

Procedure to upload ITR and Form 3CB/3CD Based on Personal Experience

1) Firstly **CHARTERED ACCOUNTANT** has to register on Income Tax Site:-

- a) Steps to Register:-
 - Go to incometaxindiaefiling.gov.in
 - Click on '**REGISTER YOURSELF**' or Click [Here](#)
 - Select the option **Tax professional – Chartered Accountants**
- b) Fill the Registration form
 - i) Selecting the option chartered accountant
 - ii) Provide the basic details:-
 - (1) Membership Number,
 - (2) Enrolment date as CA,
 - (3) Name (Surname, First Name and middle name),
 - (4) Date of Birth,
 - (5) PAN
 - (6) E-mail ID
 - iii) Now upload your digital signature
 - iv) Select the "**CONTINUE**" button.
- c) Page Two "**REGISTRATION FORM**" will open
 - i) You have to fill
 - (1) PASSWORD (The password will be, 8-14 characters and must have at least one alphabet, one number and one special character. Eg. Abcd1251@)
 - (2) CONTACT DETAILS
 - (3) Select and answer one primary question and one secondary question.
 - (4) Contact Details
 - (5) Landline number
 - (6) Mobile number, (Compulsory)
 - (7) Alternate number
 - (8) E-mail ID, (Compulsory)
 - (9) Alternate E-mail ID
 - (10) Press "Submit" button.

Note:- Future communications will be sent to mobile number and E-mail ID provide here, by the Income Tax Department.
 - ii) Upon successful submission of the Registration form:-
 - (1) A Transaction ID will be generated.
 - (2) An Activation link will be sent on your E-mail ID.
 - (3) User ID will be sent to you with the activation Link E-mail ID.
 - iii) Activate your account by clicking on the activation link.

2) Now "**ASSESSEE**" have to

- a) Log in To incometaxindiaefiling.gov.in as usual by his own user ID and password
- b) Go to "**MY ACCOUNT**"
- c) Select "**ADD CA OPTION**"
 - i) Fill Membership Number of CA (if the CA has registered himself as CHARTERED ACCOUNTANT already then his name will appear automatically)
 - ii) Select the **Form name 3CB/CD or 3CA/CD**
- d) Press "**SUBMIT**"

- e) Upon Success submission "**Message**" will appear with "**TRANSACTION ID**" (E-mail will be sent to selected CA about the adding him as CA of a particular assessee.)

3) **NOW CHARTERED ACCOUNTANT has to:-**

- a) Download the form 3CD/CB from "**Other Forms**" by logging to the Income Tax site.
[Click here](#)
- b) Fill the form and validate the same, after successful validating the form, a button for "**GENERATING THE XML FILE**" will appear and save the XML file of **form 3CD/CB**.
- c) Now login to the IT site with CA user ID and password and select the Form 3CB/CD and then upload the XML file with your **Digital Signature**.
- d) Now Prepare PDF file of the **BALANCE SHEET AND PROFIT AND LOSS ACCOUNT**, by scanning the **Audited Balance Sheet And Statement of Profit And Loss Duly Signed By The Ca And Assessee**.
- e) Upload the same.(The maximum size of the PDF documents to be loaded is given 20MB).
- f) Upload Both XML file of 3CB/CD and PDF files of the **Balance Sheet And Statement of Profit And Loss** at the same time.

4) **Then ASSESSEE has to:-**

- a) login to his account on Income Tax site with the user ID and password.
- b) Go to "**Work List**"
- c) Form 3CB/CD will appear along with the name of chartered Accountant.
- d) Assessee can view the **Form 3CB/3CD** along with **Balance Sheet And Statement of Profit And Loss**.
- e) Approve the **Audit Report** by clicking at the "**APPROVE**" with own **Digital Signatures**.
- f) **WORK LIST** now show that statement "**Successfully E-filed**".

E-filing procedure of the Form 3CB/3CD and **Statement of Profit And Loss And Balance Sheet** is completed.

Now File the ITR to complete the whole Procedure.

This is small step of mine to assist the queries of my friends and colleague.
Thanks.

Regards

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