



**User Manual**  
**ITDREIN Registration and Upload of**  
**Form 61 and Form 61A**

**Version 1.1**

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## ITDREIN Registration and Upload of Form 61 and Form 61A

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### Document Revision List

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## ITDREIN Registration and Upload of Form 61 and Form 61A

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### Introduction

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

ITDREIN is the Unique ID issued by ITD which will be communicated by ITD after the registration of the reporting entity with ITD. The ITDREIN is a 16-character identification number in the format XXXXXXXXXXXX.YZNNN where

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

### ITDREIN Services

The below table provides the services available for ITDREIN Users.

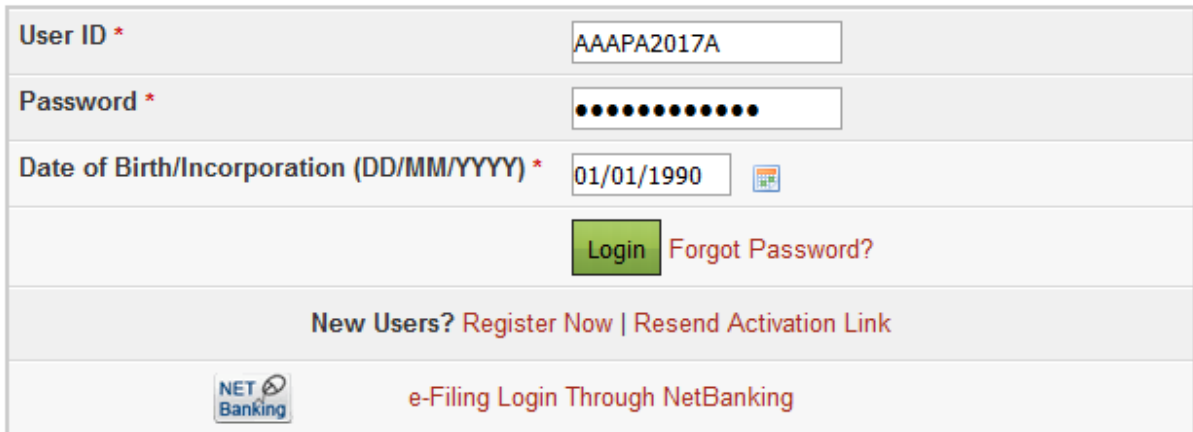
S.N	Services
1	Upload and View Form 61
2	Upload and View Form 61A

# ITDREIN Registration and Upload of Form 61 and Form 61A

## Steps to Generate ITDREIN

**Step 1 – Login** to e-Filing portal using **User ID**, e-Filing **Password** and **DOB/DOI**.

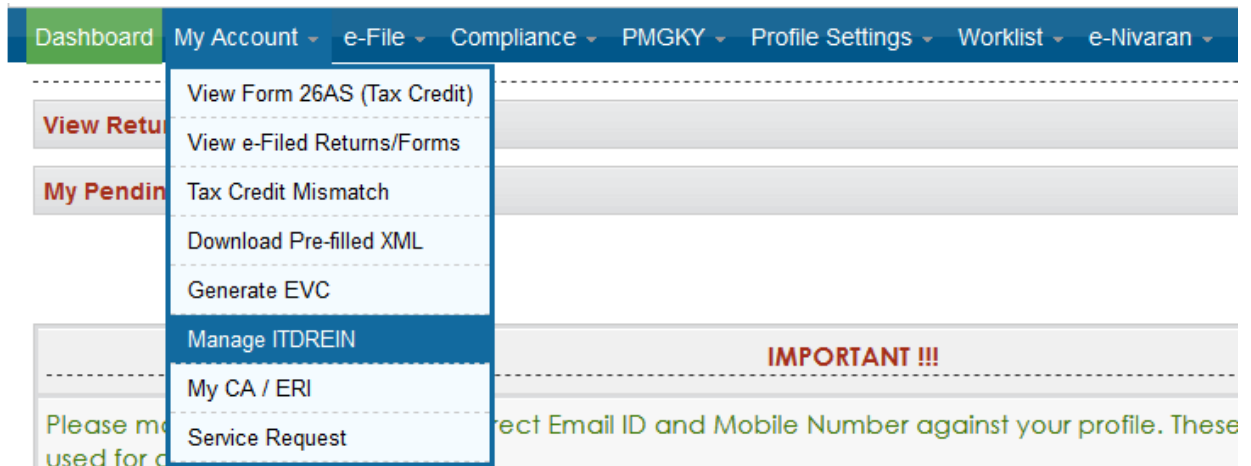
Login



The login form contains the following fields and elements:

- User ID \***: Input field with value AAAPA2017A
- Password \***: Input field with masked characters (dots)
- Date of Birth/Incorporation (DD/MM/YYYY) \***: Input field with value 01/01/1990 and a calendar icon
- Login**: Green button
- Forgot Password?**: Red text link
- New Users? Register Now | Resend Activation Link**: Red text link
- NET Banking**: Logo
- e-Filing Login Through NetBanking**: Red text

**Step 2 – Go to My Account → Manage ITDREIN.**



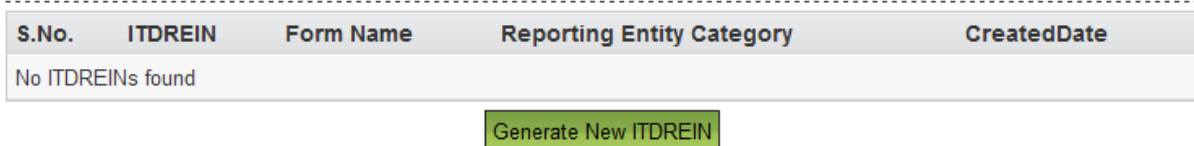
The 'My Account' dropdown menu includes the following options:

- View Form 26AS (Tax Credit)
- View e-Filed Returns/Forms
- Tax Credit Mismatch
- Download Pre-filled XML
- Generate EVC
- Manage ITDREIN** (highlighted)
- My CA / ERI
- Service Request

Background text includes: **IMPORTANT !!!** and Please me... used for c... ect Email ID and Mobile Number against your profile. These

**Step 3 – To generate new ITDREIN** click on the button "Generate New ITDREIN".

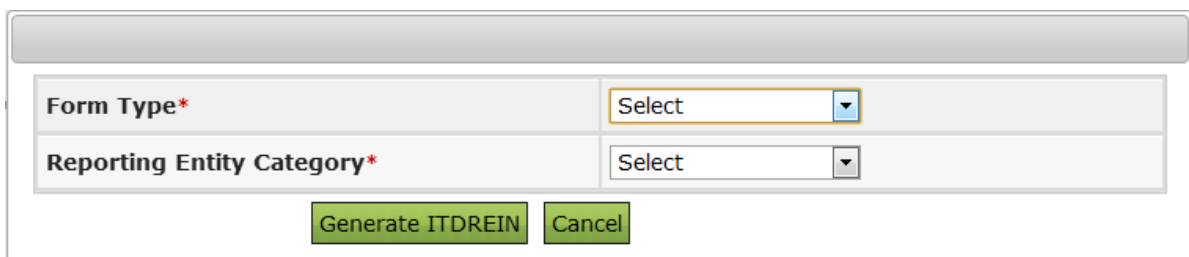
Manage ITDREIN



S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
No ITDREINs found				

**Generate New ITDREIN** (Green button)

**Step 4 – A Pop up** with Form Type and Reporting Entity Category is displayed. Select the Form Type and Reporting Entity Category from the dropdown.



The pop-up form contains the following fields and elements:

- Form Type\***: Dropdown menu with value Select
- Reporting Entity Category\***: Dropdown menu with value Select
- Generate ITDREIN**: Green button
- Cancel**: Green button

## ITDREIN Registration and Upload of Form 61 and Form 61A

**Step 5** – Based on the Form Type and Reporting Entity Category selected, the ITDREIN will be generated and the user will be able to upload and view the corresponding Form.

**Step 6** – Click **Generate ITDREIN** button

**Step 7** – Success Message is displayed as shown below. User receives a confirmation e-mail on successful **generation of ITDREIN** to the **registered Email ID**. An SMS is also sent to the **registered Mobile number**.



**Step 8** – On Successful Generation of ITDREIN, the screen is displayed as shown.

[Manage ITDREIN](#)

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	PERAA8001A.AB224	Form 61	Banking company	10/03/2016

Generate New ITDREIN

# ITDREIN Registration and Upload of Form 61 and Form 61A

## Steps to Add Authorised Person

**Step 1 – Login** to e-Filing portal using **User ID**, e-Filing **Password** and **DOB**.

Login

User ID *	<input type="text" value="AAAPA2017A"/>
Password *	<input type="password" value="●●●●●●●●"/>
Date of Birth/Incorporation (DD/MM/YYYY) *	<input type="text" value="01/01/1990"/>
<input type="button" value="Login"/> <a href="#">Forgot Password?</a>	
New Users? <a href="#">Register Now</a>   <a href="#">Resend Activation Link</a>	
e-Filing Login Through NetBanking	

**Step 2 – Go to My Account → Manage ITDREIN.**

**Step 3 – To add Authorised Person** for the generated ITDREIN, click on the link provided in the **ITDREIN** Column.

Manage ITDREIN

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	<span style="border: 2px solid red; padding: 2px;">PERPA1996D.AB930</span>	Form 61A	Banking company	21/12/2016

**Step 4 – Click on the button Add Authorised Person.**

Manage ITDREIN

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

## ITDREIN Registration and Upload of Form 61 and Form 61A

**Step 5** – A Pop up with Authorised Person details appears as shown below.

The form contains the following fields and options:

- Authorised Person Type \***: Select (dropdown menu with options: Designated Director, Principal Officer)
- PAN \***: [Text Input]
- Person Name\***: [Text Input]
- Designation \***: [Text Input]
- Access Type \***: Upload and View (dropdown menu)
- Date of Birth (DD/MM/YYYY)\***: [Text Input]
- Mobile No. \***: +91 [Text Input]
- Email ID \***: [Text Input]
- Flat/Door/Building \***: [Text Input]
- Road/Street**: [Text Input]
- Area/Locality \***: [Text Input]
- Town/City/District \***: [Text Input]
- Pincode \***: [Text Input]
- State \***: Select (dropdown menu)
- Country \***: Select (dropdown menu)

Buttons: Add Authorised Person, Cancel

### Notes:

1. If the Form Type is FORM 61A user needs to select "Authorised Person Type" from the drop down.
2. Under "Authorised Person Type" for "**Designated Director**", the facility to "Upload" and "View" Form 61A shall be available.
3. For "**Principal Officer**", the option to "View" Form 61A shall only be available.
4. The details of "Authorised Person" cannot be edited further.
5. This field is not available for "Form 61".

**Step 6** – Enter all the details and Click on **Add Authorised Person** button. Success Message is displayed as shown below

Authorized Person Added Successfully

OK

### Manage ITDREIN

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status	
1	Designated Director	XXXPX3305X	SWAMY AAA RAM	DR	Upload and View	18/03/2016	-	Pending Activation	<a href="#">Resend Activation Link</a>

Back Add Authorised Person

**Step 7** – User receives a confirmation e-mail on successful **Addition of Authorised Person** to the **registered Email ID**. An SMS is also sent to the **registered Mobile number**



## ITDREIN Registration and Upload of Form 61 and Form 61A

**Step 8** – Authorised Person receives a confirmation e-mail with an **activation link to the Authorised Person’s Email ID**. An SMS along with OTP (One time Password) is sent to the **Authorised Person’s Mobile Number**.

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

### Activation

ITDREIN	XXXXAX8001X.BD225
Authorised Person PAN	XXXPX2300X
Authorised Person Name	AAA BBB CCC
Mobile Pin *	<input type="text"/>
Password *	<input type="text"/> Zero Length
Confirm Password *	<input type="text"/>
<input type="button" value="Activate"/>	

**Step 9:** After the Authorised person is activated, Authorised person can view the details as below.

### Manage ITDREIN

Authorised Person Details		Additional Details						
S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
1	Designated Director	AQZPK2300C	RAM	Director	Upload and View	24/05/2016	-	Active <a href="#">De-activate</a>


# ITDREIN Registration and Upload of Form 61 and Form 61A

## Steps to Upload Forms

### (i) Upload Form 61

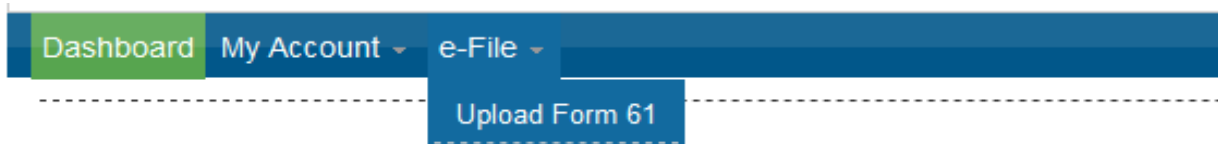
**Step 1 – Login** to e-Filing portal using **ITDREIN, Authorised Person PAN and Password.**

Login

User ID *	<input type="text" value="PERPA1995D.ZN767"/>
Authorised Person PAN *	<input type="text" value="AQZPK2300C"/>
Password *	<input type="password" value="••••••••"/>
<input type="button" value="Login"/> <a href="#">Forgot Password?</a>	
<a href="#">New Users? Register Now</a>   <a href="#">Resend Activation Link</a>	
 e-Filing Login Through NetBanking	

**Step 2 –** Based on the Form Type and Reporting Entity Category selected during registration, the ITDREIN user will be able to upload and view the corresponding Form.

**Step 3 –** Go to **e-File** → **Upload Form 61**



**Step 4 –** Enter the following details and click on **Validate.**

Upload Form 61

Step 1: Enter Statement Details		Step 2: Upload File	Step 3: Upload Successful
<b>Statement Details</b>			
PAN *	<input type="text" value="PERPA1995D"/>		
Form Name *	<input type="text" value="FORM61"/>		
Financial Year *	<input type="text" value="Select"/>		
Reporting Entity Category *	<input type="text" value="Depository"/>		
Half Year *	<input type="text" value="Select"/>		
Upload Type *	<input type="text" value="Select"/>		
<input type="button" value="Validate"/>			

In Upload Type shall be provided – a) Original Form

**Step 5 –** On successful validation upload the corresponding ZIP file, generate the Signature file using DSC Management Utility and Click on Upload.

## ITDREIN Registration and Upload of Form 61 and Form 61A

### Upload Form 61

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

**Submit Form 61**

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

[Click here to download the DSC Utility](#) ?

**Steps to Digitally Sign the Form:**

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

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

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

**Step 6** – On successful upload user records are captured in the e-Filing system and the below success message must be displayed along with the Transaction ID.

### Upload Successful

Step 1: Enter Statement Details

Step 2: Upload File

Step 3: Upload Successful

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

An e-mail confirming the successful submission of your Form along with the Receipt number has been sent to [assessee@mail.com](mailto:assessee@mail.com)

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

**Step 7** – Once uploaded the status of the statement shall be "Uploaded". The uploaded file shall be processed and validated. Upon validation the status shall be either "Accepted" or "Rejected" which will reflect within 24 hours from the time of upload. In case if "Rejected", the rejection reason shall be available by clicking on "Transaction No." post login under **My Account** → **View Form 61**.

### View Filed Form 61


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

## ITDREIN Registration and Upload of Form 61 and Form 61A

### (ii) Upload Form 61A

**Step 1 – Login** to e-Filing portal using **User ID (ITDREIN)**, **Authorised Person PAN**, and **Password**.

[Login](#)

User ID *	<input type="text" value="AAAPA3000A.AZ151"/>
Authorised Person PAN *	<input type="text" value="AQZPK2300C"/>
Password *	<input type="password" value="••••••••"/>
<input type="button" value="Login"/> <a href="#">Forgot Password?</a>	
<a href="#">New Users? Register Now</a>   <a href="#">Resend Activation Link</a>	
 e-Filing Login Through NetBanking	

**Step 2 – Go to e-File → Upload Form 61A.**

<a href="#">Dashboard</a>	<a href="#">My Account</a>	<a href="#">e-File</a>	<a href="#">Upload Form 61A</a>
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**Step 3 – The upload screen will have the below details.**

- **Reporting Entity PAN**
- **Form Name**
- **Reporting Entity Category**

**Attach the Form 61A (.zip) File** along with the **Signature file** and click on **“Upload”**.

[Submit Form61A](#)

Step 1: Upload File      Step 2: Upload Successful

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

## **ITDREIN Registration and Upload of Form 61 and Form 61A**

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**Step 4** – On successful validation, the success message shall be displayed as follows.

[Submit Form 61A](#)

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Step 1: Upload File

**Step 2: Upload Successful**

FORM61A has been filed and the Transaction ID is: **1000725741** In case of any queries, please contact 1800 4250 0025.

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

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


# ITDREIN Registration and Upload of Form 61 and Form 61A

## Steps to View Forms

### (i) View Form 61

**Step 1 – Login** to e-Filing portal using **ITDREIN, Authorised Person PAN and Password.**

Login

User ID *	<input type="text" value="PERPA1995D.ZN767"/>
Authorised Person PAN *	<input type="text" value="AQZPK2300C"/>
Password *	<input type="password" value="••••••••"/>
<input type="button" value="Login"/> <a href="#">Forgot Password?</a>	
<a href="#">New Users? Register Now</a>   <a href="#">Resend Activation Link</a>	
 e-Filing Login Through NetBanking	

**Step 2 –** Based on the Form Type and Reporting Entity Category selected during registration, the ITDREIN user will be able to upload and view the corresponding Form.

**Step 3 –** Go to **My Account** → **View Form 61**

Dashboard	My Account ▾	e-File ▾
	View Form 61	

**Step 4 –** Enter the following details and click on **View Details.**

View Filed Form 61

PAN	<input type="text" value="PERPA1995D"/>
Financial Year *	<input type="text" value="Select"/>
Form Name *	<input type="text" value="Select"/>
Half Year *	<input type="text" value="Select"/>
<input type="button" value="View Details"/>	

**Step 5 –** The below details are displayed to the user

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

View Filed Form 61

PAN	PERPA1995D	Financial Year	2016	Form Name	FORM61	Half Year	H1
S.No	Transaction No	Filed On	Upload Type	Status			
1	<span style="border: 1px solid red; padding: 2px;">1000727972</span>	13/01/2017	Original	Accepted			
2	1000727876	13/01/2017	Original	Uploaded			

## ITDREIN Registration and Upload of Form 61 and Form 61A

**Step 6** – User can see the below details by clicking on “Transaction No”

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

### Details Of Transaction Number - 1000727972

PAN	Financial Year	Form Name	Half Year
PERPA1995D	2016	FORM61	H1

### Statement Details


Status	Acknowledgement Number	Attachments
Successfully e-Filed	100384921130117	ZIP
		Receipt

# ITDREIN Registration and Upload of Form 61 and Form 61A

## (ii) View Form 61A

**Step 1 – Login** to e-Filing portal using **User ID (ITDREIN)**, **Authorised Person PAN**, and **Password**.

Login

User ID *	<input type="text" value="AAAPA3000A.AZ151"/>
Authorised Person PAN *	<input type="text" value="AQZPK2300C"/>
Password *	<input type="password" value="••••••••"/>
<input type="button" value="Login"/> <a href="#">Forgot Password?</a>	
<a href="#">New Users? Register Now</a>   <a href="#">Resend Activation Link</a>	
 e-Filing Login Through NetBanking	

**Step 2 – Go to My Account → View Form 61A.**

Dashboard	My Account ▾	e-File ▾
<a href="#">View Form 61A</a>		

**Step 3 –** The user has to select the **Assessment Year**, **Filing Status** and click on “View Details”.

Dashboard	My Account ▾	e-File ▾
View Filed Form 61A		
Reporting Entity PAN	<input type="text" value="PERHA8001W"/>	
Form Name	<input type="text" value="FORM61A"/>	
Assessment Year *	<input type="text" value="Select"/>	
Filing Status *	<input type="text" value="Select"/>	
<input type="button" value="View Details"/>		

**Step 4 –** The Filing Status field will have the below details.

- **Uploaded**
- **Accepted**
- **Rejected**

Dashboard	My Account ▾	e-File ▾
View Filed Form 61A		
Reporting Entity PAN	<input type="text" value="PERHA8001W"/>	
Form Name	<input type="text" value="FORM61A"/>	
Assessment Year *	<input type="text" value="2016"/>	
Filing Status *	<input type="text" value="Select"/>	
<input type="button" value="View Details"/>		

**Step 4 –** This status will initially be displayed as “**Uploaded**”. When User selects filing status as “Uploaded” the following screen is displayed with Transaction Details.



## ITDREIN Registration and Upload of Form 61 and Form 61A

Dashboard My Account e-File					
View Filed Form 61A					
Reporting Entity PAN	PERHA8001W	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000728127	14/01/2017	-	Uploaded	

**Step 4** – If the Uploaded Form is processed then Filing status shall be updated based on the validation done on the uploaded file and displayed as **Accepted/Rejected**. When the status is “Accepted” then the following screen is displayed to the user.

View Filed Form 61A					
Reporting Entity PAN	PERPA3000A	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000725741	12/01/2017	0	Accepted	

**Note:** The updated status can be checked by the user after 24Hours of upload.

**Step 5** – By clicking on “Transaction No”, the below details shall be displayed. The uploaded file can be downloaded by clicking on the link “**ZIP**”.

Details Of Acknowledgement Number - 1000725741 <span style="float: right; font-size: small;">✕</span>		
Reporting Entity PAN	Calendar Year	Form Name
PERPA3000A	2016	FORM61A
Statement Details		
Status	Acknowledgement Number	ZIP
Accepted	100383991120117	ZIP

**Step 6** – If the status is “Rejected” then the following screen is displayed to the user.

Dashboard My Account e-File					
View Filed Form 61A					
Reporting Entity PAN	PERHA8001W	Calendar Year	2016	Form Name	FORM61A
S.No	Transaction No	Filed On	Filing Type	Status	
1	1000728145	14/01/2017	-	Rejected	

**Step 7** – By clicking on “Transaction No”, the error description is displayed on the screen.

Details Of Acknowledgement Number - 1000728145 <span style="float: right; font-size: small;">✕</span>		
Reporting Entity PAN	Calendar Year	Form Name
PERHA8001W	2016	FORM61A
Error Details		
Status	Error Description	
Rejected	The XML Schema is invalid. Please upload the XML in the correct schema.	

## ITDREIN Registration and Upload of Form 61 and Form 61A

### Steps to De-activate Authorised Person

**Step 1 – Login** to e-Filing portal using **User ID**, e-Filing **Password** and **DOB**.

**Step 2 – Go to My Account →Manage ITDREIN.**

**Step 3 – Click on the ITDREIN** under which the “Authorised Person” to be De-activated.

#### Manage ITDREIN

S.No.	ITDREIN	Form Name	Reporting Entity Category	CreatedDate
1	PERPA1994D.AS708	Form 61A	Securities market intermediary	14/10/2016
2	PERPA1994D.AI707	Form 61A	Insurer	14/10/2016
3	PERPA1994D.AN706	Form 61A	NBFC/Nidhi	14/10/2016
4	PERPA1994D.AB481	Form 61A	Banking company	21/07/2016

Generate New ITDREIN

**Step 4 – Click on the De-activate** link to de-activate the Authorised Person.

#### Manage ITDREIN

S.No.	Authorised Person Type	PAN	Name	Designation	Access Type	Created date	Date of De-Activation	Status
1	Designated Director	AQZPK2300C	TCS1	manager	Upload and View	14/10/2016	-	Active <a href="#">De-activate</a>

Back

Add Authorised Person

**Step 5 –**After clicking on the de-activate link, a Success Message for De-activating will be displayed and the Date of De-activation will be recorded.

#### Manage ITDREIN

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

Back

Add Authorised Person

**Step6:** 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

## ITDREIN Registration and Upload of Form 61 and Form 61A

### Annexure 1:

#### List of Form Codes and Form Types

Form Code	Form Type
Z	61
A	61A

#### List of Reporting Entity Category Code for Form 61 and Form 61A

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

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