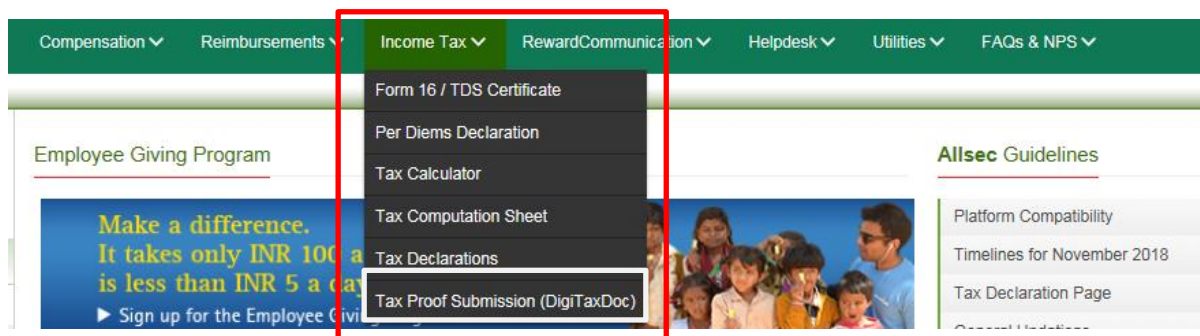# DigiTaxDoc Playbook
(Online Proof Submission)
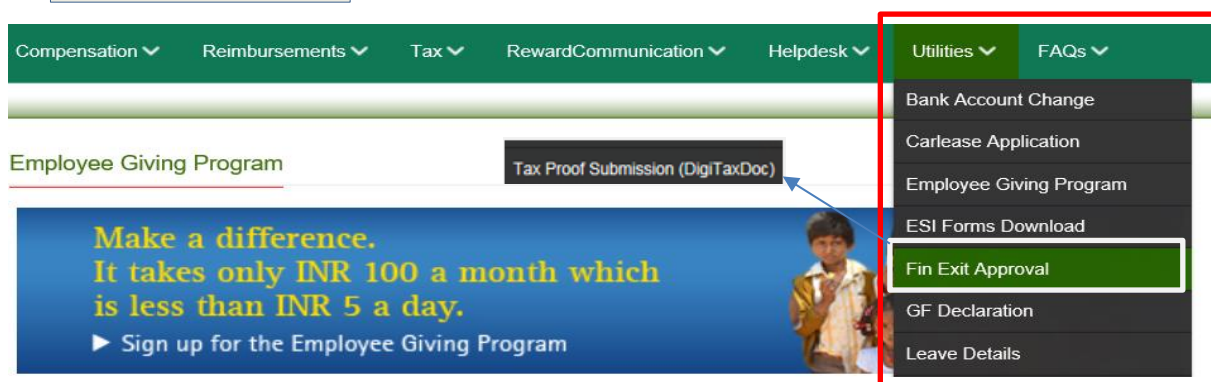
"Online Tax Proof Submission (DigiTaxDoc) Module on Allsec login."

1. **Login to Allsec** Allsec Smartpay

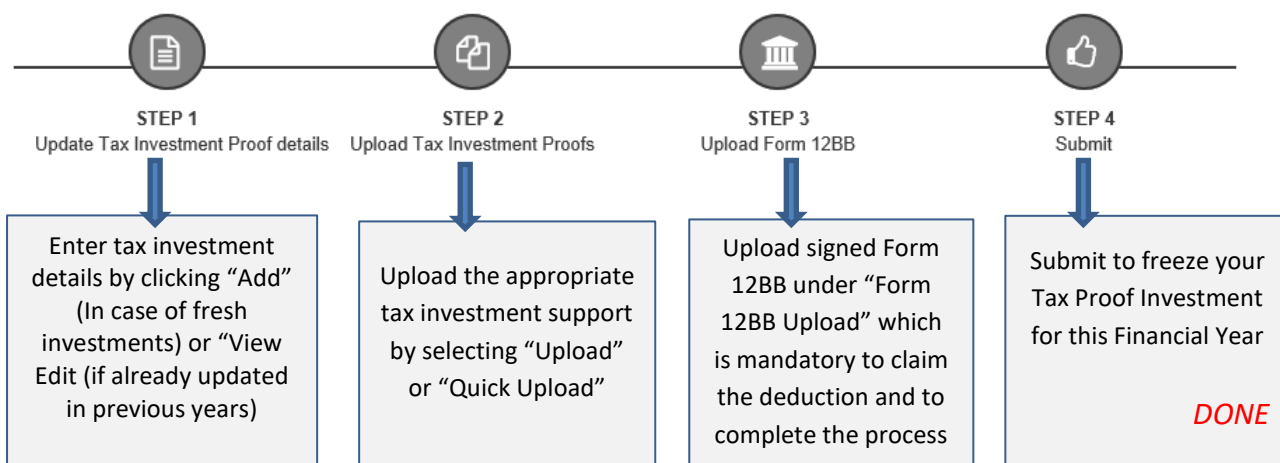➡ 1a. **Active Employees**   "Tax" Menu and then "Tax Proof Submission (DigiTaxDoc)"

➡ 1b. **Resigned Employees**   "Utilities" Menu" and then "Fin Exit Approval" (Select "Tax Proof Submission")

2. MANDATORY STEPS

STEP 1 Update Tax Investment Proof details	STEP 2 Upload Tax Investment Proofs	STEP 3 Upload Form 12BB	STEP 4 Submit
Enter tax investment details by clicking "Add" (In case of fresh investments) or "View Edit (if already updated in previous years)	Upload the appropriate tax investment support by selecting "Upload" or "Quick Upload"	Upload signed Form 12BB under "Form 12BB Upload" which is mandatory to claim the deduction and to complete the process	Submit to freeze your Tax Proof Investment for this Financial Year *DONE*

- 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 signed future declaration form.**

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 will 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'19 and estimated projected value from Dec'19 to Mar'20 is displayed in "PF details" button.

PF details

Description	Amount
PF/VPF deposited during Apr-2019 to Nov-2019	80000
Estimated PF/VPF to be deposited during Dec-2019 to Mar-2020	40000
Estimated PF/VPF Contribution during Apr-2019 to Mar-2020	120000
Maximum Deduction allowed under section 80C of Income Tax Act 1961*	150000
Estimated tax investment proof to be submitted	30000

Important Notes :
1. The details shown above are the estimated value and will increase / decrease.
2. This details will be helpful to you to know your estimated Providend 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 Samriddhi Account Scheme, Tution Fee, Unit Linked Insurance Plan.

2a2.   Rent Details Updation

Screen1 / Rent Details Updation

Screen2 / Rent Details Updation

Screen3 / Rent Details Updation

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 / Updations of Investment Proofs

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
☐	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

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.

2b2. Updation 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
☐	Life Insurance Premium	Section 80C	19,000.00	0.00	+	✐	

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

Life Insurance Premium for FY 19-20

[Add Additional Line Item +]   [GuideLines 🖺]   [Save 🖿] [Back ‹]

■ Line Item 1   +

Name of the Insurance Company

Premium Amt

Amount Paid on or after 1st Apr 18(Amt)

Policy No.

Frequency
[Select ⌄]

Amount Payable on or before 31st Mar 19 (Amt)

Date of Commencement (dd/mm/yyyy)

Number of Installment Paid on or after 1st Apr 18 (Count)

Total Amount FY 18-19 (Paid Amt+Payable Amt)

Sum Assured

Number of Installment Payable on or before 31st Mar 19 (Count)

Relationship
[Select ⌄]

[Save 🖿]   Mandatory fields to be filled & the same are in line with Income Tax Act

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

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

[View Proof for Selected ☰]	[Edit Selected ✎]	[Delete Selected 🗑]	[GuideLines 🗑]	Complete record can be deleted

☐	Name of the Insuran...	...te of Commencement (dd/mm/yyyy)	Sum Ass...		...unt
☐	LIC of India example	...7/10/2017	100000	1000	1000

Record can be modified in any manner

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

DigiTaxDoc Playbook
(Online Proof Submission)

Normal Upload

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

Browse...

Upload

Please read all self-explanatory alerts to ensure accuracy

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

Close

STEP 4
Submit

1.
2.   xlsx,.xps..
3. **Form12BB should not be uploaded here.It should be uploaded under "Form12BB upload".**

Quick Upload

Ensure that relevant proofs to be uploaded under the respective investment line item.

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

Last modified on :

View Proof for Selected

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
Rent	Section 10(13A)	0.00	5,000.00			

The process of upload is same for all investments.

Screen3 / Proofs Upload – Upload all Proofs at a stretch "Quick Upload"

% TAX INDEX	🗐 DOCUMENT LIBRARY	ℹ REJECTION CODE LIBRARY	? FAQ'S	⬇ DOWNLOAD FORM 12 BB	⬆ VIEW UPLOADED FILES

After filling all investment details with Proof amount being mandatory, employee can upload all proof at a time

STEP 3
Upload Form 12 BB

STEP 4
Submit

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

Form12BB Upload 🏛   Quick Upload ⬆

Quick Upload

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

☐ Life Insurance Premium   ☐ RENT   ☐ 80EE – Additional Deduction on Home Loan Interest

Here you can upload individual type of proofs or all proofs by selecting checkbox(es). After selecting proof docs, click on upload Icon below browser icon

1. M
2. Fi
3. F   2BB upload".

Close

STEP 4
Submit

Update Tax investment proof details   Upload the tax investment supporting   Upload Form 12 BB

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

Form12BB Upload 🏛   Quick Upload ⬆

Screen4 / Proofs Upload – Upload all Proofs at a stretch "Quick Upload" (Contd….)

Select the appropriate components to upload

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

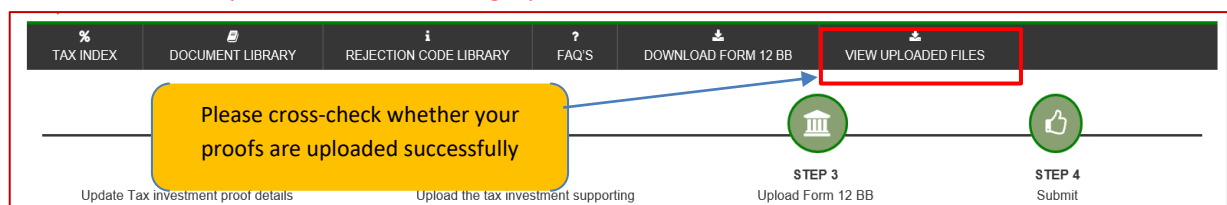☑ Life Insurance Premium ☐ RENT ☐ 80EE – Additional Deduction on Home Loan Interest
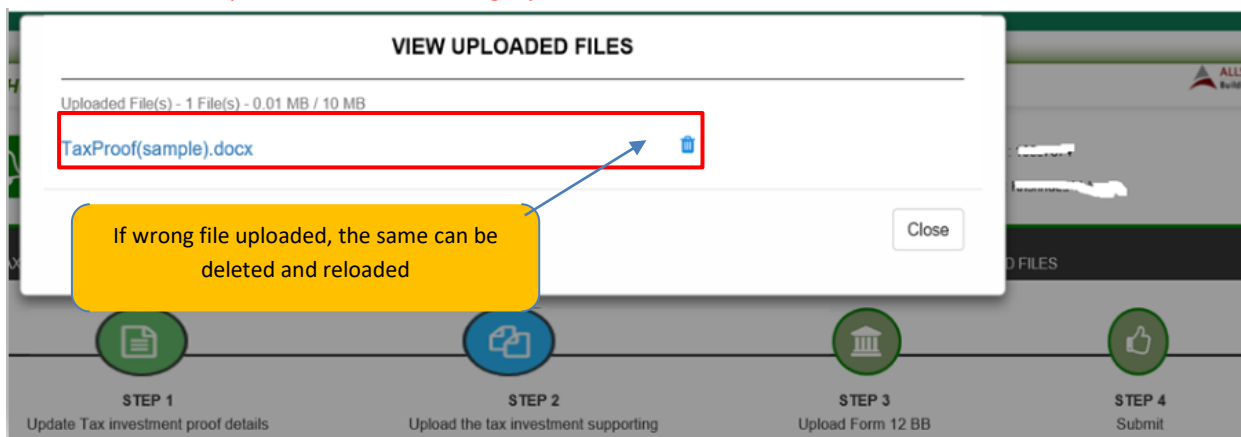
Browse...

Remove TaxProof(sample).docx

Upload

Close

Screen5 / Proofs Upload – Cross-checking Uploaded Files

% TAX INDEX	📖 DOCUMENT LIBRARY	ℹ REJECTION CODE LIBRARY	? FAQ'S	⬇ DOWNLOAD FORM 12 BB	⬇ VIEW UPLOADED FILES

Please cross-check whether your proofs are uploaded successfully

STEP 3
Upload Form 12 BB

STEP 4
Submit

Update Tax investment proof details · Upload the tax investment supporting

Screen6 / Proofs Upload – Cross-checking Uploaded Files

VIEW UPLOADED FILES

Uploaded File(s) - 1 File(s) - 0.01 MB / 10 MB

TaxProof(sample).docx 🗑

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

Close

STEP 1
Update Tax investment proof details

STEP 2
Upload the tax investment supporting

STEP 3
Upload Form 12 BB

STEP 4
Submit

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

Screen1 / Form 12BB Formalities – Downloading Form 12BB

% TAX INDEX	📖 DOCUMENT LIBRARY	ℹ REJECTION CODE LIBRARY	? FAQ'S	⬇ DOWNLOAD FORM 12 BB	⬇ VIEW UPLOADED FILES

Please note that this Form is mandated as per Income Tax Act

STEP 3
Upload Form 12 BB

STEP 4
Submit

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

> ***Not to be done on Tool. Downloaded Form to be signed on all pages, scan / clear mobile photo and upload in the tool (see the screen 2 below)***

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

Screen2 / Uploading of signed Form 12BB

Form12 BB(Signed) Upload

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...

Remove Signed Form12BB sample.pdf

Upload

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

Close

Form12BB Upload

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.