

Instructions/Documents to be submitted for each category along with the signed declaration form for the FY.2017-18.

Housing Loan:

The following documents have to be uploaded as mentioned below

- a. Statement of Account as of date and the provisional certificate (in Original) issued by the bank.
- b. Completion certificates issued by builder if the house is completed during the current financial year 2017-18

House Rent Receipt:

- a. In case you are staying in a rented house, you can use the attached template (House Rent Receipt.doc)
- b. Fill in the template correctly, affix a One Rupee Revenue stamp at the place provided and get it signed from the House Owner.
- c. In case there is a change in the rent details, use separate templates for each type otherwise one template is enough for the whole period.
- d. Exemption on HRA is provided from the month for which HRA receipt is submitted.
- e. Maintenance expenses of Flat is not an eligible expenditure for this purpose and cannot be considered as part of rent.
- f. Reiterate the facts given above tabulated as below

Rent Paid per Month	Documents Required
Less than Rs.8,300/- (yearly below Rs.1,00,000)	Duly filled House Rent Receipts (Please Use Company provided template)
Rs.8,300/- to 14,999/-(yearly below Rs. 1,80,000)	Duly filled House Rent Receipts (Please Use Company provided template) + Landlord (House owner) PAN Card
Rs15,000/- and above- (yearly above Rs. 1,80,000)	Duly filled House Rent Receipts (Please Use Company provided template) + Landlord (House owner) PAN Card + Active Rental Agreement

LTA:

- a. No LTA exemption.

Previous employment:

Employees who joined us during the current financial year 2017-18, are requested to submit the Form 12B or Tax calculation sheet for the period issued by your previous employer along with the investment proofs based on which the tax deductions are claimed

Note:

- a. All the investment proofs, Home Loan provisional loan statement, House Rent Receipt should be uploaded.
- b. Refer to **Annexure I**, which is part of this document for additional details/ parameters based on which the investment proofs will be considered.
- c. **Annexure I**

General parameters based on which the investment proofs are considered**a. PF deduction through payroll**

- This component is part of Rs.1, 50,000/- investment under Sec 80C and same will be considered by default. You are not required to update the same in the declaration.
- If you have any additional contribution, you need to mention the same in the Declaration.

b. Life Insurance policies

- Receipts pertaining to previous year are not considered.
- Payment to be made in the subsequent months post March 2018, are not considered.
- Policies in name of parents are not considered.
- Premium receipt should be signed by authorized person of the Insurance Company along with the company seal.
- If premium is paid through on line and original premium paid certificate is not available, please submit copy of policy, online receipt and bank statement.
- The relation of policy holder with employee should be mentioned on face of the receipt.

c. Tuition fee Receipts

- Child fee paid towards Books, computer, donations, caution fee, corpus fund, etc – are not considered.
- Child fee paid for play schools/pre-nursery/nursery – will be considered.
- Child fee for the third child is not considered.
- Child fee paid for education abroad is not considered.
- Child fee paid in the last financial year is not considered.
- Child fee to be paid in the subsequent months but receipts not submitted is not considered.

d. Home Loan

- Statement with improper break up of Principal and Interest component for the current financial year is not considered.
- Statement pertaining to last financial year is not considered.
- Statement with only Pre-EMI interest is not considered.
- Statements without signature / stamp by banker on certificate issued is not considered.

e. Mutual funds

- Amount to be invested in the subsequent months will not be considered.
- Receipts without stamp/seal of acknowledgement are not considered.
- Copy of application as a proof of investment is not considered.
- Copy of cheque towards investment is not considered.

f. Reimbursements-Medical

- Amount spent on medical reimbursements for employee himself, spouse, children and depended parents will be considered for exemption.
- Medical bills without date and name will not be considered
- Medical bills without overwriting will not be considered
- Medical bills with the dates in the current Financial Year 1st April 2017 to 31st March 2018 only will be considered.