



Ascent HR Consulting Services Pvt. Ltd.

**User Guide for Employee Proof Submission
(Scan copy submission)**

Form v1.0 – Standard Document

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About Ascent Consulting Services Private Limited

People Management is a key business function that has a direct impact on competitiveness, efficiency of operations, and long-term profitability of an organization. Which is why, organizations have been investing enormous time and resources in the HR function, which diverts focus from the organization's core business.

Ascent Consulting precisely addresses this anomaly through its 360 degree HR Management Solutions that transform the HR service delivery. While these solutions accomplish cost reduction, greater efficiencies and improved quality, our larger effort is aimed at improving organizational efficiency and not just creating incremental change.

AscentHR has achieved this by building the right mix of skills and knowledge required for an effective Outsourced HR Management function. Our solutions employ a matrix of technology, domain expertise, streamlined business workflow, and highly skilled people to create, tangible, measurable, performance improvements throughout the client's organization.

AscentHR is recognized as one of the most trusted partners in this business by clients around the world. We work as an extension of our client's business. Our management and delivery teams are passionate about building efficiencies in our client's business.

Our bespoke technology solutions for HR Needs are unique in the industry and are backed by the best of industry practices in Data management, Information Security, Data Privacy, anywhere access and very user friendly processes.

At AscentHR automation of all the functions is achieved through a robust, configurable and comprehensible **HRMS** application which caters to diverse organizational strategies and standards.

PREFACE

About this Manual

This manual provides guidelines for the user on EPSF – Employee can fill all the EPSF related details like Personal Details, Previous Employment, HRA, Housing loan Other income (Bank interest, etc.), Ded. Under Sec 80C to 80CCD, Ded. Under Chapter VI A successfully using the application.

Document Conventions

In this manual, certain words are represented in different fonts, sizes.

Bold indicates the name of menu items, options, dialog boxes, windows and functions.

Additionally this document has different strategies to draw User attention to certain pieces of information. In order of how critical information is to your system, these items are marked as a note, tip.

Icon	Purpose
	Note

TABLE OF CONTENTS

Login to the application.....	9
Employee submits EPSF details in the application.....	10
After login to the portal, employee views Welcome to PowerHR page.....	10
Employee clicks Start button to fill the EPSF Details	11
Employee fills the Personal Details in the application.....	12
Employee clicks Previous Emp and fills the Previous employment details in the application.....	17
Employee clicks HRA tab and fills the HRA details in the application.....	20
Employee uploads the document in the application.....	22
Employee fills Housing loan information in the application.....	23
Employee fills House Property Income/(Loss) - Let Out Property (Sec 24(b)).....	24
Employee fills Interest on Housing Loan-Self Occupied Property (Sec 24(b)) details	29
Employee can fill the specific application through the quick jump option.....	31
Employee fills the Other Income (Bank Interest, etc.) details in the application.....	32
Employee fills the Ded. Under Sec 80C to 80CCD details in the application.....	33
Employee fills Deduction under Life Insurance Pension Scheme (Sec 80CCC)] form.....	34
Employee fills the Public Provident Fund details in the form.....	35
Employee fills the Children Education Expenses details in the form	37
Employee fills the National saving certificate details in the form.....	38
Employee fills Insurance Premium details in the form	39

Employee fills Housing Loan Principal Repayment details	40
Employee fills Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years details.....	41
Employee fills the Sukanya Samridhi Scheme details in the form	44
Employee to fill the Accrued NSC Interest details in the form.....	45
Employee to fill the Mutual Funds / ULIP details in the form	47
Employee to fill the Employees contribution towards NPS details in the form	49
Employee to fill the Ded. Under Chapter VI A section in application	50
Employee to fill Medical Insurance Premium (Sec 80D) details in the form	51
Employee to fill Medical Insurance Premium for parents (sec 80D) details in form	52
Employee to fill Medical Insurance Premium paid for senior Citizen (Parents) details	54
Employee to fill Medical for Handicapped Dependents (Sec 80DD) details in form	56
Employee to fill Medical for Handicapped Dependents (severe disability) (Sec 80 DD) details	58
Employee to fill Medical for Specified Diseases (Sec 80DDB) details in the form	60
Employee fills Medical for specified Diseases for senior citizen details.....	61
Employee to fill Interest Paid on Higher Education Loan (Sec80E) details in form	62
Employee to fill Deduction for Permanent Disability (Sec 80U) details	64
Employee to fill Interest on House Property - Additional Exemption details in the form ...	66
Employee views the Investment Proof Submission page	67
If employee clicks Submit and Preview button	67

TABLE OF FIGURES

Figure 1: Login page.....	9
Figure 2: Employee clicks EPSF (Investment Proofs) Submission.....	10
Figure 3: Employee click the Start button.....	11
Figure 4: Employee fills Personal details	12
Figure 5: Confirmation dialog box, click Yes to proceed	13
Figure 6: Employee selects the question from list.....	14
Figure 7: Employee views the clarification for the question.....	15
Figure 8: Employee clicks Support action	16
Figure 9: Employee clicks Add Prev Emp Exemptions	17
Figure 10: Employee fills the previous employment details.....	18
Figure 11: Employee clicks Save button	19
Figure 12: Confirmation dialog box appears.....	20
Figure 13: Employee fills HRA Details.....	20
Figure 14: Employee click Yes to save the HRA Details.....	21
Figure 15: Employee uploads the attachment	22
Figure 16: Employee fills House Property Income/(Loss) details.....	24
Figure 17: Employee adds another let out column.....	26
Figure 18: Employee fills Housing Loan-Self Occupied Property details	28
Figure 19: Employee selects the required application from list.....	31
Figure 20: Employee fills the Other income application	32
Figure 21: Employee fills the Deduction under life insurance pension scheme	34
Figure 22: Employee fills the Public provident fund details	35
Figure 23: Employee fills the Children education expenses details.....	37
Figure 24: Employee fills the national savings certificate details	38
Figure 25: Employee fills Insurance premium details.....	39
Figure 26: Employee fills the Housing loan principal repayment.....	40
Figure 27: Employee fills the others- post office savings scheme details.....	41

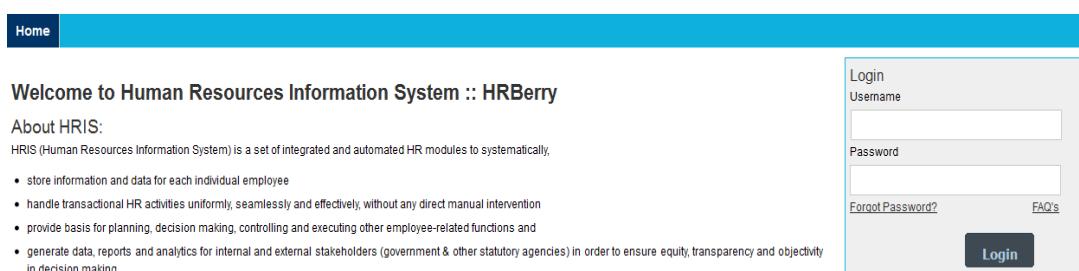
Figure 28: Employee fills the Sukanya Samridhi scheme details	44
Figure 29: Employee fills Accrued NSC Interest details.....	46
Figure 30: Employee fills the Mutual Funds/ULIP details	48
Figure 31: Employee fills Employee contribution towards NPS details	50
Figure 32: Medical Insurance Premium (Sec 80D).....	51
Figure 33: Employee fills Medical Insurance Premium for parents (sec 80D) details	52
Figure 34: Employee fills Medical Insurance Premium paid for senior Citizen (Parents).....	54
Figure 35: Employee fills Medical for handicapped dependents details.....	56
Figure 36: Employee fills handicapped dependent (severe disabilities) details	58
Figure 37: Employee fills Medical for specified diseases details	60
Figure 38: Employee fills Medical for specified Diseases for senior citizen details.....	62
Figure 39: Employee fills the Interest paid on higher education loan details.....	63
Figure 40: Employee fills Deduction for permanent Disability details	64
Figure 41: Employee fills interest on house property details.....	66
Figure 42: Employee views the Investment Proof Submission page.....	67
Figure 43: Employee clicks Yes button.....	68
Figure 44: Employee clicks Generate Form 12BB.....	69
Figure 45: Employee adds the signature in the form.....	71
Figure 46: Employee clicks Upload button.....	72
Figure 47: Confirmation dialog box appears.....	73
Figure 48: Employee clicks Submit Tax Proof button.....	74
Figure 49: Confirmation dialog box appears.....	75

GET STARTED

Login to the application

To login to the application, follow below steps:

1. Open internet browser.
2. Type the address in the **Address** bar, press **Enter** to navigate to **Login** page as shown below.
3. Type **User Name**, **Password**, and then click the **Login** button.



Welcome to Human Resources Information System :: HRBerry

About HRIS:
HRIS (Human Resources Information System) is a set of integrated and automated HR modules to systematically,
• store information and data for each individual employee
• handle transactional HR activities uniformly, seamlessly and effectively, without any direct manual intervention
• provide basis for planning, decision making, controlling and executing other employee-related functions and
• generate data, reports and analytics for internal and external stakeholders (government & other statutory agencies) in order to ensure equity, transparency and objectivity in decision making

Login

Username

Password

Forgot Password? FAQ's

Login

Figure 1: Login page



- ✓ Please make sure that valid credentials are entered for the successful login to the application.

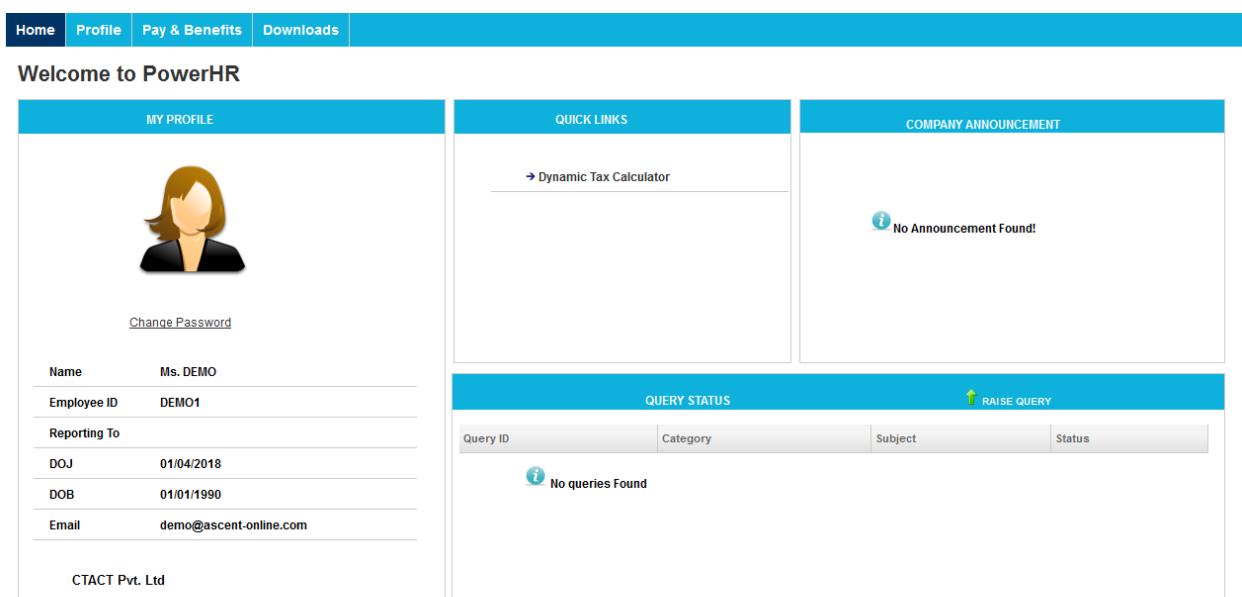
Employee to submit EPSF details in the application

After login to the portal, employee views Welcome to Power HR page

Login to the application, employee must view the various tabs as displayed in the screenshot below.

The navigation of EPSF submission would be as shown below

Pay & Benefits/My Pay >> EPSF (Investment Proofs) Submission



The screenshot shows the PowerHR application interface. At the top, there is a blue header bar with four tabs: Home, Profile, Pay & Benefits, and Downloads. The 'Profile' tab is currently selected. Below the header, the main content area is titled 'Welcome to PowerHR'. It features three main columns: 'MY PROFILE' (containing a placeholder profile picture, a 'Change Password' link, and a table with employee details), 'QUICK LINKS' (containing a link to 'Dynamic Tax Calculator'), and 'COMPANY ANNOUNCEMENT' (containing a message 'No Announcement Found!'). At the bottom, there is a 'QUERY STATUS' section with a table showing 'No queries Found' and a 'RAISE QUERY' button.

Figure 2: Employee clicks EPSF (Investment Proofs) Submission

Employee views **Welcome** page and clicks **EPSF (Investment Proofs) Submission** tab and will be navigated to **Investment Proof Submission** page as shown below.

Investment Proof Submission

GENERAL GUIDELINES

- Update your Tax Savings Details with the details of your actual supporting you have for the Financial Year 2018 - 2019.
- Enter the data accurately and also re-check before final submission.
- Please keep all your investment proofs and supporting documents (soft copy) readily available. These details have to be uploaded under 'Attachments'.
- There are two columns with the heading Declared and Submitted. While the Declared column shows the details of your previous declaration provided for tax processing, you will have to enter the details of your actual tax submissions in Submitted section only.
- Certain Submission sections have Annexures where data has to be filled in the Annexure only. Hence click on 'Click here to update' tab field to enter the details for those sections. Sections like House Property, Children Education, Life Insurance Premium, Sukanya Samridhi Scheme, Mutual Funds have annexures.
- Please use the Rent declaration format for Jan 2019 / Feb 2019 / Mar 2019 which is available under Downloads Menu for future rent payable. Rent Receipt format is also available under 'Download' section.
- The Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than INR 8,333 per month/ INR 100,000 per annum, in the absence of the above, we are afraid to inform you that HRA exemption may not be extended.
- Before finalSubmission, print of Form 12BB is to be taken (which is generated through ascent portal) and is to be signed and uploaded again, post which Final Submission is to be done.
- As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.
- House Property Exemption limited to 2.0 Lakhs for the FY 2018-19 including Self occupied & Let out property.
- Income tax will be calculated based on approved value of investment proofs submitted & all your declaration will be nullified after the cutoff date. Failure to submit the Investment Proofs against declaration will result in higher income tax deduction.
- Please be sure about the accuracy of your submissions before clicking the Final submission ("I Agree and Submit") button as the tool will not allow to make any modifications OR additions in EPSF (Investment Proofs) submission tool.
- For help at section please move the cursor to 'Y' icon for reference.
- Before proceeding to the next section, please click on save button as and when you update & upload the details at each page.

Proof submission status

Proof Submission Upload form 12BB Validation Approval

Pending for proof Submission

Declaration Vs proof submission

Declared	Submitted	Variance
0.0	0.0	0.0

Approval status

Submitted	Approved	Variance
0.0	0.0	0.0

My investments

Start

Figure 3: Employee click the Start button

- Employee views the **Investment Proof Submission** page along with the general guidelines and clicks the **Start** button.
- Two start buttons are available in the **Investment Proof Submission** page as shown above. Employee can click on any of the start button to initiate the submission process.

I. Employee to fill the Personal Details in the application

The screenshot shows the 'Investment Proof Submission' application interface. At the top, there are tabs for 'Personal details', 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', and 'Ded. Under Chapter VI A'. Below these tabs, there is a 'Welcome!' message with instructions for investment proof submission. The 'Personal details' section includes fields for Employee ID (TESTEMP028), Employee Name (TESTEMP 028), Gender, Date of Birth (30/10/2005), PAN, No. of Children (2), Mobile Number (1234567890), and Address (Current Residence) (Bangalore). The 'Family Details' section lists three family members: Anus (Male, Spouse, No, No, 16), Alok (Male, Son, No, No, 0), and Anu (Female, Daughter, Yes, No, 2). There are buttons for 'Add' (labeled 1), 'Delete' (labeled 2), and 'Save' (labeled 3). The top right corner shows summary statistics: Declared Amount 0, Submitted Amount 428537, and Approved Amount 0. Below these are links for 'FAQ', 'Support', and 'Policies'.

Figure 4: Employee fills Personal details

- Once employee clicks the start button, it will be navigated to **Personal details** tab as shown above.
- Employee fills all the relevant and mandatory personal information in the form. It is mandatory to update dependent details to claim Insurance premium/children education expenses.

1. Addition of family member details

Employee clicks **Add** icon to add more than 1 family member details.

2. Deletion of family member details:

Employee clicks **Delete** icon to delete the family member details.

3. Save all the details:

Once employee click save button, a Confirmation dialog box appears, click the **Yes** button to save personal details successfully.



Figure 5: Confirmation dialog box, click Yes to proceed

4. FAQ option

Click **FAQ** option in the right corner of the page as shown in the Figure 4 and can view the frequently asked questions regarding the EPSF.

Investment Proof Submission

Personal details	HRA	Housing loan	Other Income (Bank Interest, etc.)	Ded. Under Sec 80C to 80CCD	Ded. Under Chapter VII A	Declared Amount 0	Submitted Amount 428537	Approved Amount 0																																								
Welcome!!																																																
<ul style="list-style-type: none"> The process of investment proof submission would consume an average time of 30 minutes. Kindly plan your schedules and fill the information accurately to avoid any rejections during verification. Kindly also ensure to submit valid supporting as defined in the Notes to Investment proof document. To enable you submit proofs accurately, a Reason for rejection document on why certain submissions get rejected is made available in downloads section for your reference. As a first step, you will need to check your personal information mentioned below. In case of any discrepancy please raise a query for support. Also, kindly update the editable fields wherever applicable for you. 																																																
Employee ID	TESTEMP028		Employee Name	TESTEMP 028																																												
Gender			Date of Joining																																													
Date of Birth	30/10/2005		PAN																																													
No of Children	2		Mobile Number *	1234567890																																												
Address (Current Residence) *																																																
<input type="text" value="Bangalore"/> ...																																																
Family Details <table border="1"> <thead> <tr> <th>Name*</th> <th>Date of birth*</th> <th>Gender*</th> <th>Relationship*</th> <th>School going*</th> <th>Stay in hostle*</th> <th>Age*</th> <th></th> </tr> </thead> <tbody> <tr> <td>Anup</td> <td>04/11/2002</td> <td>Male</td> <td>Spouse</td> <td>No</td> <td>No</td> <td>16</td> <td></td> </tr> <tr> <td>Alok</td> <td>18/11/2018</td> <td>Male</td> <td>Son</td> <td>No</td> <td>No</td> <td>0</td> <td></td> </tr> <tr> <td>Anu</td> <td>09/11/2016</td> <td>Female</td> <td>Daughter</td> <td>Yes</td> <td>No</td> <td>2</td> <td></td> </tr> <tr> <td><input type="button" value=" "/></td> <td><input type="button" value=" "/></td> <td><input type="button" value=" "/></td> <td><input type="button" value=" - select -"/></td> <td></td> </tr> </tbody> </table>									Name*	Date of birth*	Gender*	Relationship*	School going*	Stay in hostle*	Age*		Anup	04/11/2002	Male	Spouse	No	No	16		Alok	18/11/2018	Male	Son	No	No	0		Anu	09/11/2016	Female	Daughter	Yes	No	2		<input type="button" value=" "/>	<input type="button" value=" "/>	<input type="button" value=" "/>	<input type="button" value=" - select -"/>				
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<input type="button" value=" "/>	<input type="button" value=" "/>	<input type="button" value=" "/>	<input type="button" value=" - select -"/>																																													

Figure 6: Employee selects the question from list

- Employee can select the question from questions list, for which he/she needs clarification as shown in Figure 6

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Welcome!!

The process of investment proof submission would consume an average time of 30 minutes. Kindly plan your schedules and fill the information accurately to avoid any rejections during verification. Kindly also ensure to submit valid supporting as defined in the Notes to Investment proof document.

To enable you submit proofs accurately, a Reason for rejection document on why certain submissions get rejected is made available in downloads section for your reference.

As a first step, you will need to check your personal information mentioned below. In case of any discrepancy please raise a query for support. Also, kindly update the editable fields wherever applicable for you.

Employee ID	TESTEMP028	Employee Name	TESTEMP 028																																
Gender		Date of Joining																																	
Date of Birth	30/10/2005	PAN																																	
No of Children	2	Mobile Number *	1234567890																																
Address (Current Residence) *																																			
Bangalore																																			
Family Details <table border="1"> <thead> <tr> <th>Name*</th> <th>Date of birth*</th> <th>Gender*</th> <th>Relationship*</th> <th>School going*</th> <th>Stay in hostel*</th> <th>Age*</th> <th>+</th> </tr> </thead> <tbody> <tr> <td>Anu</td> <td>04/11/2002</td> <td>Male</td> <td>Spouse</td> <td>No</td> <td>No</td> <td>16</td> <td></td> </tr> <tr> <td>Alok</td> <td>18/11/2018</td> <td>Male</td> <td>Son</td> <td>No</td> <td>No</td> <td>0</td> <td></td> </tr> <tr> <td>Anu</td> <td>09/11/2016</td> <td>Female</td> <td>Daughter</td> <td>Yes</td> <td>No</td> <td>2</td> <td></td> </tr> </tbody> </table>				Name*	Date of birth*	Gender*	Relationship*	School going*	Stay in hostel*	Age*	+	Anu	04/11/2002	Male	Spouse	No	No	16		Alok	18/11/2018	Male	Son	No	No	0		Anu	09/11/2016	Female	Daughter	Yes	No	2	
Name*	Date of birth*	Gender*	Relationship*	School going*	Stay in hostel*	Age*	+																												
Anu	04/11/2002	Male	Spouse	No	No	16																													
Alok	18/11/2018	Male	Son	No	No	0																													
Anu	09/11/2016	Female	Daughter	Yes	No	2																													
<input type="button" value="Save"/>																																			

Questions : Can I claim FD/PPF of my wife's name?

Answer : You can claim for self, spouse & children for PPF. However, you can claim for self towards FD and certificate should mention "Tax saver" for claiming exemptions.

Figure 7: Employee views the clarification for the question

- If employee selects the question, then the answer for that particular question reflects as shown above.

5. Support option

The screenshot shows the 'Investment Proof Submission' page. At the top right, there are buttons for 'Declared Amount' (0), 'Submitted Amount' (428537), and 'Approved Amount' (0). Below these are links for 'FAQ', 'Support' (which is highlighted in yellow), and 'Policies'. A red box highlights the 'Support' section, which contains a search bar with the word 'rent' and a list of related questions:

- Can I claim for both housing loan and HRA exemption?
- Did I have to submit every month rent receipts?
- Can I claim for the HRA exemption for the rent amount which I pay towards my nearby relative?
- Is it mandatory that rent receipts and rental agreement should be on my name?

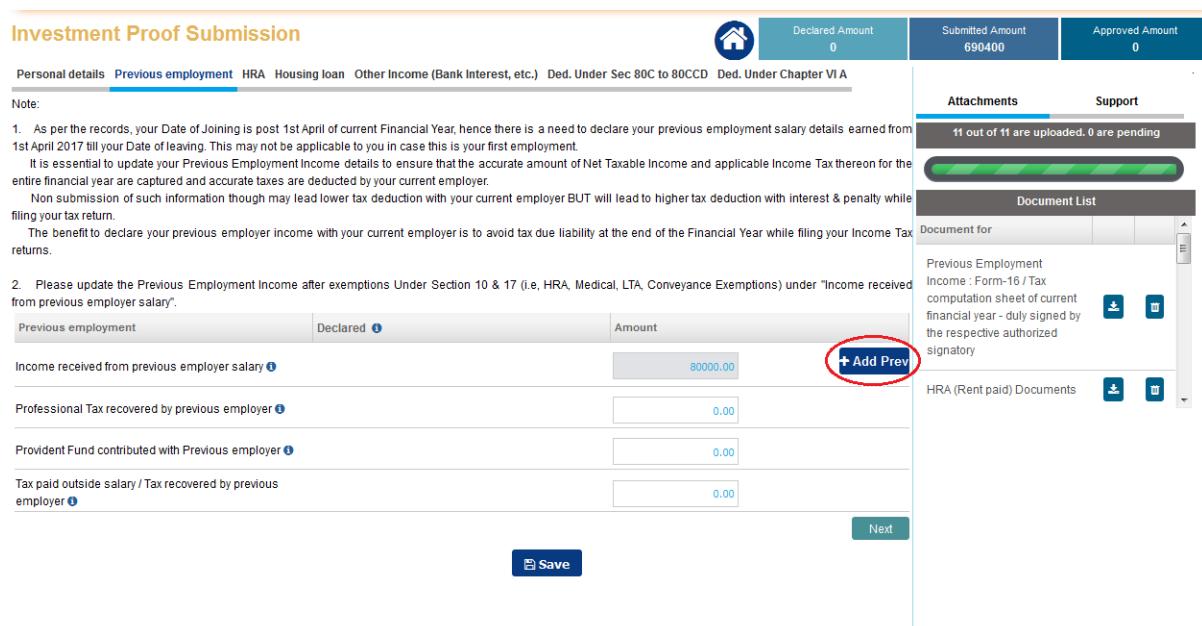
The main form includes sections for 'Personal details' (Employee ID: TESTEMP028, Gender, Date of Birth: 30/10/2005, No of Children: 2, Address: Bangalore), 'Family Details' (listing three family members: Anup, Alok, Anu), and a 'Save' button at the bottom.

Figure 8: Employee clicks Support action

- Employee can click **Support** option to search a question for which he/she needs clarification.
- Employee can type the key word and the result appears as shown above.
- Employee can select the question from the list as shown in Figure 8

Once employee saves the personal details, then the remaining sections such as **Previous Employment, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD and Ded. Under Chapter VI A** auto appears on the screen as shown in Figure 4: Employee fills Personal details

II. Employee to fill Previous Employment tab and fill the Previous employment details in the application



The screenshot shows the 'Investment Proof Submission' application interface. At the top, there are three tabs: 'Personal details', 'Previous employment' (which is selected), 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', and 'Ded. Under Chapter VI A'. Below the tabs, there's a note section with instructions for previous employment declaration. The main area contains input fields for 'Income received from previous employer salary' (set to 80000.00), 'Professional Tax recovered by previous employer' (set to 0.00), 'Provident Fund contributed with Previous employer' (set to 0.00), and 'Tax paid outside salary / Tax recovered by previous employer' (set to 0.00). To the right of these fields is a 'Document List' panel showing 'Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory' and 'HRA (Rent paid) Documents'. At the bottom, there are 'Save' and 'Next' buttons, and a 'Support' section indicating 11 out of 11 attachments are uploaded.

Figure 9: Employee clicks Add Prev Emp Exemptions

- Employee to click **Add Prev. EMP exemptions** button and will get navigated to Previous Employment Section dialog box appears.

Previous Employment Section**Previous Employment Details**

Previous employment Income :

100000|

Less: Section 10 Exemption :

20000.00

Previous Employment Income :

80000.00

save**Figure 10: Employee fills the previous employment details**

- Employee to fill the Previous employment details and close the dialog box

Investment Proof Submission

	Declared Amount	Submitted Amount	Approved Amount
Personal details	0	690400	0
Previous employment			
HRA			
Housing loan			
Other Income (Bank Interest, etc.)			
Ded. Under Sec 80C to 80CCD			
Ded. Under Chapter VI A			

Note:

- As per the records, your Date of Joining is post 1st April of current Financial Year, hence there is a need to declare your previous employment salary details earned from 1st April 2017 till your Date of leaving. This may not be applicable to you in case this is your first employment.
- It is essential to update your Previous Employment Income details to ensure that the accurate amount of Net Taxable Income and applicable Income Tax thereon for the entire financial year are captured and accurate taxes are deducted by your current employer.
- Non submission of such information though may lead lower tax deduction with your current employer BUT will lead to higher tax deduction with interest & penalty while filing your tax return.
- The benefit to declare your previous employer income with your current employer is to avoid tax due liability at the end of the Financial Year while filing your Income Tax returns.

1. Please update the Previous Employment Income after exemptions Under Section 10 & 17 (i.e. HRA, Medical, LTA, Conveyance Exemptions) under "Income received from previous employer salary".

Previous employment	Declared	Amount
Income received from previous employer salary	500	+ Add Prev
Professional Tax recovered by previous employer	400	
Provident Fund contributed with Previous employer	300	
Tax paid outside salary / Tax recovered by previous employer	250	

2. Save button

3. Next button

Figure 11: Employee clicks Save button

- Employee to fill all the details in the respective fields.
- Employee to click **Save** button
- Employee can click the **Next** button to navigate to the **HRA** form.

(OR)

The EPSF tool automatically directs the user to HRA page once the details in previous tab are saved and confirmed

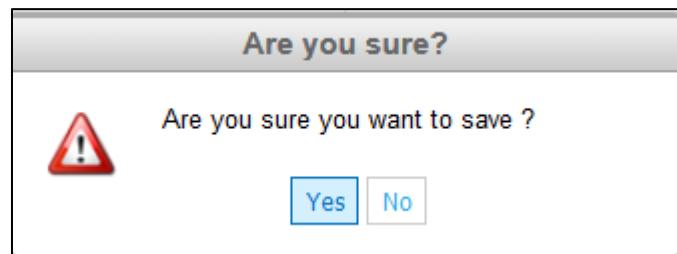


Figure 12: Confirmation dialog box appears

- A confirmation dialog box appears once employee clicks on **Save** button.
Click **Yes** button to proceed further.
- The EPSF tool automatically directs the user to HRA page once the details in previous tab are saved successfully.

III. Employee to fill the HRA details in the application

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Note :
1. The Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than INR 8,333 per month/INR 100,000 per annum. In the absence of the above, we are afraid to inform you that HRA exemption may not be extended.
2. Metro Cities: Metro Cities as per Income Tax Act are Delhi, Mumbai, Kolkata, Chennai. If you are residing in places other than Metro cities, please select 'Others' in the City section. For employees working in Noida, Gurgaon region but living in Delhi, please select 'Delhi' as your residence location.
3. You are required to update the rent details from your joining month onwards only. For HRA exemption prior to your date of joining, you will need to approach your previous employer.
4. Please use the Rent declaration format for Jan 2019 / Feb 2019 / Mar 2019 which is available under Downloads Menu for future rent payable. Rent Receipt format is also available under 'Download' section.
5. Please click on 'Copy to All' after filling the rent details for the first month in case your rent details are same for the entire year.

Month	Declared	Landlord Name	Landlord PAN	Landlord Address	Rented property Address	Rented property City	Rent per month
Apr-18	<input type="checkbox"/>	test	GK001KSHP	102 ETS Block Parmanand	Silicon City	Delhi	130000.00
May-18	<input type="checkbox"/>					Select	0.00
Jun-18	<input type="checkbox"/>					Select	0.00
Jul-18	<input type="checkbox"/>					Select	0.00
Aug-18	<input type="checkbox"/>					Select	0.00
Sep-18	<input type="checkbox"/>					Select	0.00
Oct-18	<input type="checkbox"/>					Select	0.00
Nov-18	<input type="checkbox"/>					Select	0.00
Dec-18	<input type="checkbox"/>					Select	0.00
Jan-19	<input type="checkbox"/>					Select	0.00
Feb-19	<input type="checkbox"/>					Select	0.00
Mar-19	<input type="checkbox"/>					Select	0.00

Next 4

Save 3

Declared Amount: 0

Submitted Amount: 428537

Approved Amount: 0

Attachments: 1 out of 3 are uploaded. 2 are pending

Support: Document List

Document for:

- HRA (Rent paid) Documents (1)
- Public Provident Fund
- Pension Scheme (Sec 80CCG)

Figure 13: Employee fills HRA Details

- Employee views the HRA Page and fills relevant and mandatory information in the form.

2. If employee checks the “**Copy to All**” check box, then the information entered in the single row copies to all the remaining rows.
3. Employee to click the “**save**” button. A confirmation dialog box appears as shown below. Click the **Yes** button to save the details successfully.



Figure 14: Employee click Yes to save the HRA Details

- Employee can click the **Next** button to navigate to the **Housing loan** form.

(OR)

EPSF tool automatically directs the user to Housing loan page once the details in previous tab are saved and confirmed.

Employee to upload the document in the application

- Once the employee has saved the details, he/she will be able to upload the document as shown below

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Show only declared items

House Property Income(Loss) - Let Out Property (Sec 24(b))

Interest on Housing Loan-Self Occupied Property (Sec 24(b))

Quick Jump House Property Income(Loss) - Let Out Property (Sec 24(b))

Note :

- Please use the Annexures 'Click here to update' to enter all relevant details pertaining to House Property.
- As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Let Out

Particulars (Let-out) Property-I

Is the Property a Joint Property

What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes

Lender type

Lender Name

Lender PAN

Lender Address

Rent received type

- Rent received (Please enter Rent received/receivable for the entire year)
- Less Municipal taxes actually paid - 2018-2019
- Net Annual Value(NAV) (1-2)
- Less Standard Deduction (30% of NAV)
- Interest repayment made in the current year
- Pre EMI paid if any in the current year other than regular interest repayment

Do you declare any Pre EMI

Attachments Support

1 out of 3 are uploaded. 2 are pending

Document List

Document for

HRA (Rent paid) Documents

Public Provident Fund

Pension Scheme (Sec 80CCC)

Supporting documents to be uploaded

Document HRA(Rent paid) Documents

Select File

File Password

Maximum file size is 2 MB
Allowed File types are : jpg,jpeg,pdf,doc,docx,zip,php

If more than one document please attach zip file (with all documents)

Figure 15: Employee uploads the attachment

- Click the **Upload** icon to upload the document.
- Click the **Browse** button to select the file from the desired location.
- Provide the password of file and then, click the **Upload** button to upload the document successfully.

IV. Employee to fill Housing loan information in the application

Under Housing loan section, there are 2 Application that need to be filled by an employee.

1. House Property Income/(Loss) - Let Out Property (Sec 24(b))
2. Interest on Housing Loan-Self Occupied Property (Sec 24(b))

Employee to fill House Property Income/(Loss) - Let Out Property (Sec 24(b))

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Show only declared items

House Property Income(Loss) - Let Out Property (Sec 24(3))

Interest on Housing Loan-Self Occupied Property (Sec 24(3))

Quick jump House Property Income(Loss) - Let Out Property (Sec 24(3))

Note :

1. Please use the Annexures "Click here to update" to enter all relevant details pertaining to House Property.
2. As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied, let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Let Out 2

Particulars	(Let-out) Property-I
Is the Property a Joint Property	No
What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes	100
Lender type	Employer
Lender Name	test
Lender PAN	gpa545p
Lender Address	#111000 - CITY
Rent received type	deemed
1. Rent received (Please enter Rent received/receivable for the entire year)	50000
2. Less Municipal taxes actually paid - 2018-2019	3000
3. Net Annual Value(NAV) (1-2)	47000
4. Less Standard Deduction (30% of NAV)	14100
5. Interest repayment made in the current year	500
6. Pre EMI paid if any in the current year other than regular interest repayment	0
Do you declare any Pre EMI	No
Income / Loss from House Property	32400
Total Let Out Property	32400.00

1 2 Save 3 Next 4 Submit & Preview

Note :
1. After the details are filled if the "Let Out Property Income/Loss - (Sec 24(3))" is positive amount then this will be treated as income from House Property and if its Negative (-) treated as Loss from House Property.
2. If house property is partially vacant and partially rented during the year, you will have to declare the actual rent received during the year.
3. Please update the complete rent amount even in case of Joint Property and system will calculate the values on basis of Percentage mentioned under your contribution towards Repayment of Loan.
4. An employee can avail a maximum exemption of Rs. 2,00,000 for both self and let out property.

Figure 16: Employee fills House Property Income/(Loss) details

1. Employee should fill all the relevant and mandatory details in the form, If Employee click the “Save” button, saved details can be edited if required.
2. Employee can click “Add” icon to add another let out column as shown below
3. Employee can click the “Next” button to navigate to the **Interest on Housing Loan-Self Occupied Property (Sec 24(b))** form.

(OR)

The EPSF tool automatically directs the user to Interest on Housing loan – Self occupied property page once the details in previous tab are saved and confirmed

4. If Employee clicks the “Submit & Preview” button, the Investment Proof submission Form will be displayed on screen with the details updated.

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Show only declared items

House Property Income(Loss) - Let Out Property (Sec 24(b))

Quick jump [Interest on Housing Loan-Self Occupied Property (Sec 24(b))]

House Property Income(Loss) - Let Out Property (Sec 24(b))

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Let Out

Particulars

(Let-out) Property-I	(Let-out) Property-II
Is the Property a Joint Property <input type="button" value="select"/>	<input type="button" value="select"/>
What is the Percentage of Your contribution towards Repayment of Loan Applicable only if the above point is Yes <input type="text" value="0"/>	<input type="text" value="0"/>
Lender type <input type="button" value="+ select -"/>	<input type="button" value="+ select -"/>
Lender Name <input type="text"/>	<input type="text"/>
Lender PAN <input type="text"/>	<input type="text"/>
Lender Address <input type="text"/>	<input type="text"/>
Rent received type <input type="button" value="+ select -"/>	<input type="button" value="+ select -"/>
1. Rent received (Please enter Rent received/receivable for the entire year) <input type="text" value="0"/>	<input type="text" value="0"/>
2. Less Municipal taxes actually paid - 2018-2019 <input type="text" value="0"/>	<input type="text" value="0"/>
3. Net Annual Value(NAV) (1-2) <input type="text" value="0"/>	<input type="text" value="0"/>
4. Less Standard Deduction (30% of NAV) <input type="text" value="0"/>	<input type="text" value="0"/>
5. Interest repayment made in the current year <input type="text" value="0"/>	<input type="text" value="0"/>
6. Pre EMI paid if any in the current year other than regular interest repayment <input type="text" value="0"/>	<input type="text" value="0"/>
Do you declare any Pre EMI <input type="button" value="+ select -"/>	<input type="button" value="+ select -"/>
Income / Loss from House Property <input type="text" value="0"/>	<input type="text" value="0"/>
Total Let Out Property: <input type="text" value="0.00"/>	

Note:

- After the details are filled if the "Let Out Property Income/Loss - (Sec 24(b))" is positive amount then this will be treated as income from House Property and if its Negative (-) treated as Loss from House Property.
- If house property is partially vacant and partially rented during the year, you will have to declare the actual rent received during the year.
- Please update the complete rent amount even in case of Joint Property and system will calculate the values on basis of Percentage mentioned under your contribution towards Repayment of Loan.
- An employee can avail a maximum exemption of Rs. 2,00,000 for both self and let out property.

Figure 17: Employee adds another let out column

**Note:**

- ✓ Only 3 let out columns can be added.
- ✓ If the employee selects **Yes** option for the particulars mentioned below, then an additional field appears on the screen. Employee need to fill the details for the additional fields as well.

Particulars:

- Is the Property a Joint Property
- Rent received type
- Do you declare any Pre EMI

Employee to fill Interest on Housing Loan-Self Occupied Property (Sec 24(b)) details

Investment Proof Submission

Personal details	HRA	Housing loan	Other Income (Bank Interest, etc.)	Ded. Under Sec 80C to 80CCD	Ded. Under Chapter VI A	Declared Amount	Submitted Amount	Approved Amount
						0	428537	0

Show only declared items

House Property Income(Loss) - Let Out Property (Sec 24(3))

Interest on Housing Loan-Self Occupied Property (Sec 24(3))

Quick jump: House Property Income(Loss) - Let Out Property (Sec 24(3)) [View](#)

Note :

1. Please use the Annexures 'Click here to update' to enter all relevant details pertaining to House Property.
2. As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
455.00	200	200	Test

Self Occupied

1. Is the Property a Joint Property? Yes
2. What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes? 50
3. Loan Sanctioned year 2018
4. Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2019) 01/2019
5. Lender type Others
7. Lender Name
8. Lender PAN 12345
9. Lender Address
10. Interest repayment made in the current year
11. Pre EMI paid if any in the current year other than regular interest repayment
- Do you have any Pre EMI pertaining to the previous FY's
17. Do you wish to submit the rent paid details ?

Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999
If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-
Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-

Declaration for claiming benefits on Joint Property
This is to inform the concerned authorities that the property mentioned is a joint property, however the other owner of the property is not enjoying any tax benefits.
on the same and has granted me permission to avail the tax benefits of the same.

Self Occupied

Name of the Joint Owner

PAN No of the Joint Owner

Relationship with Joint Owner

Figure 18: Employee fills Housing Loan-Self Occupied Property details

1. Employee fills all the relevant and mandatory details in the form, If Employee click the **save** button, saved details can be edited if required.

2. If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated
3. Employee clicks the **Next** button to navigate to the **Other Income (Bank Interest, etc.)** form.

(OR)

The EPSF tool automatically directs the user to Other Income (Bank Interest, etc.) page once the details in previous tab are saved and confirmed

4. Employee clicks the **Previous** button to navigate to the previous form.

- **Declared Amount:** Declared Amount field on top right side displays the amount which employee has entered.
- **Proof Submitted:** Proof Submitted field on top right side displays the amount for which the proofs are submitted.
- **Approved:** Approved field on top right side displays the amount which has been approved.
- **Remarks:** Remarks field on top right side displays the remarks.

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Quick jump [House Property Income/(Loss) - Let Out Property (Sec 24(b))]

Note :

1. Please use the Annexures 'Click here to update' to enter all relevant details pertaining to House Property.
2. As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	14327.00	0.00	

Let Out

Particulars (Let-out) Property-I

Is the Property a Joint Property : Yes

What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes : 50

Lender type : Financial Institution

Lender Financial Institution Name : Indian Bank

Lender Name : 22

Attachments Support
8 out of 9 are uploaded. 1 are pending

Document List

Document for Pension Scheme (Sec 80CCC)

HRA (Rent paid) Documents

House Property Income/(Loss) - Let Out (Possession Certificate,Loan)

Employee to fill the specific application through the quick jump option

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Quick jump [House Property Income/(Loss) - Let Out Property (Sec 24(b))]

House Property Income/(Loss) - Let Out Property (Sec 24(b))

Note :

1. Please use the Annexures 'Click here to update' to enter all relevant details pertaining to House Property.
2. As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is completed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	14327.00	0.00	

Let Out

Particulars (Let-out) Property-I

Is the Property a Joint Property : Yes

What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes : 50

Lender type : Financial Institution

Lender Financial Institution Name : Indian Bank

Lender Name : 22

Attachments Support
8 out of 9 are uploaded. 1 are pending

Document List

Document for Scheme (Sec 80CCC)

HRA (Rent paid) Documents

House Property Income/(Loss) - Let Out (Possession Certificate,Loan)

Figure 19: Employee selects the required application from list

- Employee can also jump into the required application by selecting the application from the list as shown above and the selected application appears on the screen

V. Employee to fill the Other Income (Bank Interest, etc.) details in the application

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VIA

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Other Income (Bank Interest, etc.)

1. Interest on deposits in saving accounts (80TTA)
 - a. Savings Bank Interest : 30
 - b. Post Office Savings Account Interest : 20
 - Post Office Savings Account type: Single: Joint:
 - Total Interest : 50
 - Less: Exemption U/s 80TTA : 50 : 0

Note : If Post Office Savings Account is Single Account then exemption is INR 3500/- and if it is Joint Account then exemption is INR 7,000/- Over all exemption under section 80TTA is INR 10,000/-
2. Accrued NSC Interest : 20
3. Interest on Fixed deposit : 25
4. If any other Income :
5. Tax recovered on other Income :

Total : 45

Save Submit & Preview Previous 4 1 2 Next 3

Figure 20: Employee fills the Other income application

- Employee fills all the relevant and mandatory details in the form, If Employee click the **save** button, saved details can be edited if required.

2. If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated
3. Employee clicks the **Next** button to navigate to the Ded. Under Sec 80C to 80CCD form.

(OR)

The EPSF tool automatically directs the user to Ded. Under Sec 80C to 80CCD page once the details in previous tab are saved and confirmed

4. Employee clicks the **Previous** button to navigate to the previous form

VI. Employee to fill the Ded. Under Sec 80C to 80CCD details in the application

Under **Ded. Under Sec 80C to 80CCD** section, there are 11 applications as mentioned below which employee can fill.

1. Deduction under Life Insurance Pension Scheme (Sec 80CCC)
2. Public Provident Fund
3. Children Education Expenses
4. National Savings Certificate (NSC)
5. Insurance Premium
6. Housing Loan Principal Repayment
7. Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years
8. Sukanya Samriddhi Scheme
9. Accrued NSC Interest

10. Mutual Funds / ULIP

11. Employees contribution towards NPS

Employee to fill Deduction under Life Insurance Pension Scheme (Sec 80CCC) form

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Note:
1. Photo Copy of premium receipt – Only current year receipt eligible (Ex: - LIC/UTI Pension Fund, ICICI PRU Forever Life/ Tata AIG Easy Retire Annuity Plan).

Buttons:
1 Save
2 Submit & Preview
3 Next
4 Previous

Figure 21: Employee fills the Deduction under life insurance pension scheme

- Employee to fill all the relevant and mandatory details in the form, If Employee click the **save** button, saved details can be edited if required.
- If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated
- Employee clicks the **Next** button to navigate to the **Public Provident Fund** form.

(OR)

The EPSF tool automatically directs the user to Public Provident Fund page once the details in previous tab are saved and confirmed

4. Employee to click the **Previous** button to navigate to the previous form

Employee to fill the Public Provident Fund details in the form

Investment Proof Submission

Personal details	HRA	Housing loan	Other Income (Bank Interest, etc.)	Ded. Under Sec 80C to 80CCD	Ded. Under Chapter VI A	Declared Amount 0	Submitted Amount 428537	Approved Amount 0
Show only declared items <input type="checkbox"/>							Attachments Support	
Employees Provident Fund							0 out of 0 are uploaded. 0 are pending	
Voluntary Provident Fund							Document List	
Deduction under Life Insurance Pension Scheme (Sec 80CCC)							Document for	
Public Provident Fund								
Children Education Expenses								
National Savings Certificate (NSC)								
Insurance Premium								
Housing Loan Principal Repayment								
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years								
Sukanya Samridhi Scheme								
Accrued NSC Interest								
Mutual Funds / ULIP								

Quick jump: House Property Income/(Loss) - Let Out Property (Sec 24(b))

Declared Proof Submitted Approved Remarks

Public Provident Fund : 1

2 Save Submit & Preview 3

Note:
1. Photo Copy of passbook along with the cover page showing investors name and Photo Copy of challan duly acknowledged by the Bank.
2. Contribution to an account standing in the name of the employee/spouse or children is allowed.

Previous Next 4

Figure 22: Employee fills the Public provident fund details

1. Employee to fill all the relevant and mandatory details in the form, If Employee click the **save** button, saved details can be edited if required.
2. If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated

3. Employee to click the **Next** button to navigate to the **Children Education Expenses** form.

(OR)

The EPSF tool automatically directs the user to Children Education Expenses page once the details in previous tab are saved and confirmed

4. Employee clicks the **Previous** button to navigate to the previous form

Employee fills the Children Education Expenses details in the form

Investment Proof Submission

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Children Education Expenses

Dependant Name	No of Documents	Fees Date	Amount Paid
-select-	2	30/11/2023	20000
-select-	3	16/11/2023	40000
-select-	1	28/11/2023	4000
-select-	2	28/11/2023	4000

Note:

1. Maximum 2 children fees can be allowed.
2. Tuition fees does not include any development fees or donation or payment of similar nature.
3. Tuition fees belongs to current Financial Year only.

Attachments **Support**
0 out of 0 are uploaded. 0 are pending
Document List

Document for

Buttons: Save, Submit & Preview, Next

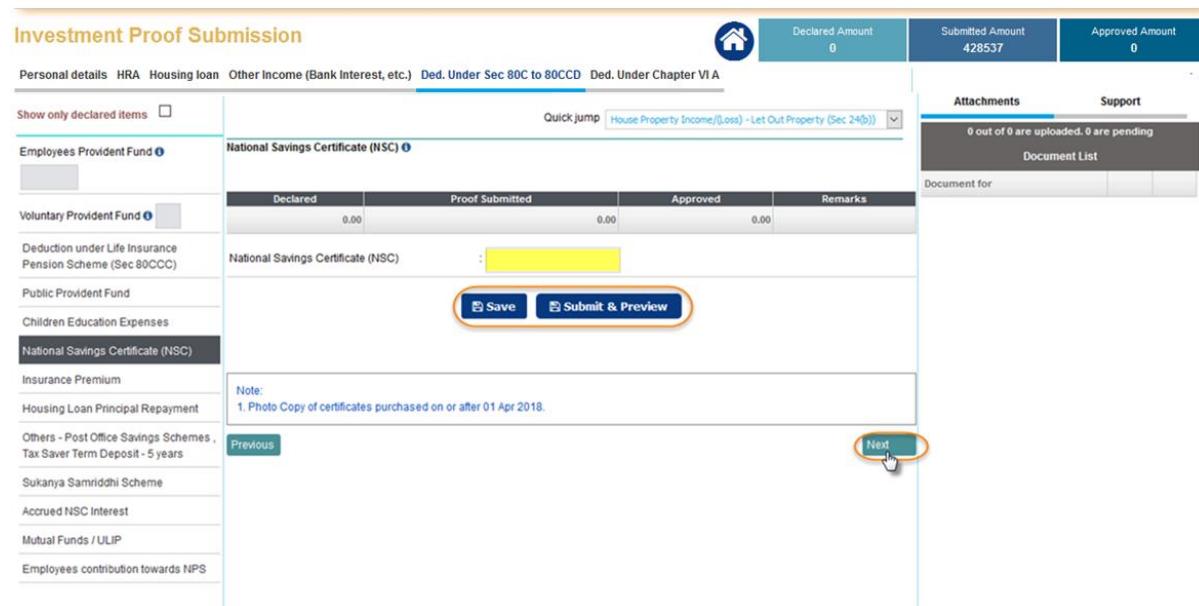
Figure 23: Employee fills the Children education expenses details

1. Employee to fill the Dependent name, No. of documents, Fees date and Amount value in the respective textbox.
2. Employee to click the **save** button to save all the details and saved details can be edited if required
3. If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated
4. Employee to click the **Next** button to navigate to the **National Savings Certificate (NSC)** form.

(OR)

The EPSF tool automatically directs the user to **National Savings Certificate (NSC)** page once the details in previous tab are saved and confirmed

Employee fills the National saving certificate details in the form



Investment Proof Submission

Declared Amount 0 Submitted Amount 428537 Approved Amount 0

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VIA

Show only declared items

Employees Provident Fund

Voluntary Provident Fund

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Public Provident Fund

Children Education Expenses

National Savings Certificate (NSC)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

National Savings Certificate (NSC) :

Save **Submit & Preview**

Note:
1. Photo Copy of certificates purchased on or after 01 Apr 2018.

Attachments Support
0 out of 0 are uploaded. 0 are pending
Document List

Document for

Previous Next

Figure 24: Employee fills the national savings certificate details

1. Employee to type the **National savings certificate** value in the text box.
2. Employee to click the **Save** button to save the details or click the **submit and preview** button to submit the details
3. If Employee clicks the **Submit & Preview** button, the Investment Proof submission Form will be displayed on screen with the details updated
4. Employee to click the **Next** button to navigate to the **Insurance Premium** form.

(OR)

The EPSF tool automatically directs the user to Insurance Premium page once the details in previous tab are saved and confirmed

- Employee to click the “Previous” button to navigate to the previous form.

Employee to fill Insurance Premium details in the form

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) **Ded. Under Sec 80C to 80CCD** Ded. Under Chapter VI A

Show only declared items

Employees Provident Fund

Voluntary Provident Fund

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Public Provident Fund

Children Education Expenses

National Savings Certificate (NSC)

Insurance Premium

Housing Loan Principal Repayment

Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years

Sukanya Samridhi Scheme

Accrued NSC Interest

Mutual Funds / ULIP

Employees contribution towards NPS

Insurance Premium

Life Insurance premium – Ded. Thro. Payroll 0

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Life Insurance Premium

Dependent Name	Policy Number	Premium Type	Relationship	Date	No. of Documents	Amount
TESTEMP 027	123	Quarterly	Self	20/11/2018	2	3000
<input type="button" value="select -"/>						

Declaration for pending Life Insurance due

Dependent Name	Policy Number	Premium Type	Relationship	Date	No. of Documents	Amount
TESTEMP 027	345	Quarterly	Self	29/11/2018	4	5000

Note:

- 1. Life Insurance Premium paid towards dependents other than Spouse, Children cannot be considered for exemption. As per the provisions of Section 80C of the Income Tax Act 1961
- 2. Late fees cannot be considered
- 3. Declarations for premium due prior to Jan 2018 will not be considered
- 4. Deduction will be allowed only for premiums upto a maximum of 10% of the sum assured for policy issued on or after April 1, 2012. In case of policy issued before March 31, 2012, deduction will be allowed only for premiums upto a maximum of 20% of the sum assured.

Attachments 0 out of 0 are uploaded. 0 are pending
Document List Document for

Support

Quick jump House Property Income/(Loss) - Let Out Property (Sec 24(b))

Declared Amount 0 **Submitted Amount** 428537 **Approved Amount** 0

1 **2** **3** **4** **5**

Figure 25: Employee fills Insurance premium details

1. Employee to fill the Dependent name, policy number, premium type, relationship date, No. of documents and amount value in the respective textbox.
2. Employee to click **Add** icon to add one more row to add the life insurance premium.
3. Click **Delete** icon to delete the rows from the form.
4. Employee to click the **Save** button to save the details or click the **submit and preview** button to submit the details
5. Employee to click the **Next** button to navigate to the **Housing Loan principal repayment** form.

(OR)

The EPSF tool automatically directs the user to Housing Loan principal repayment page once the details in previous tab are saved and confirmed



Note:

✓ Only 11 rows can be added in the form.

Employee to fill Housing Loan Principal Repayment details

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	
Housing Loan Principal Repayment : <input type="text" value=""/>			

Attachments 0 out of 0 are uploaded. 0 are pending
Support
Document List
Document for

Note:

1. Photo copy of the Latest Certificate Issued by the Bank/financial institution/others (Mentioning breakup of Principal amount paid/payable during the financial year 2018-19).
2. Property Registration fee / Stamp duty towards Registration of Property can be claimed for exemption.

Previous Next

Figure 26: Employee fills the Housing loan principal repayment

1. Employee to fill the Housing loan principal repayment value in the text box
2. Employee to click the **Save** button to save the details or click the **submit and preview** button to submit the details
3. Employee to click the **Next** button to navigate to the **Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years** form.

(OR)

The EPSF tool automatically directs the user to **Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years** page once the details in previous tab are saved and confirmed

Employee to fill others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years details

Investment Proof Submission											
Personal details	HRA	Housing loan	Other Income (Bank Interest, etc.)								
Ded. Under Sec 80C to 80CCD	Ded. Under Chapter VI A										
Declared Amount	0	Submitted Amount	428537								
Approved Amount	0										
<input type="checkbox"/> Show only declared items Quick jump: House Property Income/(Loss) - Let Out Property (Sec 24(b))											
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years											
<table border="1"> <thead> <tr> <th>Declared</th> <th>Proof Submitted</th> <th>Approved</th> <th>Remarks</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td></td> </tr> </tbody> </table>				Declared	Proof Submitted	Approved	Remarks	0.00	0.00	0.00	
Declared	Proof Submitted	Approved	Remarks								
0.00	0.00	0.00									
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years : <input style="background-color: yellow; width: 100px; height: 20px;" type="text"/>											
<input type="button" value="Save"/> <input type="button" value="Submit & Preview"/>											
Note: 1. Tax Saver Fixed deposit having Five year's term is eligible for the tax exemption. Copy of the FD receipts should be submitted. Tax Saver Fixed deposits issued by banks/post office are eligible for the exemption.											
<input type="button" value="Previous"/>		<input type="button" value="Next"/>									

Figure 27: Employee fills the others- post office savings scheme details

1. Employee to fill **the others- post office savings scheme, Tax Saver Term Deposit - 5 years** value in the text box.
2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
3. Employee to click the **Next** button to navigate to the **Sukanya Samridhi Scheme** form.

(OR)

The EPSF tool automatically directs the user to Sukanya Samridhi Scheme page once the details in previous tab are saved and confirmed

Employee to fill the Sukanya Samriddhi Scheme details in the form

The screenshot shows the 'Investment Proof Submission' page. At the top, there are summary boxes for Declared Amount (0), Submitted Amount (428537), and Approved Amount (0). Below this is a navigation bar with links for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VI A. A 'Quick jump' dropdown is set to 'House Property Income/(Loss) - Let Out Property (Sec 24(b))'. On the left, a sidebar lists deduction categories: Employees Provident Fund, Voluntary Provident Fund, Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC), Insurance Premium, Housing Loan Principal Repayment, Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years, Sukanya Samriddhi Scheme (selected), Accrued NSC Interest, Mutual Funds / ULIP, and Employees contribution towards NPS. The main content area is titled 'Sukanya Samriddhi Scheme'. It has a table for 'Please fill the dependent info' with columns for Declared, Proof Submitted, Approved, and Remarks. Two rows are shown: one with a dependent name (100256714711), account number (300000), and amount invested (0.00); another row below it with empty fields. To the right of the table are 'Delete' and 'Add' icons. Below the table are 'Save' and 'Submit & Preview' buttons. A note at the bottom states: 'Note: A depositor can open and operate only one account in the name of a girl child under the scheme rules'. Navigation buttons 'Previous' and 'Next' are at the bottom right, with 'Next' being circled in orange.

Figure 28: Employee fills the Sukanya Samriddhi scheme details

1. Employee to fill the Dependent name, account number and amount invested value..

2. Employee can add one more row by clicking on the Add icon to add another dependent name, account number and amount invested value.

3. Employee can delete the row by clicking on the **Delete** icon.
4. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
5. Employee to click the **Next** button to navigate to the **Accrued NSC Interest** form.

(OR)

The EPSF tool automatically directs the user to **Accrued NSC Interest** page once the details in previous tab are saved and confirmed.

Employee to fill the Accrued NSC Interest details in the form

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) **Ded. Under Sec 80C to 80CCD** Ded. Under Chapter VIA

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

NSC Form

Certificate No	Date of Purchase	Amount Invested	Accrued Interest
123	30/03/2023	200000	100000

Actions:

Buttons: Save, Submit & Preview, Next

Figure 29: Employee fills Accrued NSC Interest details

1. Employee to fill the relevant and mandatory details in the form.
2. Employee can add one more row by clicking on the **Add** icon to add another NSC form.
3. Employee can delete the row by clicking on the **Delete** icon.

Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details

4. Employee to click the **Next** button to navigate to the **Mutual Funds/ULIP** form.

(OR)

The EPSF tool automatically directs the user to **Mutual Funds/ULIP** page once the details in previous tab are saved and confirmed

Employee to fill the Mutual Funds / ULIP details in the form

Investment Proof Submission

		Declared Amount 0	Submitted Amount 428537	Approved Amount 0												
Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A																
<input type="checkbox"/> Show only declared items																
Mutual Funds / ULIP																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Declared</th> <th style="width: 25%;">Proof Submitted</th> <th style="width: 25%;">Approved</th> <th style="width: 25%;">Remarks</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td></td> </tr> </tbody> </table>					Declared	Proof Submitted	Approved	Remarks	0.00	0.00	0.00					
Declared	Proof Submitted	Approved	Remarks													
0.00	0.00	0.00														
Mutual Funds Form <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name of Investment</th> <th>Date of Investment</th> <th>Amount Invested</th> <th></th> </tr> </thead> <tbody> <tr> <td>test</td> <td>21/03/20 </td> <td>400000</td> <td> </td> </tr> <tr> <td></td> <td></td> <td></td> <td> </td> </tr> </tbody> </table>					Name of Investment	Date of Investment	Amount Invested		test	21/03/20	400000					
Name of Investment	Date of Investment	Amount Invested														
test	21/03/20	400000														
Declaration for pending SIP due <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name of Investment</th> <th>Date of Investment</th> <th>Amount Invested</th> <th></th> </tr> </thead> <tbody> <tr> <td>test</td> <td>27/03/20 </td> <td>30000</td> <td></td> </tr> </tbody> </table>					Name of Investment	Date of Investment	Amount Invested		test	27/03/20	30000					
Name of Investment	Date of Investment	Amount Invested														
test	27/03/20	30000														
<input type="button" value="Save"/> <input type="button" value="Submit & Preview"/>																
<small>Note:</small> <ol style="list-style-type: none"> Only tax free Mutual Funds will be exempted. Declarations prior to Jan 2019 will not be considered. The Mutual Funds - Declaration available under this section needs to be used only by those employees who have invested in Mutual Funds through a Systematic investment plan (SIP). Employees have to submit the proof of payments made through SIP till Dec / Jan if the declaration (pertaining to pending payments of Jan/Feb/March) needs to be considered for tax computation. If proof of payments through SIP till Dec / Jan are not enclosed the declaration will be nullified. 																
<input type="button" value="Previous"/>		<input type="button" value="Next"/>														

Figure 30: Employee fills the Mutual Funds/ULIP details

- Employee to fills all the relevant and mandatory details in the form.

2. Employee can add one more row by clicking on the **Add** icon to add another Mutual fund details.
3. Employee can delete the row by clicking on the **Delete** icon.
4. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
5. Employee to click the **Next** button to navigate to the **Employees contribution towards NPS** form.

(OR)

The EPSF tool automatically directs the user to Employees contribution towards NPS page once the details in previous tab are saved and confirmed

Employee to fill the Employees contribution towards NPS details in the form

Investment Proof Submission

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Show only declared items

Employees Provident Fund [?](#)

Voluntary Provident Fund [?](#)

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Public Provident Fund

Children Education Expenses

National Savings Certificate (NSC)

Insurance Premium

Housing Loan Principal Repayment

Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years

Sukanya Samridhi Scheme

Accrued NSC Interest

Mutual Funds / ULIP

Employees contribution towards NPS

Employees contribution towards NPS [?](#)

Employer NPS – Ded. Thro. Payroll 0

Employee NPS – Ded. Thro. Payroll 0

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Employees contribution towards NPS : 120000

Save **Submit & Preview**

Note:
1. Photo Copy of contribution made towards National pension scheme in current FY.
2. An amount of Rs. 1.5 lakh is available to claim under section 80 CCD (1A) and an additional benefit of Rs. 50,000 is available under section 80 CCD (1B) through investments under National Pension Scheme.

Previous Next

Figure 31: Employee fills Employee contribution towards NPS details

- Employee to fill the Employee contribution towards NPS value in textbox.
- Employee to click the **Save** button to save the details successfully or click **submit and preview** button to submit the details

3. Employee to click the **Next** button to navigate to the **Ded under chapter - VIA** form.

(OR)

The EPSF tool automatically directs the user to Ded. Under chapter - VIA page once the details in previous tab are saved and confirmed

VII. Employee to fill the Ded. Under Chapter VI A section in application

Under Ded. Under Chapter VI A section, there are 10 applications as mentioned below which employee can fill.

1. Medical Insurance Premium (Sec 80D)
2. Medical Insurance Premium for parents (sec 80D)
3. Medical Insurance Premium paid for senior Citizen (Parents)
4. Medical for Handicapped Dependents (Sec 80DD)
5. Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
6. Medical for Specified Diseases (Sec 80DDB)
7. Medical for Specified Diseases for Senior Citizen (Sec 80DDB)
8. Interest Paid on Higher Education Loan (Sec 80E)
9. Deduction for Permanent Disability (Sec 80U)
10. Interest on House Property - Additional Exemption (Sec 80EE)

Employee to fill Medical Insurance Premium (Sec 80D) details in the form

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	690400	0

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD **Ded. Under Chapter VI A**

Show only declared items

Medical Insurance Premium (Sec 80D)

Medical Insurance Premium for parents (sec 80D)

Medical Insurance Premium paid for senior Citizen (Parents)

Medical for Handicapped Dependents (Sec 80DD)

Medical for Handicapped Dependents (severe disability) (Sec 80 DD)

Medical for Specified Diseases (Sec 80DB)

Medical for Specified Diseases for Senior Citizen (Sec 80DDB)

Interest Paid on Higher Education Loan (Sec 80E)

Deduction for Permanent Disability (Sec 80U)

Interest on House Property - Additional Exemption

Quick jump [House Property Income/\(Loss\) - Let Out Property \(Sec 24\(b\)\)](#)

Medical Insurance Premium (Sec 80D)

Medical Insurance Premium(Sec 80D) Ded. Thro. Payroll

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical Insurance Premium

Dependent Name	Policy Number	Premium Type	Relationship	Date	No. of Documents	Amount
- select -	123	Quarterly	- select -	27/03/2017	2	56600

Save **Submit & Preview**

Note:

1. Photocopy of premium paid receipt which is current FY.
2. Maximum Premium amount allowed for deduction from taxable income U/s 80D is Rs 25,000 for Self / Spouse / Children.
3. Deduction is eligible only if premium paid through any mode other than cash.
4. Please do not enter the medical top up premium amount if it was deducted through Payroll. The tax benefit will be calculated automatically on this.

Next

Figure 32: Medical Insurance Premium (Sec 80D)

1. Employee to fill all the relevant and mandatory details in the form.
2. Employee to click the **Save** button to save the details successfully or click **submit and preview** button to submit the details

3. Employee to click the **Next** button to navigate to the **Medical Insurance premium for parents (80D)** form.

(OR)

The EPSF tool automatically directs the user to Medical Insurance premium for parents (80D) page once the details in previous tab are saved and confirmed

Employee to fill Medical Insurance Premium for parents (sec 80D) details in form

The screenshot shows the 'Investment Proof Submission' interface. On the left, there's a sidebar with various tax deduction categories like Personal details, Previous employment, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VI A. The 'Medical Insurance Premium for parents (sec 80D)' option is selected. The main panel displays the 'Medical Insurance Premium for parents (sec 80D)' section. It includes a table for 'fill the dependent info' with columns for Declared, Proof Submitted, Approved, and Remarks. Below this is another table for 'Medical Insurance Premium for parents' with columns for Dependent Name, Policy Number, Premium Type, Relationship, Date, No. of Documents, and Amount. At the bottom of the main panel, there are 'Save' and 'Submit & Preview' buttons, both of which have a yellow border and are being clicked by a cursor. To the right of the main panel, there are sections for 'Attachments' (0 out of 0 uploaded) and 'Support' (Document List). At the very bottom right of the main panel, there is a 'Next' button.

Figure 33: Employee fills Medical Insurance Premium for parents (sec 80D) details

1. Employee to fill all the relevant and mandatory details in the form
2. Employee can add one more row by clicking on the **Add** icon to add another Mutual fund details.
3. Employee can delete the row by clicking on the **Delete** icon.
4. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
5. Employee to click the **Next** button to navigate to the **Medical Insurance Premium paid for senior Citizen (Parents)** form.

(OR)

The EPSF tool automatically directs the user to **Medical Insurance Premium paid for senior Citizen (Parents)** page once the details in previous tab are saved and confirmed

Employee to fill Medical Insurance Premium paid for senior Citizen (Parents) details

The screenshot shows the 'Investment Proof Submission' interface. At the top, there are tabs for 'Personal details', 'Previous employment', 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', 'Ded. Under Chapter VIA', and 'House Property Income/(Loss) - Let Out Property (Sec 24(0))'. The 'Ded. Under Chapter VIA' tab is selected.

In the main area, under 'Medical Insurance Premium paid for senior Citizen (Parents)', there is a table with columns 'Declared', 'Proof Submitted', 'Approved', and 'Remarks'. The 'Declared' column shows '0.00', 'Proof Submitted' shows '0.00', 'Approved' shows '0.00', and 'Remarks' is empty. Below this table is another table for 'Medical Insurance Premium for senior Citizen (Parents)' with columns 'Dependent Name', 'Policy Number', 'Premium Type', 'Relationship', 'Date', 'No. of Documents', and 'Amount'. A note at the bottom of the page provides instructions for submitting the premium paid receipt.

Figure 34: Employee fills Medical Insurance Premium paid for senior Citizen (Parents)

1. Employee to fill all the relevant and mandatory details in the form

2. Employee can add one more row by clicking on the Add icon to add another Mutual fund details.

3. Employee can delete the row by clicking on the **Delete** icon.
4. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details.
5. Employee to click the **Next** button to navigate to the **Medical Insurance Medical for Handicapped Dependents (Sec 80DD)** form.

(OR)

The EPSF tool automatically directs the user to Medical Insurance Medical for Handicapped Dependents (Sec 80DD) page once the details in previous tab are saved and confirmed

Employee to fill Medical for Handicapped Dependents (Sec 80DD) details in form

The screenshot shows the 'Investment Proof Submission' interface. At the top, there are summary boxes for 'Declared Amount' (0), 'Submitted Amount' (690400), and 'Approved Amount' (0). Below this is a navigation bar with links for 'Personal details', 'Previous employment', 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', 'Ded. Under Chapter VIA', 'Attachments', and 'Support'. A 'Quick jump' dropdown is set to 'House Property Income/(Loss) - Let Out Property (Sec 24(b))'. The main content area is titled 'Medical for Handicapped Dependents (Sec 80DD)' with a help icon. It contains a table with columns 'Declared', 'Proof Submitted', 'Approved', and 'Remarks'. The 'Declared' column shows '0.00'. Below the table is a note section with a 'Note:' heading and three points about deduction rules. At the bottom are 'Save' and 'Submit & Preview' buttons, with 'Save' being highlighted by a yellow oval. Navigation buttons 'Previous' and 'Next' are also visible.

Figure 35: Employee fills Medical for handicapped dependents details

1. Employee to fill the Medical for handicapped Dependents (Sec 80DD) value in form.

2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details

3. Employee to click the **Next** button to navigate to the **Medical Insurance Medical for Handicapped Dependents (severe disability) (Sec 80 DD)** form.

(OR)

The EPSF tool automatically directs the user to **Medical Insurance Medical for Handicapped Dependents (severe disability) (Sec 80 DD)** page once the details in previous tab are saved and confirmed

Employee to fill Medical for Handicapped Dependents (severe disability) (Sec 80 DD) details

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	690400	0

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD **Ded. Under Chapter VIA**

Show only declared items

Medical Insurance Premium (Sec 80D)

Medical Insurance Premium for parents (sec 80D)

Medical Insurance Premium paid for senior Citizen (Parents)

Medical for Handicapped Dependents (Sec 80DD)

Medical for Handicapped Dependents (severe disability) (Sec 80 DD)

Medical for Specified Diseases (Sec 80DDB)

Medical for Specified Diseases for Senior Citizen (Sec 80DDB)

Interest Paid on Higher Education Loan (Sec 80E)

Deduction for Permanent Disability (Sec 80U)

Interest on House Property - Additional Exemption

Quick jump [House Property Income/\(Loss\) - Let Out Property \(Sec 24\(b\)\)](#)

Medical for Handicapped Dependents (severe disability) (Sec 80 DD)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical for Handicapped Dependents (severe disability) (Sec 80 DD) :

Save **Submit & Preview**

Note:

1. Deduction in respect to any expenditure incurred for the medical treatment (including nursing), training and rehabilitation of a dependent being a person with disability
2. For severe disability (Disability over 80%) a deduction of Rs 125,000/- will be eligible.
3. Certificate issued by a medical authority (who is a physician, a surgeon, an oculist or a psychiatrist) which is valid for 2018-19 financial year in the Form 10-IA. If the certificate is not valid for FY 2018-19, the exemption will not be given.

Previous **Next**

Figure 36: Employee fills handicapped dependent (severe disabilities) details

1. Employee to fill the Medical for Handicapped Dependents (Severe disability) (Sec 80DD) value in the form.
2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Employee to click the **Next** button to navigate to the **Medical for Specified Diseases (Sec 80DDB)** form.

(OR)

The EPSF tool automatically directs the user to **Medical for Specified Diseases (Sec 80DDB)** page once the details in previous tab are saved and confirmed

Employee to fill Medical for Specified Diseases (Sec 80DDB) details in the form

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	690400	0

Ded. Under Chapter VI A

Attachments Support
0 out of 0 are uploaded. 0 are pending
Document List

Document for

Medical for Specified Diseases (Sec 80DDB)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical for Specified Diseases (Sec 80DDB) :

Save **Submit & Preview**

Note:

1. Maximum deduction eligible u/s 80DDB is Actual expenses incurred or Rs 40,000/- whichever is less.
2. Documents to be submitted are a prescription from a specialist doctor containing name and age of the patient, name of the disease/ailment along with name, address, registration number and qualification of the specialist and **employee has to submit the original medical bills / expenditure incurred during the current financial year.**
3. Deduction under this section shall be reduced by the amount received if any from the insurance company or reimbursed by employer for the above treatment.

Previous **Next**

Figure 37: Employee fills Medical for specified diseases details

1. Employee to fill the Medical for Specified Diseases (Sec 80DDB) value in the form.

2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Employee to click the **Next** button to navigate to the **Medical for Specified Diseases for Senior Citizen (Sec 80DDB)** form.

(OR)

The EPSF tool automatically directs the user to Medical for Specified Diseases for Senior Citizen (Sec 80DDB) page once the details in previous tab are saved and confirmed

Employee to fill the details of Medical for Specified Diseases for Senior Citizen (Sec 80DDB)

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	428537	0

Personal details HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD **Ded. Under Chapter VI A**

Show only declared items

Medical Insurance Premium (Sec 80D)
Medical Insurance Premium for parents (sec 80D)
Medical Insurance Premium paid for senior Citizen (Parents)
Medical for Handicapped Dependents (Sec 80DD)
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
Medical for Specified Diseases (Sec 80DDB)
Medical for Specified Diseases for Senior Citizen (Sec 80DDB)
Interest Paid on Higher Education Loan (Sec 80E)
Deduction for Permanent Disability (Sec 80U)
Interest on House Property - Additional Exemption

Quick jump [House Property Income/\(Loss\) - Let Out Property \(Sec 240\)](#)

Medical for Specified Diseases for Senior Citizen (Sec 80DDB) i

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical for Specified Diseases for Senior Citizen (Sec 80DDB) :

Save **Submit & Preview**

Note:

1. Maximum deduction eligible u/s 80DDB is actual expenses incurred or Rs 1,00,000 which ever is less
2. Documents to be submitted are a prescription from a specialist doctor containing name and age of the patient, name of the disease/ailment along with name, address, registration number and qualification of the specialist and employee has to submit the original medical bills / expenditure incurred during the current financial year.
3. Deduction under this section shall be reduced by the amount received if any from the insurance company or reimbursed by employer for the above treatment.

Attachments 8 out of 9 are uploaded, 1 are pending

Support

Document List

Document for

Pension Scheme (Sec 80CCC)

HRA (Rent paid) Documents

House Property Income/(Loss) - Let Out (Possession Certificate,Loan)

Previous **Next**

Figure 38: Employee fills Medical for specified Diseases for senior citizen details

Employee to fill Interest Paid on Higher Education Loan (Sec80E) details in form

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	690400	0

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VI A

Show only declared items

Medical Insurance Premium (Sec 80D)

Medical Insurance Premium for parents (sec 80D)

Medical Insurance Premium paid for senior Citizen (Parents)

Medical for Handicapped Dependents (Sec 80DD)

Medical for Handicapped Dependents (severe disability) (Sec 80 DD)

Medical for Specified Diseases (Sec 80DDB)

Medical for Specified Diseases for Senior Citizen (Sec 80DDB)

Interest Paid on Higher Education Loan (Sec 80E)

Declared Proof Submitted Approved Remarks

0.00 0.00 0.00

Interest Paid on Higher Education Loan (Sec 80E)

Save **Submit & Preview**

Note:
1. Full amount of Interest paid during the financial year will be eligible.
2. Photo Copy of Certificate issued by the bank or the Financial Institution mentioning the interest amount collected/ accrued for the financial year.
3. Loan can be taken for education of Self, Spouse or children.

Previous Next

Figure 39: Employee fills the Interest paid on higher education loan details

1. Employee to fill the Interest Paid on Higher Education Loan (Sec 80E) value in the form
2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
3. Employee to click the **Next** button to navigate to the Permanent Disability (Sec 80U) form.

(OR)

The EPSF tool automatically directs the user to Permanent Disability (Sec 80U) page once the details in previous tab are saved and confirmed

Employee to fill Deduction for Permanent Disability (Sec 80U) details

The screenshot shows the 'Investment Proof Submission' page. At the top, there are tabs for 'Personal details', 'Previous employment', 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', and 'Ded. Under Chapter VIA'. The 'Ded. Under Chapter VIA' tab is active. On the left, a sidebar lists various deduction items like Medical Insurance Premium (Sec 80D), Medical for Handicapped Dependents (Sec 80DD), and Deduction for Permanent Disability (Sec 80U). The main area shows a table for 'Deduction for Permanent Disability (Sec 80U)' with columns for 'Declared', 'Proof Submitted', 'Approved', and 'Remarks'. Below the table, there's a note about deducting up to Rs. 75,000/- for medical treatment. At the bottom, there are 'Save' and 'Submit & Preview' buttons, and a 'Next' button on the right.

Figure 40: Employee fills Deduction for permanent Disability details

1. Employee to fill the Deduction for Permanent Disability (Sec 80U) value in the form.

2. Employee to click the **Save** button to save the details or click **submit and preview** button to submit the details
3. Employee to click the **Next** button to navigate to the **Interest on House Property - Additional Exemption** form.

(OR)

The EPSF tool automatically directs the user to Interest on House Property - Additional Exemption page once the details in previous tab are saved and confirmed

Employee to fill Interest on House Property - Additional Exemption details in the form

Investment Proof Submission

Declared Amount	Submitted Amount	Approved Amount
0	690400	0

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD **Ded. Under Chapter VI A**

Show only declared items

Medical Insurance Premium (Sec 80D)
Medical Insurance Premium for parents (sec 80D)
Medical Insurance Premium paid for senior Citizen (Parents)
Medical for Handicapped Dependents (Sec 80DD)
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
Medical for Specified Diseases (Sec 80DBB)
Medical for Specified Diseases for Senior Citizen (Sec 80DB)
Interest Paid on Higher Education Loan (Sec 80E)
Deduction for Permanent Disability (Sec 80U)
Interest on House Property - Additional Exemption

Quick jump [House Property Income/\(Loss\) - Let Out Property \(Sec 24\(b\)\)](#)

Interest on House Property - Additional Exemption

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Interest on House Property (Sec 80EE)

1. Loan Sanctioned Date :
2. Housing Loan availed amount :
3. Value of residential house property :
4. Are you holding any other Residential property :
5. Interest on House Property :

Save **Submit & Preview**

Note:
1. First exhaust your limit under section 24 and then go on to claim the additional benefit under section 80EE. Therefore, this deduction is in addition to INR 2 lakhs limit under section 24.
2. Housing Loan availed amount should not exceed Rs. 35 lakhs.
3. Value of the Residential House property should not exceed Rs.50 lakhs.
4. Date on which the loan is sanctioned should be within the FY 01.04.2016 to 31.03.2017.
5. Employee should not be holding any other Residential property.This must be the first house that the taxpayer has purchased
6. Loan has been sanctioned by a Financial Institution or a Housing Finance Company

[Previous](#)

Figure 41: Employee fills interest on house property details

1. Employee to fill the **Interest on House Property - Additional Exemption** value in the form
2. Employee to click the **submit and preview** button to submit the details successfully in the application.

Employee views the Investment Proof Submission page

Investment Proof Submission

GENERAL GUIDELINES

1. Update your Tax Savings Details with the details of your actual supporting you have for the Financial Year 2018 - 2019.
2. Enter the data accurately and also re-check before final submission.
3. Please keep all your investment proofs and supporting documents (soft copy) readily available. These details have to be uploaded under "Attachments".
4. There are two columns with the heading Declared and Submitted. While the Declared column shows the details of your previous declaration provided for tax processing, you will have to enter the details of your actual tax submissions in Submitted section only.
5. Certain Submission sections have Annexures where data has to be filled in the Annexure only. Hence click on "Click here to update" tab field to enter the details for those sections. Sections like House Property, Children Education, Life Insurance Premium, Sukanya Samridhi Scheme, Mutual Funds have annexures.
6. Please use the Rent declaration format for Jan 2019 / Feb 2019 / Mar 2019 which is available under Downloads Menu for future rent payable. Rent Receipt format is also available under "Download" section.
7. The Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than INR 8, 333 per month/INR 100, 000 per annum. In the absence of the above, we are afraid to inform you that HRA exemption may not be extended.
8. Before finalSubmission, print of Form 12BB is to be taken (which is generated through ascent portal) and is to be signed and uploaded again, post which Final Submission is to be done.
9. As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / consider that the construction of the property is completed and people are residing in that property.
10. House Property Exemption limited to 2.0 Lakhs for the FY 2018-19 including Self occupied & Let out property.
11. Income tax will be calculated based on approved value of investment proofs submitted & all your declaration will be nullified after the cutoff date. Failure to submit the Investment Proofs against declaration will result in higher income tax deduction.
12. Please be sure about the accuracy of your submissions before clicking the Final submission ("I Agree and Submit") button as the tool will not allow to make any modifications OR additions in EPSF (Investment Proofs) submission tool.
13. For help at section please move the cursor to 'i' icon for reference.
14. Before proceeding to the next section, please click on save button as and when you update & upload the details at each page.

Proof submission status

Proof Submission Upload form 12BB Validation Approval

1 2 3 4

Pending for FORM12BB upload and Final Submission

Approval status

Category	Value
Submitted	135825
Approved	0
Variance	-135825

Declaration Vs proof submission

My investments

Figure 42: Employee views the Investment Proof Submission page

1. Once employee submits all the forms, he/she can view the **Modify** and **preview** buttons in the Investment Proof Submission page.
2. Employee can click the **Modify** button to do necessary changes if needed.
3. Employee clicks **Preview** button to re-generate Form 12BB

If employee clicks Submit and Preview button

Once employee clicks "Submit and preview" button, below dialog box appears.

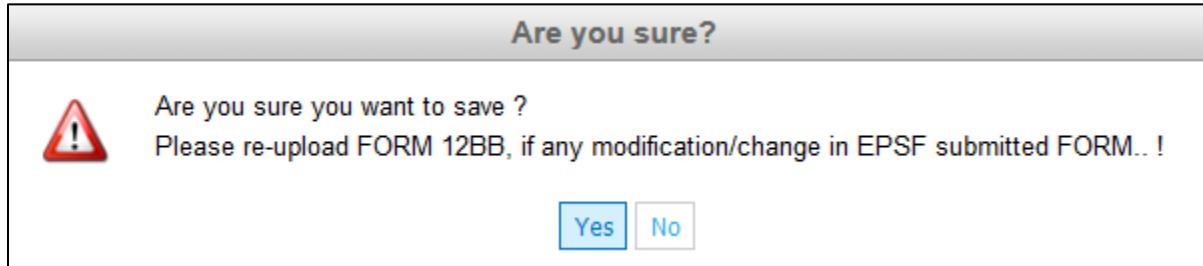


Figure 43: Employee clicks Yes button

Employee clicks "Yes" button to submit the details and will be navigated to Generate Form 12BB.

Investment Proof Submission
[Back](#)

Component	Submitted	Approved
Income from the previous employer during the current year		
Income received from previous employer or salary	500.00	0
Professional Tax recovered by previous employer	400.00	0
Pension Fund contributed with Previous employer	300.00	0
Tax paid outside salary / Tax recovered by previous employer	250.00	0
Information for HRA Exemption		
Rent Paid Apr-18	100000.00	0
Rent Paid May-18	0.00	0
Rent Paid June-18	0.00	0
Rent Paid July-18	0.00	0
Rent Paid Aug-18	0.00	0
Rent Paid Sep-18	0.00	0
Rent Paid Oct-18	0.00	0
Rent Paid Nov-18	0.00	0
Rent Paid Dec-18	0.00	0
Rent Paid Jan-19	0.00	0
Rent Paid Feb-19	0.00	0
Rent Paid Mar-19	0.00	0
Income other than Income from Salary		
House Property Income(Gross) - Let Out Property (Sec 24(3))	0.00	0
Interest on Housing Loan-Self Occupied Property (Sec 24(3))	0.00	0
Other Income (HSC Interest, etc.)	0.00	0
Total Investments U/s HSC & BSCC limited up to Rs 1.5 Lakh + Rs 30000 for additional HPS + Rs 25000 for BSCC		
Employee Provident Fund	0.00	0
Voluntary Provident Fund	0.00	0
Deduction under Life Insurance-Pension Scheme (Sec 80CCC)	563.00	0
Public Provident Fund	5262.00	0
Children Education Expenses	0.00	0
National Savings Certificate (HSC)	0.00	0
Insurance Premium	0.00	0
Housing Loan Principal Repayment	0.00	0
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years	0.00	0
Sukanya Samriddhi Scheme	0.00	0
Accrued HSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Employee contribution towards HPS	0.00	0
Other Permitted Deductions		
Medical Insurance Premium (Sec 80D)	0.00	0
Medical Insurance Premium for parents (sec 80D)	0.00	0
Medical Insurance Premium paid for senior Citizen (Parents)	0.00	0
Medical for Handicapped Dependents (Sec 80D)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DDE)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DDE)	0.00	0
Interest Paid on Higher Education Loan (Sec 80E)	0.00	0
Deduction for Permanent Disability (Sec 80L)	0.00	0
Interest on House Property - Additional Exemption	0.00	0
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Upload Form 12BB <input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Browse"/> or <input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Select file..."/></p> <p><input checked="" type="checkbox"/> I declare the information given above is true & correct. I undertake to inform immediately of any change in the above facts. Any income tax liability arising out of wrong declaration will be my responsibility.</p> <p>To submit the previous page, Please download the Form 12BB and attach the same in attachment tab with your signature.</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Please Note:</p> <ol style="list-style-type: none"> 1. No alteration or modification allowed in EPSF (Investment Proof) once you submit the " Submit tax proof " button. 2. Please re-upload Form 12BB, if any modification/change in EPSF submitted FORM </div>		

Figure 44: Employee clicks Generate Form 12BB

Ecode : TESTEMP027

FORM NO.12BB (See rule 26C)				
Statement showing particulars of claims by an employee for deduction of tax under section 192				
Sl. No.		Nature of claim	Amount (Rs.)	Evidence / particulars
(1)	(2)	(3)	(4)	
1	House Rent Allowance:			
	(i) Rent paid to the landlord	130000.00	Rent receipts / Rental Agreement / Bank statement	
	(ii) Name of the landlord			
	1. test			
	(iii) Address of the landlord			
	1. 100ft Road bangalore			
	(iv) Permanent Account Number of the landlord			
	1. GXCPNR4594P			
	Note: Permanent Account Number shall be furnished if the aggregate rent paid during the previous year exceeds one lakh rupees.			
2	Leave travel concessions or assistance	0.00		
3	Deduction of interest on borrowing (Income from house property) :			
	(i) Interest payable/paid to the lender			
	1. Interest on Let-out property (Including Pre-EMI Interest)	0.00		
	2. Interest on Self Occupied (Including Pre-EMI Interest)	0.00		
	Deduction under Chapter VI-A			
	(A) Section 80C, 80CCC and 80CCD			
	(i) Section 80C			
	Public Provident Fund	5262.00	Photo Copy of passbook	
	(ii) Life Insurance Pension Scheme (Section 80CCC)	563.00	Photo Copy of premium receipt	
	(iii) Employee's contribution towards NPS (Section 80CCD)	0.00		
	(B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.			
VERIFICATION				
I TESTEMP 027 son/daughter of _____ do hereby certify that the information given above is complete and correct				
Place :				
Date :	(Signature of the employee)			
Designation : DEPUTY MANAGER	Full Name: TESTEMP 027			

Figure 45: Employee adds the signature in the form

- Employee clicks Generate Form 12BB and above form will generate as shown in Figure 20
- Employee adds the signature in the form and clicks **Browse** button to upload the signed form as shown in Figure 19 : Employee clicks Generate Form 12BB.
- Employee clicks Upload button

Investment Proof Submission
[Back](#)

Component	Submitted	Approved
Income from the previous employer during the current year		
Income received from previous employer or salary	500.00	0
Professional Tax recovered by previous employer	400.00	0
Pension Fund contributed with Previous employer	300.00	0
Tax paid outside salary / Tax recovered by previous employer	250.00	0
Information for HRA Exemption		
Rent Paid Apr-18	130000.00	0
Rent Paid May-18	0.00	0
Rent Paid Jun-18	0.00	0
Rent Paid Jul-18	0.00	0
Rent Paid Aug-18	0.00	0
Rent Paid Sep-18	0.00	0
Rent Paid Oct-18	0.00	0
Rent Paid Nov-18	0.00	0
Rent Paid Dec-18	0.00	0
Rent Paid Jan-19	0.00	0
Rent Paid Feb-19	0.00	0
Rent Paid Mar-19	0.00	0
Income other than Income from Salary		
House Property Income(Loss) - Let Out Property (Sec 24(3))	0.00	0
Interest on Housing Loan-Self Occupied Property (Sec 24(3))	0.00	0
Other Income (NSC Interest, etc.)	0.00	0
Total Investments to Rs 50K & 80CCC limited up to Rs 5.5 Lakhs + Rs 50000 for additional NPS + Rs 25000 for 80CCG		
Employee Provident Fund	0.00	0
Voluntary Provident Fund	0.00	0
Deduction under Life Insurance Pension Scheme (Sec 80CCG)	963.00	0
Public Provident Fund	5262.00	0
Children Education Expenses	0.00	0
National Savings Certificate (NSC)	0.00	0
Insurance Premium	0.00	0
Housing Loan Principal Repayment	0.00	0
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years	0.00	0
Suganya & Samridhi Scheme	0.00	0
Advised NSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Employee contribution towards NPS	0.00	0
Other Permitted Deductions		
Medical Insurance Premium (Sec 80D)	0.00	0
Medical Insurance Premium for parents (sec 80D)	0.00	0
Medical Insurance Premium paid for senior Citizen (Parent)	0.00	0
Medical for Handicapped Dependents (Sec 80DD)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DDE)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DDVR)	0.00	0
Interest Paid on Higher Education Loan (Sec 80H)	0.00	0
Deduction for Permanent Disability (Sec 80L)	0.00	0
Interest on House Property - Additional tax exemption	0.00	0

8 out of 4 are uploaded, 4 are pending

Document List

Document for

- Previous Employment Income : Form 16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory
- HRA (Rent paid) Documents
- Pension Scheme (Sec 800CC)
- Public Provident Fund

Figure 46: Employee clicks Upload button

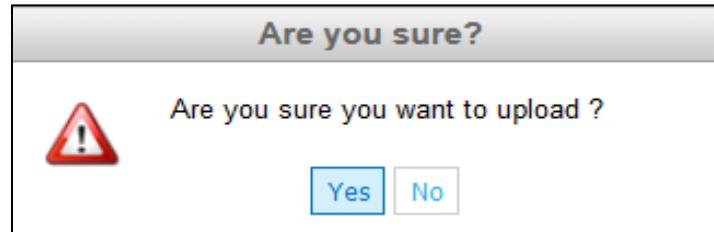


Figure 47: Confirmation dialog box appears

- Employee click "Yes" button to upload the file.

Investment Proof Submission
[Back](#)

Component	Submitted	Approved
Income from the previous employer during the current year		
Income received from previous employer during	500.00	0
Professional Tax recovered by previous employer	400.00	0
Prudent Fund contributed with Previous employer	300.00	0
Tax paid outside salary / Tax recovered by previous employer	250.00	0
Information for HRA Exemption		
Went Paid Apr-10	100000.00	0
Went Paid May-10	0.00	0
Went Paid Jun-10	0.00	0
Went Paid Jul-10	0.00	0
Went Paid Aug-10	0.00	0
Went Paid Sep-10	0.00	0
Went Paid Oct-10	0.00	0
Went Paid Nov-10	0.00	0
Went Paid Dec-10	0.00	0
Went Paid Jan-10	0.00	0
Went Paid Feb-10	0.00	0
Went Paid Mar-10	0.00	0
Income other than Income from Salary		
House Property Income(Loss) - Let Out Property (Sec 24(1))	0.00	0
Interest on Housing Loan(Self Occupied Property (Sec 24(2)))	0.00	0
Other Income (HSC Interest, etc.)	0.00	0
Total Investments (Rs 1000 & 80CCC Limited up to Rs 1.5 Lakh + Rs 50000 for additional NPS + Rs 25000 for 80CCG)		
Employees Prudent Fund	0.00	0
Voluntary Prudent Fund	0.00	0
Deduction under Life Insurance Pension Scheme (Sec 80CCC)	503.00	0
Public Prudent Fund	5262.00	0
Children Education Expenses	0.00	0
National Savings Certificate (NSC)	0.00	0
Insurance Premium	0.00	0
Housing Loan Principal Repayment	0.00	0
Others - Post Office Savings Schemes - Tax Saver Term Deposit - 5 years	0.00	0
Sukanya Samriddhi Scheme	0.00	0
Accrued NSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Employee contribution towards NPS	0.00	0
Other Permitted Deductions		
Medical Insurance Premium (Sec 80D)	0.00	0
Medical Insurance Premium for parents (Sec 80D)	0.00	0
Medical Insurance Premium paid for senior Citizen (Parent)	0.00	0
Medical for Handicapped Dependents (Sec 80DD)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DDE)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DDE)	0.00	0
Interest Paid on Higher Education Loan (Sec 80E)	0.00	0
Deduction for Permanent Disability (Sec 80L)	0.00	0
Interest on House Property - Additional Exemption	0.00	0

0 out of 4 are uploaded. 4 are pending.

Document List

Previous Employment Income Form 16 / Tax computation sheet of current financial year - duly signed by the respective authorized signature	
HRA (Went paid) Documents	
Pension Scheme (Sec 80CCC)	
Public Prudent Fund	

[Upload Form 12BB](#)
[Browse](#)
 No file selected.

[Upoad](#)
[Or File Choose F 12BB](#)

Download last updated Form 12BB - ADDownload Last updated on - 19/10/2018 10:15:18

Declaration:

I declare the information given above is true & correct. I undertake to inform immediately of any change in the above facts. Any income tax liability arising out of wrong declaration will be my responsibility.

[Submit Tax Proof](#)

Please Note:

1. No alteration or modification allowed in EPSF Investment Proof until once you submit the " Submit Tax Proof " button.

2. Please re-upload F 12BB, if any modifications/changes in EPSF submitted F 12BB.

Figure 48: Employee clicks Submit Tax Proof button

Once employee uploads the file, employee need to tick the declaration present and proceed with the final submission by clicking on “Submit tax Proof”

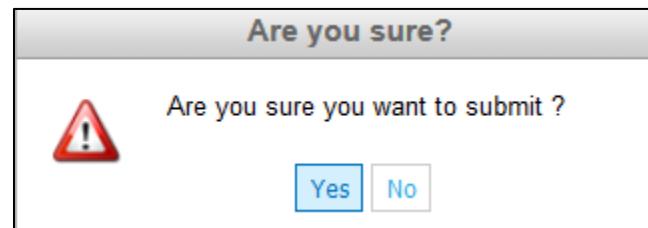


Figure 49: Confirmation dialog box appears

- Employee to click “Yes” button to submit the details successfully.

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