# 8

Creating Attachments

An attachment is a statement, such as a certificate evidencing the authority of tax proxy, that is sent with statements when you file a tax return, application, etc.
This chapter describes how to create attachments.

Create an attachment

When you attach statements such as a certificate evidencing the authority of tax proxy when filing a tax return, application, etc., you can edit and send them as attachments using the e-Tax software.

When it is a procedure requiring documents to be attached to statements, add (attach) the necessary attachments before sending.

Add

Attachment

Statement

Tax return, application, etc.
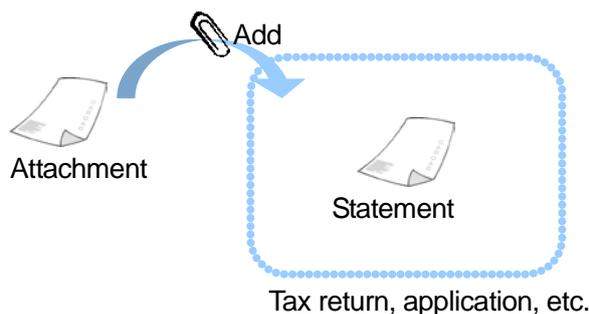
Available attachments are shown below:

- Attachment pursuant to the provision of Article 33-2, Paragraph 1 of the Certified Public Tax Accountant Law

- Attachment pursuant to the provision of Article 33-2, Paragraph 2 of the Certified Public Tax Accountant Law

- Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 27 (2015) or later)

- Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 26 (2014) or later)

- Certificate evidencing the authority of tax proxy

Among available attachments, statements that are delivered from a third party are shown below:

- Withholding slip of employment income of Heisei __

- Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)

- Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)

- Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

- Special account annual transaction report of Heisei __

- Special account annual transaction report of Heisei __ (for data from Heisei 19

(2007) onward)

- Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

- Withholding slip of retirement income/special tax collection slip of Heisei __

- Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

- Withholding slip of public pension, etc., of Heisei __

- Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)

- Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)

- Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)

- Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)

- Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)

You can import data of statements delivered from third parties and attach them to tax returns, applications, etc. However, for some certificates, etc., that cannot be attached to data of tax returns, applications, etc., such as receipts for taking a medical expenses deduction, you need to separately submit them by delivery, etc., together with a cover letter for attachments. (In some cases, you may be able to omit to submit the certificates, etc., by entering and sending the described content.)
For information on cover letters, refer to the following:

127

Extract/import an attachment

By using functions to extract an attachment as a file and import it, you can deliver attachments to a tax accountant and import attachments delivered from a tax accountant, etc., to attach them to tax returns, applications, etc.

Display the "Attachment list" screen

You manage attachments with the "Attachment list" screen.
You can display the "Attachment list" screen with one of the following procedures:

- Display from the menu button
  Select "Attachment" from "Create".

- Display from the menu bar
  Select [View] - [Attachment list].

What you can do in the "Attachment list" screen

You can perform the following operations in the "Attachment list" screen.
For a description of each operation, refer to the corresponding page.

Click to sort data in ascending/descending order of the clicked item.

添付書類一覧

添付書類一覧(L):

添付書類名   氏名又は名称   税理士等   状態   署名数
税務代理権限書   署名あり   1

The number of attached electronic signatures is displayed.

The current status of a statement is displayed. See this item to determine what to do next.

Attachments you created or imported are displayed. You can see the information of attachments.

新規作成(N)   組み込み(A)   切り出し(X)   削除(D)
帳票表示(J)   帳票編集(W)   署名(G)   署名削除(K)

Click to extract an attachment.
➡ 📖 Page 146 "Extract an attachment"」

Click to delete an attachment.

Click to create an attachment.
➡ 📖 "8-1 Create an attachment"

Click to display an attachment.
➡ 📖 "8-2 Display an attachment"

Click to import an attachment from the outside.
➡ 📖 Page 148 "Import an attachment"

Click to edit a saved attachment.
➡ 📖 Page 132 "Check/edit a saved attachment"

Click to remove electronic signatures attached to an

Click to attach an electronic signature to an attachment.
➡ 📖 "8-3 Attach an electronic signature to an attachment"

About the status of an attachment

The meanings of "Status" displayed in the "Attachment list" are shown below.

Status	Meaning
Creating	The attachment is being created.
Signable	The creation completion check has been finished successfully.
Signed	An electronic signature is attached.
Pre-signature check error	An error occurred in the pre-signature check when it is signed.
Imported	It is an imported attachment.
Imported (signed)	It is an imported attachment. (An electronic signature is attached.)

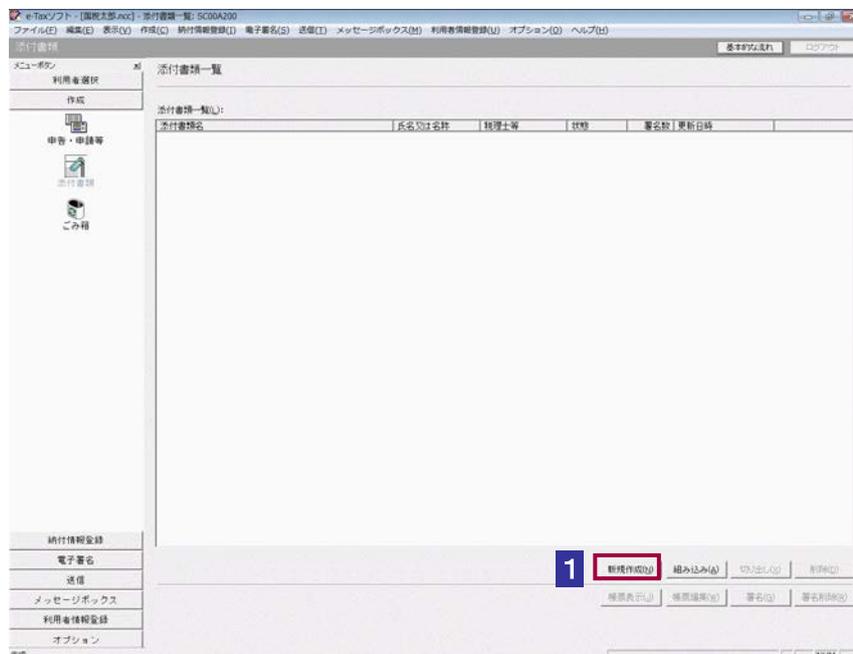Each operation is described on the following pages.

8-1

Create an attachment

Use a statement prepared in the e-Tax software to create a new attachment.

Steps

1. Click [Create].
2. Select a statement.
3. Edit.

---

1 In the "Attachment list" screen, click [Create].

2 Select an attachment you want to create from the list box.

3 Click [OK].

129

4 Edit the displayed attachment.

5 After the edit is complete, click [Finish creation].

You will return to the "Attachment list" screen and the status of the attachment will become "Signable".

Note

The following statements cannot be created:
Withholding slip of employment income of Heisei __
Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

Special account annual transaction report of Heisei __
Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)
Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

Withholding slip of retirement income/special tax collection slip of Heisei __
Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)

Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)
Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)

Hint

Although the screen name is displayed on the title bar in the format of "e-Tax software - name of the statement", it is referred to as the "Create an attachment" screen in this manual.

Click [Save] to save your edits. Your current edits will be saved.

Click [Close] to stop editing.

A message "The attachment will be saved. Are you sure?" will appear. Select a button in accordance with the situation.

When the created attachment becomes unnecessary, you can delete it.

In the "Attachment list" screen, select an attachment you want to delete, and then select [Delete].

The data you deleted is stored in the recycle bin.

Next operation

Attach an electronic signature to the attachment you created.

➡ 📖 "8-3 Attach an electronic signature to an attachment"

Check/edit a saved attachment

Check or edit a saved attachment.

Note

When you edit an attachment with electronic signatures attached, the electronic signatures will be removed.

The following statements cannot be edited. To check content of an attachment, click [Display a statement].

Withholding slip of employment income of Heisei __
Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

Special account annual transaction report of Heisei __
Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)
Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

Withholding slip of retirement income/special tax collection slip of Heisei __
Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)
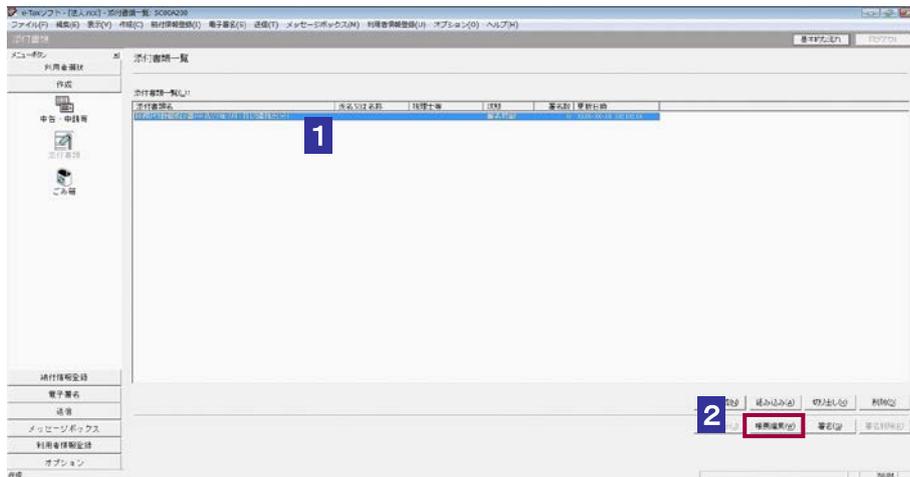
Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)
Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)
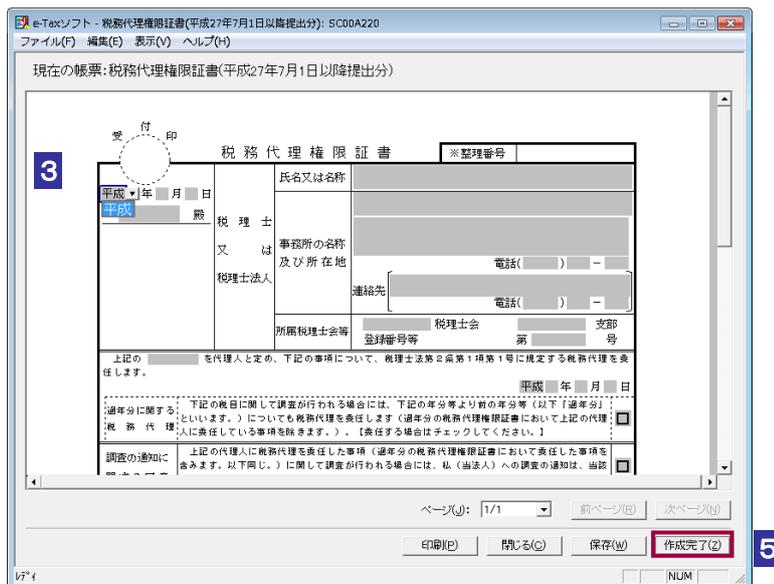
➡ 📖 "8-2 Display an attachment"

1 In the "Attachment list" screen, select an attachment you want to check or edit.

2 Click [Edit a statement].

The saved attachment will be displayed.

3 Check the document.

Hint

When you do not edit the attachment, click [Close].

A message "The attachment will be saved. Are you sure?" will appear. Select a button in accordance with the situation.

4 Edit the document as necessary.
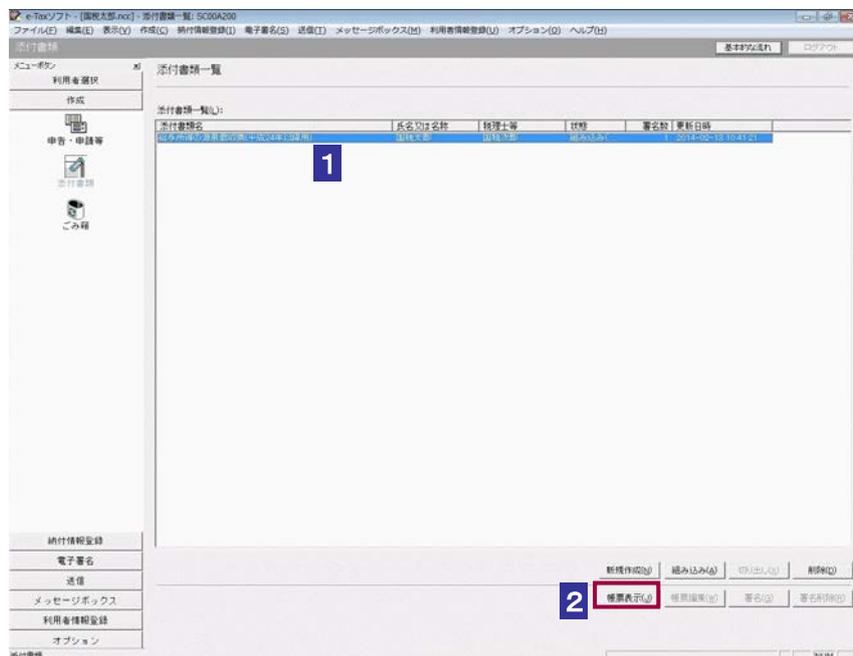
133

5 Click [Finish creation].

8-2 Display an attachment

Using a style sheet, display a withholding slip, etc., delivered from a third party.

Steps

1. Select a statement.
2. Click [Display a statement].

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1 In the "Attachment list" screen, select an attachment you want to display.

2 Click [Display a statement].

The browser will start and the attachment will be displayed.

3 Check the displayed attachment.

4 After checking, exit the browser.

⚠️ **Note** An attachment displayed in the browser cannot be edited.

To check the following attachments, click [Edit a statement] in the "Attachment list" screen:
Attachment pursuant to the provision of Article 33-2, Paragraph 1 of the Certified Public Tax Accountant Law
Attachment pursuant to the provision of Article 33-2, Paragraph 2 of the Certified Public Tax Accountant Law
Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 27 (2015) or later)
Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 26 (2014) or later)
Certificate evidencing the authority of tax proxy

Hint

To print the document displayed in the browser, use the print function of the browser.

Next operation

Add attachments to a tax return, application, etc.

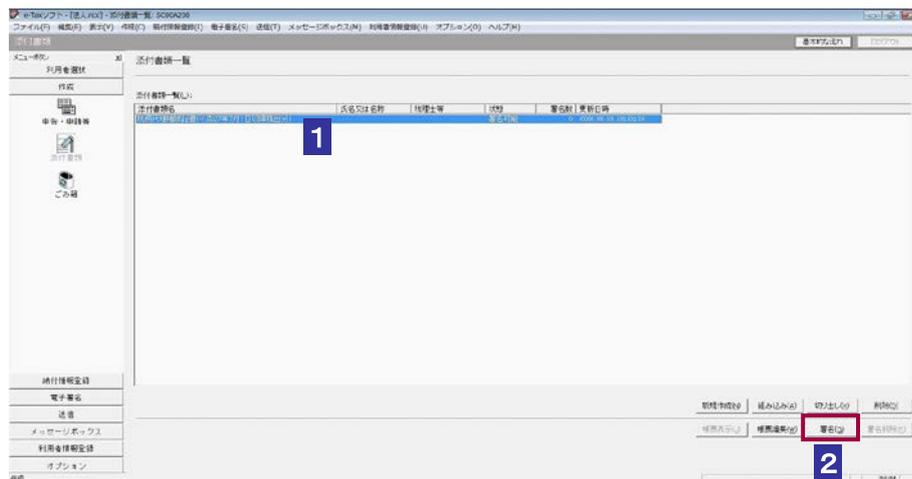➡️ 📖 "8-4 Add attachments"

8-3 Attach an electronic signature to an attachment

Attach an electronic signature to the attachment you finished creating.

Steps

1. Select an attachment.
2. Click [Sign].
3. Specify an electronic certificate.

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1 In the "Attachment list" screen, select an attachment you want to attach an electronic signature to.

2 Click [Sign].

> **Note** ⚠️ When "Schema check error" appears, take countermeasures referring to "A schema check error has occurred" in "Troubleshooting" in the operation help of the e-Tax software.
>
> An electronic signature cannot be attached to the following attachments:
> Withholding slip of employment income of Heisei __
> Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)
> Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)
> Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)
>
> Special account annual transaction report of Heisei __
> Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)
> Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)
>
> Withholding slip of retirement income/special tax collection slip of Heisei __
> Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)
>
> Withholding slip of public pension, etc., of Heisei __
> Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)
> Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)
> Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)
>
> Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)
> Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)

Specify an electronic certificate for using electronic signatures.
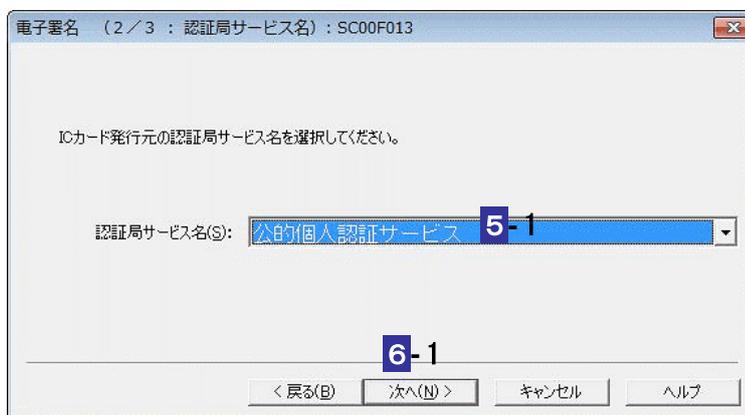Select an option button of the storage medium that contains the electronic certificate.
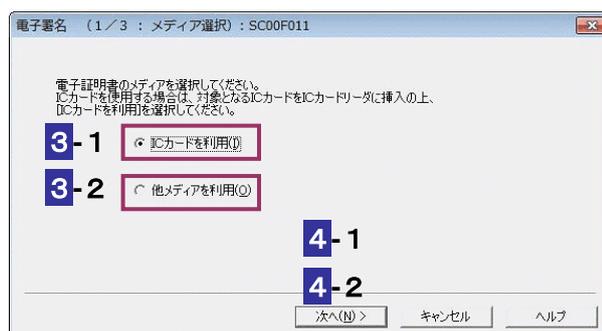
When using an IC card

3-**1** Insert the IC card into an IC card reader/writer, and then select the "Use an IC card" option button.

4-**1** Click [Next >].

5-**1** From the list box, select the certification authority service name that issued the IC card.

6-**1** Click [Next >].

7-**1** Enter the password of the IC card.

8-**1** Click [OK].

> ⚠️ **Note** The password entry screen image and the timing of its appearance vary depending on the type of the IC card.

Proceed to step **9** for the next operation.

When using another storage medium

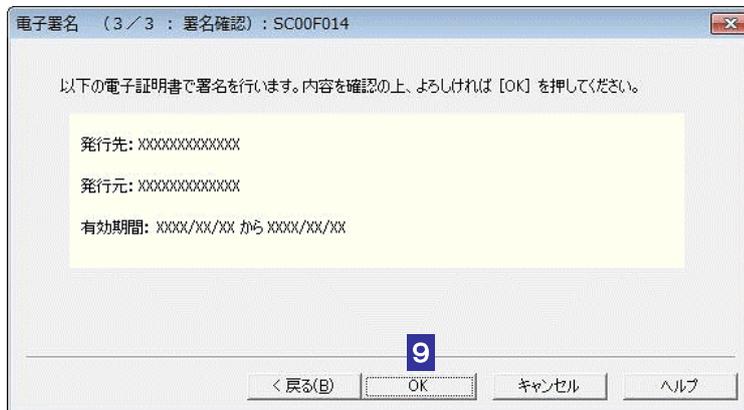**3-2** Select the "Use another storage medium" option button.

4-2 Click [Next >].

5-2 Click the [Browse…] button to specify an electric certificate to use for the electronic signature.

6-2 Enter the password of the electronic certificate.

7-2 Click [Next >].

Proceed to step **9** for the next operation.

9 Make sure that the correct electronic certificate is displayed and it is not expired, and then click [OK].

```
電子署名　（3／3 ： 署名確認）：SC00F014                          [×]

  以下の電子証明書で署名を行います。内容を確認の上、よろしければ [OK] を押してください。

    発行先: XXXXXXXXXXXXX

    発行元: XXXXXXXXXXXXX

    有効期間: XXXX/XX/XX から XXXX/XX/XX


                              9
              < 戻る(B)      OK        キャンセル      ヘルプ
```

1 0 Check the message, and then click [OK].

The electronic signature will be attached to the attachment and you will return to the "Attachment list" screen. The number of attached electronic signatures is displayed in the "Number of signatures" field.

1 1 When you used an IC card, remove it from the IC card reader/writer.

Next operation	Add attachments to a tax return, application, etc.
	➡ 📖 "8-4 Add attachments"

To sign to multiple attachments simultaneously

In the "Attachment list" screen, you can select multiple attachments by selecting attachments you want to sign while pressing the "Ctrl" key or "Shift" key.

After selecting multiple attachments, click [Sign]. The selected multiple attachments will be checked, and then they will be signed.
If a "Schema check error" appears during check, you can select whether to continue or abort the check of the remaining attachments.
Incidentally, if "Schema check error" appears, take countermeasures referring to "A schema check error has occurred" in "Troubleshooting" in the operation help of the e-Tax software.

The "Pre-signature check error list display" screen may appear when the check process is aborted or complete for all the attachments.
Incidentally, if "Pre-signature check error list display" screen appears, take countermeasures referring to "The 'Pre-signature check error list display' has appeared" in "Troubleshooting" in the operation help of the e-Tax software.
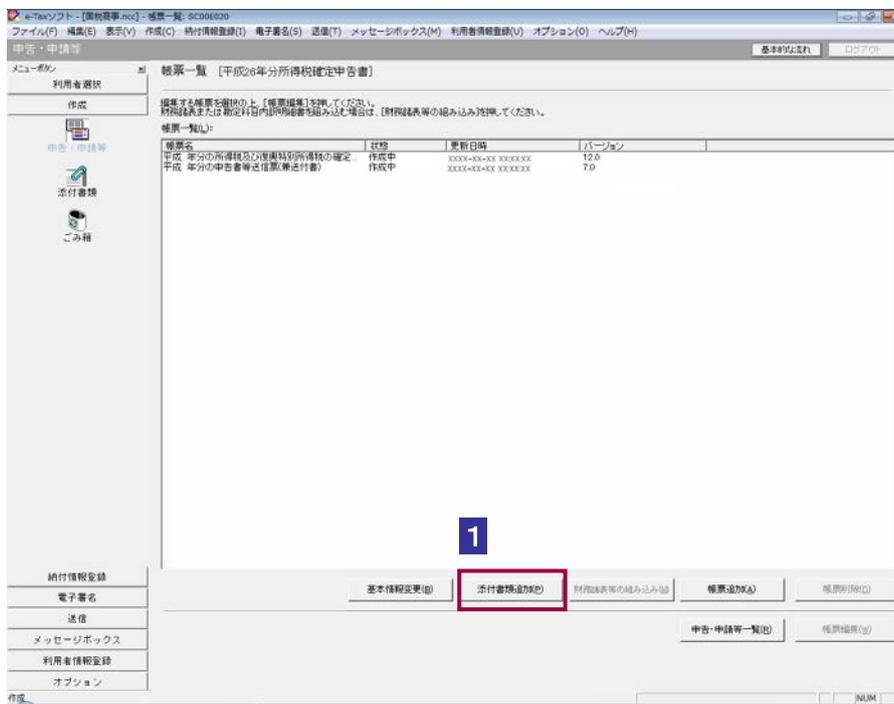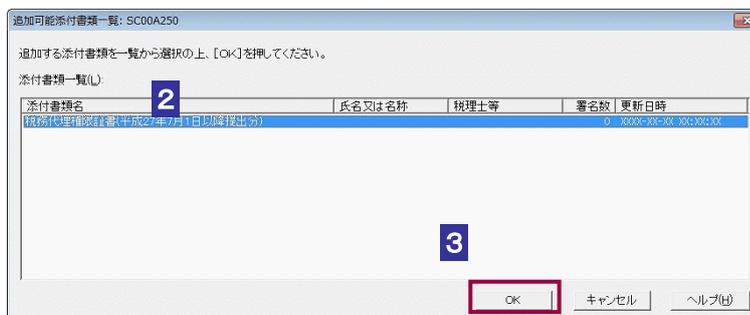
8-4 Add attachments

Add attachments as statements.

Steps

1. In the "Statement list" screen, click [Add an attachment].
2. Select an attachment.

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1 In the "Statement list" screen, click [Add an attachment].

2 In the "Attachment list" screen, select an attachment you want to add.

3 Click [OK].

You will return to the "Statement list" screen and the attachment you selected will be added to the list.

Note

In the "Statement list" screen, an attachment cannot be displayed/edited as a statement.
If there are no attachments that can be added, an error message appears. Create or import an attachment in the "Attachment list" screen, and then add again.

Hint

"Attachment" is displayed in the "Status" field of the attachment you added.

Next operation

Attach an electronic signature to the tax return, application, etc.

➡ 📖 "9-1 Attach an electronic signature to a tax return, application, etc."

8-5 Extract/import an attachment

Use the "extract" and "import" functions on an attachment.

Extract an attachment.

Extract an attachment and save it as a file.

After exporting an attachment, you can import it into another user file or import into another computer to attach to a tax return, application, etc.

1 In the "Attachment list" screen, select an attachment.

2 Click [Extract].

146
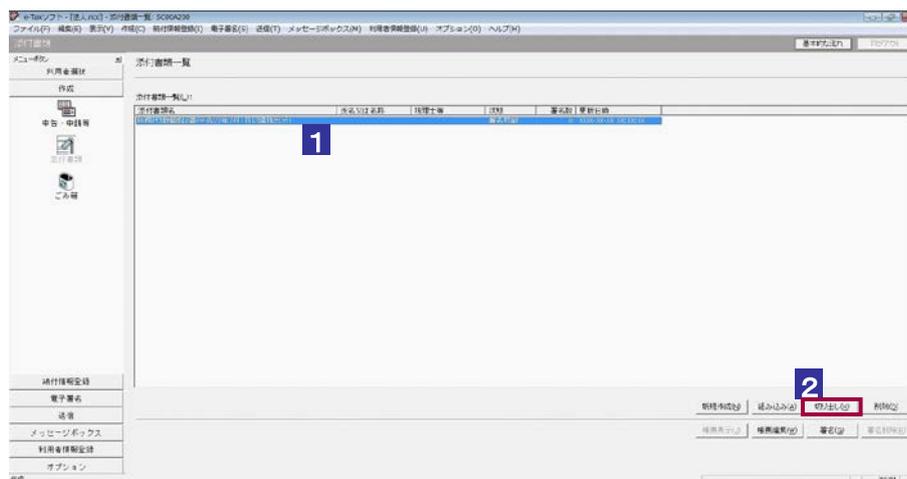
3 Specify a folder to save the extracted file, and then enter a file name.

4 Click [Save].

A data file of the attachment (with the extension .xml) will be stored into the specified save location, and you will return to the "Attachment list" screen.

Note

The following attachments cannot be extracted:
Withholding slip of employment income of Heisei __
Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

Special account annual transaction report of Heisei __
Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)
Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

Withholding slip of retirement income/special tax collection slip of Heisei __
Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)

Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)
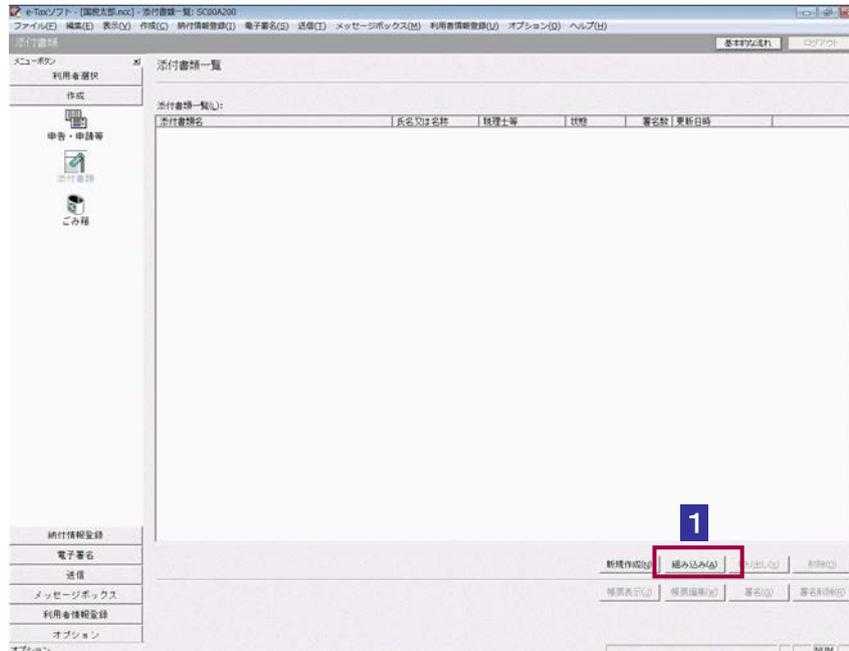Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)
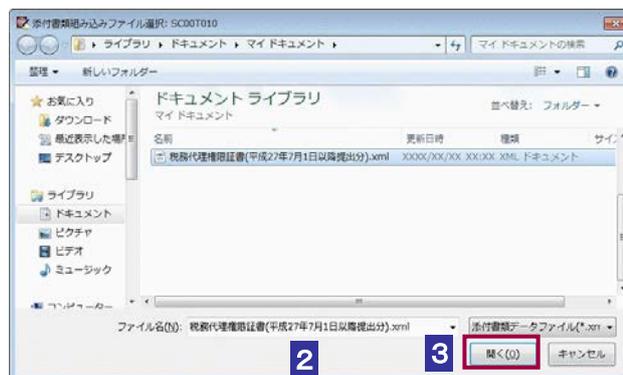
Hint

A data file of an attachment is extracted as an XML file (with the extension .xml).

Import an attachment

1 In the "Attachment list" screen, click [Import].

2 Specify the file location, and then select the file you want to import.

3 Click [Open].

You will return to the "Attachment list" screen and the attachment you imported will be displayed in the list.

⚠ **Note**

You can import the following files as attachments:

Attachment pursuant to the provision of Article 33-2, Paragraph 1 of the Certified Public Tax Accountant Law

Attachment pursuant to the provision of Article 33-2, Paragraph 2 of the Certified Public Tax Accountant Law

Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 27 (2015) or later)

Certificate evidencing the authority of tax proxy (for submission on July 1, Heisei 26 (2014) or later)

Certificate evidencing the authority of tax proxy

Withholding slip of employment income of Heisei __

Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of employment income of Heisei __ (for data from Heisei 23(2011) onward)

Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

Special account annual transaction report of Heisei __

Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)

Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

Withholding slip of retirement income/special tax collection slip of Heisei __

Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __

Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)

Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)

Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)

Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)

If there are files with the same name, the name is suffixed by a number (2), (3), ….

If you attempt to import one of the following attachments without a signature of the payer, etc., "Schema check error" will appear.

Consult the issuer of the attachment about the content of data such as presence/absence of a signature.

Hint

Withholding slip of employment income of Heisei __
Withholding slip of employment income of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of employment income of Heisei __ (for data from Heisei 24 (2012) onward)

Special account annual transaction report of Heisei __
Special account annual transaction report of Heisei __ (for data from Heisei 19 (2007) onward)
Special account annual transaction report of Heisei __ (for data from Heisei 22 (2010) onward)

Withholding slip of retirement income/special tax collection slip of Heisei __
Withholding slip of retirement income/special tax collection slip of Heisei __ (for data from Heisei 19 (2007) onward)

Withholding slip of public pension, etc., of Heisei __
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 19 (2007) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 23 (2011) onward)
Withholding slip of public pension, etc., of Heisei __ (for data from Heisei 27 (2015) onward)

Payment notice of distribution of open-ended bond investment trust revenue of Heisei __ (for data from Heisei 21 (2009) onward)
Payment notice pertaining to amount regarded as dividend, etc., of Heisei __ (for data from Heisei 21 (2009) onward)

Hint

"Imported" is displayed in the "Status" field of the imported attachment.