



What Is This Module About?

Have you ever tried to enroll in a school or apply for a job? What were the requirements that you had to accomplish? Did the school or the company ask you to fill up some forms? If you were, then you have an idea of what this module is about.

Forms are documents that you have to fill up as a requirement for admission to a school or to a job. These are important because they tell the school or company about you. There are many types of forms. For example, a bio-data is usually required when you apply for a job. Another example is a request form for a community tax certificate. We fill up this form when we secure a community tax certificate. This certificate is required for many other documents and is proof that you live in a certain locality. When you sign a contract or any legal document, a community tax certificate number is required.

This module shall teach you how to fill up important forms accurately.

At the end of this module, you should be able to fill up the following forms completely and accurately: a bio-data; an income tax return; a community tax certificate request form; a driver's license; a registration form; and election ballots.

This module is made up of three lessons:

Lesson 1 – *Filling Up Forms*

Lesson 2 – *Filling Up Other Forms*

Lesson 3 – *Accomplishing an Income Tax Return*



What Will You Learn From This Module?

After studying this module, you should be able to:

- ◆ tell why it is important to fill up forms accurately;
- ◆ identify the different parts of a form;
- ◆ follow written directions in a document; and
- ◆ fill up various forms accurately.



Let's See What You Already Know

Before studying this module, look at the following list of forms. Check the corresponding boxes beside the forms that you are already familiar with and know how to fill up.

- Bio-data
- Community tax certificate
- Income tax return
- Driver's license form
- Election ballots
- Registration forms

If you checked all the forms, then you are already familiar with the topics that will be taken up in this module. This module shall then help you to review how to fill these up completely and accurately. If you didn't then study this module carefully, it will help you fill up these forms step by step.

Filling Up Forms

Do you know what forms are? Have you seen or filled up a form before? Was it difficult?

Filling up forms is an important skill that needs to be learned. Forms often require a lot of information. Do you know what this information are about and why is it important for us to be accurate?

A form often requires a lot of information. Forms ask for information or data such as your name, address, date and place of birth, names of your parents, educational background and so on. This information must all be provided in a complete and accurate way. This is a skill that has to be learned; otherwise, you may provide wrong or incomplete information. Forms have many uses. They are used for gathering information, registration, identification and certification.

In this lesson, you will practice filling up a bio-data form.

After studying this lesson, you should be able to:

- ◆ tell why it is important to fill up forms neatly, accurately and completely;
- ◆ fill up a bio-data form; and
- ◆ identify errors when filling up forms.



Let's Try This

What forms have you filled up before?

The forms I am familiar with include the following:

1. _____
2. _____
3. _____
4. _____
5. _____

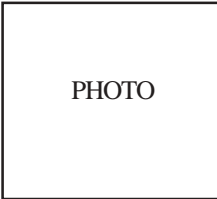
As you apply for a job or enroll in a school, you will encounter many kinds of forms. You also have to fill up forms when you do business. These are called official documents because they are proofs that information have been provided and that something has been agreed on. Study the list below of some of the important forms you need to know how to fill up.

- ◆ bio-data
- ◆ community tax certificate request form
- ◆ income tax return
- ◆ driver's license form
- ◆ election ballots
- ◆ survey form

Why do you think these forms are important?

Each form is filled up for a particular purpose. Study the blank bio-data form on the next page.

BIO-DATA



PERSONAL DATA

Position desired: _____ Date: _____
Name: _____ Sex: _____
City address: _____
Provincial address: _____
Date of birth: _____ Place: _____
Civil status: _____ Citizenship: _____
Height: _____ Weight: _____
Religion: _____ Telephone: _____
Color of hair: _____ Color of eyes: _____
Spouse: _____ Occupation: _____
Address: _____
Number of children, their names and their dates of birth: _____

Father's name: _____ Occupation: _____
Mother's name: _____ Occupation: _____
Their address: _____
Languages or dialects you can speak or write: _____
Person to be notified in case of emergency: _____
His/Her address and telephone: _____

EDUCATIONAL BACKGROUND

Elementary: _____ Date graduated: _____
High school: _____ Date graduated: _____
Vocational: _____ Date graduated: _____
College: _____ Date graduated: _____
Course: _____
Special skills: _____

EMPLOYMENT RECORD (From present work backward)

FROM	TO	POSITION	COMPANY
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CHARACTER REFERENCES

(Not related to you)

Name	Occupation	Address
_____	_____	_____
_____	_____	_____
_____	_____	_____

Res. Cert. No. A _____
Issued at _____
Issued on _____
T.I.N. _____
N.B.I. No. _____

Passport No. _____
Place of issue _____ Date _____
Applicant's signature _____

What types of information are required in a bio-data? List them down below.

The information required in a bio-data include:

- | | |
|----------|-----------|
| 1. _____ | 9. _____ |
| 2. _____ | 10. _____ |
| 3. _____ | 11. _____ |
| 4. _____ | 12. _____ |
| 5. _____ | 13. _____ |
| 6. _____ | 14. _____ |
| 7. _____ | 15. _____ |
| 8. _____ | |

Compare your list with the one in the *Answer Key* on page 38. Did you get the correct answers?

What did you learn from this activity? You just learned that a form requires a lot of information. The good news is that you know most of these because they are about you.

All forms must be filled up correctly, completely and neatly.

Generally, the importance of a form depends on its type. The word **bio-data** comes from two words, *bio* meaning “life,” and *data* meaning information. It provides a school or company important information about a person. All the information required tell the people you are dealing with — the school or company — about you and your experiences. This information will be used to evaluate whether you are qualified for a job or eligible for enrollment in a school. See how important it is to fill up forms accurately, completely and neatly?

Aside from a bio-data, there are many other forms that you need to learn how to fill up. Some of these forms shall be discussed in the next two lessons.



Let's Study and Analyze

Gani wanted to apply as a security guard. He went to the Mabuhay Security Company where he was requested to submit his bio-data. He bought a bio-data form from a bookstore. He filled up the form and submitted it to the company for evaluation.

BIO-DATA		PHOTO
PERSONAL DATA		
Position desired: <u>Isagani dela Cruz</u>	Date: <u>March 23, 2001</u>	
Name: _____	Sex: <u>Male</u>	
City address: <u>Dafaran st. Makati</u>		
Provincial address: _____		
Date of birth: <u>March 29, 1974</u>	Place: _____	
Civil status: <u>5 feet 6 inches</u>	Citizenship: <u>Philippine Filipino</u>	
Height: _____	Weight: _____	
Religion: <u>Catholic</u>	Telephone: <u>5002442</u>	
Color of hair: <u>black</u>	Color of eyes: <u>Brown</u>	
Spouse: <u>None</u>	Occupation: _____	
Address: _____		
Number of children, their names and their dates of birth: _____		

Above is a part of Gani's bio-data. Read it carefully. Do you think it will give a good impression of Gani? Why/Why not?

Based on Gani's bio-data, will you hire him? Why/Why not?

Compare your answers with those in the *Answer Key* on page 38.

Look at the way Gani's bio-data form was filled up. Notice that Gani may not be accepted for the job he applied for. He made a lot of mistakes in his bio-data and therefore might not create a very good impression.

A bio-data has to be filled up completely, accurately and neatly because it tends to give a school or company an impression of you. To create a good impression therefore, you must learn to fill up a bio-data properly.

Study Gani's bio-data again.

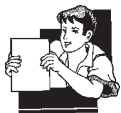
Do you think Gani can improve it?

The parts of a bio-data are listed below. Check the corresponding boxes of the items Gani filled up properly and cross out those he did not.

Personal Data

- Position desired
- Date
- Name
- Sex
- City address
- Provincial address
- Date of birth
- Place
- Civil status
- Citizenship
- Height
- Weight
- Religion
- Telephone number
- Color of hair
- Color of eyes
- Spouse
- Occupation
- Address
- Number of children, their names and their dates of birth

Compare your answers with those in the *Answer Key* on page 39. How well did you do?



Let's Learn

Let us discuss the parts of a bio-data in detail. Some reminders on how to fill up each item are given. Let's see how well you understand and follow directions. Make-believe you are filling up a bio-data.

Are you ready? Let's start.

Personal Data

- ◆ **Position desired**—refers to the position you are applying for. For example, security guard, secretary, receptionist, factory worker, etc. If there is a code for the position, place it beside the position title. A company usually provides codes for its positions.
- ◆ **Date**—refers to the date when you filled up the bio-data. Make sure you indicate the following: month, day and year. For example, March 11, 2001.
- ◆ **Name**—is perhaps the most important information in any form and refers to your complete name including your first name, middle name and family name. For example, Gani Callos de Jesus.
- ◆ **Sex**—refers your gender, that is, either male or female.
- ◆ **City address**—refers to where you are staying in the city while looking for a job. Make sure to include the number of your house, street, village, barangay or municipality, city or province. Indicate your zip code too for ease in correspondence. For example, 65 Cornell Street, Wackwack Village, Mandaluyong City 1555.
- ◆ **Provincial address**—refers to your address in the province where you originally came from. Make sure you include the number of your house, street, village/barangay or municipality, city or province. Indicate your zip code too. For example, 10 Matiyaga Street, Barangay Kabo, Maryville Village, Batangas City 4200.

If you do not have a provincial address, you can write N/A which stands “not applicable.”

- ◆ **Date of birth**—refers to the date when you were born. Make sure you include the month, day and year of your birth. For example, October 5, 1962.
- ◆ **Place of birth**—refers to where you were born; the city or municipality of your birth will do. For example, Manila or Calatagan, Batangas.
- ◆ **Civil status**—indicates whether you are married, single or a widow/widower.

- ◆ **Citizenship**—refers to your nationality. For example, Filipino, American, Indonesian, etc.
- ◆ **Height**—may be expressed in either feet and inches or centimeters. For example, if you are 5 feet and 6 inches tall, you can write either 5’6” or 165 cm.
- ◆ **Weight**—may be expressed in either pounds or kilograms. For example, if you weigh 105 pounds, you can write either 105 lbs. or 47.73 kg.
- ◆ **Religion**—refers to a cause, principle or system of beliefs you hold on to. For example, you may be a Roman Catholic, Muslim, Iglesia ni Kristo, etc.
- ◆ **Telephone**—refers to the number of your telephone line or the number where you can be contacted. For example, 433-8873. If you have more than one contact number, you may indicate all of them here.
- ◆ **Color of hair**—refers to the color of your hair when you filled up the bio-data. For example, brown or black.
- ◆ **Color of eyes**—refers to the original color of your eyes. For example, brown or black.
- ◆ **Spouse**—refers to the complete name of your spouse (husband or wife) if you are married. For example, Maria Reyes Santos. Make sure you indicate your spouse’s complete name—his/her first name, middle name and family name. You may choose not to write his/her middle name in full. In this case, you may simply indicate his/her middle initial. Write N/A if you are still single.
- ◆ **Occupation**—refers to your spouse’s job. For example, farmer, secretary, clerk, etc.
- ◆ **Address**—refers to the complete address of your spouse. Make sure you include the number of his/her house, street, village/barangay, municipality, city or province. Write his/her zip code too. For example, 22 Makabulos Street, Barangay Bangkal, Bago Bantay Village, Mandaluyong City 1555.
- ◆ **Number of children, their names and their dates of birth** — refers to the complete names of your children, their ages and their dates of birth. For example, if you have one child, Macky Callos de Jesus, 1 year old, September 24, 2000.
- ◆ **Father’s name**—refers to the complete name of your father. For example, Ernesto Martinez de Jesus. Make sure you indicate your father’s first name, middle name and family name. You may choose not to write his middle name in full. In this case, you may simply indicate his middle initial. If your father is already dead, write “deceased” after his name.
- ◆ **Occupation**—refers to your father’s job. For example, carpenter, farmer, etc. If he is not working anymore, write “retired.” Or if he does not have a job at the time you are filling up the bio-data, write “unemployed.”

- ◆ **Mother’s name**—refers to the complete name of your mother. For example, Nena Reyes Callos. Make sure you indicate your mother’s first name, middle name and family name. You may decide not to write her middle name in full. In this case, you may simply write her middle initial. If your mother is already dead, write “deceased” after her name.
- ◆ **Occupation**—refers to your mother’s job. For example, dressmaker, cook, etc.
- ◆ **Their address**—refers to your parents’ complete address — the number of their house, street, village/barangay, municipality, city or province. Write their zip code too. For example, 22 Makabulos Street, Barangay Bangkal, Bago Bantay Village, Mandaluyong City 1555.
- ◆ **Languages or dialects you can speak or write**—refers to other languages or dialects you speak or write aside from Filipino. For example, English, Ilokano, etc.
- ◆ **Person to be notified in case of emergency**—refers to the person you want to be told in case something bad happens to you. He/She may be your father, mother or spouse.
- ◆ **His/Her address and telephone**—refers to the complete address and telephone number of the person you want to be contacted in case of emergency. Make sure that you include the number of his/her house, street, village/barangay, municipality, city or province. Write his/her zip code too. For example, 22 Makabulos Street, Barangay Bangkal, Bago Bantay Village, Mandaluyong City 1555

Educational Background

- ◆ **Elementary**—refers to the complete name of the elementary school where you graduated from including its address. For example, Piñahan Elementary School — Quezon City.
- ◆ **Date graduated**—refers to the date you graduated from elementary school. The month and year will do. But if you do not recall the month, indicating the year is enough. For example, March 1976 or 1976.
- ◆ **High school**—refers to the complete name of the high school where you graduated from including its address. For example, Manila Science High School — Manila.
- ◆ **Date graduated**—refers to the date you graduated from high school. The month and year will do. But if you do not recall the month, the year is enough. For example, March 1980 or 1980.

- ◆ **College**—refers to the complete name of the college or university you graduated from including its address. For example, Far Eastern University — Manila.
- ◆ **Date graduated**—refers to the date you graduated from college. The month and year will do. But if you do not recall the month, indicating the year is enough. For example, March 1984 or 1984.
- ◆ **Course**—refers to the course you took up and finished in college. For example, “BS Secretarial” or BS Computer Science.
- ◆ **Special skills**—refers to skills such as driving, typing, etc. which will make you fit for the job you are applying for.
- ◆ **Vocational**—refers to the complete name of the vocational school you attended, if any, including its address. For example, Samson Institute of Technology—Cubao.
- ◆ **Date graduated**—refers to the date you graduated or received a certificate from the vocational school you attended. The month and year will do but if you do not remember the month, the year will do. For example, March 2000 or 2000.

Employment Record

Your employment record will show your current and previous employers, if any. In it, you should list down the names of the companies you have worked for from the most recent to the first job you ever had. The “From” column will show the date you started in a company while the “To” column shows the date you stopped working for that company. These dates may just include the month and year or just the year if you don’t remember the month. The “Position” column will show your positions in the companies you are currently working or have worked for in the past. Finally, the “Company” column will show the complete names of the companies you are currently working or have worked for in the past including their addresses. This way, the company you are applying to can keep track of your professional status, if any.

Character References

Character references are people who may tell the company to which you are applying how you are as a worker. You should indicate their complete names, positions held and complete addresses. For example, Josie L. Cruz, Supervisor, Star Paper Company, 434 Boni Avenue, Mandaluyong City.

If you have never been employed before, you may still list down character references who may be neighbors or friends. They should be able to describe you very well in terms of being an employee/a worker.

Miscellaneous

- ◆ **Residence certificate number**—a residence certificate is a form from your city/municipal hall which proves that you are a resident of a certain locality and that you have paid a certain fee for being so. Each of these forms is assigned a particular number, for example, 00563226.
- ◆ **Issued at**—indicates where the residence certificate was issued. This is usually stamped on the certificate. For example, Manila.
- ◆ **Issued on**—indicates when the residence certificate was issued. For example, March 14, 2000.
- ◆ **TIN**—indicates your tax identification number which identifies you as a taxpayer. For example, 148-605-906.
- ◆ **NBI number**—indicates your National Bureau of Investigation (NBI) number which identifies your records with the organization. For example, 41-786.
- ◆ **Passport number**—a passport can serve as a form of identification usually assigned a certain number each. For example, 205631.
- ◆ **Place of issue**—refers to the place where your passport was issued. For example, Manila, Philippines.
- ◆ **Date**—indicates when your passport was issued. For example, March 22, 1993.
- ◆ **Applicant's signature**—shows your signature to signify that you have been truthful in your application.

The following are some guidelines for filling up forms accurately.

1. Make sure that the information you are giving is complete and accurate, writing an incomplete address for example, may make it difficult for the company you are applying to to contact you by mail.
2. Check if you spelled the words and wrote the numbers correctly.
3. Write neatly and legibly. Do not use pencil. Use only blue or black ink in filling up forms. Or better yet, use a typewriter or a computer.
4. Submit forms on time. Find out when the deadlines are and comply with them.

Keep these guidelines in mind. They will help you fill up forms accurately.



Let's Review

Fill in the blanks to complete the following statements.

1. Make sure that the information you are giving is _____ and _____. Writing an incomplete address, for example, may make it difficult for the company you are applying to to contact you by mail.
2. Check if you _____ the words and _____ the numbers correctly.
3. Write _____ and _____. Do not use pencil. Use only _____ or _____ ink in filling up forms. Or better yet, use a _____ or a _____.
4. Submit forms on _____. Find out when the deadlines are and _____ with them.

Compare your answers with those in the *Answer Key* on page 38. Did you get all the correct answers?



Let's See What You Have Learned

Fill up the blank bio-data form on page 5. Make sure to follow all the guidelines given earlier. Be honest and sincere in filling up the form.

Afterward, compare it with the properly filled-up form in the *Answer Key* on pages 39 and 40. How well did you do?



Let's Remember

- ◆ You should follow certain guidelines when filling up forms.
- ◆ Filling up forms accurately is the first step in getting into a school or company you are interested in.

Filling Up Other Forms

In Lesson 1, you practiced how to fill up a bio-data form neatly, completely and accurately. You also learned what forms are and how important they are in your daily life. Aside from bio-datas, there are many other kinds of forms. These include community tax certificate request forms, drivers' licenses, election ballots, registration forms and survey forms.

This lesson shall tell you how important these forms are as well as how to correctly fill them up. Note that these forms generally require information that are also present in a bio-data. You may then apply what you already learned in Lesson 1.

After studying this lesson, you should be able to neatly, correctly and accurately fill up a community tax certificate request form, a driver's license, an election ballot, a registration form and a survey form.



Let's Read

Read the following and find out about the other kinds of forms we usually fill up.

Pepito is the son of farmer who just turned 18 a week ago. His father was considering teaching him how to drive so he can help deliver their produce. So, one day . . .

Father: Do you want to help me at work, Pepito?

Pepito: Of course, Father. How can I help you?

Father: See, *ih*o, my sight is not as good as it used to be. I need someone to drive for me whenever I go to the market to deliver our farm produce. So, I'm planning to teach you how to drive. But first, why don't you go to the municipal hall and get a community tax certificate, Pepito?

Pepito: Sure, Father. I'll just change and go now.

After a few months, Pepito learned how to drive and was ready to get his own driver's license. So, he went to the Land Transportation Office . . .

Pepito: Good afternoon, ma'am. I would like to apply for a driver's license. What am I supposed to do?

LTO Personnel: You just have to fill up this form here and submit all the necessary requirements.

After some months, Pepito decided he wanted to become a member of the youth organization in their town. So, he inquired from their office the following day . . .

Pepito: Excuse me, my name is Pepito de Jesus and I would like to become a member of your organization.

Youth Club Member: Oh, that is so nice to hear. Just fill up this registration form and pay the small fee and you're all set.

Pepito: Thank you. I heard a lot of good things about your club.

Youth Club Member: That's good. You might know some friends who also want to join . . .

Pepito: Yes, I might. Don't worry, I'll inform them.

Youth Club Member: Thank you and we'll see you during the orientation next week.

Soon the election period arrived. The youth organized a survey on who would make the best leaders for their town.

Pepito: Good morning, sir. We are part of the Youth in Action Organization and would like you to be part of the survey that we are conducting regarding the upcoming elections.

Community Member: Good morning to you too. So, what should I do?

Pepito: You just have to fill up this survey form then we'll be on our way.

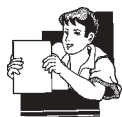
Community Member: Sure, why don't you come in and sit down while waiting for me to finish.

When election day finally arrived, Pepito was so excited to vote for the first time. He went to the precinct as early as he could . . .

Pepito: Hello, ma'am. I'm here to cast my vote.

Election Inspector: Okay, just fill up this ballot and then come to me so I can tell you what to do next.

Pepito couldn't believe a year had already passed. He learned a lot and is now more ready to take on the next years of his adult life.



Let's Learn

Do you know what a community tax certificate is for? Why do we pay a community tax anyway?

The amounts the government gets from our community taxes go into their funds for building roads, bridges and the like for the people of a certain community. A tax

certificate ensures that everyone who has it has paid his/her due and can avail of the services and structures that a local government provides.

Have you ever seen an application form for a community tax certificate before? How does it look?

If you have never seen one, look at the example shown below.

CITY OF MANILA						
Declaration under oath						
SURNAME			FIRST	MIDDLE	TAXPAYER'S IDENTIFICATION NO.	
NAME				SEX	CIVIL STATUS	
ADDRESS						
CITIZENSHIP	ICR No. (if an alien)	PLACE OF BIRTH		DATE OF BIRTH		
PROFESSION/OCCUPATION/BUSINESS		HEIGHT	WEIGHT	RESIDENCE TAX DUE		
BASIC RESIDENCE TAX DUE						
ADDITIONAL RESIDENCE TAX on the following items owned or earned in the Philippines (Tax not to exceed ₱5000.00)				TAXABLE AMOUNT		
1. Assessed value of real property (₱1.00 for every ₱1000.00)						
2. Gross receipts of earnings derived from business during the preceding year ₱1.00 for every ₱1000.00						
3. Salaries or gross receipts or earnings derived from exercise of profession or pursuit of any occupation (₱1.00 for every ₱1000.00)						
Prior res. cert. No.				TOTAL		
Date						
Place						
Taxpayer's signature						
SWORN TO and subscribed before me this						
day of, 19						
					Administering officer	

What information are usually asked for in the application form? Are they similar to those being asked for in a bio-data?

Let's see.

The same information are usually asked aside from the following:

1. **ICR number**—only needed if you are a foreigner who has made the Philippines his/her country.
2. **Residence tax due**—is dependent on whether you have a job or not and how much you actually earn plus the basic residence tax due.
3. **Basic residence tax due**—refers to the basic amount the taxpayer has to pay aside from how much he/she will be charged based on his/her earnings per year.
4. **Additional residence tax**—refers to the amount the taxpayer has to pay depending on his/her total earnings for the year.

5. **Total**—is equal to the amount identified in the residence tax due portion.
6. **Prior residence certificate number** — refers to the number of your previous residence certificate.
7. **Date** — refers to the date you got your previous residence certificate.
8. **Place** — refers to the place where you got your previous residence certificate.
9. **Taxpayer’s signature** — refers to your signature to show the authenticity of all the information written in the application form.
10. **Certification** — filled up by an administering officer in the municipal or city hall to authenticate the certificate application of the taxpayer.
11. **Administering officer** — refers to the signature of the officer who saw to the taxpayer’s application.

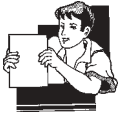


Let’s Try This

Identify the missing parts of the community tax certificate below.

CITY OF MANILA				
Declaration under oath				
NAME	SURNAME	FIRST	MIDDLE	T
	PALACIO,	MARIVIC	DIATA	7
ADDRESS 57 NEW YORK STREET, CUBAO, QUEZON CITY 1109				S F
CITIZENSHIP FILIPINO	1. _____ N/A	PLACE OF BIRTH QUEZON CITY		E F
PROFESSION/OCCUPATION/BUSINESS EDITOR		HEIGHT 5'4"	WEIGHT 100 LBS.	2 F
3. _____ P5.00				
ADDITIONAL RESIDENCE TAX on the following items owned or earned in the Philippines (Tax not to exceed P5000.00)				T A
1. Assessed value of real property (P1.00 for every P1000.00)				N
2. Gross receipts or earnings derived from business during the preceding year P1.00 for every P1000.00				N
3. Salaries or gross receipts or earnings derived from exercise of profession or pursuit of any occupation (P1.00 for every P1000.00)				F
Prior res. Cert.				4 —
No. <u>10528769</u> Date <u>Feb. 24, 2000</u> Place <u>Quezon City</u>				
5. _____				
SWORN TO and subscribed before me this <u>twenty-ft</u> day of <u>February 2001</u> .				
—				

Compare your answers with those in the *Answer Key* on page 40. How well did you do?



Let's Learn

Do you have a driver's license? Do you remember how the application form for a driver's license looks?

Refer to the blank application form for a driver's license below.

REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF TRANSPORTATION & COMMUNICATION
LAND TRANSPORTATION OFFICE
East Avenue, Quezon City

LTO FORM NO. REV. 1996
No. 2734924

DISTRICT OFFICE

INSTRUCTIONS

1. ACCOMPLISH THE FORM CORRECTLY
2. PRINT DATA LEGIBLY IN CAPITAL LETTERS
3. SUBMIT THIS FORM TO THE RECEIVING SECTION TOGETHER WITH THE REQUIRED SUPPORTING DOCUMENTS

APPLICATION FOR DRIVER'S LICENSE

NAME (Family Name, First Name, Middle Name)

PRESENT ADDRESS (No. Street, City, Municipality, Province) TEL. NO.

PREVIOUS ADDRESS (No. Street, City, Municipality, Province) TEL. NO.

CITIZENSHIP SEX (F-M) BIRTH DATE (MM/DD/YY) HEIGHT (cm.) WEIGHT (kg.)

TYPE OF APPLICATION (TOA)

A NEW E FOREIGN LIC. TO NON-PROF J CHANGE CIVIL STATUS
 B 2 YRS. DELIQUENT OR MORE F RENEWAL K CHANGE NAME
 C NON-PROF. TO PROF. G ADDITIONAL RESTRICTION CODE L CHANGE DATE OF BIRTH
 D PROF. TO NON-PROF. H DUPLICATE M OTHERS
 I CHANGE ADDRESS

TYPE OF LICENSE APPLICATION (TLA) **DRIVING SCHOOL ACQUISITION (DSA)** **EDUCATIONAL ATTAINMENT (EA)**

1 STUDENT PERMIT 1 DRIVING SCHOOL 1 NO FORMAL SCHOOLING 4 VOCATIONAL
 2 NON-PROFESSIONAL 2 LICENSED PRIVATE PERSON 2 ELEMENTARY 5 COLLEGE
 3 PROFESSIONAL 3 HIGH SCHOOL 6 POST GRADUATE
 4 CONDUCTOR

STATE THE YEAR WHEN FIRST ISSUED A PHILIPPINE DRIVER'S LICENSE

CIVIL STATUS (CS) **HAIR** **EYES** **BUILT** **COMPLEXION**

1 SINGLE 1 BLACK 4 GRAY 1 BLACK 1 LIGHT 1 LIGHT
 2 MARRIED 2 BROWN 5 OTHERS (Specify) 2 BROWN 2 MED-UM 2 FAIR
 3 WIDOWER 3 BLONDE 3 GRAY 3 HEAVY 3 DARK
 4 SEPARATED 4 OTHERS (Specify)

BIRTH PLACE (City, Municipality, Province)

SPOUSE NAME (Maiden, Last Name, Family Name) indicate even if deceased

FATHER'S NAME (Family Name, First Name, MI) indicate even if deceased

MOTHER'S MAIDEN NAME (Family Name, First Name, MI) indicate even if deceased

EMPLOYER'S/BUSINESS NAME TEL. NO.

EMPLOYER'S/BUSINESS ADDRESS

FILL THIS UP, IF YOU HAVE CHANGED YOUR ADDRESS PREVIOUS ADDRESS

FILL THIS UP ONLY IF YOUR NAME ABOVE IS DIFFERENT FROM YOUR NAME IN PREVIOUS LICENSE PREVIOUS NAME (Family Name, First Name, Middle Name) VALIDITY

PREVIOUS OFFICIAL RECEIPT DLR NO. DATE ISSUED AMOUNT PAID

THIS IS TO CERTIFY THAT I HAVE CAREFULLY EVALUATED THIS APPLICATION INCLUDING THE SUPPORTING DOCUMENTS

CONDITIONS

A WEARING CORRECTIVE LENSES.
 B DRIVE ONLY W/ SPECIAL EQUIPMENT FOR UPPER LIMBS.
 C DRIVE ONLY W/ SPECIAL EQUIPMENT FOR LOWER LIMBS.
 D DAYLIGHT DRIVING ONLY.
 E ACCOMPANIED BY A PERSON W/ NORMAL HEARING.

COMPUTATION OF FEES

COMPUTATION OF FEES	AMOUNT
APPLICATION FEE	₱
LICENSE FEE	
ADDITIONAL RESTRICTION CODE	
CHANGE ADDRESS	
REVISION OF RECORDS	
OTHERS (SPECIFY)	
TOTAL	₱

A) Have you ever been charged or convicted of any offense (criminal, civil) before a court of competent jurisdiction? YES NO

If "YES", give particulars: _____

Any false statement in this application or misrepresentation of facts relative thereto shall render the license null and void ab initio and shall serve as ground to bar from acquiring license.

THIS IS TO CERTIFY THAT THE INFORMATION I HAVE GIVEN IS TRUE AND CORRECT.

SIGNATURE OF LICENSER _____

SUBSCRIBED under oath before me _____
District Head / Date _____

What information not in the two previous forms we have discussed are included here?

Let's take a look at them in detail.

1. **Previous address**—refers to your address apart from the present one if, for example, you moved from one place to another.

2. **Telephone number**—refers to your telephone number in your previous address, if any.
3. **Type of application**—refers to what type of application you are filing for: new, two years delinquent or more, nonprofessional to professional, professional to nonprofessional, foreign license to nonprofessional, renewal, additional restriction code, duplicate, change address, change civil status, change name, change date of birth or others.
4. **Type of license applied for**—whether you are applying for a student permit, nonprofessional, professional or conductor.
5. **Driving skill acquired or will be acquired thru**—refers to whether you will acquire your driving skill through a driving school or a licensed private person.
6. **Year when first issued a Philippine driver's license**—indicates when you first got your Philippine driver's license.
7. **Organ donor**—indicates whether you are an organ donor or not.
8. **Built**—indicates whether you are of light, medium or heavy built.
9. **Complexion**—indicates whether you are light, fair or dark in complexion.
10. **Previous name**—only filled up when you have had your name changed.
11. **Validity**—refers to the date when your new name has been approved for use.
12. **Previous official receipt number**—refers to the receipt number of your payment for your previous license.
13. **Date issued**—refers to the date when the receipt for your previous license was released.
14. **Amount paid**—refers to the amount you paid for your previous license.
15. **Previous conviction for a criminal/civil crime**—indicates whether you have been previously convicted of any crime at all or not.
16. **Signature of licensee**—proves that all the information contained in your application are true and accurate.
17. **Restriction code**—filled up by a Land Transportation Office personnel and indicates what types of vehicles you are only allowed to drive.
18. **Conditions**—indicates under what special conditions are you only allowed to drive.
19. **Computation of fees**—indicates all the fees you have to pay to get your driver's license.
20. **District head/Date**—shows the signature of the head of the office and the date on which he/she signed your application for processing.



Let's Try This

Match the items in Column A with their descriptions in Column B. Write the letters of the correct answers only in the blanks provided.

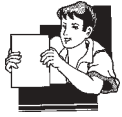
Column A

- _____ 1. Type of application
- _____ 2. Type of license applied for
- _____ 3. Driving skill acquired or will be acquired thru
- _____ 4. Restriction code
- _____ 5. Conditions

Column B

- a. Indicates under what special conditions are you only allowed to drive
- b. Can be any of the following: new, two years delinquent or more, nonprofessional to professional, etc.
- c. Indicates what types of vehicles you are only allowed to drive
- d. Can be any of the following: student permit, nonprofessional, professional or conductor
- e. Can be either through a driving school or a licensed private person

Compare your answers with those in the *Answer Key* on page 40. How well did you do?



Let's Learn

Have you ever participated in an election before? If you have, then you know how a ballot looks. If you haven't, then look at a blank ballot below to know how it looks.

005769821

PRESIDENT _____

VICE-PRESIDENT _____

SENATORS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____

GOVERNOR _____

MAYOR _____

VICE-MAYOR _____

COUNCILORS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Voter's
thumb-
mark

005769821

An election ballot is very easy to fill up. You just have to remember the names of the candidates that you will vote for. Then just follow the instructions the election inspector will give you.



Let's Try This

Among the candidates in the 2001 elections, who did or would you most likely vote for? List them down in the blank ballot given in *Let's Learn* found on page 22.

Did any of your choices win?

Filing up registration and survey forms are similar to how we fill up all the other kinds of forms we have already studied. Just be honest with all your answers to the given questions.



Let's See What You Have Learned

Fill up the following school registration form.

UP FORM 5. UNIVERSITY OF THE PHILIPPINES CERTIFICATE OF REGISTRATION (REV. 09-99)											
WRITE IN BLOCK LETTERS: Use an "X" mark in answering information preceded by a box <input type="checkbox"/>											
STUDENT NUMBER		NAME (Last, Given, Middle, if a married woman, encircle maiden name)							DEGREE & MAJOR		TERM & SY.
STUDENT'S COPY	CLASS CODE	COURSE NO.	SECTION	UNITS	DAYS	TIME	ROOM	LAB. FEE	CODE	Tuition	
										Miscellaneous	
										Student Fund	
										Laboratory Fee	
										EDF	
										Entrance	
										Deposit	
										Fine	
										TOTAL FEES	
										Less: Scholarship/Privilege	
									AMOUNT PAYABLE		
			TOTAL UNITS	Country of Citizenship			Amount Received by:			Assessed by:	
Signature and Printed Name of Adviser			STFAP Bracket No. Certified by:			CASH:			Scholarship / Privilege		
Signature of Student			First Time to enroll in UP?			CHECK:					
						LOAN:					
						O. R. No.			Date	Amount Paid	

Compare your work with the sample filled-up school registration form in the *Answer Key* on page 41. How well did you do?



Let's Remember

- ◆ Different kinds of forms require different kinds of information. But all these have something to do with whatever the form you are filling up is for. If, for example, you are applying for a driver's license, the information that the form asks for have something to do with your driving skill.

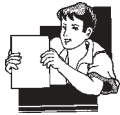
Accomplishing an Income Tax Return

In the previous lessons, you learned how to fill up different kinds of forms such as a bio-data, an application for a community tax certificate and a driver's license, an election ballot, a survey form and a registration form. These forms are relatively easy to fill up since they require simple information.

To further develop your skill in filling up forms accurately, you shall now learn how to accomplish an income tax return.

After studying this lesson, you should be able to:

- ◆ describe how an income tax return looks; and
- ◆ fill up an income tax return accurately.



Let's Learn

Every good citizen files an income tax return every year. Do you know how to accomplish an income tax return properly? Don't worry if you don't just read this lesson carefully to find out how.


The **income tax return (ITR)** is proof of payment for your annual income tax. People who are working, like your parents, fill up this form. An ITR provides information about your income and the amount of tax you need to pay every year. It can also prove your capacity to pay for your credit card or other bills. It may also be required when applying for a visa when you go abroad or for a loan.



Let's Study and Analyze

Nena is the owner of a small *sari-sari* store. She accomplished the following income tax return. Do you think she filled it up properly? Why/Why not?

DLN:

	Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas Internas	Annual Income Tax Return	BIR Form No. 1700 (Formerly Form 1701A) January 1998				
For Individuals Earning Purely Compensation Income							
Fill in all applicable spaces. Mark all appropriate boxes with an "X".							
1	For the Year	BCS Number/Item Number (To be filled up by the BIR)					
	▶ 2000						
Part I Background Information							
2	Taxpayer Identification No.	3 RDO Code	4 PSOC Code				
	▶ 452 043 133						
5	Taxpayer's Name						
	▶ CASTRO	▶ NENA	▶ AGUILAR				
	Last Name	First Name	Middle Name				
6	Registered Address						
	▶ 49 ... AGUILAR STREET						
	No. (Include Building Name)	Street	Barangay				
	▶ DILIMAN	▶ QUEZON CITY	▶ 1104				
	District/Municipality	City/Province	Zip Code				
7	<input checked="" type="checkbox"/> Home Telephone Number	<input type="checkbox"/> Office Telephone Number	7B Telephone Number				
		7A Area/Access Code					
		▶ 02	▶ 415994				
8	Date of Birth (MM/DD/YYYY)						
	▶ 12 02 1964						
9	Spouse's Taxpayer Identification No.						
	▶						
10	Spouse's RDO Code						
	▶						
11	Spouse's PSOC Code						
	▶						
12	Spouse's Name						
	▶						
	Last Name	First Name	Middle Name				
	Address of the Spouse						
	▶						
	No. (Include Building Name)	Street	Barangay				
	▶						
	District/Municipality	City/Province	Zip Code				
13	Date of Birth (MM/DD/YYYY)						
	▶						
14	Number of sheets attached		15 Is this an amended return?				
	▶		▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
16	Are you availing of tax relief under a special law?						
	▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
17	If yes, specify special law						
	▶						
Part II Details of Payment							
Particulars	Drawee Bank/Agency	Number	Date			Amount	complete? (To be filled up by the BIR)
			MM	DD	YYYY		
18 Cash/Bank Debit Memo							<input type="checkbox"/> Yes <input type="checkbox"/> No
19A Check	19B	19C					
20A Tax Debit Memo	20B	20C					
21A Others	21B	21C					

Part III Personal and Additional Exemptions

22 Personal Exemption
22A Status of Taxpayer (Mark one box only)
 22A Single/ Widow/ Widower/ Married but Legally Separated with No Qualified Dependents Head of Family Married Taxpayer
 Spouse

Personal Exemptions 22B 22C

22D Name of Qualified Dependent Other than Children	22E Date of Birth			22F Relationship
	MM	DD	YYYY	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

23 Additional Exemptions (For Married or Head of the Family) 23A 23B
 23C Number of Qualified Dependent Children

23D Name of Qualified Dependent Children	23E Date of Birth		
	MM	DD	YYYY
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

24 Total Exemptions (Sum of Items 22B & 23A/22C & 23B) 24A 24B

Part IV Computation of Tax

	25A Spouse	25B Taxpayer
25 Gross Taxable Compensation Income	<input type="text"/>	<input type="text" value="34850.50"/>
26 Less: Total Exemptions (From Item 24A/24B)	<input type="text"/>	<input type="text" value="20000.00"/>
Premium paid on health and/or hospitalization insurance not to exceed P2,400 per year. If married, for spouse claiming additional exemption.	26C <input type="text"/>	26D <input type="text"/>
Total (Sum of Items 26A & 26C/ 26B & 26D)	26E <input type="text"/>	26F <input type="text"/>
27 Taxable Compensation Income	27A <input type="text"/>	27B <input type="text" value="14850.50"/>
28 Tax Due	28A <input type="text"/>	28B <input type="text" value="985.05"/>
29 Less: Tax Credits/Payments	29A <input type="text"/>	29B <input type="text"/>
Tax Withheld Per BIR Form No. 2316	29C <input type="text"/>	29D <input type="text"/>
Foreign Tax Credits	29E <input type="text"/>	29F <input type="text"/>
Tax Paid in Return Previously Filed, if this is an amended return	<input type="text"/>	<input type="text"/>
30 Total Tax Credits/Payments (Sum of Items 29A, 29C & 29E/ Sum of Items 29B, 29D & 29F)	30A <input type="text"/>	30B <input type="text"/>
31 Tax Payable/(Overpayment)	31A <input type="text"/>	31B <input type="text"/>

Part IV Computation of Tax (continued)

	Spouse		Taxpayer	
32 Add: Penalties				
Surcharge	32A	.	32B	.
Interest	32C	.	32D	.
Compromise	32E	.	32F	.
33 Total Penalties (Sum of Items 32A, 32C & 32E/ Sum of Items 32B, 32D & 32F)	33A	.	33B	.
34 Total Amount Payable/(Overpayment) (Sum of Items 31A & 33A/ 31B & 33B)	34A	.	34B	.
35 Aggregate Amount Payable/(Overpayment) (Sum of Items 34A & 34B)	35	.		.

Details of Mode of Payment		Amount
36 Amount Paid in this Return/First Instalment	36	.
37 Amount Still Due on or before July 15	37	.

Part V Source of Compensation and Tax Withheld

Employer's TIN	Amount of Compensation	Tax Withheld
38A	38B	38C
39A	39B	39C
40A	40B	40C
41 TOTAL (Spouse).....	41A	41B
42A 813 400 428 240	42B 34850.50	42C 985.05
43A	43B	43C
44A	44B	44C
45 TOTAL (Taxpayer).....	45A	45B 985.05

I declare, under the penalties of perjury, that this return has been made in good faith, verified by me, and to the best of my knowledge and belief, is true and correct, pursuant to the provisions of the National Internal Revenue Code, as amended, and the regulations issued under authority thereof.

46 _____ 47 NEVA A. CASTRO
Authorized Agent Signature over Printed Name Taxpayer Signature over Printed Name

Community Tax Certificate Number	Place of Issue	Date Issued			Amount
		MM	DD	YYYY	
48 24683579	49 BUEZON CITY	50 02	18	1999	51 39.00

TAX TABLE

If Taxable Income Is:	Tax Due Is:
Not over P 10,000	5 %
Over P 10,000 but not over P 30,000	P 500 + 10 % of the excess over P 10,000
Over P 30,000 but not over P 70,000	P 2,500 + 15 % of the excess over P 30,000
Over P 70,000 but not over P 140,000	P 8,500 + 20 % of the excess over P 70,000
Over P 140,000 but not over P 250,000	P 22,500 + 25 % of the excess over P 140,000
Over P 250,000 but not over P 500,000	P 50,000 + 30 % of the excess over P 250,000
Over P 500,000	P 125,000 + 34 % of the excess over P 500,000

* Effective January 1, 1999, the maximum rate will be changed to 33% and 32% on January 1, 2000.

PERSONAL EXEMPTIONS	
Single/Widow/Widower/Married but legally separated with no qualified dependent	P 20,000
Head of the Family	P 25,000
For each Married Individual Deriving Income	P 32,000
ADDITIONAL PERSONAL EXEMPTIONS (for Married or Head of the family)	
For each qualified dependent child, not exceeding four (4)	P 8,000

Part I

- ◆ **For the year**—indicates the year for which the income tax return is being filed. For example, if you plan to pay your taxes for the year 1999, put “1999” in this portion.
- ◆ **Amended return**—put an 7 in the box that describes the type of income tax return you are filing. Are you paying for taxes that you failed to pay before?
- ◆ **Number of sheets attached**—depends on whether you attached sheets to the income tax return or not. If you did, then you should indicate the number of pages that you attached. For example, if you attached three pages to the form, then write “03.”
- ◆ **RDO Code** (Taxpayer’s and spouse’s)—this portion is filled up by a Bureau of Internal Revenue representative.
- ◆ **Exemption status**—one can either be single, the head of the family or married. If you are not married, put an 7 in the box before “Single.” If you are the head of the family, put an 7 before “Head of the family.” If you are married but are not the head of the family, put an 7 in the box before “Married.”
- ◆ **Number of qualified dependent children**—refers to the number of children who depend on you for support, that is, 18 years old or below. For example, if you have three children, write “3” in the box.
- ◆ **Is the wife claiming the additional exemption for qualified dependent children?**—refers to whether your wife is claiming the exemption or not.

The next items in the income tax return require doing some computations. But don’t worry, this module will teach you how to compute for the values properly. You can ask the help of the city or municipal clerk for this part if you find difficulty later.

But for now just read on and follow directions carefully.

Part II

- ◆ **Gross taxable compensation income (Taxpayer’s and spouse’s)**—refers to how much you and your spouse received as compensation for your work. Note that your and your spouse’s gross taxable compensation income should be written in separate boxes.

For example, if your monthly income is ₱5000 you must multiply that by 12 for 12 months in a year and you will get:

$$₱5000 \times 12 = ₱60000$$

- ◆ **Other taxable income (Taxpayer's and spouse's)**—refers to incomes you get from businesses or properties.
- ◆ **Gross taxable income (Taxpayer's and spouse's)**— refers to the sum of the gross taxable compensation income and other taxable income.

Gross taxable income = Gross taxable compensation income + Other taxable income

For example, if your gross taxable compensation income is ₱60000 and you earned ₱20000 more from other sources that year, then your gross taxable income will be:

$$₱60000 + 20000 = ₱80000$$

- ◆ **Less: Total personal and additional exemptions (Taxpayer's and spouse's)**—refers to exemptions given by the BIR to us. Since different people receive different exemptions, it would be wiser to ask a BIR representative about this. Paying for health or hospitalization insurance can give you additional exemptions.
- ◆ **Total (Taxpayer's and spouse's)**—refers to the total amount of exemptions.

Total = Total personal and additional exemptions + Amount or premium paid for health and hospitalization insurance

- ◆ **Taxable income (Taxpayer's and spouse's)** — refers to the difference between your gross taxable income and your exemptions
Taxable income = Gross taxable income – Exemptions
- ◆ **Tax due (Taxpayer's and spouse's)** — depends on the amount of your taxable income. The following guidelines will help you determine how much you should pay:

1. If your taxable income is over ₱10000 but less than ₱30000, you should pay ₱500 plus 10% of the amount in excess of ₱10000. For example, if your taxable income is ₱12000, then you should pay:

$$₱12000 - 10000 = ₱2000$$

$$₱2000 \times 0.10 = ₱200$$

$$₱500 + 200 = ₱700$$

2. If your taxable income is over ₱30000 but less than ₱70000, you should pay ₱2500 plus 15% of the amount in excess of ₱30000. For example, if your taxable income is ₱32000, then you should pay:

$$₱32000 - 3000 = ₱29000$$

$$₱29000 \times 0.15 = ₱4350$$

$$₱2500 + 4350 = ₱6850$$

Look at the back page of the income tax return form. There you will see a tax table which will tell you how to compute for your tax due if you have a taxable income greater than the examples given earlier.

Now, let us continue with the other items in the form.

- ◆ **Aggregate tax due** — refers to the sum of your and your spouse's tax due. For example, if your tax due is ₱700 and your spouse's is ₱400, you should get:

$$₱700 + 400 = ₱1100$$

If you are still single, you are not required to fill up this box.

- ◆ **Less: Tax credits/Payments (Taxpayer's and spouse's)** — refers to the amount which will be subtracted from your tax due. This includes the amount deducted from your salary every month. You may inquire from the city/municipal clerk regarding this.

1. **Tax withheld per BIR form no. 2316 (Taxpayer's and spouse's)** — refers to the amount of tax that is deducted from your monthly salary. Your office issues a certification of withholding tax collected every year before April, the time for paying income tax. If you do not receive such certification, just ask your finance department how much is withheld for taxes from your monthly salary. Multiply this by 12 (for the 12 months of the year) to get the total tax withheld. For example, if ₱100 is withheld from your salary every month, you should pay:

$$₱100 \times 12 = ₱1200$$

2. **Foreign tax credits (Taxpayer's and spouse's)**—only filled up if you paid taxes in another country.

- ◆ **Tax paid in return previously filed, if this is an amended return (Taxpayer's and spouse's)**—only filled up by those who are paying for their taxes on installment basis. Just indicate the amount you have already paid.

- ◆ **Total tax credits/payments (Taxpayer's and spouse's)**—refers to the total of the tax withheld + foreign tax credits + tax paid in return previously filed.

For example, if your:

Tax withheld =	₱1200
Foreign tax credits =	0
Tax paid in return previously filed =	₱800

You should then pay:

$$₱1200 + 800 = ₱2000$$

- ◆ **Tax payable (Taxpayer's and spouse's)**—refers to the difference between your tax due and your total tax credits/payments. For example, if your tax due = ₱2800 and total tax credits/payments = ₱2500, you should get:

$$₱2800 - 2500 = ₱300$$

- ◆ **Add: Penalties (Taxpayer’s and spouse’s)**—refers to the additional amount you have to pay, for example, for filing your annual income tax return late. But don’t worry, a BIR representative will take care of this.
 1. **[Add]: Surcharge (Taxpayer’s and spouse’s)**—refers to the additional amount you have to pay because you did not file your income tax return on time.
 2. **[Add]: Interest (Taxpayer’s and spouse’s)**—refers to the amount you are charged if you have not been paying your taxes for a long time, usually 20% per annum of the amount of tax you should pay.
 3. **[Add]: Compromise (Taxpayer’s and spouse’s)**—rarely charged to a person and so is not something you should worry about.
- ◆ **Total penalties (Taxpayer’s and spouse’s)**—refer to the sum of the surcharge, interest and compromise. For example, if your surcharge = ₱200, interest = ₱150 and compromise penalty = 0, you should get:

$$₱200 + 150 = ₱350$$
- ◆ **Total amount payable (Taxpayer’s and spouse’s)**—refers to the sum of the tax payable and total penalties. For example, if your tax payable = ₱300 and penalties = ₱350, you should get:

$$₱300 + 350 = ₱750$$
- ◆ **Aggregate (combined) amount payable**—refers to the sum of your and your spouse’s total amount payable. For example, if your total amount payable = ₱750 and your spouse’s total amount payable = ₱650, you should get:

$$₱750 + 650 = ₱1400$$
- ◆ **Less: Amount paid in this return/first installment**—refers to the amount of tax you plan to pay in this return.
- ◆ **Amount still due on or before July 15, if taxpayer is allowed to pay on installment**—refers to the difference between the aggregate amount payable and amount paid in this return/first installment if you decide to pay on installment. For example, if your aggregate amount payable = ₱1400 and amount paid in this return/first installment = ₱500, you will get:

$$₱1400 - 500 = ₱900$$
- ◆ **Taxpayer/Authorized agent (Signature over printed name)**—refers to your full name or the name of your authorized agent, above which is your or your authorized agent’s signature.

Part III

The items in this part should not cause you any worry because they are taken care of by BIR personnel.



Let's Review

Define the following parts of an income tax return.

1. Gross Taxable Compensation Income
2. Gross Taxable Income
3. Aggregate Tax Due
4. Total Tax Credits/Payments
5. Aggregate Amount Payable


Compare your answers with those in the *Answer Key* on page 41. How well did you do?



Let's See What You Have Learned

Fill up the blank income tax return form accurately.

DLN:

	Republika ng Pilipinas Kagawaran ng Pananalapi Kawanihan ng Rentas Internas	Annual Income Tax Return	BIR Form No. 1700 (Formerly Form 1701A) January 1998
For Individuals Earning Purely Compensation Income			
Fill in all applicable spaces. Mark all appropriate boxes with an "X".			
1 For the Year	4	BCS Number/Item Number (To be filled up by the BIR)	
Part I Background Information			
2 Taxpayer Identification No.	2	3 RDO Code	4 PSOC Code
5 Taxpayer's Name			
5 Last Name First Name Middle Name			
6 Registered Address			
6 No.(Include Building Name) Street Subdivision Barangay			
6 District/Municipality City/Province Zip Code			
7 Home Telephone Number	7A Area/Access Code	7A	7B Telephone Number
8 Date of Birth (MM/DD/YYYY)	8		
9 Spouse's Taxpayer Identification No.	9	10 RDO Code	11 PSOC Code
12 Spouse's Name			
12 Last Name First Name Middle Name			
Address of the Spouse			
No.(Include Building Name) Street Subdivision Barangay			
District/Municipality City/Province Zip Code			
13 Date of Birth (MM/DD/YYYY)	13	Stamp of Receiving Office and Date of Receipt	
14 Number of sheets attached	14	15 Is this an amended return?	15 Yes No
16 Are you availing of tax relief under a special law?	16	16 Yes No	
17 If yes, specify special law	17		
Part II Details of Payment			
Particulars	Drawee Bank/Agency	Number	Date MM DD YYYY
18 Cash/Bank Debit Memo			18
19 Check	19A	19B	19C 19D
20 Tax Debit Memo	20A	20B	20C
21 Others	21A	21B	21C 21D
Machine Validation/Revenue Official Receipt Details (if not filed with the bank)			
complete? (To be filled up by the BIR)			
Yes			
No			

ENC



Part III Personal and Additional Exemptions

22 Personal Exemption
22A Status of Taxpayer (Mark one box only)
22A Single/ Widow/ Widower/ Married but Legally Separated with No Qualified Dependents Head of Family Married Taxpayer
Spouse

22B Personal Exemptions 22C

Name of Qualified Dependent Other than Children	Date of Birth			Relationship
	MM	DD	YYYY	
22D			22E	22F

23 Additional Exemptions (For Married or Head of the Family) 23A 23B
23C Number of Qualified Dependent Children 23C

Name of Qualified Dependent - Children	Date of Birth		
	MM	DD	YYYY
23D			
23E			
23F			
23G			

24 Total Exemptions (Sum of Items 22B & 23A/22C & 23B) 24A 24B

Part IV Computation of Tax

	Spouse	Taxpayer
25 Gross Taxable Compensation Income	25A	25B
26 Less: Total Exemptions (From Item 24A/24B)	26A	26B
Premium paid on health and/or hospitalization insurance not to exceed P2,400 per year. If married, for spouse claiming additional exemption.	26C	26D
Total (Sum of Items 26A & 26C/ 26B & 26D)	26E	26F
27 Taxable Compensation Income	27A	27B
28 Tax Due	28A	28B
29 Less: Tax Credits/Payments	29A	29B
Tax Withheld Per BIR Form No. 2316	29C	29D
Foreign Tax Credits	29E	29F
Tax Paid in Return Previously Filed, if this is an amended return	29G	29H
30 Total Tax Credits/Payments (Sum of Items 29A, 29C & 29E/ Sum of Items 29B, 29D & 29F)	30A	30B
31 Tax Payable/(Overpayment)	31A	31B

Part IV				Computation of Tax (continued)			
		Spouse		Taxpayer			
32 Add: Penalties							
Surcharge	32A	•	32B	•			
Interest	32C	•	32D	•			
Compromise	32E	•	32F	•			
33 Total Penalties		33A	•	33B	•		
(Sum of Items 32A, 32C & 32E/ Sum of Items 32B, 32D & 32F)							
34 Total Amount Payable/(Overpayment)		34A	•	34B	•		
(Sum of Items 31A & 33A/ 31B & 33B)							
35 Aggregate Amount Payable/(Overpayment)				35	•		
		Details of Mode of Payment		Amount			
36 Amount Paid in this Return/First Installment				36	•		
37 Amount Still Due on or before July 15				37	•		
Part V Source of Compensation and Tax Withheld							
		Employer's TIN		Amount of Compensation		Tax Withheld	
38A				38B	•	38C	•
39A				39B	•	39C	•
40A				40B	•	40C	•
41 TOTAL (Spouse).....		41A	•	41B	•		
42A				42B	•	42C	•
43A				43B	•	43C	•
44A				44B	•	44C	•
45 TOTAL (Taxpayer).....		45A	•	45B	•		
<p>I declare, under the penalties of perjury, that this return has been made in good faith, verified by me, and to the best of my knowledge and belief, is true and correct, pursuant to the provisions of the National Internal Revenue Code, as amended, and the regulations issued under authority thereof.</p>							
46 _____				47 _____			
Authorized Agent Signature over Printed Name				Taxpayer Signature over Printed Name			
Community Tax Certificate Number		Place of Issue		Date Issued			Amount
48		49		MM	DD	YYYY	51
TAX TABLE							
If Taxable Income is:				Tax Due is:			
Not over P 10,000				5 %			
Over P 10,000 but not over P 30,000				P 500 + 10 % of the excess over P 10,000			
Over P 30,000 but not over P 70,000				P 2,500 + 15 % of the excess over P 30,000			
Over P 70,000 but not over P 140,000				P 8,500 + 20 % of the excess over P 70,000			
Over P 140,000 but not over P 250,000				P 22,500 + 25 % of the excess over P 140,000			
Over P 250,000 but not over P 500,000				P 50,000 + 30 % of the excess over P 250,000			
Over P 500,000				P 125,000 + 34 % of the excess over P 500,000			
* Effective January 1, 1999, the maximum rate will be changed to 33% and 32% on January 1, 2000.							
PERSONAL EXEMPTIONS							
Single/Widow/Widower/Married but legally separated with no qualified dependent						P 20,000	
Head of the Family						P 25,000	
For each Married Individual Deriving Income						P 32,000	
ADDITIONAL PERSONAL EXEMPTIONS (for Married or Head of the family)							
For each qualified dependent child, not exceeding four (4)						P 8,000	

Compare your work with the accomplished income tax return in the *Answer Key* on pages 42 to 44. How well did you do?



Let's Remember

- ◆ Our taxes ensure us better roads, bridges and public services. So we should always pay them.
- ◆ Always be honest when filing your income tax return. After all, cheating on it means cheating yourself as well.

Well, this is the end of the module! Congratulations for finishing it. Did you like it? Did you learn anything useful from it? A summary of its main points is given below to help you remember them better.



Let's Sum Up

This module tells us that:

- ◆ You should follow certain guidelines when filling up forms.
- ◆ Filling up forms accurately is the first step in getting into a school or company you are interested in.
- ◆ Different kinds of forms require different kinds of information. But all these have something to do with whatever the form you are filling up is for. If, for example, you are applying for a driver's license, the information that the form asks for have something to do with your driving skill.
- ◆ Our taxes ensure us better roads, bridges and public service. So we should always pay them.
- ◆ Always be honest when filing your income tax return. After all, cheating on it means cheating yourself as well.



What Have You Learned?

Fill up the following form accurately.

INITIAL INFORMATION FORM	
To be completed in full by each applicant or his/her legally acting agent	
Form must be typewritten or filled up in clear capital block letters	
1.	Last name: _____
2.	First name: _____
3.	Nationality: _____
4.	Sex: _____ Civil status: _____
5.	Date of birth: _____ Day Month Year
6.	Place of birth: _____
7.	Name of mother: _____
8.	Name of father: _____
9.	Profession: _____
10.	Height (metric): _____
11.	Weight (metric): _____
12.	Color of eyes: _____
13.	Color of hair: _____
14.	Marks or scars: _____
15.	Blood type: _____
16.	Allergic to antibiotics: Yes _____ No _____
17.	Wear glasses to drive: Yes _____ No _____
18.	Passport number: _____ Place of issue: _____
Signatures (Sign 3 times for electronic scanning)	
	x
	x
	x

Compare your work with the accomplished application form in the *Answer Key* on page 45. How well did you do? If you were able to fill up the form accurately, then you may move on to another module. If you weren't, go back to the parts of this module you did not understand very well before studying a new module.



Answer Key

A. Lesson 1

Let's Try This (pages 3–6)

Choose from the following:

1. Position desired
2. Date
3. Name
4. Sex
5. City address
6. Provincial address
7. Date of birth; place
8. Civil status
9. Citizenship
10. Height
11. Weight
12. Religion
13. Telephone
14. Color of hair
15. Color of eyes
16. Spouse; occupation
17. Address
18. Number of children, their names and their dates of birth
19. Father's name; occupation
20. Mother's name; occupation
21. Their address
22. Languages or dialects you can speak or write
23. Person to be notified in case of emergency; his/her address and telephone
24. Educational background
 - a. Elementary; date graduated
 - b. High school; date graduated
 - c. Vocational; date graduated
 - d. College; date graduated
25. Employment record
26. Character references
27. Residence certificate number; place; date
28. Tax identification number
29. National Bureau of Investigation number
30. Passport number; place; date
31. Applicant's signature

Let's Study and Analyze (pages 7–8)

I don't think Gani's bio-data would give him a good impression because it was not as clean and complete as he could make it. He also gave wrong answers to some of the questions being asked for in it.

I don't think I would hire him either for the same reasons I stated above.

Personal data

Cross out the following items:

1. Position desired
2. Name
3. City address
4. Provincial address
5. Place (of birth)
6. Civil status
7. Citizenship
8. Height
9. Weight
10. Occupation (of spouse)
11. Address (of spouse)
12. Number of children, their names and their dates of birth

Let's Review (page 14)

1. complete; accurate
2. spelled; wrote
3. neatly; legibly; blue; black; typewriter; computer
4. time; comply

Let's See What You Have Learned (page 24)

BIO-DATA

PHOTO

PERSONAL DATA

Position desired: <u>Editor</u>	Date: <u>May 30, 2001</u>
Name: <u>Joy T. McGregor</u>	Sex: <u>Female</u>
City address: <u>14 Paris Street, Capitol Hills, Diliman, Quezon City 1100</u>	
Provincial address: <u>N/A</u>	
Date of birth: <u>March 31, 1971</u>	Place: <u>Quezon City</u>
Civil status: <u>Married</u>	Citizenship: <u>Filipino</u>
Height: <u>5'3"</u>	Weight: <u>100 lbs.</u>
Religion: <u>Catholic</u>	Telephone: <u>9247681</u>
Color of hair: <u>Brown</u>	Color of eyes: <u>Black</u>
Spouse: <u>Ewan McGregor</u>	Occupation: <u>Engineer</u>
Address: <u>14 Paris Street, Capitol Hills, Diliman, Quezon City 1100</u>	
Number of children, their names and their dates of birth: <u>2—Nigel McGregor, November 26, 1995;</u> <u>Camille McGregor, August 30, 1999</u>	
Father's name: <u>Aquilino Tañada</u> Occupation: <u>Businessman</u>	
Mother's name: <u>Sarah Tañada</u> Occupation: <u>Businesswoman</u>	
Their address: <u>4968 Onyx Street, Makati City 1207</u>	
Languages or dialects you can speak or write: <u>Filipino, English, German</u>	
Person to be notified in case of emergency: <u>Ewan McGregor</u>	
His/Her address and telephone: <u>14 Paris St., Capitol Hills, Diliman, Quezon City 1100—9247681</u>	

EDUCATIONAL BACKGROUND

Elementary: Academia de Santisima Trinidad Date graduated: March 1984
 High school: Stella Maris College Date graduated: March 1988
 Vocational: N/A Date graduated: N/A
 College: UP Diliman Date graduated: March 1992
 Course: B.A. English
 Special skills: Web design, other computer applications—Pagemaker, Photoshop, etc.

EMPLOYMENT RECORD (From present work backward)

FROM	TO	POSITION	COMPANY
<u>1992</u>	<u>2000</u>	<u>Subject area editor</u>	<u>Phoenix Publishing House, Inc.</u>
<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	<u> </u>	<u> </u>	<u> </u>

CHARACTER REFERENCES

(Not related to you)

NAME	OCCUPATION	ADDRESS
<u>Roger Manahan</u>	<u>Editor in chief</u>	<u>Phoenix Pub. House</u>
<u>Arlene Bernal</u>	<u>VP for operations</u>	<u>Phoenix Pub. House</u>
<u> </u>	<u> </u>	<u> </u>

Res. Cert. No. A 10528769 N/A
 Issued at Quezon City Passport no.
 Issued on April 27, 2001
 T.I.N. 904-639-298 Place of issue Date
 N.B.I. no. 6456778

Applicant's signature

B. Lesson 2

Let's Try This (page 18)

1. ICR number
2. Residence tax due
3. Basic residence tax due
4. Total
5. Taxpayer's signature

Let's Try This (page 21)

1. b
2. d
3. e
4. c
5. a

Let's See What You Have Learned (page 23)

UP FORM 5. UNIVERSITY OF THE PHILIPPINES CERTIFICATE OF REGISTRATION (REV. 09-99)										
WRITE IN BLOCK LETTERS. Use an "X" mark in answering information preceded by a box <input type="checkbox"/>										
STUDENT NUMBER		NAME (Last, Given, Middle. If a married woman, encircle maiden name)					DEGREE & MAJOR		TERM & SY.	
99-07380		HILARIO, NORMAN TARDESILIA					BA BROAD COMM		1 ST 00-01	
STUDENT'S COPY	CLASS CODE	COURSE NO.	SECTION	UNITS	DAYS	TIME	ROOM	LAB. FEE	CODE	Tuition
	21926	B 100	MHU	3	Mth	8 ³⁰ -10 ⁰⁰	M 204			Miscellaneous
	21907	Comm 100	MHX	3	Mth	10 ⁰⁰ -11 ³⁰	A 101			Student Fund
	21924	J 110	MHY	3	Mth	1-2 ³⁰	M 201			Laboratory Fee
	21910	Hum 2	TFU	3	TF	8 ³⁰ -10 ⁰⁰	A 104			EDF
	21914	Kas 2	TFX	3	TF	10 ⁰⁰ -11 ³⁰	M 202			Entrance
										Deposit
										Fine
										TOTAL FEES
										Less: Scholarship/Privilege
			TOTAL UNITS	15	Country of Citizenship		Amount Received by:		Assessed by:	
Signature and Printed Name of Adviser			STFAP Bracket No. Certified by:		CASH:		CHECK:		Scholarship / Privilege	
Signature of Student			First Time to enroll in UP? NO		LOAN:					
					O. R. No.		Date		Amount Paid	


C. Lesson 3

Let's Review (page 32)

1. This refers to how much you and your spouse, if any, received as compensation for your work.
2. This refers to the sum of the gross taxable compensation income and other taxable income.
3. This refers to the sum of your tax due and your spouse's tax due.
4. This refers to the total of the tax withheld, foreign tax credits and tax paid in return previously filed.
5. This refers to the sum of your total amount payable and your spouse's total amount payable.

Let's See What You Have Learned (pages 33-35)

DLN:



Republika ng Pilipinas
Kagawaran ng Pananalapi
Kawanihan ng Rentas Internas

Annual Income Tax Return

BIR Form No.
1700
(Formerly Form 1701A)
January 1998

For Individuals Earning Purely Compensation Income

Fill in all applicable spaces. Mark all appropriate boxes with an "X".

<p>1 For the Year 1 2000</p>	<p>BCS Number/Item Number (To be filled up by the BIR)</p>
---	--

Part I Background Information

2 Taxpayer Identification No.	2	3	4
4,1,9	5,6,8	2,5,8	PSOC Code

5 Taxpayer's Name

5	6	7
REYES,	CLAIRE	DE LOS SANTOS
Last Name	First Name	Middle Name

6 Registered Address

6	7A	7B
729 ARAYAT BUILDING	QUEZON AVENUE	1104
No.(Include Building Name)	Street	Zip Code

QUEZON CITY

7 Home Telephone Number	7A Area/Access Code	7B Telephone Number	7C PSOC Code
3741433	7A	7B	7C

8 Date of Birth (MM/DD/YYYY) 8 07091972

9 Spouse's Taxpayer Identification No.	10	11
9	RDO Code	PSOC Code

12 Spouse's Name

12	13	14
Last Name	First Name	Middle Name

Address of the Spouse

No.(Include Building Name)	Street	Barangay
District/Municipality	City/Province	Zip Code

13 Date of Birth (MM/DD/YYYY) 13	Stamp of Receiving Office and Date of Receipt
14 Number of sheets attached 14	
15 Is this an amended return? 15 <input type="checkbox"/> Yes <input type="checkbox"/> No	
16 Are you availing of tax relief under a special law? 16 <input type="checkbox"/> Yes <input type="checkbox"/> No	

17 If yes, specify special law 17

Part II Details of Payment

Particulars	Drawee Bank/Agency	Number	Date			Amount	18
			MM	DD	YYYY		
18 Cash/Bank Debit Memo							complete? (To be filled up by the BIR) <input type="checkbox"/> Yes <input type="checkbox"/> No
19A Check	19B	19C	19D				
20A Tax Debit Memo	20B	20C	20D				
21A Others	21B	21C	21D				

Machine Validation/Revenue Official Receipt Details (if not filed with the bank)

ENC

Part III Personal and Additional Exemptions

22 Personal Exemption
22A Status of Taxpayer (Mark one box only)
 22A Single/ Widow/ Widower/ Married but Legally Separated with No Qualified Dependents Head of Family Married Spouse Taxpayer

Personal Exemptions 22B 22C **20,000 .00**

Name of Qualified Dependent Other than Children	Date of Birth			Relationship
	MM	DD	YYYY	
22D				22F

23 Additional Exemptions (For Married or Head of the Family) 23A 23B

23C Number of Qualified Dependent Children

Name of Qualified Dependent - Children	Date of Birth		
	MM	DD	YYYY
23D			
23E			
23F			
23G			

24 Total Exemptions (Sum of Items 22B & 23A/22C & 23B) 24A 24B **20000 .00**

Part IV Computation of Tax

	Spouse	Taxpayer
25 Gross Taxable Compensation Income	25A	25B 32975 .33
26 Less: Total Exemptions (From Item 24A/24B)	26A	26B 20000 .00
Premium paid on health and/or hospitalization insurance not to exceed P2,400 per year. If married, for spouse claiming additional exemption.	26C	26D
Total (Sum of Items 26A & 26C/ 26B & 26D)	26E	26F
27 Taxable Compensation Income	27A	27B 12975 .33
28 Tax Due	28A	28B 797 .53
29 Less: Tax Credits/Payments		
Tax Withheld Per BIR Form No. 2316	29A	29B
Foreign Tax Credits	29C	29D
Tax Paid In Return Previously Filed, if this is an amended return	29E	29F
30 Total Tax Credits/Payments (Sum of Items 29A, 29C & 29E/ Sum of Items 29B, 29D & 29F)	30A	30B
31 Tax Payable/(Overpayment)	31A	31B

Part IV Computation of Tax (continued)			
		Spouse	Taxpayer
32 Add: Penalties			
Surcharge	32A	.	32B
Interest	32C	.	32D
Compromise	32E	.	32F
33 Total Penalties (Sum of Items 32A, 32C & 32E/ Sum of Items 32B, 32D & 32F)	33A	.	33B
34 Total Amount Payable/(Overpayment) (Sum of Items 31A & 33A/ 31B & 33B)	34A	.	34B
35 Aggregate Amount Payable/(Overpayment) (Sum of Items 34A & 34B)			35

Details of Mode of Payment		Amount
36 Amount Paid in this Return/First Installment	36	.
37 Amount Still Due on or before July 15	37	.

Part V Source of Compensation and Tax Withheld			
Employer's TIN	Amount of Compensation	Tax Withheld	
38A	38B	38C	.
39A	39B	39C	.
40A	40B	40C	.
41 TOTAL (Spouse).....	41A	41B	.
42A 830 400 248 042	42B 32975.33	42C	797.53
43A	43B	43C	.
44A	44B	44C	.
45 TOTAL (Taxpayer).....	45A	45B	797.53

I declare, under the penalties of perjury, that this return has been made in good faith, verified by me, and to the best of my knowledge and belief, is true and correct, pursuant to the provisions of the National Internal Revenue Code, as amended, and the regulations issued under authority thereof.

46 _____ 47 Claire Reyes
 Authorized Agent Signature over Printed Name Taxpayer Signature over Printed Name

Community Tax Certificate Number	Place of Issue	Date Issued			Amount
		MM	DD	YYYY	
48 29030956	49 QUEZON CITY	50 02	18	2001	51 37.00

TAX TABLE	
If Taxable Income is:	Tax Due is:
Not over P 10,000	5%
Over P 10,000 but not over P 30,000	P 500 + 10% of the excess over P 10,000
Over P 30,000 but not over P 70,000	P 2,500 + 15% of the excess over P 30,000
Over P 70,000 but not over P 140,000	P 8,500 + 20% of the excess over P 70,000
Over P 140,000 but not over P 250,000	P 22,500 + 25% of the excess over P 140,000
Over P 250,000 but not over P 500,000	P 50,000 + 30% of the excess over P 250,000
Over P 500,000	P 125,000 + 34% of the excess over P 500,000

* Effective January 1, 1999, the maximum rate will be changed to 33% and 32% on January 1, 2000.

PERSONAL EXEMPTIONS	
Single/Widow/Widower/Married but legally separated with no qualified dependent	P 20,000
Head of the Family	P 25,000
For each Married Individual Deriving Income	P 32,000
ADDITIONAL PERSONAL EXEMPTIONS (for Married or Head of the family)	
For each qualified dependent child, not exceeding four (4)	P 8,000

D. What Have You Learned? (page 37)

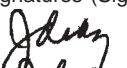
INITIAL INFORMATION FORM


To be completed in full by each applicant or his/her authorized agent

Form must be typewritten or in clear capital block letters

1. Last name: Diaz
2. First name: Joan
3. Nationality: Filipino
4. Sex: Female Civil status: Single
5. Date of birth: 9 December 1975
Day Month Year
6. Place of birth: Quezon City
7. Name of mother: Anelia Diaz
8. Name of father: Manuel Diaz
9. Profession: Research assistant
10. Height (metric): 160 cm
11. Weight (metric): 45.45 kg
12. Color of eyes: Black
13. Color of hair: Brown
14. Marks or scars: None
15. Blood type: B
16. Allergic to antibiotics: Yes _____ No 4
17. Wear glasses to drive: Yes _____ No 4
18. Passport number: N/A Place of issue: N/A

Signatures (Sign 3 times for electronic scanning)

x 

x 

x 