



# Online Investment Proof Submission Form (IPSF)

## Walkthrough

Proprietary & Confidential

**AON** Hewitt

# Contents

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## Locating the IPSF 2014-2015 Link

## Section(s) & Item(s) Selection

### 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

## IPSF Confirmation

## Bar-coded IPSF generation & Report

## Forms & Annexure generated along with online IPSF

## Scan Image Upload

# Content Tracker

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## Locating the IPSF 2014-2015 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
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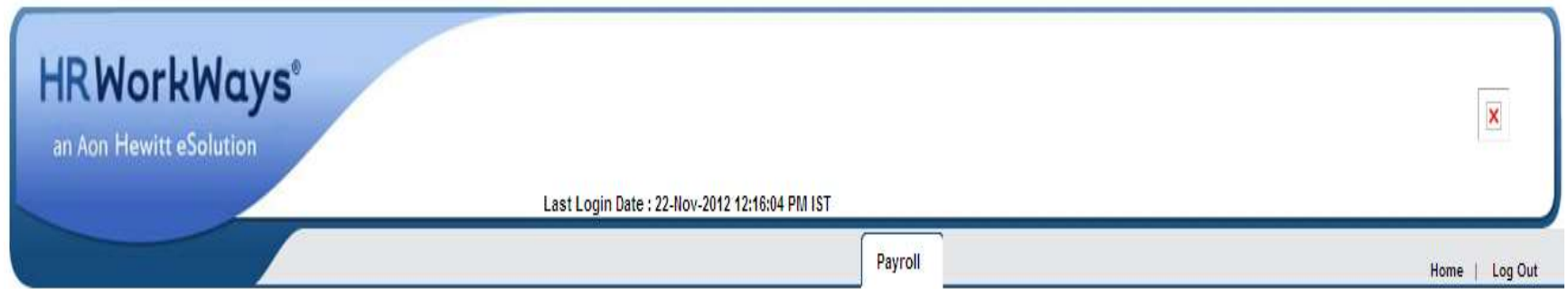
#### IPSF Confirmation

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# IPSF 2014-2015 Link



## Important note:

❖ If you want to select additional Investment categories in any of the sections. In between the updation, to go back to the Section & Item Selection screen click on “**IPSF 2014-2015**” link on the home page under the **Resignee IPSF** . This must be done **before** confirming the IPSF.

❖ **Once the IPSF data is confirmed, you will not be able to make any changes in the IPSF 2014-2015.**

❖ The bar-coded IPSF to be printed along with Annexure and the declaration forms, which has to be duly signed and scanned along with proofs. Scan images to be uploaded in signal zip file. Under **Resignee IPSF**

Click here

# Content Tracker

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## Locating the IPSF 2014-2015 Link

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# Section & Item Selection

## Investment Proofs Submission Form - Select Proofs To Be Submitted For FY 2014-2015

### Section A - HRA

- ☒ Rent paid details for claiming HRA exemption ( Only Original Rent Receipts will be considered)

### Section B - Chapter VI A - Deductions

- ☐ Medical Insurance Premium (U/s 80D) Individual, Spouse, Children & parents
- ☐ Medical Treatment/Handicapped Dependent (U/s 80DD)
- ☐ Interest on Educational Loan (U/s 80E)
- ☐ Permanent Physical Disability (80U)
- ☐ Rajiv Gandhi Equity Savings Scheme (80CCG)

### Section C - Chapter VIA - Section 80C

- ☐ Contribution to Pension Fund ( 80CCC )
- ☐ Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc (SEC80C)
- ☐ Public Provident Fund (PPF) (SEC80C)
- ☐ National Savings Certificate (NSC) (SEC80C)
- ☐ Infrastructure Bonds ( Term should be > = 3 years ) (IBOND) (SEC80C)
- ☐ Children Education Tuition fees (SEC80C)
- ☐ Equity Linked Savings Scheme (ELSS) (SEC80C)
- ☐ Mutual Funds (MF) (SEC80C)
- ☐ Unit Linked Insurance Plan(SEC80C)
- ☐ Term/Fixed Deposit Scheme(Block period of 5 years)
- ☐ NSC Interest (Will also be considered as Other Income) (SEC80C)

### Section D - Housing Loan

- ☐ LOSS FROM HOUSE PROPERTY - SELF OCCUPIED
- ☐ LOSS FROM HOUSE PROPERTY - LETOUT

Proceed

Click here to  
Proceed

Housing loan section , contains housing loan principal and interest with respective self and let-out

### 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.

## Section & Item Selection (upon clicking 'proceed')

Investment Proofs Submission Form - Select Proofs To Be Submitted For FY 2014-2015

Section A - HRA	Section C - Chapter VIA - Section 80C
<input checked="" type="checkbox"/> Rent paid details for claiming HRA exemption ( Only Original Rent Receipts will be considered)	<input type="checkbox"/> Contribution to Pension Fund ( 80CCC )
	<input type="checkbox"/> Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc (SEC80C)
	<input type="checkbox"/> Public Provident Fund (PPF) (SEC80C)
	<input type="checkbox"/> National Savings Certificate (NSC) (SEC80C)
	<input type="checkbox"/> 3 years ) (IBOND) (SEC80C)
	<input type="checkbox"/> 80C)
	<input type="checkbox"/> of 5 years)
	<input type="checkbox"/> ther Income) (SEC80C)

Section B - Chapter VI A - Deductions	Section D - Housing Loan
<input type="checkbox"/> Medical Insurance Premium (U/s 80D) Individual, Spouse, Children & parents	<input type="checkbox"/> LOSS FROM HOUSE PROPERTY - SELF OCCUPIED
<input type="checkbox"/> Medical Treatment	<input type="checkbox"/> LOSS FROM HOUSE PROPERTY - LETOUT
<input type="checkbox"/> Interest on Education	
<input type="checkbox"/> Permanent Physic	
<input type="checkbox"/> Rajiv Gandhi Equit	

**Microsoft Internet Explorer**

Go through the guidelines document regarding the proof submission shared thru e-mail.  
Please ensure to have the hardcopies of all your investment proofs before proceeding further.  
Do not confirm the IPSF unless you fill the sections that are applicable to you.  
Use Save & View option for draft report.  
Click on confirm button after updating the relevant proofs. Once you confirm the IPSF, the IPSF submission will be locked for editing.

Read this note carefully and click here to proceed

OK

Proceed

### Key Points:

- Keep the investment details ready before updating and confirming the IPSF.
- Once confirmed, the IPSF cannot be edited.
- Select (tick) the item within the section for which you wish to submit proofs, and click on 'Proceed'.

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

## Investment Proofs Submission Form 2014-2015

### Master Information

Fields marked with ( \* ) are mandatory.

Employee ID :	78329	Employee Name :	RAJESH KHANNA	Gender :	M
Date of Joining :	14/09/2010	Date of Birth :	14/07/1981	PAN * :	AABPK3999R
No. of Children * :	01/08/2012	Children Going to School * :	0	Children Staying in Hostel * :	0

[Have a Query?](#)

### Dependant Details

Fields marked with ( \* ) are mandatory.

Dependant Name*	Relationship*	Age*	
ABC78329	Self	31	Delete

Add New Row

Previous Save Next

Update all the master details. Fields with \* are mandatory

Click here to Add new rows

Click here to save all the information

Click here to view the next page/section

Click here to delete rows (Except Self)

Click here to understand the requirement of the relevant 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 \(80CCG\)](#)
- [Pension Fund \(SEC80C\)](#)
- [LIC \(SEC80C\)](#)
- [PPF \(SEC80C\)](#)
- [NSC \(SEC80C\)](#)
- [Infrastructure Bonds \(SEC80C\)](#)
- [Children Education Fees \(SEC80C\)](#)
- [ELSS \(SEC80C\)](#)
- [Mutual Funds \(SEC80C\)](#)
- [ULIP \(SEC80C\)](#)
- [Term Deposits \(SEC80C\)](#)
- [NSC Interest \(SEC80C\)](#)
- [Housing Loan - Self \(SEC24\)](#)
- [Housing Loan - Letout \(SEC24\)](#)
- [Other Income](#)
- [Employee Confirm Screen](#)

### 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 2014-2015" 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

## Investment Proofs Submission Form 2014-2015

### Master Information

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

Employee ID :	<input type="text" value="78329"/>	Employee Name :	<input type="text" value="RAJESH KHANNA"/>	Gender :	<input type="text" value="M"/>
Date of Joining :	<input type="text" value="01/06/2012"/>	Date of Birth :	<input type="text" value="14/07/1981"/>	PAN * :	<input type="text" value="AABPK9999R"/>
No. of Children * :	<input type="text" value="1"/>	Children Going to School * :	<input type="text" value="1"/>	Children Staying in Hostel * :	<input type="text" value="0"/>

### Dependant Details

Fields marked with ( \* ) are mandatory.

Dependant Name*	Relationship*	Age*	
RAJESH KHANNA	Self	31	Delete
SEEMA KHANNA	Spouse	27	Delete
ROHIT KHANNA	Son	6	Delete
VINEET KHANNA	Father	68	Delete
SHEELA KHANNA	Mother	58	Delete

Add New Row

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

Previous Save Next

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

### Key Points:

- Row containing 'Self' cannot be deleted.
- The dependent details has to be updated in the screen , These details will be accounted automatically in the drop down selection for the respective screen in IPSF tool.
- ( \* ) mandatory information

# Agenda Tracker

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Locating the IPSF 2014-2015 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
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# HRA

Only Original  
rent receipts are

## Investment Proofs Submission Form 2014-2015

Rent paid details for claiming HRA exemption (Only Original Rent Receipts will be considered)

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

From Date *	To Date *	Rent Per Month *	Period Rent	Address *	State *	City *	Metro	PAN of Landlord
01/09/2012	31/03/2013	15000.00	105000.00	No 41/7, Netaji Road, Bhuvaneshwari Nagar, BSK IIIrd stage, Bangalore - 86	KARNATAKA	BANGALORE	N	AMFPM2593M

Add New Row

Delete Last Row

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

Number of supporting documents : 3

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

PAN of landlord  
is mandatory if  
Rent Per Month  
is equal or  
greater than  
8333.33/-

### Key Points:

- From & To Date must be within 1<sup>st</sup> April, 2014 to 31<sup>st</sup> March, 2015. If you have joined the organization after 1<sup>st</sup> April, 2014, then your DOJ becomes the 'From Date'
- Delhi, Mumbai, Chennai, & Kolkata are 'Metro' cities.
- Landlord PAN mandatory if the rent amount is more than Rs.8333.33 per month or else declaration to be submitted, Declaration form will be generated along with the IPSF..
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Content Tracker

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Locating the IPSF 2014-2015 Link

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

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# Medical Insurance Premium (U/s 80D) Medical

## Investment Proofs Submission Form 2014-2015

### Medical Insurance Premium (U/s 80D)

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

Policy # *	Date of Payment * (dd/mm/yyyy)	Status of Payment *	Name of Policy Holder *	Relationship	Age	Amount *	Mode *	Cheq/Ref #	Preventive health check-up Amount	
MED1234	15/07/2012	Paid ▼	RAJESH KHANNA ▼	Self	31	12196.00	Cheque ▼	877654	4300.00	Delete
MED1235	15/07/2012	Paid ▼	VINEET KHANNA ▼	Father	68	17451.00	Cheque ▼	877655	2700.00	Delete

Add New Row

- Note :
- 1) Rs.15000/- In case of Individual, Spouse & Children.
  - 2) Additional benefit of 15000/- in case of parents below 60 years and Rs.20000 in case of parents above 60 years (Senior citizens).
  - 3) Cash payment is not applicable for this section.

Details automatically appear upon selecting the name basis "Master Information" screen

Number of supporting documents : 4

Previous

Save

Next

### Key Points:

- Benefit under this section can be claimed for Self, Spouse, Children, & Parents
- Late Fee does not qualify for exemption.
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Treatment/Handicapped Dependent (U/s 80DD)

**Investment Proofs Submission Form 2014-2015**

**Medical Treatment/Handicapped Dependent (U/s 80DD)**

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

Name of Dependent *	Relationship	Percentage *	Amount *	
VINEET KHANNA	Father	More than 40% and Less than 80%	50000.00	Delete

Add New Row

- 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 or equal to 40%.
  - 3) Limited to Rs. 50000/-, if the disability is more than 40% and less than 80%.
  - 4) If the disability is more than 80%, Rs. 100000/-.

Number of supporting documents : 1

Previous Save Next

1

## Key Points:

( \* ) mandatory information.

Benefit under this section can be claimed for Dependents only.

▪Refer the guidelines for clarifications .

▪Form 10-IA is prescribed format to claim the Tax benefit for under section 80DD . Mandatory information like .Name of person, disability percentage and validity of the certificate period. No other format will be allowed for deduction .

# Interest on Educational Loan (U/s 80E)

## Investment Proofs Submission Form 2014-2015

### Interest on Educational Loan (U/s 80E)

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

Loan Sanction Date (dd/MM/yyyy) *	Name *	Relationship	Interest Amount *	
08/04/2012	RAJESH KHANNA ▼	Self	6980.00	Delete
<button>Add New Row</button>				

Number of supporting documents : 1

Previous Save Next

### Key Points:

- Benefit under this section can be claimed for Self, Spouse, & Children.
- Only interest can be claimed of the tax deduction.
- ( \* ) mandatory information

# Permanent Physical Disability (80U)

## Investment Proofs Submission Form 2014-2015

### Permanent Physical Disability (80U)

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

Name of the Assesse	Relationship	Percentage*	Amount	
RAJESH KHANNA	Self	More than 40% and <input type="button" value="v"/>	50000.00	<input type="button" value="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 or equal to 40% .
  - 3) Limited to Rs. 50000/-, if the disability is more than 40% and less than 80%.
  - 4) If the disability is more than 80%, Rs. 100000/-.

Number of supporting documents :

### Key Points:

- Benefit under this section can be claimed for Self only.
- Refer the guidelines for clarifications .
- Form 10-IA is prescribed format to claim the Tax benefit for under section 80DD . Mandatory information like .Name of person, disability percentage and validity of the certificate period. No other format will be allowed for deduction .

▪( \* ) mandatory information



# Rajiv Gandhi Equity Savings Scheme (80CCG)

## Investment Proofs Submission Form 2014-2015

### 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 ▼	20/10/2012	RAJESH KHANNA	13556	20000.00	Delete

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 : 1

Previous

Save

Next

**Note:**

- Refer to the next slide for information on Rajiv Gandhi Savings Scheme (80CCG)
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Rajiv Gandhi Equity Savings Scheme (80CCG) - Guideline

## Proof Submission Guidelines

SECTIONS	COMPONENT	PROOF TO BE SUBMITTED	TAX BENEFIT	FOLLOWING WILL BE DISALLOWED
80CCG	Rajiv Gandhi Equity Savings Scheme	<p>Copies of A&amp;B</p> <p>A. The Demat account with the details of investments made in</p> <ol style="list-style-type: none"> <li>1. Shares given under BSE100</li> <li>2. Shares given in CNX100</li> <li>3. Shares of Navratnas, Maharatnas and Miniratnas companies</li> <li>4. Follow on public offers of above companies</li> <li>5. IPO (initial public offers) of PSUs.</li> <li>6. Mutual funds who has invested in above five type of shares shown above.</li> <li>7. ETF (exchange traded funds ) invested money only in 1-5 sr number shown above,</li> </ol> <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 - 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>Tax Benefit will not be extended, if the gross total income exceeds Rs. 10 lakhs;</p> <p>Investment made in companies other than the listed.</p> <p>This scheme is effective 23rd November, 2012, as per notification no 51/2012.</p>

# Conent Tracker

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Locating the IPSF 2014-2015 Link

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|

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# Contribution to Pension Fund ( 80CCC )

## Investment Proofs Submission Form 2014-2015

### 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 *	
614798457	05/09/2012	RAJESH KHANNA	4732.00	Paid	Half Yearly	Delete
614798458	05/03/2013	RAJESH KHANNA	4732.00	Future Payment	Half Yearly	Delete

Total Amount : 9464.00

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. 100000/-.

Number of supporting documents : 1

Previous

Save

Next

### Key Points:

- Benefit under this section can be claimed for Self only
- Policy should specify that the benefit is eligible u/s 80CCC (Pension)
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Life Insurance Premium

## Investment Proofs Submission Form 2014-2015

Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

### Payments

Policy # *	Policy Start Date (dd/mm/yyyy)	Date of Premium Payment *	Status of Payment *	Name of Policy Holder *	Sum Assured *	Premium Amount * (Excluding Late Fee)	Frequency *	Single Premium Policy	
12345	12/02/2010	12/10/2012	Paid ▼	RAJESH KHANNA ▼	42220.00	12131.00	Half Yearly ▼	No ▼	Delete
123212	12/02/2009	12/09/2012	Paid ▼	RAJESH KHANNA ▼	45444.00	10000.00	Half Yearly ▼	No ▼	Delete
12345	12/02/2010	12/05/2012	Paid ▼	RAJESH KHANNA ▼	42220.00	12131.00	Half Yearly ▼	No ▼	Delete

Total Premium Amount : 34262.00

Add New Row

Summary			
Policy #	Sum Assured	Total Premium Amount	Considered for 80C
123212	45444.00	10000.00	9088.80
12345	42220.00	24262.00	8444.00
Total :		34262.00	17532.80

Summary appears upon saving the LIC premium details

### Key Points:

- Policy can be in the name of Self, Spouse, & Children.
- The check the sum Assured and premium paid and considered for 80C.
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

- Note :**
- 1) Late Payment Fee will not qualify for deduction under section 80C.
  - 2) Tax benefit on premium payment will be restricted to maximum of 10% of the sum assured, in case the policy is purchased after 01-Apr-2012, else 20%.
  - 3) Maximum eligibility criteria for Life Insurance Premium is Rs. 100000/-.

Number of supporting documents : 2

Previous

Save

Next

# Public Provident Fund (PPF)

## Investment Proofs Submission Form 2014-2015

### Public Provident Fund (PPF)

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

PPF A/c Number *	Date of Payment* (dd/mm/yyyy)	Name of Policy Holder *	Relationship	Amount *	
147895823	20/10/2012	SEEMA KHANNA	Spouse	5500.00	Delete
Add New Row				Total :	5500.00

- Note :**
- 1) Provident Fund (PF) & Voluntary Provident Fund (VPF): PF is automatically deducted from your salary. Both you and your employer contribute to it. While employer's contribution is exempt from tax, your contribution (i.e., employee's contribution) is counted towards section 80C investments. .
  - 2) Maximum eligibility criteria for Public Provident Fund is Rs. 100000/-.

Number of supporting documents : 2

Previous

Save

Next

### Key Points:

- PPF can be in the name of Self, Spouse, & Children.
- Challan along with first sheet Pass book /online registration for identification should be attached or else it will be rejected.
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# National Savings Certificate (NSC)

Investment Proofs Submission Form 2014-2015

## 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*	
<input type="text" value="4556"/>	<input type="text" value="05/10/2012"/>	<input type="text" value="RAJESH KHANNA"/>	<input type="text" value="5000.00"/>	<input type="button" value="Delete"/>
<input type="button" value="Add New Row"/>			Total :	<input type="text" value="5000.00"/>

Note : 1) Maximum eligibility criteria for National Savings Certificate - NSC is Rs. 100000/-.

Number of supporting documents :

### Key Points:

- NSC must be in the name of Self only
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Infrastructure bonds

## Investment Proofs Submission Form 2014-2015

### 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 *	
877854	20/10/2012	RAJESH KHANNA	KTK	9800.00	Delete

Total Amount : 9800.00

Add New Row

Note : 1) Maximum eligibility criteria for Infrastructure Bonds - IBOND is Rs. 100000/-.

Number of supporting documents :

1

Previous

Save

Next

### Key Points:

- BOND must be in the name of Self only
- Refer the guidelines for clarifications .
- ( \* ) mandatory information



# Children Education Tuition fees

## Investment Proofs Submission Form 2014-2015

### 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 *	
754	30/08/2012	Paid ▼	ROHIT KHANNA ▼	3600.00	Quarterly ▼	1st Standard	Delete
1019	29/09/2012	Paid ▼	ROHIT KHANNA ▼	3600.00	Quarterly ▼	1st Standard	Delete
2121	15/11/2012	Paid ▼	ROHIT KHANNA ▼	3600.00	Quarterly ▼	1st Standard	Delete
7654	15/03/2013	Future ▼	ROHIT KHANNA ▼	3600.00	Quarterly ▼	1st Standard	Delete

Add New Row

Total Fees Paid : 14400.00

- Note :
- 1) Only Tuition / Term Fees will be considered for income tax benefit.
  - 2) Donations, Capitation fees, Computer fees, Uniform fee, Sports fee etc., are not allowed.
  - 3) Tuition / Term Fees paid supported by receipts issued by the school, college, university or educational institution.

Number of supporting documents : 4

Previous

Save

Next

### Key Points:

- Benefit can be claimed on 'Tuition/ Term Fees' for children.
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Equity Linked Savings Scheme (ELSS)

## Investment Proofs Submission Form 2014-2015

### 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 # *	Amount for the period *	Status of Payment *	
ABC	Yes ▾	Apr-12 ▾	Nov-12 ▾	RAJESH KHANNA	94653	9000.00	Paid ▾	Delete
ABC	Yes ▾	Dec-12 ▾	Mar-13 ▾	RAJESH KHANNA	94654	3000.00	Future ▾	Delete

Total Amount : 12000.00

Add New Row

Note : 1) Maximum eligibility criteria for Equity Linked Savings Scheme - ELSS is Rs. 100000/-.

Number of supporting documents : 9

Previous

Save

Next

### Key Points:

- Benefit can be claimed for Self only.
- Policy should specify that the benefit is eligible u/s 80C.
- Refer the guidelines for clarifications .

▪ ( \* ) mandatory information

# Mutual Funds

## Investment Proofs Submission Form 2014-2015

### 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 # *	Amount for the period*	Status of Payment *	
XYZ	Yes ▼	Apr-12 ▼	Oct-12 ▼	RAJESH KHANNA	0998732	16000.00	Paid ▼	Delete
XYZ	Yes ▼	Nov-12 ▼	Mar-13 ▼	RAJESH KHANNA	0998765	8000.00	Future ▼	Delete

Total Amount : 24000.00

Add New Row

Note : 1) Maximum eligibility criteria for Mutual Fund - MF is Rs. 100000/-.

Number of supporting documents : 8

Previous

Save

Next

### Key Points:

- Benefit can be claimed for Self only.
- Statement should specify that the benefit is eligible u/s 80C
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Unit Linked Insurance Plan

## Investment Proofs Submission Form 2014-2015

### 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*	
205797654	19/08/2012	RAJESH KHANNA ▼	18000.00	Yearly ▼	Paid ▼	Delete

Total Amount : 18000.00

Add New Row

Note : 1) Maximum eligibility criteria for Unit Linked Insurance Plan - ULIP is Rs. 100000/-.

Number of supporting documents :

1

Previous

Save

Next

### Key Points:

- Benefit can be claimed for Self, Spouse, & Children
- Policy should specify that the benefit is eligible u/s 80C
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Fixed Deposit Scheme (Block Period of 5 years)

## Investment Proofs Submission Form 2014-2015

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	10344	12/05/2012	RAJESH KHANNA	5000.00	Delete

Total Amount : 5000.00

Add New Row

Note : FDS Fixed Deposit Scheme - Maximum eligibility criteria is Rs. 100000/-.  
FDSC Fixed Deposit Senior Citizen - Maximum eligibility criteria is Rs. 100000/-.  
POST Post Office Savings - Maximum eligibility criteria is Rs. 100000/-.

Number of supporting documents : 2

Previous

Save

Next

### Key Points:

- Benefit can be claimed for Self only.
- Term deposits should be for a minimum period of 5 years
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# NSC Interest (also considered as Other Income)

## Investment Proofs Submission Form 2014-2015

### 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 *	
<input type="text" value="357672"/>	<input type="text" value="08/07/2008"/>	<input type="text" value="RAJESH KHANNA"/>	<input type="text" value="12000.00"/>	<input type="text" value="1239.60"/>	<input type="button" value="Delete"/>
<input type="text" value="863936"/>	<input type="text" value="10/10/2009"/>	<input type="text" value="RAJESH KHANNA"/>	<input type="text" value="15000.00"/>	<input type="text" value="1432.50"/>	<input type="button" value="Delete"/>
<input type="button" value="Add New Row"/>			Total Interest : <input type="text" value="2672.10"/>		

- 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.100000/-

Number of supporting documents :

### Key Points:

- Benefit can be claimed for Self only.
- NSC certificate should have been taken on or after April 01, 2009
- Refer the guidelines for clarifications .
- ( \* ) mandatory information

# Content Tracker

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Locating the IPSF 2014-2015 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

IPSF Confirmation

Bar-coded IPSF generation & Report

Forms & Annexure generated along with online IPSF

Scan Image Upload

# Loss from House Property – Self Occupied

## Investment Proofs Submission Form 2014-2015

### Loss from House Property - SELF OCCUPIED

Fields marked with ( \* ) are mandatory.

Housing Loan Repayment Certificate* <input checked="" type="radio"/> Yes <input type="radio"/> No		<a href="#">Have a Query?</a>																															
Address of the Property * NO 3/3, AKG STREET, GANDHI NAGAR, KANNUR-570001		Loan Lender/Bank Name* STATE BANK OF INDIA																															
Loan Sanction Date 01/04/2013 ( dd/mm/yyyy )		State * KERALA																															
Purpose of Housing Loan Purchase		City * KANNUR																															
Stamp Duty/Reg. Charg Paid Date 30/04/2013 ( dd/mm/yyyy )		Other City																															
Loan Sanction Amount 2500000.00		Date of Occupation/Possession 30/08/2013 ( dd/mm/yyyy )																															
Do you own any other house property <input type="checkbox"/>		Stamp duty & Registration charges paid in current Financial Year 75000.00																															
Total Interest Paid 280000.00		Value of the Property 3500000.00																															
Total Principal Paid (Section 80C Benefit) 450000.00																																	
<table border="1"> <thead> <tr> <th colspan="2">Pre-EMI Interest Paid</th> <th colspan="2">Year Code</th> <th colspan="2">Amount</th> </tr> </thead> <tbody> <tr> <td>2013-2014</td> <td></td> <td>2012-2013</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2011-2012</td> <td></td> <td>2010-2011</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2009-2010</td> <td></td> <td>2008-2009</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2">Total :</td> <td colspan="4">0.00</td> </tr> </tbody> </table>				Pre-EMI Interest Paid		Year Code		Amount		2013-2014		2012-2013				2011-2012		2010-2011				2009-2010		2008-2009				Total :		0.00			
Pre-EMI Interest Paid		Year Code		Amount																													
2013-2014		2012-2013																															
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Total :		0.00																															
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Qualifying Pre-EMI Interest Paid		Year Code		Amount																													
2013-2014		2012-2013		12000.00	0.00																												
2011-2012		2010-2011		0.00	0.00																												
2009-2010		2008-2009		0.00	0.00																												
Total :		12000.00																															
Housing Loan Interest & Principal considered for Tax Benefit																																	
Total Interest	150000.00	Total Principal	120000.00	Benefit U/S 80EE	100000																												

Note : 1) Maximum eligibility for Housing Loan Self Occupied Property is Rs. 150000/-.

Number of supporting documents : 1

Previous Save Clear Next

The housing loan deduction are considered under (Interest )under section 24 & (Principal )under section 80C

### Key Points:

Interest and Pre EMI-Interest can be claimed only if the property has been occupied before 31<sup>st</sup> March, 2014; however, Principal can be claimed

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 2014-2015.

Refer the guidelines for clarifications .

Loan sanction date , date of occupation is mandatory, to claim the housing loan interest under section 24.



# Loss from House Property – Let Out

**Loss from House Property - LETOUT**

Fields marked with ( \* ) are mandatory.

Let Out Property #	Let Out Property 1	
Provisional Certificate Attached	Yes	
Loan Lender/Bank Name*	TN BANK	
Address of the Property *	NO 456, 1st main, 4th cross, Cholapuram,	
State *	TAMIL NADU	
City *	Chennai	
Loan Sanction Date †	18/01/2004	
Purpose of Housing Loan	Construction	
Date of Occupation/Possession †	03/11/2005	
Stamp Duty/Reg. Charg Paid Date †		
Stamp Duty/Reg. Charg Paid Amt	0.00	
Total Principal Paid	67543.00	
Total Interest Paid	238617.00	
Pre-EMI Interest Paid	Paid	Qualifying
2012-2013	0.00	0.00
2011-2012	0.00	0.00
2010-2011	0.00	0.00
2009-2010	0.00	0.00
2008-2009	0.00	0.00
2007-2008	0.00	0.00
Rental Income Received for 2012-2013	120000.00	
Municipal Tax Paid For the Year	3416.00	
Net Annual Value	116584.00	
Repair and Maintenance Charges (30%)	34975.20	
Loan Type	Single	

Self Percentage	100
Total Interest Portion	238617.00
Income / Loss on House Property	-157008.20
Total Principal	67543.00
<input type="button" value="Clear"/>	

Total Income / Loss for all Properties	-157008.00
Total Principal for all Properties	67543.00

† All Dates should be in "DD/MM/YYYY" format.

Note:

1. In case of Income on House Property the amount will be Positive.
2. In case of Loss on House Property the amount will be Negative.

Number of supporting documents :

Key:

- Interest and Pre EMI interest can be claimed only if the property has been occupied before 31<sup>st</sup> March, 2014; however, Principal can be claimed
- 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 2014-2015
- Loan sanction date , date of occupation is mandatory, to claim the housing loan interest under section 24.

# Content Tracker

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Locating the IPSF 2014-2015 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

IPSF Confirmation

Bar-coded IPSF generation & Report

Forms & Annexure generated along with online IPSF

Scan Image Upload

# Previous Employer Details

## Previous Employer Details

Fields marked with ( \* ) are mandatory.

[Have a Query?](#)

### Employer Details

No of Companies	Company Name*	Company PAN*	Company TAN*	From Date* (dd/mm/yyyy)	To Date* (dd/mm/yyyy)	
Company 1	XYZ	BCFP8731M	AABC38457M	01/04/2012	31/05/2012	Delete

### Salary Details

Company Name	Earnings (After Sec 10 Exemption)*	Professional Tax*	Provident Fund*	Vol. Provident Fund*	Income Tax Deducted in Prev Employer*
XYZ	380765.00	1000.00	16800.00	0.00	7124.00
Total :	380765.00	1000.00	16800.00	0.00	7124.00

Add New Row

**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 :

2

Previous

Save

Next

## Key Points:

- The information must pertain from 1st April, 2013 to the Date of Leaving with the previous employer.
- Proofs to be submitted as per guidelines circulated.
- Mandatory to submit the signed copy of form 12B along with final ITCS /From 16 for the current FY:2014-2015 should be submitted or else no previous employment will not be considered .

# Content Tracker

---

Locating the IPSF 2014-2015 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

**IPSF Confirmation**

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# IPSF Confirmation Screen

Investment Proofs Submission Form 2014-2015							
<b>IPSF Confirmation Screen</b>							
<b>Section A - Rent paid details for claiming HRA exemption ( Only Original Rent Receipts will be considered)</b>							
From Date	To Date	Rent per Month	Rent per Year	Location	Metro Flag	PAN of Landlord	
01/09/2012	31/03/2013	15000.00	105000.00	BANGALORE	N	AMFPM2593M	
<b>Section B - Chapter VI A - Deductions from Total Income</b>							
<b>Particulars</b>						<b>Amount</b>	
Medical Insurance Premium (U/s 80D) including Preventive Health Checkup						29647.00	
Medical Treatment/Handicapped Dependent (U/s 80DD)						50000.00	
Interest on Educational Loan (U/s 80E)						6980.00	
Permanent Physical Disability (80U)						50000.00	
<b>Section B - Total</b>						<b>136627.00</b>	
<b>Section C - Chapter VIA - Section 80C</b>							
<b>Particulars</b>						<b>Amount</b>	
Contribution to Pension Fund ( 80CCC )						9464.00	
Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc						24924.60	
Public Provident Fund (PPF)						5500.00	
National Savings Certificate (NSC)						5000.00	
Infrastructure Bonds						9600.00	
Children Education Tuition fees						14400.00	
Equity Linked Savings Scheme (ELSS)						12000.00	
Mutual Funds						24000.00	
Unit Linked Insurance Plan						18000.00	
Fixed Deposit Scheme (Block Period of 5 yrs)						5000.00	
NSC Interest (Will also be considered as Other Income)						2672.10	
<b>Section C - Total</b>						<b>130760.70</b>	
<b>Section D - Housing Loan</b>							
<b>Particulars</b>				<b>Interest Amount</b>	<b>Principal Amount</b>		
Loss from House Property - SELF OCCUPIED				-150000.0	93562.00		
Loss from House Property - LETOUT				-157008.20	67543.00		
<b>Section E - Previous Employer Details</b>							
Name of Company	From Date	To Date	Previous Earnings	Provident Fund	Voluntary Provident Fund	Professional Tax	Previous Tax
XYZ	01/04/2012	31/05/2012	380765.00	16800.00	0.00	1000.00	7124.00
<b>Section G - Other Income</b>							
<b>Particulars</b>						<b>Amount</b>	
Bank Interest						1900.00	
<b>Section G - Total</b>						<b>1900.00</b>	
<input type="checkbox"/> I Confirm that all the proofs are attached and there is no more information that I would like to submit.							
<div> <input type="button" value="Save and View"/> <input type="button" value="Confirm and Print"/> <input type="button" value="Re-print Report"/> </div>							

## Key Points:

- All your inputs get consolidated into one sheet. If you want to select additional Investment categories in any of the sections, go back to the "IPSF 2014-2015" link on the home page under the Year End tab. This must be done before confirming the IPSF.

# IPSF Confirmation Process

The screenshot displays the IPSF Confirmation Process interface. It includes sections for Housing Loan, Previous Employer Details, and a confirmation step. A message box prompts the user to confirm the data, warning that once confirmed, changes will not be possible for 2014-2015. Arrows and callouts guide the user through the process: checking the confirmation box, clicking 'Save and View', and clicking 'OK' in the message box.

Section D - Housing Loan		
Particulars	Interest Amount	Principal Amount
Loss from House Property - SELF OCCUPIED	-150000.0	93562.00
Loss from House Property - LETOUT	-157008.20	67543.00

Section E - Previous Employer Details		
Name of Company	Previous	Provident
XYZ		

Section F - Tax		
Voluntary	Professional Tax	Previous Tax
	1000.00	7124.00

Section G - Total	
	Amount
	1900.00

☒ I Confirm that all the proofs are attached and there is no more information that I wish to add.

**Buttons:** Save and View, Confirm and Print

**Message from webpage:** Once the IPSF data is Confirmed, you will not be able to enter or modify IPSF data. Do you want to Confirm now? [OK] [Cancel]

**Callouts:**

- 1. Check the box if you wish to confirm
- 2. Click here to Confirm and Print
- 3. Click OK to continue

## IMP Note:

Once the IPSF data is confirmed, you will not be able to make any changes 2014-2015.

- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and duly signed copy to be scanned along with proofs

## Key Points:

Save and View Option does not confirm the IPSF, hence, screens are editable

- Confirm gets enabled only after the box is checked (Step 1)
- Once confirmed, the IPSF screens are non editable.
- The IPSF Report gets generated only after confirming the IPSF (Step 3).

## Note:

If you want to select additional Investment categories in any of the sections, go back to the "IPSF 2014-2015" link on the home page under the Year End tab. This must be done before confirming the IPSF.

# Content Tracker

---

## Locating the IPSF 2014-2015 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

## IPSF Confirmation

## Bar-coded IPSF generation & Report

## Forms & Annexure generated along with online IPSF Scan Image Upload

# Example : Printable IPSF



PGBRK

Unique  
Barcode



IPSF126517832901265001111W1

C_847_UAT		IPSF ID : 0126500111	
Investment Proofs Submission Form for the Year 2012-2013			
Employee ID *	78329	Gender *	M
Date of Joining	01/06/2012		
Name *	RAJESH KHANNA		
No. of Children going to School *	1		
PAN *	AABPK9999R		
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
01/09/2012	31/03/2013	No 41/7, Netaji Road, Bhuvaneshwari Nagar, BSK IIIrd stage, Bangalore - 86, BANGALOR, KARNATAKA	15000.00
PAN of Landlord		AMFPM2593M	
As Per Last Declaration	Section B - Chapter VI A - Deductions from Total Income		Value of Proof Attached.
0	Medical Insurance Premium (U/s 80D) including Preventive Health Checkup		12196.00
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		17451.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%		50000.00
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%		0.00
0	Interest on Educational Loan (U/s 80E)		6980.00
0	Permanent Physical Disability (80U) < 80%		50000.00
0	Permanent Physical Disability Severe Disability (80U) > 80%		0.00
0	Rajiv Gandhi Equity Savings Scheme (80CCG)		0.00
Section C - Chapter VIA - Section 80C			
0	Contribution to Pension Fund ( 80CCC )		9464.00
0	Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc		24924.60
0	Public Provident Fund (PPF)		5500.00
0	National Savings Certificate (NSC)		5000.00
0	Infrastructure Bonds		9800.00
0	Children Education Tuition fees		14400.00
0	Equity Linked Savings Scheme (ELSS)		12000.00
0	Mutual Funds		24000.00
0	Unit Linked Insurance Plan		18000.00
0	5 Year Deposit under Senior Citizen Saving Scheme		0.00

0	Cumulative Term Deposits	0.00
0	5 Year Time Deposit in Post Office	0.00
155789	Housing Loan - Principal Amount paid, Registration Fees, Stamp duty	120000.00
0	Fixed Deposit Scheme (Block Period of 5 yrs)	100000.00
0	NSC Interest (Will also be considered as Other Income)	2689.90
Section D(a) - Loss from House Property - LETOUT		
0	Loss from House Property - LETOUT	-393750.00
Section D(b) - Loss from House Property - SELF OCCUPIED		
-150000	Loss from House Property - SELF OCCUPIED	-0.00
Section G - Other Income		
0	Others	0.00

## Key Points:

- The Printable IPSF has a unique Barcode that identifies every individual, hence,
- Print the IPSF along with the Barcode.
- Do not staple/scratch/write on the Barcode
- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs



## Printable IPSF Contd...

	Section G - Other Income	
0	Bank Interest	1900.00
0	Interest on Deposits in Savings Account (Considered as deduction u/s 80TTA upto Rs.10000)	0.00
0	Pension	0.00
0	Others	0.00

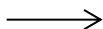
### Declaration:

1. I hereby declare that I have read and understood the guidelines provided in 'Proofs Option Document' and that, all information 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 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.

### 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 on-line IPSF (as covering) ,will not be accepted
- **The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs**

# Content Tracker

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## Locating the IPSF 2014-2015 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

## IPSF Confirmation

## Bar-coded IPSF generation & Report.

## Forms & Annexure generated along with online IPSF Scan Image Upload

## 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	RAJESH KHANNA	
2. Permanent Account Number	AABPK9999R	
House Property U/s 24	Amount	Amount
(a) Housing Interest paid for 2012-2013 as per certificate		238617
(b) Rental Income / Notional rental income for the year 2012-2013	120000	
(c) Less: Municipal Tax Paid to the authorities	3416	
(d) Net Income from House Property (b - c)	116584	
(e) Less: Repairs and Renewals @30% on Net Income of Rs. 116584 (d * 30%)	34975.2	
(f) Net Actual Income to be set off (d - e)		81608.8
(g) Net value of Loss / Income for the year (a - f) 2012-2013	( 157008.2 )	
Note: If the Net Value exceeds interest paid for the year, then it would be treated as Income from House Property		
Place:		
		Signature of the Employee

### Key Points:

- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs

# Declaration for Premium falling due after proof –cut off date

## DECLARATION FOR PREMIUMS FALLING DUE AFTER PROOF CUT OFF DATE OF 05-12-2012

Employee ID : 78329  
Employee Name : RAJESH KHANNA

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 2012-2013. Please consider these premiums payable for the tax benefit in the current financial year 2012-2013.

Contribution to Pension Fund ( 80CCC )			
Policy #	Expected Date of Payment	Name of Policy Holder	Amount
614798458	05/03/2013	RAJESH KHANNA	4732.0
Total			4732.00

Equity Linked Savings Scheme (ELSS)						
Type of Fund	Company/Fund Name	Allowed U/S 80C	From Month	To Month	Folio/Policy #	Total Amount
ELSS	ABC	F	Dec-12	Mar-13	94654	3000.0
Total						3000.00

Mutual Funds						
Type of Fund	Company/Fund Name	Allowed U/S 80C	From Month	To Month	Folio/Policy #	Total Amount
MUTFUND	XYZ	F	Nov-12	Mar-13	0998765	8000.0
Total						8000.00

Children Education Tuition fees					
Expected Date of Payment	Name of the Child	Term/Tuition Fees Paid	Frequency	Class	
15/03/2013	ROHIT KHANNA	3600.0	Q	EDU	
Total					3600.00

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

### Employee Declaration

I here by declare that the information provided above is true and correct and will be solely responsible for any situation arising out of non-payment of the above premiums before 31/03/2013.

Signature :

Date :

### Key Points:

- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs

# Form 12 C

FORM NO. 12C

[See Rule 26B]

Form for sending particulars of income under section 192(2B) for the year ending 31/03/2013

1. Name and address of the employee	78329
2. Permanent Account No .	AABPK9999R
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 - 2012-2013	
(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	1900.0
5. Aggregate of sub-items (i) to (iv) of item 4	Total Rs. 1900.00

.....  
Signature of the Employee

## Verification

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

Place .....

# 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 31/03/2013

Name and address of the employee : 78329  
Permanent Account No. : AABPK9999R  
Residential status : ROR

Serial Number	Name and address of Employer (s)	TAN of the Employer (s) as allotted by the ITO	Permanent Account Number of the Employer (s)	Period of Employment	Total amount of salary excluding amounts required to be shown in Col. 7 and Col. 8	Total amount of house rent allowance, conveyance allowance and other allowances to the extent chargeable to tax [See section 10 (13A) rule 2A and section 10 (14)]	Value of Perquisites and amount of accretion to employee's Provident Fund Account (give details in the annexure)	Total of col. 6, 7 and 8	Amount deducted in respect of life insurance premium, provident fund contribution etc. to which Sec. 80C applies (Give details)	Total amount of tax deducted during the year (enclose certificate issued under sec. 203)	Remarks
1	2	3	4	5	6	7	8	9	10	11	12
1	XYZ	AABC38457M	BCPPFP8731M	60	NA	NA	NA	380765	16800	7124	Professional Tax Rs. 1000

Signature of the Employee

Verification

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

Verified today, the ..... day of. ....

Place .....

## Key Points:

- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs
- .

# 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 : 78329  
 Permanent Account No. : AABPK9999R  
 Period Year ending 31/03/2013

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

### Key Points:

- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs

## 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 perquisite (give details) consumption, free [See rule 3(c)] educational facilities, transport for family, etc. [See rules 3 (d), 3(e) and 3(f)]	Employer's contribution to recognised provident fund in excess of 10% of the employee's salary [See Schedule IV – Part A]	Interest credited to the assessee's account in recognised provident fund in excess of the rate fixed by the Central Government [See Schedule IV – Part A]	Total of columns 9 to 15 carried to column 8 of Form No. 12B
10	11	12	13	14	15	16

### Key Points:

- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs



## Annexure Contd...

### **Self declaration for possession of House property - Self Occupied (1)**

*(Applicable if housing loan interest/principal deduction benefit is claimed u/s 24)*

This is to declare that I RAJESH KHANNA, have gained the ownership/ possession of my house property located at the following address, on 14/03/2009(DD/MM/YYYY).

Address:

No 123/7, Vilvulluvar street, Gandhi Nagar,Jawahar Nagar, Chennai - 47

CHENNAI, TAMIL NADU

Loan Lender/ Bank Name: TN Bank

Loan Sanction Date : 08/12/2007

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.

### Key Points:

- Proofs submitted without the on-line IPSF (as covering) ,will not be accepted
- The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs

## Annexure Contd...

### **Self declaration for possession of House property - Letout (1)**

(Applicable if housing loan interest /principal deduction benefit is claimed u/s 24)

This is to declare that I RAJESH KHANNA, have gained the ownership/ possession of my house property located at the following address, on 14/03/2009(DD/MM/YYYY).

Address:

NO 456, 1st main, 4th cross, Cholapuram, Chennai - 67

Chennai, TAMIL NADU

Loan Lender/ Bank Name: TN BANK

Loan Sanction Date : 18/01/2004

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.

### **Key Points:**

- **Proofs submitted without the on-line IPSF (as covering) ,will not be accepted**
- **The system generated bar-coded IPSF should be printed along with Annexure and declarations forms and signed to be scanned along with proofs**

# Contd...

## **Self declaration given to claim the additional Housing Loan Interest benefit u/s 80EE**

(Applicable if housing loan interest /principal deduction benefit is claimed u/s 24 for self occupied property)

This is to declare that I ABCI0000180, have gained the ownership/ possession of my house property located at the following address, on 10/04/2013(DD/MM/YYYY).

Address:

NO 3/3, AKG STREET, GANDHI NAGAR, KANNUR 670001

KANNUR, KERALA

Loan Lender/ Bank Name: sdff

Loan Sanction Date : 10/04/2013

Value of Property : 2500000

Loan Sanction Amount : 3500000

Further, I hereby certify/confirm that all the above information of my house property are true & correct to avail the additional housing loan interest benefit u/s 80EE that meets the following criteria of IT Act.

1. Above housing loan taken for construction/purchase of my first house property in FY 2013-2014
2. Value of my above house property does not exceed 40 Lakhs
3. Loan sanction amount taken for above house property does not exceed 25 Lakhs
4. I do not own any other house property as on the above loan sanction date.

Date: .....

Signature of Employee

# Content Tracker

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## Locating the IPSF 2014-2015 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

## IPSF Confirmation

## Bar-coded IPSF generation & Report.

## Forms & Annexure generated along with online IPSF

## Scan Image Upload

# Scan Image Upload

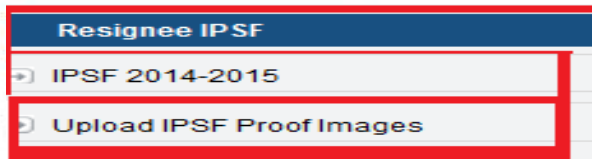
- Please scan the signed copy of IPSF and other annexure (as applicable).
- Save all scanned images/soft copies in one folder
- Check for all the relevant proofs are scanned/ soft copies are saved.
- Zip the folder.
- Name the zip file without any space eg:  
Correct- "EMPIDIPSF201415.zip".  
Incorrect- "EMPID IPSF 2014 15.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.

[illegible]

# Scan Image Upload Contd...

## 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**



Resignee IPSF

- IPSF 2014-2015
- Upload IPSF Proof Images

## IPSF Proofs

This module is used for uploading scanned images of IPSF proofs.



Employee ID: [ ] Employee Name: [ ] Year Code: 2012-2013

**Image Upload - IPSF Proofs**

IPSF ID \* - Select any one -

Upload File \* - Select any one - 0072200044 Browse...

**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 fields for "Employee ID", "Employee Name", and "Year Code" (set to "2012-2013"). Below these is a section for "IPSF ID \*" and "Upload File \*". A "Browse..." button is next to the "Upload File \*" field. A "Note" section states: "Please ensure that, all the documents have to be uploaded at the same time. If the IPSF Id does not appear in the drop down, it means, 1. The IPSF has not been confirmed, OR 2. The proofs have already been uploaded." A "Save" button is at the bottom. A "Microsoft Internet Explorer" error dialog box is overlaid on the form, displaying a yellow warning icon and the text: "Only ZIP files should be uploaded." with an "OK" button.

2. The format of the proofs (scanned images) should be either tiff, pdf, bmp, png, jpg only. Any attempt to upload files of any other formats will result in an error.

The screenshot shows the same web form as above, but with a red error message 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 \*" field now has a dropdown menu showing "- Select any one -". The "Upload File \*" field has a "Browse..." button. The "Note" section and "Save" button are also visible. The error message is repeated in red text above the form fields.

# 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	2012-2013
-------------	---------------	-----------	-----------

**File Transfer has failed, because File Size exceeds its max size(20 MB)**

**Image Upload - IPSF Proofs**

IPSF ID *	- Select any one -	
Upload File *		Browse...

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	2012-2013
-------------	---------------	-----------	-----------

**The file has been successfully uploaded.**

**Image Upload - IPSF Proofs**

IPSF ID *	- Select any one -	
Upload File *		Browse...

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,  
AON Hewitt



# 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	2012-2013
-------------	--	---------------	--	-----------	-----------

**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 *		Browse...

**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.  
AON Hewitt

**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...

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	2012-2013
-------------	--	---------------	--	-----------	-----------

**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 *		Browse...
<b>Save</b>		

**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.

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**Subject: IPSF Scan Upload Failed**

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You will receive an email confirmation upon successful re-upload of IPSF images.

Thanks in advance.  
AON Hewitt

**Only one consolidated file (Including all your proofs) can be uploaded. Once uploaded the system is locked. No further uploads are allowed**

# Key Messages

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- Upload **ALL** the proofs / annexure as applicable (as per the guidelines) along with 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.
- 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**

# Scan Image Upload Contd...

Dos and Don'ts	
Dos	Don'ts
The file should be uploaded with a valid .Zip files	Do not upload the file with out zipping it
The .Zip file size which is exceeding 20B in size	Do not upload the .Zip file with out zipping it
Consolidate all the scan files into a single .Zip file before uploading it	Do not upload a corrupted file
The File format of the scanned files should only	Don't upload a .zip file which consists of files with formats
be any of the these (.tif/.pdf/.Jpg/.Bmp)	any other than the once accepted (.tif/.pdf/.Jpg/.Bmp)
All the scanned files in the .zip file should be in black and while	
Always open the Zip file and check for unknown file or formats before upload	Don't upload the Zip file with checking the unknown file or formats
Remove the password protection	The .Zip file should not be password protected
Convert the pdf files in to(.tif/.pdf/.Jpg/.Bmp)format or re-scan PDF file with non secured mode and upload,	Don't upload the scan image with Secured mode
For those Scan images where you may have received the scan image with Secured mode with password encrypted / with null password	with password encrypted/with null password
Remove the password protection	The .Zip file should not be password protected
zip file should contains max 1 folder	zip file should not contains more then 1 folder

---

Thank you