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A. Quick View Table on Tax Proofs

Sl#	Exemption/ Section	Rules/ Guidelines		Proofs Required
1	HRA [Section-13(a)]	HRA Exemption Rules - Least of the below is exempted <ul style="list-style-type: none"> Rule 1- Actual HRA part of Comp Structure Rule 2- 50% of basic if Metro City (Mumbai, Delhi, Kolkata & Chennai) / 40% of basic in case of non-metro cities Rule 3- Actual rent paid / less 10% of the basic salary 		Mandatory <ul style="list-style-type: none"> Monthly rent receipt. Owner's PAN to be mentioned, and if rent > ₹ 8,333 per month Owner's PAN copy to be attached. HRA should be part of compensation plan
2	Investments Section- 80C Maximum Exemption allowed is ₹1,50,000 p.a.	Type of Investment <ol style="list-style-type: none"> PF /VPF LIC Mutual Funds PPF Tuition Fees Fixed Deposit NSC ULIP Housing loan principal Sukanya Samriddhi 	In the Name of <p>Self</p> <p>Self/ Family*</p> <p>Self</p> <p>Self/ Family*</p> <p>Upto 2 children</p> <p>Self</p> <p>Self</p> <p>Self/Family*</p> <p>Self/Joint#</p> <p>Max-2 girl children</p> <p>*Family – Self, spouse & 2 children. #Joint -Spouse & parents</p>	Proofs required – Scanned copy <ol style="list-style-type: none"> Proofs not required as payroll deduction Premium receipt SIP / Lumpsum payment Receipt Passbook and payment details Tuition fee receipt Deposit receipt (Min 5 years tenure) NSC passbook/certificate contains deposit details Premium payment receipt Interest-principal break-up from bank for the current FY Passbook and payment details
3	Medical Insurance Section- 80D	<ul style="list-style-type: none"> Policy can be in the name of Self/Spouse/Children/Dependent Parents Premium receipt must contain Name, Relationship (Self/Children/Spouse/Parents) & age Premium paid through cash is not allowed Maximum deduction allowed is ₹25,000 p.a. for Self/Spouse/ Children Additional ₹25,000 p.a. (₹50,000 p.a. if age > 60 years) for parents. 		<ul style="list-style-type: none"> Copy of premium paid between April to December 2021 Declaration for January'22 to March'22 Premium paid (Future Declaration Form plus previous year paid premium receipts). Proof is not required for Premium deducted through payroll for Company Medical Insurance Scheme which will be automatically considered
4	Education Loan Section- 80E	<ul style="list-style-type: none"> Loan taken for Self, Spouse, Children and Legal Guardian of the student. Interest alone is eligible for the deduction. 		<ul style="list-style-type: none"> Principal & Interest break-up certificate from financial institution stating interest paid and payable for the period April 2021 to March 2022.

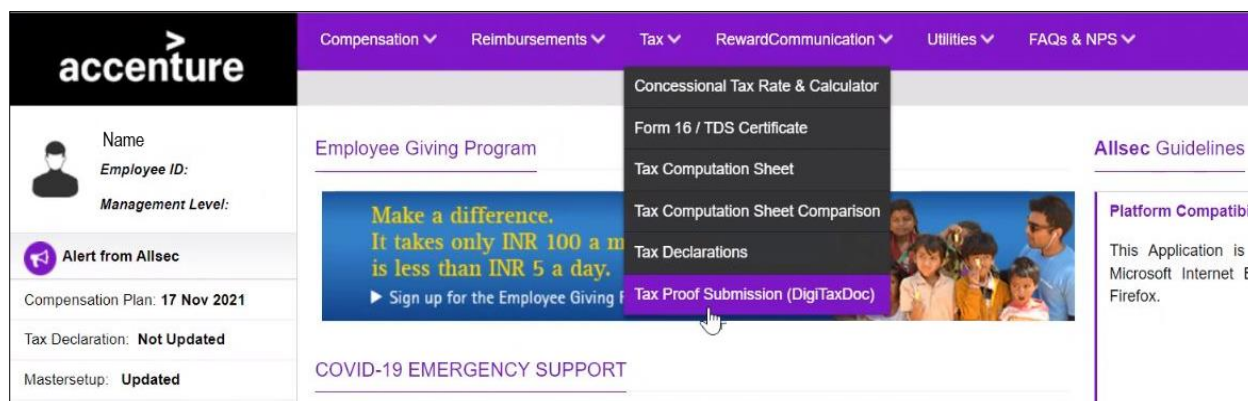
5	Home Loan Interest Section- 24B	<ul style="list-style-type: none"> Maximum Limit Rs.200,000 (Self-occupied / let-out) Must be receiving the Possession of the property by March 2022 Since cut-off date is earlier, need to arrange possession letter earlier. 	<ul style="list-style-type: none"> Provisional Certificate stating Break-up of Interest & Principal paid and Payable for the period April 2021 to March 2022 Possession Certificate from builder which should also states no dues, details of property etc. The proof states name of the employee with property address - latest electricity / water / maintenance / telephone landline / mobile bill / bank statement / property tax receipt
6	Home Loan Interest Section- 80EE	<ul style="list-style-type: none"> The loan is sanctioned by the financial institution during financial year i.e. April 1, 2016 to March 31, 2017 Loan sanctioned does not exceed ₹35 Lacs The property value does not exceed ₹50 Lacs As on the date of the sanction of loan, no other house property must be owned by the employee Additional home loan benefits up to ₹50,000 p.a. 	<ul style="list-style-type: none"> Provisional Certificate stating Break-up of Interest & Principal paid and Payable for the period April 2021 to March 2022 Any document that shows loan amount and property value Loan sanctioned letter from respective bank / financial institutions
7	Home Loan Interest for Affordable Property Section-80EEA	<ul style="list-style-type: none"> The loan is sanctioned by the financial institution during financial year i.e. April 1, 2019 to March 31, 2022. The value of the property does not exceed ₹45 Lacs Carpet area of the property should be as per norms As on the date of the sanction of loan, no other house property must be owned Additional home loan benefits up to ₹1,50,000/- p.a. 	<ul style="list-style-type: none"> Provisional Certificate stating Break-up of Interest & Principal paid and Payable for the period April 2021 to March 2022 Any document that shows loan value and carpet area Loan Sanctioned letter from respective bank / financial institutions
8	Disability for self Section- 80U	<ul style="list-style-type: none"> Allowed for Self only 40% / 80% disability Benefit ₹75,000 (40 to 79%) / ₹125,000 (80% and above) 	<ul style="list-style-type: none"> Form 10-IA signed & issued by Neurologist/Pediatric Neurologist/Civil Surgeon/Chief Medical Officer Amount is calculated based on the percentage of disability

9	Disabled Dependents Medical Exp Section- 80DD	<ul style="list-style-type: none">Dependents - Spouse/Children/Dependent Parents/Brother/Sister/Legal dependent40% / 80% disabilityBenefit ₹75,000 (40 to 79%) / ₹125,000 (80% and above)	<ul style="list-style-type: none">Form 10-IA signed & issued by Neurologist/Pediatric Neurologist/Civil Surgeon/Chief Medical OfficerBills for the expenditure for the current Financial Year
10	Electric Vehicle Interest Section- 80EEB	<ul style="list-style-type: none">Loan taken for purchase of an Electric Vehicle from any Financial Institution.The loan should have been approved on or after April 1, 2019.The Maximum eligibility is ₹150,000 p.a.Interest payable on such loan would qualify for deduction under this section	<ul style="list-style-type: none">Break-up of Principal & Interest certificate stating interest paid and payable from April 2021 till March 2022RC copy to be submitted along with bank loan certificate.Loan sanctioned letter from respective bank / financial institution

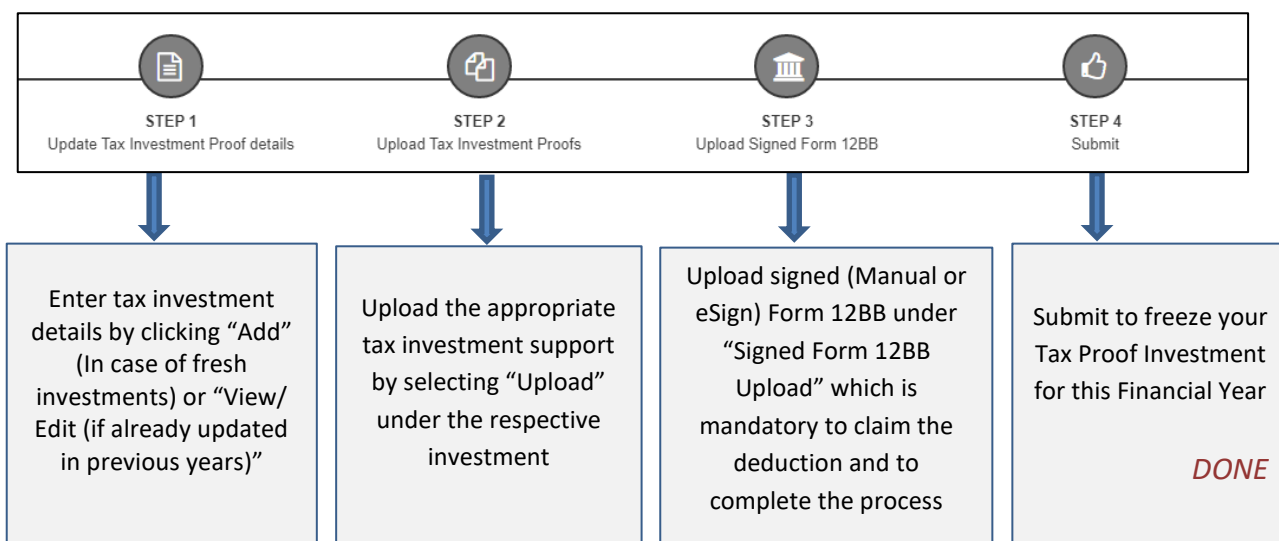
B. Online Tax Proof Submission (DigiTaxDoc) Module on Allsec login

1. Login to Allsec Allsec Smartpay

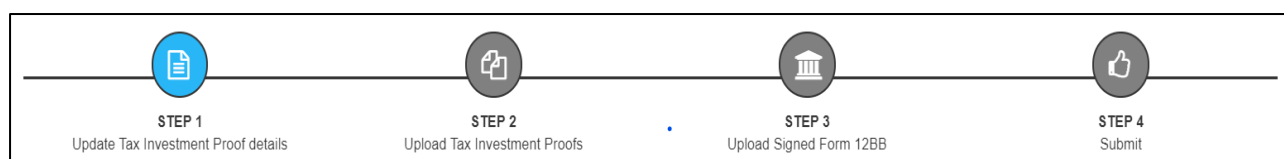
“Tax” Menu and then “Tax Proof Submission (DigiTaxDoc)”



2. MANDATORY STEPS



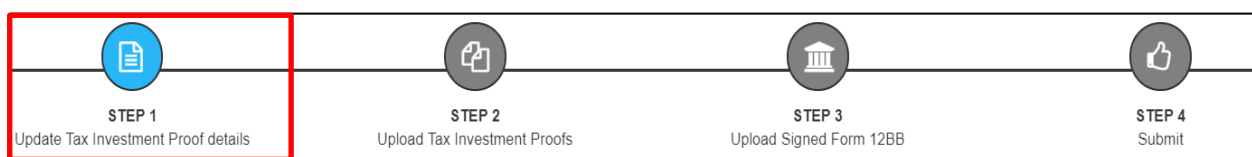
- Once employee completed each step color of the stages will be changes as below, to indicate the completion of the stages.



- On updating any of the investments as payable, future declaration form button will be displayed in Tax Index page as shown below. On clicking this button pre-filled future declaration form based on the investment details updated by employee will be available for download. Note for Rent payable for Jan to Mar to be updated in the rent details then only amount will reflect in this form.

***Employees can update and upload their January to March existing scheduled investments (excluding fresh investments) with the proofs of previous year along with the digitally signed future declaration form in case of yearly payment. Previous year Proof for Jan – March is not required for quarterly / half yearly since the payments are already made in the current financial year.**

2a. Step1 Process: Updation of Investment Proof Details



2a1. Default Screen:

- Rent field is shown by default for all employees whether employee declared or not.
- If declaration made during the year for other investments, the respective component would also appear (If employee declared LIP, the same will be displayed here).
- If proof details updated during previous year for the selected investments, the respective component will also appear (If employee updated proof details of LIP during previous years, the same will be displayed here.)
- PF and VPF contributed till Nov'21 and estimated projected value from Dec'21 to Mar'22 is displayed in "PF details" button.

STEP 1
Update Tax Investment Proof details

STEP 2
Upload Tax Investment Proofs

STEP 3
Upload Signed Form 12BB

STEP 4
Submit

Add New Tax Investment Component Click here to select new tax investment components

View Proof for Selected

Last modified on :

PF details

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Rent	Section 10(13A)	0.00	0.00	+		

PF details

Description	Amount
PF/VPF deposited during Apr-2021 to Nov-2021	
Estimated PF/VPF to be deposited during Dec-2021 to Mar-2022	
Estimated PF/VPF Contribution during Apr-2021 to Mar-2022	
Maximum Deduction allowed under section 80C of Income Tax Act 1961*	
Estimated tax investment proof to be submitted	

Important Notes :

- The details shown above are the estimated value and will increase / decrease.
- This details will be helpful to you to know your estimated Provident fund / voluntary provident fund contribution and the balance amount for which you may need to submit the tax investment proofs under section 80C of income tax act 1961.

*Includes investment in Annuity Plan, Cumulative Term Deposit, Equity Linked Saving Scheme/Mutual Fund, Fixed Deposit, Housing Loan Principal Repayment, Life Insurance Premium, National Saving Certificates, Public Provident Fund, Sukanya Samridhi Account Scheme, Tuition Fee, Unit Linked Insurance Plan.

2a2. Rent Details Updation

Screen1 / Rent Details Updation

STEP 1
Update Tax Investment Proof details

STEP 2
Upload Tax Investment Proofs

STEP 3
Upload Signed Form 12BB

STEP 4
Submit

Add New Tax Investment Component Click here to select new tax investment components

View Proof for Selected

Last modified on :

PF details

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input checked="" type="checkbox"/> Rent	Section 10(13A)	0.00	0.00	+		

Check the box

Click on add symbol

Screen2 / Rent Details Updation

View Proof for Selected | Edit Selected | Delete Selected | GuideLines

Rent Month	Rental Location	Other Location	Rental Amount	Rental Address	Landlord Name 1	Landlord PAN 1	Landlord Address 1	Landlord Name 2	Landlord PAN 2	Landlord Address 2	Edit
<input checked="" type="checkbox"/> April											
<input checked="" type="checkbox"/> May											
<input checked="" type="checkbox"/> June											
<input checked="" type="checkbox"/> July											
<input checked="" type="checkbox"/> August											
<input checked="" type="checkbox"/> September											
<input checked="" type="checkbox"/> October											
<input checked="" type="checkbox"/> November											
<input checked="" type="checkbox"/> December											
<input checked="" type="checkbox"/> January											
<input checked="" type="checkbox"/> February											
<input checked="" type="checkbox"/> March											

Screen3 / Rent Details Updation

Fill Rent details of April or start month as applicable

After filling, just click on "Fill Down" Icon to copy on selected months

Rent - April

Rental Location: Select
 Other Location:
 Landlord Name:
 Landlord PAN:
 Rental Amount:
 Rental Address:

Rent - May
 Rent - June
 Rent - July
 Rent - August
 Rent - September
 Rent - October
 Rent - November
 Rent - December
 Rent - January
 Rent - February
 Rent - March

Save

Click on 'Save'

To check whether amount is updated or not, please check total amount under proof column on main screen.

Key Points of Point 2a of Step1:

- Employee can edit any data he has updated before
- The way we explained fill-down option, employee can do fill-up options also

:::End of Rent Details under Step 1:::

2b. Step1 Process: Updation of Investment Proof Details

Investment declarations made during the year will reflect on this page. If employee wants to add any investments other than declared ones, he / she can select from the drill-down; in this case, please note that declaration is zero, if it should be considered for Dec/Jan tax computation, update details in tax declaration page first. Employee can directly fill the proof investment.

Screen1 / Updation of Investment Proofs


The screenshot displays the 'Updation of Investment Proofs' interface. At the top, there is a navigation bar with links: TAX INDEX, USER MANUAL, DOCUMENT LIBRARY, REJECTION CODE LIBRARY, FAQ'S, DOWNLOAD FORM 12 BB, and VIEW UPLOADED FILES. Below this is a process flow with four steps: STEP 1 (Update Tax Investment Proof details), STEP 2 (Upload Tax Investment Proofs), STEP 3 (Upload Signed Form 12BB), and STEP 4 (Submit). STEP 1 is highlighted with a red box. Below the flow, there is a section for 'Add New Tax Investment Component' with a dropdown menu. A blue arrow points from this dropdown to a second screenshot below. The second screenshot shows the 'Add New Tax Investment Component' dropdown menu expanded, listing various investment options such as Section 24 - Interest on Housing Loan, Section 80C - Pension Fund Contribution, etc. A red box highlights the 'Existing Declarations' section on the left side of the dropdown menu. The main area of the second screenshot shows a table with columns for 'Proof Amount', 'Add', 'View/Edit', and 'Upload'. The table contains two rows of data, both with a 'Proof Amount' of 0.00. The 'Add' column has a blue plus icon, and the 'View/Edit' column has a blue eye icon. The 'Upload' column has a blue upload icon. The table is titled 'Last modified on : 02 Dec 2021'.

2b1. Step1 Process: Updation of Investment Proof Details

Since there are many investment plans employees may be having, just for understanding, we will be providing illustration for LIP (Insurance) and the process is same for all investments with few additional information / details.

When you want to update the proof details for the components which are available in the below Screen2, kindly select the button "View / Edit" (if available) to view the proof details which is already updated by you during the previous year.

Screen2 / Updation of Investment Proofs: Existing Policies

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	19,000.00	0.00	+		

Once you click on View/ Edit, you will get the below screen

Screen3 / Updation of Investment Proofs: Existing Policies

Add Additional Line Item

+

Back

<

View Proof for Selected

Edit Selected

Delete Selected

GuideLines




All

<input type="checkbox"/>	Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 21-22 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/>	Aditya Birla Sun Life Insurance Company Limited	45345	18/11/2021	100000	75000		<div><div></div></div>

You can select the “Edit” button to update a record and click on “select all” box and click on “Edit selected” to update all the records. If you want to update multiple records (but not all records) then select those records and click on “Edit selected”.

Screen4 / Updation of Investment Proofs: Existing Policies filling LIP Information

You need to fill the remaining details (Number of installment paid / Number of installment payable) only.

Add Additional Line Item +		GuideLines 	Save  Back <
Aditya Birla Sun Life Insurance Company Limited - Policy No. : 45345 +			
Name of the Insurance Company	Premium Amt	Amount Paid on or after 1st Apr 21(Amt)	
Aditya Birla Sun Life Insurance Company Limited	75000		
Policy No.	Frequency	Amount Payable on or before 31st Mar 22(Amt)	
45345	Half yearly		
Date of Commencement (dd/mm/yyyy)	Number of Installment Paid on or after 1st Apr 21 (Count)	Total Amount FY 21-22 (Paid Amt+Payable Amt)	
18/11/2021			
Sum Assured	Number of Installment Payable on or before 31st Mar 22 (Count)	Relationship	
100000		Self	
Save 			

2b2.Update of Investment Proofs: Inclusion of New Policies

If you want to update the proof details for the policies which are not updated by you earlier, then you need to click on the “Add” button.

Screen1 / Updation of Investment Proofs: Inclusion of New Policies

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	19,000.00	0.00	+		

Screen2 / Updation of Investment Proofs: Inclusion of New Policies filling LIP information

Add Additional Line Item +
GuideLines
Save
Back

Line Item 1 +

Name of the Insurance Company

Premium Amt

Amount Paid on or after 1st Apr 21(Amt)

Policy No.

Frequency
Select

Amount Payable on or before 31st Mar 22(Amt)

Date of Commencement (dd/mm/yyyy)

Number of Installment Paid on or after 1st Apr 21 (Count)

Total Amount FY 21-22 (Paid Amt+Payable Amt)

Sum Assured

Number of Installment Payable on or before 31st Mar 22 (Count)

Relationship
Select

Save

Mandatory fields to be filled & the same are in line with Income Tax Act

2b3.Update of Investment Proofs: Edit or Deletion of Investment details

Screen1 / Updation of Investment Proofs: Edit or Deletion of Investment details

Record can be modified in any manner
Complete record can be deleted

View Proof for Selected
Edit Selected
Delete Selected
GuideLines
All

Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 21-22 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/> Aditya Birla Sun Life Insurance Company Limited	45656	14/10/2021	100000	4500	9000	

Follow self-explanatory alert

2c. Step2 Process: Proofs Upload after details updated as explained in Step1

Screen1 / Proofs Upload – e.g. for Rent (Upload icon  will not be available if Proof amount is “Zero”

Upload option will not be available if Proof amount is “zero”

Screen2 / Proofs Upload – Example for Rent (Upload icon  will be available as proof amount > 0

Click on Upload icon to get browse option to select the path

Screen3 / Proofs Uploading – Please read all self-explanatory alerts to ensure accuracy

Section 10(13A) - Rent

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

[Browse...](#)

☐ Yes, I have submitted rent receipt for each month

☐ Yes, I have submitted declaration form for January

☐ Yes, I have submitted landlord PAN card copy which

When clicked on browser option, it will ask for the path where softcopy of proofs stored

Ensure that relevant proofs to be uploaded under the respective investment line item & select the check box.

1. **Maximum/Overall File size allowed for upload is 10 MB.**
2. **File types are restricted to .pdf, .jpg, .xps..**
3. **Form 12BB should not be uploaded here.It should be uploaded under 'Form 12BB upload'.**

Section 10(13A) - Rent

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

No file chosen

[Remove](#) Rent.pdf

[Remove](#) Future Declaration Form.pdf

☒ Yes, I have submitted rent receipt for each month for

☒ Yes, I have submitted declaration form for January to

☐ Yes, I have submitted landlord PAN card copy which

Once proofs are uploaded, if wrong files attached, the same can be reloaded after removing it.

1. **Maximum/Overall File size allowed for upload is 10 MB.**
2. **File types are restricted to .pdf, .jpg, .xps..**
3. **Form 12BB should not be uploaded here.It should be uploaded under 'Form 12BB upload'.**

The process of upload is same for all investments.

Screen4 / Proofs Upload – Cross-checking Uploaded Files

STEP 1: Update Tax Investment Proof details

STEP 2: Upload Tax Investment Proofs

STEP 3: Download Form 12 BB

STEP 4: Submit

VIEW UPLOADED FILES

Please cross-check whether your proofs are uploaded successfully

Once proofs are loaded the upload icon color will change from red to green.

Upload icon color in red means no proofs loaded.

Investments	Income Tax Section No.	Amount	Upload
<input type="checkbox"/> Rent	Section 10(13A)	8,300.00	
<input type="checkbox"/> Life Insurance Premium	Section 80C	9,000.00	

Screen5/ Proofs Upload – Cross-checking Uploaded Files

VIEW UPLOADED FILES

Uploaded File(s) - 3 File(s) - 0.39 MB / 10 MB

[LIC_Dec2020.pdf](#)

[LIC Receipt_Dec'19.pdf](#)

[LIC receipt_Jun'2020.pdf](#)

If wrong file uploaded, then the same can be deleted and reloaded

Close

2d. Step3 Process: Formalities of Form 12BB (Must do)

Screen1 / Form 12BB Formalities – Downloading Form 12BB

STEP 1: Update Tax Investment Proof details

STEP 2: Upload Tax Investment Proofs

STEP 3: Download Form 12 BB

STEP 4: Submit

DOWNLOAD FORM 12 BB

VIEW UPLOADED FILES

Please note that Digital Form 12BB is mandated as per Income Tax Act

2d1. Step3 Process: Formalities of Form 12BB (Must do)

Download Form 12BB and sign (Manual or e-sign), scan / clear mobile photo / digitally sign and then upload in the tool (see the screen 2 below & also refer last page for the steps how to apply digital signature on the form)

2d2. Step3 Process: Formalities of Form 12BB (Must do)

Screen2 / Uploading of signed (Manual or e-sign) Form 12BB

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

STEP 1 Update Tax Investment Proof details STEP 2 Upload Tax Investment Proofs STEP 3 Upload Signed Form 12BB STEP 4 Submit

Add New Tax Investment Component [Click here to select new tax investment components](#)

[View Proof for Selected](#)

[Form 12BB Upload](#)

Last modified on : 02 Dec 2021

Kindly upload signed Form 12 BB to consider your Tax investment proofs. Tax investment proofs will not be considered if signed Form 12 BB is not uploaded.
Kindly do not upload password protected file. Password protected file will not be considered.

[Browse...](#)

[Upload](#)

☐ Yes, I have attached Signed Form 12 BB

1. Maximum/Overall File size allowed for upload is 10 MB.
2. File types are restricted to .pdf, .jpg, .xps..
3. Only Signed Form12BB should be uploaded here.

[Close](#)

2e. Step4 Exit from the Process: Submit

Please note that once submit button is clicked, nothing can be done in the tool except viewing proofs / checking proof status.

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

STEP 1 Update Tax Investment Proof details STEP 2 Upload Tax Investment Proofs STEP 3 Upload Signed Form 12BB STEP 4 Submit

Add New Tax Investment Component [Click here to select new tax investment components](#)

[View Proof for Selected](#)

[Form 12BB Upload](#)

Last modified on : 02 Dec 2021

[Future Declaration Form](#)

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Rent	Section 40(13A)	0.00	8,300.00		View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	75,000.00	9,000.00	+	View/Edit	Upload

[Submit](#) Any activity will not be permitted after submission

How to apply Digital Signature on Form 12BB & Future Declaration Form in PDF

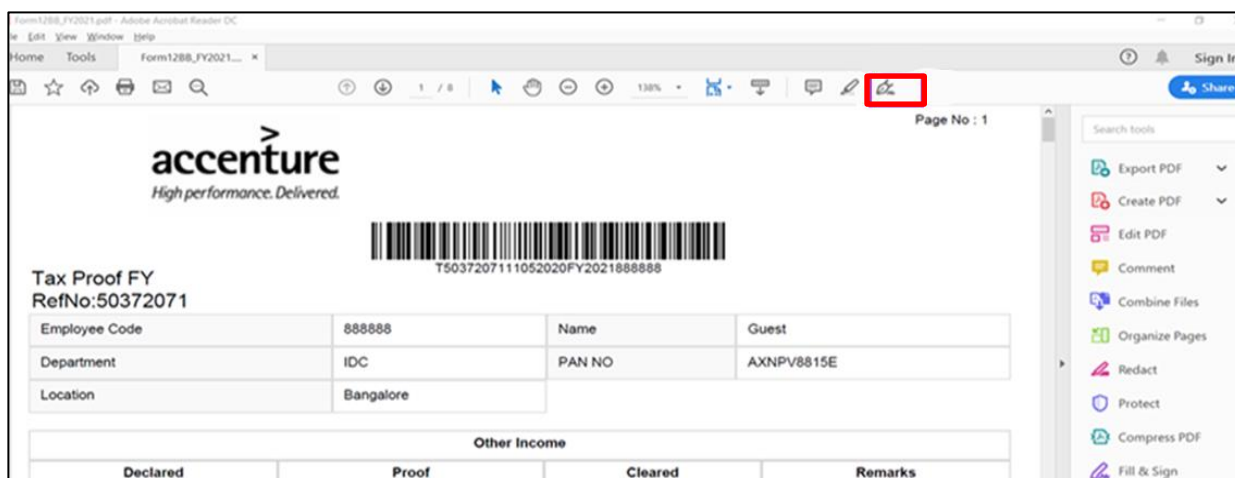
Below are the Guidelines for Digitally Signing Tax Proof Doc & Form 12BB in PDF-

Step 1: Download the tax form (Tax Proof Details FY 20-21 & Form 12BB)

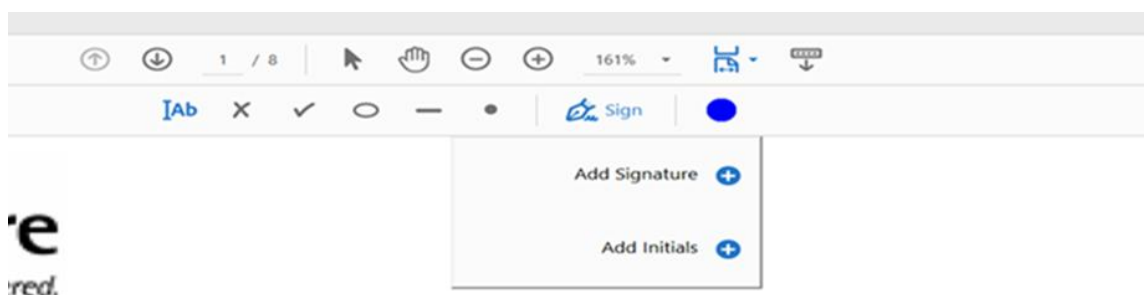
Step 2: All details are pre-filled based on the updates done in tax proof page.

Step 3: Open the Form 12 BB file with Acrobat Reader DC which is already installed in all Accenture System

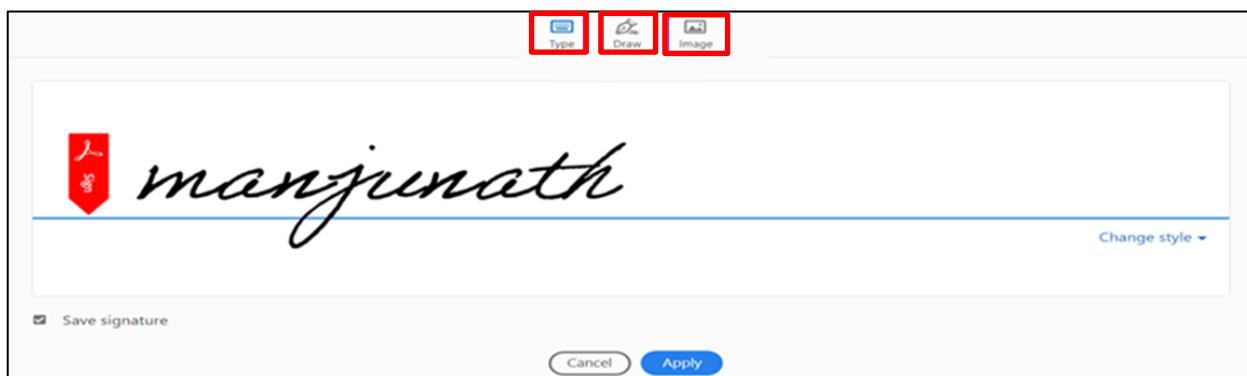
Step 4: Navigate to the top of the document, there is pen icon (Sign document by typing or drawing a signature) as shown in below.



Step 5: Click Sign, and then select Add Signature.



Step 6: A popup will open, giving three options, **Type** (Type the name) or **Draw** (Draw using a mouse) or **Image** (Signature image can be attached) as shown below.



Option 1 (Type the name) OR Option 2 (Draw using a mouse) / Option 3 (Image can be attached)

manjunath
(Signature of the employee)
Full Name: Guest

[Handwritten signature]
(Signature of the employee)
Full Name: Guest

Step 7: Paste the saved **signature** in the signature place inside the **PDF** file.

Step 8: Save the Digitally Signed copy and upload in Allsec Tax Proof Submission Page