



Form 61B – Steps to upload

Contents

Prerequisites to upload Form 61B..... 3

JAVA Utility – General Instructions..... 3

Step 1: ITDREIN Generation..... 3

Step 2: Addition/deactivation of Authorised Person 4

Step 3: Preparation of Form 61B for submission 4

Step 4: Preparation DSC Signature File (Original Form 61B and Correction Form 61B)..... 4

Step 5: Uploading Form 61B..... 5

Step 6: Submission of Nil return..... 5

Validation Rules – Form 61B Post upload..... 6

Prerequisites to upload Form 61B

- **Entity PAN** should be **registered** in e-Filing Portal
- ITDREIN should be generated after logging in with **Entity PAN**
- EMAIL ID and Mobile Number of Authorized Person (designated director or principal officer) should be specified
- **Activation Link** and Mobile Number will be sent to EMAIL ID and Mobile Number of Authorized Person
- **Designated Director** and **Principal Officer** PAN should be Valid and registered in e-Filing
- **Only Designated Director** can Upload and View Form 61B where as **Principal Officer** Can only view Form 61B
- **Designated Director DSC should be valid** and registered in e-Filing portal

JAVA Utility – General Instructions

- The JAVA utility of Form 61B will help in generating a zip file for uploading in e-Filing portal. A valid zip file can be generated only after filling all the mandatory fields.
Option of "Import CSV" is available and the Instructions to fill CSV file are provided under "Help" link within the utility.
- To know more on how to install/configure and run java, please [click here](#)
- Pre-requisites for running the JAVA utility
 1. The JAVA utility can be run on operating systems like Windows 7.0 or above, latest Linux and Mac OS 10.10(OS X Yosemite), where Java Runtime Environment Version 7 Update 6 (jre 1.7 is also known as jre version 7) or above is installed.
 2. To download java, please use the link → [Java Runtime Environment Version 7 Update 6 or above\(32 bit\)](#) (jre 1.7/7).
 3. Make sure you have the latest version of the utility before you start filling the information into the utility.
 4. The downloaded ZIP folder of Form 61B should be Extracted/Unzipped before opening the JAVA utility.
- To know more about the process of Registration, Upload & View of Form 61B using ITDREIN, please [click here](#).

Step 1: ITDREIN Generation

- Login to e-Filing Using Entity PAN user id and credentials
- Navigate to tab "**My Accounts**" → Select "**Manage ITDREIN**"
- Click "**Generate New ITDREIN**"
- Select "**Form Type**" from the drop down provided
- Select "**Reporting Entity Category**" from the drop down provided
- Fill all the "**Mandatory fields**" → Click on "**Generate ITDREIN**"
- Success message is displayed

Step 2: Addition/deactivation of Authorised Person

- Click on the ITDREIN (**16 Alpha number "User ID"**) link for which the Authorised person to be added
- Click on "**Add Authorised Person**"
- Select "**Authorised Person Type**"
 - "Designated Director" – Can Upload and View Form 61B
 - "Principal Officer" – Can only View the uploaded Form
- Fill all the "Mandatory fields" → Click on "**Add Authorised Person**"
- Activation link is sent to the Authorised Person EMAIL ID and PIN to the mobile number updated.
- Authorised Person needs to activate the link, update the PIN received through the registered mobile and set the password to login to e-Filing

To deactivate/change authorized person:

- Click on the ITDREIN under which the "Authorised Person" to be De-activated.
- Click on the **De-activate** link to de-activate the Authorised Person
- To add another Authorised Person for the generated ITDREIN, click on **Add Authorised person** as appearing below the table and follow the process as mentioned in "Steps to add Authorized person" section above

Step 3: Preparation of Form 61B for submission

- E-Filing Home page → **Download Form 61B utility** under "**Forms (Other than ITR)**"
- Extract the downloaded Form 61B utility
- Fill all the mandatory fields
- Click on "**Generate XML**" → Zip file is generated

Step 4: Preparation DSC Signature File (Original Form 61B and Correction Form 61B)

- E-Filing Home page → "**Download DSC Management Utility**"
- Extract the DSC Management utility
- Navigate to the Tab "**Bulk Upload**"
 - Select the ZIP file to be Signed (**Browse the 61B Zip File**)
 - Enter e-Filing User id (**ITDREIN User ID**)
 - Enter PAN of the DSC (**Authorized Person Pan**)
 - Select the type of DSC (**PFX or USB Token**)
 - Select your certificate Keystore (**Browse the DSC file**).
- Click "**Generate Signature File**" → Save the file

Note: - DSC should be of the Designated Director pan which is registered in the e-Filing.

Step 5: Uploading Form 61B

- Click on Login → Enter “**16 digit ITDREIN User ID**”
- Enter **Authorised person PAN**
- Enter **Password**
- Navigate to tab “**e-File**” → Click on **upload Form 61B**
- Select the “**Calendar Year**” from the drop down provided
- Select the “**Type of Filing**” from the drop down provided
 - Original Form 61B
 - Correction Form 61B
 - Submit Nil Statement
- Click on “**Validate**” to proceed further
- Upload the “**Zip file**” generated using the Form 61B Utility
- Upload the “**DSC Signature file**” generated using the DSC utility
- Click on “**Upload**”
- Success message is displayed.

Note: - DSC should be of the Designated Director pan which is registered in the e-Filing.

Step 6: Submission of Nil return

- Click on Login → Enter “**16 digit ITDREIN User ID**”
- Enter **Authorised person PAN**
- Enter **Password**
- Navigate to tab “**e-File**” → Click on **upload Form 61B**
- Select the “**Calendar Year**” from the drop down provided
- Select the “**Type of Filing**” from the drop down provided
 - Submit Nil Statement
- Click on “**Validate**” to proceed further
- Upload the “**DSC Signature file**” generated using the DSC utility
- Select the radio button “**For pre-existing accounts (As defined in Rule 114H(2)(h))**”
- Select the radio button “**For New accounts (As defined in Rule 114H(2)(d))**”
- Click on “**Submit**”
- Success message is displayed.

Note: - DSC should be of the Designated Director pan which is registered in the e-Filing.

Validation Rules – Form 61B Post upload

| Rule ID | Description | Element | Reference (Notified Form) |
|---------|---|---|---------------------------|
| 1 | Number of Reports mentioned in Part A does not match with actual number of reports in Part B. | Number of Reports | A.2.8 |
| 2 | The Report Serial Number is not unique within the Statement. | Report Serial Number | B.1.1 |
| 3 | Valid Option for Account Holder Type for US Reportable Person is not selected in report of US reportable accounts under Rule 114G | Account Holder Type for US Reportable Person | B.5.3 |
| 4 | Valid Option for Account Holder Type for Other Reportable Person is not selected in report of other reportable accounts under Rule 114G | Account Holder Type for Other Reportable Person | B.5.4 |