

Investment Portal





Investment Portal-Key Features

Tax Calculator

- New income tax budget 2023 changes have been updated in the tax calculator.
- New Tax regime is default regime from Apr 2023.
- ❖ Employees can check the tax amount as per the old regime vs the new regime in the tax calculator before investment submission.

New Investment Portal

- Employees must declare the Tax
 Regime on the new investment
 portal, If not opted then by default
 new regime will be considered for
 the tax process.
- Employees can not change tax regime during the current financial year.
- New joiners must be declared the same tax regime which was declared in the previous organization

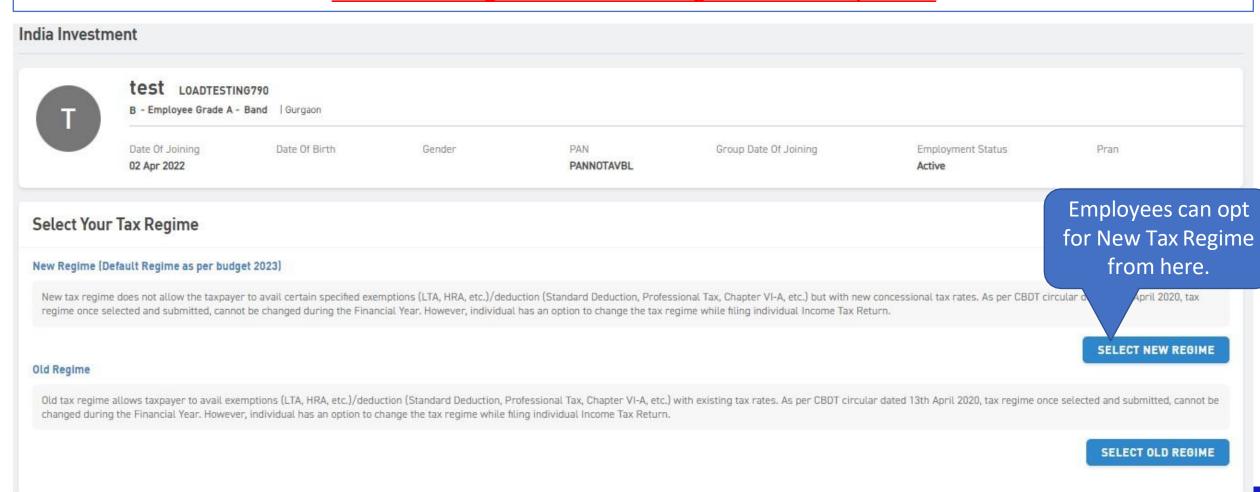


New Tax Regime

Tax Regime

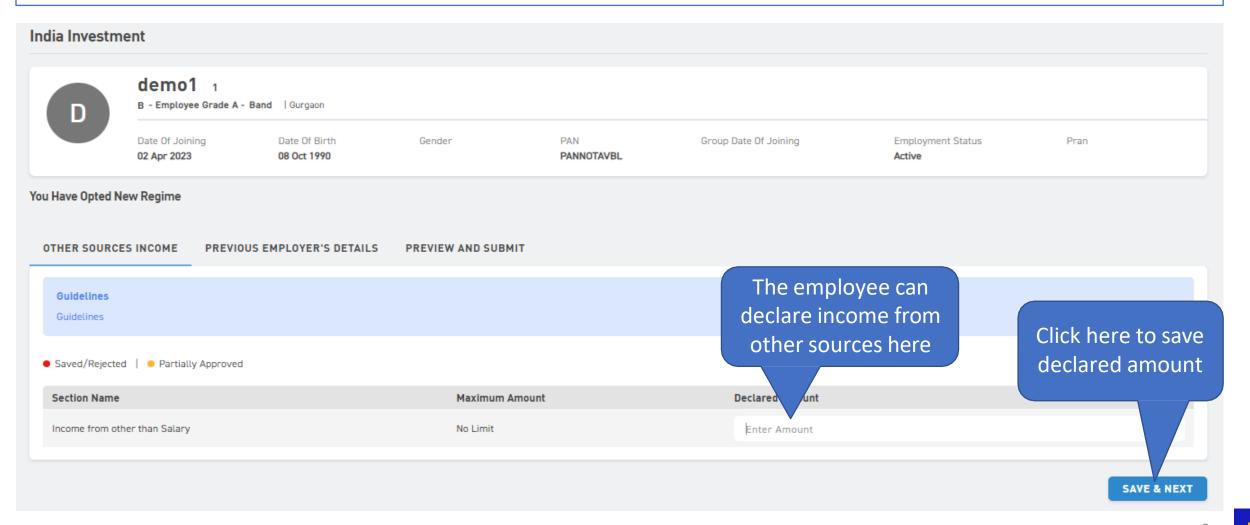
Employees have the option to select a tax regime at the time of investment declaration. Once you have opted for Tax Regime then you can not change it in the current financial year.

The new Tax Regime is the default regime for the tax process.



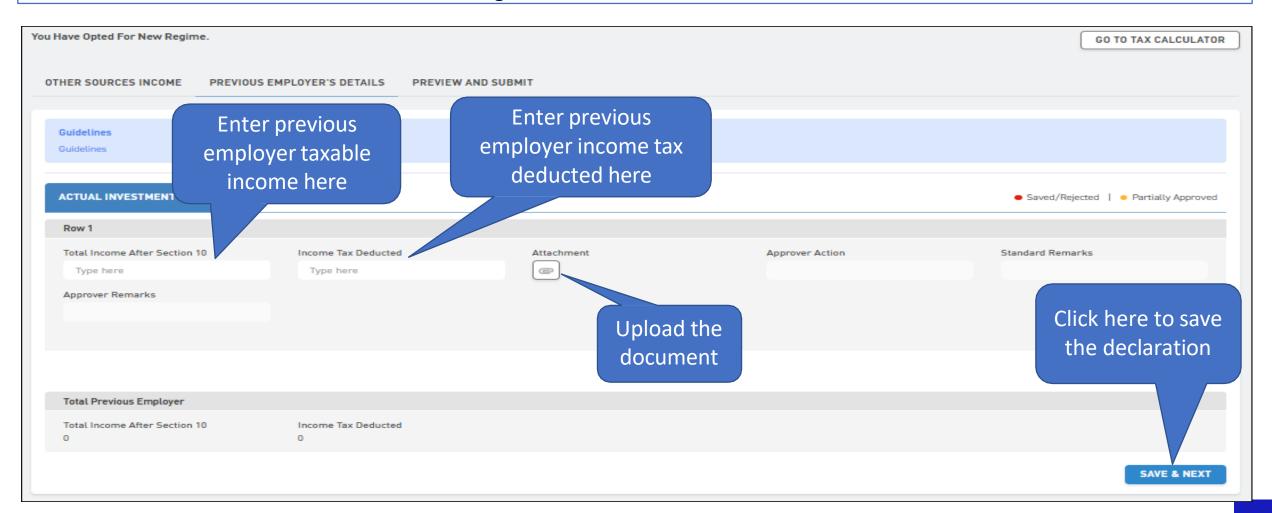
Other Sources Income Section

Employees have the option to declare income from other than salary in the new tax regime. if not want to declare go to the next tab to submit the investment. if not want to declare go to the next tab to submit the investment.

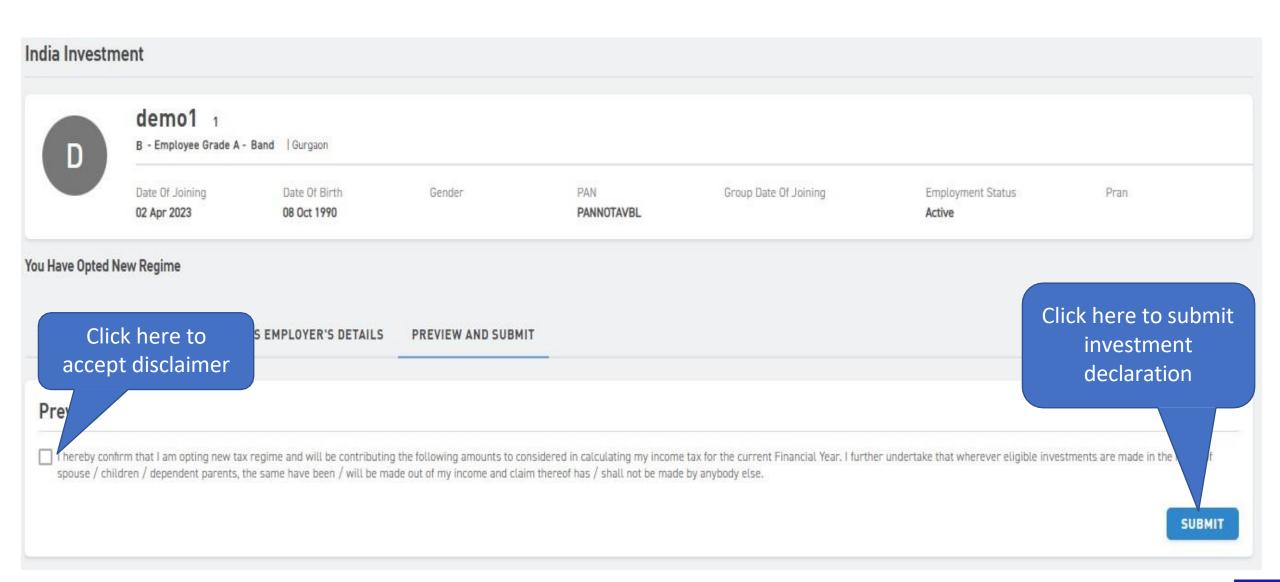


Previous 's Employer Details

If the employee joined in the current financial year, then the employees have the option to declare the previous 's employer income details in this tab. if not want to declare go to the next tab to submit the investment.



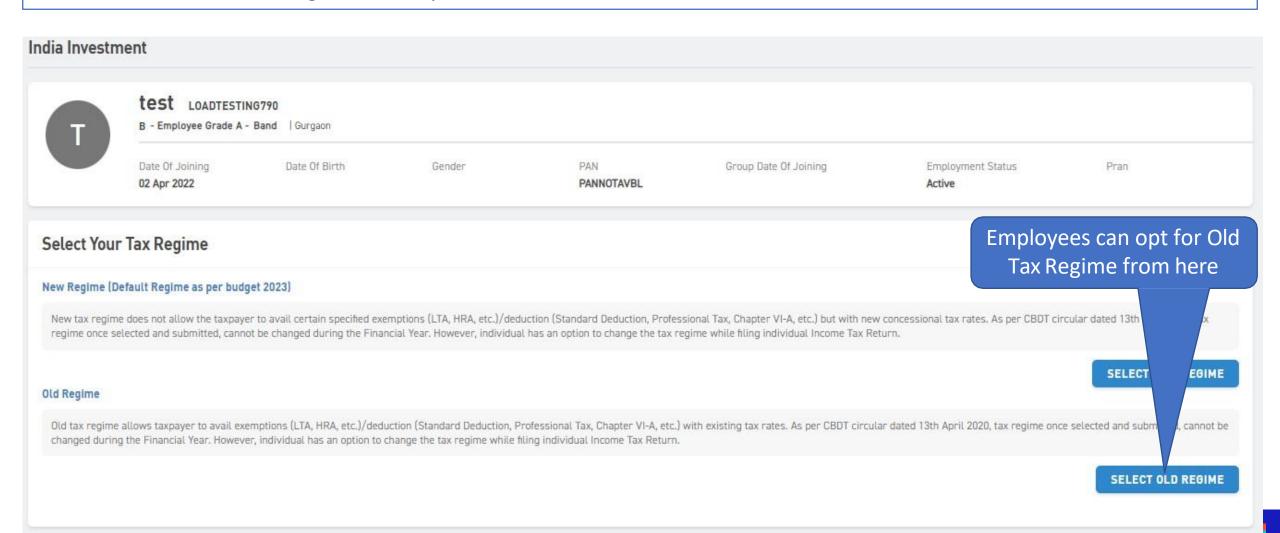
Investment Preview and Submit



Old Tax Regime

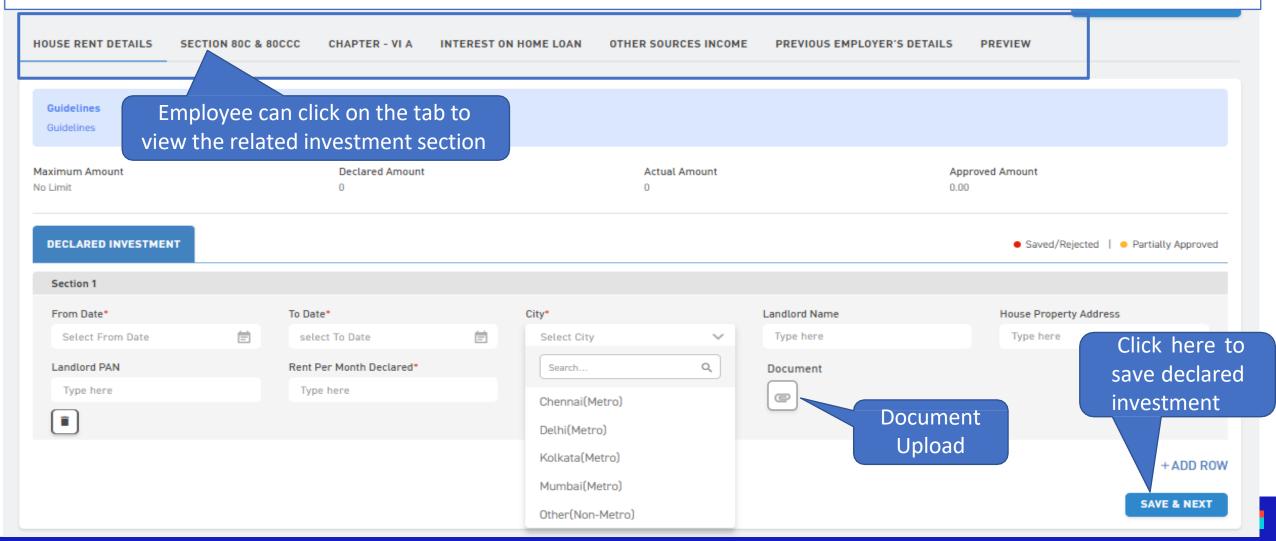
Old Tax Regime

Employees have the option to opt old tax regime where he/she can declare investments under HRA,80C,80CC, Chapter VIA, interest on home Loans and get tax exemption



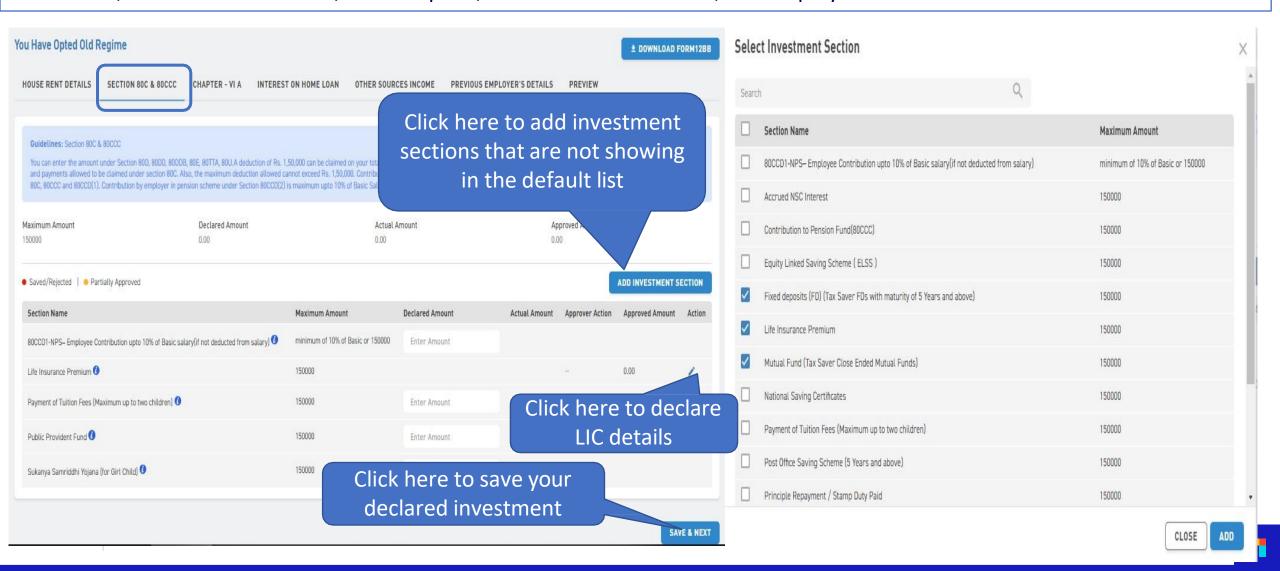
House Rent Declaration

Employees have the option to declare monthly rent amounts along with from date, to date, city, landlord name, address and rent per month amount. If the monthly rent amount is more than Rs.8333 or the annual rent amount is more than 100000 then Landlord PAN is mandatory.



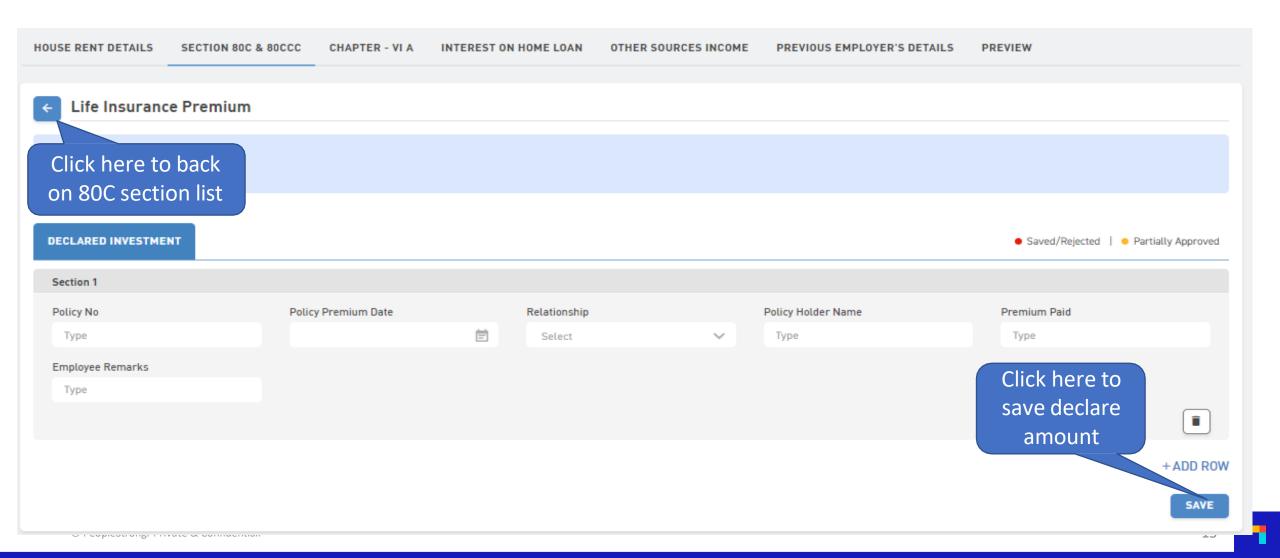
Section 80C & 80CC

Employees have the option to add investment sections which is required to declare investment amounts under section 80C like Tuition Fee, Public Provident fund, Fixed Deposit, Life Insurance Premium, etc. employee can search and add desired section.



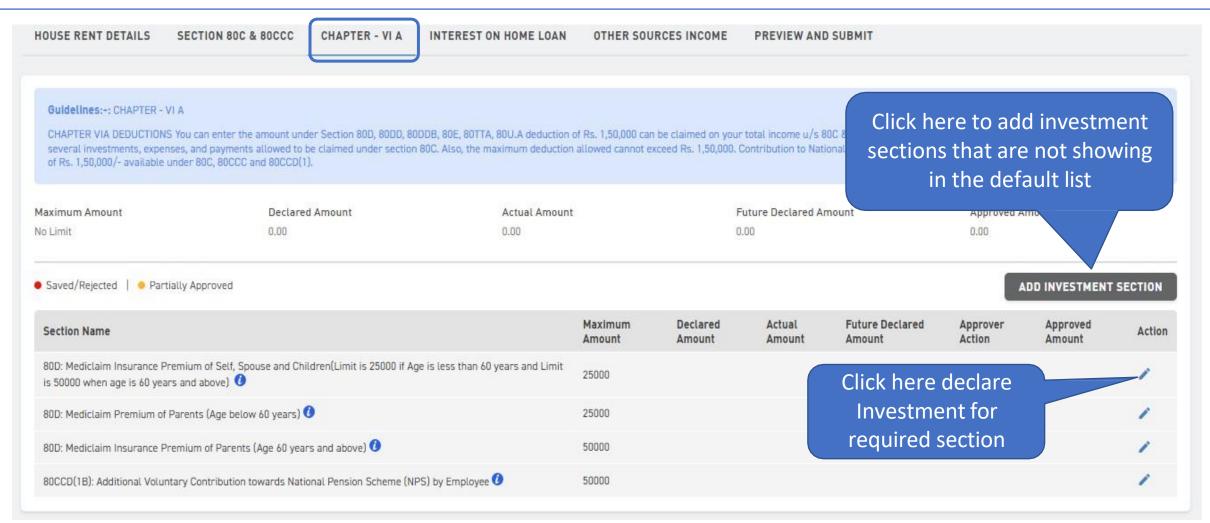
Life Insurance Premium u/s 80C

Employees have the option to click on the action icon in the 80C section list to view the Life Insurance Premium details to declare investment amount.



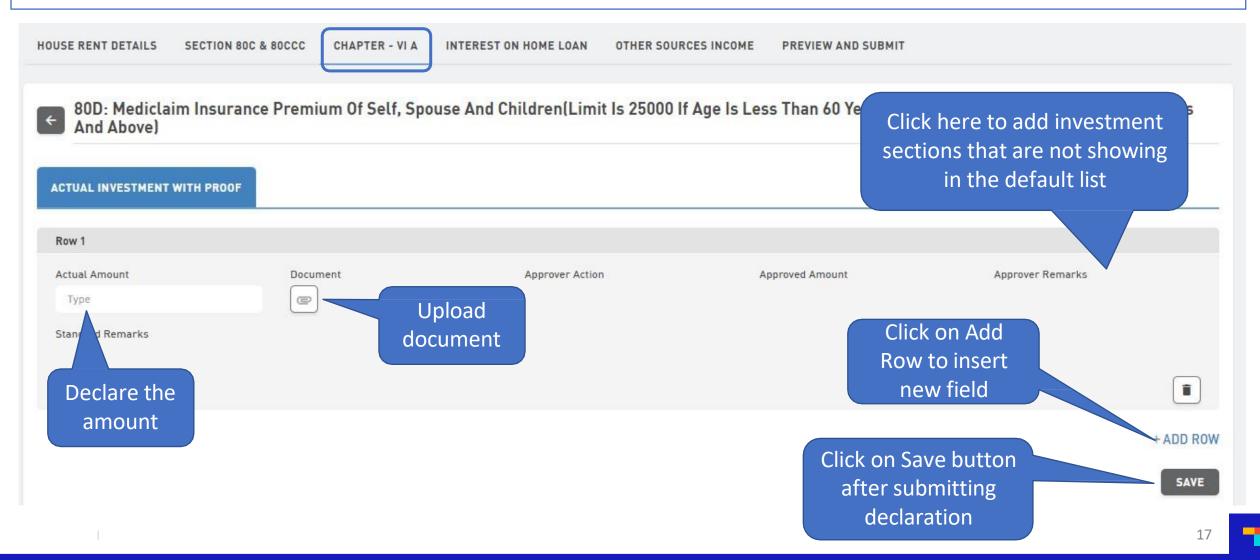
Chapter VI A Investment Sections

Employees have the option to add investment section which is required to declare investment amount under section Chapter VI A like 80D Medical Premium Self & Parent, 80TTA interest on saving bank, NPS 80CCD(1B), 80U, 80DD, 80DDB etc.



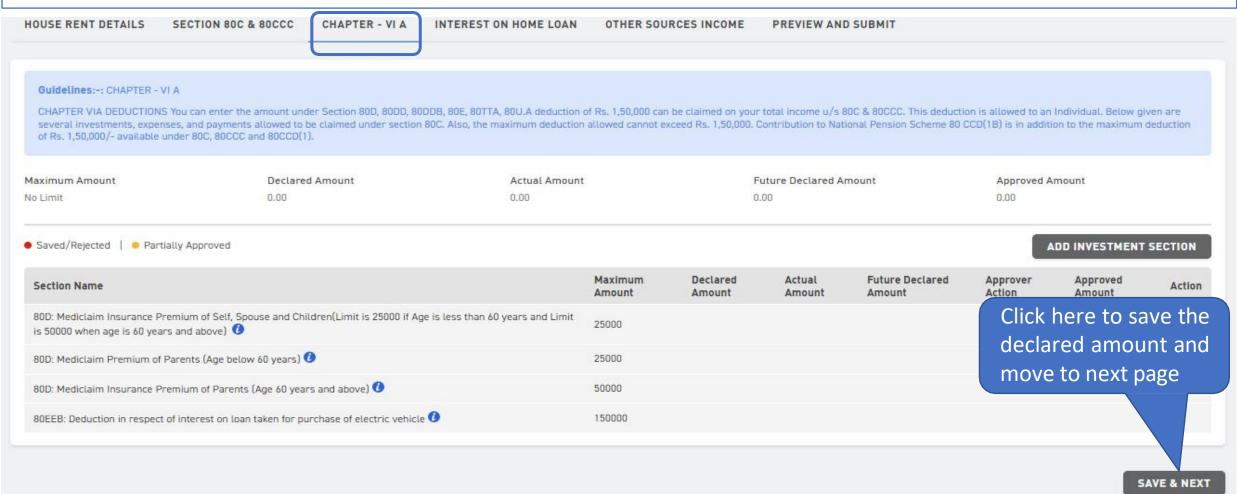
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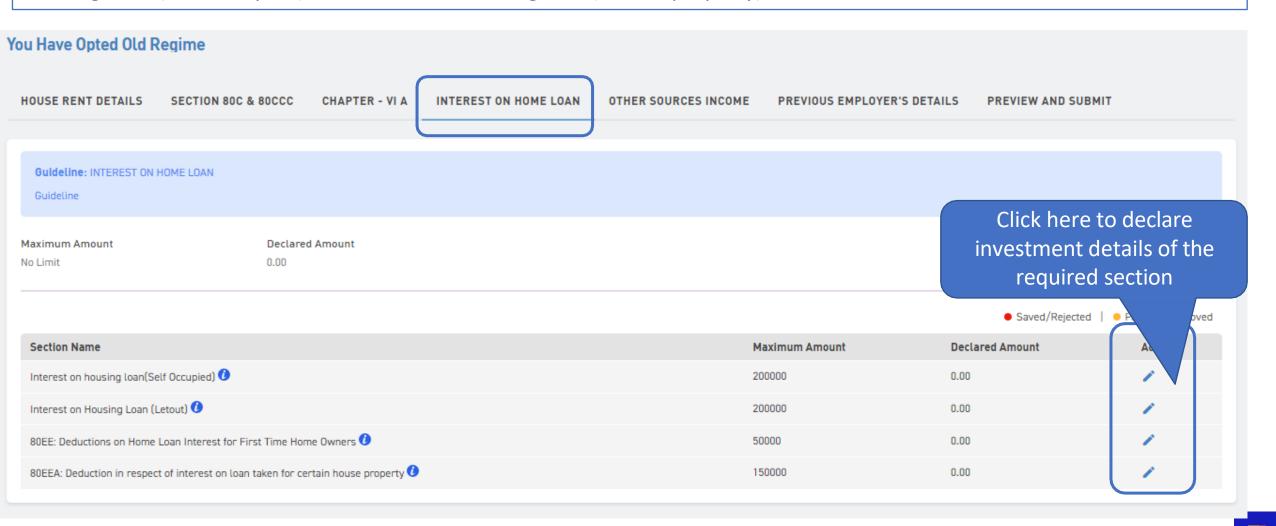
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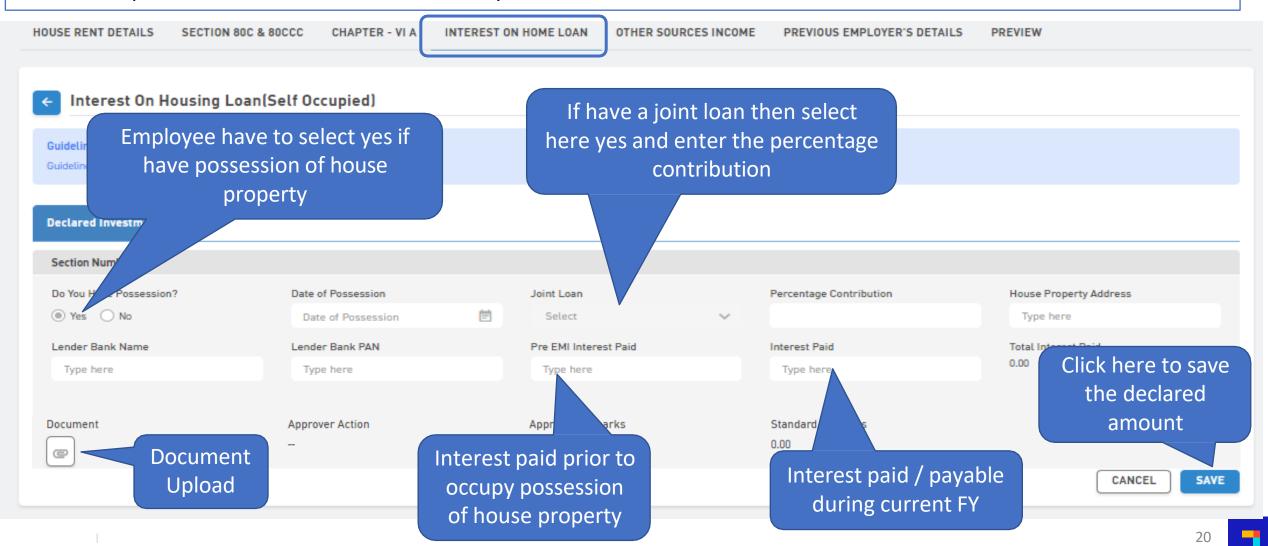
Interest on Home Loan Sections

Employee have option to declared investment amount under Interest on Home Loan section in 80EE, 80EEA, Interest on Housing Loan (Self Occupied) and Interest on housing loan (Let out property).



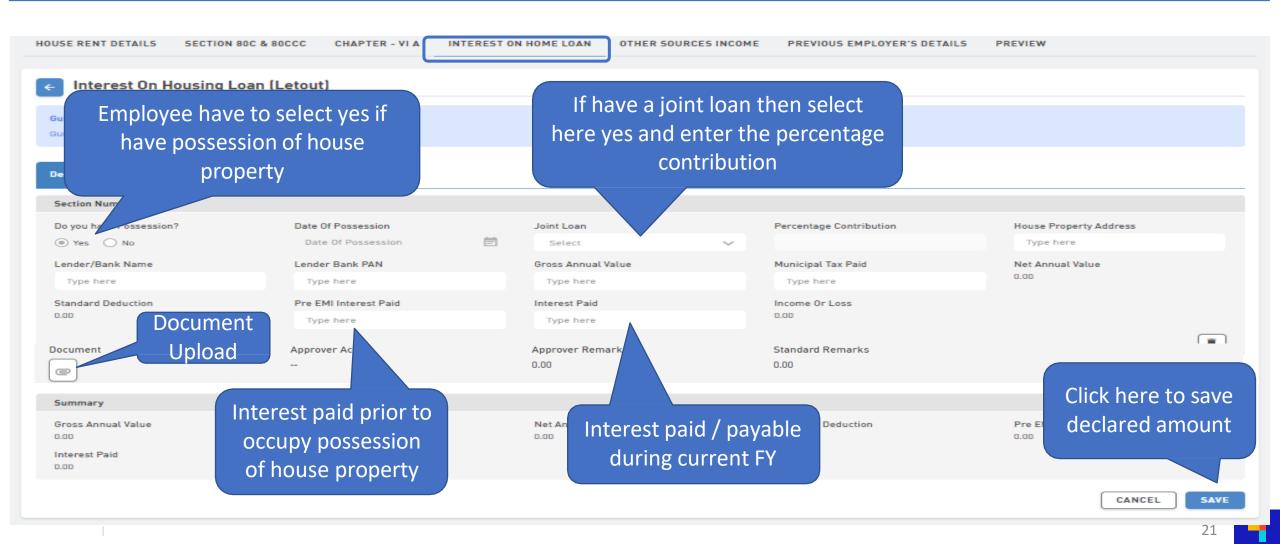
Interest on Housing Loan (Self) Section

If an employee has possession of the self property then he/she can declare interest amount under this section. Employees can declare pre-EMI interest amount and current-year interest amount in this section.



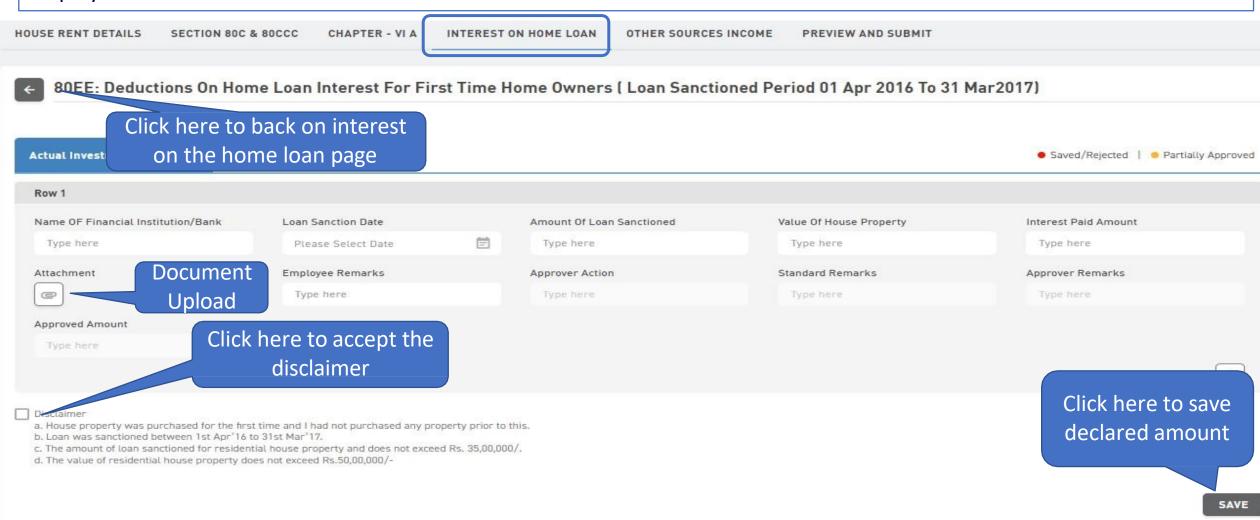
Interest on Housing Loan (Let out) Section

If an employee has possession of let-out property then he/she can declare let-out property details under this section. Employees can declare multiple let-out property details in this section. The system will auto-calculate income or loss amount.



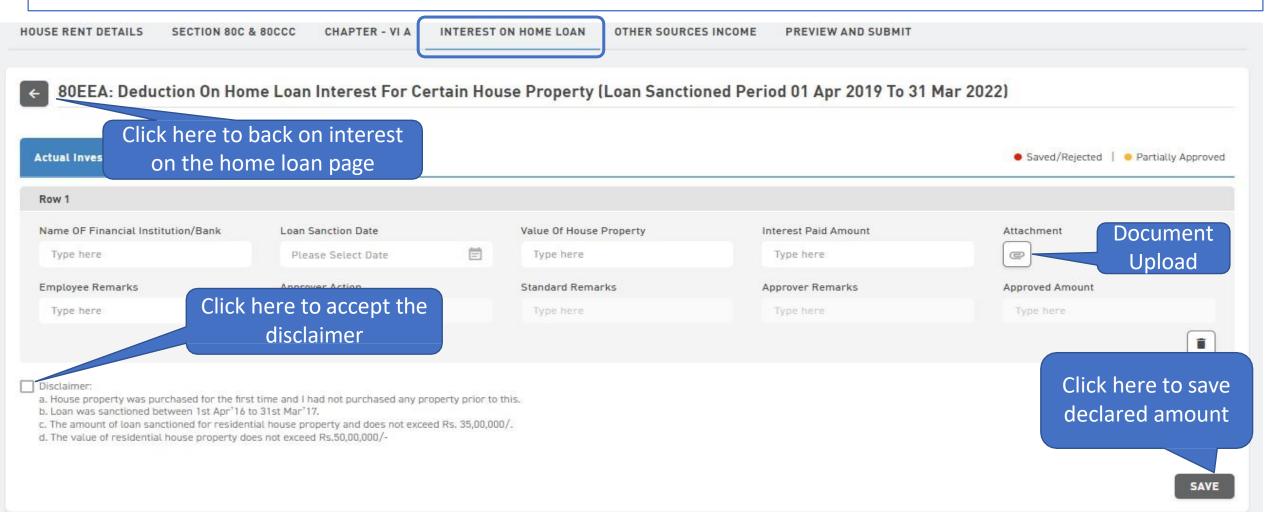
80EE Section

Employees have the option to declare the interest paid amount along with other details under section 80EE section. Employees can declare investment in either 80EE or 80EEA section.



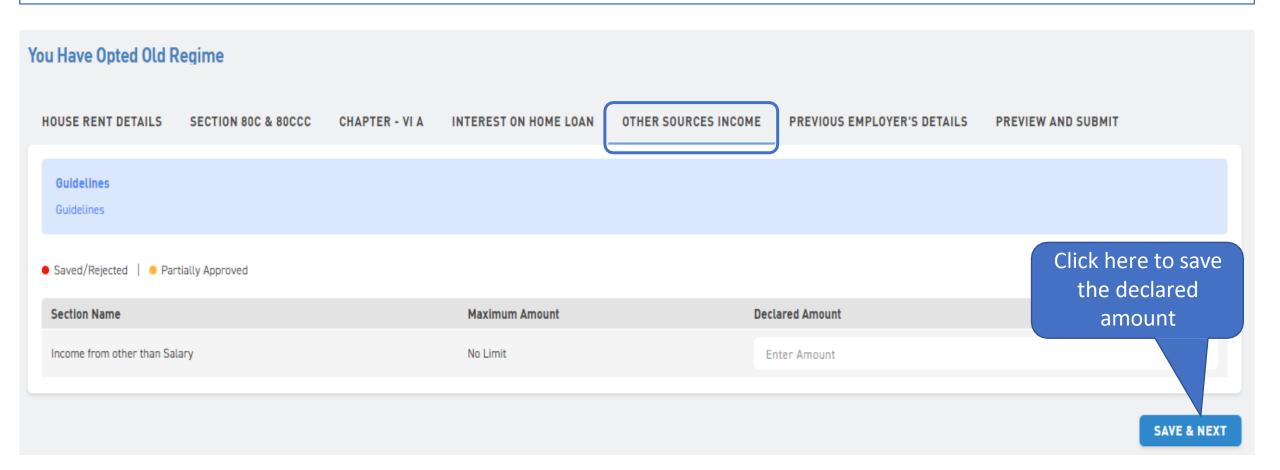
80EEA Section

Employee have option to declare interest paid amount under section 80EEA section. Employee can declare investment either 80EE or 80EEA section.



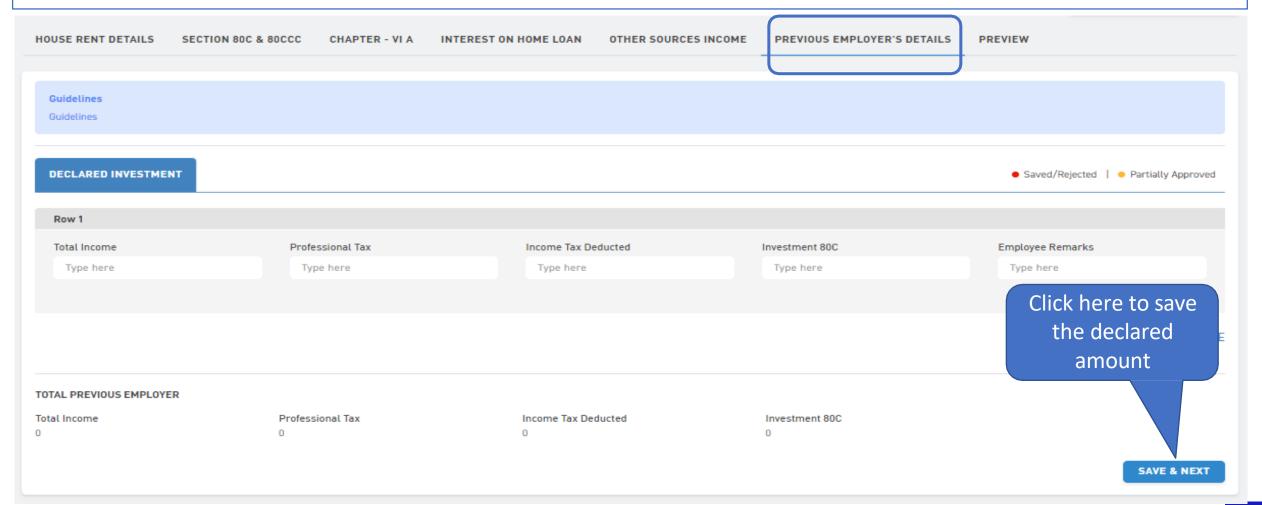
Income from other than salary

Employees have the option to declare income from other than salary in this section and the same will be added in the employee's total taxable salary.



Previous Employer's Details

Employees have the option to declare previous employer income in this section. This section will be applicable for new joiners of the current financial year. The employee can declare previous company total income, professional tax, income tax deducted, 80C investment(PF+VPF).



Preview-Investment Summary

Employees have the option to view the investment summary before submitting his/her investment. The employee must click on submit to consider all declared investments in the tax process.

