Sample Work – 1

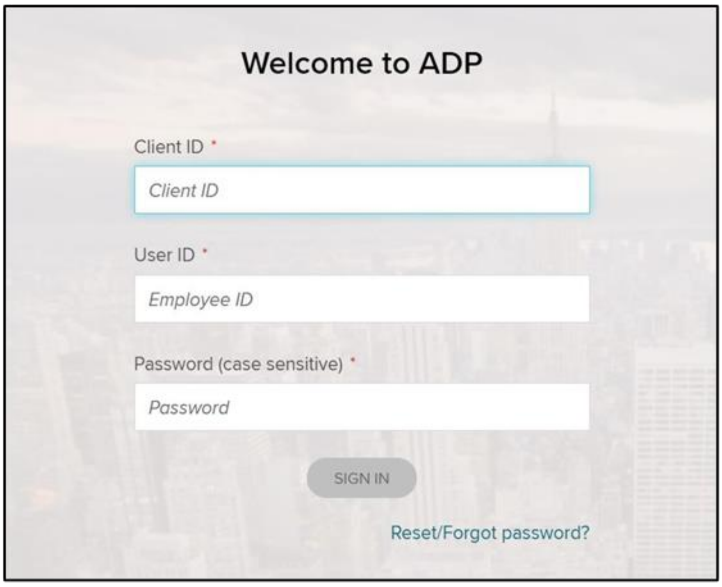
ADP Payroll Tool User Guide for Employees

Contents

1. Login

Login in to the ESS portal by using the credentials provided to you by your administrator:

1. In the browser window, type the URL https://www.ess.adp.in/ESS4
2. Enter **Client ID**, **Employee ID** and **Password** on the login portal.
3. Click **Sign In**.



2. Reset/Forgot Password

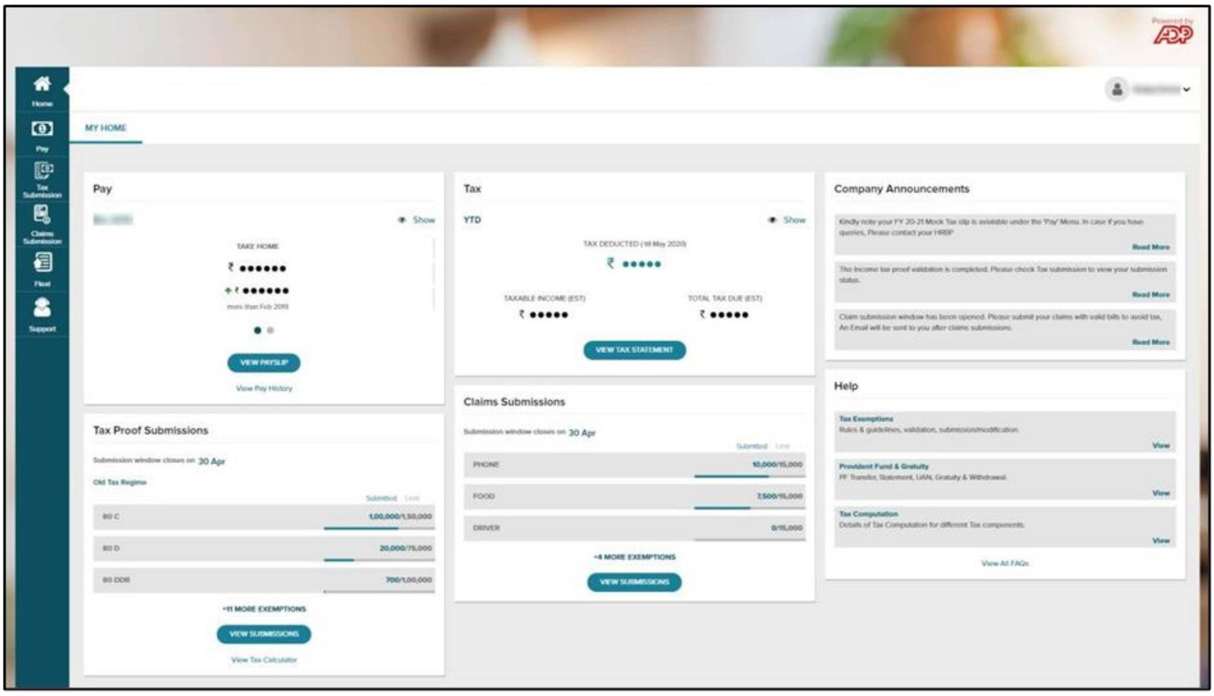
In case you forget your password or you wish to reset the password, click the **Reset/Forgot Password?** link on the login window. The system will prompt you to submit your client ID, employee ID, and registered Email id. This will trigger an email containing the OTP to reset your password. Use the OTP to reset your password and login to the ESS application (The process is applicable for first time users as well).

3. Homepage View

On the left pane, click **Home** to view the homepage. It displays a snapshot view of your **Pay, Tax, Tax Proof** and **Claim Submission** details. It also has the **Help** tile which guides users with commonly asked questions (FAQs) related to tax, investment proofs, and reimbursement guidelines.

The **Company Announcement** tile provides with an overview of all announcements made by your organization.

In the upper-right corner of the header section, you can view your employee ID, Date of joining and PAN details. You can also change your profile info and password, and logout from the application.



3.1 Pay

In this tile, you can view your monthly take home salary. You can choose to view the details on the tile or hide it by clicking the eye icon called **Show**.

- Click **View Payslip** to see the latest salary slip.
- On clicking **View Pay History**, you can view detailed pay information including pay trend, compare pay slips across three pay periods, and view and download pay slips. Click here for more details.

3.2 Tax

In this tile, you can view the tax deducted amount on the latest salary. You can choose to view the details on the tile or hide it by clicking the eye icon called **Show**. On clicking **View Tax Statement** you can view:

- Latest month tax values, YTD values and tax estimates for the current year and each quarter.
- Use the Tax Planner download option to generate the report for the entire year. Click here for more details.

3.3 Tax Proof Submissions

In this tile, you can view your tax submission window timeline.

- Based on the tax regime selected by an individual (Old/New) they can view the entire exemption list along with the exemption limit and the amount for which the submission has been made.
- On clicking **View Tax Submission** you will be redirected to tax submission page. Click here to go the Tax Submission section.
- On clicking **View Tax Calculator** you will be redirected to the tax calculator page. Click here to go the Tax Calculator section.

3.4 Claim Submission

Here you can view your claim submission window timeline.

- All the claims selected by an individual can be viewed along with the list of claims and the amount for which proofs has been submitted.

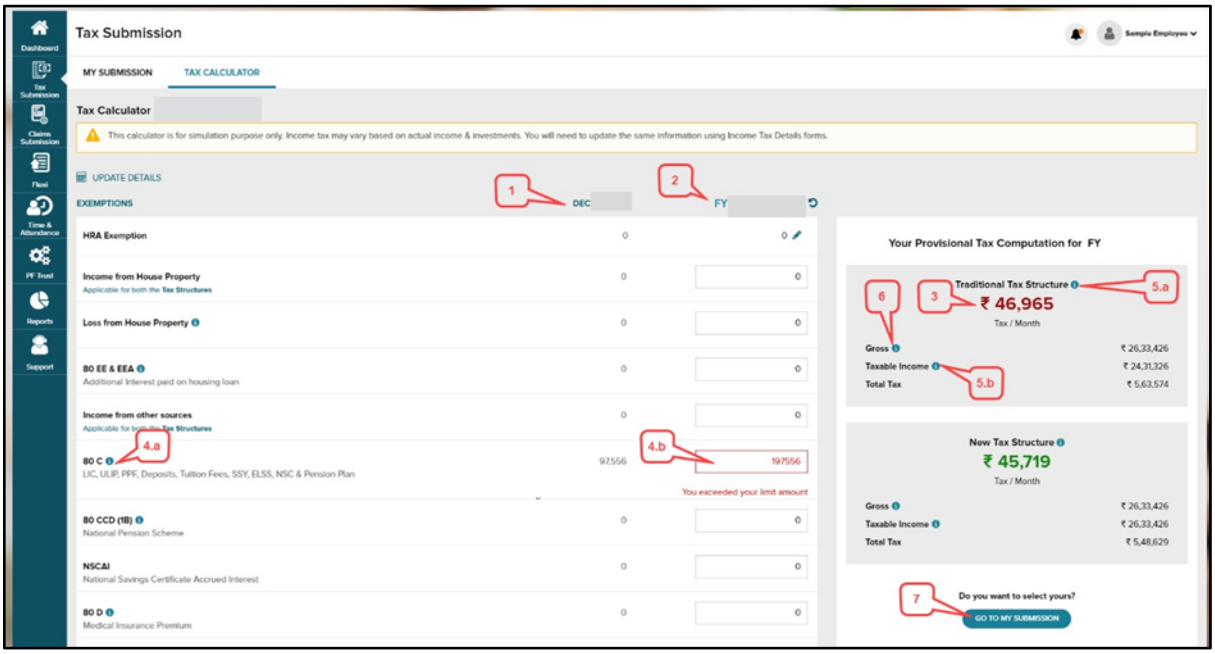
- On clicking **View Claim Submission** you will be redirected to claim submission page. Click here to go the Claim Submission section.

4. Tax Submission

In the Tax Submission section, you can calculate your taxes in the **Tax Calculator** tab, and view your submission details under the **My Submission** tab.

4.1 Tax Calculator

This section enables you to calculate your taxes as per new or old regime based on your inputs. In the below snapshot, each section is marked and the same is being explained in the following points:

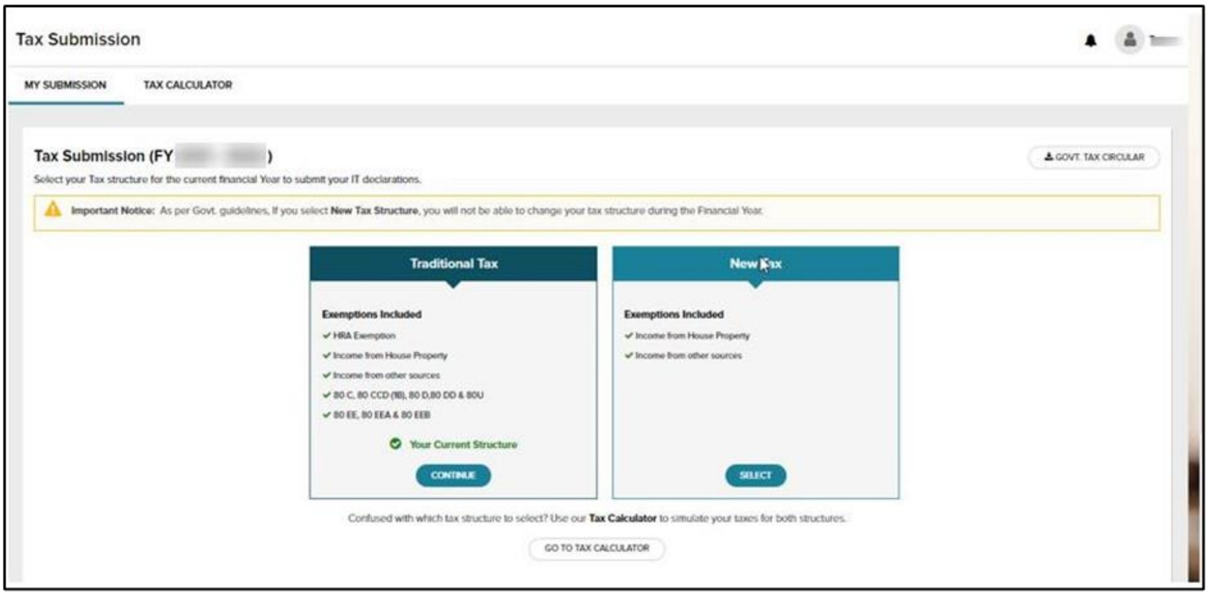


1. This column shows you the last year's exemptions and the same is pre-populated under current year. For the new joiners, last year values will not be available.
2. Please enter your current investment details under current year to check the monthly tax under both the tax structures. The values reflecting under current year can be edited as per your current investments.
3. Based on the values entered under the current financial year, your monthly tax will be reflected on the right-hand side under both the tax structures.
4. By clicking
    a. The information (i) icon against each exemption components you can view the limits under each section.
    b. If the value entered exceeds the limit the same will be highlighted in red.
5. By clicking
    a. The information (i) icon against both the tax structure gives you the tax slab details
    b. The information (i) icon against Taxable Income shows the computation of taxable income.
6. By clicking on the information (i) icon next to **Gross** you will be redirected to the tax information page where you can verify your last gross income.
7. Once you decide which tax regime suits best for you, click the **Go To My Submission** link to select your tax structure.

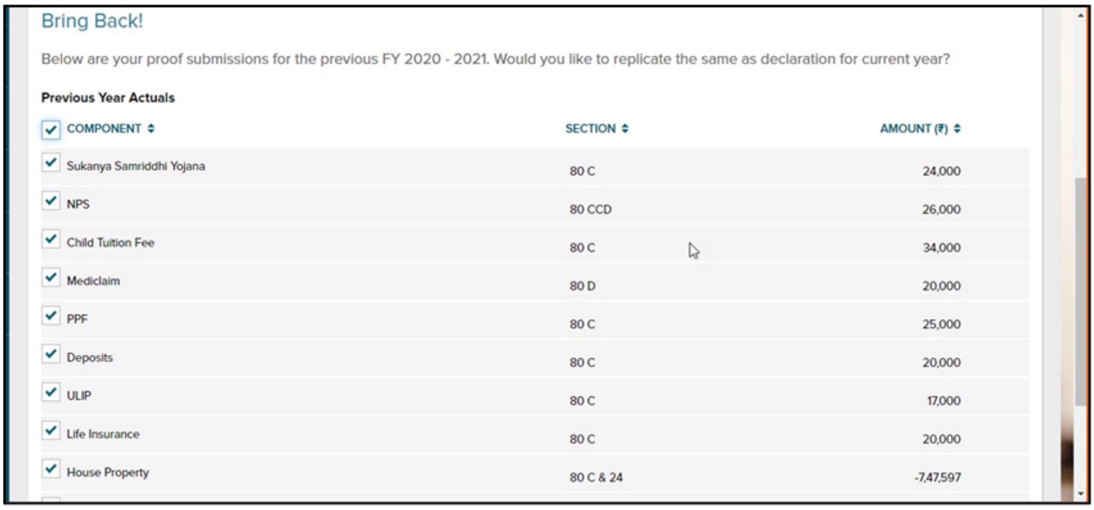
4.2 Tax Submission

On this page you can now select your tax structure and submit your IT declarations and proofs for the current year. Choose your tax structure by clicking on the Continue or Select button. Once the tax structure is selected, the same cannot be changed further.

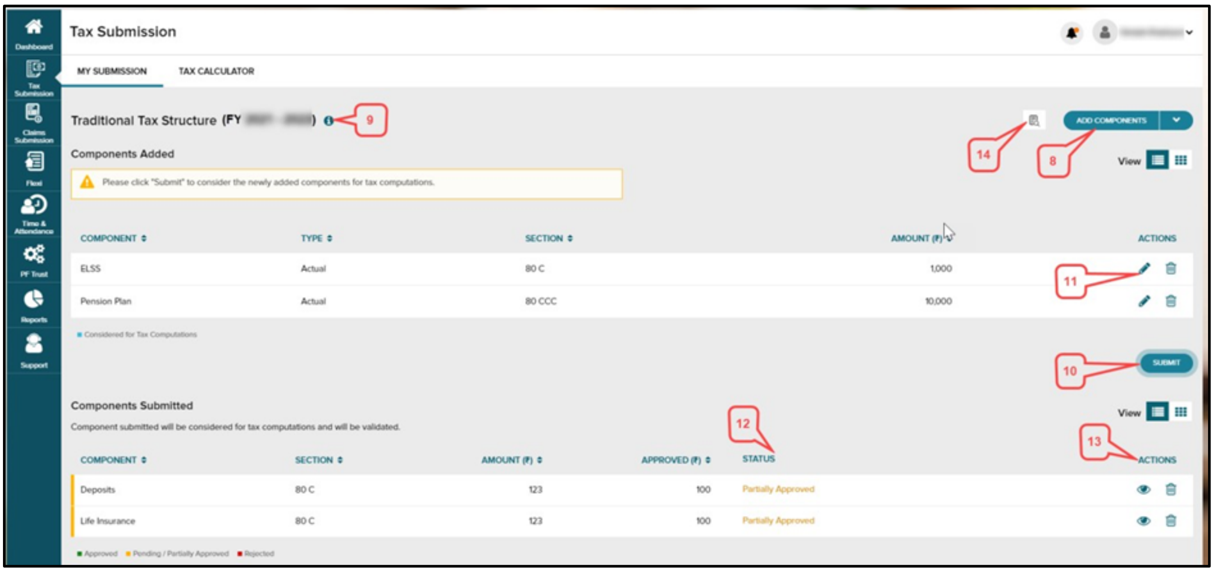
For a new joiner you have an option to add components and you can add the same as per your investments, whereas for the existing employees, the last financial year (FY) details will be auto populated as per the proofs approved. To explore more on how taxes are calculated you can click the **Go To Tax Calculator** button.



On selecting the Tax structure, you will be redirected to the below page. For the existing employees, the last FY details will be auto populated as per the proofs approved, you can carry forward the same as declaration for current FY.



Click on Yes or No to proceed further for submission screen. In the below snapshot, each section is marked and the same is being explained in the following points:



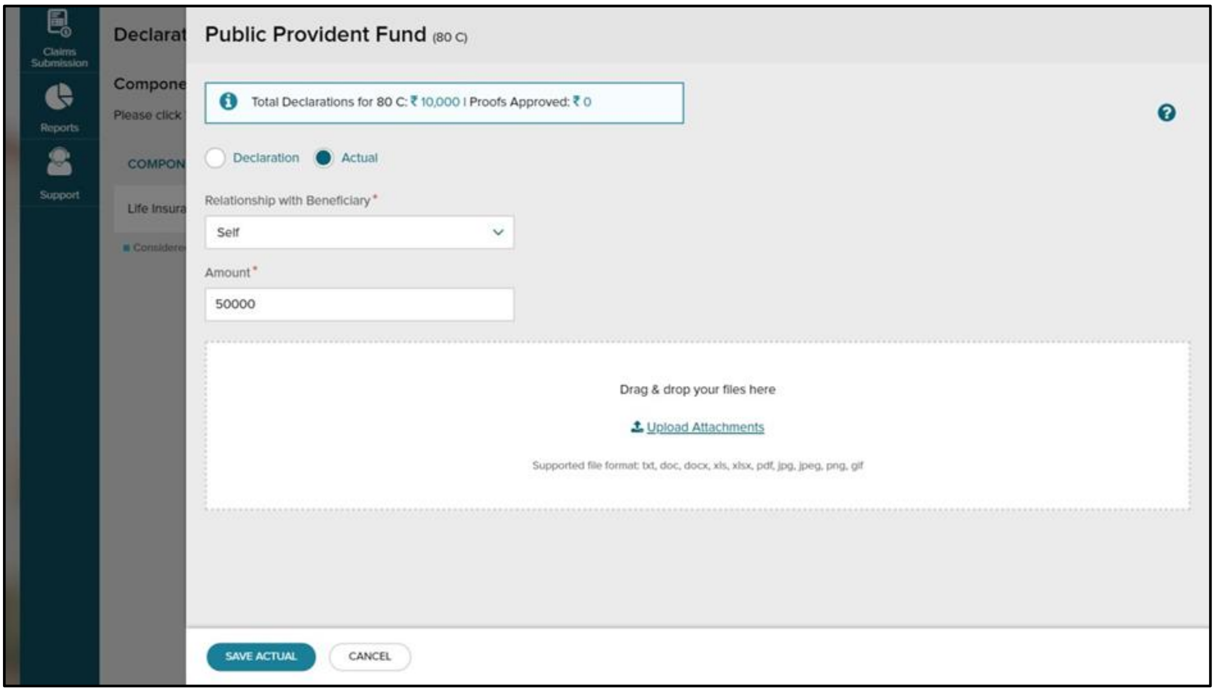
8. Click **Add Components** to add entries and submit your declared values against each of the added components.
9. Review the submission window including validation and submission dates by clicking the information (i) icon.
10. Click **Submit** to submit the added components. This action ensures that all your entries are considered for tax exemption. You will receive a notification through email on successful submission of your entries.
11. Use the edit mode to convert the declarations to actual and submit the actual investment values along with the required proof documents.
12. The approval status of your submissions can be monitored using the **Status** column.
13. Further, to view the validation remarks or delete an entry, click the preview or the delete icon under the **Actions** column.
14. To view all entries submitted under income tax, download the Consolidated View Report by clicking the Download Reports icon.

Sample Submission Screen (e.g.: Public Provident Fund)

For each of the chosen component, you need to provide certain details before submission. You will see a total value of declaration and actual proof submitted for a given income tax section.

When submitting a component:

- Choose whether your declared information is for declaration purpose or actual investment by selecting either **Declaration** or **Actual** radio-button. If you select **Declaration**, the information will be saved which can be edited later. Select **Actual** before submitting information. (The options may not be available after a certain date which is subjected to your company configuration).
- Remember to provide the password in the event of the attached document being password protected by clicking the key icon. (The icon will be displayed when you upload an attachment).
- You can view the submission guidelines by clicking the Points to Consider (?) icon.

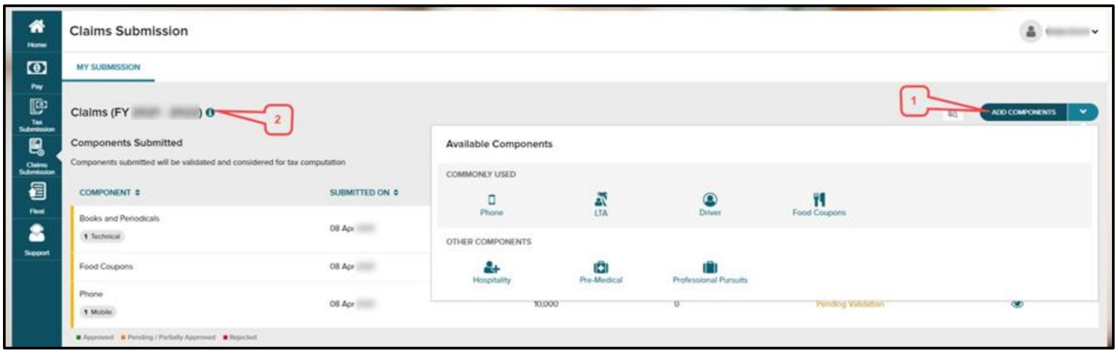


Note: For each of the chosen component, you need to provide certain details. You can check the eligible submission proofs under submission guidelines. The details and eligibility rules vary and depend on the component you have chosen. For example, for Public Provident Fund, you need to provide relationship details of the beneficiary and the tax-exempt amount.

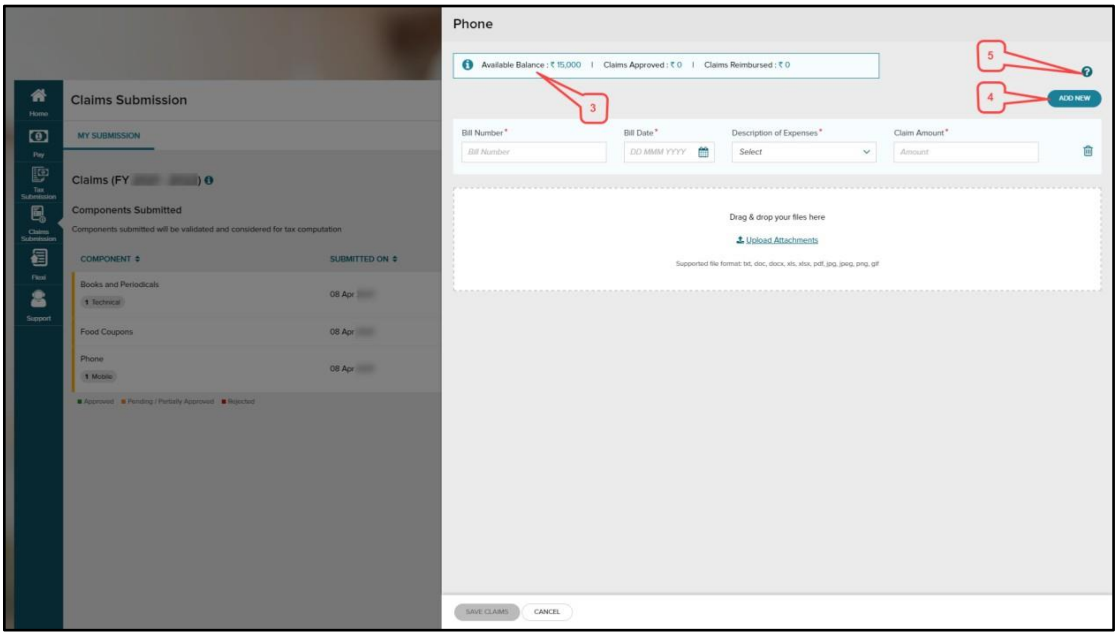
5. Claims Submission

This page serves as the summary of all information for claims. On this page, you can:

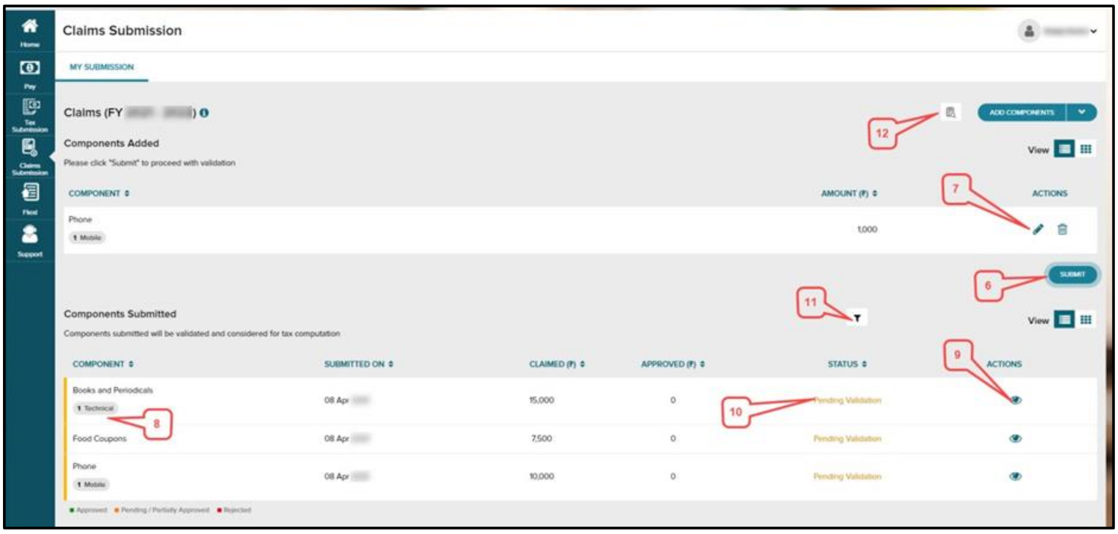
1. Click **Add Components** to add entries and submit your claims against each of the added components.
2. Review the submission window including validation end dates as well the query period by clicking the information (i) icon.



3. Each claim component will reflect **Available Balance** based on eligibility, Approved claim amount and **Claims Reimbursed** (Paid amount).
4. While adding a new claim, you can add multiple claim items.
5. You can view the submission guidelines by clicking the Points to Consider (?) icon

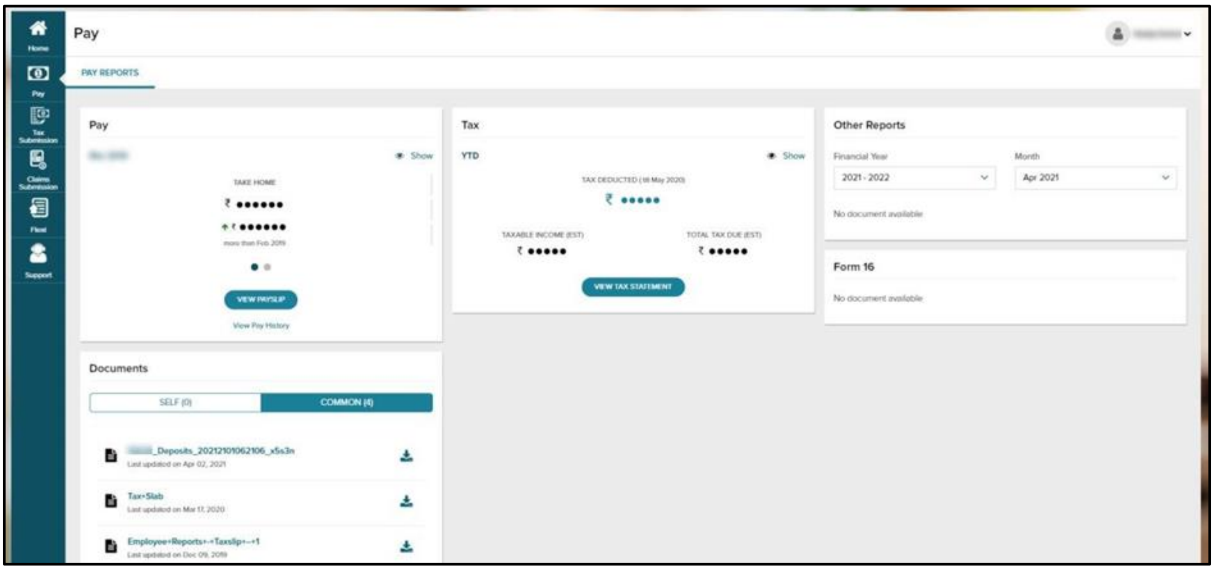


6. Click **Submit** to submit the components. This action ensures that all your entries are considered for tax exemption. You will receive an email notification on successful submission of your entries.
7. Use the edit mode to modify the claim details at any time before submission.
8. When multiple entries are added in a given claim, aggregate number under each category is displayed. Example: If a fuel claim has multiple entries for fuel, maintenance, toll then three pills are reflected in summary page each containing total number of entries in the respective categories
9. On completion of validations, you can view the validation remarks by clicking the preview icon under the **Actions** column.
10. The approval status of a submission can be monitored using the **Status** column.
11. Use the filter to view entries submitted based on submission window or claim type. By default, the filter is set to the current submission window.
12. To view all entries submitted under claims, download the Consolidated View Report by clicking the Download Reports icon.



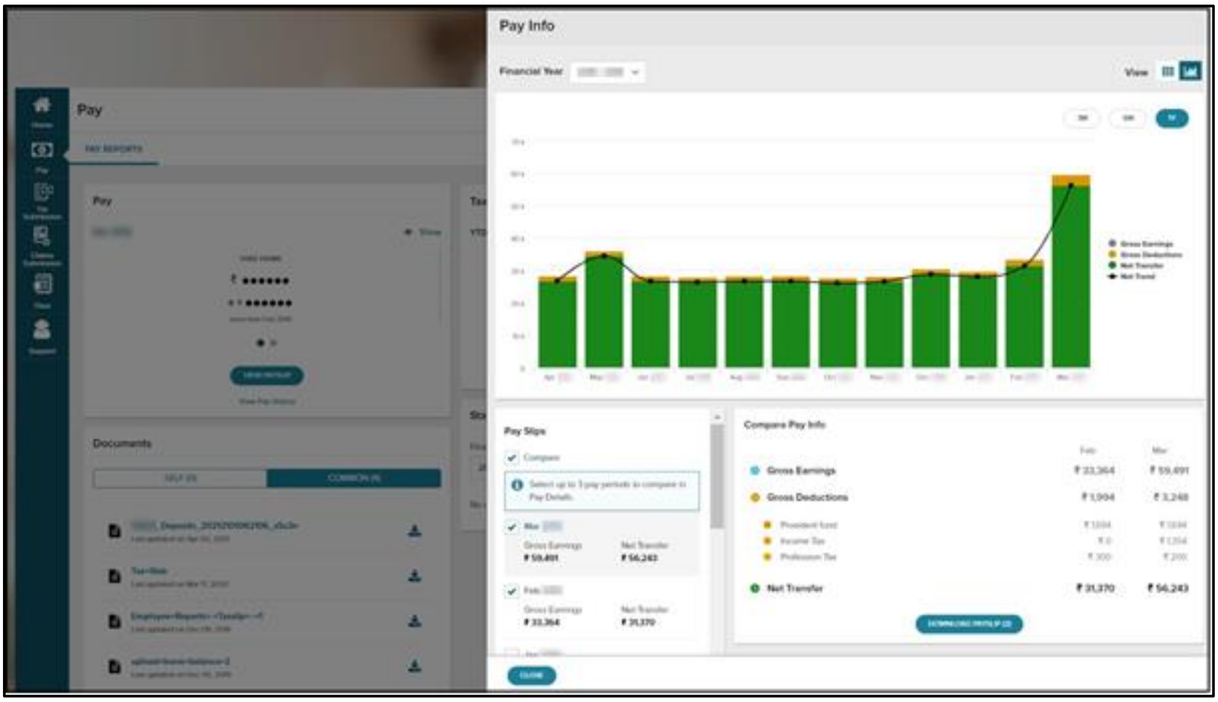
6. Pay Reports

The pay reports page displays a snapshot view of your pay and tax information, Form 16, other reports, and documents as applicable to your organization.



6.1 Pay Info

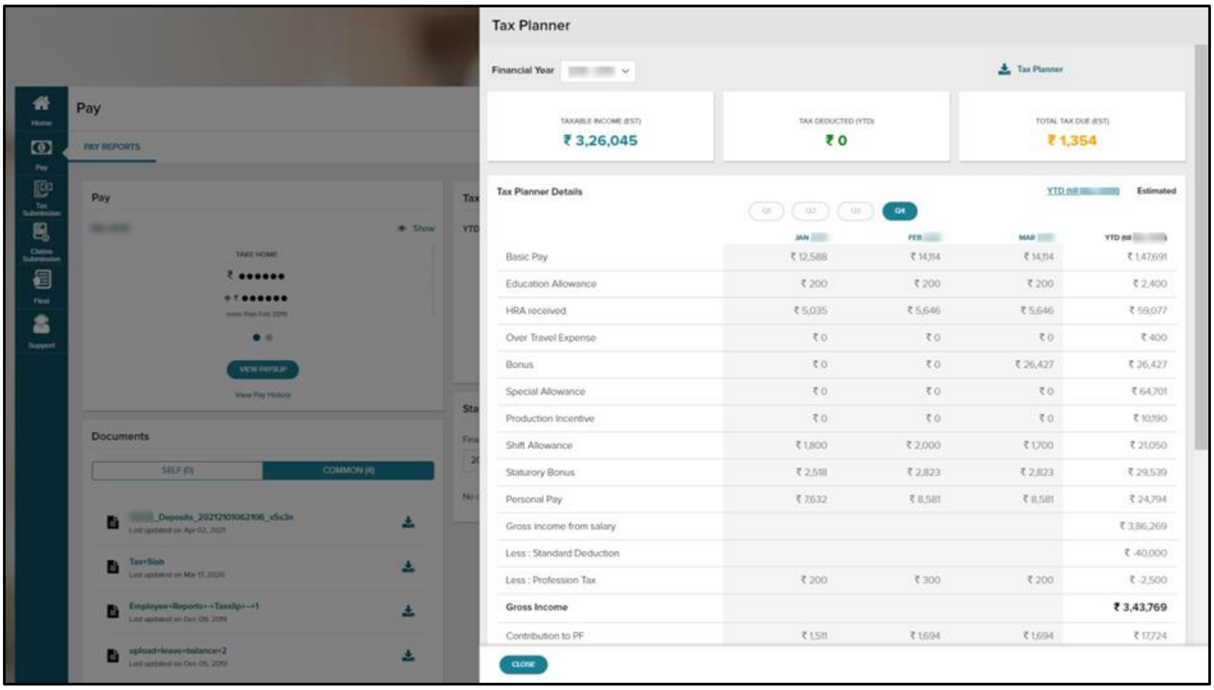
On clicking **View Pay History** on the **Pay Reports** page, you can view detailed pay information including pay trend, the ability to compare pay slips across three pay periods and view and download pay slips.



6.2 Tax Planner

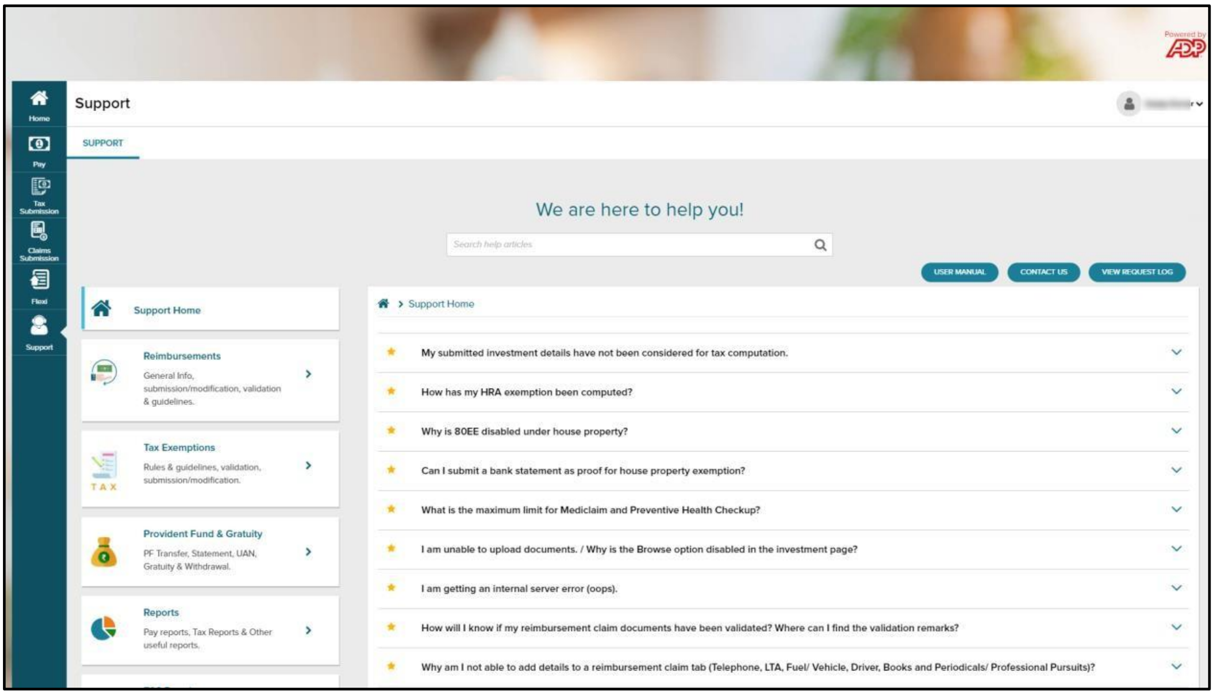
On clicking **View Tax Planner** on the **Pay Reports** page, you can view:

- Latest month tax values, YTD values and tax estimates for the current year and each quarter.
- Use the Tax Planner download option to generate the report for the entire year.



7. Support

To find answers to commonly raised queries go to the **Support** section. Look for your query in the FAQs listed under each category or use the search option provided.



If your question is unanswered, you can submit a query. All open support tickets can be viewed by clicking **View Request Log**.