JOB AID

eBIRForms Package Installation Guide

A step-by-step procedure on how to install eBIRForms Offline Package

Version 1.1

Table of Contents

1. Introduction 3
2. System Requirements 3
3. Installation of the eBIRForms Package 3
4. Accessing the eBIRForms Package/Application 6
5. What to Do When Windows 11 – Blocking the installation of the new version of eBIRForms Offline Package 7
6. How to transfer data to the latest version of eBIRForms Offline Package 7
7. How to Properly Accomplish the eBIRForms 8
8. Validation, Saving, and Printing 10

1. Introduction

This User Guide provides step-by-step instructions on how to Download and Install the Electronic Bureau of Internal Revenue Forms (eBIRForms) Package

2. System Requirements

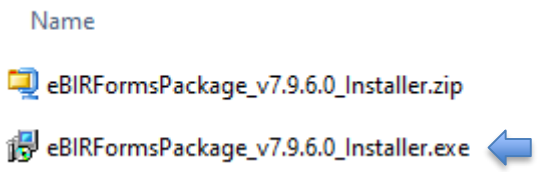
- Windows Operating System (Preferably Windows 10 or higher)
- At least 4 GB RAM
- At Least 500 MB free disk space
- PDF Reader (for print preview)

3. Installation of the eBIRForms Package

Step 1: Download the eBIRForms installation package from the official BIR website:

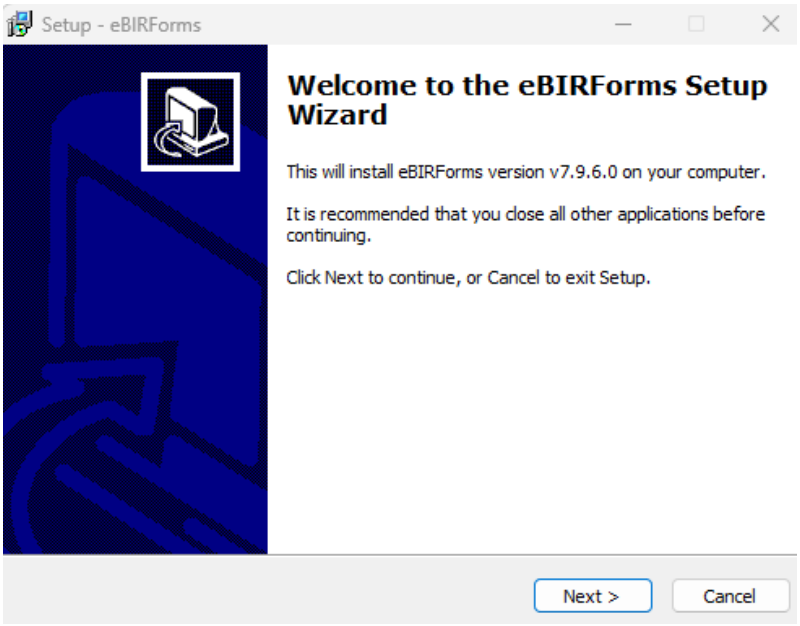
https://www.bir.gov.ph/ebirforms

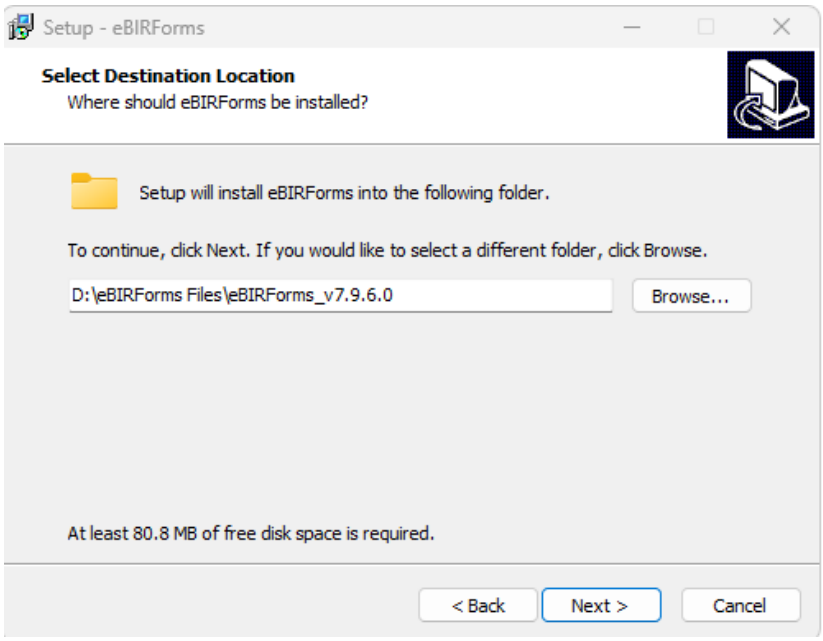
Step 2: Unzip and then Double-click the installer file to begin the installation.



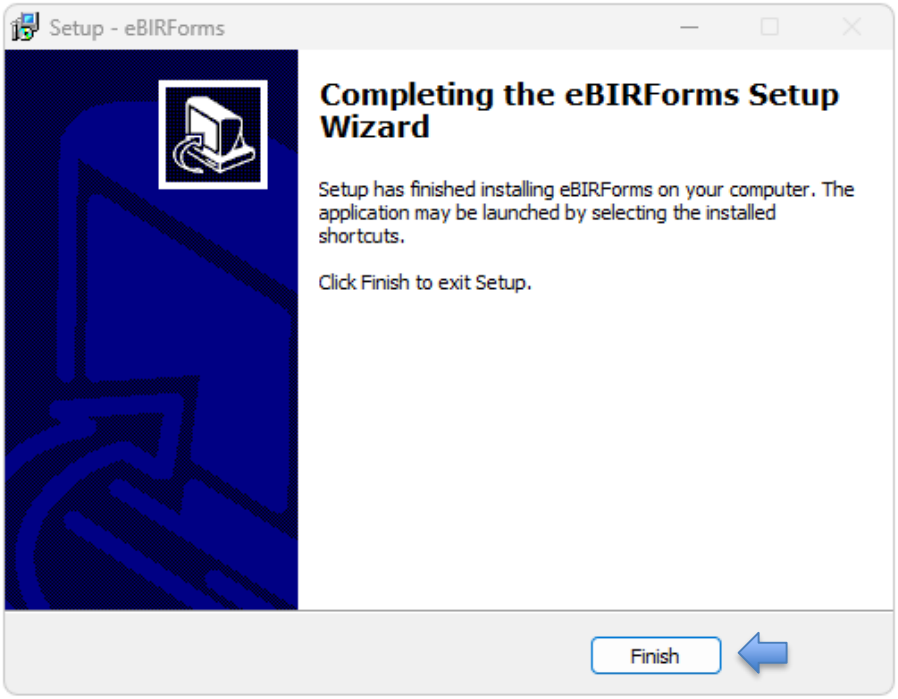
Step 3: Follow the on-screen instructions and select the installation directory.

Note: Do not overwrite existing eBIRForms installations. Save the new Offline Package in a separate directory or rename the file if an older version is installed.



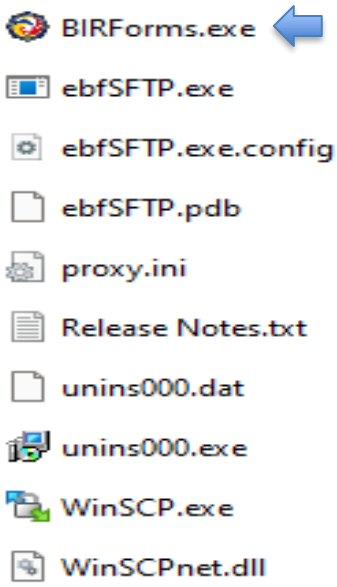


Step 4: Click Finish once installation is completed.



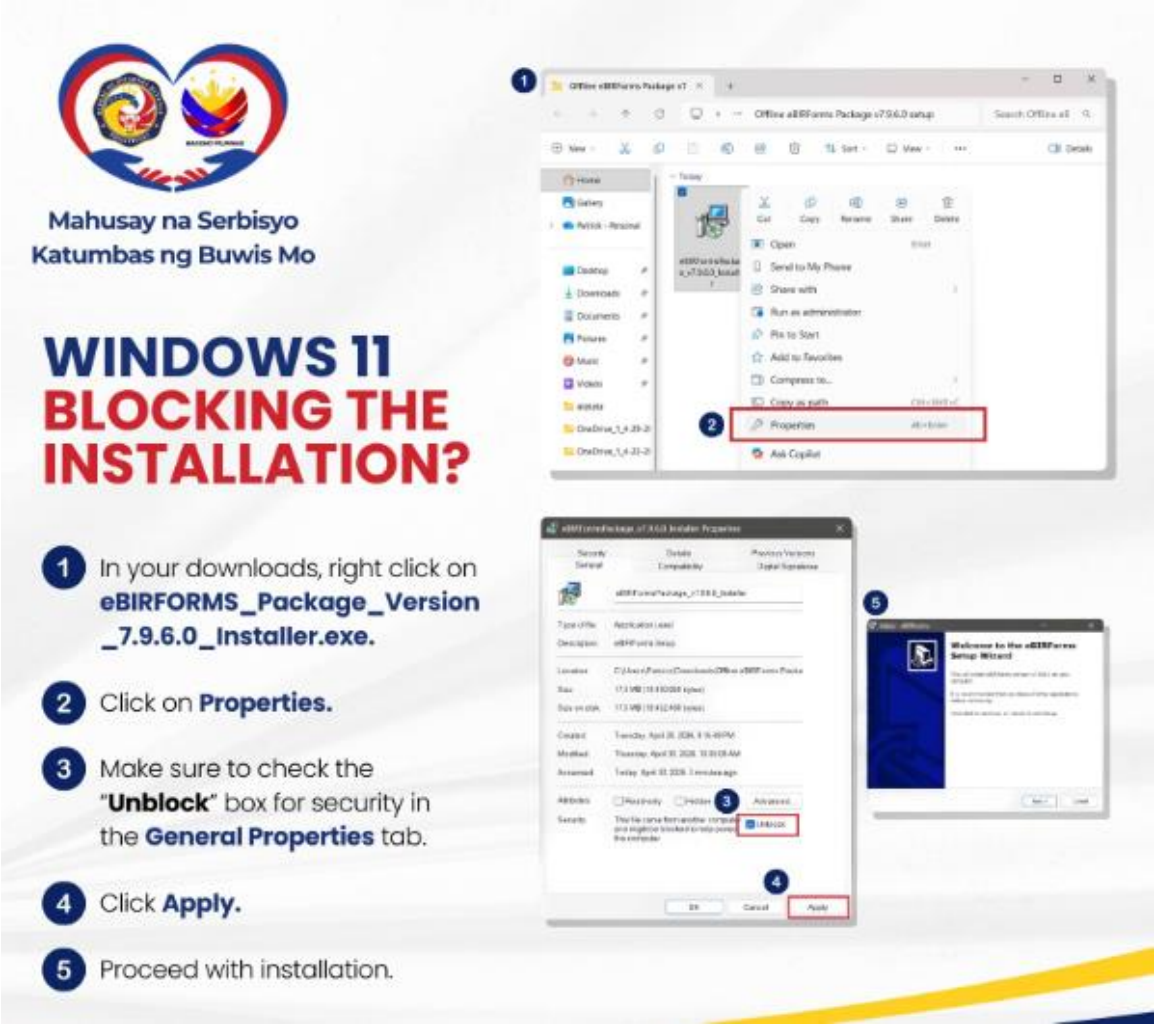
4. Accessing the eBIRForms Package/Application

Step 1: Locate the eBIRForms icon on the desktop or into the installed folder and then double-click the icon to open the application.



Step 2: Fill-up the PROFILE Page

5. What to Do When Windows 11 – Blocking the installation of the new version of eBIRForms Offline Package



6. How to transfer data to the latest version of eBIRForms Offline Package

Step 1: Locate your old data folder in your PC directory (old version of eBIRForms Offline Package)

Step 2: Copy the files from the following folders

- Profile
- Logfile
- Savefile
- Success

Step 3: Paste the copied files into the eBIRForms new version corresponding folder directory

- Profile
- Logfile
- Savefile
- Success

Step 4: To view the returns. Go to the "Profile folder" and rename the file. Add two (2) zeros (00) before the branch code to match the new five (5) digit branch code

From "123456789000" to "12345678900000

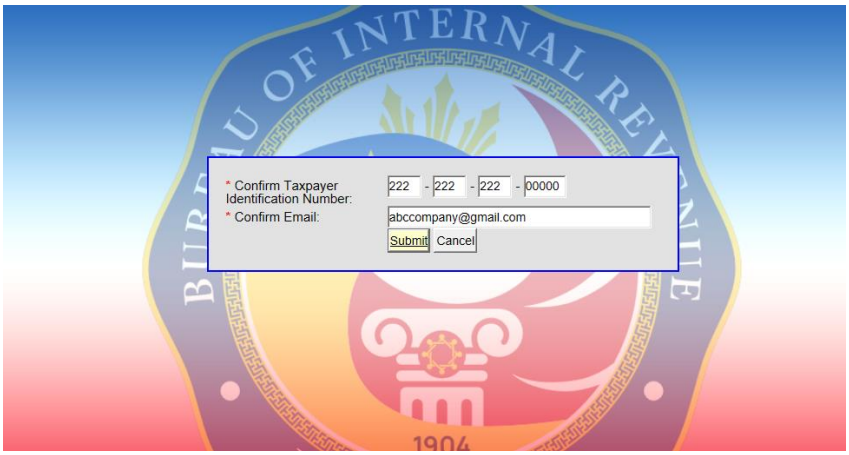
Step 6: Open the new version and check if your previous filing are already visible

7. How to Properly Accomplish the eBIRForms

Step 1: Fill-out the PROFILE Page

Note: Ensure that the **branch code** consists of **five digits (i.e. 00000)**

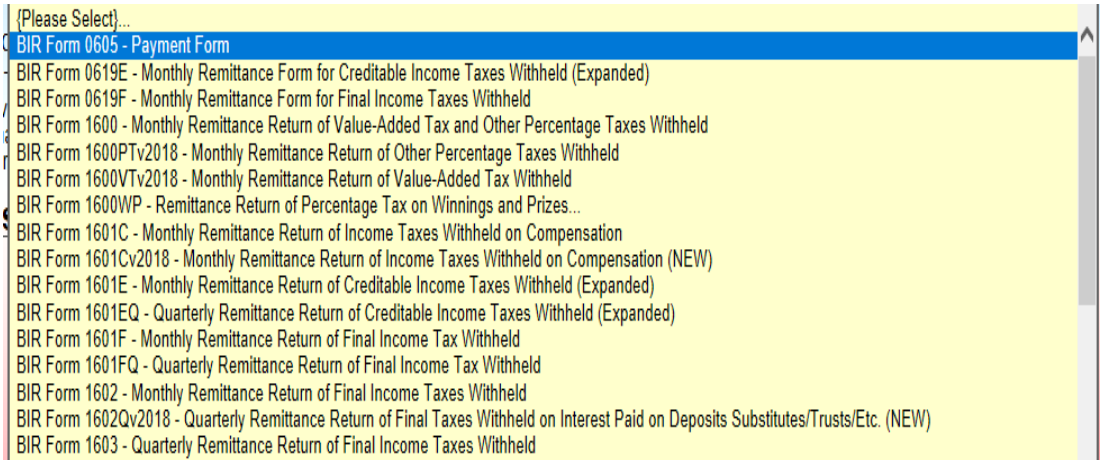
Step 2: A pop-up message will appear to confirm that the TIN and email address are correct.



Note: Ensure that the branch code consists of five digits (i.e. 00000)

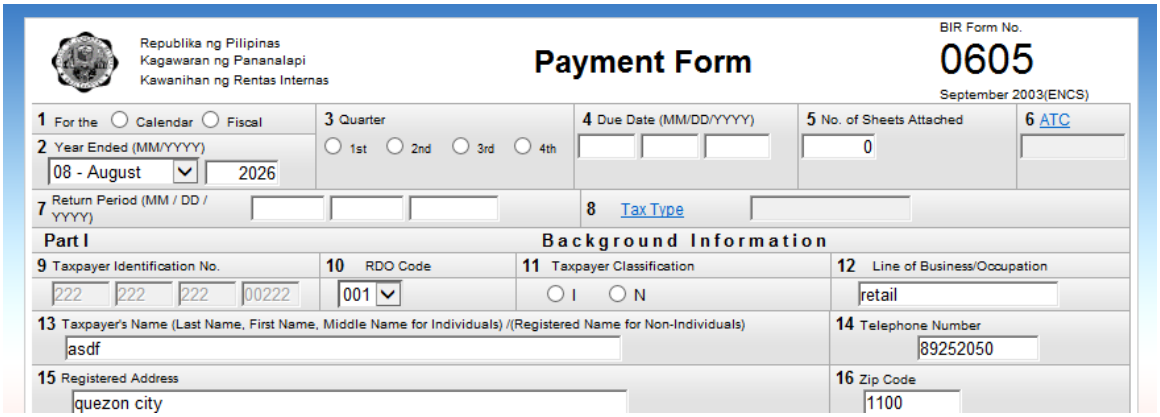
Click on SUBMIT.

Step 3: After accomplishing the Profile Page. **Select the desired BIR Form** from the list of available forms.



Step 4: Step 2: Click the "Fill-up" button.

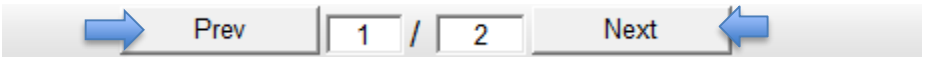
Step 5: The information entered in the Profile Page shall be automatically pre-filled in the form.



Step 6: **Please complete all mandatory fields and required information.**

Step 7: Users should ensure that all field are properly filled out.

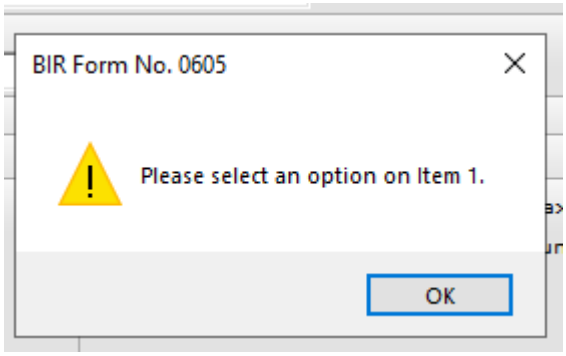
Step 8: Use the PREV and NEXT buttons to move to the previous or next page of the form.



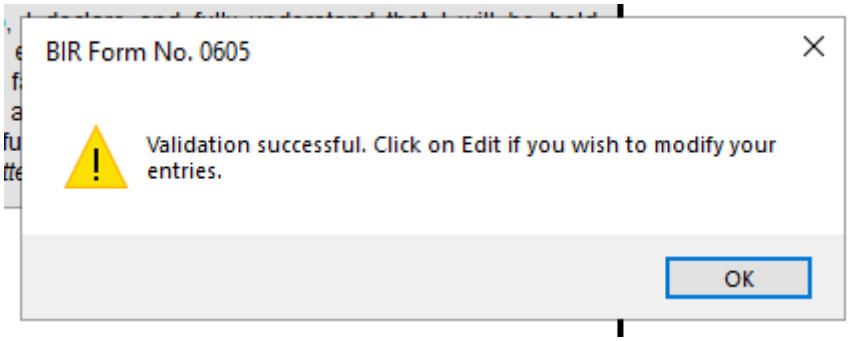
8. Validation, Saving, and Printing

Step 1: VALIDATE. The user should validate the accomplished form by clicking the **Validate** button provided on the page. Upon validation, all applicable fields with automatic computations will be recalculated to ensure accuracy.

A **message or warning will be displayed if any mandatory taxpayer information or items are left blank or contain invalid data.** After clicking OK on the validation message, the cursor will automatically focus on the field where the error was detected, allowing the user to correct the entry promptly.



After a successful validation, **a confirmation message will be displayed**. Upon clicking OK on the confirmation message, the Validate button on the main form will be disabled, while the Edit, Save, Print, and Submit/Final Copy buttons will be enabled.



All fields in the form will also be disabled to prevent further editing or modification of the validated data. This process ensures that only validated tax returns are allowed to proceed for submission.

Step 2: EDIT. Users may still edit the information in the form by clicking the Edit button, all applicable fields will be enabled for editing.

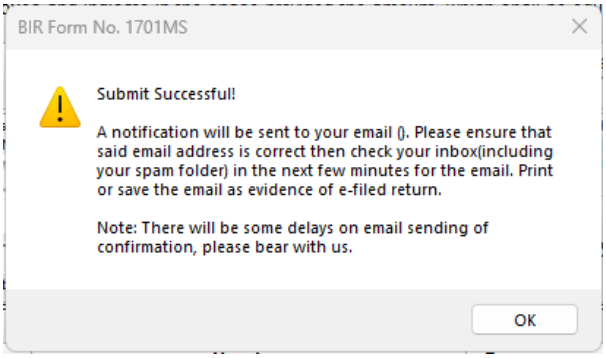
Step 3: SAVE. Upon clicking the Save button, all applicable fields with automatic computations are recalculated to ensure accuracy. The system then converts the data into an XML file and saves it user's local drive for retrieval later.

Step 4: PRINT. Upon clicking the Print button, the system directs the user to the Print Preview page. In the Print Preview page, the user may perform the following actions:

File > Print – Allows the user to print the accomplished form.

File > Cancel Print – Cancels the printing process and returns the user to the form screen without printing the accomplished form.

Step 5: SUBMIT/FINAL COPY. Upon clicking this command button, a prompt will be displayed reminding the user to ensure that there is an active internet connection and that a valid email address is indicated in the tax return.

After clicking OK, the Terms of Service Agreement (TOSA) page will be displayed, which the user must accept by clicking OK to proceed.

Once the submission is successfully completed, a confirmation message will appear informing the user that a notification has been sent to the email address specified in the Profile page.