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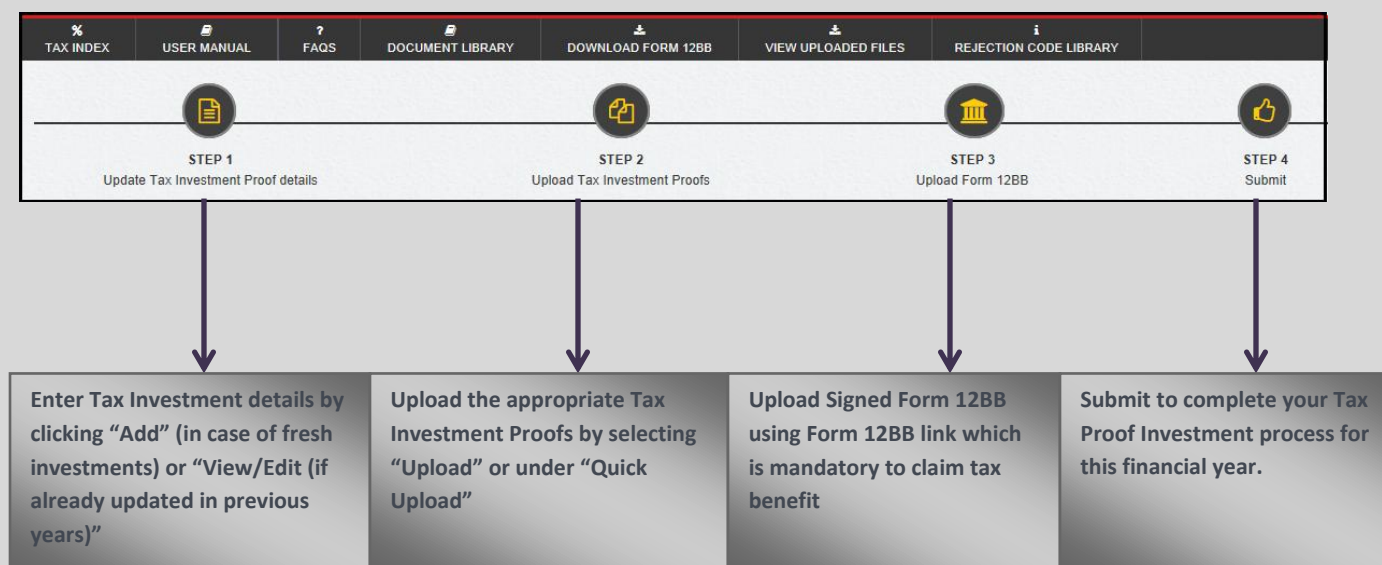
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Tax Proof Submission Manual

Allsec Online Tax Proof Submission

- Allsec introduces submission of investment proofs as soft copy through Employee Self Service (ESS) portal.
- Easy and hassle free way to submit the investment proof by employees.
- Soft copy investment proofs will be processed by Allsec.

Follow the simple steps mentioned below and upload soft copies of your investment proofs in the Allsec ESS web portal.



Important Note:

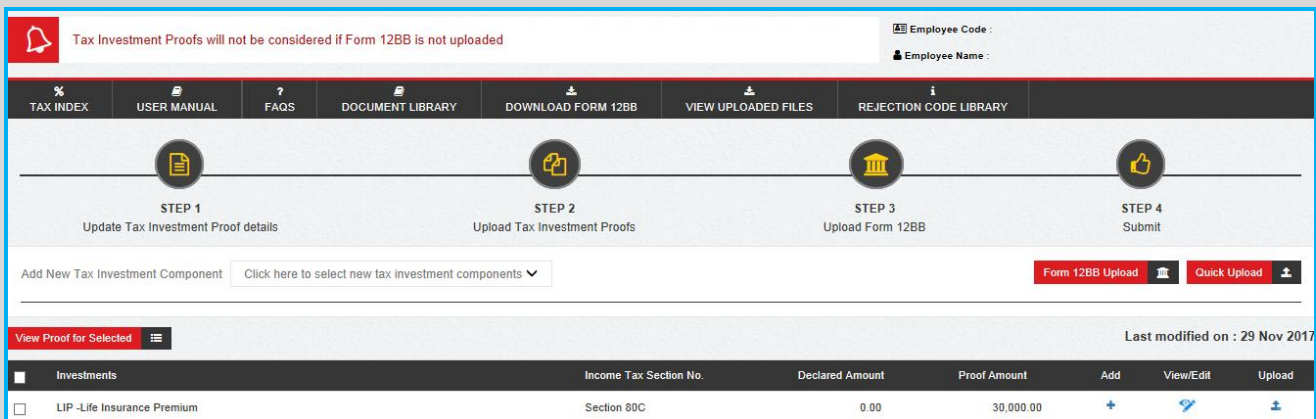
NO PROOF will be considered without uploading duly signed and scanned Form 12BB in Allsec ESS Portal.

Any Modification/Upload/Delete will not be permitted once Submit button is clicked.

Tax Proof Submission Manual

Accessing the Tax Proof Submission - Navigation

1. Logon to Allsec ESS portal
2. Select “Tax” menu
3. Under Tax drop-down select and click on “Tax Proof Submission”
4. Click on “Tax Proof Submission” to reach Tax Index page



The screenshot shows the 'Tax Index' page of the Allsec ESS portal. At the top, there is a notification bar with a bell icon and the text: 'Tax Investment Proofs will not be considered if Form 12BB is not uploaded'. To the right of this bar are input fields for 'Employee Code' and 'Employee Name'. Below the notification bar is a navigation menu with the following items: TAX INDEX (selected), USER MANUAL, FAQs, DOCUMENT LIBRARY, DOWNLOAD FORM 12BB, VIEW UPLOADED FILES, and REJECTION CODE LIBRARY. The main content area features a four-step process flow: STEP 1: Update Tax Investment Proof details (document icon), STEP 2: Upload Tax Investment Proofs (upload icon), STEP 3: Upload Form 12BB (bank icon), and STEP 4: Submit (thumbs up icon). Below the flow, there is a section for 'Add New Tax Investment Component' with a dropdown menu and a 'Click here to select new tax investment components' link. To the right of this section are two buttons: 'Form 12BB Upload' and 'Quick Upload'. At the bottom, there is a table titled 'View Proof for Selected' with a 'Last modified on : 29 Nov 2017' timestamp. The table has columns for 'Investments', 'Income Tax Section No.', 'Declared Amount', 'Proof Amount', 'Add', 'View/Edit', and 'Upload'. The first row shows 'LIP -Life Insurance Premium' under 'Investments', 'Section 80C' under 'Income Tax Section No.', '0.00' under 'Declared Amount', and '30,000.00' under 'Proof Amount'. The 'Add', 'View/Edit', and 'Upload' columns for this row contain icons for adding, viewing/editing, and uploading respectively.

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> LIP -Life Insurance Premium	Section 80C	0.00	30,000.00	+		

Tax Proof Submission Manual

Tax Index Page

Tax Index displays current year declarations and available investments

User Manual to guide on usage of Tax Proof Module

FAQs tab contains FAQs related to Tax Proofs submission

Document Library contains all relevant documents and forms

Download Form 12BB to Generate Form 12BB

View Uploaded Files to view tax proof files uploaded

Rejection code library contains list of rejection codes with detailed description

TAX INDEX

USER MANUAL

FAQS

DOCUMENT LIBRARY

DOWNLOAD FORM 12BB

VIEW UPLOADED FILES

REJECTION CODE LIBRARY

STEP 1

Update Tax Investment Proof details

STEP 2

Upload Tax Investment Proofs

STEP 3

Upload Form 12BB

STEP 4

Submit

Add New Tax Investment Component

Click here to select new tax investment components

Form 12BB Upload

Quick Upload

View Proof for Selected

Investments

	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00	+		
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Fixed Deposit	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Tuition Fee	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Unit Linked Insurance Plan	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Sukanya Samiridhi Account Scheme	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Medical insurance premium paid for Parent	Section 80D	0.00	0.00	+		
<input type="checkbox"/> 80DD - Disabled Dependant	Section 80DD	0.00	75,000.00			
<input type="checkbox"/> Loss from Letout Property	Section 24	0.00	0.00	+		
<input type="checkbox"/> 80EE - Additional Deduction on Home Loan Interest	Section 80EE	0.00	50,000.00			
<input type="checkbox"/> National Pension Scheme	Section 80CCD	0.00	15,015,852.00	+		

Submit

Any activity will not be permitted after submission







Updated proof can be viewed by using this option for the selected investments


After uploading the Tax Investment Proofs and signed Form 12BB, Click **Submit** to complete the process

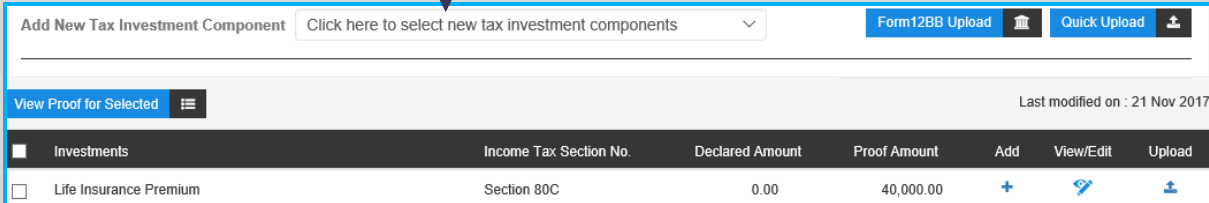
Any Modification/Upload/Delete will not be permitted once Submit button is clicked.



Step 1: Update Tax Investments Proof Details

A) To Add Fresh Investments:

- To add new Investments, select the investment type from drop down list “Add New Tax Investment Component”. Refer in below picture A 
- Page will be redirected to new window, to enter details for the selected investment. Refer in below picture A 
- After entering the required details for the selected investment, employee needs to click the “Save” button, then click “Ok”. Two “Save” buttons are available both in top and bottom of the window. Any of these “Save” button can be used. Refer in below picture A  & 
- To add another record for the selected Investment Type, click “Add Additional Line Item”. Refer in below picture A 
- To go back to Tax Index Page, Click “Back” button. Refer in below picture A 

 **Picture A**



Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		

Tax Proof Submission Manual

The screenshot shows the 'Life Insurance Premium' form. Callout 2 points to the 'Name of the Insurance Company' field. Callout 3 points to the 'Save' button at the bottom left. Callout 4 points to the 'Save' button at the top right. Callout 5 points to the 'Add Additional Line Item' button at the top left. Callout 6 points to the 'Back' button at the top right. An 'ALERT' box in the center states 'Save was successful' with an 'Ok' button.

B) To Edit Investments details updated in Previous Years:

- Click "Edit" icon available under "View/Edit" Column against respective Tax Investment type in Tax Index Page. Refer in below picture B **1**
- Page will be redirected to new window, to update previous year details for selected Investment Type. To edit Investment details updated during previous year, employee can click drop down and select Previous Financial Year which will display records updated during previous FY. Refer in below picture B **2**
- To modify any previous year records displayed, select respective record and click "Edit" Option. Refer in below picture B **3**
- Page will be redirected to new window to update the investment details for the selected record. Click "Save" and click "Ok". Refer in below picture B **4** & **5**

Picture B

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Unload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		⬇
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00			
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00			

Click here to update your proof details against your declaration

Tax Proof Submission Manual

Life Insurance Premium

Select Tax Investment Component
Life Insurance Premium

[Add Additional Line Item](#) + [Back](#) <

[View Proof for Selected](#) [Edit Selected](#) [Delete Selected](#) All

<input type="checkbox"/>	Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 17-18 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/>	LIC	8651963	07/07/2010	200000	10000	40000	

[Click here to update your proof details against your declaration](#)

Life Insurance Premium

[Add Additional Line Item](#) + [Save](#) [Back](#) <

LIC - Policy No. : 8651963

ALERT
Save was successful
[Ok](#)

Name of the Insurance Company: LIC
Policy No.: 8651963
Date of Commencement (dd/mm/yyyy): 07/07/2010
Sum Assured: 200000

Quarterly
Number of Installment Paid on or after 1st Apr 17 (Count): 3
Number of Installment Payable on or before 31st Mar 18 (Count): 1

Amount paid on or after 1st Apr 17 (Amt):
Amount payable on or before 31st Mar 18 (Amt):
Total amount FY 17-18 (Paid Amt+Payable Amt): 40000
Relationship: Spouse

[Save](#) [Back](#) <

C) Add new Investments against Investment Type:

- Click "Add" icon available under "Add" column in Tax Index Page against respective Investment Type to create new record. Refer in below Picture C **1**

Picture C

<input type="checkbox"/>	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Life Insurance Premium	Section 80C	0.00	40,000.00	+	Click here to add Proof details	Upload
<input type="checkbox"/>	Public Provident Fund	Section 80C	0.00	10,000.00	+		Upload
<input type="checkbox"/>	Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	10,000.00	+		Upload

D) View/Edit/Delete Investments

- Click "Edit" icon available under "View/Edit" Column against respective Tax Investment type in Tax Index Page. Refer in below picture D **1**
- Page will be redirected to new window which will display list of existing proof details for selected Investment Type. To edit details, employee can either select "Edit" option available in that selected record. Refer in below picture D **2**
- To edit multiple records, select respective records and click "Edit Selected" link. Refer in below picture D **3**

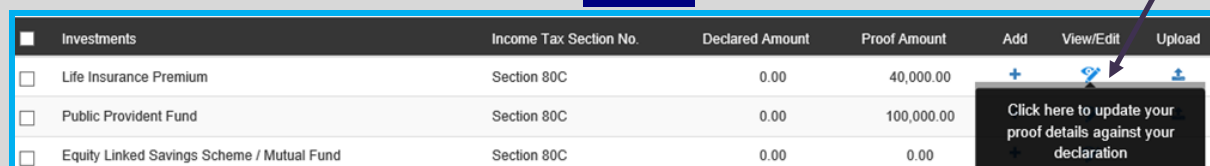
Tax Proof Submission Manual

- To Delete Investment, select the respective record and click “Delete Selected” Option.

Refer in below picture D 4

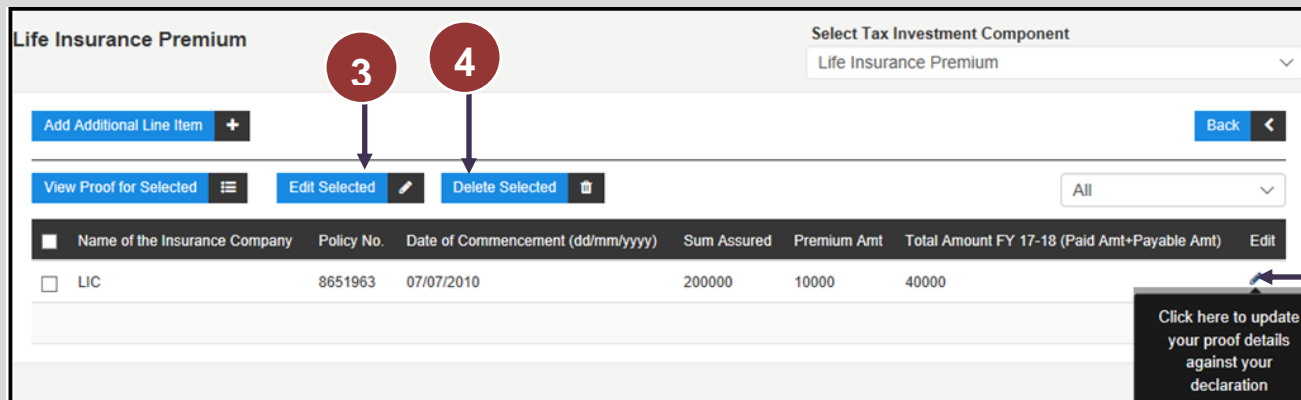
IMPORTANT NOTE: Any Investment details deleted cannot be ROLLED back.

Picture D



<input type="checkbox"/>	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/>	Public Provident Fund	Section 80C	0.00	100,000.00			
<input type="checkbox"/>	Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00			

Click here to update your proof details against your declaration



Life Insurance Premium

Select Tax Investment Component
Life Insurance Premium

Add Additional Line Item + Back <


View Proof for Selected Edit Selected Delete Selected All

<input type="checkbox"/>	Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 17-18 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/>	LIC	8651963	07/07/2010	200000	10000	40000	

Click here to update your proof details against your declaration

Step 2: To Upload Tax Investment Files

A) Normal Upload

- Once Investment details are updated for current year, then files can be uploaded.
- Click upload icon  to upload the file against respective investment type. Refer in below picture E 1
- Click “Browse” to select the file from respective path and click “Upload” to upload the file.
Refer in below picture E 2
- “File Uploaded Successfully” message will be displayed. Click “Ok” to proceed.
- Maximum File size that can be allowed is 10 MB and the file types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps

Tax Proof Submission Manual

Picture E

<input type="checkbox"/>	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/>	Public Provident Fund	Section 80C	0.00	100,000.00	+		
<input type="checkbox"/>	Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00	+		

Click here to upload your tax investment proofs

Normal Upload

Kindly do not upload password protected file. Password protected file will not be considered

2

1. Maximum/Overall File size allowed for upload is 10 MB.

2. File types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps..

3. Form 12BB should not be uploaded here. It should be uploaded under "Form 12BB upload".

B) Quick Upload

- Quick Upload is a special feature available in Tax Index page to upload files quickly when all Investment Proof details are updated for current year. Refer in below picture F 1
- Uploaded Files can be viewed under the link "View Uploaded Files" in Tax Index Page. Refer below picture F 2

Picture F

TAX INDEX
DOCUMENT LIBRARY
REJECTION CODE LIBRARY
FAQ'S
DOWNLOAD FORM 12 BB
VIEW UPLOADED FILES

STEP 1
Update Tax investment proof details

STEP 2
Upload the tax investment supporting

STEP 3
Upload Form 12 BB

STEP 4
Submit

Add New Tax Investment Component

Click here to select new tax investment components

Click here to upload the soft copies of 'all' proof documents

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Tax Proof Submission Manual

Quick Upload Screen will display only list of Investment components for which Investment Proof details are updated. Select Investment Type for which files are available.

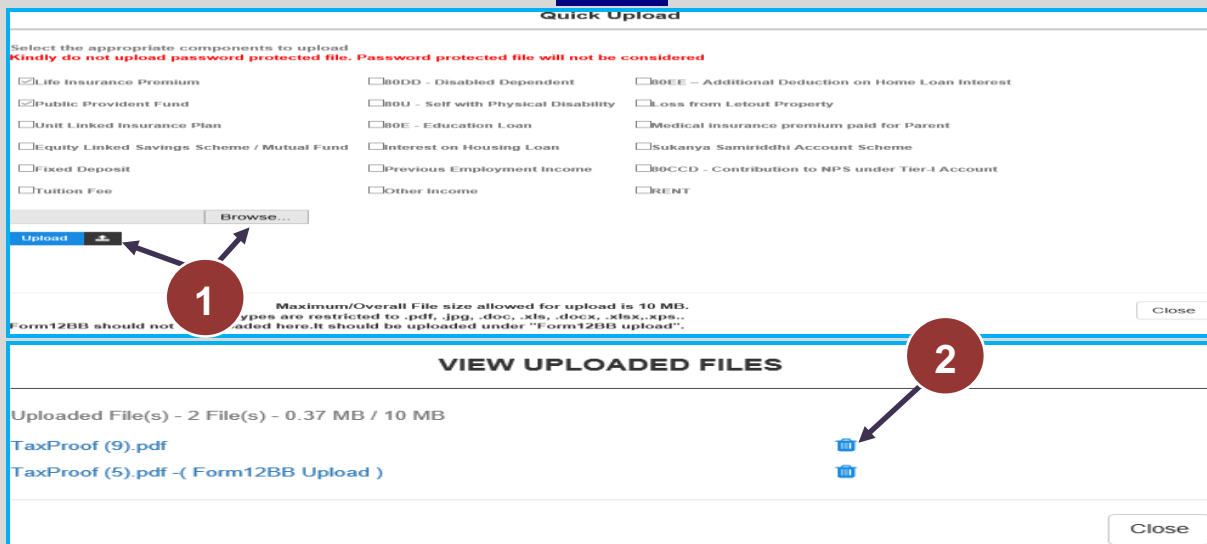
- Click “Browse” to select the file from respective path and click “Upload” to upload the selected files.

Refer below picture G. **1**

- Uploaded Files can be deleted/removed using “Delete” option available under “View Uploaded Files” link.

Refer below picture G. **2**

Picture G



Quick Upload

Select the appropriate components to upload
Kindly do not upload password protected file. Password protected file will not be considered



<input checked="" type="checkbox"/> Life Insurance Premium	<input type="checkbox"/> 80DD - Disabled Dependent	<input type="checkbox"/> 80EE - Additional Deduction on Home Loan Interest
<input checked="" type="checkbox"/> Public Provident Fund	<input type="checkbox"/> 80U - Self with Physical Disability	<input type="checkbox"/> Loss from Letout Property
<input type="checkbox"/> Unit Linked Insurance Plan	<input type="checkbox"/> 80E - Education Loan	<input type="checkbox"/> Medical insurance premium paid for Parent
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	<input type="checkbox"/> Interest on Housing Loan	<input type="checkbox"/> Sukanya Samrididhi Account Scheme
<input type="checkbox"/> Fixed Deposit	<input type="checkbox"/> Previous Employment Income	<input type="checkbox"/> 80CCD - Contribution to NPS under Tier-I Account
<input type="checkbox"/> Tuition Fee	<input type="checkbox"/> Other Income	<input type="checkbox"/> RENT

Upload **1** Browse...

Maximum/Overall File size allowed for upload is 10 MB.
Types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps.
Form12BB should not be uploaded here. It should be uploaded under "Form12BB upload".

VIEW UPLOADED FILES

Uploaded File(s) - 2 File(s) - 0.37 MB / 10 MB

TaxProof (9).pdf	
TaxProof (5).pdf - (Form12BB Upload)	

2

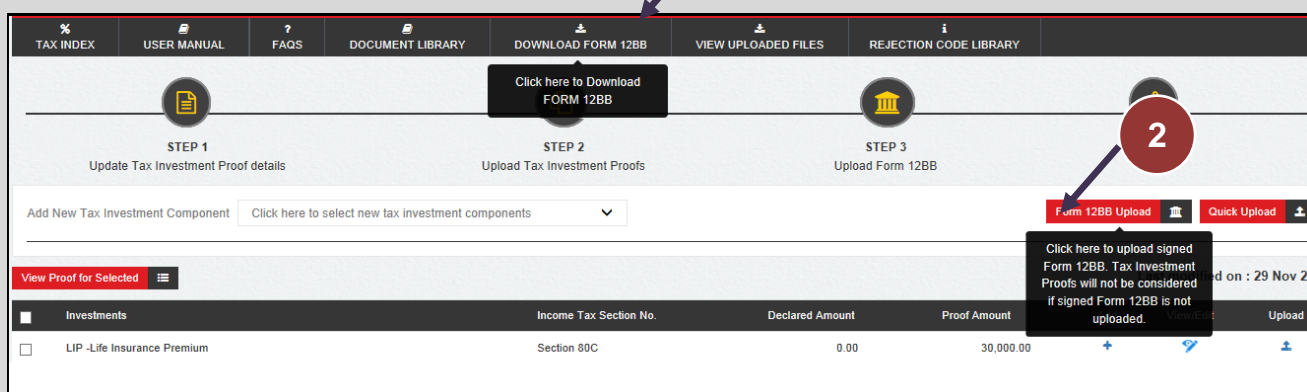
Close

Tax Proof Submission Manual

👉 Step 3: Upload Form 12BB

- Click “Download Form 12BB” link in Tax Index Page to download Form 12BB PDF file.
Take Print, Sign & Scan and upload duly signed Form 12BB using “Form 12BB Upload” link.
Refer below picture H 1 & 2
- Click “Browse” to select duly signed Form 12BB PDF file from respective path and click “Upload” to upload the file. **Refer in below picture H 3**

Picture H



Form 12BB Upload

Kindly do not upload password protected file. Password protected file will not be considered

Browse...

Upload

3

1. Maximum/Overall File size allowed for upload is 10 MB.
2. File types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps..
3. Only Form 12BB should be uploaded here.


Close

Important Note:

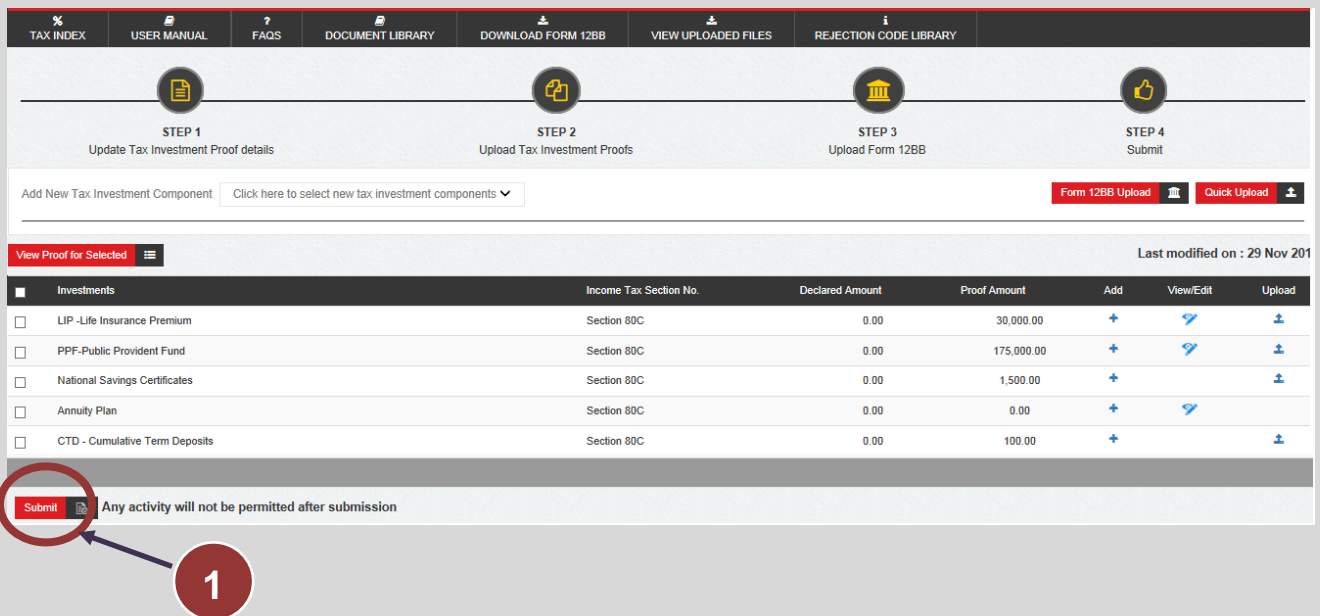
NO PROOF will be considered without duly signed and scanned Form 12BB is uploaded in Allsec ESS Portal.

Tax Proof Submission Manual











Step 4: SUBMIT

- Click “Submit” button to complete your Tax proof Investment process for the financial year.
- Tax proof page will not be editable if final “Submit” is done. Refer in below picture I 

Picture I



The screenshot displays the 'Tax Proof Submission' interface. At the top, there is a navigation bar with links: TAX INDEX, USER MANUAL, FAQs, DOCUMENT LIBRARY, DOWNLOAD FORM 12BB, VIEW UPLOADED FILES, and REJECTION CODE LIBRARY. Below this is a progress bar with four steps: STEP 1 (Update Tax Investment Proof details), STEP 2 (Upload Tax Investment Proofs), STEP 3 (Upload Form 12BB), and STEP 4 (Submit). The 'Submit' step is currently active. Below the progress bar, there is a section for 'Add New Tax Investment Component' with a dropdown menu. To the right, there are buttons for 'Form 12BB Upload' and 'Quick Upload'. Below this is a table titled 'View Proof for Selected' with columns: Investments, Income Tax Section No., Declared Amount, Proof Amount, Add, View/Edit, and Upload. The table lists five investment types: LIP -Life Insurance Premium, PPF-Public Provident Fund, National Savings Certificates, Annuity Plan, and CTD - Cumulative Term Deposits. At the bottom left, the 'Submit' button is circled in red, and a red circle with the number 1 points to it. A warning message states: 'Any activity will not be permitted after submission'.

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> LIP -Life Insurance Premium	Section 80C	0.00	30,000.00	+		
<input type="checkbox"/> PPF-Public Provident Fund	Section 80C	0.00	175,000.00	+		
<input type="checkbox"/> National Savings Certificates	Section 80C	0.00	1,500.00	+		
<input type="checkbox"/> Annuity Plan	Section 80C	0.00	0.00	+		
<input type="checkbox"/> CTD - Cumulative Term Deposits	Section 80C	0.00	100.00	+		

Clearance Status Display

Clearance status will be displayed as per the timelines circulated to you and you can check for your Tax proof clearance against each Investment type.