

## **Benefits Portal Help Document**

### **Contents**

<b>Scope</b>	2
<b>AUDIENCE</b>	2
<b>USER GUIDE</b>	2
<b>Login Screen</b>	2
<b>Landing Page</b>	3
<b>How to choose Tax Regime</b>	3
<b>For Old tax regime</b>	5
<b>For New tax regime</b>	5
<b>How to choose Flexi Benefits</b>	6

© Speridian | All Rights Reserved.

This document may contain confidential and proprietary information belonging to Speridian.

No part of this document may be disclosed to others or reproduced in any form or by any means, without permission in writing from Speridian.

## Scope

---

Employee Benefits Portal is a portal through which an employee can avail flexi benefits such as Meal Pass Card (Happay), Vehicle Running & Maintenance, and Children's Education Allowance (CEA). This portal gives employees the liberty to choose the benefits so that employee can avail income tax relief.

## AUDIENCE

---

This document is intended for all the employees to help them opt for the different plans as per the tax regime.

## USER GUIDE

---

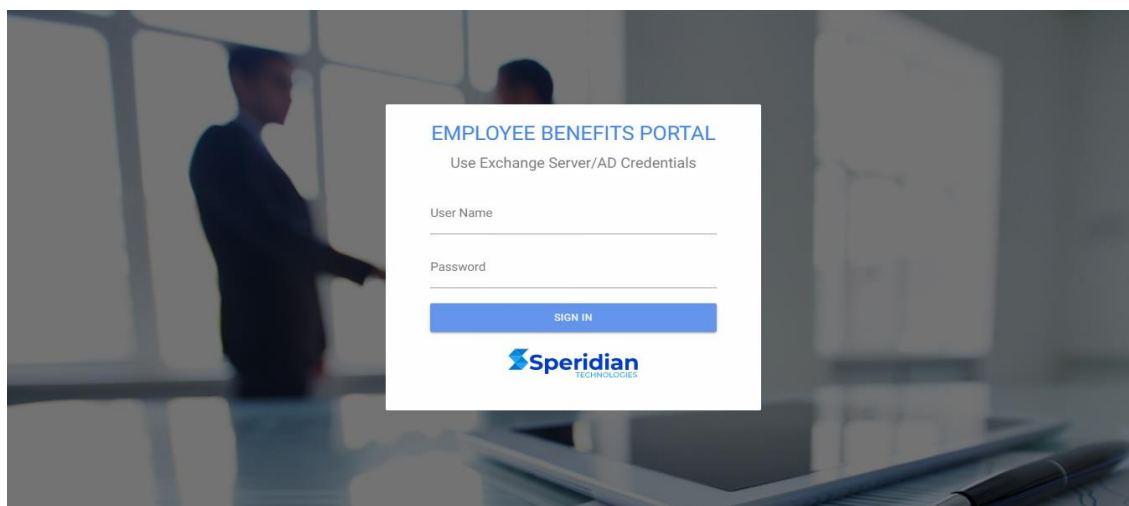
This User Manual provides a detailed description of all the Benefits Portal features. Let's get started!

URL: <https://benefits.speridian.com>

## Login Screen

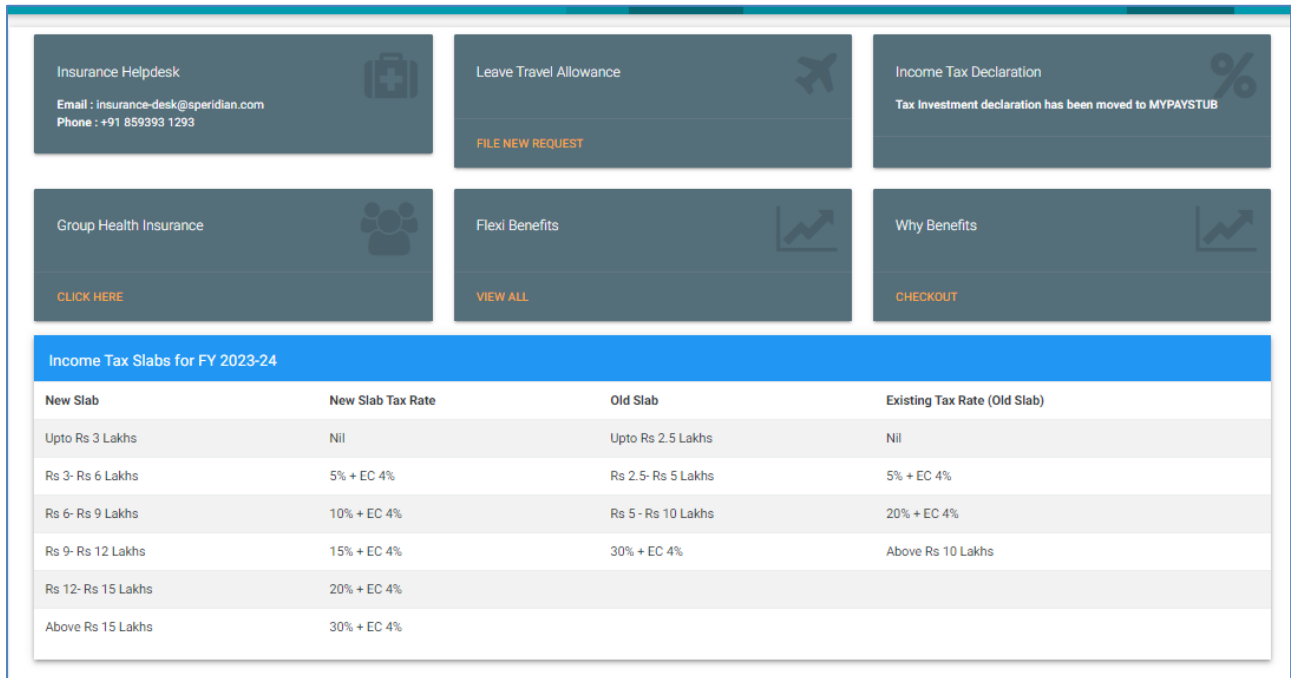
---

When you enter the URL, you will be directed to the Login screen. Use your AD credentials to login.



## Landing Page

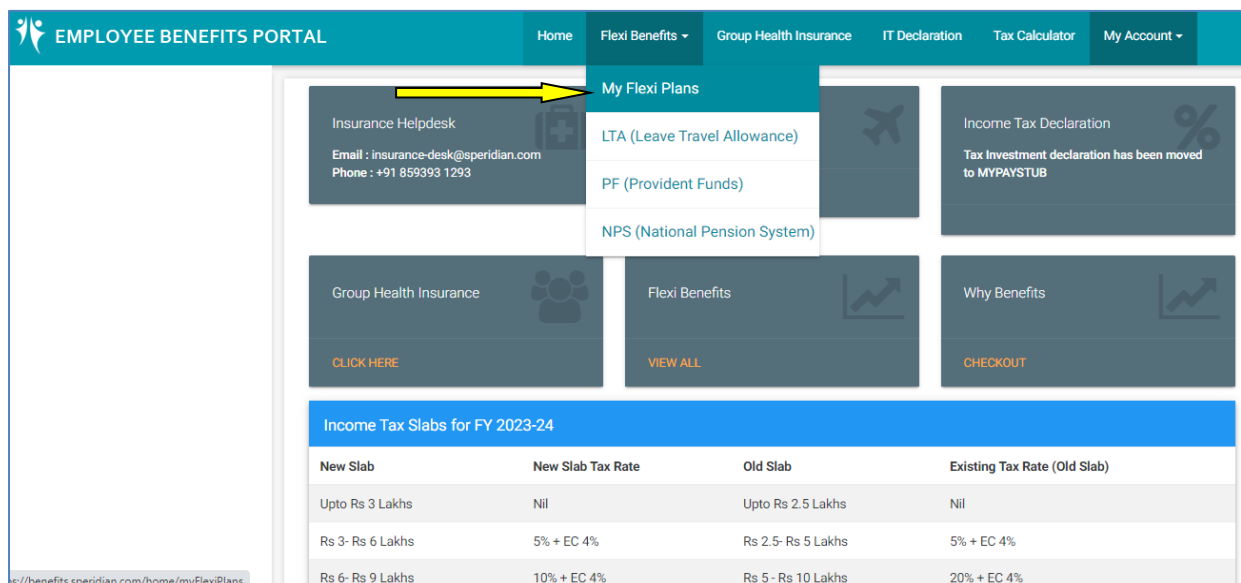
This page displays the Benefits portal.



New Slab	New Slab Tax Rate	Old Slab	Existing Tax Rate (Old Slab)
Upto Rs 3 Lakhs	Nil	Upto Rs 2.5 Lakhs	Nil
Rs 3- Rs 6 Lakhs	5% + EC 4%	Rs 2.5- Rs 5 Lakhs	5% + EC 4%
Rs 6- Rs 9 Lakhs	10% + EC 4%	Rs 5 - Rs 10 Lakhs	20% + EC 4%
Rs 9- Rs 12 Lakhs	15% + EC 4%	30% + EC 4%	Above Rs 10 Lakhs
Rs 12- Rs 15 Lakhs	20% + EC 4%		
Above Rs 15 Lakhs	30% + EC 4%		

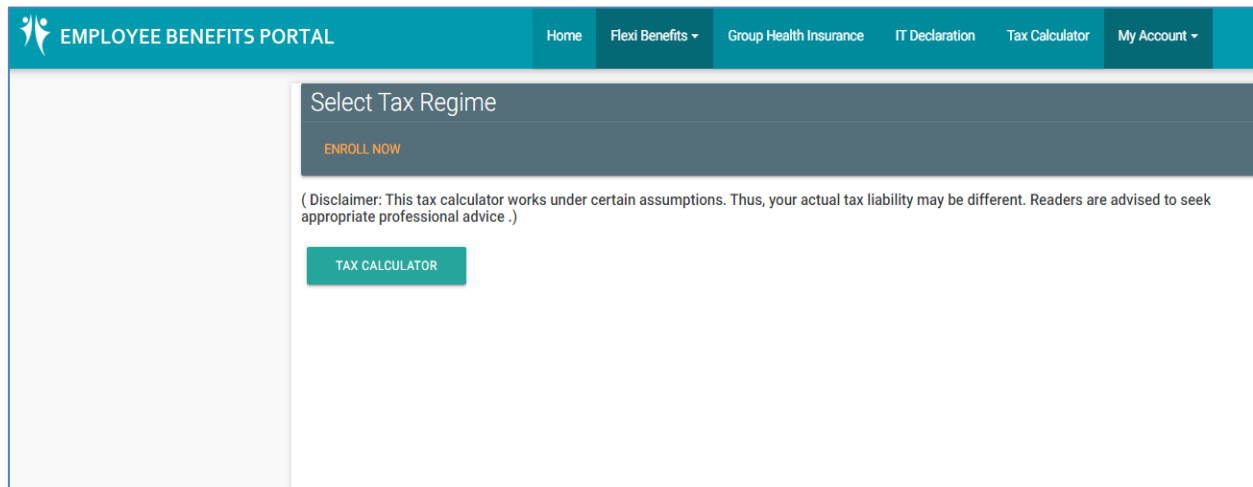
## How to choose Tax Regime

Click on **'Flexi Benefits'** drop down and choose **'My Flexi Plans'**

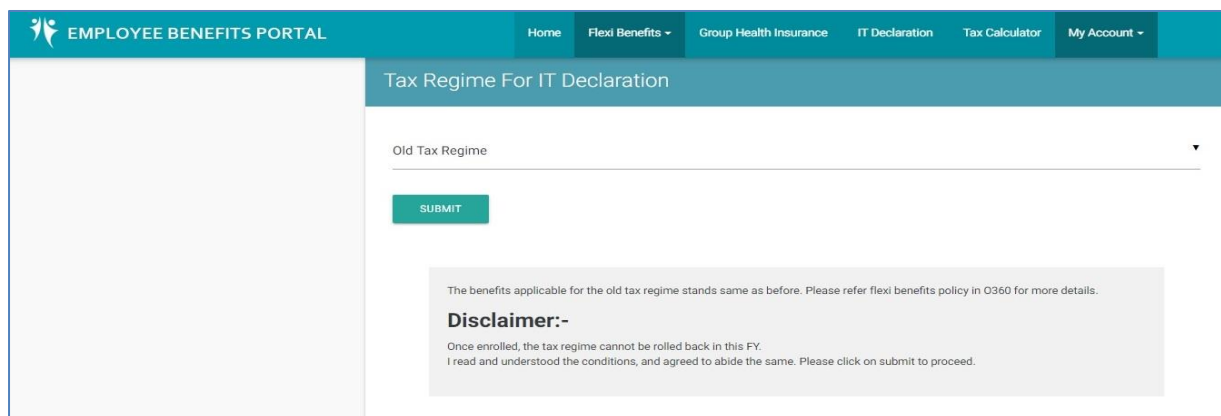


## Select the tax regime

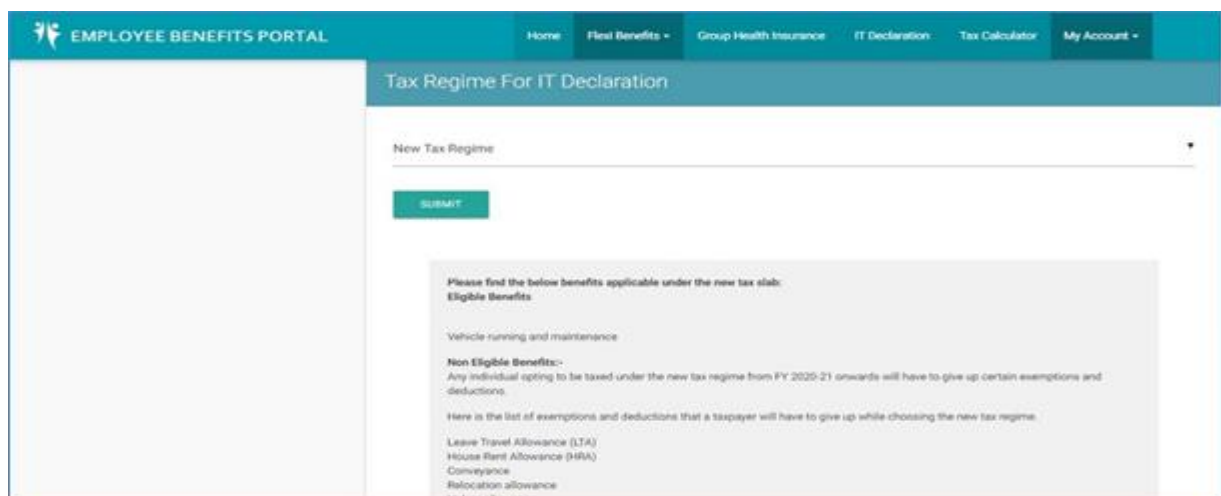
Select the tax regime options available from the drop down button and submit to view your benefits. You can also use the tax calculator option to get indicative tax amount under old/new tax regime.



The screenshot shows the 'EMPLOYEE BENEFITS PORTAL' header with navigation links: Home, Flexi Benefits, Group Health Insurance, IT Declaration, Tax Calculator, and My Account. The main content area is titled 'Select Tax Regime' and features an 'ENROLL NOW' button. Below this is a disclaimer: '( Disclaimer: This tax calculator works under certain assumptions. Thus, your actual tax liability may be different. Readers are advised to seek appropriate professional advice .)'. At the bottom of this section is a 'TAX CALCULATOR' button.



The screenshot shows the 'EMPLOYEE BENEFITS PORTAL' header with navigation links. The main content area is titled 'Tax Regime For IT Declaration'. It features a dropdown menu currently set to 'Old Tax Regime' and a 'SUBMIT' button. Below the button is a disclaimer: 'The benefits applicable for the old tax regime stands same as before. Please refer flexi benefits policy in O360 for more details. **Disclaimer:-** Once enrolled, the tax regime cannot be rolled back in this FY. I read and understood the conditions, and agreed to abide the same. Please click on submit to proceed.'



The screenshot shows the 'EMPLOYEE BENEFITS PORTAL' header with navigation links. The main content area is titled 'Tax Regime For IT Declaration'. It features a dropdown menu currently set to 'New Tax Regime' and a 'SUBMIT' button. Below the button is a list of benefits and disclaimers: 'Please find the below benefits applicable under the new tax slab: **Eligible Benefits** Vehicle running and maintenance **Non Eligible Benefits:-** Any individual opting to be taxed under the new tax regime from FY 2020-21 onwards will have to give up certain exemptions and deductions. Here is the list of exemptions and deductions that a taxpayer will have to give up while choosing the new tax regime. Leave Travel Allowance (LTA) House Rent Allowance (HRA) Conveyance Relocation allowance Helper allowance'.

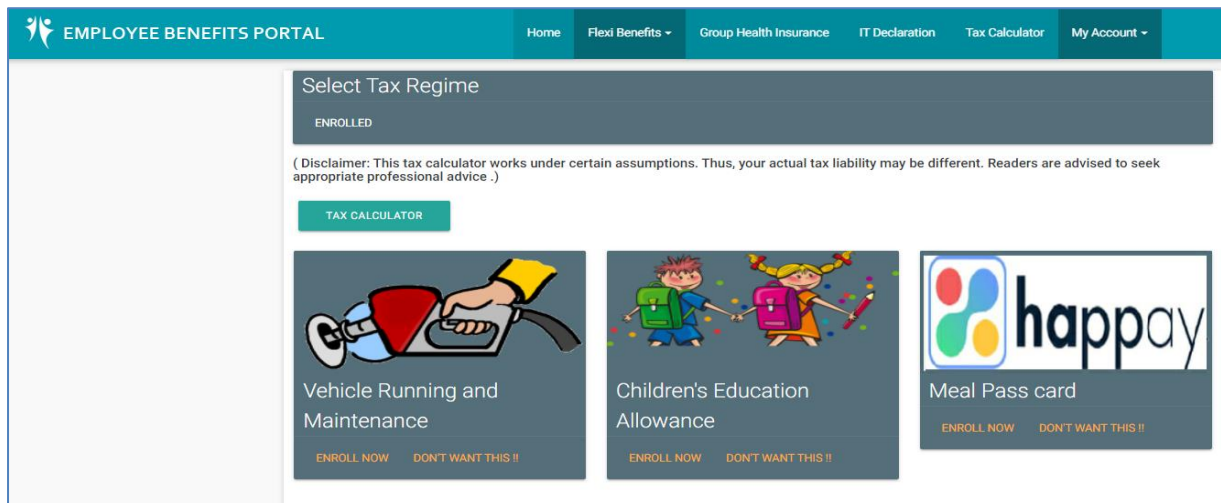
The three flexi benefit plans are displayed named **‘Happy Meal Card’**,

## 'Vehicle Running and Maintenance' and 'Children Education Allowance'.

The user can either opt or not opt for the benefits.

Note: Vehicle Running and Maintenance and Children Education Allowance will be visible only for eligible employees and based of tax regime selection (refer flexi benefits policy for eligibility criteria).

## For Old tax regime



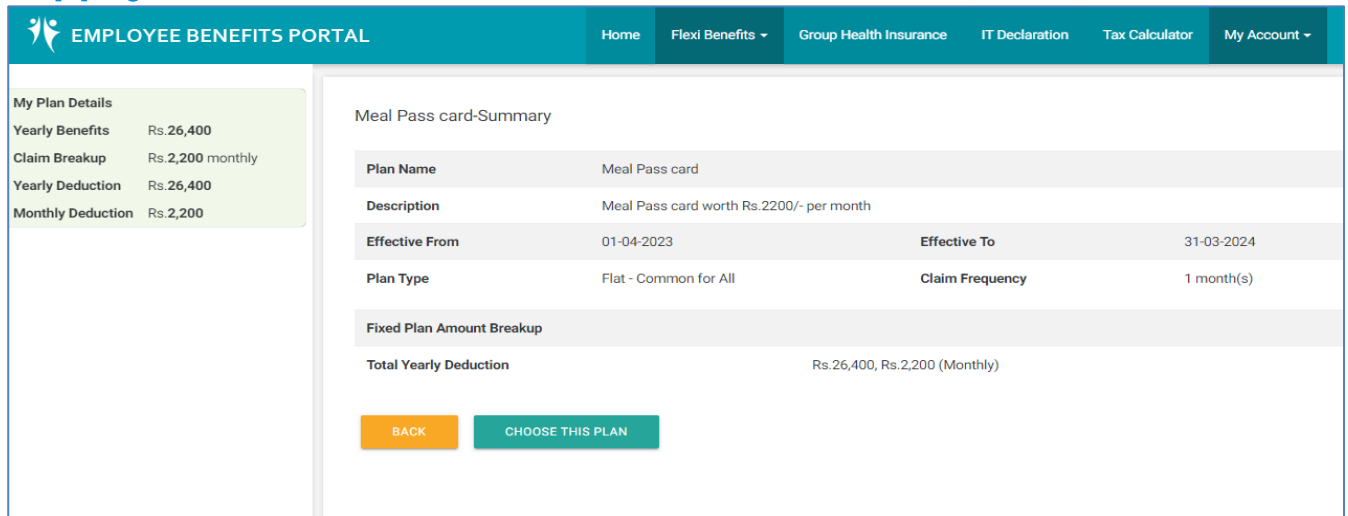
## For New tax regime



When the user click on **‘Enroll Now’** button, the details of the flexi benefit plans are displayed as below:

## How to choose Flexi Benefits

### Happay Meal Pass Card



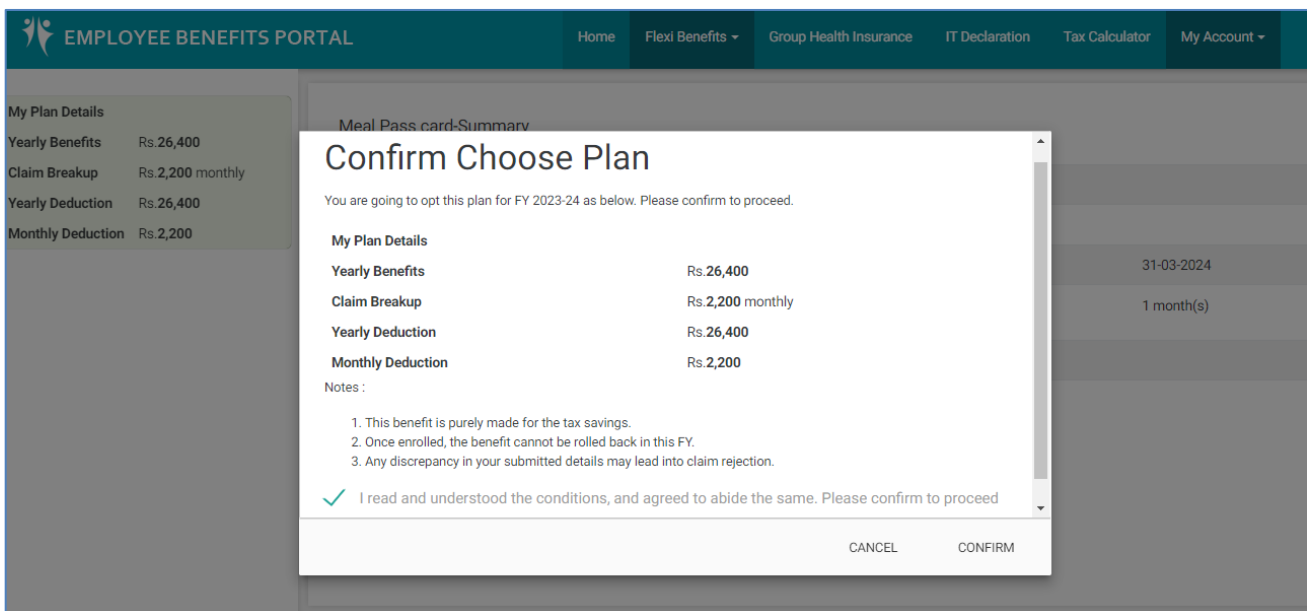
The screenshot shows the 'EMPLOYEE BENEFITS PORTAL' with a teal header. The navigation bar includes 'Home', 'Flexi Benefits', 'Group Health Insurance', 'IT Declaration', 'Tax Calculator', and 'My Account'. On the left, a sidebar titled 'My Plan Details' lists: Yearly Benefits (Rs.26,400), Claim Breakup (Rs.2,200 monthly), Yearly Deduction (Rs.26,400), and Monthly Deduction (Rs.2,200). The main content area is titled 'Meal Pass card-Summary' and contains a table with the following details:

Plan Name	Meal Pass card		
Description	Meal Pass card worth Rs.2200/- per month		
Effective From	01-04-2023	Effective To	31-03-2024
Plan Type	Flat - Common for All	Claim Frequency	1 month(s)
Fixed Plan Amount Breakup			
Total Yearly Deduction		Rs.26,400, Rs.2,200 (Monthly)	

At the bottom of the summary, there are two buttons: 'BACK' (orange) and 'CHOOSE THIS PLAN' (teal).

Click on **‘CHOOSE THIS PLAN’**

A pop-up window appears to confirm the selection.



The screenshot shows the same portal as before, but with a 'Confirm Choose Plan' pop-up window in the center. The window has a title bar and contains the following text:

**Confirm Choose Plan**

You are going to opt this plan for FY 2023-24 as below. Please confirm to proceed.

**My Plan Details**

Yearly Benefits	Rs.26,400
Claim Breakup	Rs.2,200 monthly
Yearly Deduction	Rs.26,400
Monthly Deduction	Rs.2,200

**Notes :**

1. This benefit is purely made for the tax savings.
2. Once enrolled, the benefit cannot be rolled back in this FY.
3. Any discrepancy in your submitted details may lead into claim rejection.

☒ I read and understood the conditions, and agreed to abide the same. Please confirm to proceed

CANCEL CONFIRM

Click on **‘CONFIRM’** after going through the notes and tick mark the declaration.

The status will be displayed as follows, and will be able to view details on approval:



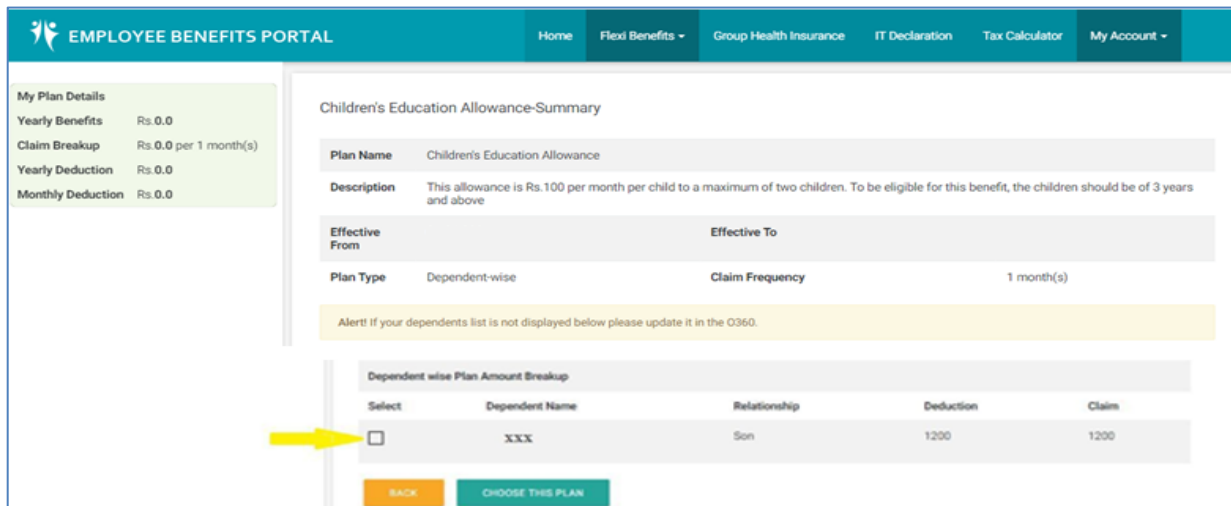
## Children Education Allowance

For opting this benefit you need to add your dependent (child above 3 years) in O360 first and get it approved by HR (User guide attached).

Opt your dependent from the dependent list and click on **'CHOOSE THIS PLAN'**

Deduction details for the plan will be visible on selecting the dependent

A pop-up window appears to confirm the selection



**EMPLOYEE BENEFITS PORTAL** | Home | Flexi Benefits | Group Health Insurance | IT Declaration | Tax Calculator | My Account

**My Plan Details**

Yearly Benefits	Rs. 0.0
Claim Breakup	Rs. 0.0 per 1 month(s)
Yearly Deduction	Rs. 0.0
Monthly Deduction	Rs. 0.0

**Children's Education Allowance-Summary**

**Plan Name:** Children's Education Allowance

**Description:** This allowance is Rs.100 per month per child to a maximum of two children. To be eligible for this benefit, the children should be of 3 years and above

**Effective From:**      **Effective To:**

**Plan Type:** Dependent-wise      **Claim Frequency:** 1 month(s)

**Alert!** If your dependents list is not displayed below please update it in the O360.

**Dependent wise Plan Amount Breakup**

Select	Dependent Name	Relationship	Deduction	Claim
<input type="checkbox"/>	XXX	Son	1200	1200

**BACK**      **CHOOSE THIS PLAN**

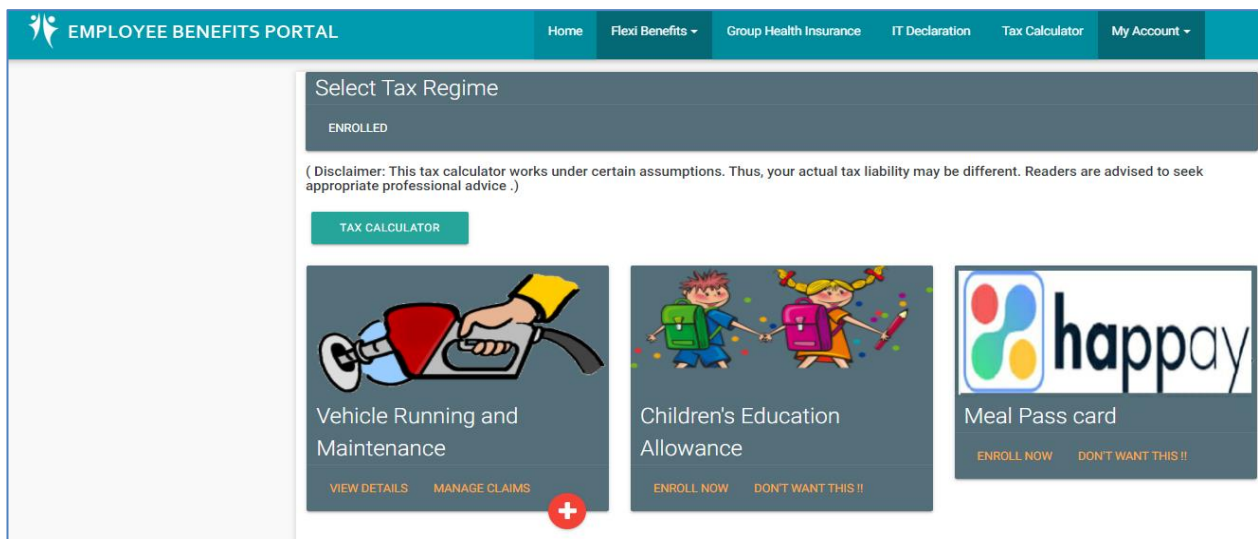
Click on **'CONFIRM'** after going through the notes and tick mark the declaration. The status will be displayed as follows, and will be able to view details on approval.



## Vehicle Running and Maintenance

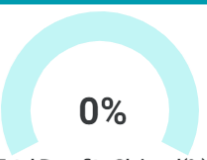
### Existing users (Only visible for eligible employees as per the policy)

Resources those who have already enrolled vehicle reimbursement module will be able to view details directly without adding RC book details afresh.



If in case of any of any changes in RC book or if you want to opt out the plan then kindly click on Benefits SPOC in view details to write an email to benefits team for the changes in the plan.





0%

Total Benefits Claimed(%)

EMPLOYEE BENEFITS PORTAL

Home Flexi Benefits Group Health Insurance IT Declaration Tax Calculator My Account

Claim Details

Total Claims Submitted	0	Approved	0	Rejected	0	Pending	0
	Rs.0		Rs.0		Rs.0		Rs.0

Maximum Deduction	Rs.21,600	Maximum Claim	Rs.21,600
Total Amount Deducted	Rs.0	Total Amount Claimed	Rs.0
Claim %	0%		

Additional Detail(s)

Vehicle Registration No.

Owner's Name as per RC

For any changes in RC book details or if you want to opt out the plan, please write email to : [Benefits SPOC](#)

BACK

## New users (Only visible for eligible employees as per the policy)

Click on **'Enroll Now'** button



Plan details will be shown as per the eligibility before you enter your details:

Details required for the enrollment is shown on the same page as below. Enter the following details:

- Vehicle number
- Owner name
- Secondary vehicle (if any)
- For approval, click on Benefits SPOC to send you RC book via email.

**My Plan Details**  
 Yearly Benefits Rs.21,600  
 Claim Breakup Rs.5,400 quarterly  
 Yearly Deduction Rs.21,600  
 Monthly Deduction Rs.1,800

### Vehicle Running and Maintenance-Summary

<b>Plan Name</b>	Vehicle Running and Maintenance		
<b>Description</b>	Employees can claim reimbursements on expenditure incurred by them on fuel, maintenance, insurance, etc. on his/her own vehicle. Under this provision, the assumption is that the vehicle is used partly for official duties and partly for personal purpose by employee. To avail this benefit, vehicle should be in the name of employee.		
<b>Effective From</b>	01-04-2023	<b>Effective To</b>	31-03-2024
<b>Plan Type</b>	Band-wise	<b>Claim Frequency</b>	3 month(s)

**Band-wise Plan Amount Breakup**

	Rs. 21600	Rs. 5400 per 3 month(s)
--	-----------	-------------------------

**Mandatory Fields**  
 Vehicle Registration No.

Enter the mandatory details and confirm the submission as below:

**EMPLOYEE BENEFITS PORTAL**
Home Flexi Benefits Group Health Insurance IT Declaration Tax Calculator My Account

7C Rs. 21600 Rs. 5400 per 3 month(s)

**My Plan Details**  
 Yearly Benefits Rs.21,600  
 Claim Breakup Rs.5,400 quarterly  
 Yearly Deduction Rs.21,600  
 Monthly Deduction Rs.1,800

### Confirm Choose Plan

You are going to opt this plan for FY 2023-24 as below. Please confirm to proceed.

<b>My Plan Details</b>	
<b>Yearly Benefits</b>	Rs.21,600
<b>Claim Breakup</b>	Rs.5,400 quarterly
<b>Yearly Deduction</b>	Rs.21,600
<b>Monthly Deduction</b>	Rs.1,800

Notes :

1. This benefit is purely made for the tax savings.
2. Once enrolled, the benefit cannot be rolled back in this FY.
3. Any discrepancy in your submitted details may lead into claim rejection.


CANCEL CONFIRM


## Opting out the flexi benefits


Click on **'DON'T WANT THIS'**

**EMPLOYEE BENEFITS PORTAL**
Home Flexi Benefits Group Health Insurance IT Declaration Tax Calculator My Account

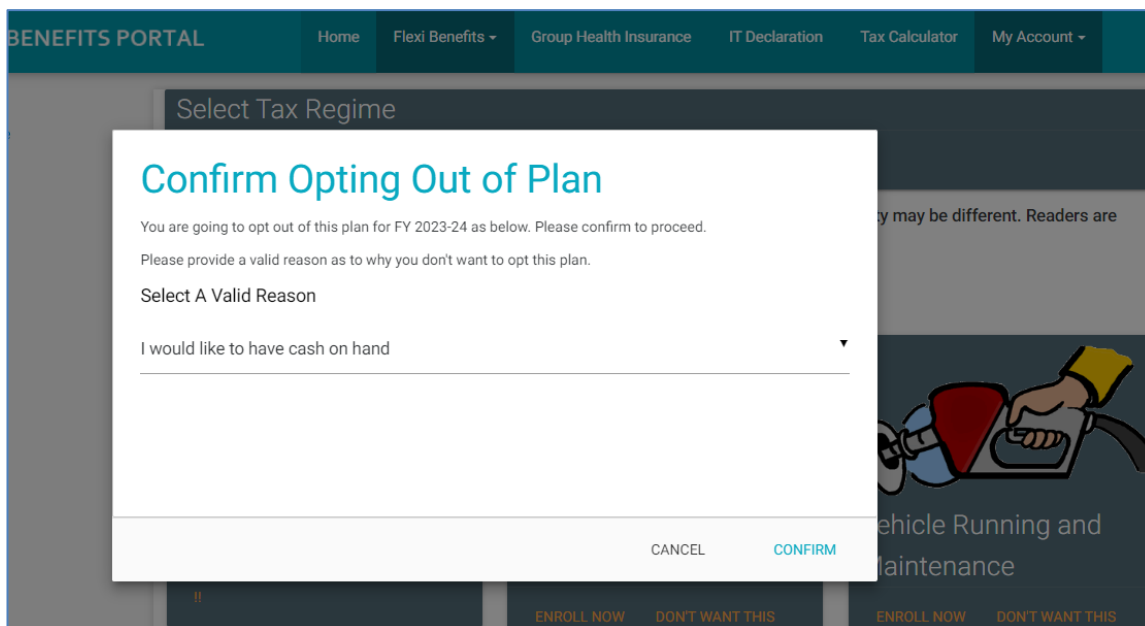
Select Tax Regime  
 ENROLLED


 Vehicle Running and Maintenance  
 ENROLLED


 Children's Education Allowance  
 ENROLL NOW DON'T WANT THIS !!


 Meal Pass card  
 ENROLLED

A pop-up window appears to confirm the opting out of plan.

A screenshot of a web application showing a 'Confirm Opting Out of Plan' modal. The modal has a title 'Confirm Opting Out of Plan' in blue. Below the title, it says 'You are going to opt out of this plan for FY 2023-24 as below. Please confirm to proceed.' and 'Please provide a valid reason as to why you don't want to opt this plan.' There is a section 'Select A Valid Reason' with a dropdown menu showing 'I would like to have cash on hand'. At the bottom of the modal are 'CANCEL' and 'CONFIRM' buttons. The background shows a 'BENEFITS PORTAL' header with navigation links like 'Home', 'Flexi Benefits', 'Group Health Insurance', etc., and a 'Select Tax Regime' section.

**NOTE:** The user should select a valid reason to opt out from the selected plan.

Click on '**Confirm**' button.

**Happy Enrollment!!!!**