

©Instructions for Filing Form 15CA & 15CB
REVISED PROCESS DOCUMENT



Steps (15CA Offline/Bulk Mode)		
Filing of Form 15CA		
Step	Action by	Action Description
Step 1	Taxpayer	Login to e-Filing portal. Navigate to “e-File” menu and select File Form 15CA under File Forms sub-menu.
Step 2	Taxpayer	On selection of Form 15CA, PAN/TAN of Assessee is auto populated. Provide Financial Year, Filing Type and Submission Mode “Offline/Bulk”.
Step 3	Taxpayer	Download the Form 15CA Offline Utility. Alternatively, the utility can also be downloaded from “Downloads” section of the Homepage under Income Tax Forms page.
Step 4	Taxpayer	Prepare individual XML’s for Remitter, Remittee and CA (only for Part-C) combination. Zip single/multiple XML’s. In case of Part-C, the taxpayer has to import XML of Form 15CB submitted by the CA. The submitted Form 15CB XML can be downloaded from View e-Filed Forms functionality post login.
Step 5	Taxpayer	Upload the zip file and submit using prescribed modes of e-verification. A Token Number is generated.
Step 6	Taxpayer	Login to e-Filing portal. Navigate to “e-File” menu and select View Form 15CA Offline/Bulk menu under View Income Tax Forms sub-menu.
Step 7	Taxpayer	The status of each individual XML under the Token Number will be shown as a Success or Failure once the processing is completed. In case an XML is a Success, an Acknowledgement Number is generated for each Form 15CA. Downloadable PDF of Form 15CA will be made available in view filed forms. A valid acknowledgement is also generated for submission of 15CA/CB.
Step 8	Taxpayer	In case of a Failure, no Acknowledgement Number will be generated and reasons for failure will be shown. Re-upload corrected XML file with corrected validations/data after considering reasons for failure. In this case the failed XML can be again zipped and uploaded. Taxpayers are also provided an export option to download the ARN number, processing status, XML file name to identify any failed XML’s.

Note: Only one Form 15CB Acknowledgement Receipt Number (ARN) can be used for filing one Form 15CA Part-C.

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Steps (15CB Offline/Bulk Mode)		
Appointment of CA		
Step	Action by	Action Description
<i>Step 1</i>	<i>Taxpayer</i>	Login to e-Filing Portal. Navigate to “My Chartered Accountant(s)” functionality under Authorised Partners menu. Add CA by providing the Membership Number. Assign Form by selecting Form 15CB, Financial Year and click ‘Add’. This is a one-time appointment to be made every Financial Year.
Filing of Form 15CB		
<i>Step 2</i>	<i>CA</i>	Login to e-Filing portal. Navigate to “e-File” menu and select File Form 15CB under File Forms sub-menu.
<i>Step 3</i>	<i>CA</i>	On selection of Form 15CB, User ID and PAN of CA is auto populated. Provide Filing Type, Submission Mode “Offline/Bulk” and Financial year.
<i>Step 4</i>	<i>CA</i>	Download the Form 15CB Offline Utility. Alternatively, the utility can also be downloaded from “Downloads” section of the Homepage under Income Tax Forms page.
<i>Step 5</i>	<i>CA</i>	Prepare individual XML’s for Remitter, Remittee and CA combination. A zip file containing one XML or multiple XML’s of different taxpayer can be uploaded in the system. There is no limit specified and taxpayer can submit any number of XML’s in a Single Zip File.
<i>Step 6</i>	<i>CA</i>	Login to e-filing Portal. Upload the zip file and submit under Digital Signature Certificate (DSC). A Token Number is generated.
<i>Step 7</i>	<i>CA</i>	Navigate to “e-File” menu and select View Form 15CB Offline/Bulk menu under View Income Tax Forms sub-menu.
<i>Step 8</i>	<i>CA</i>	The status of each individual XML under the Token Number will be shown as a Success or Failure once the processing is completed. In case an XML is a Success, an Acknowledgement Number is generated for each Form 15CB
<i>Step 9</i>	<i>CA</i>	In case of a Failure, no Acknowledgement Number will be generated and reasons for failure will be shown. Re-upload corrected XML file with corrected validations/data after considering reasons for failure. In this case the failed XML can be again zipped and uploaded. Downloadable PDF of Form 15CB in all successful cases will be made available in view filed forms. Taxpayers are also provided an export option to download the ARN number, processing status, XML file name to identify any failed XML’s and enable easy mapping of ARN number to a corresponding 15CA XML.

Note: Only one Form 15CB Acknowledgement Receipt Number (ARN) can be used for filing one Form 15CA Part-C.

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Steps (15CA Part-C and 15CB Online Mode)		
Appointment of CA		
Step	Action by	Action Description
Step 1	Taxpayer	Login to e-Filing Portal. Navigate to “My Chartered Accountant(s)” functionality under Authorised Partners menu. Add CA by providing the Membership Number. Assign Form by selecting Form 15CB, Financial Year and click ‘Add’. This is a one-time appointment to be made every Financial Year.
Filing of Form 15CB		
Step 2	CA	Login to e-Filing portal. Navigate to “e-File” menu and select File Forms sub-menu.
Step 3	CA	Select Form 15CB appearing under File Forms sub-menu.
Step 4	CA	On selection of Form 15CB, User ID and PAN of CA is auto populated. Provide PAN/TAN of the assessee to whom certificate in Form 15CB is required to be issued, Filing Type, Submission Mode “Online” and Financial year.
Step 5	CA	Click Continue. Navigate to Form 15CB Instructions Screen. Prepare Form 15CB and generate Preview. Proceed to e-Verify and submit under Digital Signature Certificate (DSC) of CA. An Acknowledgement Number is generated for Form 15CB. Downloadable PDF of Form 15CB will be made available in view filed forms. No acknowledgement will be generated till taxpayer files a valid 15CA quoting the acknowledgement number of 15CB.
Filing of Form 15CA Part-C		
Step 6	Taxpayer	Login to e-Filing portal. Navigate to “e-File” menu and select File Forms sub-menu.
Step 7	Taxpayer	Select Form 15CA appearing under File Forms sub-menu.
Step 8	Taxpayer	On selection of Form 15CA, PAN/TAN of Assessee is auto populated. Provide Financial Year, Filing Type and Submission Mode “Online”. Form 15CA with all Parts is displayed. Select Part-C radio button. Click Proceed. A pop up appears wherein taxpayer is expected to provide ARN of Form 15CB generated by CA.
Step 9	Taxpayer	Once Form 15CB ARN is validated, Part-C of Form 15CA is prefilled from Form 15CB.
Step 10	Taxpayer	Complete balance fields of Form 15CA Part-C and submit the Form using prescribed modes of e-verification. Downloadable PDF of Form 15CA will be made available in view filed forms. A valid acknowledgement is also generated for submission of 15CA/CB.

Note: Only one Form 15CB Acknowledgement Receipt Number (ARN) can be used for filing one Form 15CA Part-C.