

Online Investment Proof Submission Form (IPSF) Walkthrough 2019-2020

Contents

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- 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

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IPSF 2019-2020 Link

▶ **My Personal Details**

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➔ IPSF Approval Report

➔ **IPSF 2019-2020**

Hi

Welcome to ESS - your personal space of Payroll details!! We hope you will find the information useful and navigation can be sent to info@excelityglobal.com.

What would you like to do today?

➤ **Claim Reimbursements**

Click here

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Section & Item Selection

Section A - HRA
<input checked="" type="checkbox"/> Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

Section B - Chapter VI A - Deductions from Total Income
<input checked="" type="checkbox"/> Medical Insurance Premium (U/s 80D)
<input checked="" type="checkbox"/> Medical Treatment/Handicapped Dependent (U/s 80DD)
<input checked="" type="checkbox"/> Interest on Educational Loan (U/s 80E)
<input checked="" type="checkbox"/> Permanent Physical Disability (U/s 80U)
<input checked="" type="checkbox"/> Medical Treatment of Specified Diseases (U/s 80DDB)
<input checked="" type="checkbox"/> Additional NPS Employee Contribution(U/s 80CCD1B)
<input checked="" type="checkbox"/> Electric Vehicle Loan Interest Benefit (U/s 80EEB)

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

Section D - Housing Loan
<input type="checkbox"/> Loss from House Property - SELF OCCUPIED
<input checked="" type="checkbox"/> Loss from House Property - LETOUT

Section E - Previous Employer Details
<input checked="" type="checkbox"/> Previous Employer Details

Section G - Other Income
<input checked="" type="checkbox"/> 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)

☒ Medical Treatment of Specified Disease

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

☒ Electric Vehicle Loan Interest Benefit (U/s 80EEA)

Section C - Chapter VI A - Section 80C

☒ Contribution to Pension Fund (80CCC)

☒ Life Insurance Premium (Jeevan Dhara, Jeevan Akshaya, 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)

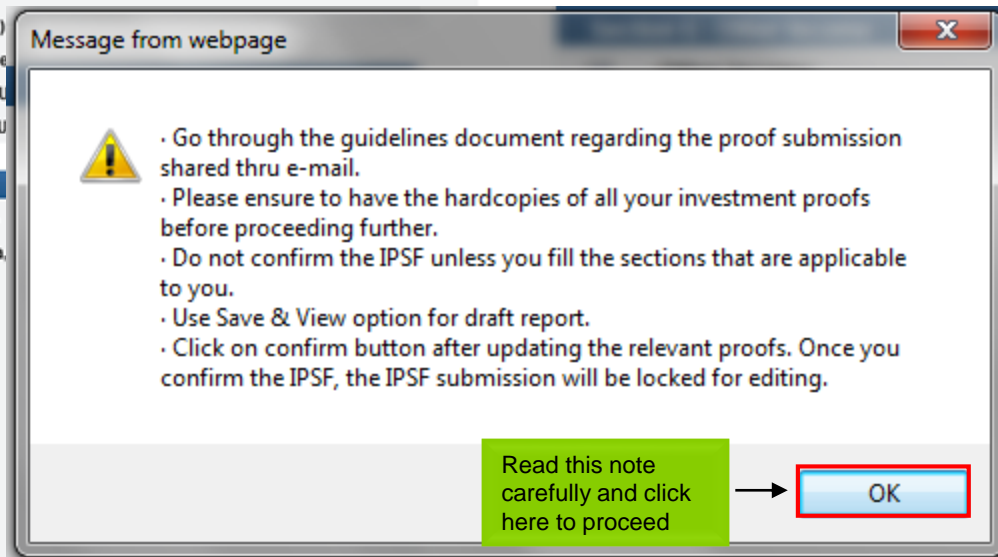
Section D - Housing Loan

☐ Loss from House Property - SELF OCCUPIED

☒ Loss from House Property - LETOUT

Section E - Previous Employer Details

☒ Previous Employer Details



m 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.



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

Add New Row

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

Previous

Save

Next

Click here to understand the requirement of the relevant section

Click here to delete rows (Except Self)

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 \(SEC80U\)](#)
- [Medical Treatment for Specific Disease \(SEC80DDDB\)](#)
- [Additional NPS Employee Contribution](#)
- [Electric Vehicle Loan Interest Benefit \(SEC80EEB\)](#)
- [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 - Letout \(SEC24\)](#)
- [Previous Employer Details](#)
- [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 2019-2020"** 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

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

Previous Save Next

Father name is mandatory in Form 12BB. Please update the Father name, if the info is not available in Dependent Details. However, Father Name will be considered from the Employee Master info, if it is not updated in the IPSF Dependant Details' screen.

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

Agenda Tracker

Locating the IPSF 2019-2020 Link

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

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HRA- Rent Payment Details

Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered) → Only Original rent receipts are valid proofs

Fields marked with (*) are mandatory.

Property Id	From Date * (dd/mm/yyyy)	To Date * (dd/mm/yyyy)	Rent Per Month *	Period Rent	Address *	State *	Other City	Metro
1	01/04/2019	31/03/2020	18000.00	216000.00	GR Nagar, 8th Cross, 8th Phase	KARNATAKA	SHIMOGA	N

To comply with top 10 OWASP vulnerabilities following special characters are not allowed !@#%&*()+=[]\';<>?

Add New Row Delete Last Row

Land Lord Details

Multiple Owners for Rented Property: Yes

Property Id: 1

Multiple Owners for Rented Property: Yes

Select Multiple Landlords Yes or No

Landlord Name: Vadiraj

Landlord PAN: ABCPD1234E

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

Landlord Address: GR Nagar, 8th Cross, 8th Phase

Rent Per Month: 10000.00

Landlord PAN: PANNOTAVBL

Landlord Address: GR Nagar, 8th Cross, 8th Phase

Rent Per Month: 8000.00

Add Row Delete Row

Note : 1) HRA Exemption u/s 10 (for the rent paid by the employee), is allowed only when the "House" is owned by the employee
2) If there is no change in rent for the year, and address, please include only one entry with the "House" owned by the employee

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

Number of supporting documents : 8

Previous Save Next

Key Points:

- From & To Date must be within 1st April, 2019 to 31st March, 2020
- If you have joined the organization after 1st April, 2019, then your DOJ becomes the 'From Date'
- Delhi, Mumbai, Chennai, & Kolkata are 'Metro' cities

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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 Premium	12345	15/05/2019	Paid	Rajesh L Rao	Self	47	35000.00	Cheque	456789	Delete
Preventive Medical Check	1789	15/08/2019	Paid	Shilpa V Rao	Spouse	44	5000.00	Cash		Delete
Medical Expenditure with Insurance	34565	13/08/2019	Paid	Laxmi Mairpady Rao	Mother	69	30000.00	Cheque	123456	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.50000 in case of parents above 60 years (Senior citizens).

Number of supporting documents : 3

Previous

Save

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Dependent 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.
- Medical expenditure incurred by an assessee on the health of a senior citizen aged 60 years and above can be claimed under the Expense Type "Medical Expenditure with No Insurance (Sr. Citizen)" provided that, no amount has been paid to effect or to keep in force an insurance on the health.

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 *	
Sundaram ▼	Father	More than or equal to 40% and Less than 8 ▼	75000.00	Delete

Add New Row

- Note :**
- 1) Form 10-IA duely signed by a Government certified Medical Practitioner should be attached without which the benifit under this section will not be considered. [Download](#)
 - 2) No benefit, if the disability is less than 40%.
 - 3) Limited to Rs. 75000/-, if the disability is more than or equal to 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 Start Date (dd/MM/yyyy) *	Name *	Relationship	Interest Amount *	
01/04/2012	Rajesh L Rao ▼	Self	400000.00	Delete

Add New Row

Number of supporting documents :

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 Assessee	Relationship	Percentage*	Amount	
PRABA SUNDARAM	Self	More than or equal to 80% ▼	125000.00	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 40% .
 - 3) Limited to Rs. 75000/-, if the disability is equal to or 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

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Key Points:

- Benefit under this section can be claimed for Self only

Electric Vehicle Loan Interest Benefit (U/s 80EEB)

Electric Vehicle Loan Interest Benefit (U/s 80EEB)

Fields marked with (*) are mandatory.

Have a Query?

Sl No.	Loan Lender/Bank Name*	Address of the Lender*	State of the Lender*	City of the Lender*	Loan Sanction Date*	Whether it is the first electric vehicle?*	Vehicle Type*	Vehicle Number*	Interest*	PAN*
1	IOCI	Bannerghatta	KARNATAKA	BANGALORE	15/05/2019	YES	4 Wheeler	KA05 MV031	300000.00	ABCFD1234E

Delete LastRow

Number of supporting documents : 1

Previous Save Next

Note:

- The deduction is available if the assessee does not already own any electric vehicle. The assessee can only claim the tax benefit towards interest paid on the loan taken for the purchase of the first electric vehicle.
- The loan must be taken from a financial institution or a non-banking financial company for buying an electric vehicle.
- The loan must be sanctioned anytime during the period starting from 1 April 2019 till 31 March 2023.
- “Electric vehicle” has been defined to mean a vehicle which is powered exclusively by an electric motor whose traction energy is supplied exclusively by traction battery installed in the vehicle and has such electric regenerative braking system, which during braking provides for the conversion of vehicle kinetic energy into electrical energy.
- A deduction for interest payment up to INR 1,50,000/-

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
Sundaram ▼	Father	Chronic Renal failure ▼	62	250000.00	100000.00	200000.00	0

Add New Row

Note : 1) Max limit should be based on the following criteria Minimum of Actual Medical Expenses (A) or max limit (If the age of dependent/self is less than 60 then benefit amount should be Rs. 40000) Minimum of Actual Medical Expenses (A) or max limit (If the age of dependent/self is 60 or above then benefit amount should be Rs. 100000).
2) Max Limit Allowed (B) – Change limit upto 100000 for senior/very senior citizens i.e. age more then 60 years.

Select the specified diseases, as certified by the Specialist

Number of supporting documents :

Previous

Save

Next

Note:

- The prescription containing the name and age of the patient, name of the disease or ailment along with the name, address, registration number and the qualification of the specialist issuing the prescription is sufficient enough along with original medical expenditure bills to claim 80DDB benefit.
- 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(U/s 80CCD1B)

Fields marked with (*) are mandatory.

Have a Query?



NPS PRAN Number *	Date of Payment* (dd/mm/yyyy)	Name of Account Holder *	Relationship	Amount *	
123456789112	15/07/2019	Rajesh L Rao	Self	55000.00	Delete

Add New Row

Total : 55000.00

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)

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 *	
123456	14/09/2019	Rajesh L Rao	20000.00	Paid	Quarterly	Delete
134567	14/12/2019	Rajesh L Rao	20000.00	Future Payment	Quarterly	Delete

Total Amount : 40000.00

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 : 1

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)
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date

Life Insurance Premium

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	Disabled/ Diseased	
1233	15/04/2011	30/10/2019	Paid <input checked="" type="checkbox"/>	Rajesh L Rao <input checked="" type="checkbox"/>	100000.00	20000.00	Half Yearly <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Diseas <input checked="" type="checkbox"/>	Delete
1234	15/06/2013	15/10/2019	Paid <input checked="" type="checkbox"/>	Shilpa V Rao <input checked="" type="checkbox"/>	200000.00	60000.00	Half Yearly <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Diseas <input checked="" type="checkbox"/>	Delete
1235	15/04/2012	15/12/2019	Future <input checked="" type="checkbox"/>	Anishka R Rao <input checked="" type="checkbox"/>	300000.00	40000.00	Half Yearly <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Select <input checked="" type="checkbox"/>	Delete

Total Premium Amount : 120000.00

Add New Row

Summary			
Policy #	Sum Assured	Total Premium Amount	Considered for 80C
1233	100000.00	20000.00	20000.00
1234	200000.00	60000.00	30000.00
1235	300000.00	40000.00	30000.00
Total :		120000.00	80000.00

Summary appears upon saving the LIC premium details

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
- 15% of the sum assured for policy purchased after 1st April 2013 and Policy Holder either Disabled or Diseased

3) Maximum eligibility criteria for Life Insurance Premium is Rs. 150000/-.

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	Status Of Payment*	Amount *	
123456	15/06/2019	Rajesh L Rao ▼	Self	Paid ▼	100000.00	Delete
987654	15/12/2019	Shilpa V Rao ▼	Spouse	Future ▼	100000.00	Delete

Add New Row

Total : 200000.00

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 : 2

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*	
234567	10/09/2019	Rajesh L Rao	200000.00	Delete

Add New Row

Total : 200000.00

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

Number of supporting documents : 3

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	01/08/2019	Rajesh L Rao	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 :

1

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 *	
1234	14/06/2019	Paid ▼	Anishka R Rao ▼	10000.00	HalfYearly ▼	VI	Delete
5678	14/02/2020	Future ▼	Anishka R Rao ▼	10000.00	HalfYearly ▼	VI	Delete

Add New Row

Total Fees Paid : 20000.00

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.
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.

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 or Payment *	
ICICI ELSS Fund	Yes ▼	Apr-19 ▼	Nov-19 ▼	Rajesh L Rao	1234	50000.00	Paid ▼	Delete
ICICI ELSS Fund	Yes ▼	Dec-19 ▼	Mar-20 ▼	Rajesh L Rao	6789	50000.00	Future ▼	Delete

Total Amount : 100000.00

Add New Row

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

Number of supporting documents : 1

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- Policy should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.

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 *	
ICICI Mutual Fund	Yes ▼	Apr-19 ▼	Nov-19 ▼	Rajesh L Rao	3456	80000.00	Paid ▼	Delete
ICICI Mutual Fund	Yes ▼	Dec-19 ▼	Mar-20 ▼	Rajesh L Rao	9876	70000.00	Future ▼	Delete

Total Amount : 150000.00

Add New Row

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

Number of supporting documents :

1

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- Statement should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.

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*	
12345	16/07/2019	Rajesh L Rao ▼	24000.00	Half-Yearly ▼	Paid ▼	Delete
89765	12/12/2019	Rajesh L Rao ▼	24000.00	Half-Yearly ▼	Future Payment ▼	Delete

Total Amount : 48000.00

Add New Row

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

Number of supporting documents : 2

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self, Spouse, & Children
- Policy should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.

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 *	
123456781345	15/05/2019	Rajesh L Rao ✓	Self	50000.00	Delete

Add New Row

Total : 50000.00

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

Number of supporting documents :

1

Previous


Save

Next

Sukanya Samriddhi 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	Status Of Payment*	Amount *	
12345	14/08/2019	Anishka R Rao ▼	Daughter	Paid ▼	10000.00	Delete
12345	12/01/2020	Anishka R Rao ▼	Daughter	Future ▼	10000.00	Delete

Add New Row

Total : 20000.00

Note : 1) If Sukanya Sumruddhi Scheme deducted from your salary will be automatically considered for exemption
2) Maximum eligibility criteria for Sukanya Sumruddhi 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	10/05/2019	Rajesh L Rao	75000.00	Delete

Total Amount : 75000.00

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 *	
1111	01/04/2014	Rajesh L Rao	50000.00	6055.00	Delete
2222	23/05/2015	Rajesh L Rao	40000.00	4456.00	Delete
3333	05/08/2016	Rajesh L Rao	30000.00	2838.00	Delete
4444	15/02/2017	Rajesh L Rao	35000.00	3265.50	Delete
5555	15/05/2017	Rajesh L Rao	55000.00	4686.00	Delete
6666	11/11/2017	Rajesh L Rao	45000.00	3784.50	Delete
7777	23/03/2018	Rajesh L Rao	23000.00	1881.40	Delete
8888	05/06/2018	Rajesh L Rao	80000.00	6080.00	Delete
9999	24/01/2019	Rajesh L Rao	70000.00	5600.00	Delete

Add New Row

Total Interest : 38646.40

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 : 9

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- NSC certificate should have been taken on or after April 01, 2014

Content Tracker

Locating the IPSF 2019-2020 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

PROPERTY 1

☐ Stamp duty

Click here to update stamp duty alone

Housing Loan Repayment Certificate* ☒ Yes ☐ No

Loan Lender/Bank Name:

PAN Of The LENDER:

Address of the Lender:

Address of the Property:

State:

City:

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

Loan Sanction Date	<input type="text" value="14/03/2020"/> (dd/mm/yyyy)	Other City	<input type="text"/>																				
Purpose of Housing Loan	<input type="text" value="Construction"/>	Date of Occupation/Possession	<input type="text" value="15/03/2020"/> (dd/mm/yyyy)																				
Stamp Duty/Reg. Charg Paid Date	<input type="text"/> (dd/mm/yyyy)	Stamp duty & Registration charges paid in current Financial Year)	<input type="text"/>																				
Loan Sanction Amount	<input type="text" value="3000000.00"/>	Value of the Property	<input type="text" value="2000000.00"/>																				
Is this your first Property	<input type="checkbox"/> (If Yes,check the box)	Total Principal Paid (Section 80C Benefit)	<input type="text" value="140000.00"/>																				
Pre-EMI Interest Paid	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Year Code</th> <th>Amount</th> <th>Year Code</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>2019-2020</td> <td><input type="text" value="0.00"/></td> <td>2018-2019</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>2017-2018</td> <td><input type="text" value="0.00"/></td> <td>2016-2017</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>2015-2016</td> <td><input type="text" value="0.00"/></td> <td>2014-2015</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td colspan="2" style="text-align: right;">Total :</td> <td colspan="2"><input type="text" value="0.00"/></td> </tr> </tbody> </table>			Year Code	Amount	Year Code	Amount	2019-2020	<input type="text" value="0.00"/>	2018-2019	<input type="text" value="0.00"/>	2017-2018	<input type="text" value="0.00"/>	2016-2017	<input type="text" value="0.00"/>	2015-2016	<input type="text" value="0.00"/>	2014-2015	<input type="text" value="0.00"/>	Total :		<input type="text" value="0.00"/>	
Year Code	Amount	Year Code	Amount																				
2019-2020	<input type="text" value="0.00"/>	2018-2019	<input type="text" value="0.00"/>																				
2017-2018	<input type="text" value="0.00"/>	2016-2017	<input type="text" value="0.00"/>																				
2015-2016	<input type="text" value="0.00"/>	2014-2015	<input type="text" value="0.00"/>																				
Total :		<input type="text" value="0.00"/>																					
Loan Type	<input checked="" type="radio"/> Single <input type="radio"/> Joint <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Borrower Name</th> <th>Percentage(%)</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="Rajesh L Rao"/></td> <td><input type="text" value="100"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>			Borrower Name	Percentage(%)	<input type="text" value="Rajesh L Rao"/>	<input type="text" value="100"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>												
Borrower Name	Percentage(%)																						
<input type="text" value="Rajesh L Rao"/>	<input type="text" value="100"/>																						
<input type="text"/>	<input type="text"/>																						
<input type="text"/>	<input type="text"/>																						

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, 2020; however, Principal can be claimed
- Stamp Duty/Registration charges can be claimed if they are paid in FY 2019-2020
- 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.

Loss from House Property – Self Occupied (Continued..)

PROPERTY 2

☐ Stamp duty

Housing Loan Repayment Certificate* ☒ Yes ☐ No

Loan Lender/Bank Name: HOFC

PAN of The Lender: ATYPM1234R

Address of the Lender: Ka

Address of the Property: CX

State: KARNATAKA

City: BANGALORE

To comply with top 10 CNVASP vulnerabilities following special characters are not allowed: @#\$%^&*()+=-[]{};

Loan Sanction Date: 15/07/2019 (dd/mm/yyyy)

Purpose of Housing Loan: Construction

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

Date of Occupation/Possession: 15/09/2019 (dd/mm/yyyy)

Loan Sanction Amount: 2000000.00

Value of the Property: 3000000.00

Is this your first Property? ☒ (If Yes, check the box)

Total Interest Paid: 500000.00

Total Principal Paid (Section 80C Benefit): 3000000.00

Pre-EMI Interest Paid		Total	
Year Code	Amount	Year Code	Amount
2019-2020	0.00	2018-2019	0.00
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
Total :		0.00	

Loan Type: ☒ Single ☐ Joint

Borrower Name	Percentage (%)
Rajesh L Rao	100

Qualifying Pre-EMI Interest Paid		Total	
Year Code	Amount	Year Code	Amount
2019-2020	0.00	2018-2019	0.00
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
Total :		0.00	

Housing Loan Interest & Principal considered for Tax Benefit

Total Interest	Total Principal	Benefit U/s 80EE	Benefit U/s 80EEA
2000000.00	4400000.00	0.00	1500000.00

Option has been given to update the details of Self Occupied Property - 2

Key Points:

- No tax on notional rent of second self-occupied house i.e., up to two self-occupied house properties can be considered for benefit while calculating the income from house property from the FY 2019-20.
- An assessee can claim that he has two self-occupied house properties and hence deduction with respect to interest on borrowed capital for self occupied house property can be claimed with respect to both the houses. However, there is no change in the aggregate limit for the deduction on account of interest which remains the same, i.e. Rs. 2,00,000.
- The Finance (No. 2) Act, 2019 has inserted a new Section 80EEA under the Income Tax Act for those individuals who are not eligible to claim deduction under Section 80EE. An individual can claim deduction up to Rs. 150,000 under section 80EEA subject to following conditions:
 - Loan should be sanctioned by the financial institution during the period beginning on 01-04-2019 and ending on the 31-03-2020;
 - Value of residential house property should not exceed Rs. 45 lakhs;
 - The assessee should not own any residential house property on the date of sanction of loan; and
 - The assessee should not be eligible to claim deduction under Section 80EE.

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

Click here to update Let-out Income

Previous year's unadjusted loss can be adjusted against income chargeable to tax under the head "Income from house property in the current year"

Let Out Property 1	
Yes	
ICICI	
ABCPD1234Z	
No.75, KK Road, Bangalore	
No 123, 1st Main, 2nd Cross, MG Road	
KARNATAKA	
Bangalore	
15/09/20	
Purchase	
25/02/20	
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

Rental Income Received for 2019-2020	
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 Loss Amount from Previous Years	
Loss claimed during the Previous Years	
Carry Forward Amount for 2019-2020	
Total Principal	

400000.00
5000.00
395000.00
118500.00
Joint
50
25000.00
251500.00
100000.00
50000.00
50000.00
250000.00

Key Points:

- Interest and Pre EMI Interest can be claimed only if the property has been occupied before 31st March, 2020; 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 2019-2020
- Rental income/notional income is mandatory to claim tax benefit under this section

Content Tracker

Locating the IPSF 2019-2020 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

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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	XYZ	ATYPM6543W	ATRP12345T	01/04/2019	02/04/2019	Delete

Salary Details

Company Name	Earnings (After Sec 10 Exemption)*	Professional Tax*	Taxable Income*	Provident Fund*	Vol. Provident Fund*	Income Tax Deducted in Prev Employer*
XYZ	500000.00	200.00	450000.00	3000.00	300.00	4000.00
Total :	500000.00	200.00	450000.00	3000.00	300.00	4000.00

Add New Row

Update Final Taxable Income after all exemptions and deductions

Key Points:

- The information must pertain from 1st April, 2019 to the Date of Leaving with the previous employer.
- Proofs to be submitted as per guidelines circulated

Content Tracker

Locating the IPSF 2019-2020 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

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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 *	
NSC Interest		38646.4	
Bank Interest (excluding interest on savings account) ▼	15/06/2019	30000.00	Delete
Interest Income to Senior Citizen(Considered as deduction u/s 80TTB upto Rs.50000) ▼	10/08/2019	25000.00	Delete
Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000) ▼	18/09/2019	40000.00	Delete

Add New Row

Total: 133646.40

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

Number of supporting documents : 3

Previous

Save

Next

Key Points:

- NSC Interest will automatically be considered as Other Income.

Content Tracker

Locating the IPSF 2019-2020 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

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IPSF Confirmation Screen

Investment Proofs Submission Form 2019-2020

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	Property ID
01/04/2019	31/03/2020	18000.00	216000.00	SHIMOGA	N	1

Section B - Chapter VI A - Deductions from Total Income

Particulars	Amount
Interest on Educational Loan (U/s 80E)	400000.00
Additional NPS Employee Contribution (U/s 80CCD1B)	55000.00
Electric Vehicle Loan Interest Benefit (U/s 80EEB)	300000.00
Section B - Total	755000.00

Section C - Chapter VIA - Section 80C

Particulars	Amount
Contribution to Pension Fund (80CCC)	40000.00
Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc	80000.00
Public Provident Fund (PPF)	200000.00
National Savings Certificate (NSC)	200000.00
Infrastructure Bonds	60000.00
Children Education Tuition fees	20000.00
Equity Linked Savings Scheme (ELSS)	100000.00
Mutual Funds	150000.00
Unit Linked Insurance Plan	48000.00
NPS Employee Contribution	50000.00
Sukanya Samriddhi Scheme	20000.00
Fixed Deposit Scheme (Block Period of 5 yrs)	75000.00
NSC Interest (Will also be considered as Other Income)	38646.40
Section C - Total	1081646.40

Section D - Housing Loan

Particulars	Interest Amount	Principal Amount
Loss from House Property- SELF OCCUPIED	-200000.00	440000.00
Loss from House Property- LETOUT	-38500.00	650000.00

All your inputs
get consolidated
into one

IPSF Confirmation Process

The screenshot shows a web application interface for IPSF confirmation. It features a table of financial data, a confirmation message box, and a declaration section. Four green callout boxes with arrows indicate the steps: 1. Check the box if you wish to confirm (pointing to a checkbox), 2. Click here if you wish to save and view (pointing to the 'Save and View' button), 3. Click here to Confirm and Print (pointing to the 'Confirm and Print' button), and 4. Click OK to continue (pointing to the 'OK' button in the confirmation message box).

Particulars	Amount	Principal Amount
Loss from House Property - SE	000000.0	440000.00
Loss from House Property - LE	8500.00	650000.00

Particulars	Amount
Bank Interest (excluding interest on deposits in saving)	30000.00
Dividend	25000.00
Interest on Deposits in Saving	40000.00
	95000.00

Particulars	Amount
Provident Fund	205860.00
Medical Insurance with a Senior Citizen	26344.00
Payroll Deduction - Total	232204.00

☒ 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.

Buttons: Save and View, Confirm and Print, Re-print Report

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 2019-2020**” link on the home page under the Year End tab. This must be done before confirming the IPSF.

Content Tracker

Locating the IPSF 2019-2020 Link

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

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
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- Section E Previous Employer Details
- Section G Other Income

IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure

Scan Image Upload

Printable IPSF



PGBRK



IPSF|4762|153920|0124100003||W||

Unique
Barcode

All the proofs have to be uploaded using the scan image option using the link "Upload IPSF Proof Images". No hard copy proofs will be accepted. Please ensure to consolidate all the images of your investment proofs; create a ZIP file & upload.

Technologies India Pvt Ltd IPSF ID : 0124100003

Investment Proofs Submission Form for the Year 2019-2020

Employee ID *	153920	Gender *	M	Date of Joining	01/03/2012
Name *	Rajesh L Rao		No. of Children going to School *	1	
PAN *			No. of Children going to Hostel *	0	

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

From Date	To Date	Address	Rent Paid Per Month	Rent Paid Per Annual	Property ID
01/04/2019	31/03/2020	GR Nagar, 8th Cross, 8th Phase, SHIMOGA, KARNATAKA	18000.00	216000.00	1

As Per Last Declaration	Section B - Chapter VI A - Deductions from Total Income	Value of Proof Attached.
0	Medical Insurance Premium (U/s 80D)	0.00
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	0.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%	75000.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%	0.00
0	Interest on Educational Loan (U/s 80E)	400000.00
0	Permanent Physical Disability (U/s 80U) < 80%	75000.00
0	Permanent Physical Disability Severe Disability (80U) > 80%	0.00
0	Medical Treatment of Specified Diseases (U/s 80DDB)	0.00
0	Medical Treatment of very senior citizen (80DDB)	0.00
0	Medical Treatment of senior citizen (80DDB)	0.00
0	Additional Housing Loan Interest Benefit (U/s 80EE)	0.00
0	Additional NPS Employee Contribution (U/s 80CCD1B)	55000.00
0	Electric Vehicle Loan Interest Benefit (U/s 80EEB)	300000.00
0	Additional Housing Loan Interest Benefit (U/s 80EEA)	0.00
Section C - Chapter VIA - Section 80C		
0	Contribution to Pension Fund (80CCC)	40000.00

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...

Dependent Details
will also appear on
IPSF confirmation
page



Dependant Details:		
Dependant Name	Relationship	Age
Rajesh L Rao	Self	47
Shilpa V Rao	Spouse	44
Anishka R Rao	Daughter	14
Laxminarayan Mairpady Rao	Father	84
Laxmi Mairpady Rao	Mother	69

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:

Signature is
mandatory

Place:



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 2019-2020 Link

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

Section wise Data Entry

- Section A HRA
- Section B Chapter VI A - Deductions from Total Income
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- 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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Computation of Income/ Loss from House Property - Let Out

COMPUTATION OF INCOME / LOSS FROM HOUSE PROPERTY - LETOUT				
1. Name and Address of the Employee	Rajesh L Rao			
2. Permanent Account Number				
House Property U/s 24	Amount			
	Property 1		Property 2	
(a) Housing Interest paid for 2019-2020 as per certificate		25000		500000
(b) Rental Income / Notional rental income for the year 2019-2020	400000		300000	
(c) Less: Municipal Tax Paid to the authorities	5000		0	
(d) Net Income from House Property (b - c)	395000		300000	
(e) Less: Repairs and Renewals @30% on Net Income (d * 30%)	118500		90000	
(f) Net Actual Income to be set off (d - e)		276500		210000
(g) Net value of Loss / Income for the year (a - f) 2019-2020	251500		(290000.0)	
(h) Total Loss Amount from Previous Years	100000		0	
(i) Loss claimed during the Previous Years	50000		0	
(j) Carry Forward Amount for 2019-2020	50000		0	
(k) Final Net value of Loss / Income for the year 2019-2020 (g-j) - after adjusting Previous Year Carried Forward Loss Amount, if any (applicable and adjusted only in case of Income from Let Out Property for the year 2019-2020)	(38500.0)			
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 31/03/2020

1. Name and address of the employee	153920
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 - 2019-2020	
(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)	30000.0
(b) Dividend	25000.0
(c) Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000)	40000.0
5. Aggregate of sub-items (i) to (iv) of item 4	Total Rs. 95000.00

.....
Signature of the Employee

Verification

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

Place

Declaration for Premium falling due after proof cut-off date

DECLARATION FOR PREMIUMS FALLING DUE AFTER PROOF CUT OFF DATE OF 02-12-2019

Employee ID : 153920
Employee Name : Rajesh L Rao

Given below are the details of premiums that are due for payment after the proof cut off date, but are payable before the financial year-end 2019-2020. Please consider these premiums payable for the tax benefit in the current financial year 2019-2020.

Contribution to Pension Fund (80CCC)			
Policy #	Expected Date of Payment	Name of Policy Holder	Amount
134567	14/12/2019	Rajesh L Rao	20000.0
Total			20000.00

Public Provident Fund (PPF)				
Policy #	Expected Date of Payment	Name of Policy Holder	Status of Payment	Premium Amount
987654	15/12/2019	Shilpa V Rao	F	100000
Total				100000.00

Sukanya Samriddhi Scheme				
Policy #	Expected Date of Payment	Name of Policy Holder	Status of Payment	Premium Amount
12345	12/01/2020	Anishka R Rao	F	10000
Total				10000.00

Note: Benefit would be extended only on submission of this Form for any premiums falling due after the proof cut off date.

Employee Declaration

I here by declare that the information provided above is true and correct and will be solely responsible for any situation arising out of non-payment of the above premiums before 31/03/2020.

Signature :

Date :

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 31/03/2020

Name and address of the employee : 320512

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	XYZ	ATRP12345T	ATYPM6543W	2	NA	NA	NA	500000	3300	4000	Professional Tax Rs. 200

.....
Signature of the Employee

Verification

I, Uday Kumar Sirivelu , 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 :

320512

Permanent Account No. :

Period Year ending

31/03/2020

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 Continued...

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 perquisite (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 Continued...

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 Rajesh L Rao, have gained the ownership/ possession of my house property located at the following address, on 15/03/2020(DD/MM/YYYY).

Address:

JP Nagar 6th Phase

BANGALORE, KARNATAKA

Loan Lender/ Bank Name: HDFC

Loan Sanction Date : 14/03/2020

Date:

Signature

Notes: 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 Continued...

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 Uday Kumar Sirivelu, have gained the ownership/ possession of my house property located at the following address, on 01/06/2018(DD/MM/YYYY).

Address:

Yelachenahalli

Bangalore, KARNATAKA

Loan Lender/ Bank Name: ICICI

Loan Sanction Date : 01/01/2012

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 Continued...

FORM NO.12BB
(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 U .
2. Permanent Account Number of the employee
3. Financial year 2019-2020

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.null	Rs.null	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 Self Occupied Interest - Property 1 :Rs.-200000 Self Occupied Interest - Property 2 :Rs.-300000 Total Self Occupied Interest :Rs.-200000 Let-Out Interest : Rs.-20000 Let-Out Interest : Rs.-10000 (ii) Name of the lender Self Occupied - Property 1 :ICICI Self Occupied - Property 2 :HDFC Let-Out Property 1 :ICICI Let-Out Property 2 :BANK (iii) Address of the lender Self Occupied - Property 1 :JP Nagar Self Occupied - Property 2 :Jayanagar Let-Out Property 1 :Banashankari Let-Out Property 2 :Jayanagar	Rs.-230000.0	Provisional Certificate from Bank/Financial Institution/Lender

Annexure Continued...

4	Deduction under Chapter VI-A		Rs. 490000.0	Photocopy of the investment proofs
	(A) Section 80C, 80CCC and 80CCD			
	(i) Section 80C			
	(a) Housing Loan - Principal Amount paid, Registration Fees, Stamp duty	: Rs.490000		
	(ii) Section 80CCC	:		
	(iii) Section 80CCD	:		
	(B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.			
	(a) Additional NPS Employee Contribution (U/s 80CCD1B)	: Rs.0		
Verification				
I, Uday Kumar Sirivelu, son/daughter of Subramanyam Sirivelu do hereby certify that the information given above is complete and correct				
Place : BANGALORE				
Date : 24/11/2019				
Designation : SENIOR ENGINEER			(Signature of the employee) Full Name: Uday Kumar Sirivelu	

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.

Annexure Continued...

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

Key Points:

- Any deduction through pay slip 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 2019-2020 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

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 example:

Correct- "EMPIDIPSF201920.zip".

Incorrect- "EMPID IPSF 2019 20.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.
- You will not be able to upload the proof images if the IPSF is not confirmed.



PGRRK



IPSF47621539201012410000311W11

All the proofs have to be uploaded using the scan image option using the link "Upload IPSF Proof Images". No hard copy proofs will be accepted. Please ensure to consolidate all the images of your investment proofs; create a ZIP file & upload.

Technologies India Pvt Ltd				IPSF ID : 012410000	
Investment Proofs Submission Form for the Year 2019-2020					
Employee ID *	153920	Gender *	M	Date of Joining	01/03/2012
Name *	Rajesh L Rao		No. of Children going to School *	1	
PAN *			No. of Children going to Hostel *	0	
Section A - Rent Paid for claiming HRA exemption (Only Rent Receipts will be considered)					
From Date	To Date	Address	Rent Paid Per Month	Rent Paid Per Annual	Property ID
01/04/2019	31/03/2020	GR Nagar, 8th Cross, 8th Phase,SHIMOGA,KARNATAKA	18000.00	216000.00	1
As Per Last Declaration	Section B - Chapter VI A - Deductions from Total Income			Value of Proof Attached	
0	Medical Insurance Premium (U/s 80D)			0.00	
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			0.00	
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%			75000.00	
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%			0.00	
0	Interest on Educational Loan (U/s 80E)			400000.00	
0	Permanent Physical Disability (U/s 80U) < 80%			75000.00	
0	Permanent Physical Disability Severe Disability (80U) > 80%			0.00	
0	Medical Treatment of Specified Diseases (U/s 80DDb)			0.00	
0	Medical Treatment of very senior citizen (80DDb)			0.00	
0	Medical Treatment of senior citizen (80DDb)			0.00	
0	Additional Housing Loan Interest Benefit (U/s 80EE)			0.00	
0	Additional NPS Employee Contribution(U/s 80CCD1B)			55000.00	
0	Electric Vehicle Loan Interest Benefit (U/s 80EEB)			300000.00	
0	Additional Housing Loan Interest Benefit (U/s 80EEA)			0.00	
Section C - Chapter VIA - Section 80C					
0	Contribution to Pension Fund (80CCC)			40000.00	

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 2019-2020

Upload IPSF Proof Images

IPSF Proofs

This module is used for uploading scanned images of IPSF proofs

Employee ID Employee Name Year Code 2019-2020

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 "2019-2020"). 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 "2019-2020". 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. A "Save" button is also visible. The "Note" section and "Fields marked with (*) are mandatory." note are also present.

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	2019-2020
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	2019-2020
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.

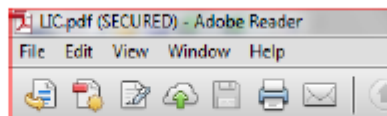
Thanks in advance.

Scan Image Upload Contd...

Employee ID		Employee Name		Year Code	2019-2020
File Transfer has failed. because one or more entries in the uploaded Zip file is either corrupted or secured/Password Protected.					
Image Upload - IPSF Proofs					
IPSF ID *	- Select any one -				
Upload File *					Browse...
<input type="checkbox"/> Disclaimer : 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.					
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. 3.Multiple times file uploading is not allowed 4.Ensure all your proofs along with bar-coded IPSF duly signed including the annexures that get generated along with IPSF are scanned and one consolidated .Zip file should be uploaded					

For those Scan images where you may have received the scan image with Secured mode or with password encrypted / with null password.

Convert the pdf files in to (.tif/.pdf/.Jpg/.Bmp) format or re-scan PDF file and upload,



Don't upload the scan image with Secured mode with password encrypted/with null password

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	2019-2020
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"/>				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 them
2	The .zip file size should be less than 20MB	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 print out, 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