

2

Preparing

To use the e-Tax software, you need to obtain a user identification number, etc., and install the e-Tax software beforehand.

This chapter describes how to prepare for starting the e-Tax software.

What to prepare.....	14
Check the system requirements	18
Install	19
Install electronic certificates (root certificates).....	19
Install the e-Tax software.....	22
Additionally install tax items	22
Uninstall the e-Tax software	23
Uninstall root certificates.....	25
Specify tax items and uninstall them	28

2-1

What to prepare

This section describes items to prepare before you file electronic tax returns, etc., and how to obtain them.

Before filing electronic tax returns, etc., prepare the following items:

- **User identification number and PIN**
When you perform a procedure for starting use at the Tax Office responsible for your place of tax payment, the Tax Office notifies the user himself/herself about a user identification number and PIN. A user identification number is a 16-digit number for identifying the user himself/herself.
A PIN is necessary for logging in to the reception system.
- **e-Tax Software**
You can obtain the e-Tax software from the following e-Tax website:
<https://www.e-tax.nta.go.jp/download/e-taxSoftDownload.htm>
- **Electronic certificate**
When using the e-Tax software, you need to attach an electronic signature and electronic certificate to data of a tax return, application, etc., to verify that the data of a tax return, application, etc., is created by the user himself/herself and is not falsified.
Obtain an electronic certificate from a public certification authority or civil certification authority that have a cross-certification with the Government Public Key Infrastructure (GPKI).
Specifically, obtain an electronic certificate issued by the following certification authorities:
 - (1) A commercial registration certification authority operated by the Ministry of Justice.
 - (2) A certification authority operated by a local government as a public personal certification infrastructure.
 - (3) In addition to (1) and (2), an electronic certificate that is specified by the Commissioner of National Tax Agency as having a function equivalent to certificates issued by the authorities described in (1) and (2).



Note

When you obtain the e-Tax software and root certificates from the e-Tax website, follow the procedure described in the following URL to install them:

<https://www.e-tax.nta.go.jp/download/e-taxSoftDownload.htm>

From the e-Tax website, you can obtain root certificates of the government shared certification authority (government position certification authority), government shared certification authority (government position certification authority (SHA-2)), government shared certification authority (application certification authority), and government shared certification authority (application certification authority 2) and an intermediate certificate of the government shared certification authority (application certification authority 2). Follow the procedure described in the following URL to install them:

<https://www.e-tax.nta.go.jp/download/index.htm>



Hint

The Government Public Key Infrastructure (GPKI) is a mechanism of administrative organs to verify that an application, notification, etc., is surely created by the person whose name is written on it and is not falsified when a national, etc., submitted it to an administrative organ.

Incidentally, some certification organs issue an electric certificate that is stored in an IC card. In such a case, an IC card reader/writer, etc., is additionally necessary.

When your electronic certificate is stored in an IC card, prepare a device such as an IC card reader/writer and software to use the device.

For details, consult the issuer of your electronic certificate.

- Internet connection

The e-Tax software uses the Internet to log in to the reception system, send data of a tax return, application, etc., and check reception results.

Prepare an Internet connection by yourself.

For details, refer to the following:

➔ "2-2 Check the system requirements"

Furthermore, when you want to use Internet banking, etc., for electronic tax payments or payments of delivery fees for delivery requests for electronic certificates of electronic tax payments, a contract with a financial institution for use of Internet banking, etc., is separately necessary.

To use the direct payment, you must submit a notification of use of the direct payment to the responsible Tax Office. Incidentally, you must submit a notification of use of the direct payment in writing.



When a tax accountant, etc., sends data

A tax accountant, etc., can send an electronic tax return on behalf of a taxpayer himself/herself.

When a tax accountant, etc., sends data, the following items are necessary:

- User identification number and electronic certificate of the tax accountant, etc.
- User identification number and electronic certificate of the taxpayer himself/herself

You can obtain the user identification number of the taxpayer himself/herself using the e-Tax software.

➔ Page 16 "In order for a tax accountant, etc., to obtain a user identification number of a taxpayer himself/herself"

(Continued on next page)



(Continued from previous page)

Also, when all the following conditions are satisfied, an electronic certificate of a taxpayer himself/herself is not necessary:

- Tax accountant information is entered into fields of the basic information such as the user identification number of the tax accountant, etc.
- The tax accountant, etc., attaches an electronic signature to a tax return, application, etc.
- The tax accountant, etc., sends data of a tax return, application, etc.

However, when you perform a procedure for delivery of certificates of tax payment, an electronic certificate of the taxpayer himself/herself is required.



In order for a tax accountant, etc., to obtain a user identification number of a taxpayer himself/herself

A tax accountant, etc., can obtain a user identification number of a taxpayer himself/herself as a proxy. Follow the procedure below to obtain a user identification number of a taxpayer himself/herself:

1. Create a tax return, application, etc., adding a statement concerned using the following procedure type and tax item.

Procedure type	Application/notification
Tax item	Notification of start

(Continued on next page)



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For details, refer to the following:

➔ "6 Creating Tax Returns, Applications, Etc."

2. Edit the statement.

For details on how to create statements, refer to the following:

➔ "7 Creating Statements"

3. Attach an electronic signature.

For details on how to attach an electronic signature, refer to the following:

➔ "9 Attaching an Electronic Signature to Tax Returns, Applications, Etc."

4. Send it to the place of submission of the taxpayer himself/herself.

For details on how to send, refer to the following:

➔ "10 Sending Tax Returns, Applications, Etc."

5. Access the message box, select the reception result in the message list, and then display details.

For details on how to check reception results, refer to the following:

➔ "11-1 Check details of messages"

6. Click [Display notice] in the "Message details" screen.

The details of the notice are displayed.

7. Obtain the user identification number and PIN displayed on the screen.



Note

When you selected "Do not display on notices" when creating the notification of start, the PIN is not displayed on notices.

2-2

Check the system requirements

Check the system requirements for filing an electronic tax return, making a tax payment, etc.

The e-Tax software assumes that the user's computer and e-Tax (reception system) transfer data of tax returns, applications, etc., via the Internet.

Therefore, to use the e-Tax software, an Internet connection is required including a contract with an Internet service provider.

Also, to use e-Tax, as for the e-Tax software, we recommend the following system in terms of hardware, operating system (OS), and web browser. The recommended system is a computer system on which National Tax Agency has verified the operation of the software.

Hardware	CPU: Pentium 4 (1.6 GHz) or higher (or equivalent) Memory: 512 MB or more Hard disk drive (HDD): 2 GB or more of available space Display resolution: 1024 × 768 or higher	
OS	Browser	PDF viewer
Microsoft Windows 7	Microsoft Internet Explorer 11	Adobe Reader XI Adobe Reader DC
Microsoft Windows 8.1		
Microsoft Windows 10		

* Any systems (including OS, etc., for which the support has been ended) other than shown above are not recommended and may not be usable.

* Use a 32-bit version of a web browser.

* Use a Japanese version of an OS.

* Administrator privileges are required to perform installation, uninstallation, and version upgrade.

* When you are using Microsoft Windows 8.1, use it in the "Desktop mode" (Modern UI cannot be used).

* When you are using Windows 10, use Microsoft Internet Explorer 11 (Microsoft Edge cannot be used).

2-3

Install

Install the e-Tax software.

To install the e-Tax software and root certificates, follow the procedures described in the following URLs:

<https://www.e-tax.nta.go.jp/download/e-taxSoftDownLoad.htm>

<https://www.e-tax.nta.go.jp/download/index.htm>



Install electronic certificates (root certificates)

Install electronic certificates (root certificates) issued by the following certification authorities on the computer before installing the e-Tax software:

- Government shared certification authority (government position certification authority)
- Government shared certification authority (application certification authority 2)

Agree that National Tax Agency specifies the two certification authorities shown above as trusted certification authorities, and then install electronic certificates (root certificates).

For details on root certificates, refer to the following:

➔  "1-4 About the security of e-Tax"

Now, follow the procedure described in the following URL to install root certificates:

<http://www.e-tax.nta.go.jp/manual/index.htm>

By the procedure, electronic certificates (root certificates) are installed for all users (multiple different users) who use the computer.



If a problem has arisen, a message "Failed to store certificates. Conduct manually." appears.

Note Follow the procedure below to install.

Root Certificates Installation Manual (Another Procedure)

http://www.e-tax.nta.go.jp/manual/anotherManual_vista.pdf



Hint

You can check if the root certificates are correctly installed.

Refer to the following:

➔  Page 21 "How to check if the root certificates installation is complete correctly"

For how to verify root certificates, refer to the following:

➔  "Appendix 3-1 Verify root certificates"



Install the e-Tax software.

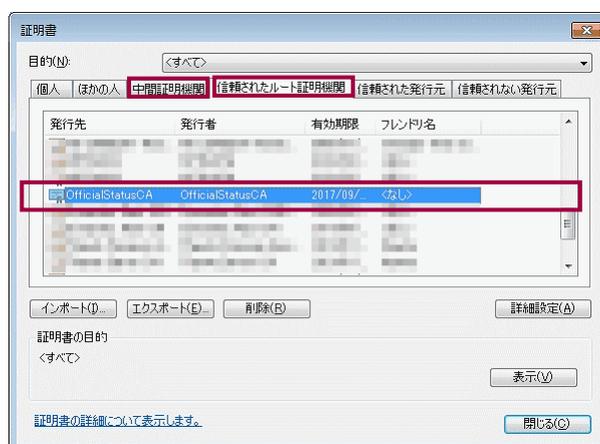
➔  Page 22 "Install the e-Tax software"



How to check if the root certificates installation is complete correctly

You can check using a browser.

1. Start a browser.
2. From the menu bar, select [Tools] - [Internet Options].
→The "Internet Options" screen will appear.
3. Select the "Content" tab, and then click [Certificates].
→The "Certificates" screen will appear.
4. Select the "Trusted Root Certification Authorities" tab and "Intermediate Certification Authorities" tab.



(The image shows the screen in which the "Trusted Root Certification Authorities" tab is selected.)

5. In each tab, make sure that there are the certificates of the following issuers:
 - "Trusted Root Certification Authorities" tab
 - OfficialStatusCA(Root certificate of the government shared certification authority (government position certification authority))
 - OfficialStatusCA (Root certificate of the government shared certification authority (government position certification authority (SHA-2)))
 - ApplicationCA2 Root(Root certificate of the government shared certification authority (application certification authority 2))
 - "Intermediate Certification Authorities" tab
 - ApplicationCA2 Sub(Intermediate certificate of the government shared certification authority (application certification authority 2))



Note

From the e-Tax website, you can obtain root certificates of the government shared certification authority (government position certification authority), government shared certification authority (government position certification authority (SHA-2)), and government shared certification authority (application certification authority 2) and an intermediate certificate of the government shared certification authority (application certification authority 2). Follow the procedure described in the following URL to install them:

<https://www.e-tax.nta.go.jp/download/index.htm>



Install the e-Tax software

After the root certificates installation is correctly complete, install the e-Tax software. Follow the procedure below to install:

<https://www.e-tax.nta.go.jp/download/e-taxSoftDownLoad.htm>

Additionally install tax items

After installing the e-Tax software, add tax items from the download site. Follow the procedure below to add tax items.

Also, when a long time has passed since you installed the e-Tax software, a software upgrade may be available. In such a case, additionally install from the download site as necessary.

➡  "Appendix 2-4 Additionally install"

Uninstall the e-Tax software

If the installed e-Tax software becomes unnecessary, uninstall it.



You can also uninstall specific tax items only.

For details, refer to the following:

Hint

➔ Page 28 "Specify tax items and uninstall them"

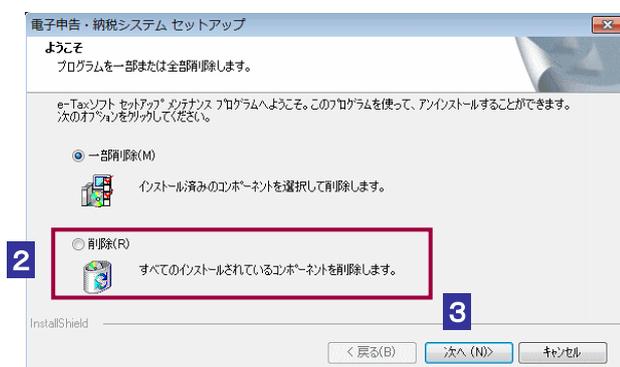
1 <For Windows 7> From the [Start] menu of Windows, select [All Programs] - [e-Tax software] - [Uninstall e-Tax software].

<For Windows 8.1> From the [Start] menu of Windows, select [Apps] - [Uninstall e-Tax software].

<For Windows 10> From the [Start] menu of Windows, select [All apps] - [e-Tax software] - [Uninstall e-Tax software].

The installer will start.

2 Select "Remove"



3 Click [Next >].

A message will appear.

4 Click [Yes].



The uninstallation will start.

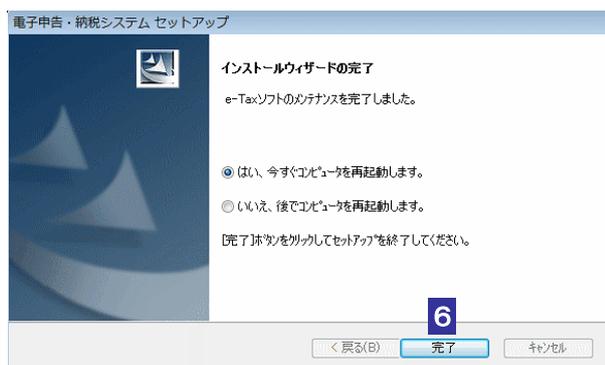
During the uninstallation, the following message will appear. Select whether or not to remove the "Adam-Entry" product.

Incidentally, since the "Adam-Entry" product may be shared with other software, we recommend that you do not remove it.



5 Click [No].

After the uninstallation is complete, the following screen will appear.



6 Click [Finish].

Now the uninstallation of the e-Tax software is complete.



Note

Created user files are not deleted even when you uninstall the e-Tax software.

If you want to delete the user files, delete them by yourself.

Root certificates are not deleted even when you uninstall the e-Tax software.

Refer to the following to delete them as necessary:

➔ Page 25 "Uninstall root certificates"

If you want to remove the "Adam-Entry" product after you have uninstalled the e-Tax software, install the e-Tax software again, and then uninstall. During that uninstallation, click [Yes] in the "Do you remove the 'Adam-Entry' product?" screen.

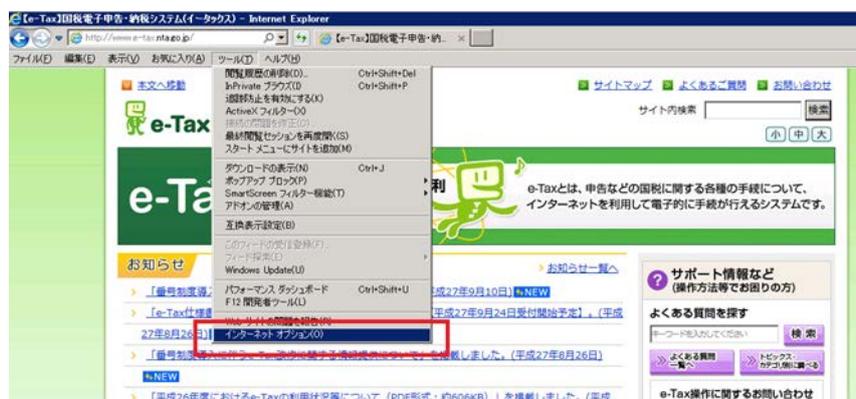
Uninstall root certificates

After uninstalling the e-Tax software, follow the procedure shown below to remove root certificates.

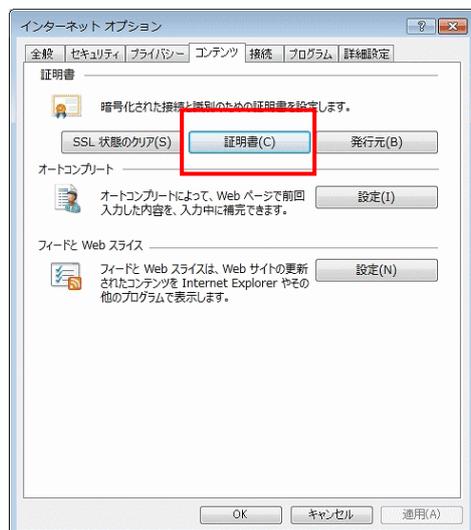
Use a browser to remove root certificates. We describes the procedure for Internet Explorer 11 as an example.

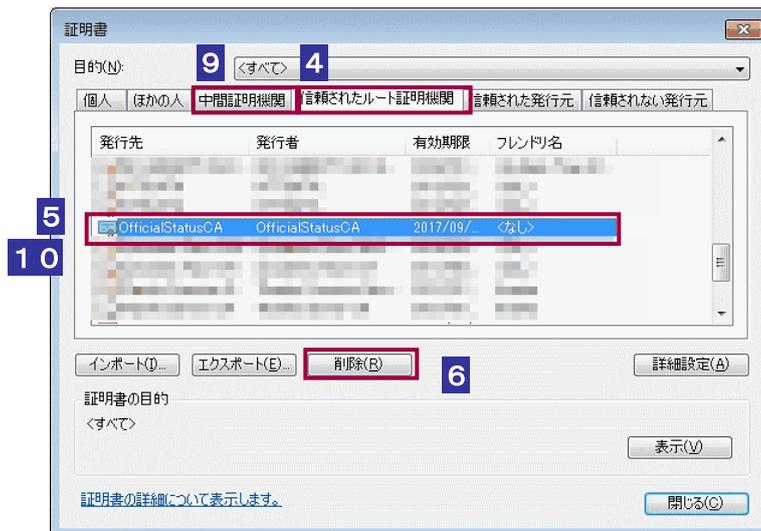
1 Start a browser.

2 From the menu bar, select [Tools] - [Internet Options].



3 Select the "Content" tab, and then click [Certificates].





4 Select the "Trusted Root Certification Authorities" tab.

5 Select certificates issued by the following issuers:

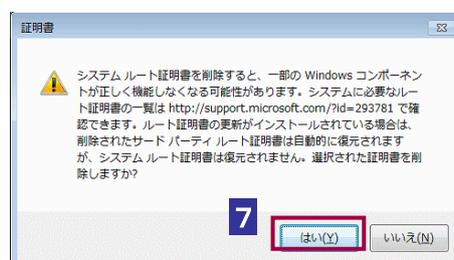
- OfficialStatusCA(Root certificate of the government shared certification authority (government position certification authority))
- OfficialStatusCA(Root certificate of the government shared certification authority (government position certification authority (SHA-2)))
- ApplicationCA2 Root (Root certificate of the government shared certification authority (application certification authority 2))

For certificates of the issuers above, perform steps **6** to **8** .

6 Click [Remove] .

A confirmation message will appear.

7 Click [Yes] .



8 Click [Yes] .

(This screen is for "OfficialStatusCA.")

The certificates you selected will be removed from "Trusted Root Certification Authorities".

Now the root certificates uninstallation is complete.

9 Select the "Intermediate Certification Authorities" tab.**10** Select certificates issued by the following issuer:

- ApplicationCA2 Sub(Intermediate certificate of the government shared certification authority (application certification authority 2))

For certificates of the issuer above, perform steps **6** to **8** .

**Note**

The Remove button may be dimmed and not available for you to use. In such a case, from the [Start] menu of Windows, select [Start Search] (for Windows Vista) or [Search programs and files] (for Windows 7), enter "certmgr.msc", and then press the [Enter] key. For Windows 8.1 and Windows 10, select the [Start] menu screen, enter "certmgr.msc", and then press the [Enter] key.

The window of certificates will appear. Select a certificate you want to remove, right-click it, and then select [Delete].

Incidentally, if you are using Microsoft Windows Vista, the "User Account Control" execution confirmation screen may appear during the process. In such a case, click [Continue] (or [Allow] depending on the displayed screen) to continue the process.

Specify tax items and uninstall them

If the installed tax items become unnecessary, remove them and their statement files.

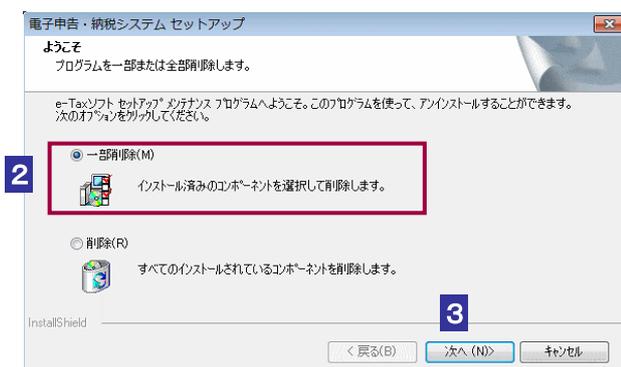
1 <For Windows 7> From the [Start] menu of Windows, select [All Programs] - [e-Tax software] - [Uninstall e-Tax software].

<For Windows 8.1> From the [Start] menu of Windows, select [Apps] - [Uninstall e-Tax software].

<For Windows 10> From the [Start] menu of Windows, select [All apps] - [e-Tax software] - [Uninstall e-Tax software].

The installer will start.

2 Select "Partially remove"

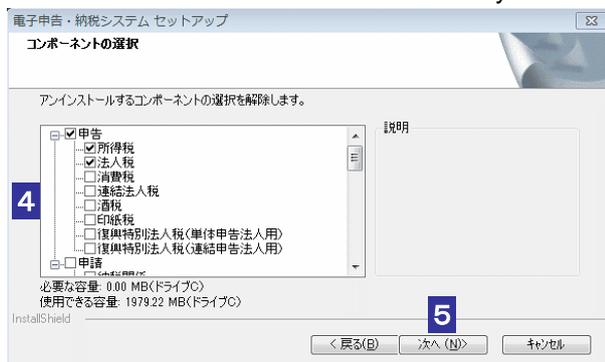


3 Click [Next >].

4 Select the tax items.

The check boxes of the installed tax items are selected.

Clear the check boxes of the tax items you want to uninstall.

**5** Click [Next >].

The selected tax items will be uninstalled and the following screen will appear.

**6** Click [Finish].

Now the tax items uninstallation is complete.