as displayed

<table>
<thead>
<tr>
<th>S.No</th>
<th>Transaction ID</th>
<th>Assessment Year</th>
<th>Status</th>
<th>Submitted On</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000137913</td>
<td>2013</td>
<td>Pending</td>
<td>23/09/2013</td>
</tr>
</tbody>
</table>

Change ITR Form Particulars list is as displayed

<table>
<thead>
<tr>
<th>S.No</th>
<th>Transaction ID</th>
<th>PAN</th>
<th>Acknowledgment Number</th>
<th>Submitted On</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000137913</td>
<td>AAACB1983G</td>
<td>567389161239913</td>
<td>23/09/2013</td>
</tr>
</tbody>
</table>

Worklist

For Your Action
Navigate to For Your Action. This functionality provides information on the pending actions at user’s end. For below mentioned services pending action shall be displayed in this menu:
- Details of defective returns
- ITR-V not received / rejected
- Details of Outstanding demand
- View Uploaded Form Details
- Compliance
- Refund Unpaid/Failed
Click on any of the above links, User will be taken to particular pending action to complete the activity.

For Your Information
Navigate to For Your Information. Assessee will be able to view the approved/rejected forms submitted by CA on behalf him/her.

For Your Information

<table>
<thead>
<tr>
<th>Sl.No</th>
<th>CA Name</th>
<th>Form Name</th>
<th>A.Y.</th>
<th>Submitted On</th>
<th>Approval Status</th>
<th>View Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SWAMY</td>
<td>AAA RAM</td>
<td>2014-15</td>
<td>04/11/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
<tr>
<td>2</td>
<td>SWAMY</td>
<td>AAA RAM</td>
<td>2014-15</td>
<td>28/10/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
<tr>
<td>3</td>
<td>SWAMY</td>
<td>AAA RAM</td>
<td>2014-15</td>
<td>13/10/2014</td>
<td>Successfully e-Filed</td>
<td>View Form</td>
</tr>
</tbody>
</table>
Click on “View Form”.

**Helpdesk**

**Submit Request**

GO to Help Desk - Click Submit Grievance

User selects Grievance Related to CPC or e-Filing.

Enters the required details and Clicks submit. Success message is display on the screen.

**Grievance Status**

Navigate to Help Desk - Click Grievance Status.

User will be able to see the status of the submitted grievance.
Tax Professional (CA)
Tax Professional (CA) Registration

Before a CA registers in the new e-Filing application, the following conditions should be met.

A CA should

1. Be a practising CA [should be registered with Institute of Chartered Accountants of India (ICAI) with a valid Membership Number].
2. Have a valid PAN and a Digital Signature Certificate

Registration Process

- Type in the URL of e-Filing application in a browser (https://incometaxindiaefiling.gov.in/)

- Click on the ‘Register Yourself’ tab and select ‘Chartered Accountant’ against the radio button found under “Tax Professional”.
The user will be directed to the registration page and the user will fill the following fields for further validation.

- **Membership Number** – Mandatory, numeric, limited to 6 digits
- **Date of Enrolment** – Mandatory, select the date from the calendar provided
- **CA’s Surname** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
- **CA’s First Name** – Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- **CA’s Middle Name** - Not mandatory, alphanumeric and can contain special characters, limited to 25 characters
- **CA’s PAN** - Mandatory, 10 character alphanumeric
- **Date of Birth** – Mandatory, select the date from the calendar provided, and should match the date as given in the PAN card
- **Email ID** - Mandatory, alphanumeric, limited to 125 characters and should be a valid format
- **Digital Signature Certificate** – Mandatory and the user uploads the DSC
User clicks ‘CONTINUE’ and the PAN detail is validated and the CA credentials are validated with the ICAI database available with e-Filing application.

On success, the user is directed to the Registration details page and the user needs to enter the following details.

### A. Password Details

- **User ID** – This will be generated by the system (Eg: ARCA012345) and will be sent to the user in an email with an activation link.
- **Password** – Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **Confirm Password** – The user has to enter the same password as entered above. This is mandatory.
- **Primary Secret Question** – The user needs to select any one question out of four available in the drop down. This is mandatory.
- **Primary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters
- **Secondary Secret Question** – The user needs to select any one question out of the balance three available in the drop down. This is mandatory.
- **Secondary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters

### B. Contact Details

- **Landline Number** – Non-mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).
- **Mobile Number** - Mandatory, numeric field, 10 digits.
- **Alternate Mobile Number** - Non-mandatory, numeric field, 10 digits
- **Email ID** - This field is auto-filled from the previous page
- **Alternate Email ID** - Non-mandatory, alphanumeric, 125 characters
- **Fax Number** - Non-mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).
Postal Address

- **Flat/Door/Building** – Mandatory, alphanumeric and special characters, limited to 50 characters
- **Road/Street** - Non-mandatory, alphanumeric and special characters, limited to 50 characters
- **Area/Locality** - Mandatory, alphanumeric and special characters, limited to 50 characters
- **Town/City/District** - Mandatory, alphanumeric and special characters, limited to 50 characters
- **State** – Mandatory, user selects from the drop down provided
- **Pin code** - Mandatory, numeric, limited to 6 digits

C. CAPTCHA

- This is mandatory and the user has to type in the numeric code which appears on the screen

D. Subscribe to Mailing List

- This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list

E. Enable Alerts, reminder and notifications

- This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.
### Registration Form - Authorized Representatives Registration

#### Step 1: Enter Basic Details

<table>
<thead>
<tr>
<th><strong>User ID</strong></th>
<th>To be e-mailed to you after successful submission of form.</th>
</tr>
</thead>
</table>

#### Password Details

<table>
<thead>
<tr>
<th><strong>Password</strong></th>
<th>Zero Length</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Confirm Password</strong></td>
<td></td>
</tr>
</tbody>
</table>

| **Primary Secret Question** | Select |
| **Primary Secret Answer** |                                                 |

| **Secondary Secret Question** | Select |
| **Secondary Secret Answer** |                                                 |

#### Contact Details

| **Landline Number** | +91  |
| **Mobile Number** | +91   |
| **Alternate Number** | +91   |
| **E-mail Id** | helpdesk@ics.ca.tcs.co |

| **Alternate E-mail Id(Optional)** |                                                 |
| **Fax Number** | -91   |

#### Postal Address

| **Flat/Door/Building** |                                                 |
| **Road/Street** |                                                 |
| **Area/ Locality** |                                                 |
| **Town/City/District** |                                                 |
| **Pincode** |                                                 |

| **State** | Select |
| **Country** | India |

#### Subscribe to E-mail and Alerts

- [ ] Enable Alerts
- [ ] Subscribe to Mailing List

| **Image** | ![Image](image.png) |
| **Enter the numbers as appearing in the above Image** |                                                 |

| **Submit** |                                                 |
User clicks 'SUBMIT' and the fields are validated for correctness. The user records are captured in the e-Filing application. If not, the user will be intimated on unsuccessful registration.

The user receives a confirmation e-mail with an activation link to the registered Email ID. An SMS along with OTP (One time Password) is also sent to the registered Mobile number.

In order to activate the account, the user should click on the Activation link and enter the Mobile PIN. On success, the user account is activated and the database is updated.
Tax Professional (CA) Features

Pre-requisites:

- CA should have a valid membership number.
- CA should be registered in e-Filing application.

Login

Type the URL of e-Filing application (https://incometaxindiaefiling.gov.in) in a web browser (Internet Explorer/ Mozilla/ Chrome/ Safari).

Click on the “Login Here” button available on the home page. Enter the login credentials i.e., User Id and Password as provided in the e-mail and click “Login” button.

Click Login.
Forgot Password

CA User can click on the “Forgot Password?” link available next to “Login” button to reset the password. CA User has to enter following details –

- **User ID of the CA User**: Mandatory, alphanumeric.
- **Captcha**: This is mandatory and the user has to type in the numeric code which appears on the screen.

On clicking “Continue” button, CA User will be directed to a new page where he can ‘Upload Digital Signature Certificate’ option to reset the Password.

CA User has to upload his Digital Signature Certificate and Click on Validate.

User is directed to a new page where the “New Password” has to be entered and user has to “Confirm Password”. Click on “Submit” button.

A success message is displayed with Transaction ID.
Post-login, CA will be provided with Quick links on left, instructions on right and a dashboard with all the activities exercised by CA in the middle. CA user name and last login time is displayed on top right corner. A menu bar is provided on top with following categories and sub-categories:

- **My Account**
  - e-Filed Returns/Forms
  - View Client List

- **E-File**
  1. Upload Form
  2. Prepare and Submit Online Form (Other than ITR)

- **Downloads**
  - Forms (Other than ITR)

- **Profile Settings**
  1. My Profile
  2. Change Password
  3. Change Secret Question(s) / Answer(s)
  4. Register DSC
  5. Opt for Higher Security

- **My Request List**
  - My Request List

- **Worklist**
  - Worklist

- **Helpdesk**
  1. Submit Request
  2. Request List
Functionalities available for CA in e-Filing application:

**eFiled Returns/Forms**

Go to My Account and select eFiled Returns/Forms. User should enter the following details.

- **PAN of the Assessee**: Mandatory, 10 character alphanumeric.

  *Note*: User must have added CA under ‘Add My CA’.

User clicks ‘SUBMIT’ and the fields are validated for correctness. A new page is displayed with all the return details of the client.

**View Returns/Forms**

View Returns/Forms displays the list of returns of the CA. Search can be done based on PAN, Form Name, Assessment Year and Status.

**View Client List**

View Client List displays the list of clients of the CA. Search can be done based on PAN, Form Name, Assessment Year and Status.

**Upload Form**

Go to e-File and select Upload Form. User should enter the following details.

- **PAN of the Assessee**: Mandatory, 10 character alphanumeric.

  *Note*: User must have added CA under ‘Add My CA’.

- **PAN of the CA**: Mandatory, 10 character alphanumeric.

- **Form Name**: Mandatory, dropdown

- **Assessment Year**: Mandatory, dropdown

- **Filing Type**: Form can be filed either as Original or Revised.
- **Upload XML**: Mandatory, form in XML format
- **Select the Digital Signature Certificate** – Mandatory and the user uploads the DSC.

If user selects form ‘3CA’ or ‘3CB’, he has to upload additional attachments like,

- **Balance Sheet**: Mandatory
- **Profit Loss Statement**: Mandatory
- **Cost Audit Report**: Non-mandatory
- **Excise Audit and/or Other Report**: Non-mandatory

The attachment size should not exceed more than 50Mb and the format should be .pdf or .zip.

CA can also file the Forms on behalf of the Deceased Assessee.

User clicks ‘SUBMIT’ and the fields are validated for correctness. A success message is displayed on successful upload of Forms.

---

**Prepare and Submit Online Form (Other than ITR)**

Go to e-File and select Submit Form Online. User should enter the following details.

- **PAN of the Assessee**: Mandatory, 10 character alphanumeric.
  
  *Note*: User must have added CA under ‘Add My CA’.

- **PAN of the CA**: Mandatory, 10 character alphanumeric.

- **Form Name**: Mandatory, dropdown
- **Assessment Year**: Mandatory, dropdown
- **Select the Digital Signature Certificate**: Mandatory and the user uploads the DSC

User clicks 'SUBMIT' and the online form will be opened based on the form selected. A success message is displayed on successful upload of form. Assessee has to verify the forms in his/her login and approve/reject the form which is available under Worklist.

CA can also file the Forms on behalf of the Deceased Assessee.

### Downloads

#### Income Tax Return Forms

Go to Downloads and select Download Forms. User should first select the assessment year and then click excel or the pdf to download it.

### Profile Settings

#### Change Password

Go to Profile Settings and select Change Password. User should enter the following details.
- **Old Password**: Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **New Password**: Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **Confirm Password** – The user has to enter the same password as entered above. This is mandatory.

![Password Change Form](image)

User clicks ‘SUBMIT’ and a success message page is displayed confirming password change.

**Success**

- Your password has been updated successfully and the Transaction ID is: 1000077641. In case of any queries, please contact 1800 4250 0025.

---

**Change Secret Question(s) / Answer(s)**

Go to Profile Settings and select Change Secret Question(s) / Answer(s). User should enter the following details.

- **Primary Secret Question** – The user needs to select any one question out of four available in the drop down. This is mandatory.
- **Primary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters
- **Secondary Secret Question** – The user needs to select any one question out of the balance three available in the drop down. This is mandatory.
- **Secondary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters.

![Change Secret Question Form](image)

User clicks ‘SUBMIT’ and a success message page is displayed confirming change in secret question and secret answer.

**Success**

- Your secret question/answer(s) have been updated successfully and the Transaction ID is: 1000077642. In case of any queries, please contact 1800 4250 0025.

---

**Register Digital Signature Certificate**

Go to Profile Settings and select Register Digital Signature Certificate. User should select a valid DSC i.e., it should be a .pfx file. Instructions will be provided in the right corner of e-Filing application when Register Digital Signature Certificate page is opened.
User clicks “Submit” after selecting a DSC, a success message page is displayed.

**Success**

- Your Digital Signature Certificate is successfully updated and the Transaction ID is: 1000077623. In case of any queries, please contact 1800 4250 0025.

**Opt for Higher Security**

Go to Profile Settings and select Opt for Higher Security. Update and match the DSC to enable higher security. DSC is made mandatory for the user to login.

**Success**

- Higher security has been enabled successfully and the Transaction ID is: 1000077624. In case of any queries, please contact 1800 4250 0025. You will be required to attach the Digital Signature Certificate for every Login.

**My Profile**

In order to view or update ‘My Profile’, the user needs to perform the following steps

**Step 1:**
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

**Step 2:**
A screen with Address and Contact Details will be displayed.

**Step 3:**
In order to change the Principal Contact details Click on ‘Principal Contact’ tab and click on the ‘Edit’ button. In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.
Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

**Step 4:** In order to change the Contact details Click on ‘Contact Details’ tab and click on ‘Edit’ button.

The user can edit the details and click on the ‘Save’ button. Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.

Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows

**Worklist**

Go to Worklist and Worklist. All the forms submitted by clients of CA will be displayed in this worklist.
To View the form click on “View Form”, CA will be able to verify the form submitted by the client.

Helpdesk

Submit Request

Go to Helpdesk and select Submit Request. User has to enter the following details.

- **Mobile Number** - Mandatory, auto-filled, numeric field, 10 digits.
- **Email ID** - Mandatory, alphanumeric, 125 characters
- **Category** – Mandatory, dropdown
- **Sub-category** - Mandatory, dropdown, options available are based on selection of category dropdown
- **Summary** – Mandatory, minimum of 30 characters has to be entered.
- **Description** - Mandatory, minimum of 30 characters has to be entered.
- **Attachment** – Non-mandatory

User clicks on ‘SUBMIT’, a success message page is displayed.

Submit Request

Your request has been successfully registered and the Request Number is 97605. In case of any queries, please contact 1000 4250 0025.

An e-mail has been sent to aa@gmail.com.

We will revert on the resolution via e-mail. You can also view the solution/status of your request. GO TO Helpdesk -> ‘Request List’.
Request List

Go to Helpdesk and select Request List. User can search a request raised by using following options.

- **Status**: Mandatory, dropdown
- **Start Date**: Non-mandatory, a calendar is provided to select the date.
- **End Date**: Non-mandatory, a calendar is provided to select the date.

User enters the details and clicks on “Search” button. All the requests based on the filter will be displayed. User should click on the request number which he/she wants to view.

User can edit the details like Summary, description, etc. 3 buttons are available to the user.

- **Back**: Takes user to previous page.
- **Update**: Updates the request.
- **Cancel:** Request is cancelled.

### Request List

- The request number 447 is updated successfully.

| Request No | 
|---|---|
Bulk PAN Verification User (External Agency)
External Agency Registration (Bulk Pan Verification User)

For Registering in the e-Filing application, an External Agency must have

- A Valid PAN.
- For Non-Government Agency, DSC is mandatory.

Registration Process:

1. Type in the URL of e-Filing application (https://incometaxindiaefiling.gov.in).
2. Click on the 'Register Yourself' tab and select 'External Agency' against the radio button under the “Bulk PAN Verification Users”.

Note: Instructions are provided on the right hand side of the screen. However, user can also refer the HELP menu.
3. The user will be directed to the registration page.

A. Password Details

- **User ID** – This will be generated by the system (Eg: EXTA100100) and will be sent to the user by an email along with an activation link.
- **Password** – Mandatory field can be between 8 – 14 characters, alphanumeric and should contain at least one special character.
- **Confirm Password** – Mandatory field. The user has to enter the same password as entered in the ‘Password’ field above.
- **Primary Secret Question** – Mandatory field. The user needs to select any one question from the drop down list.
- **Primary Secret Answer** – Mandatory field.
- **Secondary Secret Question** – Mandatory field. The user needs to select any one question from the drop down list.
- **Secondary Secret Answer** – Mandatory field.

B. Organization Details

- **Select External type of agency** – Mandatory field.
- **Organization Name** – Mandatory field.
- **Date Of Incorporation** – Mandatory field and should be as per the PAN details.
- **PAN of the Organization** – Mandatory in case of Non-Government Organisation.
- **TAN of the Organization** – Mandatory in case of Non-Government Organisation.

C. Personal Details of Principal Contact

- **PAN** – A Valid PAN required. Mandatory field.
- **Designation** – Mandatory field.
- **Surname** – Mandatory field and should be as per the PAN details.
- **First Name** – Not a mandatory field and should be as per the PAN details.
- **Middle Name** - Not a mandatory field and should be as per the PAN details.
- **Date of Birth** – Mandatory field and should be as per the PAN details.

D. Contact Details

- **Landline Number** – Not a mandatory field.
- **Mobile Number** – Mandatory field.
- **Alternate Mobile Number** – Not a mandatory field.
- **Email ID** – An auto-filled field.
- **Alternate Email ID** – Not a mandatory.
- **Fax Number** – Not a mandatory field.

E. External Agency's Office Postal Address

- **Flat/Door/Building** – Mandatory field.
- **Road/Street** – Not a mandatory field.
- **Area/Locality** – Mandatory field.
- **Town/City/District** – Mandatory field.
- **State** – Mandatory field.
- **Pin code** – Mandatory field.
- **Country** – Mandatory field.

F. Digital Signature Certificate (DSC)

- If it is **Government Agency** then DSC is not mandatory.
- If it is **Non-Government Agency** then DSC is a mandatory field.
G. Subscribe to Mailing List
This will be auto-selected. In case the User wishes not to subscribe to the same, then he can uncheck the box provided.

H. Enable Alerts, reminder and notifications
This will be auto-selected. In case the User wishes not to receive alerts related to the same, then he can uncheck the box provided.

Captcha Code
This is a mandatory field where the user needs to type the code which appears on the screen.
User clicks on the ‘SUBMIT’ button.

After registration, the user details along with the registration request are transferred to the e-Filing Admin. User has to send the Authorized Letter issued by the Head of the External Agency and a print out of attachment sent via email duly signed to e-Filing Admin at the address – Income Tax Department, Centralized Processing Centre, Post Bag 12, Electronic City Post Office, Bangalore – 100. The e-Filing Admin reviews the documents and approves the request.

The user receives a confirmation e-mail with an activation link to the registered Email ID. An SMS along with OTP (One time Password) is also sent to the registered Mobile number. In order to activate the account, the user should click on the Activation link and enter the Mobile PIN. On success, the user account is activated and the database is updated.
External Agency Features (Bulk Pan Verification User)

Pre-requisites:

External Agency user should be registered in e-Filing application.

Login:

Enter the URL of e-Filing application in a web browser (https:// incometaxindiae-Filing.gov.in/)

- Click on the “Login Here” button available on the home page. Enter the login credentials i.e., User Id and Password as provided in the e-mail and click “Login” button.
Forgot Password

CA User can click on the “Forgot Password?” link available next to “Login” button to reset the password. CA User has to enter following details –

- **User ID**: Mandatory, alphanumeric.
- **Captcha**: This is mandatory and the user has to type in the numeric code which appears on the screen.

![Captcha Image](image)

On clicking “Continue” button, External Agency user will be directed to a new page where he can select one of the options ‘Answer Secret Question’ or ‘Upload Digital Signature Certificate’ provided as radio buttons.

![Radio Buttons Image](image)

On Selecting ‘Answer Secret Question’, External Agency user has to enter his Date of Birth, Secret Question and Secret Answer.

![Submit and Cancel Buttons Image](image)

On Selecting ‘Upload Digital Signature Certificate’, External Agency user has to upload his Digital Signature Certificate.
After selecting either of the above options, External Agency user should click on “Submit” button.

User is directed to a new page where the “New Password” has to be entered and user has to “Confirm Password”.

External Agency user has to click on “Submit” to view the success page displayed on confirming the password reset.

Post-login, External Agency user will be provided with Quick links on left, instructions on right and a dashboard with all the activities exercised by External Agency users in the middle. External Agency user name and last login time is displayed on top right corner.

A menu bar is provided on top with following categories and sub-categories:

- **My Account**
  1. Token List

- **Bulk PAN Query**
  1. Token Details
  2. Upload Query

- **Profile Settings**
  1. Change Password
  2. Change Secret Question(s) / Answer(s)
  3. Register Digital Signature Certificate
  4. Opt for Higher Security
  5. My Profile

- **Helpdesk**
  1. Submit Request
  2. Request List
Token List

Go to My Account and select Token List.

Token List for the user is displayed with the details like Token number, Date of Submission, Status and Transaction Type.

List of Token Numbers

<table>
<thead>
<tr>
<th>Token Number</th>
<th>Date of Submission</th>
<th>Status</th>
<th>Transaction Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>100001399</td>
<td>02/11/2012</td>
<td>Processed</td>
<td>Bulk PAN Query</td>
</tr>
<tr>
<td>100001383</td>
<td>02/11/2012</td>
<td>Processed</td>
<td>Bulk PAN Query</td>
</tr>
<tr>
<td>100001382</td>
<td>01/11/2012</td>
<td>Processed</td>
<td>Bulk PAN Query</td>
</tr>
<tr>
<td>100001381</td>
<td>01/11/2012</td>
<td>Processed</td>
<td>Bulk PAN Query</td>
</tr>
<tr>
<td>100001054</td>
<td>24/09/2012</td>
<td>Processed</td>
<td>Bulk PAN Query</td>
</tr>
</tbody>
</table>

Token Details

Go to Bulk PAN Query and select Token Details. User should enter the following details.

**Token Number:** Mandatory, a 9-digit numeric value.

**Captcha:** This is mandatory and the user has to type in the numeric code which appears on the screen.

User clicks ‘SUBMIT’ and the fields are validated for correctness. A new page is displayed with Bulk PAN token details.
Upload Query

Go to Bulk PAN Query and select Upload Query. User should enter the following details.

**Upload XML**: Mandatory, XML file with a valid Bulk PAN format.

Bulk XML Format is as given below-

```xml
<?xml version="1.0" encoding="UTF-8"?>
<ns1:getPANInfo xmlns:ns1="http://bulkpanws.tcs.com/">
  <pan>DLBPS2852B</pan>
  <pan>AAAPA2003W</pan>
  <pan>AAAHA1000W</pan>
  <pan>AAAPA2006W</pan>
  <pan>CCGPK6727G</pan>
</ns1:getPANInfo>
```

User clicks 'SUBMIT' and the fields are validated for correctness. A success message is displayed when the details are valid.

Profile Settings

Change Password

Go to Profile Settings and select Change Password. User should enter the following details.

- **Old Password** – Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **New Password** – Mandatory, can be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.
- **Confirm Password** – The user has to enter the same password as entered above. This is mandatory.
- **Captcha** - This is mandatory and the user has to type in the numeric code which appears on the screen.

### Change Password

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Password</td>
<td>Enter the old password</td>
</tr>
<tr>
<td>New Password</td>
<td>Enter the new password</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Enter the new password again to confirm</td>
</tr>
<tr>
<td>Captcha Code Image</td>
<td>View and type in the numeric code</td>
</tr>
<tr>
<td>Captcha Code Image</td>
<td>View and type in the numeric code</td>
</tr>
</tbody>
</table>

User clicks ‘SUBMIT’ and a success message page is displayed confirming password change.

### Success

- Your password has been updated successfully and the Transaction ID is: 100077641. In case of any queries, please contact 1800 4250 0025.

### Change Secret Question(s) / Answer(s)

Go to Profile Settings and select Change Secret Question(s) / Answer(s). User should enter the following details:

- **Primary Secret Question** – The user needs to select any one question out of four available in the drop down. This is mandatory.
- **Primary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters.
- **Secondary Secret Question** – The user needs to select any one question out of the balance three available in the drop down. This is mandatory.
- **Secondary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters.
- **Captcha** - This is mandatory and the user has to type in the numeric code which appears on the screen.
**Change Secret Question(s) / Answer(s)**

User clicks ‘SUBMIT’ and a success message page is displayed confirming change in secret question and secret answer.

![Success](image)

- Your secret question/answer(s) have been updated successfully and the Transaction ID is: 1000077642. In case of any queries, please contact 1800 4250 0025.

**Register Digital Signature Certificate**

Go to Profile Settings and select Register Digital Signature Certificate. User should select a valid DSC i.e., it should be a .pfx file. Instructions will be provided in the right corner of e-Filing application when Register Digital Signature Certificate page is opened.

![Register Digital Signature Certificate](image)

User clicks “Submit” after selecting a DSC, a success message page is displayed.

![Success](image)

- Your Digital Signature Certificate is successfully updated and the Transaction ID is: 1000077623. In case of any queries, please contact 1800 4250 0025.

**Opt for Higher Security**

Go to Profile Settings and select Opt for Higher Security.
User can disable opt for higher security option by choosing “Disable” Option.

Success

User clicks “Disable”, a success message page is displayed.

Success

My Profile

In order to view or update ‘My Profile’, the user needs to perform the following steps

Step 1:
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

Step 2:
A screen with Principal Contact details, Address and Contact Details will be displayed.
Step 3:
In order to change the Principal Contact details Click on ‘Principal Contact’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

Step 4:
In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.
Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

**Step 5:** In order to change the Contact details Click on ‘Contact Details’ tab and click on ‘Edit’ button.

The user can edit the details and click on the ‘Save’ button. Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.
Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows.

**Helpdesk**

**Submit Request**

Go to Helpdesk and select Submit Request. User has to enter the following details.

- **Mobile Number** - Mandatory, auto-filled, numeric field, 10 digits.
- **Email ID** - Mandatory, alphanumeric, 125 characters
- **Category** – Mandatory, dropdown
- **Sub-category** - Mandatory, dropdown, options available are based on selection of category dropdown
- **Summary** – Mandatory, minimum of 30 characters has to be entered.
- **Description** - Mandatory, minimum of 30 characters has to be entered.
- **Attachment** – Non-mandatory

User clicks on ‘SUBMIT’, a success message page is displayed.
Request List

Go to Helpdesk and select Request List. User can search a request raised by using following options.

- **Status**: Mandatory, dropdown
- **Start Date**: Non- mandatory, a calendar is provided to select the date.
- **End Date**: Non- mandatory, a calendar is provided to select the date.

User enters the details and clicks on “Search” button. All the requests based on the filter will be displayed. User should click on the request number which he/she wants to view.
User can edit the details like Summary, description, etc. 3 buttons are available to the user.

- Back: Takes user to previous page.
- Update: Updates the request.
- Cancel: Request is cancelled.
TAX DEDUCTOR AND COLLECTOR
Tax Deductor and Collector User Registration

Pre-requisites for registering in the e-Filing application.

- Have a valid **TAN** and a Digital Signature Certificate (DSC)

**REGISTRATION PROCESS**

Type in the URL ([https://incometaxindiaefiling.gov.in](https://incometaxindiaefiling.gov.in)) of e-Filing application in browser.

1. Click on the 'Register Yourself' tab and select 'Tax Deductor and Collector' -> Continue

   ![Registration Form]

   **Note**: Instructions are provided on the right hand side of the screen. However, user can also refer to HELP menu.

2. The user will be directed to the registration page and the user will fill the following fields for further validation.

   - **TAN** - Mandatory, 10 character alphanumeric
   - **Organization Name** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters
3. User clicks ‘CONTINUE’ and the TAN details are validated with the e-Filing application database

4. On success, the user is directed to the Registration page.
A. Password Details

- **User ID** – This will be automatically populated and non-editable.

- **Password** (Mandatory) - Should be between 8 – 14 characters, alphanumeric and should contain at least one special character and one numeric.

- **Confirm Password** – The user has to enter the same password as entered above. This is mandatory.

- **Primary Secret Question** – The user needs to select any one question out of four available in the drop down. This is mandatory.

- **Primary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters

- **Secondary Secret Question** – The user needs to select any one question out of the balance three available in the drop down. This is mandatory.

- **Secondary Secret Answer** – Mandatory, alphanumeric and special characters, limited to 25 characters
B. Personal Details of Principal Contact

- **PAN** - Mandatory, 10 characters alphanumeric.
- **Designation** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters.
- **Surname** – Mandatory, alphanumeric and can contain special characters, limited to 75 characters.
- **First Name** – Not mandatory, alphanumeric and can contain special characters, limited to 25 characters.
- **Middle Name** - Not mandatory, alphanumeric and can contain special characters, limited to 25 characters.
- **Date of Birth** – Mandatory, select the date from the calendar provided, and should match the date as given in the PAN card.
- **Mobile Number** - Mandatory, numeric field, 10 digits.
- **Alternate Mobile Number** - Non mandatory, numeric field, 10 digits
- **Email ID** - Mandatory, alphanumeric, 125 characters
- **Alternate Email ID** - Non mandatory, alphanumeric, 125 characters

C. Organisation Details

- **Organisation name** – auto filled and non-editable.
- **Date of Incorporation** - auto filled from Database and non-editable.
- **Is PAN of the Organization available?** - Mandatory, a drop down.
- **PAN of the Organization** - Mandatory, 10 characters alphanumeric.
- **Organization Name( As in PAN)** - Mandatory, up to 75 characters.
- **Reasons if PAN not Available** - Mandatory, a drop down.
- **Landline Number** - Mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).
- **Fax Number** - Mandatory, numeric field, 10 digits (STD code and the telephone number should not exceed 10 digits. Do not prefix ‘0’).

D. Corporate office of Postal Address

- **Flat/Door/Building** – Mandatory, alphanumeric and special characters, limited to 50 characters.
- **Road/Street** - Non-mandatory, alphanumeric and special characters, limited to 50 characters.
- **Area/Locality** - Mandatory, alphanumeric and special characters, limited to 50 characters.
- **Town/City/District** - Mandatory, alphanumeric and special characters, limited to 50 characters.
- **State** – Mandatory, user selects from the drop down provided.
- **Pin code** - Mandatory, numeric, limited to 6 digits.

E. Digital Signature Certificate

- Mandatory

F. Subscribe to Mailing List
This will be auto-selected. User can un-check the box provided to un-subscribe for mailing list

**G. Enable Alerts, Reminders and Notifications**

This will be auto-selected. User can un-check the box provided to disable alerts, reminders and notification.

**H. Captcha Code**

- This is mandatory and the user has to type in the numeric code which appears on the screen.
- User clicks on 'SUBMIT'. A successful TAN registration message been displayed. The user records are captured in the e-Filing application.
- The user receives a confirmation e-mail with an **activation link to the registered Email ID**. An SMS along with OTP (One time Password) is also sent to the registered Mobile number.
- In order to activate the account, the user should click on the **Activation link and enter the Mobile PIN**. On success, the user account is activated and the database is updated.

*Registration Form - TDS Registration*

Step 1: Enter Basic Details  Step 2: Registration Form  Step 3: Registration Successful

Thank you for registering in e-Filing. Your Transaction ID is **1000268711**.

A link to activate your account has been emailed to eedfs@ffg.in and an OTP PIN has been sent to +91- 8888888888.

To activate your e-Filing account Please click on activation link and enter the OTP PIN received in your mobile number.

To Login to the e-Filing, you must activate your account. In case of any queries, please contact 1800-4250-0025.
Tax Deductor and Collector Features

Login

In browser, enter the URL of the e-Filing application (https://Incometaxindiaefiling.gov.in).

Click ‘Login Here’ button. Enter User ID and password

Click Login.

Profile Settings

My Profile

In order to view or update ‘My Profile’, the user needs to perform the following steps

Step 1:
Go to the ‘Profile settings’ and Click on the ‘My Profile’ link.

Step 2:
A screen with PAN/TAN Details, Principal Contact details, Address and Contact Details will be displayed.
Step 3:
In order to change the Principal Contact details Click on ‘Principal Contact’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.

Step 4:
In order to change the address details Click on ‘Address’ tab and click on the ‘Edit’ button.

Update the required fields and click on ‘Save’ button. A success message is displayed as shown.
Step 5: In order to change the Contact details Click on ‘Contact Details’ tab and click on ‘Edit’ button.

The user can edit the details and click on the ‘Save’ button. Once the Contact details are changed, the user must enter the Mobile PIN and the Email PIN which will be sent to the Mobile number and Email ID mentioned by the user respectively.

Enter the Mobile PIN and Email PIN. Click on confirm. A success message will be displayed as follows:

Change Password

In order to change the password, the user needs to perform the following steps

Step 1: Go to the ‘Profile settings’ and Click on the 'Change Password' link.
Step 2:
The User needs to enter the mandatory details (*) then Click on the ‘Submit’ button and the fields are validated for correctness.

Once the password is changed successfully, a ‘success’ message will be displayed on the Screen.

---

Change Secret Question(s) / Answer(s)

In order to change the secret question / answer, the user needs to perform the following steps:

Step 1:
Go to ‘Profile settings’ and Click on the ‘Change Secret question/Answer’ link.

Step 2:
User needs to enter all the mandatory fields like the Primary and Secondary questions and their respective answers.

The user also needs to provide the correct ‘Captcha Code’ and Click on the ‘Submit’ button.
The fields are validated for correctness and a Success Message is displayed on the Screen.

---

Register Digital Signature Certificate

In order to register the Digital Signature Certificate, the user needs to perform the following steps:

Step 1:
Go to ‘Profile Settings’ and Click on the ‘Register Digital Signature Certificate’ link.

Step 2:
The User needs to select either on the ‘Sign with .pfx file’ or the ‘Sign with your USB token’ against the radio button.
Click on the ‘Submit’ button.

**Step 3:**
A Success Message will be displayed on the Screen as shown below.

![Register Digital Signature Certificate](image)

**Opt for Higher Security**

In order to opt for Higher Security, the user needs to perform the following steps:

**Step 1:**
Go to ‘Profile Settings’ and Click on the 'Opt for Higher Security' link.
The User can either enable or disable the higher security as he/she wishes.

**Step 2:**
The User Clicks on the ‘Enable’ button. The respective Success Message will be displayed on the Screen.

![Opt for Higher Security](image)

Else, the User clicks on the ‘Disable’ button. The respective Success Message will be displayed on the Screen.

![Success](image)
e-File

Prepare and Submit Online Form (Other than ITR)

Navigate to e-file --> Prepare and Submit Form Online

Select the form name, assessment year, upload the DSC and click “Submit”. Assessee will be able to fill the form and Submit the form for further processing.

For a TAN user, only Form15CA is available.

My Account

View Form 15CA

Navigate to My Account -> View Form 15CA to view the form 15CA uploaded.

The user can view the details like Remitter PAN, Country to which remittance is made, Date of Filing, Ack. No etc. and also can download the PDF of the form filed.
Third Party Software Utility Developer Registration
Third Party Software Utility Developer Registration

A Third Party Utility Provider should have a valid PAN for registering with the e-Filing application.

- Type in the URL of e-Filing application (https://incometaxindiae filing.gov.in). Click on the 'Register Yourself' tab available on Homepage.

- Select 'Third Party Software Utility Developer' against the radio button. Click on “Continue” button.

Enter Registration Form

- **Category** – Mandatory, should be select from dropdown.
- **Software Product Name**-Mandatory, A textbox where product name should be entered.

If Category is **other than individual** then user should fill following details

**Organization Details**

- **Organization PAN** – Mandatory, should be valid PAN of 10 characters.
- **Name of Organization**– Mandatory.
- **Date of Incorporation**– Mandatory.
A. **Personal/Principal Contact Details**

- **PAN** – Mandatory, should be valid PAN of 10 characters.
- **Surname** – Mandatory, should be as per the PAN details.
- **Middle Name** – Not mandatory, should be as per the PAN details.
- **First Name** - Not mandatory, should be as per the PAN details.
- **Date of Birth** – Mandatory, should be as per the PAN details.

B. **Contact Details**

- **Landline Number** – Not mandatory.
- **Mobile Number** – Mandatory.
- **Secondary Mobile Number** - Non mandatory.
- **Email ID** – Mandatory, should be valid E-mail ID.
- **Secondary Email ID** - Non mandatory, should be valid E-mail ID.
- **Fax Number** – Non-mandatory.
c. Current Address

- **Flat/Door/Building** – Mandatory.
- **Road/Street** – Non-mandatory.
- **Area/Locality** – Mandatory.
- **Town/City/District** – Mandatory.
- **Pin code** – Mandatory.
- **State** – Mandatory, user selects from the drop down provided.

![Current Address Form](image)
D. **Assessment Year Return Details**

- **Assessment Year** – Mandatory.
- **Please select the forms For Approval** – Mandatory. Here multiple forms can be selected.
- **Attach scanned documents in ZIP format (Refer Notes)** – Mandatory.

![Assessment Year Return Details](image)
## Mandatory Documents to be uploaded at the time of registration:

<table>
<thead>
<tr>
<th>User Type</th>
<th>Type of Attested &amp; Scanned documents to be uploaded</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Individual</strong></td>
<td>• PAN card.</td>
</tr>
<tr>
<td></td>
<td>• Identity proof issued by Govt agencies.</td>
</tr>
<tr>
<td></td>
<td>• Address proof.</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>• PAN card of the Company.</td>
</tr>
<tr>
<td></td>
<td>• PAN of the principal contact.</td>
</tr>
<tr>
<td></td>
<td>• Identity proof of the principal contact issued by Govt agencies.</td>
</tr>
<tr>
<td></td>
<td>• CIN/ROC certificate</td>
</tr>
<tr>
<td><strong>Other than Company</strong></td>
<td>• PAN card of the Firm/BOI/AOP.</td>
</tr>
<tr>
<td></td>
<td>• PAN of the principal contact.</td>
</tr>
<tr>
<td></td>
<td>• PAN of one more partner other than principal contact.</td>
</tr>
<tr>
<td></td>
<td>• Identity proof of the principal contact issued by Govt agencies.</td>
</tr>
</tbody>
</table>

**Note:** Please upload only the zipped documents (Maximum 5 MB).

- **Captcha**

  This is mandatory and the user has to type in the numeric code which appears on the screen.
• Click on ‘SUBMIT’. If it is success, user will be navigated to the “Registration successful” screen.

• The request is sent to ITD Admin’s Work list for approval.

• Post ITD Admin approval, a confirmation email will be sent to the registered email id with the below details
  
  • Software Provider Id
  • Secret Key
  • Number of iterations
Register as Person Competent to Verify
Register as Person Competent to Verify

As per section 140 of Income Tax Act 1961, where the individual (Taxpayer) is mentally incapacitated from attending to his affairs, his guardian or any other person competent to act on his behalf can verify the return of income.

An Individual must register on behalf of a mentally incapacitated individual in e-Filing application in order to avail the services like filing of returns and other functionalities.

Steps involved in Register as Person Competent to Verify

**Step 1 - Login** to e-Filing portal using *Competent Person's Credentials*

**Step 2 - My Account** → Register as Person Competent to Verify

**Step 3 - Enter the details of Incompetent Person**
- PAN
- Date of Birth (DD/MM/YYYY)
- Surname
- Middle Name
- First Name

**Step 4 – Select the files to upload**
Step 5 – Attach a Zip/PDF File with the below scanned documents

- Copy of PAN card of the incapacitated
- Self-attested PAN card copy
- Certificate issued by District Committee headed by District Collector.

Step 6 - Click Submit

Approval Process

Step 1 – ‘Register as Person Competent to Verify’ request will be sent to the e-Filing Administrator.
Step 2 - The e-Filing Administrator will verify the request and approve / reject as applicable based on the documents uploaded.
Step 3 - An e-mail is sent to the registered e-mail ID with the details of approval / Rejection.

Person Competent to Verify – Services

<table>
<thead>
<tr>
<th>S.N</th>
<th>Services available on behalf of incompetent person</th>
<th>Competent Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Upload Return</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>Submit ITR online</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>Defective Returns</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>Submit Form online (self/LH)</td>
<td>Yes</td>
</tr>
<tr>
<td>5</td>
<td>My Returns/Forms</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>Rectification request/status</td>
<td>Yes</td>
</tr>
<tr>
<td>7</td>
<td>Refund Re-issue</td>
<td>Yes</td>
</tr>
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<td>8</td>
<td>Request for Intimation</td>
<td>Yes</td>
</tr>
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<td>9</td>
<td>Response to Outstanding Tax Demand</td>
<td>Yes</td>
</tr>
<tr>
<td>10</td>
<td>Tax Credit Mismatch</td>
<td>Yes</td>
</tr>
<tr>
<td>11</td>
<td>List / Dis-engage CA</td>
<td>Yes</td>
</tr>
<tr>
<td>12</td>
<td>Dis-engage CA</td>
<td>Yes</td>
</tr>
<tr>
<td>13</td>
<td>Dis-engage ERI</td>
<td>Yes</td>
</tr>
<tr>
<td>14</td>
<td>Helpdesk Request</td>
<td>Yes</td>
</tr>
<tr>
<td>15</td>
<td>Worklist</td>
<td>Yes</td>
</tr>
<tr>
<td>16</td>
<td>Compliance</td>
<td>Yes</td>
</tr>
<tr>
<td>17</td>
<td>View Form 26AS (Tax Credit)</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Register as Official Liquidator
Register as Official Liquidator

As per Sec 359(2) of the Companies Act 2013, liquidators appointed under sub-section (1) shall be whole-time officers of the Central Government.

For e-Filing of the return and other forms for companies in liquidation, the official liquidator further authorizes a person to act on his behalf.

Steps involved in Official Liquidator Registration

Step 1 - Login to e-Filing portal using Official Liquidator's Credentials
Step 2 - My Account → Register as Official Liquidator

<table>
<thead>
<tr>
<th>My Account</th>
<th>e-File</th>
<th>Compliance</th>
<th>e-File</th>
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<td>e-Filed Returns/Forms</td>
<td>Refund/Demand Status</td>
<td>Refund Re-issue Request</td>
<td>Rectification Request</td>
<td>Rectification Status</td>
<td>Request for resend of communication</td>
<td>Register as Legal Heir</td>
<td>Add CA</td>
<td>List/Dis-engage CA</td>
<td>Register as Person Competent to Verify</td>
</tr>
</tbody>
</table>

Step 3 - Enter Details of companies for which authorization has been received by the Official liquidator
  - PAN
  - Date of Birth (DD/MM/YYYY)
  - Organisation Name

Step 4 – Select the files to upload

Step 5 – Attach a Zip/PDF File with the below scanned documents
- Letter appointing as Official Liquidator
• Order of the competent authority giving list of companies under liquidation.

Step 6 - Click Submit

Approval Process

Step 1 – Official Liquidator Registration request will be sent to the e-Filing Administrator.

Step 2 – The e-Filing Administrator will verify the request and Approve / Reject as applicable based on the documents uploaded. Communication shall be shared to the registered email id.

Official Liquidator – Services

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