

APPLICATION PROCESS-

Securities and

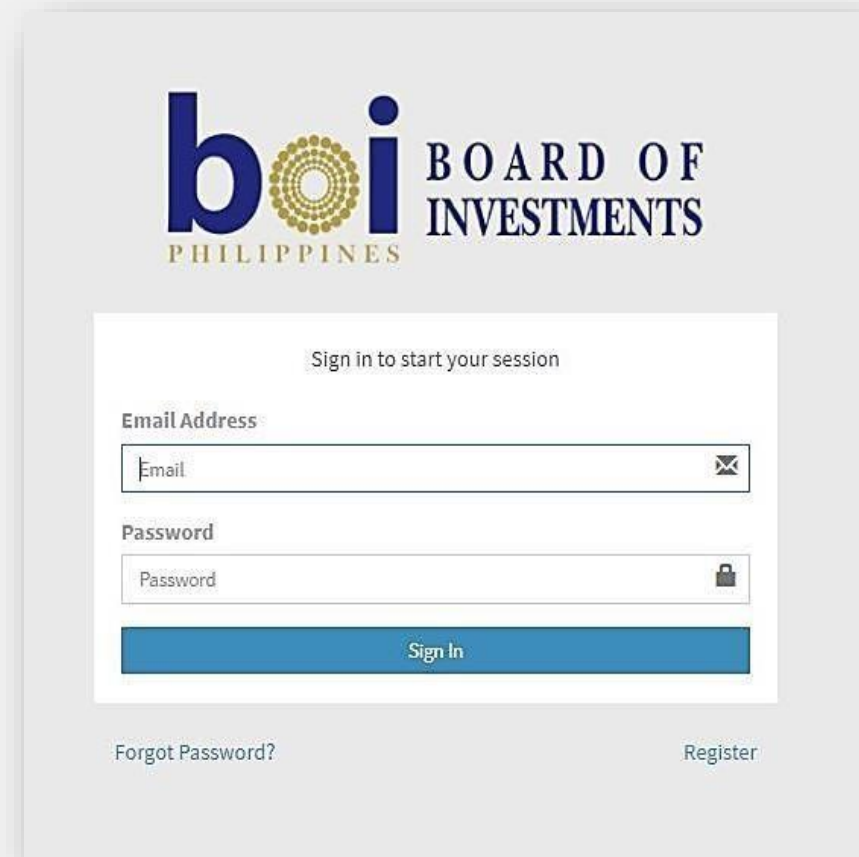
Exchange

Commission

User's Manual

Step 1

Log in using the email and password you have registered with.



The image shows a login form for the Board of Investments Philippines. At the top is the logo, which consists of the lowercase letters 'boi' in a bold, blue font, with a circular emblem of gold dots between the 'o' and 'i'. To the right of the logo, the words 'BOARD OF INVESTMENTS' are written in a blue, serif font, and 'PHILIPPINES' is written in a smaller, gold, sans-serif font below it. Below the logo, the text 'Sign in to start your session' is centered. The form contains two input fields: 'Email Address' with a placeholder 'Email' and an envelope icon, and 'Password' with a placeholder 'Password' and a padlock icon. A blue 'Sign In' button is positioned below the password field. At the bottom left, there is a link for 'Forgot Password?' and at the bottom right, a link for 'Register'.

boi BOARD OF INVESTMENTS
PHILIPPINES

Sign in to start your session

Email Address
Email

Password
Password

Sign In

[Forgot Password?](#) [Register](#)

Step 2

All your compliance requirements for submission will be shown in the Dashboard. This is only applicable for Registration and Endorsement applications.

The dashboard interface is divided into several sections:

- My Applications:** A sidebar menu with options: My Applications, My Compliances, APPLICATION FORMS (Registration Forms, Accreditation Forms, Incentives, Compliance Forms, Endorsement Forms), USER MANUAL, and Documentations.
- COMPLIANCE Forms:** A section with an orange folder icon and the text "COMPLIANCE Forms".
- VIEW Accreditation Forms:** A section with a teal folder icon and the text "VIEW Accreditation Forms".
- Applications / Compliances For Action:** A table with columns: Control No., Received, App Type, Enterprise, Forwarded by, Action Taken, Remarks, Preview, Action. Below the table, it says "Your worklist is empty."
- Inquiries:** A table with columns: Control No., Received On, Type, Project, Forwarded by, Action Taken, Remarks, Preview, Action. Below the table, it says "No inquiry requires your action".
- Compliance to Terms and Conditions:** A blue banner with the text "STC Compliance" and "You have 12 compliance to STC that requires attachments. Kindly upload it here:" with an "Upload" button.
- Reportorial Requirements:** A table with columns: Control No., Application Type, CR No. / Endorsement No., Submission Year, Status, Deadline, Actions.

Control No.	Application Type	CR No. / Endorsement No.	Submission Year	Status	Deadline	Actions
1	Annual Report on Actual Operations	2019-001	2020	Pending	April 30, 2020	Submit
2	Audited Financial Statement	2019-001	2020	Pending	Within 1 month from the Date of e-filing to BIR	Submit
3	Income Tax Return	2019-001	2020	Pending	Within 1 month from the Date of e-filing to BIR	Submit

Step 3

To upload a reportorial requirement (this may vary depending on the type of Application i.e. Registration or Endorsement), click on the **Submit** button.

Reportorial Requirements						
Control No.	Application Type	CR No. / Endorsement No.	Submission Year	Status	Deadline	Actions
58	Securities and Exchange Commission	2021-0007	2022	Pending	April 16, 2021	Submit
60	Annual Export Performance Report of Foreign Export Enterprises	FIA-0012-2021	2022	Pending	May 30, 2021	Submit
64	Securities and Exchange Commission	2021-0008	2022	Pending	30 days from the Issuance of License Number	Submit

Step 4

You will be redirected to the Compliance Form. Fill out the form from Step 1 up to the last step.

Note: The form may vary depending on the type of application.

The screenshot displays the BOI Online interface for the 'Submission of Securities and Exchange Commission'. The page is titled 'Compliance Form' and shows a progress bar with three steps: 'Previous', 'Step 1 Financial Statement Details', and 'Step 2 Upload Documents'. The 'Next' button is visible at the end of the progress bar.

ENDORSEMENT INFORMATION

ID :	3372	Certificate Registration No. :	2021-0008
Application Type :	Establishment of Regional Operating Headquarters (ROHQ) in the Philippines / Regional or Area Headquarters (RHQ) in the Philippines	Application Classification :	New
Date Created :	April 10, 2021, 10:42 a.m.	Date Submitted :	April 10, 2021, 10:43 a.m.
Date Accepted :	April 10, 2021, 10:52 a.m.	Date Approved :	April 10, 2021, 10:57 a.m.

GENERAL INFORMATION

Company Name :	BOI	Country Of Incorporation :	China, Peoples' Republic Of
Principal Office/Headquarters :	China	Name Of Parent Company (If Applicant Has One) :	BOI

Step 5

If you missed the deadline, the computation of penalty will be shown. You can either ask for appeal or confirm the computation

The screenshot displays a confirmation screen with the following elements:

- TOTAL**: 300.00
- CONFIRMATION**: Do you want to accept the computation? This action is irreversible.
- Dropdown Menu**: A dropdown menu is highlighted with a red box, containing a dashed line and a downward arrow.
- Buttons**: 'Previous' and 'Proceed' buttons are located at the bottom of the screen.

Step 6

If you want to ask for appeal, select **No**. You need to go directly to BOI to express your concern regarding the computation.

Annual Report on Actual Operations	2020	April 30, 2019	June 24, 2019, 11:30 a.m.	55	50.00	10.00	300.00
TOTAL							300.00

CONFIRMATION

Do you want to accept the computation? This action is irreversible.

No

Assessment

Kindly go directly to the BOI to express your concern about the Assessment.

Previous

Proceed

Step 7

If you are okay with the computation, select **Yes** and proceed to the last step.

CONFIRMATION

Do you want to accept the computation? This action is irreversible.

Yes

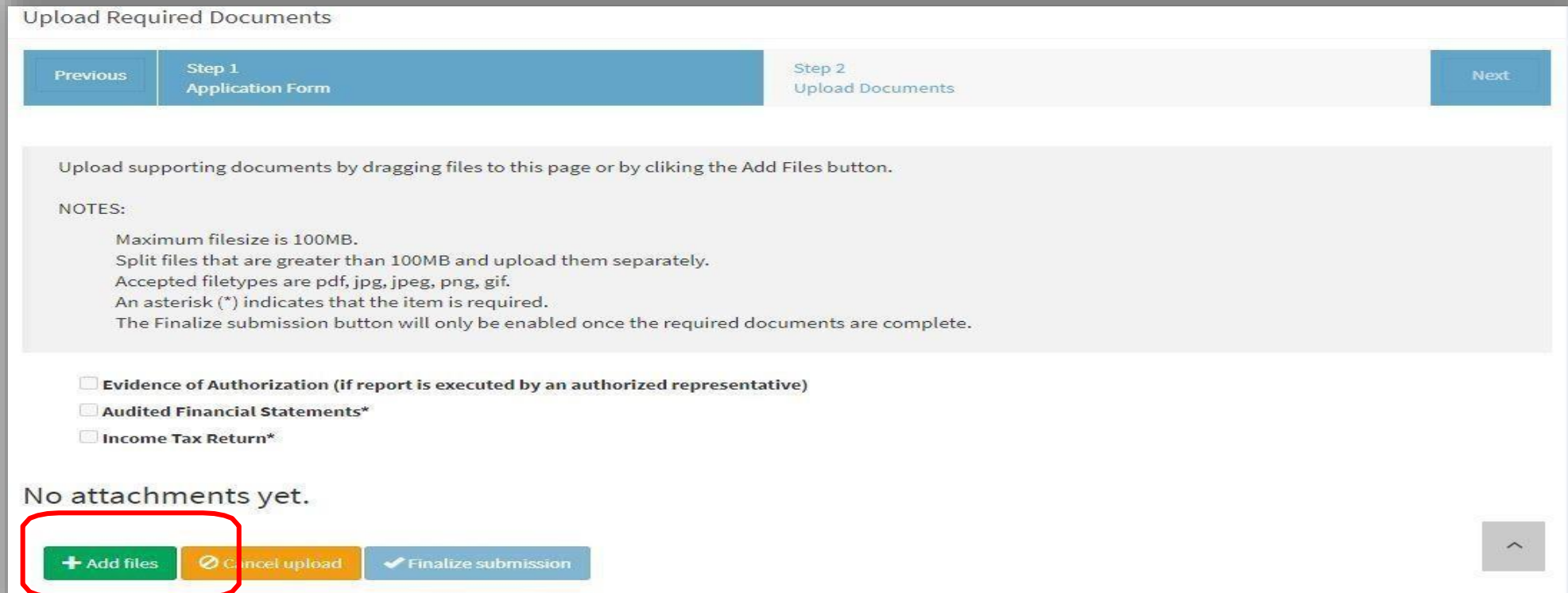
Assessment
This amount will be considered as final.

Previous Proceed

Step 8

Click the **Add files** button to select the files to be submitted to satisfy the necessary requirements.

NOTE: Read the instructions carefully. Restrictions are in place to facilitate a smooth submission of requirements.



Upload Required Documents

Previous Step 1 Application Form Step 2 Upload Documents Next

Upload supporting documents by dragging files to this page or by clicking the Add Files button.

NOTES:

- Maximum filesize is 100MB.
- Split files that are greater than 100MB and upload them separately.
- Accepted filetypes are pdf, jpg, jpeg, png, gif.
- An asterisk (*) indicates that the item is required.
- The Finalize submission button will only be enabled once the required documents are complete.

Evidence of Authorization (if report is executed by an authorized representative)

Audited Financial Statements*

Income Tax Return*

No attachments yet.

+ Add files Cancel upload Finalize submission

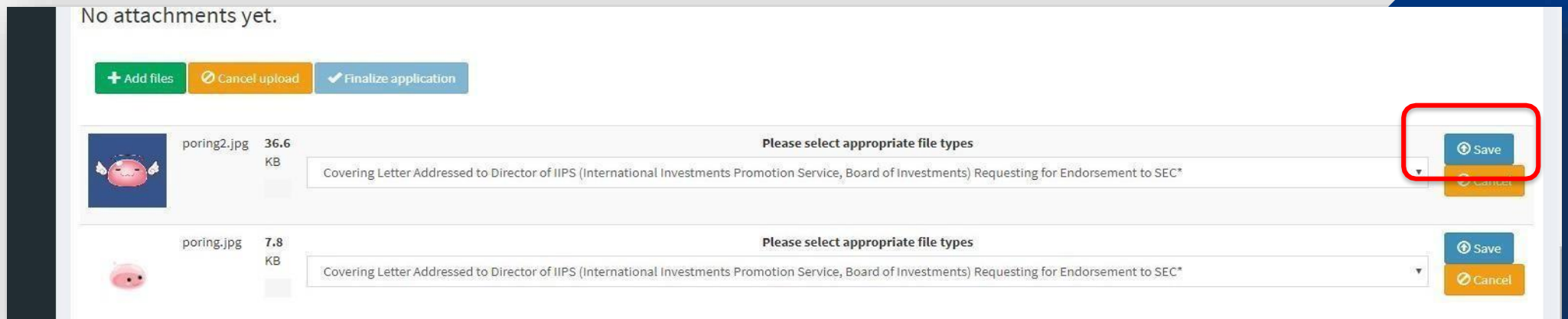
Step 9

Once the files to be uploaded are selected; they will appear on the lower part of the page. Select the type of requirement that the file satisfies then click the **Save** button.

NOTES:

- Multiple files may be selected to satisfy a particular requirement.
- You may remove a file by clicking the **Cancel** button alongside the Save button. Alternatively, you may remove all files by clicking the **Cancel upload** button next to the Add files button.

If you want to leave the site and continue at a later time, you may do so (instructions will be shown later). All previously uploaded files will be shown under the **previously uploaded files** section



The screenshot displays a file upload interface. At the top, it says "No attachments yet." Below this are three buttons: "+ Add files" (green), "Cancel upload" (orange), and "Finalize application" (blue). The main area shows two files being processed:

File Name	Size	Requirement	Actions
poring2.jpg	36.6 KB	Covering Letter Addressed to Director of IIPS (International Investments Promotion Service, Board of Investments) Requesting for Endorsement to SEC*	Save, Cancel
poring.jpg	7.8 KB	Covering Letter Addressed to Director of IIPS (International Investments Promotion Service, Board of Investments) Requesting for Endorsement to SEC*	Save, Cancel





The "Save" button for the first file is highlighted with a red box. The interface also includes a "Please select appropriate file types" prompt for each file.

Step 10

Wait for the upload to finish.

You uploaded 4 attachments.

[+ Add files](#) [Cancel upload](#) [Finalize application](#)

	poring2.jpg 36.6 KB	Please select appropriate file types	Delete
<p>Covering Letter Addressed to Director of IIPS (International Investments Promotion Service, Board of Investments) Requesting for Endorsement to SEC*</p>			
	poring.jpg 7.8 KB	Please select appropriate file types	Delete
<p>Screenshot of System Generated SEC Company Registration*</p>			
	poring2.jpg 36.6 KB	Please select appropriate file types	Delete
<p>Certification from the Philippine Consulate/Embassy, or from the Philippine Commercial Office or duly authenticated certification from the Department of Trade and Industry or its equivalent</p>			
	poring.jpg 7.8 KB	Please select appropriate file types	Delete
<p>Duly Authenticated Certification from Principal Officer of the Foreign Entity to the Effect that the said Foreign Entity has been authorized by its Board of Directors or Governing Body to Establi</p>			

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Step 11





Click on the **Finalize application** button to submit the requirements.

NOTES:

- You may delete files uploaded to the server by clicking on the **Delete** button.
- The **Finalize application** button will not be clickable until all requirements have been satisfied.

You uploaded 4 attachments.

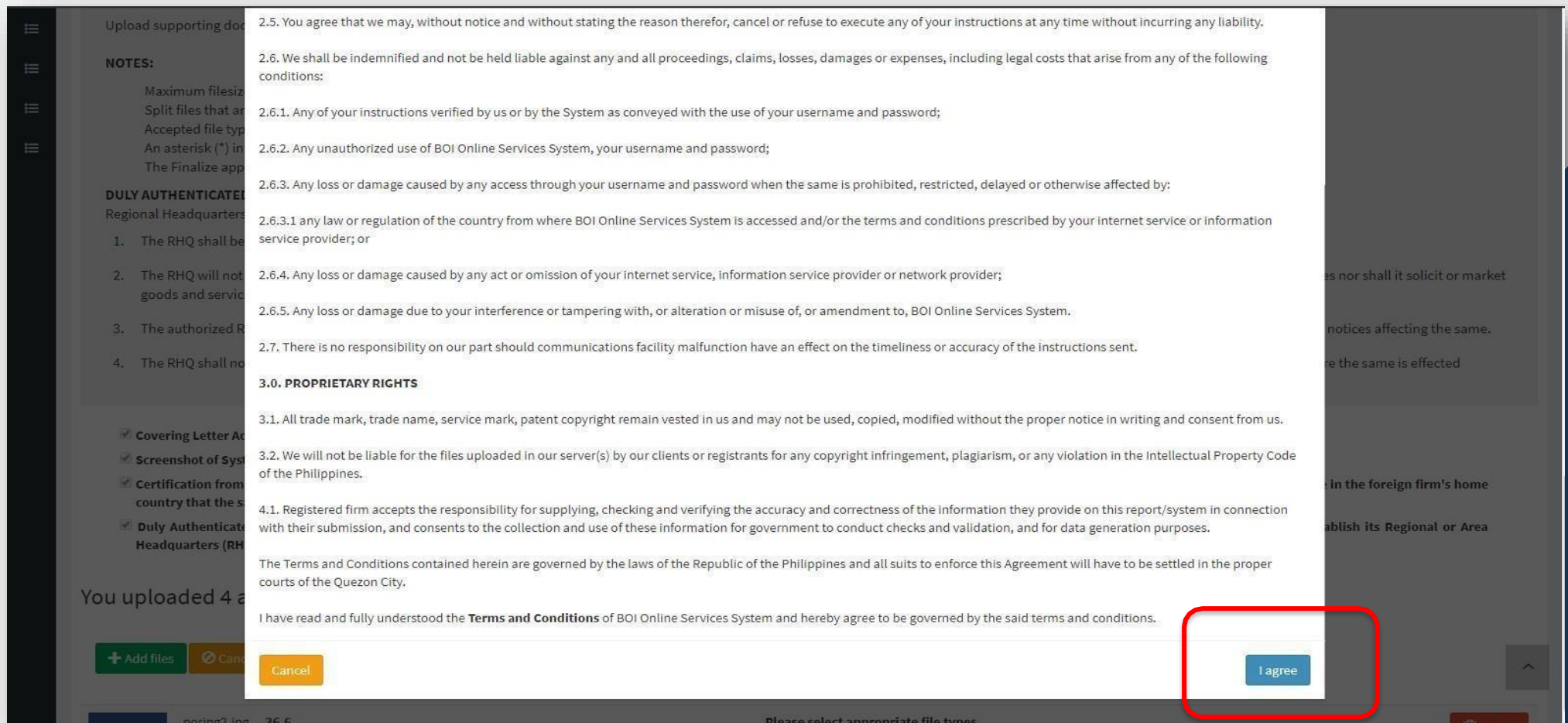
[+ Add files](#) [Cancel upload](#) [Finalize application](#)

	poring2.jpg 36.6 KB	Please select appropriate file types Covering Letter Addressed to Director of IIPS (International Investments Promotion Service, Board of Investments) Requesting for Endorsement to SEC*	Delete
	poring.jpg 7.8 KB	Please select appropriate file types Screenshot of System Generated SEC Company Registration*	Delete
	poring2.jpg 36.6 KB	Please select appropriate file types Certification from the Philippine Consulate/Embassy, or from the Philippine Commercial Office or duly authenticated certification from the Department of Trade and Industry or its equivalent	Delete
	poring.jpg 7.8 KB	Please select appropriate file types Duly Authenticated Certification from Principal Officer of the Foreign Entity to the Effect that the said Foreign Entity has been authorized by its Board of Directors or Governing Body to Establi	Delete

Step 12

Click on the **I agree** button to finalize your application for processing.

NOTE: You may click on the **Cancel** button to close the Terms and Conditions without submitting the requirements.



Upload supporting documents

NOTES:

- Maximum file size
- Split files that are too large
- Accepted file types
- An asterisk (*) in the filename
- The Finalize application button

DULY AUTHENTICATED

Regional Headquarters

- The RHQ shall be responsible for the submission of the application.
- The RHQ will not be held liable for the loss of goods and services.
- The authorized Representative shall be responsible for the submission of the application.
- The RHQ shall not be held liable for the loss of goods and services.

Covering Letter Attached

Screenshot of System

Certification from the country that the service is provided

Duly Authenticated Representative of the Regional Headquarters (RHQ)

You uploaded 4 documents

2.5. You agree that we may, without notice and without stating the reason therefor, cancel or refuse to execute any of your instructions at any time without incurring any liability.

2.6. We shall be indemnified and not be held liable against any and all proceedings, claims, losses, damages or expenses, including legal costs that arise from any of the following conditions:

2.6.1. Any of your instructions verified by us or by the System as conveyed with the use of your username and password;

2.6.2. Any unauthorized use of BOI Online Services System, your username and password;

2.6.3. Any loss or damage caused by any access through your username and password when the same is prohibited, restricted, delayed or otherwise affected by:

2.6.3.1 any law or regulation of the country from where BOI Online Services System is accessed and/or the terms and conditions prescribed by your internet service or information service provider; or

2.6.4. Any loss or damage caused by any act or omission of your internet service, information service provider or network provider;

2.6.5. Any loss or damage due to your interference or tampering with, or alteration or misuse of, or amendment to, BOI Online Services System.

2.7. There is no responsibility on our part should communications facility malfunction have an effect on the timeliness or accuracy of the instructions sent.

3.0. PROPRIETARY RIGHTS

3.1. All trade mark, trade name, service mark, patent copyright remain vested in us and may not be used, copied, modified without the proper notice in writing and consent from us.

3.2. We will not be liable for the files uploaded in our server(s) by our clients or registrants for any copyright infringement, plagiarism, or any violation in the Intellectual Property Code of the Philippines.

4.1. Registered firm accepts the responsibility for supplying, checking and verifying the accuracy and correctness of the information they provide on this report/system in connection with their submission, and consents to the collection and use of these information for government to conduct checks and validation, and for data generation purposes.

The Terms and Conditions contained herein are governed by the laws of the Republic of the Philippines and all suits to enforce this Agreement will have to be settled in the proper courts of the Quezon City.

I have read and fully understood the **Terms and Conditions** of BOI Online Services System and hereby agree to be governed by the said terms and conditions.

Please select appropriate file types

Step 13

Your application will now be submitted for processing. You will be shown the application's details. The application details are also printable. All BOI staff that will process your application will see the same details.

NOTE: You will also receive an email to confirm the receipt of your application.

The screenshot displays a web interface for viewing compliance details. At the top, a green banner states: "Your compliance submission has been received by the BOI Online Services System." Below this is a breadcrumb trail: "Home / View Compliance / Annual Export Performance Report of Foreign Export Enterprises". The main content area shows "Compliance Number: 430" and a large blue "Submitted" button. A navigation bar includes tabs for "Compliance Details", "Assessment", "Related Application Details", and "Applicant Details", along with a "Print Compliance" icon. The "COMPLIANCE INFORMATION" section contains the following data:

ID :	430	Compliance No :	COMP-AEPR-2021-00056
Application Type :	Annual Export Performance Report of Foreign Export Enterprises		
Date Added :	April 29, 2021, 9:46 p.m.	Date Submitted :	April 29, 2021, 9:47 p.m.
Date Accepted :	--		

Thank you

