



Ascent Consulting Services Pvt. Ltd.

User Guide for Employee Proof Submission

Standard Document

(Employee Perspective)



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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 details like personal details, Previous employment, House Rent Receipt Submission (HRA), Housing loan/House Property Income or Loss, Other income (Bank interest, etc.), Tax saving Investments Under Section 80C, Other Permitted Exemptions successfully in 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
	Tip



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Getting Started

Login to the application

To login to an application, follow the below instructions:

- ❖ Open web browser.
- ❖ Type address in the **Address** bar and press the **Enter** button to navigate to below screen.

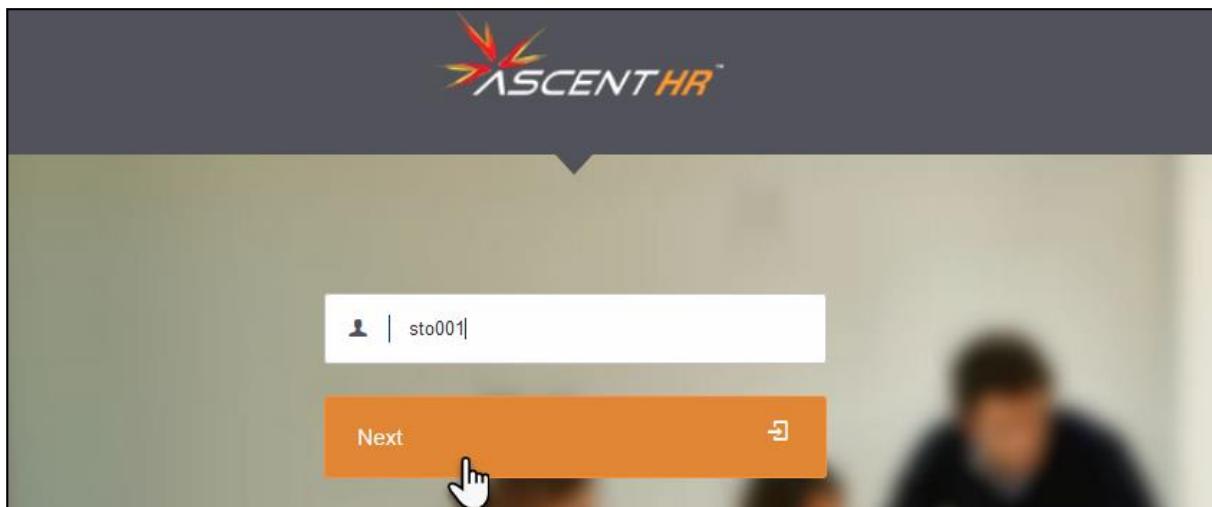


Figure 1: Login Page

- ❖ Type **Username** in textbox and click the **Next** button. This will prompt to enter password.

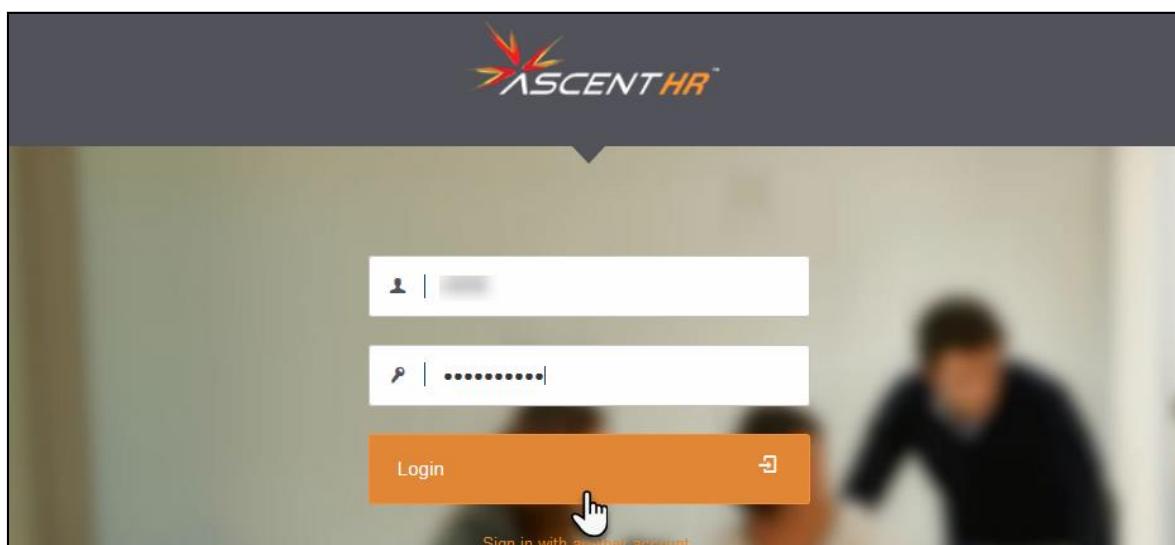


Figure 2: Login (password page)

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

Employee submits EPSF details in the application

After login to the portal, employee views Welcome page

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

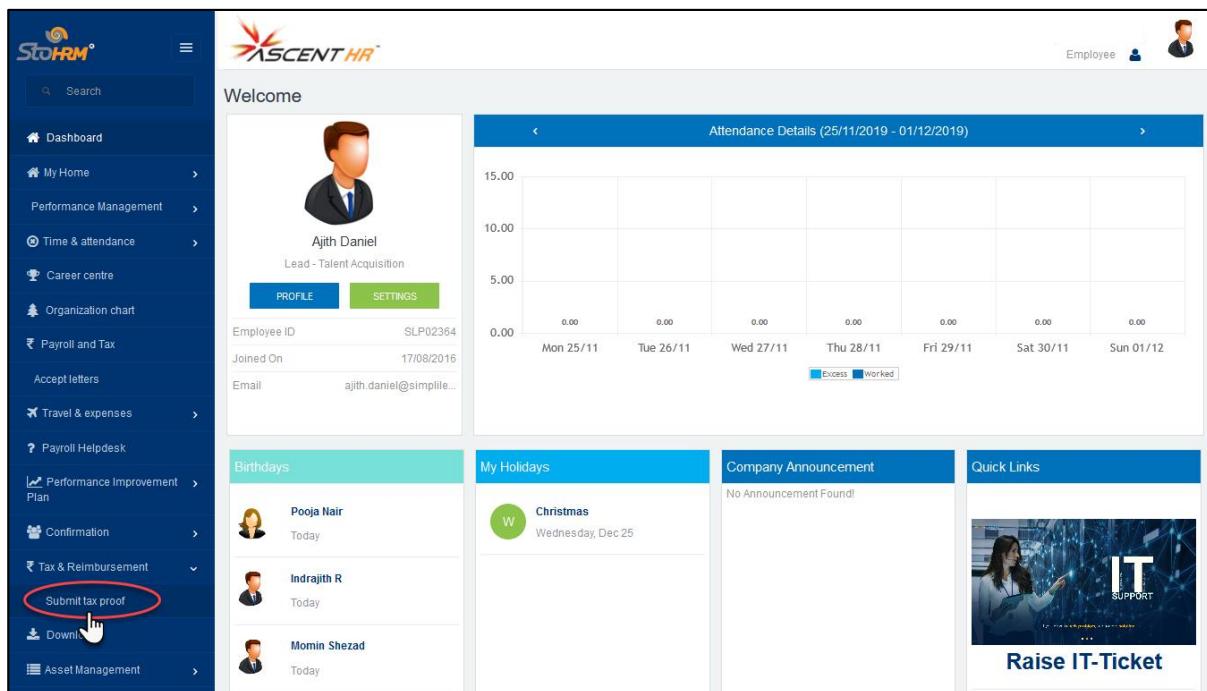


Figure 3: Employee clicks the Submit tax proof submenu

- Expand **Tax & Reimbursement** menu and click **Submit tax proof** submenu, this will be navigated to the Investment Proof Submission page as shown in the below screenshot.



Employee selects Tax regime before filling the EPSF Details

Screen will prompt you to choose the tax regime once again. Irrespective of which Tax Regime you opted earlier, you will have option to change it now. Hence, use the **Dynamic Calculator and decide on which Tax Regime suits you**. Once you chose the Tax Regime, update your investment then you **cannot change your Tax Regime**

Employee Details			
Employee Code	epsf0007	Employee Name	epsf0007 0007
Date of Birth	19/05/1991	Date of Joining	01/05/2019
Designation	HR EXECUTIVE		

General Guidelines						
In the Budget 2020, the Government of India has proposed a personal income tax regime. This is optional and you can choose to follow either the existing income tax regime or the new one.						
To help you make the right choice,						
1. The following table show the tax rates as mentioned in the point. Please study the information carefully and choose the right tax regime for you. 2. Use the Dynamic Tax Calculator in the ESS portal to calculate the tax liability of the two regimes. 3. Refer the videos and read the FAQ's on the new budget in the Downloads section of the ESS site. 4. After you decide on a tax regime to follow, submit the declaration of your choice on the right side of this page. 5. Once the option is updated, you can proceed further to submit your tax declarations applicable basis your Tax Regime. 6. If you have joined the company before 1st April 2020, and don't choose a tax regime, the existing tax regime is considered by default. 7. If you are a new joiner in the current month, your default Regime would be the Old Regime.						

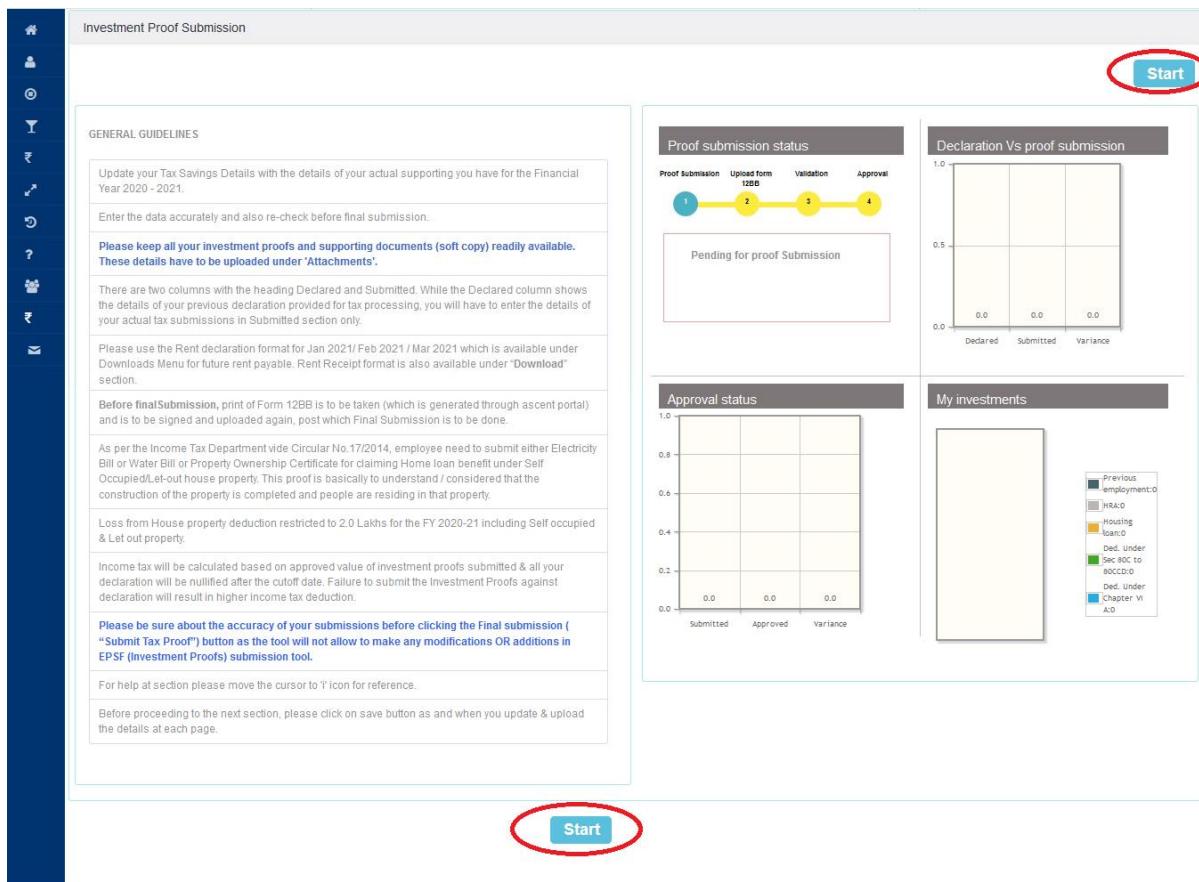
Employee Declaration			
I hereby confirm that I understand the tax rates / tax benefits that are applicable and submitting my declaration of Tax Regime for the Financial year 2020-21			
<input type="radio"/> Old Tax Regime		<input type="radio"/> New Tax Regime	
Submit			

Tax Slabs		
Income Slabs	Old Regime	New Regime
i Where the total income does not exceed Rs.2,50,000/-	NIL	NIL

Figure 4: Employee selects Tax Regime

- Employee views the **Regime Declaration** page along with the general guidelines and selects either Old or New Tax Regime.

Employee clicks Start button to fill the EPSF Details



The screenshot shows the 'Investment Proof Submission' page. On the left, there's a vertical sidebar with various icons. The main content area has several sections:

- GENERAL GUIDELINES:** Includes instructions for updating Tax Savings Details, entering data accurately, and keeping investment proofs ready.
- Proof submission status:** A progress bar with four steps: 'Proof Submission' (1), 'Upload form 12BB' (2), 'Validation' (3), and 'Approval' (4). Step 1 is highlighted in blue, while others are yellow.
- Declaration Vs proof submission:** A chart with three columns: 'Declared', 'Submitted', and 'Variance'. All values are 0.0.
- Approval status:** A chart with three columns: 'Submitted', 'Approved', and 'Variance'. All values are 0.0.
- My investments:** A section with a legend for different investment types: Previous employment, HRA/O, Housing loan/O, Ded. Under Sec 80C to 80U, Ded. Under Chapter VI AIO. The chart area is currently empty.

Two 'Start' buttons are visible at the bottom right of the page, one in each of the two main sections (Approval status and My investments), both circled in red.

Figure 5: Employee click the Start button

- Employee views the **Investment Proof Submission** page along with the general guidelines and clicks the **Start** button.



Note:

- ✓ Two start buttons are available in the Investment Proof Submission page as shown above. Employee can click any of the start button to proceed further.

For employees who has opted for New Tax Regime:



Note:

Employee who has opted **New Tax Regime** at the time of Investment declaration or Proof submission in the current financial year, employee will be able to see **ONLY** below 3 sections in the Proof submission module:

1. Previous Employment tab (In case employee has joined after April)
2. Housing Loan tab - House Property Income/(Loss) - Let Out Property (Sec 24(b))
3. Other Income tab – Other Income (Bank Interest, etc.)



Important Note:

Please choose your regime carefully as you will not be able to change your regime for this financial year again after clicking “**Ok to proceed**”. Once you click “**Ok to proceed**”, you will be re-directed to the investment proof submission page and supporting documents based on your regime selection will be required to be submitted. In case of doubt, please use the dynamic tax calculator to check which regime best suits you and then select the regime.

Employee fills the Personal Details in the application

The screenshot shows the 'Investment Proof Submission' page. At the top right, there's a user profile icon labeled 'Employee'. Below the header, 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'. The 'Personal details' tab is selected. The form contains fields for Employee ID (SLP02364), Gender (Male), Date of Birth (10/02/1991), No of Children (0), Address (Om Sai Ram, Brookefield, Kundalahalli Village, Bangalore 560037), and Family Details (Dependent Name*, Date of birth*, Gender*, Relationship*, School going*, Stay in hostel*, Age*). A 'Save' button is highlighted with a red circle at the bottom of the form. A note at the bottom says: 'Please provide your mobile number, we may call you in case of any clarification w.r.t proof submitted by you'.

Figure 6: Employee fills Personal details

- Once employee clicks the start button, it will be navigated to **Personal details** page as shown above.
- Employee fills all the relevant and mandatory personal information in the form.
- Employee clicks the **Save** button.

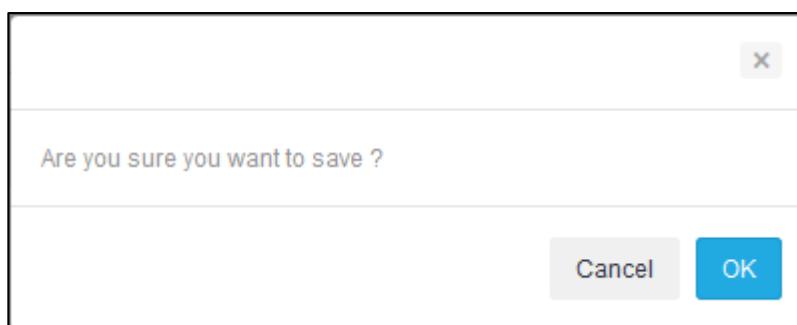


Figure 7: Confirmation dialog box, click OK to proceed

- A Confirmation dialog box appears; click the **Ok** button to save personal details successfully.

The screenshot shows the 'Investment Proof Submission' page. On the left is a sidebar with various HR management links. The main area has tabs for 'Personal details', 'HRA', 'Housing loan', 'Other Income (Bank Interest, etc.)', 'Ded. Under Sec 80C to 80CCD', and 'Ded. Under Chapter VI A'. The 'Personal details' tab is active. It contains fields for Employee ID (SLP02364), Gender (Male), Date of Birth (10/02/1991), No. of Children (0), Employee Name (Ajith), Date of Joining (17/08/2016), PAN (BQCPD4496E), and Mobile Number (9620793665). Below these is an address field: 'Address (Current Residence) *' with the value 'Om Sai Ram, Brookfield Kundalahalli Village Bangalore 560037'. To the right are buttons for 'FAQ' (with a red circle '4'), 'Support' (with a red circle '5'), and 'Policies'. A 'Questions' dropdown says 'Please select FAQ...'. A yellow box highlights the 'Family Details' section, which contains a table with a row for 'Test' (Date of birth: 27/01/1970, Gender: Male, Relationship: Father, School going: No, Stay in hostel: No, Age: 49). There are 'Add' (+) and 'Delete' (-) icons next to the table. A red circle '1' is over the 'Add' icon, and a red circle '2' is over the 'Delete' icon. At the bottom of the 'Family Details' section is a 'Save' button with a red circle '3' and a 'Proceed' button.

Figure 8: Employee adds the family member details and clicks save and proceed button

- Once the **No. of children / Mobile Number / Residence Address** are entered by an employee in the first screen, then once the personal details are saved, employee is eligible to add the family member details as shown above.

Note: Updating Family details are required to be updated for claiming few of the exemptions like LIC, Children Education Expense etc.

1. Employee adds family member details

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

2. Employee deletes the family member details:

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

3. Employee saves all the details:

Employee clicks **Save** button to save the personal and family member details

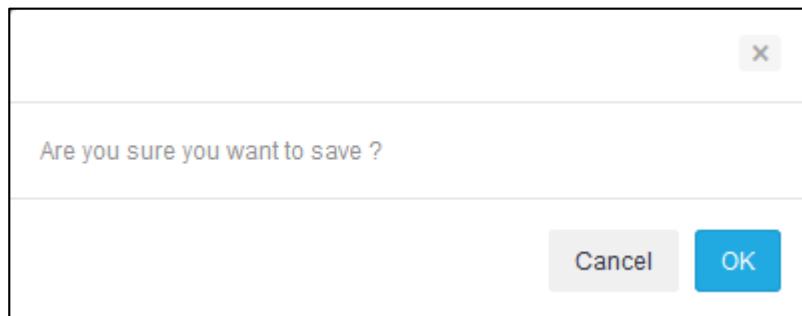


Figure 9: Confirmation dialog box

- A Confirmation dialog box appears; click the **Ok** button to save personal and family details successfully.

4. Employee clicks the FAQ option

Click **FAQ** option in the left corner of the page as shown in the Figure 8: Employee adds the family member details and clicks save and proceed button and views the frequently asked questions regarding the EPSF.

The screenshot shows the 'Personal details' tab selected in the top navigation bar. The employee information is filled out. In the top right, there are three buttons: 'FAQ' (circled in orange), 'Support', and 'Policies'. Below these buttons is a 'Questions:' dropdown menu with the placeholder '--- Please select FAQ ---'. A large orange box encloses the 'Questions:' dropdown and the list of frequently asked questions underneath, which include various tax-related inquiries like HRA exemption, Deductions under Sec 80C to 80CCD, and Ded. Under Chapter VI A.

Figure 10: Employee selects the question from list

- Employee can select the question from questions list, for which he/she needs clarification.



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The screenshot shows the Ascent HR Employee portal interface. On the left is a dark sidebar with various menu items like Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, and Payroll Helpdesk. The main content area has a header "Investment Proof Submission". Below it, there's a summary table with columns for Declared Amount (105600), Submitted Amount (0), and Approved Amount (0). The main form contains sections for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VI A. Under Personal details, there are fields for Employee ID (SLP02364), Gender (Male), Date of Birth (10/02/1991), No of Children (0), Employee Name (Ajith), Date of Joining (17/08/2016), PAN (BQCPD4496E), and Mobile Number (9620793665). An address field shows "Om Sai Ram, Brookefield, Kundahalli Village, Bangalore 560037". A Family Details section is partially visible. On the right, there's a yellow-bordered box containing icons for FAQ, Support, and Policies, and a question "Questions : How much exemption I can c" followed by an answer: "Answer : You can claim maximum exemption of Rs 200000 towards loss from house property inclusive of Self occupied & let-out property."

Figure 11: Employee views the clarification for the question

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

5. Employee click Support action

The screenshot shows the StuHRM software interface. On the left is a dark sidebar with various menu items like Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, Payroll Helpdesk, and Performance Improvement. The main area is titled 'Investment Proof Submission'. It has tabs for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VIA. Below these tabs, there are fields for Employee ID (SLP02364), Gender (Male), Date of Birth (10/02/1991), No of Children (0), Address (Current Residence) (Om Sai Ram, Brookefield, Kundalahalli Village, Bangalore 560037), Employee Name (Ajith), Date of Joining (17/08/2016), PAN (BQCPD4496E), and Mobile Number (9620793665). To the right, there are buttons for Declared Amount (105600), Submitted Amount (0), Approved Amount (0), FAQ, Support (highlighted with a red box), and Policies. A search bar at the bottom right contains the word 'rent'. A red box highlights the 'Support' button and the search results below it.

Figure 12: Employee clicks Support action

- Employee clicks **Support** option as shown in Figure 8: Employee adds the family member details and clicks save and proceed button 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.
- Once employee saves the personal details, then the remaining sections such as **HRA**, **Housing loan**, **Other Income (Bank Interest, etc.)**, **Ded. Under Sec 80C to 80CCD** and **Ded. Under Chapter VIA** sections auto appears on the screen as shown in Figure 6: Employee fills Personal details.

Employee clicks HRA tab and fills the details in the application

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 2021/ Feb 2021 / Mar 2021 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.
- 6. If monthly rent more than Rs.8333 per month or equal to Rs.100000 per annum, then Landlord PAN number has to be submitted.

Months	Declared	Landlord Name	Landlord PAN	Landlord Address	Rented property Address	Rented property City	Rent per month
Apr-20					Select		+
May-20					Select		+
Jun-20					Select		+
Jul-20					Select		+
Aug-20					Select		+
Sep-20					Select		+
Oct-20					Select		+
Nov-20					Select		+
Dec-20					Select		+
Jan-21					Select		+
Feb-21					Select		+
Mar-21					Select		+

Save

Next

Figure 13: Employee fills HRA Details

1. Employee view the **HRA** Page and fills relevant and mandatory information in the form.
2. If employee check the **Copy to All** check box, then the information entered in the single row copies to all the remaining rows.
3. If employee wants to update Multiple Landlord in the HRA section, click on **ADD (+)** button as shown in above figure.
4. Once information is updated, employee clicks the **Save** button. A confirmation dialog box appears as shown below. Click the **Ok** button to save the details successfully. This will prompt you to navigate to the **Housing loan** tab.

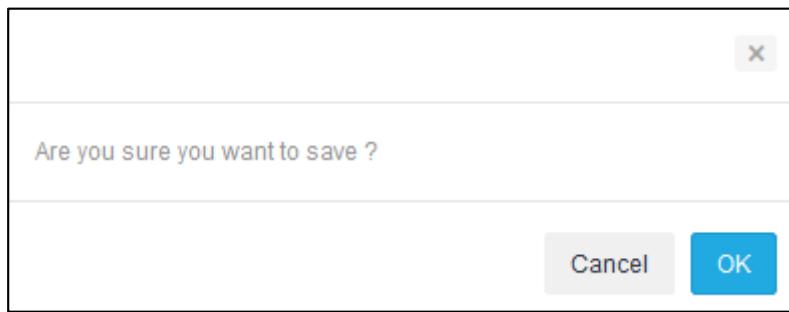


Figure 14: Employee click Ok to save the HRA Details

Employee uploads the document in the application

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

Figure 15: Employee uploads the attachment

- Click the **Upload** button, which is next to HRA line item as shown in above figure to upload the document.
- Employee selects the “**Document Towards**” drop-down to upload the proofs, which shows the bifurcation of document type under each category of investments.
- Click the **Browse** button to select the file from the desired location.
- If file is password protected, enter the file password and then, click the **Upload** button to upload the document successfully.

**Note:**

There are few sections where multiple documents need to be uploaded for approval, in such instances, you shall have an option to select respective document type category in the upload section as shown in the below screenshot.

Example: Interest on Housing loan Self-occupied section – You need to upload both Interest certificate & Possession certificate. Hence upload the document by selecting the correct category i.e., Interest Certificate separately and Possession Certificate separately.

Declared	Proof Submitted	Approved	Remarks
0.00	-160000.00	0.00	

Let Out

Particulars	(Let-out) Property-I
Loan Status	: Active
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	: Financial Institution
Lender Financial Institution Name	: Bank of Baroda (BoB)
Lender Name	: Bank of Baroda (BoB)
Lender PAN	: AAACB1534F
Lender Address	: Mumbai
Rent received type	: deemed
1. Rent received (Please enter Rent received/ receivable for the entire year)	: 150000.00

Supporting documents to be uploaded

Document: HRA (Rent paid) Documents

Document towards :

Select Document type

Quarterly Rent Receipts
Rent Receipt for whole year
Bank Statement
12 receipts for the entire year (Single file)
Rent Declaration (Future Rent payable)

File Password

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

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

Figure 16: Employee selects Document Type

Employee fills Housing loan/House Property Income or Loss details in the application

Under Housing loan section, there are 4 Applications that can 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))
3. Interest on House Property (Sec 80EE)
4. 80EEA

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

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

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 / 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

Loan Status:

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 - 2019-2020:
- 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:

Income / Loss from House Property:

Total Let Out Property:

Buttons:

- Save (1)
- Submit & Preview (2)
- Previous (3)
- Next (4)

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 same separately 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 fills House Property Income/(Loss) details



User Guide for EPSF (Employee) – Standard Document

1. Employee fills all the relevant and mandatory details in the Form / Annexure.
2. Employee can click **Add** icon to add another let out property details in the column as shown below.
3. Once all details are updated, if Employee click the **Save** button, data will be saved & saved details can be edited if required.
4. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.

The screenshot shows the ASCENT HR Employee EPSF submission interface. On the left is a dark sidebar with various menu items. The main area is titled 'Investment Proof Submission' and shows a summary table with columns for Declared Amount (105600), Submitted Amount (7000), and Approved Amount (0). Below this is a 'House Property Income(Loss) - Let Out Property (Sec 24(b))' section. A note at the top says: '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.' Below the note is a table with columns for Declared, Proof Submitted, Approved, and Remarks, all showing 0.00. A large orange box highlights the 'Let Out' section, which contains fields for Particulars, Loan Status, Is the Property a Joint Property, What is the Percentage of Your contribution towards Repayment of Loan, Lender type, Lender Name, Lender PAN, Lender Address, Rent received type, and several input fields for rent received, less municipal taxes, net annual value, standard deduction, interest repayment, and pre EMI paid. At the bottom of the 'Let Out' section are 'Save' and 'Submit & Preview' buttons, and a note: 'Unsaved changes will be lost – please click 'Save' before proceeding'. Below the 'Let Out' section is a note: '1. 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. 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 18: 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?

If employee clicks Submit and Preview button

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

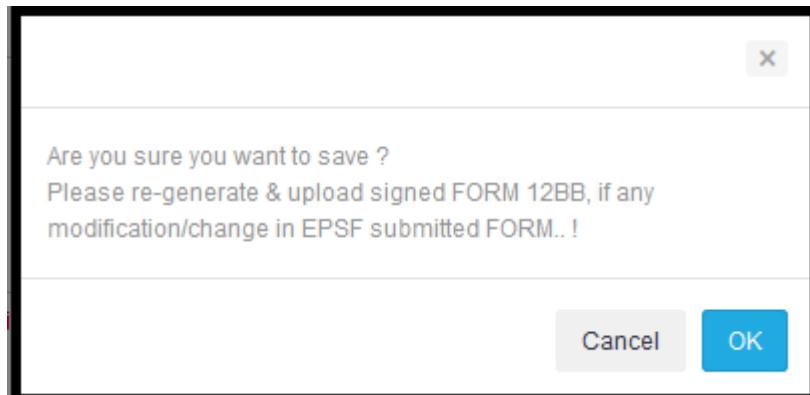


Figure 19: Employee clicks Yes button

- Employee clicks **Ok** button to submit the details and will be navigated to Generate Form 12BB.



User Guide for EPSF (Employee) – Standard Document

Investment Proof Submission

Component	Submitted	Approved
House Rent Receipt Submission (HRA)		
Rent Paid Apr-20	15000.00	0
Rent Paid May-20	15000.00	0
Rent Paid Jun-20	15000.00	0
Rent Paid Jul-20	15000.00	0
Rent Paid Aug-20	15000.00	0
Rent Paid Sep-20	15000.00	0
Rent Paid Oct-20	15000.00	0
Rent Paid Nov-20	15000.00	0
Rent Paid Dec-20	15000.00	0
Rent Paid Jan-21	15000.00	0
Rent Paid Feb-21	15000.00	0
Rent Paid Mar-21	15000.00	0
Housing Loan/House Property/Other Income		
House Property Income/(Loss) - Let Out Property (Sec 24(b))	-200000.00	0
Interest on Housing Loan-Self Occupied Property (Sec 24(b))	0.00	0
Interest on House Property (Sec 80EE)	0.00	0
Interest on Housing Loan - Additional Deduction (Sec 80EEA)	0.00	0
Other Income (Bank Interest, etc.)	0.00	0
Total Investments U/s 80C & 80CC limited up to Rs.1.5 Lakhs + Rs.50000 for additional NPS		
Employees Provident Fund (<i>Auto populated through payroll</i>)		0
Voluntary Provident Fund (<i>Auto populated through payroll</i>)		0
Deduction under Life Insurance Pension Scheme (Sec 80CCC)	0.00	0
Public Provident Fund	0.00	0
Children Education Expenses	0.00	0
National Savings Certificate (NSC)	0.00	0
Life 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 Samridhi Scheme	0.00	0
Long term Infrastructure Bonds (80CCF)	0.00	0
Accrued NSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Employee's contribution towards NPS	0.00	0
Other Permitted Exemptions (Section 80D to 80U)		
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 80DD)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DBB)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DDB)	0.00	0
Interest Paid on Higher Education Loan (Sec 80E)	0.00	0
Deduction for Permanent Disability (Sec 80U)	0.00	0
Tax Exemption on Loan for Purchase of Electric Vehicles (Sec 80EEB)	0.00	0
Uploading Form 12BB		
<input checked="" type="radio"/> Yes (Document upload)		
<input type="radio"/> No (Self declaration)		
Browse... [file selected]		
Upload		
Generate Form 12BB		
Proof Submission Declaration <input 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.		
Submit Tax Proof		
Please Note: No alteration or modification allowed in EPSF (Investment Proofs) tool once you submit the "Submit Tax Proof" button. Self attested 12BB only should be uploaded, Else will not be considered		

Figure 20: Employee views the Summary of Investment Proof Submitted & click Yes



Note:

If in case there are any modifications in the EPSF forms, please make the changes before clicking **Submit Tax Proof** to submit it.



- As shown in above figure 20, If Employee ticks “**Yes (Document Upload)**” and clicks on “**Generate Form 12 BB button**” which will generate the document in PDF format as shown in below figure 21.



User Guide for EPSF (Employee) – Standard Document

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	6000.00	Rent receipts / Rental Agreement / Bank statement
		(ii) Name of the landlord		
		1. test		
		(iii) Address of the landlord		
		1. 100ft road, ecity		
		(iv) Permanent Account Number of the landlord		
		1. GXCPR4594P		
		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	5700.00	Photo Copy of passbook
		Children Education Expenses	84000.00	Photo copy of the Tuition Fees paid receipt
		National Savings Certificate (NSC)	14345.00	Photo Copy of National Saving Certificates
		Housing Loan Principal Repayment	45000.00	Housing Loan certificate from Bank / Bank statement
		Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years	30000.00	Photo copy of the Passbook / Photo copy of the Term Deposit receipt
		Sukanya Samridhi Scheme	56000.00	Photocopy of the Passbook / certificate
		Long term Infrastructure Bonds (80CCF)	360000.00	
		Accrued NSC Interest	12000.00	Photo Copy of previous year National Saving Certificates
		Mutual Funds / ULIP	44796.00	Photo copy of Payment receipt / Account statement / Certificate / Bond

Ecode : TESTEMP027			
	Rajiv Gandhi Equity Savings Scheme (80CCG)	400000.00	Photo copy of the Bond certificate / statement
	(ii) Life Insurance Pension Scheme (Section 80CCC)	170000.00	Photo Copy of premium receipt
	(iii) Employee's contribution towards NPS (Section 80CCD)	40000.00	Photo Copy of contribution NPS certificate
	(B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.		
	Medical for Handicapped Dependents (Sec 80DD)	30000.00	Photocopy of certificate/ original medical bills / Form 10IA
	Medical for Specified Diseases (Sec 80DDB)	20000.00	Scan copy of certificate/ Original medical bills
	Interest On Deposits In Saving Accounts (80TTA)	10000.00	
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 :	Full Name: TESTEMP 027		

Figure 21: Employee adds the signature in the form.

- Employee prints the document & adds the signature in the form.
- Employee clicks on **Browse** button to upload the Scan copy of Signed Form 12BB on portal as shown in Figure 20.
- Employee clicks Upload button.

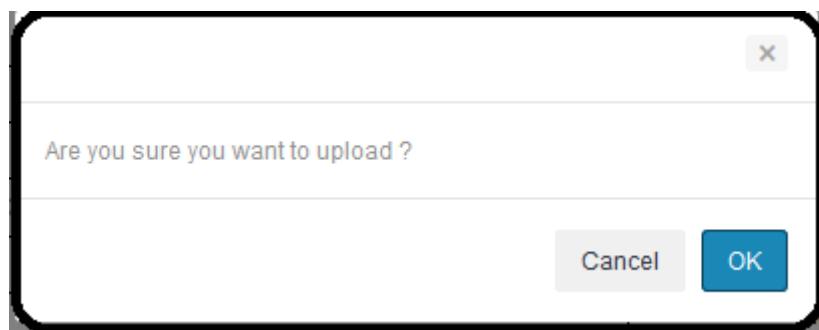


Figure 22: Confirmation dialog box appears

- Employee click **OK** button to upload the file.
- Once employee uploads the file, then **Submit Tax proof** button appears on the screen as shown above.

Investment Proof Submission

Component	Submitted	Approved
House Rent Receipt Submission (HRA)		
Rent Paid Apr-20	15000.00	0
Rent Paid May-20	15000.00	0
Rent Paid Jun-20	15000.00	0
Rent Paid Jul-20	15000.00	0
Rent Paid Aug-20	15000.00	0
Rent Paid Sep-20	15000.00	0
Rent Paid Oct-20	15000.00	0
Rent Paid Nov-20	15000.00	0
Rent Paid Dec-20	15000.00	0
Rent Paid Jan-21	15000.00	0
Rent Paid Feb-21	15000.00	0
Rent Paid Mar-21	15000.00	0
Housing Loan/House Property/Other Income		
House Property Income/(Loss) - Let Out Property (Sec 24(b))	-200000.00	0
Interest on Housing Loan-Self Occupied Property (Sec 24(b))	0.00	0
Interest on House Property (Sec 80EE)	0.00	0
Interest on Housing Loan - Additional Deduction (Sec 80EEA)	0.00	0
Other Income (Bank Interest, etc.)	0.00	0
Total Investments Us 80C & 80CCC limited up to Rs.1.5 Lakhs + Rs.50000 for additional NPs		
Employees Provident Fund (<i>Auto populated through payroll</i>)		0
Voluntary Provident Fund (<i>Auto populated through payroll</i>)		0
Deduction under Life Insurance Pension Scheme (Sec 80CCC)	0.00	0
Public Provident Fund	0.00	0
Children Education Expenses	0.00	0
National Savings Certificate (NSC)	0.00	0
Life 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 Samridhi Scheme	0.00	0
Long term Infrastructure Bonds (80CCF)	0.00	0
Accrued NSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Employee's contribution towards NPS	0.00	0
Other Personal Exemptions (Sec 80D, 80DDB, 80D)		
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 80DD)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DB)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DBB)	0.00	0
Interest Paid on Higher Education Loan (Sec 80E)	0.00	0
Deduction for Permanent Disability (Sec 80U)	0.00	0
Tax Exemption on Loan for Purchase of Electric Vehicles (Sec 80EEB)	0.00	0

Uploading Form 12 BB

Yes (Document upload) No (Self declaration)

12BB Self Declaration

I declare that the information given in FORM 12BB is true & correct. I undertake to inform immediately of any changes to the above facts. Any income tax liability arising out of wrong declaration will be my responsibility and I acknowledge this declaration as alternate for the Signed Form 12 BB upload.

Proof Submission 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.

Please Note:
No alteration or modification allowed in EPSF (Investment Proofs) tool once you submit the "Submit Tax Proof" button.

Submit Tax Proof

Figure 23: Employee views the Summary of Investment Proof Submitted & click **No**

 **Note:**

If in case there are any modifications in the EPSF forms, please make the changes before clicking **Submit Tax Proof** to submit it.

- As shown in above figure 23, If Employee ticks “**No (Self Declaration)**”, than employee need not submit / upload Scan copy of Form 12 BB.
- Employee checks both **12BB Self Declaration** tab and **Proof Submission Declaration** tab as shown in Figure 23.
- Finally, employee clicks on **Submit Tax Proof** button. Once clicked, **any alteration or modification will not be allowed in EPSF tool**.

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

The screenshot shows the 'Interest on Housing Loan-Self Occupied Property (Sec 24(b))' form. At the top, there are summary boxes for Declared Amount (10000), Submitted Amount (7000), and Approved Amount (0). Below this, a note states: '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 / consider that the construction of the property is completed and people are residing in that property.'

The form includes the following sections:

- Personal details:** HRA, Housing loan, Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCD Ded. Under Chapter VIA.
- House Property Income(Loss) - Let Out Property (Sec 24(b)):**
 - Interest on Housing Loan Self Occupied Property (Sec 24(b))
 - Interest on House Property (Sec 80E)
- 80EA:** Declared (0.00), Proof Submitted (0.00), Approved (0.00), Remarks (empty).
- Self Occupied:**
 - Is the Property a Joint Property: -selected-
 - What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes: 0
 - Loan Sanctioned year: 2019
 - Month and Year of completion of construction of the Property/Possession of House Property: 01 2019 (Cannot be later than March - 2020)
 - Lender type: -selected-
 - Lender Name: (empty)
 - Lender PAN: (empty)
 - Lender Address: (empty)
 - Interest repayment made in the current year: 0
 - Pre EMI paid in any in the current year other than regular interest repayment: 0
 - Do you have any Pre EMI pertaining to the previous FYs: -select-
 - Do you wish to submit the rent paid details?: -select-

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/-

At the bottom, there are navigation buttons: 1. Save (highlighted with a red circle), 2. Submit & Preview, 3. Next, 4. Previous. A note says 'Save' before proceeding to the next section.

Figure 24: Employee fills Housing Loan-Self Occupied Property details

- Employee fills all the relevant and mandatory details in the Form / Annexure
- Once all details are updated, if Employee click the **Save** button, data will be saved & saved details can be edited if required.

5. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.
 3. Employee clicks the **Next** button to navigate to the **next** form.
 4. Employee clicks the **previous** button to navigate to the **previous** form.
- **Declared Amount:** displays the amount which employee has declared.
 - **Proof Submitted:** displays the amount for which the proofs are submitted.
 - **Approved:** displays the amount that has been approved by the approver.
 - **Remarks:** Displays the remarks.

Employee Fills Interest on Interest House property (Sec 80EE)

The screenshot shows the ASCENT HR software interface with the following details:

- Left Sidebar:** Includes links for Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, Payroll Helpdesk, Performance Improvement Plan, Confirmation, Tax & Reimbursement, Submit tax proof, Downloads, and Asset Management.
- Header:** Shows the ASCENT HR logo and the word "Employee".
- Top Bar:** Buttons for Declared Amount (105600), Submitted Amount (9000), and Approved Amount (0).
- Section:** Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, Ded. Under Chapter VI A.
- Sub-section:** Show only declared items (checkbox checked).
- Form Fields:**
 - House Property Income(Loss) - Let Out Property (Sec 24DII):** Declared 0.00, Proof Submitted 2000.00, Approved 0.00.
 - Interest on Housing Loan-Self Occupied Property (Sec 24DBI):** Declared 0.00, Proof Submitted 0.00, Approved 0.00.
 - Interest on House Property (Sec 80EE):** Declared 0.00, Proof Submitted 2000.00, Approved 0.00.
- Note:** Please use the Annexures 'Click here to update' to enter all relevant details pertaining to House Property.
- Annexure:** Interest on House Property (Sec 80EE)
 - 1. Loan Sanctioned Date: 12/02/2018
 - 2. Housing Loan availed amount: 555.00
 - 3. Value of residential house property: 5555.00
 - 4. Are you holding any other Residential property: No
 - 5. Interest on House Property: 2000.00
- Buttons:** Save (1), Submit & Preview (2), Previous (4), Next (3).
- Right Panel:** Attachments (0 out of 2 are uploaded, 2 are pending), Support, Document List, Document for HRA (Rent paid) Documents, and Interest on House Property (Sec 80EE) - additional benefit of INR 50,000/-.

Figure 25: Employee Fills Interest on Interest House property (Sec 80EE)

1. Employee fills all the relevant and mandatory details in the Form / Annexure.

2. Once all details are updated, if Employee click the **Save** button, data will be saved & saved details can be edited if required.
3. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.
4. Employee clicks the **Next** button to navigate to the **next** form.
5. Employee clicks the **previous** button to navigate to the **previous** form.

Employee fills 80EEA

The screenshot shows the ASCENT HR software interface. On the left, there's a dark blue sidebar with various menu items such as Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, Payroll Helpdesk, Performance Improvement Plan, Confirmation, Tax & Reimbursement, Submit tax proof, Downloads, and Asset Management.

The main content area is titled "Investment Proof Submission". It has tabs for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VI A. The "Housing loan" tab is selected.

Under "House Property Income(Loss) - Let Out Property (Sec 24(b))", there's a table with columns: Declared Amount (105600), Submitted Amount (9000), and Approved Amount (0).

Under "Interest on House Property (Sec 80EEA)", there's a table with columns: Declared, Proof Submitted, Approved, and Remarks. The values are 0.00, 0.00, 0.00, and an empty field respectively.

On the right side, there are sections for Attachments (0 out of 2 are uploaded, 2 are pending), Document List, and Document for HRA (Rent paid) Documents and Interest on House Property (Sec 80EEA) - additional benefit of INR 50,000/-.

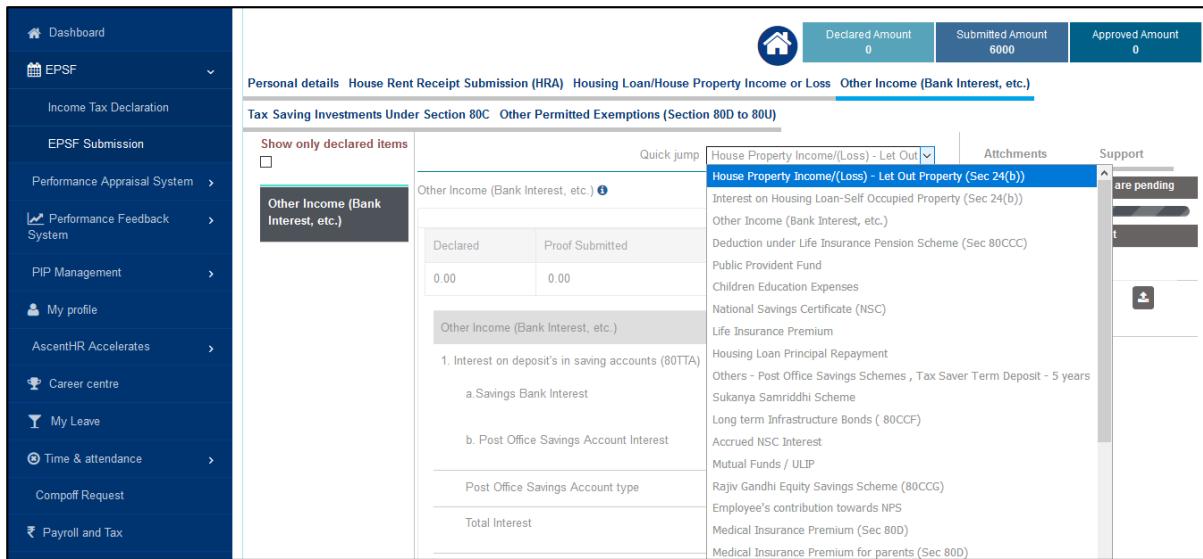
At the bottom, there are four numbered buttons: 1. Save (highlighted with a red circle), 2. Submit & Preview (highlighted with a red circle), 3. Next (highlighted with a red circle), and 4. Previous.

Figure 26: Employee fills 80EEA

1. Employee fills all the relevant and mandatory details in the Form / Annexure
2. Once all details are updated, if Employee click the **Save** button, data will be saved & saved details can be edited if required.

3. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.
4. Employee clicks the **Next** button to navigate to the **next** form.
5. Employee clicks the **previous** button to navigate to the **previous** form.

Employee can fill the specific application through the quick jump option



The screenshot shows the AscentHR EPSF submission interface. On the left, a sidebar menu includes options like Dashboard, EPSF, Income Tax Declaration, EPSF Submission, Performance Appraisal System, Performance Feedback System, PIP Management, My profile, AscentHR Accelerates, Career centre, My Leave, Time & attendance, Compoff Request, and Payroll and Tax. The 'EPSF' option is currently selected. The main content area displays a table for 'Other Income (Bank Interest, etc.)'. The table has two columns: 'Declared' and 'Proof Submitted'. There are three rows: 1. Interest on deposit's in saving accounts (80TTA) - a Savings Bank Interest; 2. b. Post Office Savings Account Interest; 3. Post Office Savings Account type. At the top of the table, there are tabs for Personal details, House Rent Receipt Submission (HRA), Housing Loan/House Property Income or Loss, Other Income (Bank Interest, etc.), Tax Saving Investments Under Section 80C, and Other Permitted Exemptions (Section 80D to 80U). A 'Quick jump' dropdown is open, showing the option 'House Property Income/(Loss) - Let Out Property (Sec 24(b))' which is highlighted with a blue border. Other options in the dropdown include Interest on Housing Loan-Self Occupied Property (Sec 24(b)), Other Income (Bank Interest, etc.), Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC), Life Insurance Premium, Housing Loan Principal Repayment, Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years, Sukanya Samridhi Scheme, Long term Infrastructure Bonds (80CCF), Accrued NSC Interest, Mutual Funds / ULIP, Rajiv Gandhi Equity Savings Scheme (80CCG), Employee's contribution towards NPS, Medical Insurance Premium (Sec 80D), and Medical Insurance Premium for parents (Sec 80D).

Figure 27: 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.

Employee fills the Other Income (Bank Interest, etc.) Details in the application

The screenshot shows the Ascent HR Employee Portal interface. On the left is a dark blue sidebar with various menu items such as Dashboard, EPSF, Income Tax Declaration, EPSF Submission, Performance Appraisal System, etc. The main content area is titled 'Investment Proof Submission' under 'Other Income (Bank Interest, etc.)'. It shows a table with columns: Declared, Proof Submitted, Approved, and Remarks. Below this is a detailed list of interest types and their values:

Other Income (Bank Interest, etc.)			
	Declared	Proof Submitted	Approved
1. Interest on deposit's in saving accounts (80TTA)	9000	6000	0
a. Savings Bank Interest	9000	6000	0
b. Post Office Savings Account Interest	0	0	0
Post Office Savings Account type	Single : <input checked="" type="radio"/> Joint : <input type="radio"/>		
Total Interest	15000	10000	5000
Less: Exemption U/s 80TTA	10000	5000	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	20000	0	0
3. Interest on Fixed deposit	4000	0	0
4. If any other Income	0	0	0
5. Tax recovered on other Income	30000	0	0
Total	59000	0	0

At the bottom, there are four numbered buttons: 1. Save, 2. Submit & Preview, 3. Next, and 4. Previous.

Figure 28: Employee fills the Other income application

1. Employee fills all the relevant and mandatory details in the Form / Annexure
2. Once all details are updated, if Employee click the **Save** button, data will be saved & saved details can be edited if required.
3. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.
4. Employee clicks the **Next** button.



Data saved! You will be directed to the next page.
<input type="button" value="OK"/>

Figure 29: Employee click Ok Button

- Employee clicks the **Ok** button to navigate to Tax Saving Investments under Section 80C.
- Employee clicks the **Previous** button to navigate to the **previous** form.

Employee fills the Ded. Under Section 80C to 80CCD details in the application

Under Section 80C to 80CCD, 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. Life 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



Note:

Deductions that are recovered from payroll, proof documents are not required to be submitted & exemption will be given automatically like **Provident Fund, Voluntary Provident Fund etc.**

Employee fills Deduction under Life Insurance Pension Scheme (Sec 80CCC)] form

The screenshot shows the 'Investment Proof Submission' page. On the left, there's a vertical sidebar with icons for Home, Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VIA. The main content area has tabs for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VIA. The 'Ded. Under Sec 80C to 80CCD' tab is selected. It displays a table for 'Deduction under Life Insurance Pension Scheme (Sec 80CCC)'. The table has columns for Declared, Proof Submitted, Approved, and Remarks. A value of 0.00 is entered in the Declared column. Below the table, there's a note about photo copies of premium receipts and a 'Save' button with a red circle containing the number 1. To the right, there's a sidebar for attachments (0 out of 5 uploaded, 5 pending), a document list for HRA (Rent paid) Documents, House Property Income/(Loss) - Let Out Property (Sec 24(b)) - 455000.00, and Pension Scheme (Sec 80CCC).

Figure 30: Employee fills the Deduction under life insurance pension scheme

1. Employee enters the **Deduction under Life Insurance Pension Scheme (Sec 80CCC)** value in textbox and if Employee click the **Save** button, data will be saved & saved details can be edited if required.
2. If Employee clicks the **Submit & Preview** button, this will take employee to Form 12BB page.

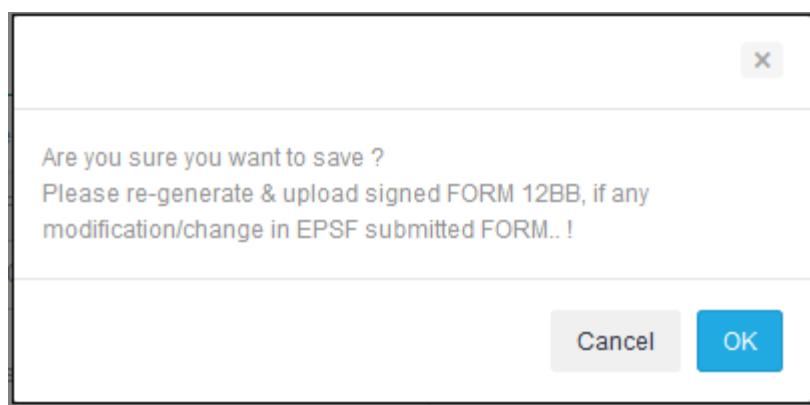


Figure 31: Confirmation dialog box appears

- A confirmation dialog box appears, click the **OK** button.

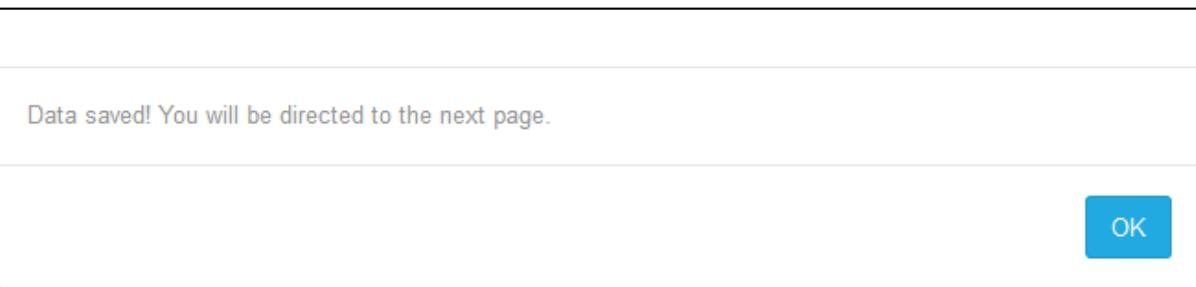
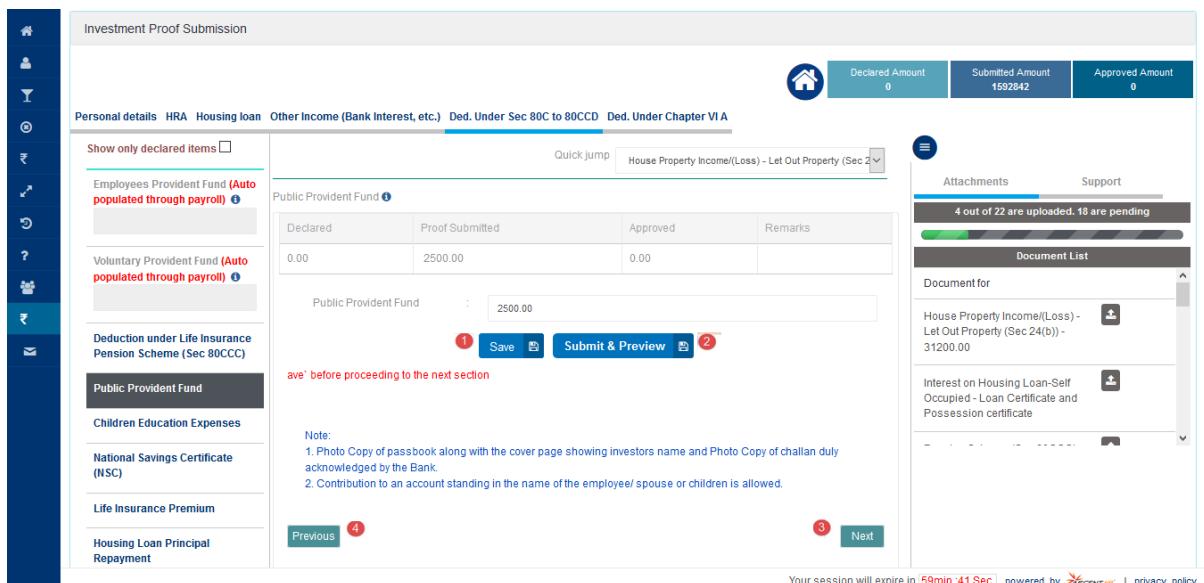


Figure 32: Confirmation dialog box appears for data saving

- Employee clicks the **OK** button to navigate to the next page.
- 4. Employee can also click **Next** button to navigate to **next** page.
- 5. Employee clicks the **Previous** button to navigate to the **previous** form.

Employee fills the Public Provident Fund details in the form



The screenshot shows the 'Investment Proof Submission' page. On the left, a vertical sidebar lists various financial categories: Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, Ded. Under Chapter VIA, Employees Provident Fund (Auto populated through payroll), Voluntary Provident Fund (Auto populated through payroll), Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC), Life Insurance Premium, and Housing Loan Principal Repayment.

The main section is titled 'Public Provident Fund'. It contains a table with columns: Declared, Proof Submitted, Approved, and Remarks. A single row shows values: 0.00, 2500.00, 0.00, and an empty Remarks field. Below the table is a text input field labeled 'Public Provident Fund' with the value '2500.00'. To the right of the input field are two buttons: 'Save' (marked with a red circle 1) and 'Submit & Preview' (marked with a red circle 2). A note below the input field says 'Save before proceeding to the next section'.

On the right side of the page, there is a sidebar with sections for 'Attachments' (4 out of 22 are uploaded, 18 are pending) and 'Document List' (House Property Income/(Loss) - Let Out Property (Sec 24(b)) - 31200.00, Interest on Housing Loan-Self Occupied - Loan Certificate and Possession certificate). At the bottom right, it says 'Your session will expire in 59min 41 Sec'.

Figure 33: Employee fills the Public provident fund details

1. Employee enters the **Public Provident Field** value in the text box.
2. Employee clicks the **Save** button to save the details or click the **Submit and preview** button to submit the details.
3. Employee clicks the **Next** Button to navigate to the **Children education expenses** form.

Employee fills the Children Education Expenses details in the form

The screenshot shows the EPSF Submission interface. On the left, a sidebar lists various HR modules. The main area is titled 'Children Education Expenses'. It contains a table with columns: Declared, Proof Submitted, Approved, and Remarks. Below this is another table for 'Children Education Expenses' with columns: Dependant Name, Children Name, No of Documents, and Amount Due. Two rows are shown in this table, each with dropdown menus for dependant name and children name, and input fields for documents and amount due. The second row has values: kavitha, - select -, 2, 80000. The third row has values: kavitha, - select -, 3, 4000. At the bottom, there are buttons for 'Save' (1), 'Submit & Preview' (2), 'Previous' (4), and 'Next' (3). A note at the bottom provides instructions for tuition fees.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Dependant Name	Children Name	No of Documents	Amount Due
kavitha	- select -	2	80000
kavitha	- select -	3	4000

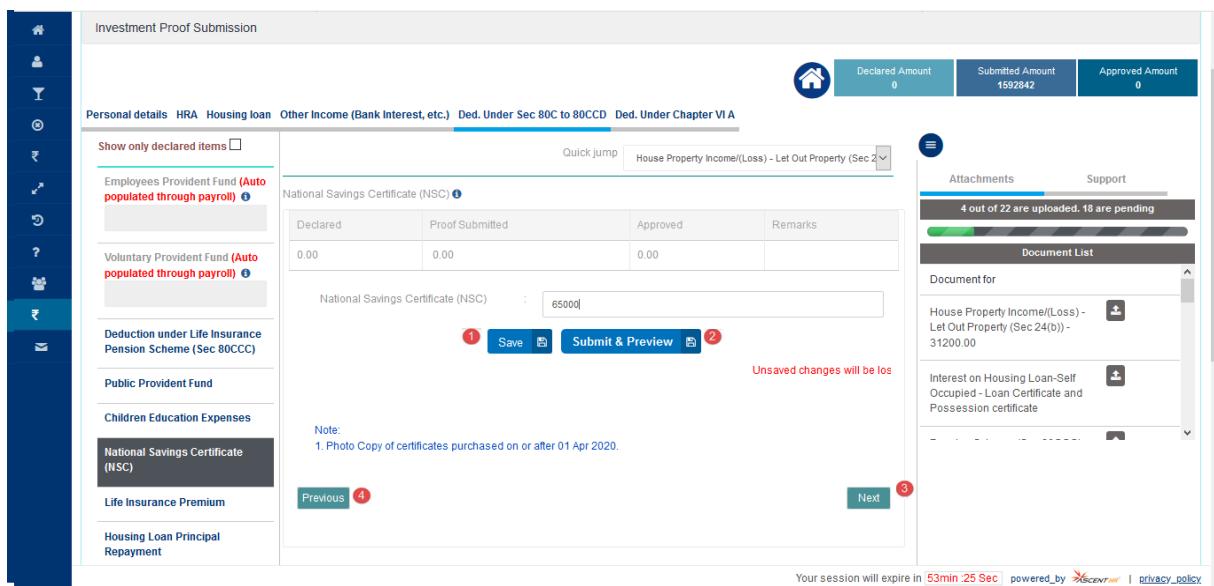
Note:

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.

Figure 34: Employee fills the Children education expenses details

1. Employee enters the **Children Education expense** value in the textbox.
2. Employee clicks the **Save** button to save the details or click the **Submit and preview** button to submit the details.
3. Employee clicks the **Next** Button to navigate to the **National savings certificate** form.

Employee fills the National saving certificate details in the form



The screenshot shows the 'Investment Proof Submission' page. On the left, a sidebar lists various financial categories: 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 (Auto populated through payroll), Voluntary Provident Fund (Auto populated through payroll), Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC) (selected), Life Insurance Premium, and Housing Loan Principal Repayment.

The main area displays 'National Savings Certificate (NSC)' details:

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

A text input field for 'National Savings Certificate (NSC)' contains the value '65000'. Below the input field are two buttons: 'Save' (with a red circle containing '1') and 'Submit & Preview' (with a red circle containing '2'). A note below the input field states: 'Note: 1. Photo Copy of certificates purchased on or after 01 Apr 2020.' To the right of the input field, a message says 'Unsaved changes will be lost' with a red circle containing '3'. At the bottom left is a 'Previous' button (with a red circle containing '4'), and at the bottom right is a 'Next' button (with a red circle containing '3').

The top right of the page shows summary statistics: Declared Amount 0, Submitted Amount 1592842, and Approved Amount 0. The right side of the screen features a sidebar with 'Attachments' (4 out of 22 are uploaded, 18 are pending), 'Support', 'Document List', and 'Document for' sections listing 'House Property Income/(Loss) - Let Out Property (Sec 24(b)) - 31200.00' and 'Interest on Housing Loan-Self Occupied - Loan Certificate and Possession certificate'.

Figure 35: Employee fills the national savings certificate details

- Employee types the **National savings certificate** value in the text box.
- Employee clicks the **Save** button to save the details or click the **Submit and preview** button to submit the details.
- Employee clicks the **Next** Button to navigate to the **life Insurance Premium** form.

Employee fills Life Insurance Premium details in the form

The screenshot shows the 'Investment Proof Submission' page under the 'Personal details' tab. The 'Life Insurance Premium' section is highlighted with a yellow box. It contains two sets of input fields for dependent details: one for 'Declared' and one for 'Proof Submitted'. The 'Declared' section has values: Dependent Name (Ajith), Policy Number (12315), Policy Holder (Ajith), Premium Type (Quarterly), Relationship (Self), and Date (empty). The 'Proof Submitted' section has values: Dependent Name (- select -), Policy Number (- select -), Policy Holder (- select -), Premium Type (Quarterly), Relationship (- select -), and Date (empty). Below these sections are notes and buttons for saving, previewing, and navigating.

Section	Field	Value
Declared	Dependent Name	Ajith
	Policy Number	12315
Proof Submitted	Dependent Name	- select -
	Policy Number	- select -

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 2019 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.

Buttons:

- Save
- Submit & Preview
- Next
- Previous

Figure 36: Employee fills Insurance premium details

- Employee fills the Dependent name, policy number, premium type, relationship date, No. of documents and amount value in the respective textbox.
- Employee clicks the **Save** button to save the details.
- Employee click the **submit and preview** button to submit the details.
- Click the **Next** Button to navigate to the **Housing Loan Principal Repayment** form.

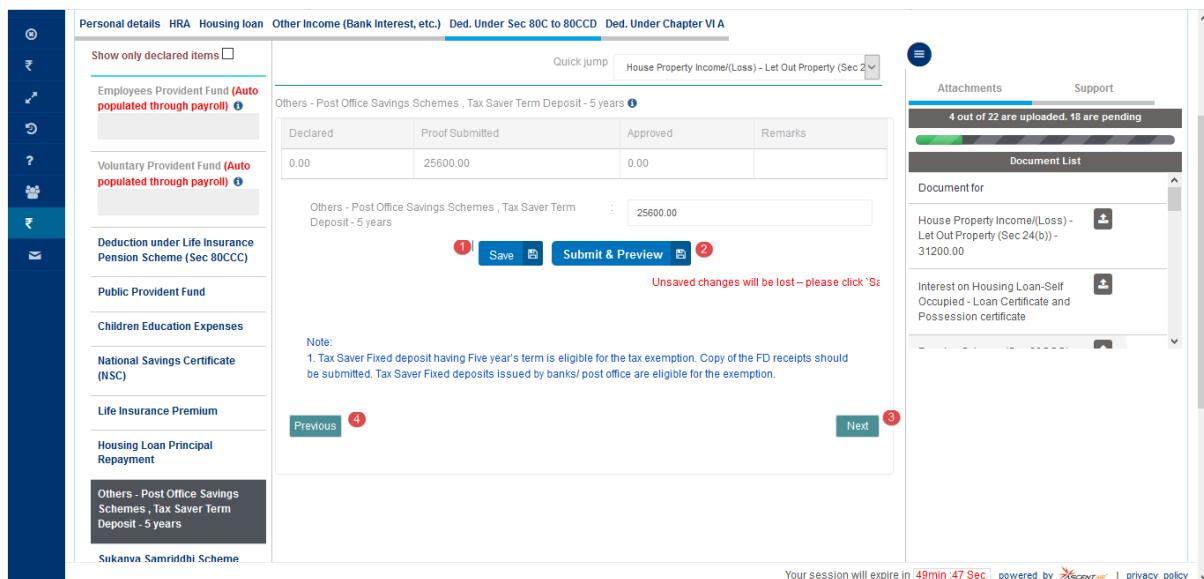
Employee fills Housing Loan Principal Repayment details

The screenshot shows the StoveHRM software interface. On the left is a dark blue sidebar with various menu items like Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, Payroll Helpdesk, Performance Improvement Plan, Confirmation, Tax & Reimbursement, and Asset Management. The main area has a light blue header 'Investment Proof Submission' with 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 this is a table with columns Declared, Proof Submitted, Approved, and Remarks. The 'Housing Loan Principal Repayment' row has a value of 450000 in the Declared column. At the bottom of the form, there are 'Save' and 'Submit & Preview' buttons. A note above the buttons says 'Click 'Save' before proceeding to the next screen.' To the right of the form is a sidebar with sections for Attachments (0 out of 2 are uploaded, 2 are pending), Document List, and links for HRA (Rent paid) Documents and Interest on House Property (Sec 80EE). The top right corner shows the user profile 'Employee'.

Figure 37: Employee fills the Housing loan principal repayment

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

Employee fills Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years details in the form



The screenshot shows the 'Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years' form. The 'Declared' field contains '0.00', 'Proof Submitted' contains '25600.00', and 'Approved' contains '0.00'. Below the table, a note states: '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.' At the bottom, there are 'Save' and 'Submit & Preview' buttons, along with 'Previous' and 'Next' navigation buttons. The sidebar on the left lists various deduction categories, and the right sidebar shows document attachments and a list of other documents.

Figure 38: Employee fills the others- post office savings scheme details

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

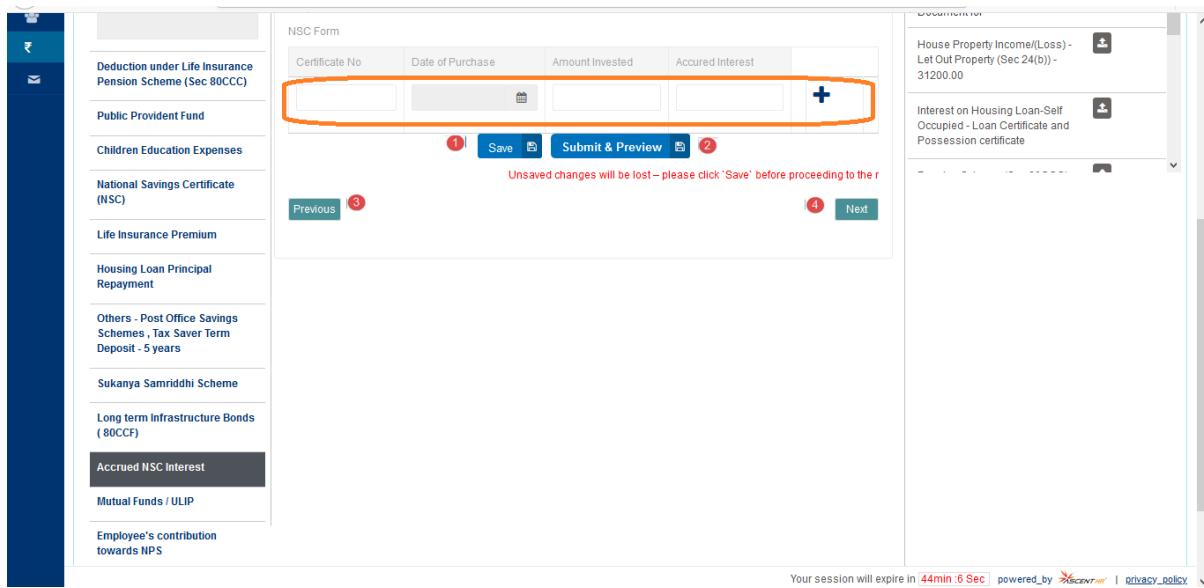
Employee fills the Sukanya Samriddhi Scheme details in the form

The screenshot shows the EPSF Submission interface. On the left, a sidebar lists various HR modules. The main area is titled 'Sukanya Samriddhi Scheme' and contains a table for entering scheme details. The table has columns for 'Declared', 'Proof Submitted', 'Approved', and 'Remarks'. Below the table is a grid for dependents with columns for 'Dependent Name', 'Daughters Name', 'Account Number', and 'Amount Invested'. 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'. At the bottom right of the form area, there are 'Save' and 'Submit & Preview' buttons, both circled in orange. To the right of the form, there are sections for 'Attachments' (0 out of 8 uploaded, 8 are pending) and 'Support' (Document List). A 'Next' button is also circled in orange.

Figure 39: Employee fills the Sukanya Samriddhi scheme details

1. Employee fills 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 clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
5. Click the **Next** Button to navigate to **Accrued NSC Interest** form.

Employee fills the Accrued NSC Interest details in the form.

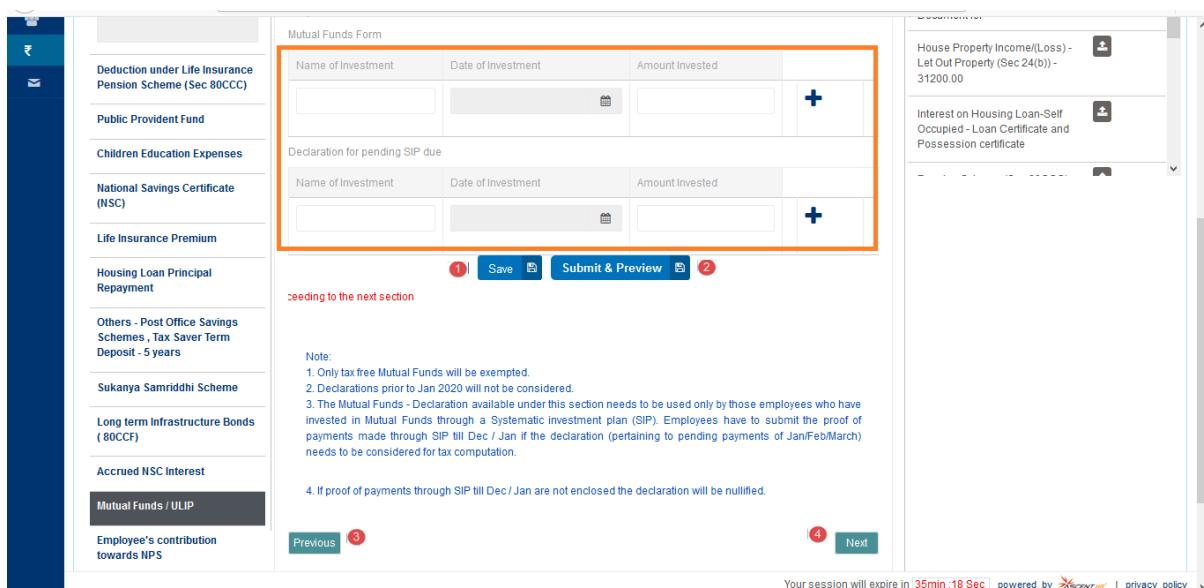


The screenshot shows a web-based application for filling out an NSC form. On the left, there's a sidebar with various financial schemes listed: Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC), Life Insurance Premium, Housing Loan Principal Repayment, Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years, Sukanya Samridhi Scheme, Long term Infrastructure Bonds (80CCF), Accrued NSC Interest (which is highlighted in dark blue), Mutual Funds / ULIP, and Employee's contribution towards NPS. The main area is titled 'NSC Form' and contains fields for 'Certificate No', 'Date of Purchase', 'Amount Invested', and 'Accrued Interest'. A red '+' icon is located at the bottom right of the input field for 'Accrued Interest'. Below the form are buttons for 'Save' (with a red '1' icon), 'Submit & Preview' (with a red '2' icon), 'Previous' (with a red '3' icon), and 'Next' (with a red '4' icon). A message at the bottom says 'Unsaved changes will be lost – please click "Save" before proceeding to the r'. On the right side, there's a vertical panel titled 'Documentation' containing links to 'House Property Income/(Loss) - Let Out Property (Sec 24(b)) - 31200.00' and 'Interest on Housing Loan-Self Occupied - Loan Certificate and Possession certificate'. At the bottom of the page, a session timer says 'Your session will expire in 44min : 6 Sec' and includes links for 'powered_by ASCENTHR | privacy_policy'.

Figure 40: Employee fills Accrued NSC Interest details

1. Employee fills 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.
4. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
5. Click the **Next** Button to navigate to **Mutual Funds / ULIP** form.

Employee fills the Mutual Funds / ULIP details in the form



Mutual Funds Form

Name of Investment	Date of Investment	Amount Invested	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Declaration for pending SIP due

Name of Investment	Date of Investment	Amount Invested	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Save Submit & Preview Next

Proceeding to the next section

Note:

- Only tax free Mutual Funds will be exempted.
- Declarations prior to Jan 2020 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.

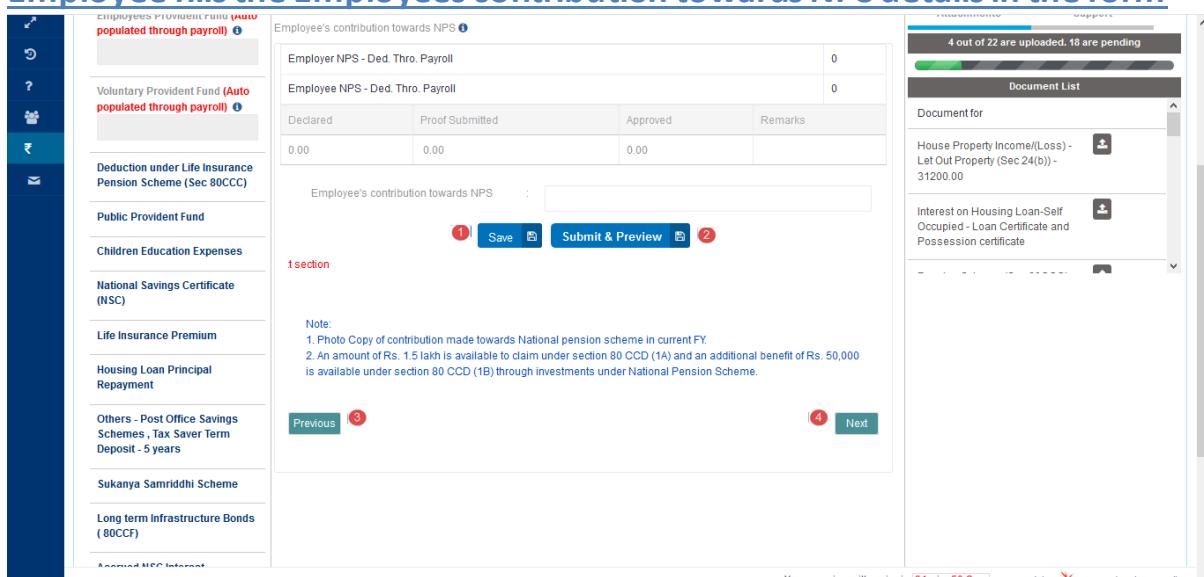
Previous Next

Your session will expire in 35min :18 Sec | powered_by ASCENTHR | [privacy_policy](#)

Figure 41: Employee fills the Mutual Funds/ULIP details

- Employee fills all the relevant and mandatory details in the form.
- Employee can add one more row by clicking on the **Add** icon to add another Mutual fund details.
- Employee can delete the row by clicking on the **Delete** icon.
- Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
- Click the **Next** Button to navigate to **NPS form**.

Employee fills the Employees contribution towards NPS details in the form



The screenshot shows the 'Employee's contribution towards NPS' section of the EPSF (Employee) - Standard Document. On the left, a vertical sidebar lists various financial schemes: Employees Provident Fund (Auto populated through payroll), Voluntary Provident Fund (Auto populated through payroll), Deduction under Life Insurance Pension Scheme (Sec 80CCC), Public Provident Fund, Children Education Expenses, National Savings Certificate (NSC), Life Insurance Premium, Housing Loan Principal Repayment, Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years, Sukanya Samridhi Scheme, and Long term Infrastructure Bonds (80CCF). The main form area contains fields for Employer NPS - Ded. Thro. Payroll (0), Employee NPS - Ded. Thro. Payroll (0), Declared (0.00), Proof Submitted (0.00), Approved (0.00), and Remarks. Below these are sections for 'Employee's contribution towards NPS' (with a note about section 80CCC) and 'Section 80D to 80U'. At the bottom are 'Save' and 'Submit & Preview' buttons, along with 'Previous' and 'Next' navigation buttons. A sidebar on the right shows a document list with 4 out of 22 uploaded documents.

Figure 42: Employee fills Employee contribution towards NPS details

1. Employee fills the Employee contribution towards NPS value in textbox.
2. Employee clicks the **Save** button to save the details successfully or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Other Permitted Exemptions (Section 80D to 80 U)** section.

Employee fills the Ded. Under Chapter VI A (Section 80D to 80 U) in application

Under Ded. Under Chapter VI A (Section 80D to 80 U) section, there are 11 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. 80EEB : Interest paid on Purchase of Electric Vehicle for current FY



Note:

Deductions that are recovered from payroll, proof documents are not required to be submitted & exemption will be given automatically like **Mediclaim deduction, Parents Mediclaim deduction etc.**

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

Figure 43: Medical Insurance Premium (Sec 80D)

1. Employee fills all the relevant and mandatory details in the form.
2. Employee clicks the **Save** button to save the details successfully or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Medical Insurance Premium for parents (sec 80D)** form.

Employee fills Medical Insurance Premium for parents (sec 80D) details in form.

Figure 44: Employee fills Medical Insurance Premium for parents (sec 80D) details

1. Employee fills all the relevant and mandatory details in the form.
2. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Medical Insurance Premium paid for senior Citizen (Parents)** form.

Employee fills Medical Insurance Premium paid for senior Citizen (Parents) details in form.

The screenshot shows the ASCENT HR software interface. On the left is a dark blue sidebar menu with various options like Dashboard, My Home, Performance Management, Time & attendance, Career centre, Organization chart, Payroll and Tax, Accept letters, Travel & expenses, Payroll Helpdesk, Performance Improvement Plan, Confirmation, Tax & Reimbursement, Submit tax proof, Downloads, and Asset Management. The main window title is 'Investment Proof Submission'. It has tabs for Personal details, HRA, Housing loan, Other Income (Bank Interest, etc.), Ded. Under Sec 80C to 80CCD, and Ded. Under Chapter VI A. The current tab is 'Personal details'. A sub-section titled 'Medical Insurance Premium paid for senior Citizen (Parents)' is selected. Below it, there's a table with columns for Declared, Proof Submitted, Approved, and Remarks. The 'Declared' row shows values 0.00, 0.00, 0.00, and Remarks. To the right of the table is a note section with a 'Note' heading and four points. At the bottom of the form are 'Save' and 'Submit & Preview' buttons, with 'Submit & Preview' being highlighted with a yellow oval and a cursor icon pointing to it. The right side of the screen shows a sidebar with attachments (0 out of 2 uploaded, 2 are pending), document lists, and other document links.

Figure 45: Employee fills Medical Insurance Premium paid for senior Citizen (Parents)

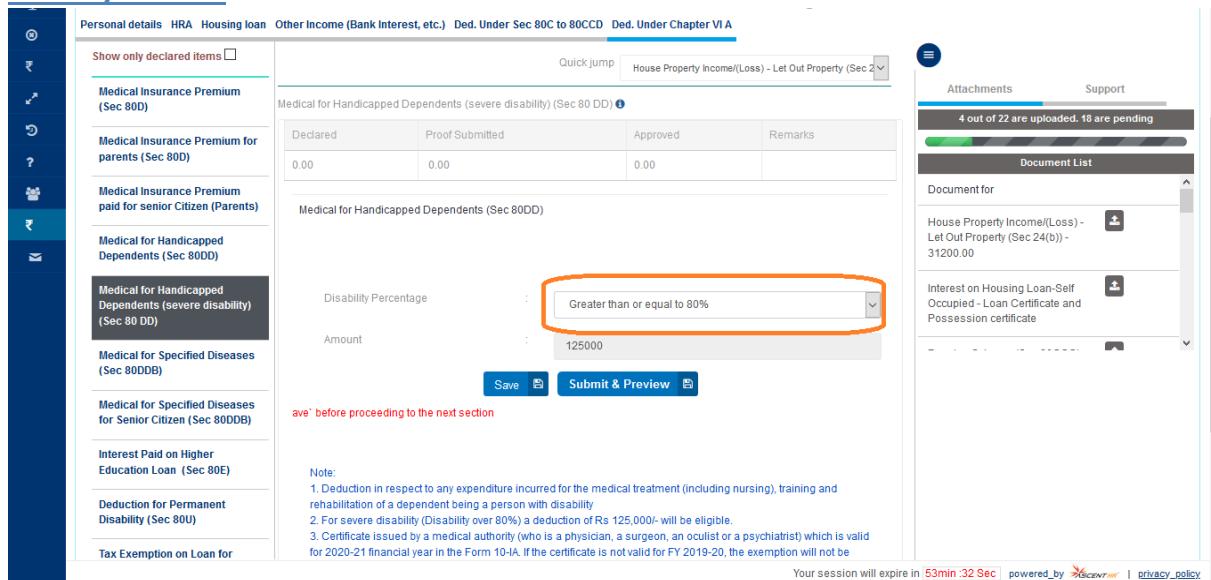
1. Employee fills all the relevant and mandatory details in the form.
2. Employee can add one more row by clicking on the **Add** icon to add another member details.
3. Employee can delete the row by clicking on the **Delete** icon.
4. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
5. Click the **Next** Button to navigate to **Medical Insurance Medical for Handicapped Dependents (Sec 80DD)** form.

Employee fills Medical for Handicapped Dependents (Sec 80DD) details in form.

Figure 46: Employee fills Medical for handicapped dependents details

1. Employee fills the Medical for handicapped Dependents (Sec 80DD) value in form.
2. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Medical Insurance Medical for Handicapped Dependents (severe disability) (Sec 80 DD)** form.

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



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 □ 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 (Sec 80DD)

Disability Percentage: Greater than or equal to 80% ⓘ

Amount: 125000

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 2020-21 financial year in the Form 10-IA. If the certificate is not valid for FY 2019-20, the exemption will not be

Your session will expire in 53min :32 Sec | powered_by ASCENT HR | privacy policy

Figure 47: Employee fills handicapped dependent (severe disabilities) details

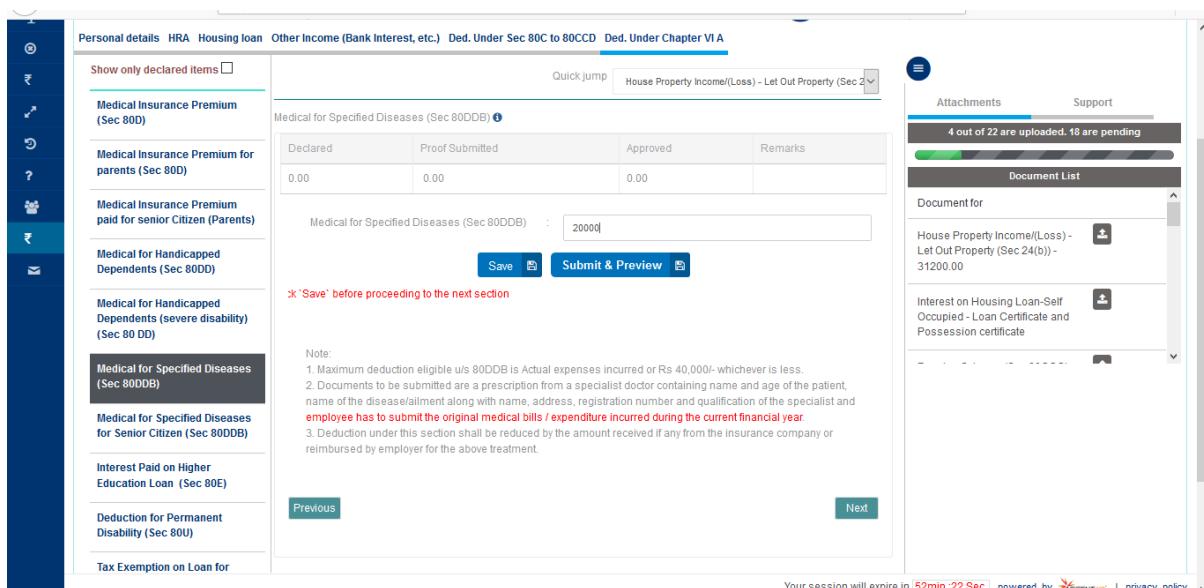
1. Employee fills the Medical for Handicapped Dependents (Severe disability) (Sec 80DD) value in the form.
2. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Medical for Specified Diseases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



Note:

- ✓ Employee cannot claim for both Medical for Handicapped Dependents (Sec 80DD) and Medical for Handicapped Dependents (severe disability) (Sec 80 DD).

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



Personal details 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)

Tax Exemption on Loan for

Medical for Specified Diseases (Sec 80DDB)

Declared Proof Submitted Approved Remarks

Save Submit & Preview

* "Save" before proceeding to the next section

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.

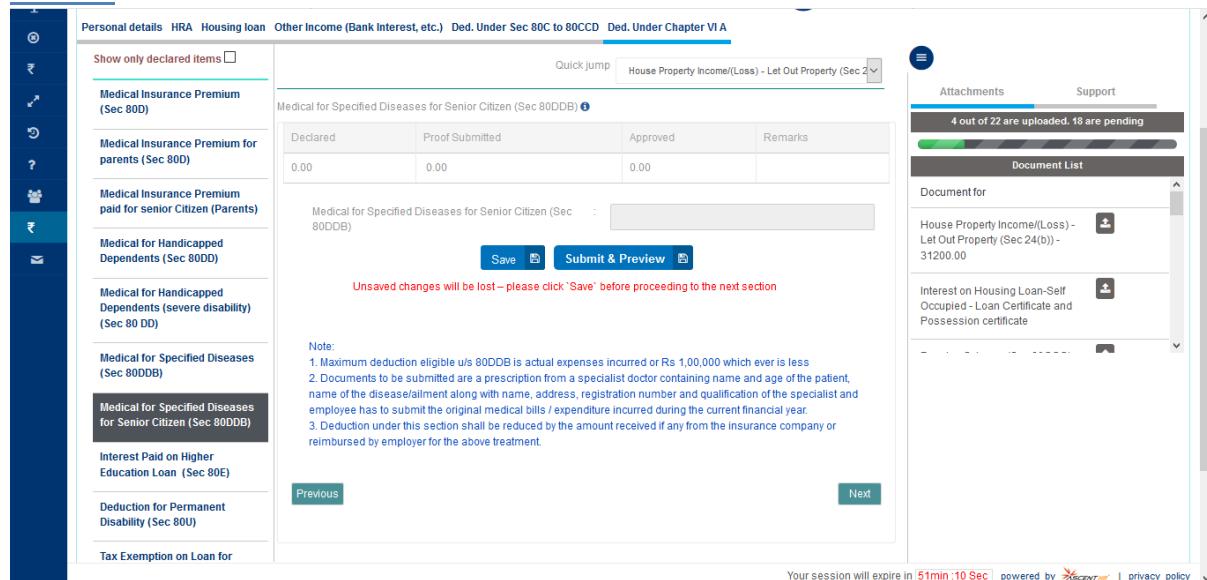
Previous Next

Your session will expire in 52min:22 Sec | powered_by | [privacy policy](#)

Figure 48: Employee fills Medical for specified diseases details

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

Employee fills Medical for Specified Diseases for Senior Citizen (Sec 80DDB) details



Personal details 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 80D)

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)

Tax Exemption on Loan for

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

Medical for Specified Diseases for Senior Citizen (Sec 80DDB) [?](#)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical for Specified Diseases for Senior Citizen (Sec 80DDB) [?](#)

Save [Submit & Preview](#)

Unused changes will be lost - please click 'Save' before proceeding to the next section

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.

Previous [Next](#)

Your session will expire in **51min:10 Sec** powered_by  | [privacy_policy](#)

Figure 49: Employee fills Medical for specified Diseases for senior citizen details

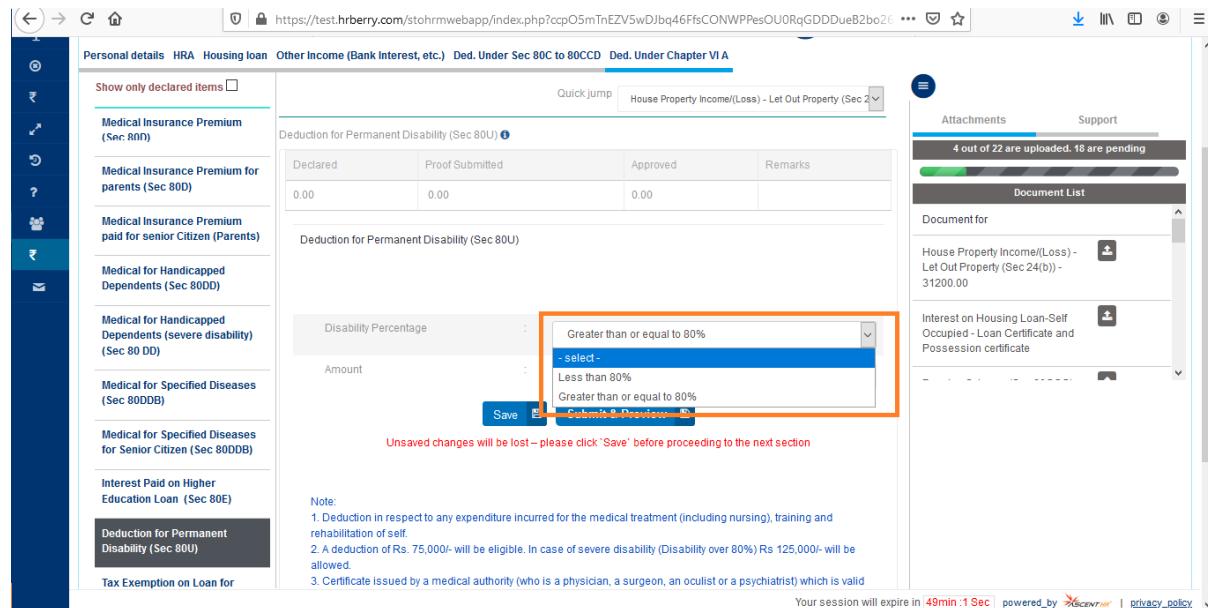
1. Employee fills the Medical for Specified Diseases for Senior Citizen (Sec 80DDB) value in the form.
2. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **Interest Paid on Higher Education Loan (Sec 80E)** form.

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

Figure 50: Employee fills the Interest paid on higher education loan details

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

Employee fills Deduction for Permanent Disability (Sec 80U) details

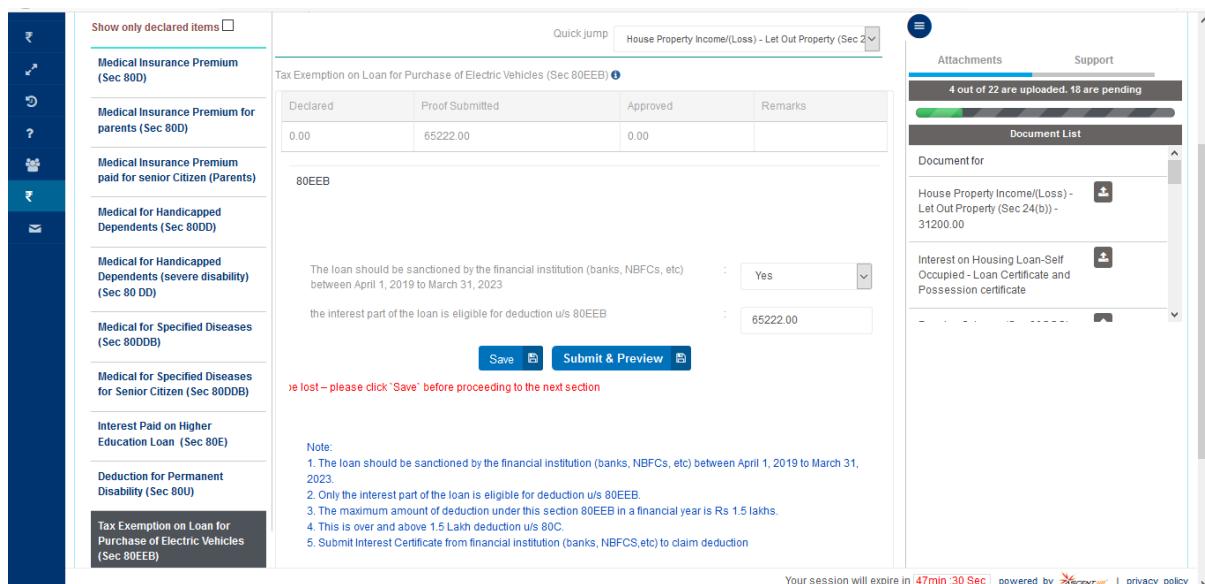


The screenshot shows the 'Ded. Under Sec 80C to 80CCD' tab selected in the top navigation bar. On the left sidebar, under 'Medical Insurance Premium (Sec 80D)', the 'Deduction for Permanent Disability (Sec 80U)' option is highlighted. The main form area displays the 'Deduction for Permanent Disability (Sec 80U)' table with one row: Declared (0.00), Proof Submitted (0.00), Approved (0.00), and Remarks (empty). Below the table is a section for 'Disability Percentage' with a dropdown menu. The 'Greater than or equal to 80%' option is selected and highlighted with a red box. A note at the bottom of the form states: 'Unsaved changes will be lost – please click 'Save' before proceeding to the next section'.

Figure 51: Employee fills Deduction for permanent Disability details

1. Employee fills the Deduction for Permanent Disability (Sec 80U) value in the form.
2. Employee clicks the **Save** button to save the details or click **submit and preview** button to submit the details.
3. Click the **Next** Button to navigate to **80EEB** form.

Employee fills 80EEB form



The screenshot shows the 'House Property Income/(Loss) - Let Out Property (Sec 24(b))' section of the EPSF. On the left, a sidebar lists deduction categories: 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), and Tax Exemption on Loan for Purchase of Electric Vehicles (Sec 80EEB). The main area displays the 'Tax Exemption on Loan for Purchase of Electric Vehicles (Sec 80EEB)' table with one row: Declared 0.00, Proof Submitted 65222.00, Approved 0.00, Remarks. Below the table, notes state: 'The loan should be sanctioned by the financial institution (banks, NBFCs, etc) between April 1, 2019 to March 31, 2023', 'the interest part of the loan is eligible for deduction u/s 80EEB', and 'Interest Certificate from financial institution (banks, NBFCs, etc) to claim deduction'. Buttons for 'Save' and 'Submit & Preview' are present. A note at the bottom says 'You are about to leave this page. Any unsaved changes will be lost - please click 'Save' before proceeding to the next section.' The right side features a sidebar with 'Attachments' (4 out of 22 uploaded, 18 pending), 'Support' (Document List: House Property Income/(Loss) - Let Out Property (Sec 24(b)) - 31200.00, Interest on Housing Loan-Self Occupied - Loan Certificate and Possession certificate), and session information ('Your session will expire in 47min:30 Sec').

Figure 52: Employee fills 80EEB form

1. Employee fills the form.
2. Employee clicks the **Save** button to save the details or click **Submit and preview** button to submit the details.

Employee views the Investment Proof Submission pages

The screenshot shows the 'Investment Proof Submission' page with several sections:

- GENERAL GUIDELINES:** Includes instructions for updating Tax Savings Details, entering data accurately, keeping investment proofs available, and using specific declaration formats.
- Proof submission status:** A progress bar showing steps: Proof Submission (1), Upload form 12BB (2), Validation (3), and Approval (4). Below it, a box says "Pending for FORM12BB upload and Final Submission".
- Declaration Vs proof submission:** A bar chart comparing declared, submitted, and variance values. The chart shows 0 for Declared, 1592842 for Submitted, and 1592842 for Variance.
- Approval status:** A bar chart showing values for Submitted (1592842), Approved (0), and Variance (-1592842).
- My investments:** A pie chart showing investment distribution across categories: Previous employment: 0%, HRA: 40000, Housing loan: 311900, Ded. Under Sec 80C to 80CCC 550500, Ded. Under Chapter VI, and A150942.

Two buttons are highlighted with orange circles: **Modify** (top right) and **Modify** (bottom center).

Figure 53: Employee views the Investment Proof Submission page

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

Re-Submission of Proofs

Employee Uploads the Document

Once the approval procedure for proofs submitted is completed, employee will be provided an option to re-submit the rejected proofs (if any) within the period of 3 days.

Below is the procedure to follow while initiating re-submission process

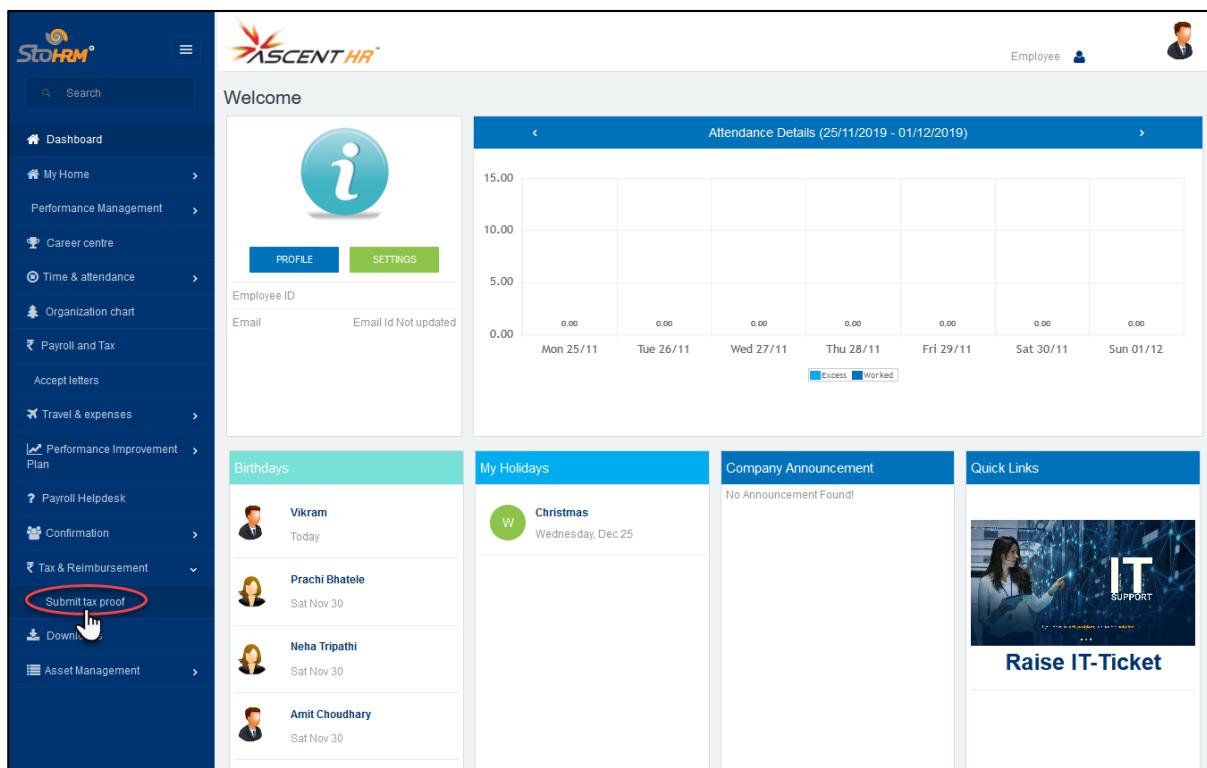


Figure 54: Employee clicks Submit tax proof link

- Once employee clicks **Submit Tax Proof** link, will be navigated to below page.

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.

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.

Proof submission status

Proof Submission Upload form 12BB Validation Approval

Proof Submitted Approved

Declaration Vs proof submission

Declared	Submitted	Variance
0	100008	100008

Approval status

100008		
--------	--	--

My investments

Figure 55: Employee clicks Re-Submit button

- Employee clicks “Re-submit” button to proceed further with re submission procedure.

Upload documents for Re-Submission Re-Submit

Note :

- Upload all supporting proofs under 'Upload File' - Please select the appropriate File Type in dropdown box and upload the document.
- Please provide the "password" under 'File Password' tab if the document which you are attaching is Password protected.
- The pending documents for upload will be displayed under "Supporting documents to be uploaded".
- You can view the list of documents uploaded under "Uploaded document List".
- Once all supporting documents are uploaded, please take a print out of "Form 12BB" (available under 'Download Form 12BB') and upload the signed scan copy under 'Upload File'. (The Form 12BB is auto filled document, you just need to sign and upload the document and this is a mandatory document).
- After completion of upload of all supporting documents - please check your investments details under "Preview and Submit" tab before Final Submission "I Agree and Submit".

Upload File

File Type: HRA (Rent paid) Documents

Document Amount:

Select File: No file selected

File Password:

Download FORM 12BB :

Please click here to download form 12BB : [Download](#)

Supporting documents to be uploaded :

HRA (Rent paid) Documents
Form 12BB

Figure 56: Employee uploads the document

- Once employee clicks on Re submit button, employee will be directed to above shown page where the below mentioned details are required.
 - Employee has to update the **Document Amount** in case of any change in amount.
 - Employee clicks the **Browse** button to upload the document.
 - Provide the password for the file, if it is password protected and click the **Save** button.

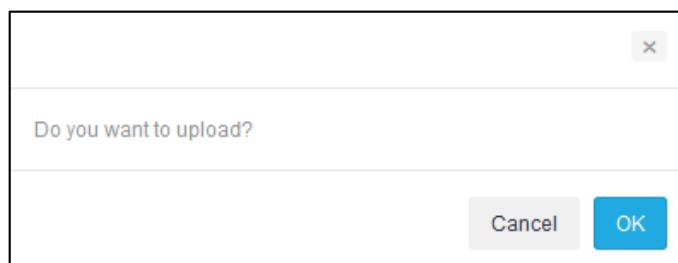


Figure 57: Click Ok to proceed

- Once employee save the details submitted, the above shown confirmation dialog box appears where employee has to click **OK** to save the document successfully.

Document for	Password	Download	Amount	Delete
HRA (Rent paid) Documents			50000.00	

Figure 58: Employee views the document list

- Once the details are successfully updated along with supporting document, the details will be shown as displayed in above screenshot.
- Employee can cross verify the details and proceed for Final submission.

Employee clicks Re-submit tab

Note:

- Upload all supporting proofs under 'Upload File' - Please select the appropriate File Type in dropdown box and upload the document.
- Please provide the "password" under 'File Password' tab if the document which you are attaching is Password protected.
- The pending documents for upload will be displayed under "Supporting documents to be uploaded".
- You can view the list of documents uploaded under "Uploaded document List".
- Once all supporting documents are uploaded, please take a print out of "Form 12BB" (available under 'Download Form 12BB') and upload the signed scan copy under 'Upload File'. (The Form 12BB is auto filled document, you just need to sign and upload the document and this is a mandatory document).
- After completion of upload of all supporting documents - please check your investments details under 'Preview and Submit' tab before Final Submission "I Agree and Submit".

Figure 59: Employee clicks Re-Submit tab



User Guide for EPSF (Employee) – Standard Document

- Once Employee is done with the upload, he/she need to click on **Re-submit** tab as shown in above screenshot in order to proceed with final submission.

Component	Submitted	Approved	Reasons for Rejection
House Rent Receipt Submission (HRA)			
Rent Paid Apr-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid May-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Jun-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Jul-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Aug-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Sep-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Oct-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Nov-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Dec-18	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Jan-19	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Feb-19	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Mar-19	8334.00	0.00	Kindly Sumit the rent receipts

Figure 60: Employee views the Component list

- Once employee clicks on Re-submit, he/she will be able to see the details, which were submitted as shown above.

Rent Paid Jan-19	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Feb-19	8334.00	0.00	Kindly Sumit the rent receipts
Rent Paid Mar-19	8334.00	0.00	Kindly Sumit the rent receipts

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.

Please Note:
No alteration or modification allowed in EPSF (Investment Proofs) tool once you submit the "Submit Tax Proof" button.

Submit Tax Proof

Figure 61: Employee clicks Submit Tax proof button

- Once employee has verified all the details, which were submitted, he/she can go ahead and click on **“Submit Tax Proof”** button.

Note:



✓ **No alteration/modifications can be made, once you are done with final submission.**