

Online Investment Proof Submission Form (IPSF) Walkthrough 2018-2019

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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**

➤ **IPSF 2018-2019**

Click here

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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 (80U)
- ☒ Rajiv Gandhi Equity Savings Scheme (80CCG)
- ☒ Medical Treatment of Specified Diseases (80DDB)
- ☒ Additional NPS Employee Contribution(80CCD1B)

Section C - Chapter VIA - Section 80C

- ☒ Contribution to Pension Fund (80CCC)
- ☒ Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) 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

Section G - Other Income

- ☒ 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 (80U)

☒ Rajiv Gandhi Equity Savings Scheme (80CCD)

☒ Medical Treatment of Specified Diseases (80C)

☒ Additional NPS Employee Contribution (80CCD)

Section C - Chapter VIA - Section 80C

☒ Contribution to Pension Fund (80CCD)

☒ Life Insurance Premium (Jeevan)

☒ 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

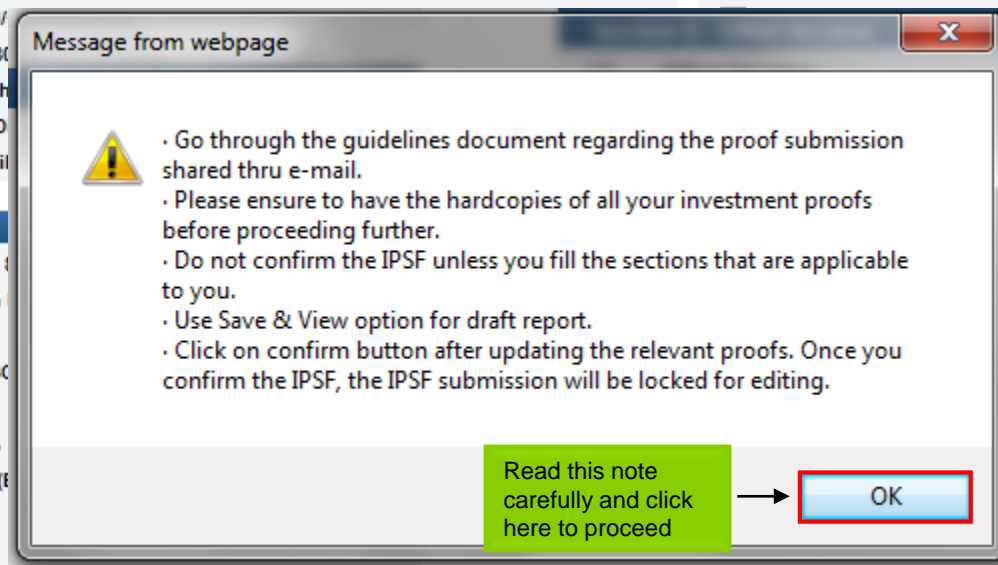
☒ Loss from House Property - SELF OCCUPIED

☒ Loss from House Property - LETOUT

Section E - Previous Employer Details

☒ Previous Employer Details

Section G - Other Income



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 \(SEC80U\)](#)
- [Rajiv Gandhi Equity Savings Scheme \(80CCG\)](#)
- [Medical Treatment of Specified Diseases \(80DDB\)](#)
- [Additional NPS Employee Contribution](#)
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- [NPS Employee Contribution](#)
- [Sukanya Samriddhi Scheme](#)
- [Term Deposits \(SEC80C\)](#)
- [NSC Interest \(SEC80C\)](#)
- [Housing Loan - Self \(SEC24\)](#)
- [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 2018-2019" 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 2018-2019 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. [Have a Query?](#)

Property Id	From Date * (dd/mm/yyyy)	To Date * (dd/mm/yyyy)	Rent Per Month *	Period Rent	Address *	State *	City *	Other City	Metro
1	01/04/2018	31/03/2019	7400.00	88800.00	No.52, 5th Cross, JP Nagar	KARNATAKA	BANGALORE		N

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

Add New Row
Delete Last Row

Land Lord Details

<div style="border: 1px solid #ccc; padding: 5px;"> Multiple Owners for rent property: <div>1 Yes</div> </div>	Landlord Name: <div>RAJU</div>	Landlord PAN: <div>AGJPD3472A</div>	Landlord Address: <div>No.52, 5th Cross, JP Nagar</div>
<div style="display: flex; justify-content: space-around;"> Add Row Delete Row </div>			

Select Multiple Landlords Yes or No

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

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

Key Points:

- From & To Date must be within 1st April, 2018 to 31st March, 2019
- If you have joined the organization after 1st April, 2018, then your DOJ becomes the 'From Date'
- Delhi, Mumbai, Chennai, & Kolkata are 'Metro' cities

Content Tracker

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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	123456	05/05/2018	Paid	MAHESHA MAHADEVU	Self	37	25000.00	e-Payment	
Preventive Medical Checkup	51445	05/05/2018	Paid	RANI	Mother	78	5000.00	Cheque	123456

[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 : 10

[Previous](#) [Save](#) [Next](#)

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.

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 Date (dd/MM/yyyy)*	Name*	Relationship	Interest Amount*	
01/05/2018	Shakthi. R	Self	135000.00	Delete

Add New Row

Number of supporting documents : 1

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

Save

Next

Key Points:

- Benefit under this section can be claimed for Self only

Rajiv Gandhi Equity Savings Scheme (80CCG)

Rajiv Gandhi Equity Savings Scheme (80CCG)

Fields marked with (*) are mandatory.

Have a Query?

Company or Fund Name *	Date of Purchase* (dd/mm/yyyy)	Name of the Share Holder *	Transaction Number *	Amount Invested *	
Bharat Heavy Electricals L ▾	15/06/2016	Shakthi. R	2	50000.00	Delete

Total invested amount under 80CCG.

Qualifying Amount (50% of invested amt) max Rs.25000

50000.00

25000.00

Add New Row

Note :

- 1) Eligibility Criteria - Assessee must be a new investor
- 2) Never invested in the equities/ never traded in equity derivatives before announcement of 80CCG
- 3) May have demat account but no transaction in equity must have done before announcement of 80CCG

Number of supporting documents : 2

Previous

Save

Next

Note:

- Refer to the next slide for information on Rajiv Gandhi Savings Scheme (80CCG)
- Deduction under this section shall be allowed if the purchase date is within the Financial Year 2015-16 and 2016-17

Rajiv Gandhi Equity Savings Scheme (80CCG) - Guidelines

SECTION	PROOF TO BE SUBMITTED	TAX BENEFIT	FOLLOWING WILL BE DISALLOWED
80CCG(Rajiv Gandhi Equity Savings Scheme)	<p>Copies of A&B</p> <p>A. The Demat account with the details of investments made in:</p> <ol style="list-style-type: none"> 1. Shares given under BSE100 2. Shares given in CNX100 3. Shares of Navratnas, Maharatnas and Miniratnas companies 4. Follow on public offers of above companies 5. IPO(initial public offers) of PSUs. 6. Mutual funds who has invested in above five type of shares shown above. 7. ETF (exchange traded funds) invested money only in 1-5 sr number shown above, <p>B. Copy of Form A - declaration to be submitted by depository participant, or copy of Form B -declaration to be submitted by the new retail investor.</p>	<p>Amount of deduction is at 50% of amount invested in equity shares. However, the amount of deduction under this provision cannot exceed Rs. 25,000</p> <p>The assessee is a new retail investor –</p> <p>a) any individual who has not opened a demat account and has not made any transactions in the derivative segment as on the date of notification of the Scheme;</p> <p>(b) any individual who has opened a demat account before the notification of the Scheme but has not made any transactions in the equity segment or the derivative segment till the date of notification of the Scheme,</p> <p>Deduction under this section shall be allowed if the purchase date is within the Financial Year 2015-16 and 2016-17</p>	<p>Tax Benefit will not be extended, If the gross total income exceeds Rs.12 lakhs;</p> <p>Investment made in companies other the listed.</p> <p>No deduction under this section shall be allowed from the FY 2017-18. However an assessee who has claimed deduction under this section for Assessment Year 2017-18 (FY 2016-17) and earlier Assessment Year shall be allowed deduction under this section till the Assessment Year 2019-20 (FY 2018-19).</p> <p>Hence, deduction under this section shall be allowed if the purchase date is within the Financial Year 2015-16 and 2016-17.</p>

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	
Rakesh ▼	Father	Thalassaemia ▼	80	100000.00	80000.00	0.00	80000	Delete
<div>Add New Row</div>								

Select the specified diseases, as certified by the Specialist

Number of supporting documents : 1

Previous

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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(80CCD1B)

Fields marked with (*) are mandatory.

[Have a Query?](#)

NPS PRAN Number *	Date of Payment* (dd/mm/yyyy)	Name of Account Holder *	Relationship	Amount *	
41256789	01/05/2018	Shakthi. R	Self	25000.00	Delete

Add New Row

Total : 25000.00

Note : 1) Maximum eligibility criteria for Additional NPS Employee Contribution is Rs. 50000/-.

Number of supporting documents : 1

Previous

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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 *	
12345	01/05/2018	Shakthi. R	25000.00	Paid	Quarterly	Delete
12345	01/12/2018	Shakthi. R	25000.00	Future Payment	Quarterly	Delete

Total Amount : 50000.00

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 : 3

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	
41256	01/05/2018	01/05/2018	Paid	Reen	100000.00	10000.00	Half Yearly	No	Delete
41256	01/06/2018	11/12/2018	Future	Reen	100000.00	10000.00	Half Yearly	No	Delete

Total Premium Amount : 20000.00

Add New Row

Summary appears upon saving the LIC premium details

Summary			
Policy #	Sum Assured	Total Premium Amount	Considered for 80C
41256	100000.00	20000.00	20000.00
Total :		20000.00	20000.00

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

Number of supporting documents : 5

Public Provident Fund (PPF)

Public Provident Fund (PPF) (SEC80C)

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	01/05/2018	Reena	Spouse	Paid	5000.00	Delete
123456	01/12/2018	Reena	Spouse	Future	5000.00	Delete

Add New Row

Total : 10000.00

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 : 3

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*	
45712	01/05/2018	Shakthi. R	85000.00	Delete

Add New Row

Total : 85000.00

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

Number of supporting documents : 2

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	01/05/2018	Shakthi. R	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 : 2

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 *	
41256	01/05/2018	Paid ▼	Sony ▼	5500.00	HalfYearly ▼	6	Delete
414256	01/12/2018	Future ▼	Sony ▼	5500.00	HalfYearly ▼	6	Delete

Add New Row

Total Fees Paid : 11000.00

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 : 3

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 of Payment *	
12456	Yes ▾	Apr-18 ▾	Oct-18 ▾	Shakthi. R	4526	15000.00	Paid ▾	Delete
12456	Yes ▾	Nov-18 ▾	Mar-18 ▾	Shakthi. R	4526	15000.00	Future ▾	Delete

Total Amount : 30000.00

Add New Row

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

Number of supporting documents : 2

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 *	
41256	Yes ▼	01/05/2018	01/05/2018	Shakthi. R	4125	12000.00	Paid ▼	Delete
41256	Yes ▼	01/06/2017	11/12/2018	Shakthi. R	4125	12000.00	Future ▼	Delete

Total Amount : 24000.00

Add New Row

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

Number of supporting documents : 2

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*	
41256	01/05/2018	Shakthi. R	24000.00	Half-Yearly	Paid	Delete
41256	01/12/2018	Shakthi. R	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 *	
4125689	01/05/2018	Shakthi. R	Self	25000.00	Delete

Add New Row

Total : 25000.00

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

Number of supporting documents : 2

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 *	
123456	01/05/2018	Adwithi	Daughter	Paid	10000.00	Delete
123456	01/12/2018	Adwithi	Daughter	Future	5000.00	Delete
Add New Row					Total :	15000.00

- Note :**
- 1) 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	01/05/2018	Shakthi. R	15000.00	Delete

Total Amount : 15000.00

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 *	
72356	16/09/2017	Shakthi. R	150000.00	0.00	Delete
Add New Row				Total Interest :	0.00

- 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 : 1

Previous

Save

Next

Key Points:

- Benefit can be claimed for Self only.
- NSC certificate should have been taken on or after April 01, 2013

Content Tracker

Locating the IPSF 2018-2019 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

LOSS FROM HOUSE PROPERTY - SELF OCCUPIED

Fields marked with (*) are mandatory.

Have a Query?

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, 2019; however, Principal can be claimed
- Stamp Duty/Registration charges can be claimed if they are paid in FY 2018-2019
- 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.

Click here to update stamp duty alone

Stamp duty

Housing Loan Repayment Certificate* ☒ Yes ☐ No

Loan Lender/Bank Name* HDFC

PAN of the Lender* ABCPD1425Z

Address of the Lender* Kasturba road, bangalore

Address of the Property* No. 123, 1st main, 2nd Cross

State* KARNATAKA

City* BANGALORE

Loan Sanction Date 15/08/2015 (dd/mm/yyyy)

Purpose of Housing Loan Purchase

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

Loan Sanction Amount

Do you own any other house property ☐ (If Yes, check the box)

Total Interest Paid 4142563.00

Total Principal Paid (Section 80C Benefit) 541263.00

Year Code	Amount	Year Code	Amount
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
2013-2014	0.00	2012-2013	0.00
Total :		0.00	

Loan Type ☒ Single ☐ Joint

Borrower Name	Percentage(%)
GOPAL KRISHNAN PANIKAR	100

Year Code	Amount	Year Code	Amount
2017-2018	0.00	2016-2017	0.00
2015-2016	0.00	2014-2015	0.00
2013-2014	0.00	2012-2013	0.00
Total :		0.00	

Housing Loan Interest & Principal considered for Tax Benefit

Total Interest	Total Principal	Benefit U/S 80EE
200000.00	541263.00	0.00

Note : 1) Maximum eligibility for Housing Loan Self Occupied Property is Rs. 200000/-.

Number of supporting documents : 5

Previous

Save

Clear

Next

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

Rental Income Received for 2018-2019 24000.00

Municipal Tax Paid For the Year 1500.00

Net Annual Value 22500.00

Repair and Maintenance Charges (30%) 6750.00

Loan Type Single

Self Percentage 100

Total Interest Portion 245781.00

/ Loss on House Property -230031.00

Total Loss Amount- 2017-2018 250000.00

loss claimed during the Yr- 2017-2018 200000.00

Carry Forward Amount 2018-2109 50000.00

Total Principal 354250.00

Clear

Total Income / Loss for all Properties -230031.00

Total Principal for all Properties 354250.00

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

Key Points:

- Interest and Pre EMI Interest can be claimed only if the property has been occupied before 31st March, 2019; 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 2018-2019
- Rental income/notional income is mandatory to claim tax benefit under this section

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Locating the IPSF 2018-2019 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
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- Section G Other Income

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Forms & Annexure

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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	ABC company	ASDFP1452T	WETR24563R	01/04/2018	10/04/2018	Delete

Salary Details

Company Name	Earnings (After Sec 10 Exemption) *	Professional Tax*	Taxable salary*	Provident Fund*	Vol. Provident Fund*	Income Tax Deducted in Prev Employer*
ABC company	457892.00	1500.00	74586.00	2500.00	0.00	4500.00
Total :	457892.00	1500.00	74586.00	2500.00	0.00	4500.00

Add New Row

Update Final taxable income after all exemptions and deductions.

Note : 1) Form 12B will be generated based on the data provided which has to be duly signed by the employee without which the same is not considered.

Number of supporting documents : 5

Previous

Save

Next

Key Points:

- The information must pertain from 1st April, 2018 to the Date of Leaving with the previous employer.
- Proofs to be submitted as per guidelines circulated

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Locating the IPSF 2018-2019 Link

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

Section wise Data Entry

- Section A HRA
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- Section G Other Income

IPSF Confirmation

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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 *	
<input type="text" value="NSC Interest"/>	<input type="text"/>	<input type="text" value="0.0"/>	
Bank Interest (excluding interest on savings account) ▼	<input type="text" value="05/05/2018"/>	<input type="text" value="25000.00"/>	Delete
Interest Income to Senior Citizen(Considered as deduction u/s 80TTB upto Rs.50000) ▼	<input type="text" value="05/06/2018"/>	<input type="text" value="60000.00"/>	Delete
Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000) ▼	<input type="text" value="15/08/2018"/>	<input type="text" value="15000.00"/>	Delete

Add New Row

Total :

Note : 1) NSC Interest if any would also be considered under Other Income for Tax Purpose.
2) Deduction u/s 80TTA allowed upto Rs.10000 in respect of Interest on deposits in savings account

Number of supporting documents :

Previous

Save

Next

Key Points:

- NSC Interest will automatically be considered as Other Income.

Content Tracker

Locating the IPSF 2018-2019 Link

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

Section wise Data Entry

- Section A HRA
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IPSF Confirmation

Bar-coded IPSF Report

Forms & Annexure

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IPSF Confirmation Screen

Investment Proofs Submission Form 2018-2019

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
01/04/2018	31/03/2019	8000.00	96000.00	BANGALORE	N	1

Section B - Chapter VI A - Deductions from Total Income

Particulars	Amount
Medical Insurance Premium (U/s 80D)	25000.00
Section B - Total	25000.00

Section C - Chapter VIA - Section 80C

Particulars	Amount
Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc	25000.00
Section C - Total	25000.00

Section D - Housing Loan

Particulars	Interest Amount	Principal Amount
Loss from House Property - SELF OCCUPIED	-30000.0	0.00

Payroll Deduction

Particulars	Amount
Provident Fund	68792.00
Payroll Deduction - Total	68792.00

IPSF Dropping Date (dd/mm/yyyy) 15/12/2018

☒ 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 and View

Confirm and Print

Re-print Report

All your inputs
get consolidated
into one

IPSF Confirmation Process

Investment Proofs Submission Form

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	PAN of Landlord
01/04/2018	31/03/2019	8500.00	94350.00	AMARAVATI	N	ABCPD1234Z

Section C - Chapter VIA - Section 80C

Particulars	Amount
Contribution to Pension	5000.00
Life Insurance Premium	10000.00
Mutual Funds (MF) (SEI)	36000.00
Section C - Total	51000.00

Section E - Provident

Name of Company	Professional Tax	Previous Tax
ABC Company	100.00	1500.00

2. Check the box if you wish to confirm

Provident Fund
Payroll Deduction - Total

☒ 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.

3. Click here if you wish to save and view

Save and View

Confirm and Print

Re-print Report

4. Click here to Confirm and Print

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 2018-2019**” link on the home page under the Year End tab. This must be done before confirming the IPSF.

Content Tracker

Locating the IPSF 2018-2019 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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Printable IPSF



PGBRK

Unique
Barcode



IPSF|8871516100887004201|W11

IPSF ID : 0088700420

Investment Proofs Submission Form for the Year 2016-2017

Employee ID *	Shakthi. R	Gender *	F	Date of Joining	01/09/2016
Name *	Shakthi. R		No. of Children going to School *	0	
PAN *			No. of Children going to Hostel *	0	

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

From Date	To Date	Address	Rent Paid Per Month	Rent Paid Per Year	PAN of Landlord
01/09/2016	31/12/2016	No123, 1st Main, 4th Cross, Banashankar, Bangalore, BANGALORE, KARNATAKA	7550.00	30200.00	
01/01/2017	31/03/2017	No123, 1st Main, 4th Cross, Banashankar, Bangalore, BANGALORE, KARNATAKA	10000.00	30000.00	AFGPT1234J

As Per Last Declaration	Section B - Chapter VI A - Deductions from Total Income	Value of Proof Attached.
0	Medical Insurance Premium (U/s 80D)	12465.00
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	5000.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%	0.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%	125000.00
0	Interest on Educational Loan (U/s 80E)	135000.00
0	Permanent Physical Disability (80U) < 80%	75000.00
0	Permanent Physical Disability Severe Disability (80U) > 80%	0.00
0	Medical Treatment of Specified Diseases (80DDB)	0.00
0	Additional NPS Employee Contribution (80CCD1B)	25000.00
0	Rajiv Gandhi Equity Savings Scheme (80CCG)	25000.00
Section C - Chapter VIA - Section 80C		
0	Contribution to Pension Fund (80CCC)	50000.00
0	Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc	52500.00
0	Public Provident Fund (PPF)	150000.00
0	National Savings Certificate (NSC)	85000.00
0	Infrastructure Bonds	60000.00
0	Children Education Tuition fees	11000.00
0	Equity Linked Savings Scheme (ELSS)	30000.00
0	Mutual Funds	24000.00
0	Unit Linked Insurance Plan	48000.00
0	5 Year Deposit under Senior Citizen Saving Scheme	0.00
0	Cumulative Term Deposits	0.00
0	NPS Employee Contribution	25000.00
0	Sukanya Samridhi Scheme	150000.00
0	5 Year Time Deposit in Post Office	0.00
0	Housing Loan - Principal Amount paid, Registration Fees, Stamp duty	767504.00
0	Fixed Deposit Scheme (Block Period of 5 yrs)	15000.00
0	NSC Interest (Will also be considered as Other Income)	0.00

Section D(a) - Loss from House Property - LETOUT	
0	Loss from House Property - LETOUT
Section D(b) - Loss from House Property - SELF OCCUPIED	
0	Loss from House Property - SELF OCCUPIED
Section E - Previous Employer Details	
0	Salary paid by the Previous Employer
0	Profession Tax deducted by the Previous Employer
0	Income Tax deducted by the Previous Employer
0	Voluntary Provident Fund deducted by the Previous Employer
0	Provident Fund deducted by the Previous Employer
Section G - Other Income	
0	Bank Interest (excluding interest on savings account)
0	Dividend
0	Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000)
0	Pension
0	Others

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...

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:

Place:

Signature
mandatory



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 2018-2019 Link

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Section wise Data Entry

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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)		
1. Name and Address of the Employee	CHANDRAKANTH REDDY BUSANAGARI	
2. Permanent Account Number	ALRPB1544L	
House Property U/s 24	Amount	Amount
(a) Housing Interest paid for 2018-2019 as per certificate		500000
(b) Rental Income / Notional rental income for the year 2018-2019	150000	
(c) Less: Municipal Tax Paid to the authorities	0	
(d) Net Income from House Property (b - c)	150000	
(e) Less: Repairs and Renewals @30% on Net Income of Rs. 150000 (d * 30%)	45000	
(f) Net Actual Income to be set off (d - e)		105000
(g) Net value of Loss / Income for the year (a - f) 2018-2019	(395000.0)	
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 31/03/2019

1. Name and address of the employee	51615
2. Permanent Account No .	ALRP81544L
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 - 2018-2019	
(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)	144444.0
5. Aggregate of sub-items (i) to (iv) of item 4	Total Rs. 144444.00

.....
Signature of the Employee

Verification

I, CHANDRAKANTH REDDY BUSANAGARI , do hereby declare that what is stated above is true to the best of my knowledge and belief.

Verified today, the day of

Declaration for Premium falling due after proof –cut off date

DECLARATION FOR PREMIUMS FALLING DUE AFTER PROOF CUT OFF DATE OF 26-11-2018

Employee ID : 51615

Employee Name : CHANDRAKANTH REDDY BUSANAGARI

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 2018-2019. Please consider these premiums payable for the tax benefit in the current financial year 2018-2019.

Public Provident Fund (PPF)				
Policy #	Expected Date of Payment	Name of Policy Holder	Status of Payment	Premium Amount
986532147	19/11/2018	CHANDRAKANTH REDDY BUSANAGARI	F	2569
Total				2569.00

Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc.					
Policy #	Expected Date of Payment	Name of Policy Holder	sum Assured	Premium Amount(Excluding Late Fee)	Frequency
36985	20/11/2018	PAYAL	25000	250.0	M
Total				250.00	

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 hereby 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 31/03/2019.

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 31/03/2019

Name and address of the employee :

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	ABC company	WETR24563R	ASDFP1452T	153	NA	NA	NA	457892	2500	4500	Professional Tax Rs. 1500

Signature of the Employee

Verification

I, Shakthi. R , 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 :

Permanent Account No. :

Period Year ending

31/03/2019

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 Contd...

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 (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 Contd...

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 CHANDRAKANTH REDDY BUSANAGARI, have gained the ownership/ possession of my house property located at the following address, on 01/04/2017(DD/MM/YYYY).

Address:

delhi

DELHI, DELHI

Loan Lender/ Bank Name: HDFC BANK

Loan Sanction Date : 01/04/2017

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 Contd...

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 CHANDRAKANTH REDDY BUSANAGARI, have gained the ownership/ possession of my house property located at the following address, on 01/04/2017(DD/MM/YYYY).

Address:

DELHI

NEW DELHI, DELHI

Loan Lender/ Bank Name: HDFC BANK

Loan Sanction Date : 01/04/2017

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 5 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 Contd...

FORM NO.128B
(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
2. Permanent Account Number of the employee .
3. Financial year

2018-2019

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.102600 (ii) Name of the landlord Rangan Rangan (iii) Address of the landlord No 123, JC Road, Vellure No 123, JC Road, Vellure (iv) Permanent Account Number of the landlord ABCPD1234Z	Rs.102600	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 (ii) Name of the lender (iii) Address of the lender (iv)Permanent Account Number of the lender (a) Financial Institutions (b) Employer (c) Others	Rs.0.0	Provisional Certificate from Bank/Financial Institution/Lender

Annexure Contd...

4	<p>Deduction under Chapter VI-A</p> <p>(A) Section 80C, 80CCC and 80CCD</p> <p>(i) Section 80C</p> <p>(a) Provident Fund : Rs.31732</p> <p>(b) Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc : Rs.1000</p> <p>(c) Unit Linked Insurance Plan : Rs.5000</p> <p>(d) National Savings Certificate (NSC) : Rs.25000</p> <p>(ii) Section 80CCC :</p> <p>(iii) Section 80CCD :</p> <p>(B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.</p> <p>(a) Interest on Educational Loan (U/s 80E) : Rs.125000</p> <p>(b) Rajiv Gandhi Equity Savings Scheme (80CCG) : Rs.0</p> <p>(c) Permanent Physical Disability (80U) : Rs.75000</p>	Rs. 262732.0	Photocopy of the investment proofs
Verification			
I, VINUTHA , son/daughter of , do hereby certify that the information given above is complete and correct			
Place : BANGALORE			
Date :			
Designation : Bill of Quotations Sr team leader			(Signature of the employee) Full Name: VINUTHA

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. The information submitted above is deemed to be e-signed by the employee.

Annexure Contd...

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

Key Points:

- Any deduction through Payslip 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 2018-2019 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



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 eg:
Correct- “EMPIDIPSF201819.zip”.
Incorrect- “EMPID IPSF 2018 19.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.

III WorkWays Page 1

Print

PSF1719 24450 48739125451 81

All the proofs have to be uploaded using the scan image option using the link "Upload IPSF Proof Images". Any proofs that are uploaded in the IPSF image box will not be accepted. Please ensure to upload all the images of your investment proofs upon the day signed IPSF form. In absence of any, create a PDF file to upload.

Investment Proofs Submission Form for the Year 2018-2019					
Employee ID *	SSN *	First Name *	Last Name *	Phone No *	Mobile No *
123456789	123456789	John	Doe	1234567890	9876543210
DOB *	Address *	City *			
12/31/1980	1234567890	New York			
Section A - Fund Proof for claiming total exemption (Only On your last receipt will be considered)					
Fund Name	To Date	Address	Bank Proof For Month	Bank Proof For Year	State of Location
ABCDEF	12/31/2018	1234567890	1234567890	1234567890	1234567890
Section B - Chapter 13A - Exemptions from Total Exemption					Value of Proof Attached
1. Medical Insurance Premium (12/31/2018)					0.00
2. Medical Insurance Premium (12/31/2018) - Parents not using Section 1792(a)					0.00
3. Medical Insurance Premium (12/31/2018) - Parents using Section 1792(a)					0.00
4. Medical Exemption/Exemption Dependent (12/31/2018) < 80%					0.00
5. Medical Exemption/Exemption Dependent (12/31/2018) > 80%					0.00
6. Interest on Educational Loan (12/31/2018)					0.00
7. Permanent Physical Disability (12/31/2018)					0.00
8. Permanent Physical Disability (12/31/2018) > 80%					0.00
9. Permanent Physical Disability (12/31/2018) > 80%					0.00
10. Single (12/31/2018) Savings (12/31/2018)					0.00
Section C - Chapter 13A - Section 1792(a)					
1. Contributions to Foreign Fund (12/31/2018)					0.00
2. Life Insurance Premium (12/31/2018) - Parents not using Section 1792(a)					123456.78
3. Public Pension Fund (12/31/2018)					123456.78
4. National Savings Certificate (12/31/2018)					0.00
5. State or Educational Tuition Fee					123456.78
6. Family Credit Savings Scheme (12/31/2018)					0.00
7. Mutual Funds					0.00
8. Life Insurance Premium (12/31/2018)					0.00
9. State Deposit under Section 1792(a) Savings Scheme					0.00
10. National Savings Certificate (12/31/2018)					0.00
11. State Savings Deposit in Post Office					0.00
12. State Deposit Scheme (12/31/2018)					0.00
13. State Deposit Scheme (12/31/2018)					0.00
Section D - Other Income					
1. Bank Interest (including interest on savings account)					0.00
2. Interest on Deposits in Savings Account (Considered as Deduction in 12/31/2018)					0.00
3. Other Income					0.00

Declaration
I, the undersigned, declare that I have read and understood the guidelines provided in this form and that all information provided above is true and correct in all respects.
I also undertake to indemnify the company for any loss or liability that may arise, in the event of any incorrect information provided by me.

Signature

Date

Signature of Employee *

* Includes verification fields on all our databases. Please verify the name and if blank, please fill it and submit the form.

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 2018-2019

Upload IPSF Proof Images

IPSF Proofs

This module is used for uploading scanned images of IPSF proofs

Employee ID Employee Name Year Code 2018-2019

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 "2018-2019"). Below these is a section for "IPSF ID *" with a dropdown menu and an "Upload File *" button. A "Note" section explains that all documents must be uploaded at the same time and lists reasons why an IPSF ID might not appear in the dropdown. A modal dialog box from "Microsoft Internet Explorer" is overlaid on the form, displaying a yellow warning icon and the message "Only ZIP files should be uploaded." with an "OK" button. At the bottom, a note states "Fields marked with (*) are mandatory."

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.

This screenshot shows the same "Image Upload - IPSF Proofs" form after an upload attempt. 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 now shows "- Select any one -". The "Upload File *" button is still present, and a "Save" button has appeared below it. The "Note" section and the "Fields marked with (*) are mandatory." text are also visible.

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	2018-2019
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	2018-2019
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.

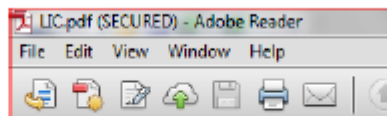
Thanks in advance.

Scan Image Upload Contd...

Employee ID		Employee Name		Year Code	2018-2019
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	2018-2019
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 it
2	The .zip file size should be less than 20 MB	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 printout, 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