



Online Investment Proof submission Form (IPSF) Walkthrough - 2018-2019

Contents

Locating the IPSF 2018-2019 Link

Section(s) & Item(s) Selection

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
- Section C Chapter VIA - Section 80C
- Section D Housing Loan (Interest and Principal)
- Section E Previous Employer Details
- Section G Other Income

IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure

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IPSF 2018-2019 Link

The screenshot displays the Excelity Global user interface. On the left, a vertical sidebar contains several menu items: 'My Personal Details', 'My Transactions', 'My Reports', 'Downloads', 'Password', and 'Year End'. The 'Year End' item is expanded, revealing a sub-menu where 'IPSF 2018-2019' is highlighted with a red rectangular box. A green button labeled 'Click here' has an arrow pointing to this highlighted link. The main content area on the right features a welcome message: 'Welcome to Excelityglobal - your personal space of Payroll details!! We hope you will find this useful. For more information, please contact info@excelityglobal.com.' Below this, there is a section titled 'What would you like to do?' with a button 'View Latest Payroll'. At the bottom of the main area, a message states: 'Please send your reimbursement bills along with voucher ID generated in Excelityglobal to: Excelity Global -'.

My Personal Details

My Transactions

My Reports

Downloads

Password

Year End

IPSF 2018-2019

Welcome to Excelityglobal - your personal space of Payroll details!! We hope you will find this useful. For more information, please contact info@excelityglobal.com.

What would you like to do?

View Latest Payroll

Please send your reimbursement bills along with voucher ID generated in Excelityglobal to: Excelity Global -

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Section & Item Selection

Section A - HRA

- ☒ Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

Section B - Chapter VI A - Deductions from Total Income

- ☒ Medical Insurance Premium (U/s 80D)
- ☒ Medical Treatment/Handicapped Dependent (U/s 80DD)
- ☒ Interest on Educational Loan (U/s 80E)
- ☒ Permanent Physical Disability (80U)
- ☒ Rajiv Gandhi Equity Savings Scheme (80CCG)
- ☒ Medical Treatment of Specified Diseases (80DDB)
- ☒ Additional NPS Employee Contribution(80CCD1B)

Section C - Chapter VIA - Section 80C

- ☒ Contribution to Pension Fund (80CCC)
- ☒ Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc
- ☒ Public Provident Fund (PPF)
- ☒ National Savings Certificate (NSC)
- ☒ Infrastructure Bonds
- ☒ Children Education Tuition fees
- ☒ Equity Linked Savings Scheme (ELSS)
- ☒ Mutual Funds
- ☒ Unit Linked Insurance Plan
- ☒ NPS Employee Contribution
- ☒ Sukanya Samriddhi Scheme
- ☒ Fixed Deposit Scheme (Block Period of 5 yrs)
- ☒ NSC Interest (Will also be considered as Other Income)

Section D - Housing Loan

- ☒ Loss from House Property - SELF OCCUPIED
- ☒ Loss from House Property - LETOUT

Section E - Previous Employer Details

- ☒ Previous Employer Details

Section G - Other Income

- ☒ Other Income

Key Points:

- Select (tick) the item within the section for which you wish to submit proofs, and click on 'Proceed' .

Note:

- If no section is selected, 'Proceed' button will not be enabled.
- Selection of Investment categories will not be allowed after the final confirmation of IPSF .

Click here to
Proceed



Proceed

Section & Item Selection

Section A - HRA

☒ Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

Section B - Chapter VI A - Deductions from Total Income

☒ Medical Insurance Premium (U/s 80D)

☒ Medical Treatment/Handicapped Dependent (U/s 80DD)

☒ Interest on Educational Loan (U/s 80E)

☒ Permanent Physical Disability (U/s 80U)

☒ Rajiv Gandhi Equity Savings Scheme (RGESS)

☒ Medical Treatment of Specified Diseases (U/s 80C)

☒ Additional NPS Employee Contribution (U/s 80CCD(1B))

Section C - Chapter VIA - Section 80C

☒ Contribution to Pension Fund (U/s 80C)

☒ Life Insurance Premium (Jeevan Suraksha)

☒ Public Provident Fund (PPF)

☒ National Savings Certificate (NSC)

☒ Infrastructure Bonds

☒ Children Education Tuition fee (U/s 80C)

☒ Equity Linked Savings Scheme (ELSS)

☒ Mutual Funds

☒ Unit Linked Insurance Plan (ULIP)

☒ NPS Employee Contribution (U/s 80CCD(1B))

☒ Sukanya Samriddhi Scheme

☒ Fixed Deposit Scheme (Block Period of 5 yrs)

☒ NSC Interest (Will also be considered as Other Income)

Section D - Housing Loan

☒ Loss from House Property - SELF OCCUPIED

☒ Loss from House Property - LETOUT

Section E - Previous Employer Details

☒ Previous Employer Details

Section G - Other Income

Message from webpage



- Go through the guidelines document regarding the proof submission shared thru e-mail.
- Please ensure to have the hardcopies of all your investment proofs before proceeding further.
- Do not confirm the IPSF unless you fill the sections that are applicable to you.
- Use Save & View option for draft report.
- Click on confirm button after updating the relevant proofs. Once you confirm the IPSF, the IPSF submission will be locked for editing.

Read this note carefully and click here to proceed

OK

item within the section for submit proofs, and click on

- If no section is selected, 'Proceed' button will not be enabled.
- Selection of Investment categories will not be allowed after the final confirmation of IPSF.

Click here to Proceed

Proceed

Master Information & Employee Options

All the sections/items selected, can be viewed & navigated in this menu bar

Master Information

Fields marked with (*) are mandatory.

Employee ID :	14782	Employee Name :	Shakthi. R	Gender :	F
Date of Joining :	01/09/2016	Date of Birth :	15/09/1983	PAN * :	ABCPD1234T
No. of Children * :	1	Children Going to School * :	0	Children Staying in Hostel * :	0

[Have a Query?](#)

Dependant Details

Fields marked with (*) are mandatory.

Modify the No. of children (if required)

Dependant Name*	Relationship*	Age*	
Shakthi. R	Self	30	Delete
Rakesh	Father	60	Delete
Ragini	Mother	55	Delete
Rohan	Spouse	32	Delete
Sony	Daughter	3	Delete

Update all the master details. Fields with * are mandatory

Click here to understand the requirement of the relevant section

Add New Row

Note : 1) Age to be rounded off to the nearest number.

Click here to delete rows (Except Self)

Previous

Save

Next

Click here to add new rows

Click here to save all the information

Click here to view the next page/section

Employee Options

- [Employee Details Screen](#)
- [HRA Rent Details](#)
- [Medical Insurance \(SEC80D\)](#)
- [Medical Treatment \(SEC80DD\)](#)
- [Education Loan Interest \(SEC80E\)](#)
- [Physical Disability \(SEC80U\)](#)
- [Rajiv Gandhi Equity Savings Scheme \(80CCG\)](#)
- [Medical Treatment of Specified Diseases \(80DDB\)](#)
- [Additional NPS Employee Contribution](#)
- [Pension Fund \(SEC80C\)](#)
- [LIC \(SEC80C\)](#)
- [PPF \(SEC80C\)](#)
- [NSC \(SEC80C\)](#)
- [Infrastructure Bonds \(SEC80C\)](#)
- [Children Education Fees \(SEC80C\)](#)
- [ELSS \(SEC80C\)](#)
- [Mutual Funds \(SEC80C\)](#)
- [ULIP \(SEC80C\)](#)
- [NPS Employee Contribution](#)
- [Sukanya Sumriddhi Scheme.](#)
- [Term Deposits \(SEC80C\)](#)
- [NSC Interest \(SEC80C\)](#)
- [Housing Loan - Self \(SEC24\)](#)
- [Housing Loan - Letout \(SEC24\)](#)
- [Previous Employer Details](#)
- [Other Exemptions](#)
- [Other Income](#)

Key Points:

- If PAN is incorrect, please update the PAN using 'Update PAN' Link, under "My Personal Details" tab.
- Row containing 'Self' cannot be deleted.

Note: If you want to select additional Investment categories in any of the sections, while updating IPSF, Go back to the **"IPSF 2018-2019"** link on the home page under the Year End tab.

Master Information – Sample Page

Update for Master Details successfully saved.

You will receive this message upon 'saving' details on every screen

Master Information

Fields marked with (*) are mandatory.

[Have a Query?](#)

Employee ID :	14782	Employee Name :	Shakthi. R	Gender :	F
Date of Joining :	01/09/2016	Date of Birth :	15/09/1983	PAN * :	ABCPD1234T
No. of Children * :	1	Children Going to School * :	0	Children Staying in Hostel * :	0

Dependant Details

Fields marked with (*) are mandatory.

Dependant Name*	Relationship*	Age*	
Shakthi. R	Self	30	Delete
Rakesh	Father	60	Delete
Ragini	Mother	55	Delete
Rohan	Spouse	32	Delete
Sony	Daughter	3	Delete

Add New Row


Father name is mandatory in Form 12BB. Update the Father name if the details are not available in Dependent details

Entering Dependents' details is a one time activity. This data will automatically appear in the other screens as applicable

Note : 1) Age to be rounded off to the nearest number.

Previous Save Next

Message from webpage

 Father Name is Mandatory in Form 12BB. Please ensure to update the same in "Master Information Screen".

OK

Pop up message for information

Agenda Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

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HRA- Rent Payment Details

Only Original rent receipts are valid proofs

Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Property Id	From Date * (dd/mm/yyyy)	To Date * (dd/mm/yyyy)	Rent Per Month *	Period Rent	Address *	State *	City *	Other City	Metro
1	01/04/2017	31/03/2018	10500.00	126000.00	No. 123, 2nd Cross, 5th main, JP Nagar	KARNATAKA	BANGALORE		N

To compliant with top 10 OWASP vulnerabilities following special characters are not allowed !@#\$%^&*()+=[]\|';`|~<:>?

Add New Row

Delete Last Row

Land Lord Details			
1	Landlord Name: Rohan	Landlord PAN: ABCPD1256Z	Landlord Address: No 456, JC Road, Bangalore
			Multiple Owners for rent property: No
		Add Row	Delete Row

PAN of landlord is mandatory if Rent Per Month is greater than 8,333/-

Number of supporting documents : 4

Enter the number of documents that you will submit towards this section/item

Previous Save Next

Select Multiple Landlords Yes or No

Key Points:

- From & To Date must be within 1st April, 2018 to 31st March, 2019
- If you have joined the organization after 1st April, 2018, then your DOJ becomes the 'From Date'
- Delhi, Mumbai, Chennai, & Kolkata are 'Metro' cities

Content Tracker

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Medical Insurance Premium (U/s 80D)

Medical Insurance Premium (U/s 80D)

Fields marked with (*) are mandatory.

Have a Query?

Expense Type	Policy # Receipt No*	Date of Payment (dd/mm/yyyy)*	Status of Payment *	Name of Policy Holder *	Relationship	Age	Amount *	Mode *	Cheq/Ref #	
Medical Insurance Premi ▾	4512	12/05/2017	Paid ▾	Shakthi. R ▾	Self	30	12485.00	e-Paymen ▾		Delete
Preventive Medical Ched ▾	4512	16/09/2017	Paid ▾	Rakesh ▾	Father	60	5000.00	Cheque ▾		Delete

Add New Row

Note : 1) Rs.25000- In case of Individual, Spouse & Children.
2) Additional benefit of 25000/- in case of parents below 60 years and Rs.30000 in case of parents above 60 years (Senior citizens).

Number of supporting documents : 2

Previous Save Next

Details automatically appear upon selecting the name basis "Master Information" screen

Key Points:

- Benefit under this section can be claimed for Self, Spouse, Children, & Parents
- Late Fee does not qualify for exemption.

Treatment/Handicapped Dependent (U/s 80DD)

Medical Treatment/Handicapped Dependent (U/s 80DD)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Name of Dependent *	Relationship	Percentage *	Amount *	
Rakesh	Father	More than or equal to 80%	125000.00	Delete

Add New Row

Note : 1) Form 10-IA duly signed by a Government certified Medical Practitioner should be attached without which the benefit under this section will not be considered. [Download](#)

2) No benefit, if the disability is less than or equal to 40%.

3) Limited to Rs. 75000/-, if the disability is more than 40% and less than 80%.

4) If the disability is more than or equal to 80%, Rs. 125000/-.

Number of supporting documents :

Previous

Save

Next

Key Points:

- Benefit under this section can be claimed for Dependents only

Interest on Educational Loan (U/s 80E)

Interest on Educational Loan (U/s 80E)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Loan Repayment Date (dd/MM/yyyy)*	Name*	Relationship	Interest Amount*	
12/05/2017	Shakthi. R	Self	135000.00	Delete

Add New Row

Number of supporting documents : 1

Previous Save Next

Key Points:

- Benefit under this section can be claimed for Self, Spouse, & Children

Permanent Physical Disability (80U)

Permanent Physical Disability (80U)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Name of the Assesse	Relationship	Percentage*	Amount	
Shakthi. R	Self	More than or equal to 40% and less than 80% ▼	75000.00	Delete

- Note :**
- 1) Form 10-IA duly signed by a Government certified Medical Practitioner should be attached without which the benefit under this section will not be considered. [Download](#)
 - 2) No benefit, if the disability is less than or equal to 40% .
 - 3) Limited to Rs. 75000/-, if the disability is more than 40% and less than 80%.
 - 4) If the disability is more than or equal to 80%, Rs. 125000/-.

Number of supporting documents : 1

Previous

Save

Next

Key Points:

- Benefit under this section can be claimed for Self only

Rajiv Gandhi Equity Savings Scheme (80CCG)

Rajiv Gandhi Equity Savings Scheme (80CCG)

Fields marked with (*) are mandatory.

Have a Query?

Company or Fund Name *	Date of Purchase* (dd/mm/yyyy)	Name of the Share Holder *	Transaction Number *	Amount Invested *	
Bharat Heavy Electricals L ▼	15/06/2016	Shakthi. R	2	50000.00	Delete

Total invested amount under 80CCG.

Qualifying Amount (50% of invested amt) max Rs.25000

50000.00

25000.00

Add New Row

Note :

- 1) Eligibility Criteria - Assessee must be a new investor
- 2) Never invested in the equities/ never traded in equity derivatives before announcement of 80CCG
- 3) May have demat account but no transaction in equity must have done before announcement of 80CCG

Number of supporting documents : 2

Previous

Save

Next

Note:

- Refer to the next slide for information on Rajiv Gandhi Savings Scheme (80CCG)
- Deduction under this section shall be allowed if the purchase date is within the Financial Year 2015-16 and 2016-17

Rajiv Gandhi Equity Savings Scheme (80CCG) - Guidelines

80CCG	Rajiv Gandhi Equity Savings Scheme	<p>Copies of A&B</p> <p>A. The Demat account with the details of investments made in</p> <ol style="list-style-type: none"> 1. Shares given under BSE100 2. Shares given in CNX100 3. Shares of Navratnas, Maharatnas and Miniratnas companies 4. Follow on public offers of above companies 5. IPO (initial public offers) of PSUs. 6. Mutual funds who has invested in above five type of shares shown above. 7. ETF (exchange traded funds) invested money only in 1-5 sr number shown above, <p>B. Copy of Form A - declaration to be submitted by depository participant, or copy of Form B - declaration to be submitted by the new retail investor.</p>	<p>Amount of deduction is at 50% of amount invested in equity shares. However, the amount of deduction under this provision cannot exceed Rs. 25,000</p> <p>The assessee is a new retail investor - a) any individual who has not opened a demat account and has not made any transactions in the derivative segment as on the date of notification of the Scheme; (b) any individual who has opened a demat account before the notification of the Scheme but has not made any transactions in the equity segment or the derivative segment till the date of notification of the Scheme,</p>	<p>Tax Benefit will not be extended, If the gross total income exceeds Rs. 12 lakhs;</p> <p>Investment made in companies other than the listed.</p>
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Medical Treatment for Specific Disease (U/s 80DDB)

Medical Treatment of Specified Diseases (80DDB)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Name of Dependent *	Relationship *	Disease Name *	Age *	Actual Medical Expenses (A)	Max limit allowed (B)	Amount reimbursed by Employer/Insurance Company (if any) (C) *	Total Benefit amount
Rakesh	Father	Thalassaemia	80	100000.00	80000.00	0.00	80000
Delete							
Add New Row							

Select the specified diseases, as certified by the Specialist

Number of supporting documents : 1

[Previous](#) [Save](#) [Next](#)

Note:

- Form 10 I to be certified by from a neurologist, an oncologist, a urologist, a haematologist, an immunologist or such other specialist, working in a Government hospital
- Deduction under this section shall be reduced by the amount received, if any, under an insurance from an insurer, or reimbursed by an employer.

Additional National Pension Scheme Contribution (80CCD1B)

Additional NPS Employee Contribution(80CCD1B)

Fields marked with (*) are mandatory.

[Have a Query?](#)

NPS PRAN Number *	Date of Payment* (dd/mm/yyyy)	Name of Account Holder *	Relationship	Amount *	
41256789	16/09/2017	Shakthi. R	Self	25000.00	Delete

Add New Row

Total : 25000.00

Note : 1) Maximum eligibility criteria for Additional NPS Employee Contribution is Rs. 50000/-.

Number of supporting documents : 1

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Contribution to Pension Fund (80CCC)

Investment Proofs Submission Form 2016-2017

Contribution to Pension Fund (80CCC)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Payments

Policy#*	Date Of Payment* (dd/mm/yyyy)	Name Of Policy Holder*	Amount*	Status Of Payment*	Frequency *	
12345	25/10/2017	SHAKTHI. R	25000.00	Paid	Yearly	Delete

Total Amount : 25000.00

Add New Row

Note : 1) Section 80CCC deduction is in respect of contribution to certain pension funds .
2) Maximum eligibility criteria for Pension Policy - 80CCC is Rs. 150000/-.

Number of supporting documents : 5

Previous

Save

Next

Key Points:

- Benefit under this section can be claimed for Self only
- Policy should specify that the benefit is eligible u/s 80CCC (Pension).

Life Insurance Premium

Investment Proofs Submission Form 2016-2017

Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc

Fields marked with (*) are mandatory.

[Have a Query?](#)

Payments

Policy # *	Policy Purchase Date (dd/mm/yyyy)	Date of Premium Payment * (dd/mm/yyyy)	Status of Payment *	Name of Policy Holder *	Sum Assured *	Premium Amount * (Excluding Late Fee)	Frequency *	Single Premium Policy	
12345	25/10/2017	15/07/2016	Paid	SHAKTHI. R	100000.00	25000.00	Yearly	No	Delete

Total Premium Amount : 25000.00

Add New Row

Summary appears upon saving the LIC premium details

Summary			
Policy #	Sum Assured	Total Premium Amount	Considered for 80C
12345	100000.00	25000.00	20000.00
Total :		25000.00	20000.00

- Note :**
- 1) Late Payment Fee will not qualify for deduction under section 80C.
 - 2) Tax benefit on LIC premium payment will be restricted to a max of 10% or 20% of sum assured based on the policy purchase date:
 - 20% of the sum assured for policy purchased before 1st April 2012
 - 10% of the sum assured for policy purchased after 1st April 2012
 - 3) Maximum eligibility criteria for Life Insurance Premium is Rs. 150000/-.

Number of supporting documents : 5

Previous

Save

Next

Public Provident Fund (PPF)

Public Provident Fund (PPF)

Fields marked with (*) are mandatory.

[Have a Query?](#)

PPF A/c Number *	Date of Payment* (dd/mm/yyyy)	Name of Policy Holder *	Relationship	Amount *	
7458936	16/09/2017	Rohan ▼	Spouse	150000.00	Delete

Add New Row

Total : 150000.00

- Note :**
- 1) Provident Fund (PF) & Voluntary Provident Fund (VPF) deducted from your salary will be automatically considered for exemption
 - 2) Maximum eligibility criteria for Public Provident Fund is Rs. 150000/-.

Number of supporting documents : 1

[Previous](#) [Save](#) [Next](#)

Key Points:

- PPF can be in the name of Self, Spouse, & Children

National Savings Certificate (NSC)

National Savings Certificate (NSC)

Fields marked with (*) are mandatory. [Have a Query?](#)

Certificate Number*	Date of Purchase* (dd/mm/yyyy)	Name of Policy Holder*	Amount*	
45712	16/09/2017	Shakthi. R	85000.00	Delete

Add New Row

Total : 85000.00

Note : 1) Maximum eligibility criteria for National Savings Certificate - NSC is Rs. 150000/-.

Number of supporting documents : 2

Previous

Save

Next

Key Points:

- NSC must be in the name of Self only

Infrastructure Bonds

Infrastructure Bonds

Fields marked with (*) are mandatory.

[Have a Query?](#)

Application No. *	Date of Payment * (dd/mm/yyyy)	Name of Person	Name of the Infrastructure Fund *	Amount *	
74589	25/09/2017	Shakthi. R	IDBI Infrastructure bond	60000.00	Delete

Total Amount : 60000.00

Add New Row

Note : 1) Maximum eligibility criteria for Infrastructure Bonds - IBOND is Rs. 150000/-.

Number of supporting documents : 2

Previous

Save

Next

Children Education Tuition fees

Children Education Tuition fees

Fields marked with (*) are mandatory.

[Have a Query?](#)

Receipt Number *	Date of Payment* (dd/mm/yyyy)	Status of Payment	Name of Child *	Term / Tuition Fees Paid *	Frequency *	Class *	
41256	16/09/2017	Paid ▼	Sony ▼	5500.00	HalfYearly ▼	V	Delete

Add New Row

Total Fees Paid : 5500.00

- Note :**
- 1) Only Tuition / Term Fees will be considered for income tax benefit.
 - 2) Donations, Capitation fees, Development fees or payment of similar nature are not allowed.
 - 3) Tuition / Term Fees paid supported by receipts issued by the school, college, university or educational institution.

Number of supporting documents : 2

Previous

Save

Next

Key Points:

- Benefit can be claimed on 'Tuition / Term Fees' only.

Equity Linked Savings Scheme (ELSS)

Equity Linked Savings Scheme (ELSS)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Company or Fund Name *	Allowed U/s 80C *	From Month *	To Month *	Name of Policy Holder	Folio # *	Total Amount for the period *	Status of Payment *	
DSP Black	Yes ▼	Apr-17 ▼	Oct-17 ▼	SHAKTHI R	7459	5000.00	Paid ▼	Delete

Total Amount : 5000.00

Add New Row

Note : 1) Maximum eligibility criteria for Equity Linked Savings Scheme - ELSS is Rs. 150000/-.

Number of supporting documents : 2

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- Policy should specify that the benefit is eligible u/s 80C

Mutual Funds

Mutual Funds

Fields marked with (*) are mandatory.

[Have a Query?](#)

Company or Fund Name *	Allowed U/s 80C *	From Month *	To Month *	Name of Policy Holder	Folio # *	Total Amount for the period*	Status of Payment *	
41256	Yes ▾	Apr-17 ▾	Oct-17 ▾	SHAKTHI. R	41256	12000.00	Paid ▾	Delete

Total Amount : 12000.00

Add New Row

Note : 1) Maximum eligibility criteria for Mutual Fund - MF is Rs. 150000/-.

Number of supporting documents : 6

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- Statement should specify that the benefit is eligible u/s 80C

Unit Linked Insurance Plan

Unit Linked Insurance Plan

Fields marked with (*) are mandatory.

[Have a Query?](#)

Payments

Policy#*	Date Of Payment* (dd/mm/yyyy)	Name Of Policy Holder*	Premium Amount*	Frequency*	Status Of Payment*	
74256	25/10/2017	SHAKTHI. R	24000.00	Half-Yearly	Paid	Delete

Total Amount : 24000.00

Add New Row

Note : 1) Maximum eligibility criteria for Unit Linked Insurance Plan - ULIP is Rs. 150000/-.

Number of supporting documents : 4

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self, Spouse, & Children
- Policy should specify that the benefit is eligible u/s 80C

National Pension Scheme (NPS)

NPS Employee Contribution

Fields marked with (*) are mandatory.

[Have a Query?](#)

NPS PRAN Number *	Date of Payment* (dd/mm/yyyy)	Name of Account Holder *	Relationship	Amount *	
4125689	25/10/2017	Shakthi. R	Self	25000.00	Delete

Add New Row

Total : 25000.00

Note: 1) Maximum eligibility criteria for NPS is Rs. 150000/-.

Number of supporting documents : 2

Previous

Save

Next

Sukanya Sumriddhi Scheme

Sukanya Samriddhi Scheme

Fields marked with (*) are mandatory.

[Have a Query?](#)

A/c Number *	Date of Payment* (dd/mm/yyyy)	Name of Policy Holder *	Relationship	Amount *	
789456	25/10/2017	Sony	Daughter	150000.00	Delete
Add New Row				Total :	150000.00

- Note :**
- 1) Sukanya Sumriddhi Scheme deducted from your salary will be automatically considered for exemption
 - 2) Maximum eligibility criteria for Sukanya Sumriddhi Scheme is Rs. 150000/-.

Number of supporting documents : 2

Previous

Save

Next

Key Points:

- Benefit can be claimed for Daughter only.

Term/Fixed Deposit Scheme (Block Period of 5 years)

Term / Fixed Deposit Scheme (Block period of 5 years)

Fields marked with (*) are mandatory.

Have a Query?

Payments*

Type of Deposit*	Allowed U/S 80C*	A/C Number*	Date of Payment (dd/mm/yyyy)*	Name of Policy Holder*	Amount*	
FDS	Yes	45789	25/10/2017	Shakthi. R	15000.00	Delete

Total Amount : 15000.00

Add New Row

Note : FDS Fixed Deposit Scheme - Maximum eligibility criteria is Rs. 150000/-.
FDSC Fixed Deposit Senior Citizen - Maximum eligibility criteria is Rs. 150000/-.
POST Post Office Savings - Maximum eligibility criteria is Rs. 150000/-.

Number of supporting documents : 1

Previous Save Next

Key Points:

- Benefit can be claimed for Self only.
- Term deposits should be for a minimum period of 5 years

NSC Interest (also considered as Other Income)

NSC Interest (Will also be considered as Other Income)

Fields marked with (*) are mandatory.

[Have a Query?](#)

Certificate Number *	Date of Purchase* (dd/mm/yyyy)	Name of Policy Holder *	Amount *	Interest Earned *	
72356	25/10/2017	Shakthi. R	150000.00	0.00	Delete
Add New Row			Total Interest : 0.00		

- Note :**
- 1) The total interest would be considered as part of other income for income tax calculation.
 - 2) Maximum deduction allowed on interest on NSC u/s 80C is Rs.150000/-

Number of supporting documents : 1

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- NSC certificate should have been taken on or after April 01, 2011

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
- Section C Chapter VIA - Section 80C
- Section D Housing Loan
- Section E Previous Employer Details
- Section G Other Income

IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure

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Loss from House Property – Self Occupied

LOSS FROM HOUSE PROPERTY - SELF OCCUPIED

Fields marked with (*) are mandatory.

Have a Query?

Key Points:

- Lender PAN and Address of the Lender is mandatory to update.
- Interest and Pre EMI-Interest can be claimed only if the property has been occupied before 31st March, 2019; however, Principal can be claimed
- Stamp Duty/Registration charges can be claimed if they are paid in FY 2018-2019
- If it's a Joint Loan, the percentage of benefit claimed by the individual must be specified
- Maximum of Rs 50000/- benefit will be given U/S 80 EE if the housing loan sanctioned Date in FY 2016-2017, loan sanctioned amount should not exceed Rs 35 lakhs and value of the property should not exceed Rs 50Lakhs.

Click here to update stamp duty alone

Stamp duty

Housing Loan Repayment Certificate* ☒ Yes ☐ No

Loan Lender/Bank Name* HDFC

PAN of the Lender* ABCPD1425Z

Address of the Lender* Kasturba road, bangalore

Address of the Property* No. 123, 1st main, 2nd Cross

State* KARNATAKA

City* BANGALORE

Loan Sanction Date 15/08/2015 (dd/mm/yyyy)

Purpose of Housing Loan Purchase

Stamp Duty/Reg. Chrg Paid Date (dd/mm/yyyy)

Loan Sanction Amount

Do you own any other house property ☐ (If Yes, check the box)

Total Interest Paid 4142563.00

Total Principal Paid (Section 80C Benefit) 541263.00

Year Code	Amount	Year Code	Amount
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
2013-2014	0.00	2012-2013	0.00
Total :		0.00	

Loan Type ☒ Single ☐ Joint

Borrower Name Percentage(%)

GOPAL KRISHNAN PANIKAR	100

Year Code	Amount	Year Code	Amount
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
2013-2014	0.00	2012-2013	0.00
Total :		0.00	

Housing Loan Interest & Principal considered for Tax Benefit

Total Interest	Total Principal	Benefit U/S 80EE
200000.00	541263.00	0.00

Note : 1) Maximum eligibility for Housing Loan Self Occupied Property is Rs. 200000/-.

Number of supporting documents : 5

Previous

Save

Clear

Next

Loss from House Property – Let Out

LOSS FROM HOUSE PROPERTY - LETOUT

Fields marked with (*) are mandatory.

CHECK IT

Let Out Property #

Provisional Certificate Attached

Loan Lender/Bank Name*

PAN Of Lender*

Address of the Lender *

Address of the Property *

State *

City *

Loan Sanction Date †

Purpose of Housing Loan

Date of Occupation/Possession †

Stamp Duty/Reg. Charg Paid Date †

Stamp Duty/Reg. Charg Paid Amt

Total Principal Paid

Total Interest Paid

Pre-EMI Interest Paid

	2017-2018	2016-2017	2015-2016	2014-2015	2013-2014	2012-2013

Click here to update stamp duty alone

☐ Stamp ☐ Income

Let Out Property 1

Yes

ICICI

ABCPD1234Z

No.75, KK Road, Bangalore

No 123, 1st Main, 2nd Cross, MG Road

KARNATAKA

Bangalore

15/09/2012

Purchase

25/02/2015

354250.00

245781.00

	Paid	Qualifying
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00

Click here to update Let-out Income

Rental Income Received for 2017-2018

Municipal Tax Paid For the Year

Net Annual Value

Repair and Maintenance Charges (30%)

Loan Type

Self Percentage

Total Interest Portion

Income / Loss on House Property

Total Principal

24000.00

1500.00

22500.00

6750.00

Single

100

245781.00

-230031.00

354250.00

Clear

Total Income / Loss for all Properties -230031.00

Total Principal for all Properties 354250.00

Add Property Delete Property

Key Points:

- Interest and Pre EMI Interest can be claimed only if the property has been occupied before 31st March, 2019; however, Principal can be claimed.
- Lender PAN and Address of the Lender is mandatory to update.
- If it's a Joint Loan, the percentage of benefit claimed by the individual must be specified
- Stamp Duty/Registration charges can be claimed if they are paid in FY 2018-2019
- Rental income/notional income is mandatory to claim tax benefit under this section

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
- Section C Chapter VIA - Section 80C
- Section D Housing Loan
- Section E Previous Employer Details
- Section G Other Income

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Forms & Annexure

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Previous Employer Details

Previous Employer Details

Fields marked with (*) are mandatory. [Have a Query?](#)

Employer Details

No of Companies	Company Name*	Company PAN*	Company TAN*	From Date* (dd/mm/yyyy)	To Date* (dd/mm/yyyy)	
Company 1	ABC company	ASDFP1452T	WETR24563R	01/04/2017	16/09/2017	Delete

Salary Details

Company Name	Earnings (After Sec 10 Exemption) *	Professional Tax*	Taxable salary*	Provident Fund*	Vol. Provident Fund*	Income Tax Deducted in Prev Employer*
ABC company	457892.00	1500.00	74586.00	2500.00	0.00	4500.00
Total :	457892.00	1500.00	74586.00	2500.00	0.00	4500.00

Add New Row

Update Final taxable income after all exemptions and deductions.

Note : 1) Form 12B will be generated based on the data provided which has to be duly signed by the employee without which the same is not considered.

Number of supporting documents : 5

Previous

Save

Next

Key Points:

- The information must pertain from 1st April, 2017 to the Date of Leaving with the previous employer.
- Proofs to be submitted as per guidelines circulated

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Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

Section wise Data Entry

- Section A HRA
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- Section G Other Income

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Other Income

Other Income

Fields marked with (*) are mandatory.

[Have a Query?](#)

Income Details *	Income Received Date * (dd/mm/yyyy)	Amount *	
<input type="text" value="NSC Interest"/>	<input type="text"/>	2721.0	
<input type="text" value="Bank Interest (excluding interest on savings account)"/>	<input type="text" value="16/09/2017"/>	14500.00	<input type="button" value="Delete"/>
<input type="button" value="Add New Row"/>		Total :	17221.00

Note : 1) NSC Interest if any would also be considered under Other Income for Tax Purpose.

Number of supporting documents :

Key Points:

- NSC Interest will automatically be considered as Other Income.

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
- Section C Chapter VIA - Section 80C
- Section D Housing Loan
- Section E Previous Employer Details
- Section F Other Exemption
- Section G Other Income

IPSF Confirmation

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IPSF Confirmation Screen

Investment Proofs Submission Form 2017-2018

IPSF Confirmation Screen

Section A - Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

From Date	To Date	Rent per Month	Rent per Year	Location	Metro Flag	PAN of Landlord
01/04/2017	31/10/2017	8300.00	58100.00	BANGALORE	N	
01/11/2017	31/03/2018	8900.00	44500.00	BANGALORE	N	ABCPD1234Z

Section B - Rajiv Gandhi Equity Savings Scheme (80CCG)

Particulars	Amount
Medical Insurance Premium (U/s 80D)	17465.00
Medical Treatment/Handicapped Dependent (U/s 80DD)	125000.00
Interest on Educational Loan (U/s 80E)	135000.00
Permanent Physical Disability (80U)	75000.00
Medical Treatment of Specified Diseases (80DDB)	55000.00
Additional NPS Employee Contribution(80CCD1B)	25000.00
Rajiv Gandhi Equity Savings Scheme (80CCG)	25000.00
Section B - Total	457465.00

Section C - Chapter VIA - Section 80C

Particulars	Amount
Contribution to Pension Fund (80CCC)	50000.00
Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc	52500.00
Public Provident Fund (PPF)	150000.00
National Savings Certificate (NSC)	85000.00
Infrastructure Bonds	60000.00
Children Education Tuition fees	11000.00
Equity Linked Savings Scheme (ELSS)	30000.00
Mutual Funds	24000.00
Unit Linked Insurance Plan	48000.00
NPS Employee Contribution	25000.00
Sukanya Samridhi Scheme	150000.00
Fixed Deposit Scheme (Block Period of 5 yrs)	15000.00
Section C - Total	706500.00

Section D - Housing Loan

Particulars	Interest Amount	Principal Amount
Loss from House Property - SELF OCCUPIED	-30000.0	427590.00
Loss from House Property - LETOUT	-1144161.00	459932.00

Section E - Previous Employer Details

Name of Company	From Date	To Date	Previous Earnings	Provident Fund	Voluntary Provident Fund	Professional Tax	Previous Tax
ABC company	01/04/2016	31/05/2016	457892.00	2500.00	0.00	1500.00	4500.00

Section G - Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000)

Particulars	Amount
Bank Interest (excluding Interest on savings account)	15000.00
Section G - Total	15000.00

Payroll Deduction

Particulars	Amount
Provident Fund	11382.00
Payroll Deduction - Total	11382.00

All your inputs
get consolidated
into one

IPSF Confirmation Process

Investment Proofs Submission Form 2017-2018

IPSF Confirmation Screen

Section A - Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

From Date	To Date	Rent per Month	Rent per Year	Location	Metro Flag	PAN of Landlord
28/04/2017	31/03/2018	8500.00	94350.00	AMARAVATI	N	ABCPD1234Z

Section C - Chapter VIA - Section 80C

Particulars	Amount
Contribution to Pension	5000.00
Life Insurance Premium	10000.00
Mutual Funds (MF) (SEI)	36000.00
Section C - Total	51000.00

Section E - Provident

Name of Company	Professional Tax	Previous Tax
ABC Company	100.00	1500.00

2. Check the box if you wish to confirm

Particulars
Provident Fund
Payroll Deduction - Total

Amount
250493.00
250493.00

Message from webpage

Once the IPSF data is Confirmed, you will not be able to enter or modify IPSF data.

Do you want to Confirm now?

OK Cancel

1. Click OK to continue

☒ I hereby declare that I have read and understood the guidelines provided in 'Proofs Option Document' and that, all information/proofs provided above is true and correct in all respects. I also undertake to indemnify the company for any loss/ liability that may arise, in the event of any incorrect information provided by me.

3. Click here if you wish to save and view

Save and View

Confirm and Print

Re-print Report

Excelity Global
Proprietary & Confidential

4. Click here to Confirm and Print

Key Points:

- Confirm gets enabled only after the box is checked (Step 2)
- Once confirmed, the IPSF screens are non editable.
- The IPSF Report gets generated only after confirming the IPSF (Step 4).
- Save and View Option does not confirm the IPSF, hence, screens are editable

Note:

If you want to select additional Investment categories in any of the sections, go back to the "IPSF 2018-2019" link on the home page under the Year End tab. This must be done before confirming the IPSF.

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

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- Section G Other Income

IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure

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Printable IPSF



Unique
Barcode



PGBRK

IPSF|8871516|0088700420|1W11

IPSF ID : 0088700420

Investment Proofs Submission Form for the Year 2016-2017

Employee ID *	Shakthi. R	Gender *	F	Date of Joining	01/09/2016
Name *	Shakthi. R		No. of Children going to School *	0	
PAN *			No. of Children going to Hostel *	0	

Section A - Rent Paid for claiming HRA exemption (Only Original Rent Receipts will be considered)

From Date	To Date	Address	Rent Paid Per Month	Rent Paid Per Year	PAN of Landlord
01/09/2016	31/12/2016	No123, 1st Main, 4th Cross, Banashankar, Bangalore, BANGALORE, KARNATAKA	7550.00	30200.00	
01/01/2017	31/03/2017	No123, 1st Main, 4th Cross, Banashankar, Bangalore, BANGALORE, KARNATAKA	10000.00	30000.00	AFGPT1234J

As Per Last Declaration	Section B - Chapter VI A - Deductions from Total Income	Value of Proof Attached.
0	Medical Insurance Premium (U/s 80D)	12465.00
0	Medical Insurance Premium (U/s 80D) - Parents not being Senior Citizens	0.00
0	Medical Insurance Premium (U/s 80D) - Parents being Senior Citizens	5000.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%	0.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%	125000.00
0	Interest on Educational Loan (U/s 80E)	135000.00
0	Permanent Physical Disability (80U) < 80%	75000.00
0	Permanent Physical Disability Severe Disability (80U) > 80%	0.00
0	Medical Treatment of Specified Diseases (80DDB)	0.00
0	Additional NPS Employee Contribution (80CCD1B)	25000.00
0	Rajiv Gandhi Equity Savings Scheme (80CCG)	25000.00
Section C - Chapter VIA - Section 80C		
0	Contribution to Pension Fund (80CCC)	50000.00
0	Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc	52500.00
0	Public Provident Fund (PPF)	150000.00
0	National Savings Certificate (NSC)	85000.00
0	Infrastructure Bonds	60000.00
0	Children Education Tuition fees	11000.00
0	Equity Linked Savings Scheme (ELSS)	30000.00
0	Mutual Funds	24000.00
0	Unit Linked Insurance Plan	48000.00
0	5 Year Deposit under Senior Citizen Saving Scheme	0.00
0	Cumulative Term Deposits	0.00
0	NPS Employee Contribution	25000.00
0	Sukanya Samridhi Scheme	150000.00
0	5 Year Time Deposit in Post Office	0.00
0	Housing Loan - Principal Amount paid, Registration Fees, Stamp duty	767504.00
0	Fixed Deposit Scheme (Block Period of 5 yrs)	15000.00
0	NSC Interest (Will also be considered as Other Income)	0.00

	Section D(a) - Loss from House Property - LETOUT	
0	Loss from House Property - LETOUT	-780273.00
	Section D(b) - Loss from House Property - SELF OCCUPIED	
0	Loss from House Property - SELF OCCUPIED	-30000.00
	Section E - Previous Employer Details	
0	Salary paid by the Previous Employer	457892.00
0	Profession Tax deducted by the Previous Employer	1500.00
0	Income Tax deducted by the Previous Employer	4500.00
0	Voluntary Provident Fund deducted by the Previous Employer	0.00
0	Provident Fund deducted by the Previous Employer	2500.00
	Section G - Other Income	
0	Bank Interest (excluding interest on savings account)	15000.00
0	Dividend	0.00
0	Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000)	0.00
0	Pension	0.00
0	Others	0.00

Key Points:

- The Printable IPSF has a unique Barcode that identifies every individual, hence,
- Print the IPSF along with the Barcode.
- Do not staple/scratch/write on the Barcode
- Proofs submitted without the online IPSF (as covering) will not be accepted

Printable IPSF Contd...

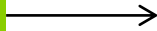
Declaration:

1. I hereby declare that I have read and understood the guidelines provided in 'Proofs Option Document' and that, all information, documents provided above is true and correct in all respects.
2. LTA exemption claimed by me(if applicable) is as per IT rule which specifies that exemption can be claimed twice in a block of 4 years. (irrespective of the number of employers in the block period)
3. I also undertake to indemnify the company for any loss/ liability that may arise, in the event of any incorrect information ,documents provided by me.

Date:

Place:

Signature
mandatory



Signature of Employee * _____

* Indicates mandatory fields as per our database. Please verify the same and if blank, please fill and submit the form.

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

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Forms & Annexure

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Computation of Income/ Loss from house property Let out.

COMPUTATION OF INCOME / LOSS FROM HOUSE PROPERTY - LETOUT (1)		
1. Name and Address of the Employee	Shakthi. R	
2. Permanent Account Number		
House Property U/s 24	Amount	Amount
(a) Housing Interest paid for 2016-2017 as per certificate		750296
(b) Rental Income / Notional rental income for the year 2016-2017	36000	
(c) Less: Municipal Tax Paid to the authorities	2000	
(d) Net Income from House Property (b - c)	34000	
(e) Less: Repairs and Renewals @30% on Net Income of Rs. 34000 (d * 30%)	10200	
(f) Net Actual Income to be set off (d - e)		23800
(g) Net value of Loss / Income for the year (a - f) 2016-2017	(726496.0)	
Note: If the Net Value exceeds interest paid for the year, then it would be treated as Income from House Property		
Place:		
Date:	Signature of the Employee	

Form 12 C

FORM NO. 12C

[See Rule 26B]

Form for sending particulars of income under section 192(2B) for the year ending 31/03/2017

1. Name and address of the employee 10435

2. Permanent Account No .

3. Residential status : ROR

4. Particulars of income under any head of income other than "salaries"
(not being a loss under any such head other than the loss under the head "Income from house property") received in the financial year - 2015-2016

(i) Income from house property (in case of loss, enclose computation thereof)	0.0
(ii) Profits and gains of business or profession	0.0
(iii) Capital gains	0.0
(iv) Income from other sources	
(a) Bank Interest (excluding interest on savings account)	14500.0

5. Aggregate of sub-items (i) to (iv) of item 4 Total Rs. 14500.00

.....
Signature of the Employee

Verification

I, Vikram Ghosh , do hereby declare that what is stated above is true to the best of my knowledge and belief.
Verified today, the day of.

Place

Previous Employer Details - Form 12 B

FORM NO. 12B

[See Rule 26A]

Form for furnishing details of income under section 192(2) for the year ending 31/03/2017

Name and address of the employee :

Permanent Account No. :

Residential status :

ROR

Serial Number	Name and address of Employer (s)	TAN of the Employer (s) as allotted by the ITO	Permanent Account Number of the Employer (s)	Period of Employment	Total amount of salary excluding amounts required to be shown in Col. 7 and Col. 8	Total amount of house rent allowance, conveyance allowance and other allowances to the extent chargeable to tax [See section 10 (13A) rule 2A and section 10 (14)]	Value of Perquisites and amount of accretion to employee's Provident Fund Account (give details in the annexure)	Total of col. 6, 7 and 8	Amount deducted in respect of life insurance premium, provident fund contribution etc. to which Sec. 80C applies (Give details)	Total amount of tax deducted during the year (enclose certificate issued under sec. 203)	Remarks
1	2	3	4	5	6	7	8	9	10	11	12
1	ABC company	WETR24563R	ASDFP1452T	153	NA	NA	NA	457892	2500	4500	Professional Tax Rs. 1500

Signature of the Employee

Verification

I, Shakthi. R , do hereby declare that what is stated above is true to the best of my knowledge and belief.

Verified today, the day of,

Place

Annexure

ANNEXURE

[See column 8 of Form No. 12B]

Particulars of value of perquisites and amount of accretion to employee's provident fund account

Name and address of the employee :

Permanent Account No. :

Period Year ending

31/03/2017

Name of Employee	TAN/PAN of the Employer	Where accommodation is unfurnished	Value as if accommodation is unfurnished	Cost of furniture (including television sets, radio sets, refrigerators and other household appliances and air conditioning plant or equipment) OR hire charges if hired from a third party	Perquisite value of furniture (10% of column 5) OR actual hire charges payable	Total of columns 4 and 6	Rent, if any paid by employee	Value of Perquisite (Col. 3 minus Col. 8) or (Col. 7 minus Col. 8) as applicable
1	2	3	4	5	6	7	8	9

Annexure Contd...

ANNEXURE

(Contd.)

Whether any conveyance has been provided by the employer free or at a concessional rate or where the employee is allowed the use of one or more motor cars owned or hired by the employer, estimated value of perquisite (give details) [See Rule 3 (c)]	Remuneration paid by employer for domestic and/or personal services provided to the employee (give details) [See rule 3(g)]	Value of free or concessional passages on home leave and other travelling to the extent chargeable to tax (give details)[See rule 2B read with section 10(5)(ii)]	Estimated value of any other benefit or amenity provided by the employer, free of cost or at concessional rate not included in the preceding columns (give details), e.g. supply of gas, electricity or estimated value of water for household (give details) consumption, free [See rule 3 (c)] educational facilities, transport for family, etc. [See rules 3(d), 3(e) and 3(f)]	Employer's contribution to recognised provident fund in excess of 10% of the employee's salary [See Schedule IV – Part A]	Interest credited to the assessee's account in recognised provident fund in excess of the rate fixed by the Central Government [See Schedule IV – Part A]	Total of columns 9 to 15 carried to column 8 of Form No. 12B
10	11	12	13	14	15	16

Key Points:

- The IPSF, Forms, Annexure, & supporting documents must be signed.

Annexure Contd...

Self declaration given for possession of Housing property(in the absence of Possession certificate) - Self Occupied

(Applicable if housing loan interest /principal deduction benefit is claimed u/s 24)

This is to declare that I Shakthi. R, have gained the ownership/ possession of my house property located at the following address, on 31/03/2016(DD/MM/YYYY).

Address:

No. 42, 2nd Cross, 4th Main road, Delhi

NEW DELHI, DELHI

Loan Lender/ Bank Name: HDFC

Loan Sanction Date : 15/08/2010

Date:

Signature

Note: Section 24(b) of the Act allows deduction from income from house property on interest on borrowed capital as under:-

(i) The deduction is allowed only in case of house property which is owned and in the occupation of the employee for his own residence. However, if it is not actually occupied by the employee in view of his place of the employment being at other place, his residence in that other place should not be in a building belonging to him.

(ii) The house so acquired or constructed should be completed within 3 years from the end of the FY in which the capital was borrowed. Hence it is necessary for the DDO to have the completion certificate of the house property against which deduction is claimed either from the builder or through self-declaration from the employee.

Annexure Contd...

Self declaration given for possession of Housing property(in the absence of Possession certificate) - Letout (1)

(Applicable if housing loan interest /principal deduction benefit is claimed u/s 24)

This is to declare that I Shakthi. R, have gained the ownership/ possession of my house property located at the following address, on 16/08/2016(DD/MM/YYYY).

Address:

New Delhi

New Delhi, DELHI

Loan Lender/ Bank Name: HDFC

Loan Sanction Date : 24/08/2016

Date:

Signature

Note: Section 24(b) of the Act allows deduction from income from house property on interest on borrowed capital as under:-

(i) The deduction is allowed only in case of house property which is owned and in the occupation of the employee for his own residence. However, if it is not actually occupied by the employee in view of his place of the employment being at other place, his residence in that other place should not be in a building belonging to him.

(ii) The house so acquired or constructed should be completed within 3 years from the end of the FY in which the capital was borrowed. Hence it is necessary for the DDO to have the completion certificate of the house property against which deduction is claimed either from the builder or through self-declaration from the employee.

Annexure Contd...

FORM NO.128B
(See rule 26C)

Statement showing particulars of claims by an employee for deduction of tax under section 192

1. Name and address of the employee
2. Permanent Account Number of the employee .
3. Financial year 2017-2018

Details of claims and evidence thereof			
Sl. No.	Nature of claim	Amount(Rs.)	Evidence / particulars
1	2	3	4
1	House Rent Allowance (i) Rent paid to the landlord : Rs.102600 (ii) Name of the landlord Rangan Rangan (iii) Address of the landlord No 123, JC Road, Vellure No 123, JC Road, Vellure (iv) Permanent Account Number of the landlord ABCPD1234Z	Rs.102600	House Rent Receipts
2	Leave travel concessions or assistance	Rs.0	Travel Receipts/Tickets
3	Deduction of interest on borrowing: (i)Interest payable/paid to the lender (ii) Name of the lender (iii) Address of the lender (iv)Permanent Account Number of the lender (a) Financial Institutions (b) Employer (c) Others	Rs.0.0	Provisional Certificate from Bank/Financial Institution/Lender

Annexure Contd...

4	<p>Deduction under Chapter VI-A</p> <p>(A) Section 80C, 80CCC and 80CCD</p> <p>(i) Section 80C</p> <p>(a) Provident Fund : Rs.31732</p> <p>(b) Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc : Rs.1000</p> <p>(c) Unit Linked Insurance Plan : Rs.5000</p> <p>(d) National Savings Certificate (NSC) : Rs.25000</p> <p>(ii) Section 80CCC :</p> <p>(iii) Section 80CCD :</p> <p>(B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.</p> <p>(a) Interest on Educational Loan (U/s 80E) : Rs.125000</p> <p>(b) Rajiv Gandhi Equity Savings Scheme (80CCG) : Rs.0</p> <p>(c) Permanent Physical Disability (80U) : Rs.75000</p>	Rs. 262732.0	Photocopy of the investment proofs
Verification			
I, VINUTHA , son/daughter of , do hereby certify that the information given above is complete and correct			
Place : BANGALORE			
Date :			
Designation : Bill of Quotations Sr team leader			(Signature of the employee) Full Name: VINUTHA

Note: The information/details above, as required for deduction of tax u/s 192 of the Income Tax Act, has been entered by the employee through an authorized login on the portal. The information submitted above is deemed to be e-signed by the employee.

Annexure Contd...

Payroll Deduction	
Particulars	Amount
Provident Fund	21600.00
Payroll Deduction - Total	21600.00

Key Points:

- Any deduction through Payslip like PF, VPF and Medical Insurance etc., will be considered directly for Income Tax benefits and no need of submitting the proof for this.

Content Tracker

Locating the IPSF 2018-2019 Link

Section(s)/Item(s) Selection & Master Information

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
- Section C Chapter VIA - Section 80C
- Section D Housing Loan
- Section E Previous Employer Details
- Section G Other Income

IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure



Scan Image Upload

Scan Image Upload

- Please scan the signed copy of IPSF and other annexures (as applicable).
- Save all scanned images/soft copies in one folder
- Check for all the relevant proofs are scanned/ soft copies are saved.
- Zip the folder.
- Name the zip file without any space eg:
Correct- “EMPIDIPSF201718.zip”.
Incorrect- “EMPID IPSF 2017 18.zip”
- Open the zipped folder and ensure all the documents are saved /can open from the zipped folder.
- Log on the link Year End>>Upload IPSF Proof Images.
- Please go through the following slides to upload the zipped file.

III WorkWays Page 1

Print

PSF1719244504873915045101

All the proofs have to be uploaded using the scan image option using the link "Upload IPSF Proof Images". Any proofs that are uploaded in the IPSF upload box will not be accepted. Please ensure to upload all the images of your investment proofs upon the duly signed IPSF form. In absence of any, create a PDF file to upload.

Investment Proofs Submission Form for the Year 2017-2018				
Employee ID *	SSN *	First Name *	Last Name *	Phone No *
123456789	123456789	John	Doe	1234567890
DOB *	Address *	No. of Children going to School *	No. of Children going to Work *	
12/31/1980	1234567890	0	0	
Section A - Fund Proof for claiming total exemption (Only On your last receipt will be considered)				
Fund Name	To Date	Address	Bank Proof Per Month	Bank Proof Per Year
ABCDEF	12/31/2017	1234567890	1234567890	1234567890
All Per Last Declaration				Value of Proof Attached
1) Medical Insurance Premium (12/31/2017)				0.00
2) Medical Insurance Premium (12/31/2017) - Parents not using Senior Citizens				0.00
3) Medical Insurance Premium (12/31/2017) - Parents using Senior Citizens				0.00
4) Medical Excess/Unreimbursed Dependents (12/31/2017) < 80%				0.00
5) Medical Excess/Unreimbursed Dependents (12/31/2017) > 80%				0.00
6) Interest on Educational Loan (12/31/2017)				0.00
7) Personal Physical Disability (12/31/2017)				0.00
8) Personal Physical Disability (12/31/2017) > 80%				0.00
9) Personal Physical Disability (12/31/2017) > 80%				0.00
10) Health Savings Account (12/31/2017)				0.00
Section B - Chapter 10A - Exemptions from Total Exemption				
1) Contributions to Foreign Funds (12/31/2017)				0.00
2) Life Insurance Premium (Senior Status, Senior Status)				123456.78
3) Public Pension Fund (12/31/2017)				123456.78
4) National Savings Certificate (12/31/2017)				0.00
5) State or Educational Tuition Fee				123456.78
6) Family Credit Savings Scheme (12/31/2017)				0.00
7) Mutual Funds				0.00
8) Life Insurance Premium (12/31/2017)				0.00
9) Life Insurance Premium (12/31/2017)				0.00
10) Life Insurance Premium (12/31/2017)				0.00
11) Life Insurance Premium (12/31/2017)				0.00
12) Life Insurance Premium (12/31/2017)				0.00
13) Life Insurance Premium (12/31/2017)				0.00
14) Life Insurance Premium (12/31/2017)				0.00
15) Life Insurance Premium (12/31/2017)				0.00
16) Life Insurance Premium (12/31/2017)				0.00
17) Life Insurance Premium (12/31/2017)				0.00
18) Life Insurance Premium (12/31/2017)				0.00
19) Life Insurance Premium (12/31/2017)				0.00
20) Life Insurance Premium (12/31/2017)				0.00
21) Life Insurance Premium (12/31/2017)				0.00
22) Life Insurance Premium (12/31/2017)				0.00
23) Life Insurance Premium (12/31/2017)				0.00
24) Life Insurance Premium (12/31/2017)				0.00
25) Life Insurance Premium (12/31/2017)				0.00
26) Life Insurance Premium (12/31/2017)				0.00
27) Life Insurance Premium (12/31/2017)				0.00
28) Life Insurance Premium (12/31/2017)				0.00
29) Life Insurance Premium (12/31/2017)				0.00
30) Life Insurance Premium (12/31/2017)				0.00
31) Life Insurance Premium (12/31/2017)				0.00
32) Life Insurance Premium (12/31/2017)				0.00
33) Life Insurance Premium (12/31/2017)				0.00
34) Life Insurance Premium (12/31/2017)				0.00
35) Life Insurance Premium (12/31/2017)				0.00
36) Life Insurance Premium (12/31/2017)				0.00
37) Life Insurance Premium (12/31/2017)				0.00
38) Life Insurance Premium (12/31/2017)				0.00
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46) Life Insurance Premium (12/31/2017)				0.00
47) Life Insurance Premium (12/31/2017)				0.00
48) Life Insurance Premium (12/31/2017)				0.00
49) Life Insurance Premium (12/31/2017)				0.00
50) Life Insurance Premium (12/31/2017)				0.00
51) Life Insurance Premium (12/31/2017)				0.00
52) Life Insurance Premium (12/31/2017)				0.00
53) Life Insurance Premium (12/31/2017)				0.00
54) Life Insurance Premium (12/31/2017)				0.00
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56) Life Insurance Premium (12/31/2017)				0.00
57) Life Insurance Premium (12/31/2017)				0.00
58) Life Insurance Premium (12/31/2017)				0.00
59) Life Insurance Premium (12/31/2017)				0.00
60) Life Insurance Premium (12/31/2017)				0.00
61) Life Insurance Premium (12/31/2017)				0.00
62) Life Insurance Premium (12/31/2017)				0.00
63) Life Insurance Premium (12/31/2017)				0.00
64) Life Insurance Premium (12/31/2017)				0.00
65) Life Insurance Premium (12/31/2017)				0.00
66) Life Insurance Premium (12/31/2017)				0.00
67) Life Insurance Premium (12/31/2017)				0.00
68) Life Insurance Premium (12/31/2017)				0.00
69) Life Insurance Premium (12/31/2017)				0.00
70) Life Insurance Premium (12/31/2017)				0.00
71) Life Insurance Premium (12/31/2017)				0.00
72) Life Insurance Premium (12/31/2017)				0.00
73) Life Insurance Premium (12/31/2017)				0.00
74) Life Insurance Premium (12/31/2017)				0.00
75) Life Insurance Premium (12/31/2017)				0.00
76) Life Insurance Premium (12/31/2017)				0.00
77) Life Insurance Premium (12/31/2017)				0.00
78) Life Insurance Premium (12/31/2017)				0.00
79) Life Insurance Premium (12/31/2017)				0.00
80) Life Insurance Premium (12/31/2017)				0.00
81) Life Insurance Premium (12/31/2017)				0.00
82) Life Insurance Premium (12/31/2017)				0.00
83) Life Insurance Premium (12/31/2017)				0.00
84) Life Insurance Premium (12/31/2017)				0.00
85) Life Insurance Premium (12/31/2017)				0.00
86) Life Insurance Premium (12/31/2017)				0.00
87) Life Insurance Premium (12/31/2017)				0.00
88) Life Insurance Premium (12/31/2017)				0.00
89) Life Insurance Premium (12/31/2017)				0.00
90) Life Insurance Premium (12/31/2017)				0.00
91) Life Insurance Premium (12/31/2017)				0.00
92) Life Insurance Premium (12/31/2017)				0.00
93) Life Insurance Premium (12/31/2017)				0.00
94) Life Insurance Premium (12/31/2017)				0.00
95) Life Insurance Premium (12/31/2017)				0.00
96) Life Insurance Premium (12/31/2017)				0.00
97) Life Insurance Premium (12/31/2017)				0.00
98) Life Insurance Premium (12/31/2017)				0.00
99) Life Insurance Premium (12/31/2017)				0.00
100) Life Insurance Premium (12/31/2017)				0.00

Declaration
I, the undersigned, do hereby declare that I have read and understood the guidelines provided in the form and that all the information provided above is true and correct in all respects.
I also undertake to indemnify the company for any loss or liability that may arise, in the event of any incorrect information provided by me.

Signature

Date

Signature of Employee *

* Includes declaration fields on all our declarations. Please verify the name and if blank, please fill it and submit the form.

Scan Image Upload

Image Upload

The Image Upload module helps the user to upload the scanned images of the IPSF proofs online. To access this module navigate to **Year End >>> Upload IPSF Proof Images**

▼ Year End

+ IPSF 2017-18

Upload IPSF Proof Images

IPSF Proofs

This module is used for uploading scanned images of IPSF proofs

Employee ID Employee Name Year Code 2018-2019

Image Upload - IPSF Proofs

IPSF ID * - Select any one -

Upload File * - Select any one - Browse...

0072200044

Save

Note :
Please ensure that, all the documents have to be uploaded at the same time.

If the IPSF Id does not appear in the drop down, it means,

1. The IPSF has not been confirmed, OR
2. The proofs have already been uploaded.

Fields marked with (*) are mandatory.

- Select the appropriate IPSF Id from the dropdown (which is confirmed for the current year)
- Select the .zip file containing all the bills and proofs

Scan Image Upload Contd...

Criteria for submission of IPSF proofs:

1. Only .zip files can be uploaded.

If the user attempts to upload any other file format the system throws an error message

The screenshot shows a web form titled "Image Upload - IPSF Proofs". At the top, there are input fields for "Employee ID", "Employee Name", and "Year Code" (set to "2018-2019"). Below these is a section for "IPSF ID *" with a dropdown menu and an "Upload File *" button. A "Note" section provides instructions: "Please ensure that, all the documents have to be uploaded at the same time. If the IPSF Id does not appear in the drop down, it means, 1. The IPSF has not been confirmed, OR 2. The proofs have already been uploaded." A "Fields marked with (*) are mandatory." note is at the bottom. A "Microsoft Internet Explorer" error dialog box is overlaid on the form, stating: "Only ZIP files should be uploaded." with an "OK" button.

2. The format of the proofs (scanned images) should be either tiff, pdf, bmp, png, jpg only. Any attempt to upload files of any other formats will result in an error.

The screenshot shows the same "Image Upload - IPSF Proofs" form. The "Year Code" is still "2018-2019". A red error message is displayed: "One or more entries in the uploaded ZIP file is/are not in supported format. It supports only pdf,tiff,jpg,bmp formats". The "IPSF ID *" dropdown is set to "- Select any one -". The "Upload File *" button is present. The "Note" section and "Fields marked with (*) are mandatory." note are also visible. A "Save" button is located below the "Upload File *" button.

Scan Image Upload Contd...

3. The size of the .zip file containing the proofs should not exceed **20 MB**. Any attempt to upload files larger than 20 MB will result in an error.

Employee ID	Employee Name	Year Code	2018-2019
File Transfer has failed, because File Size exceeds its max size(20 MB)			
Image Upload - IPSF Proofs			
IPSF ID *	- Select any one -		
Upload File *	<input type="text"/>		<input type="button" value="Browse..."/>
<input type="button" value="Save"/>			
Note : Please ensure that, all the documents have to be uploaded at the same time. If the IPSF Id does not appear in the drop down, it means, 1. The IPSF has not been confirmed, OR 2. The proofs have already been uploaded.			
Fields marked with (*) are mandatory.			

Once the file is successfully uploaded, the following screen with a success message is displayed.

Employee ID	Employee Name	Year Code	2018-2019
The file has been successfully uploaded.			
Image Upload - IPSF Proofs			
IPSF ID *	- Select any one -		
Upload File *	<input type="text"/>		<input type="button" value="Browse..."/>
<input type="button" value="Save"/>			
Note : Please ensure that, all the documents have to be uploaded at the same time. If the IPSF Id does not appear in the drop down, it means, 1. The IPSF has not been confirmed, OR 2. The proofs have already been uploaded.			
Fields marked with (*) are mandatory.			

Upon successful upload, you'll receive the following notification through an auto generated mail.

Subject: IPSF Scan Upload Success

Dear Employee,

Please be informed that your scan image upload towards Investment Proof Submission Form (IPSF), is done successfully on our portal. This is only a confirmation to your activity of scan image upload being done. Approval of proofs is subject to validation of documents.

Thanks in advance.

Scan Image Upload Contd...

If the user attempts to upload a file after a successful upload, the system throws an error message as shown below

Employee ID		Employee Name		Year Code	2018-2019
File Transfer has failed. because You have already uploaded the zip file for the ID					
Image Upload - IPSF Proofs					
IPSF ID *	- Select any one -				
Upload File *	<input type="text"/>				<input type="button" value="Browse..."/>
<input type="button" value="Save"/>					
Note : Please ensure that, all the documents have to be uploaded at the same time. If the IPSF Id does not appear in the drop down, it means, 1. The IPSF has not been confirmed, OR 2. The proofs have already been uploaded.					
Fields marked with (*) are mandatory.					

Upon upload failure, you'll receive the following notification through an auto generated mail.

Subject: IPSF Scan Upload Failed

Dear Employee,

Please be informed that the scan images uploaded by you towards Investment Proof Submission Form (IPSF), has failed due to error in transition/ corrupted images. You are requested to upload all the IPSF scan images once again on to HRWorkways portal within 1 working day from the day this communication is received. Please create a new ZIP file during the re-upload.

You will receive an email confirmation upon successful re-upload of IPSF images.

Thanks in advance.

Only one consolidated file (Including all your proofs) can be uploaded. Once uploaded the system is locked. No further uploads are allowed

Scan Image Upload Contd...

Do's And Don'ts		
SL No	Do's	Don'ts
1	The files to be uploaded should be a valid .zip file	Do not upload files without zipping it
2	The .zip file size should be less than 20 MB	Do not upload a .zip file which exceeds 20MB in size
3	Consolidate all the scanned files into a single .zip file before uploading it	Do not try to upload a corrupted file
4	The file format of scanned files should only be any of these : .tif/.pdf/.jpg/.bmp	Do not upload a .zip file which consists of files with format any other than one accepted
5	All the scanned files in the .zip file should be in Black and White	Do not protect files with passwords
6	Make sure that .thumb.db is not included in zip folder	Do not upload any document which has digital signature instead, take a printout, scan and upload

Key Messages

- Upload **ALL** the proofs / annexure as applicable (as per the guidelines) to the IPSF form.
- Enclose the proofs in order of the IPSF data filled (section-wise).
- Annexure such as Form 12C, Form 12B, etc., should be aligned to the respective proofs.
- Sign the IPSF and all the proofs before uploading.
- Signed Form 12BB should be uploaded with IPSF and all other proofs
- Multiple submission of claims will not be considered.

Note: Proofs submitted beyond the cut-off date / not in line with the guidelines will not be accounted for income tax calculations

Thank you