



## myInvestments

myInvestments is where an employee can Declare investments. Both the Proposed investment and actual investments can be made in the same tool. While declaring actual investments employee can upload soft copies of the proof. Proofs are not required while proposing investment for the year.

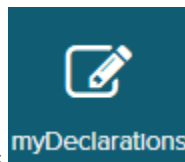
Investment Declarations happen in 2 phases

- Propose
- Actual

## Actual Phase

During the Actual phase an employee can submit any investment made during the financial period. During this phase the employee will have to submit proof. A soft copy of the proofs can be directly uploaded in myView. Please note the employee will need to create new records during this phase and the records saved during the propose phase will not be active to submit actual investment for the year.

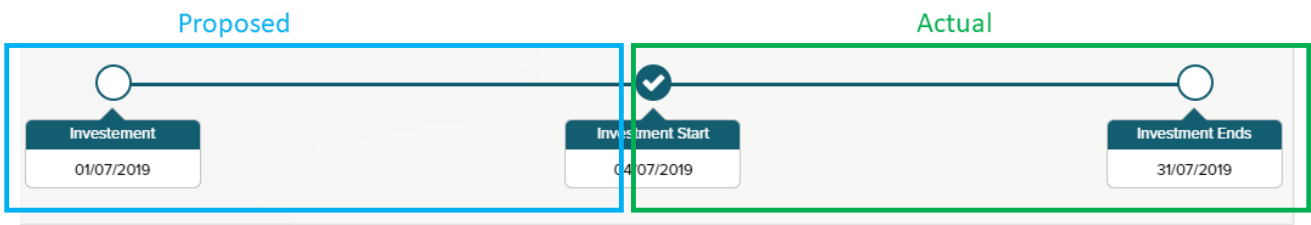
To submit actual investment the employee will need to follow the following steps:



1. Click on myDeclarations
2. In the myInvestments tile you can view a summary of the current status of the investments declared so far

myInvestments	
Housing (HRA / CLA / C...	₹ 96,050.00
Loss/Income from Hous...	₹ 1,25,000.00
Section 80C Deductions	₹ 35,000.00
Section 80 Deductions	₹ 0
<a href="#">VIEW / EDIT</a>	

3. The investment timeline provides details of the phase



To view the Investment declarations made during the Propose phase click on Proposed Request

The screenshot shows the 'Investment Start' page. At the top left is a blue '+ ADD DECLARATION' button. At the top right is a red-bordered button labeled 'PROPOSED REQUESTS'. Below these are 'FILTER' and 'PRINT' icons. A search bar is located on the right. A table with columns 'TYPE', 'SUB TYPE', 'REFERENCE NO.', 'CREATED DATE', 'REQ. AMOUNT', and 'STATUS' is shown below. At the bottom right, there is a 'Rows Per Page' dropdown set to 10 and pagination controls showing '1 of 1'.

- + ADD DECLARATION
1. Click on to add new declarations
  2. Select the Declaration Type

The screenshot shows the 'Declaration Type' dropdown menu. The selected option is 'Section 80C Deductions'. Other visible options include 'Housing (HRA / CLA / COA)', 'Income From Other Sources', 'Previous Employment Tax Details', 'Section 80 Deductions', and another 'Section 80C Deductions' option at the bottom.

## Section 80C Deductions

## Payment towards Life Insurance Policy

- a. Select the investment type

**Investment Type\***

Please Select

5 Year Fixed Deposit with a Scheduled Bank

Contribution to Public Provident Fund ( PPF )

Contributions to Unit Linked Insurance Plans

Education Tuition fee - child 1

Education Tuition fee - child 2

Payment towards Life Insurance Policy

- b. Select **Payment towards Life Insurance Policy**

[RETURN](#)

**Declaration Type**

Section 80C Deductions

**Investment Type\***

Payment towards Life Insurance Policy

**Dependent Details\***

Action	Relation	Name
<a href="#">+ ADD DEPENDENTS</a>		

**Policy Date\***

3rd Feb 2019

**Sum Assured\***

₹ 15,00,000

**Reference Document Number ? \***

123df343

**Amount\***

₹ 71,754

**i** The Maximum Limit for this Investment type is 9999999.00

**Please Upload Proof ? \***

[UPLOAD](#)

☒ I acknowledge and accept: [TERMS AND CONDITIONS](#)

[SUBMIT](#)


- c. Provide details of the Beneficiaries of the Life Insurance Policy in Dependent Details
- d. Click [+ ADD DEPENDENTS](#)
- e. Provide the relation with the employee and Name of the beneficiary


**Dependent Details**

Action	Relation	Name
<a href="#">+ ADD DEPENDENTS</a>		
	Please Select	

- f. Provide the policy date and the sum assured (This is a client specific option)
- g. Enter the Amount
- a. Click on Upload, to upload softcopy of the investment
  - i. Max 5 Document can be uploaded
  - ii. Accepted format: JPEG, JPG, PNG, PDF
  - iii. Max Size: 2.00 MB



Click on  **VIEW** to view the attachment

Click on  **DELETE** to delete the attachment

- h. Read, Acknowledge and accept the terms and conditions and click Submit

Education Tuition Fee – Child 1

b. Select the investment type

Investment Type\*

Please Select

5 Year Fixed Deposit with a Scheduled Bank

Contribution to Public Provident Fund ( PPF )

Contributions to Unit Linked Insurance Plans

Education Tuition fee - child 1

Education Tuition fee - child 2

Payment towards Life Insurance Policy

c. Select **Education Tuition fee – child 1**

RETURN

Declaration Type

Section 80C Deductions

Investment Type\*

Education Tuition fee - child 1

Dependent Details\*

Action	Relation	Name
ADD DEPENDENTS		
✖	Please Select	
	Child1	
	Child2	

Reference Document Number ? \*

123df343

Amount\*

₹ 71,754

The Maximum Limit for this Investment type is 9999999.00

Please Upload Proof ? \*

UPLOAD

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SUBMIT

- d. Click **ADD DEPENDENTS**
- e. Provide the relation with the employee and Name of the beneficiary. Only children can be added for this specific investment time

- f. Enter the **Reference Document Number**

**Reference Document Number** ?

Can be Policy no, Receipt no, Document no,  
Account no, Bill No. etc.,

- g. Enter the Actual Amount
- h. Click on Upload, to upload softcopy of the investment
- iv. Max 5 Document can be uploaded
  - v. Accepted format: JPEG, JPG, PNG, PDF
  - vi. Max Size: 2.00 MB

Read, Acknowledge and accept the terms and conditions and click Submit

## Housing (HRA / CLA / COA)

Declaration Type  
Housing (HRA / CLA / COA)

Accommodation Type\*  
Rented Accom.

From\*  
22nd Apr 2019

To\*  
31st Mar 2020

Landlord's Name\*

Landlord's Address\*  
200 characters remaining

Please Upload Proof ? \*  
UPLOAD

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City\*  
Please Select

Monthly Rent\*  
₹

Landlord's PAN

Particulars  
200 characters remaining

SUBMIT

- a. Select the Accommodation Type (Mandatory)
- b. Select the **City** (Mandatory)
- c. Provide date range (Mandatory)
- d. Provide the **Monthly Rent** (Mandatory)
- e. Provide **Landlord's Name** (Mandatory)
- f. Provide **Landlord's PAN** if monthly rent is greater than 8333
- g. Provide **Landlord's Address** (Mandatory)
- h. Provide any other details in **Particulars**
- i. Click on Upload, to upload softcopy of the investment
  - a. Max 5 Document can be uploaded
  - b. Accepted format: JPEG, JPG, PNG, PDF
- j. Read, Acknowledge and accept the terms and conditions and click Submit

Note: If the House Rent has changed in the middle of the year the employee will need to add another entry specifying the appropriate start and end dates.

## Loss/Income from House Property (Sec 24)

## Type: Self-Occupied/Deemed self-occupied House

<b>Declaration Type</b> Income From Other Sources	
<b>Source Type*</b> House Property	
<b>Types*</b> Self-Occupied House Property	<b>Purpose of Loan*</b> Construction / buying of house
<b>Select House Property*</b> Please Select	<b>Eligible for Sec.80EEA Exemption*</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Loan Category*</b> <input checked="" type="radio"/> Single <input type="radio"/> Joint	<b>Percentage of Share*</b> 100
<b>Commencement of Loan*</b> <input type="text"/>	<b>Pre EMI Amount(Total Interest amount paid prior to possession date)</b> <input type="text"/>
<b>Actual Interest Paid Current Yr.*</b> <input type="text"/>	<b>Possession Date*</b> <input type="text"/>
<b>Lender's Name*</b> <input type="text"/>	<b>PAN of Lender*</b> <input type="text"/>
<b>Lender's Address*</b> <input type="text"/>	<b>Lender's Type*</b> Please Select
<b>Employee Comments</b> <input type="text"/>	

1. Select Loss/Income from House Property (Sec 24)
2. Select **Source Type**: House Property
3. Select **Type**: Self-Occupied/Deemed self-occupied house

**Types\***

Please Select

Self-Occupied/Deemed self-occupied House

Wholly Let out House Property

for Self-Occupied/Deemed self-occupied house the participant can declare up to 2 houses. The same can be selected in the **Select House Property** field discussed below

4. Select the **Purpose of Loan**

**Purpose of Loan\***

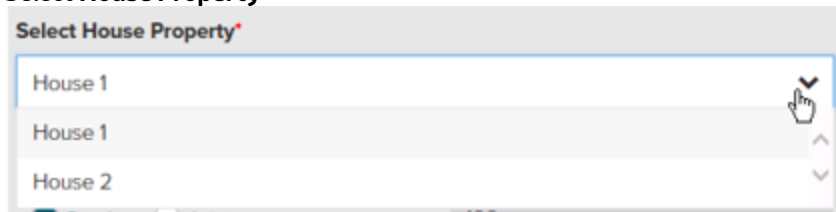
Construction / buying of house

Construction / buying of house

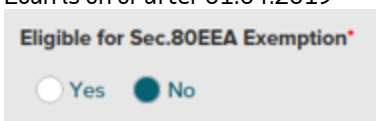
Renovation



5. Select **House Property**

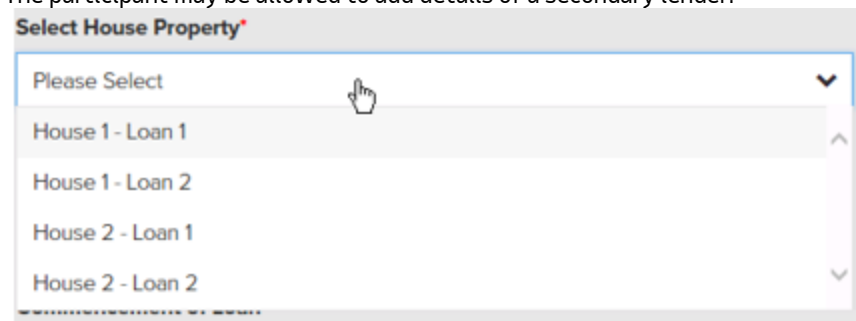


6. Provide if the property is eligible for **Section 80EEA Exemption**. This field will only be applicable if Commencement of Loan is on or after 01.04.2019



7. Provide **Loan Category** and **Share Percentage** if any
8. Provide **Pre EMI Amount** if Possession date is below 5 years from the start date of the current financial year.
9. Provide **Commencement of Loan Date**
10. Provide **Possession Date**
11. Provide details of the **Actual Interest Paid** in the current year  
\*The Actual Interest amount is restricted to under 30,000 INR, if the Purpose of Loan is Renovation
12. Provide Lender's Name, PAN and Address

The participant may be allowed to add details of a secondary lender.



\*This is a client specific option, with a maximum of 2 lenders allowed.

13. Provide if Lender type is Employer, Financial Institution or other
14. Click on Upload, to upload softcopy of the proof
  - a. Max 5 Document can be uploaded
  - b. Accepted format: JPEG, JPG, PNG, PDF
  - c. Max Size: 5.00 MB
15. Read, Acknowledge and accept the terms and conditions and click Submit

## Type: Wholly Let out House Property

<b>Declaration Type</b> Loss/Income from House Property (Sec 24)	
<b>Source Type*</b> House Property	
<b>Types*</b> Wholly Let out House Property	<b>Purpose of Loan*</b> Construction / buying of house Construction / buying of house Renovation No loan
<b>Select House Property*</b> New House	
<b>Loan Category*</b> <input checked="" type="radio"/> Single <input type="radio"/> Joint	<b>Percentage of Share*</b> 100
<b>Pre EMI Amount</b> ₹	
<b>Commencement of Loan*</b> [Calendar Icon]	
<b>Possession Date*</b> [Calendar Icon]	
<b>Proposed Interest Paid Current Yr.*</b> ₹	
<b>Proposed Annual Rental Income*</b> ₹	
<b>Proposed 30% Rebate &amp; Maintenance Let-Out*</b> [Input Field]	
<b>Proposed Annual Municipal Tax Paid</b> [Input Field]	

1. Select Loss/Income from House Property (Sec 24)
2. Select **Source Type**: House Property
3. Select **Type**: Wholly let out House Property

<b>Types*</b> Please Select Self-Occupied/Deemed self-occupied House Wholly Let out House Property
---

4. Select the **Purpose of Loan**

**Purpose of Loan\***

Construction / buying of house

Construction / buying of house

Renovation

No loan

\*If No Loan is selected employees are allowed to submit only rental income without interest.

**Declaration Type**

Loss/Income from House Property (Sec 24)

**Source Type\***

House Property

**Types\***

Wholly Let out House Property

**Purpose of Loan\***

No loan

**Select House Property\***

New House

**Proposed Annual Rental Income\***

₹ 50,000

**Proposed 30% Rebate & Maintenance Let-Out\***

₹ 11237.10

**Proposed Annual Municipal Tax Paid**

₹ 12,543

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✓ SUBMIT

5. Select **House Property**

6. Provide if the property is eligible for **Section 80EEA Exemption**. This field will only be applicable if Commencement of Loan is on or after 01.04.2019

Eligible for Sec.80EEA Exemption\*

☐ Yes ☒ No

7. Provide **Loan Category** and **Share Percentage** if any
8. Provide **Pre EMI Amount** if Possession date is below 5 years from the start date of the current financial year.
9. Provide **Commencement of Loan Date**
10. Provide **Possession Date**
11. Provide details of the **Actual Interest Paid** in the current year  
\*The Actual Interest amount is restricted to under 30,000 INR, if the Purpose of Loan is Renovation
12. Provide **Lender's Name, PAN** and **Address**
13. Provide if **Lender type** is Employer, Financial Institution or other
14. Click on Upload, to upload softcopy of the proof
- Max 5 Document can be uploaded
  - Accepted format: JPEG, JPG, PNG, PDF
  - Max Size: 5.00 MB
15. Read, Acknowledge and accept the terms and conditions and click Submit

## Previous Employment Tax Details

**Declaration Type**  
Previous Employment Tax Details

PREVIOUS EMPLOYEE TAX DETAILS	ACTUAL AMOUNT
Gross salary after sec10	₹ 50,000
Prof. Tax Deducted	₹ 400
Prov. Fund Deducted	₹ 6,450
Income Tax Ded. Incl. Cess and Surcharge	₹ 5,400

Previous Employment Tax details should be between 1st Apr 2019 and 4th Jun 2019

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Use previous employer provided tax form to update the following information

1. Provide **Gross salary after sec10**
2. Provide **Professional Tax Deducted** by previous employer
3. Provide **Provident Fund Deducted** by previous employer
4. Provide **Income tax deducted and Cess and Surcharge**
5. Upload the previous employer tax form
6. Read, Acknowledge and accept the terms and conditions and click Submit

The participant will be allowed to modify any existing request and system will close previous request and consider latest one for tax exemption upon approval.

\* In case the employee has had more the one employer in the current financial year he/she will need to consolidate and provide the details.

Review Information

- 1. The investment declarations can be viewed on the myInvestments home screen

Investments Timeline

Investment

01/07/2019

Investment Start

04/07/2019

Investment Ends

31/07/2019

Investment Start

+ ADD DECLARATION

PROPOSED REQUESTS

FILTER

PRINT

Search:

TYPE	SUB TYPE	REFERENCE NO.	CREATED DATE	REQ. AMOUNT	STATUS
Section 80C Deductions	Contribution to Public Provident Fund ( PPF )	4002457800007	4th Jul 2019	₹ 35,000.00	Pending for f
Loss/Income from House Property (Sec 24)	Self-Occupied/Deemed self-occupied House	4002457800006	4th Jul 2019	₹ 1,25,000.00	Pending for f
Housing (HRA / CLA / COA)	Rented Accom.	4002457800005	4th Jul 2019	₹ 8,500.00	Pending for f

Rows Per Page

10

<


<

1

of 1

>

>

- 2. Scroll right to to click on  to view the documents uploaded

RETURN

Reference: 4002457800005

Declaration Type: Housing (HRA / CLA / COA)

Amount Requested ₹ 8,500.00

Attachment(s):

1 2 3 4 5

Protected View: This file originated from a potentially unsafe location, and most features have been disabled to avoid potential security risks.

Options

X

Rent Receipt January 2019

RENT RECEIPT

- 3. All attached proofs can be viewed one after another
- 4. To make changes or edit the investment declaration click on Reference No.

Investment Start ⓘ

+ ADD DECLARATION

PROPOSED REQUESTS

▼ FILTER | PRINT

Search:

TYPE	SUB TYPE	REFERENCE NO. ▼	CREATED DATE	REQ. AMOUNT	STATUS
Section 80C Deductions	Contribution to Public Provident Fund ( PPF )	4002457800007	4th Jul 2019	₹ 35,000.00	Pending for f
Loss/Income from House Property (Sec 24)	Self-Occupied/Deemed self-occupied House	4002457800006	4th Jul 2019	₹ 1,25,000.00	Pending for f
Housing (HRA / CLA / COA)	Rented Accom.	4002457800005	4th Jul 2019	₹ 8,500.00	Pending for f

Rows Per Page 10

**Form 12BB:** This form will be available for the employee in myForm post March Payroll

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