



# Investment Proof Submission

## Employee Self-Service (ESS) User Guide

Financial Year : 2022 - 23



# Access Self-Service Portal

## Login to Payroll Self-Service Portal

- Go to [Payroll Self-Service Portal](#) and input your credentials, for logging into Single Sign-on Access.



UNITEDHEALTH GROUP®

Enterprise Secure Sign On

Sign In

MS ID (example: asmith1)

Password

[Submit](#)

Need help signing in?

First time Single Sign-On users [register](#) here.

Login Assistance: [helpme.uhc.com](http://helpme.uhc.com)

[MS Password Change](#) here.

Click here to update your [Single Sign-On Account](#) Settings.

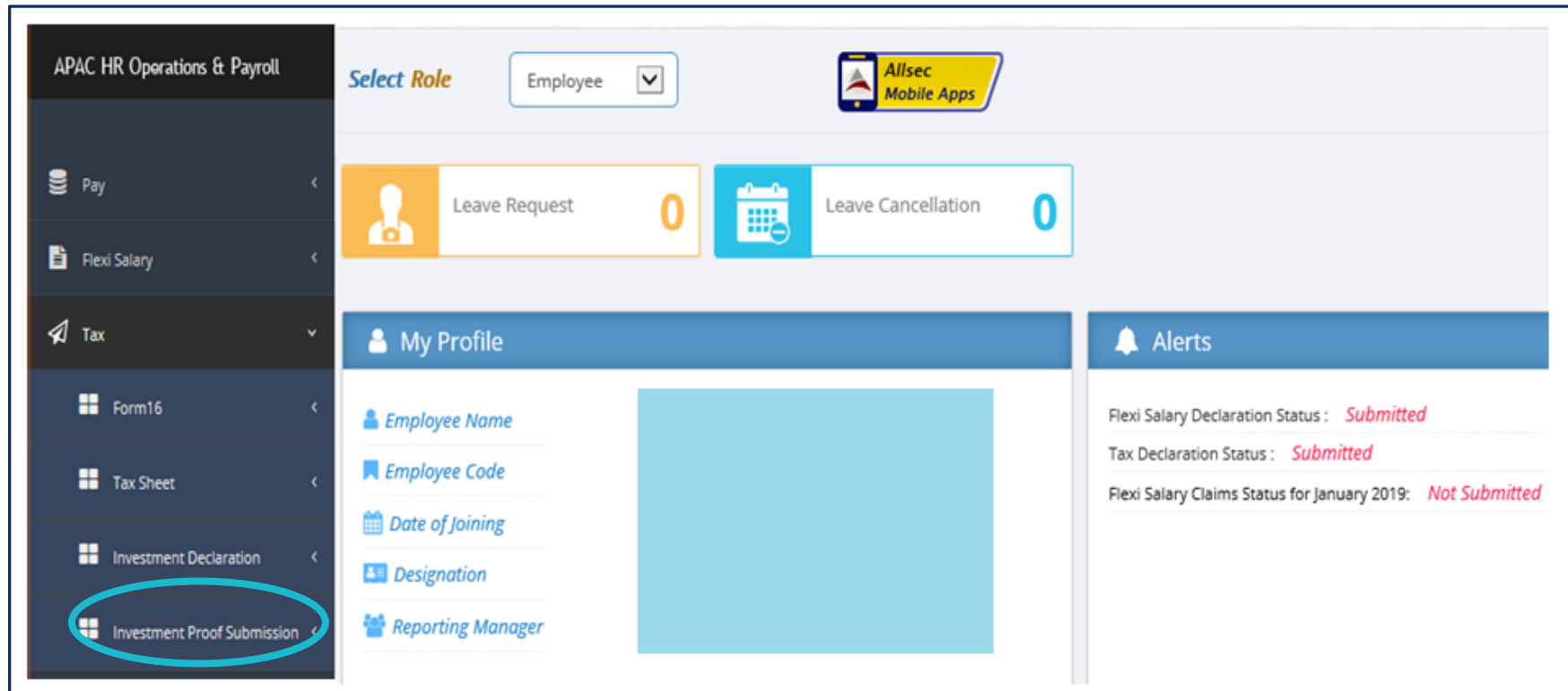
Enterprise Secure Sign On gives UnitedHealth Group employees and contractors access to applications via entry of an MS ID and password.

Do not share your MS ID or password!

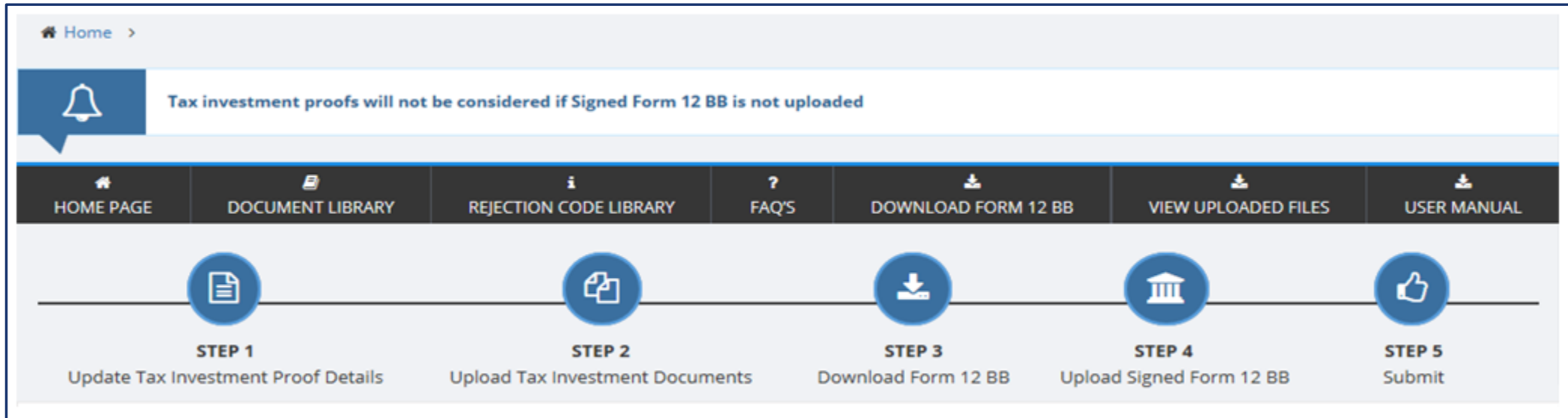
For additional information please visit [helpdesk.uhg.com](http://helpdesk.uhg.com)

# Navigation to Investment Proof Page

1. Go to “Tax” menu of Self-Service Portal.
2. Click on “Investment Proof Submission” option.



# Investment Proof Home Page



## Introduction to menu items on home page

1. **New Joiners: Joined during the current financial year, Please refer to slide 40 to declare your previous employment income first.**
2. Home Page: Use this button to come to home page from anywhere in this module.
3. Document Library: Repository of all the declaration templates along with tax guidelines.
4. Rejection Code Library: Detailed description of rejection codes.
5. FAQ's: Frequently asked questions and their response.
6. Download Form 12BB: Click on this button to download auto filled form 12BB with your investment details. This tab will be enabled only after uploading the scanned copies of investment documents.
7. View Uploaded Files: You can view all the documents you have uploaded on this page.
8. User Manual: User guide to help you navigate through the investment proof module.

# Investment Proof Home Page

Investment Declarations made by you will be automatically reflected here.

This will show the amount that you have declared initially against selected investment.

Click here to upload scanned copies of proofs

Click here to add actual investment details

Click here to view/edit investment proof details

This will reflect amount of Investment proofs submitted this time.

Tax Investment Component

Click here to select new tax investment components

View details of selected

<input checked="" type="checkbox"/> Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Other Income	Other Income	0.00	10,000.00	+		

# Investment Proof Home Page

- You can select the investment type by clicking on “Tax investment Component” drop down option where you will find all investment components e.g. LIC, PPF, Fixed Deposit, ULIP, Housing loan, etc.
- Select the investment component which you wish to submit and it will be added to investment grid below.
- You will see master/basic details of the entries updated last year. e.g. in LIC, policy number, commencement date etc. will reflect automatically.

Click here to select the investment type for which you wish to make entry.

Tax Investment Component: Click here to select new tax investment components

Signed Form12BB UploadQuick Upload

View details of selected

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Section 80C - Life Insurance Premium	Section 80C	0.00	2,434.00	+		

Click here to view/edit the last year master details of the investment entry.

# Investment Proof Home Page

Tax investment proofs will not be considered if Signed Form 12 BB is not uploaded

HOME PAGE

DOCUMENT LIBRARY

REJECTION CODE LIBRARY

FAQ'S

DOWNLOAD FORM 12 BB

VIEW UPLOADED FILES

**STEP 1**

Update Tax Investment Proof Details

**STEP 2**

Upload Tax Investment Documents

**STEP 3**

Download Form 12 BB

**STEP 4**

Upload Signed Form 12 BB

**STEP 5**

Submit

Tax Investment Component: 

Click here to select new tax investment components

Signed Form12BB Upload

Quick Upload

View details of selected

☐ Investments

Income Tax Section No.

Declared Amount

Proof Amount

Add

View/Edit

Upload

☐ Section 80C - Life Insurance Premium

Section 80C

0.00

2,434.00

+

☐ Section 80C - Public Provident Fund

Section 80C

150,000.00

8,000.00

+

☐ Section 80C - Sukanya Samiriddhi Account Scheme

Section 80C

0.00

9,000.00

+

☐ Section 80D - Medical insurance premium paid for Parent

Section 80D

0.00

4,888.00

+

After adding the investment entries, screen will appear as above.  
Step 1: Click on the '+' link to input the investment details.

Step 2: After entering the investment details, upload your proofs by clicking on this icon. You can upload documents as per section.

# Investment Proof Page - House Rent Allowance

Section 10(13A) - Rent

Select Tax Investment Component --Select--

Back

View details of selected

Edit Selected

Delete Selected

Guidelines

	Rent Month	Rental Location	Other Location	Rental Amount	Rental Address	Landlord Name 1	Landlord PAN 1	Landlord Address 1	Landlord Name 2	Landlord PAN 2	Landlord Address 2	Edit
<input type="checkbox"/>	April											
<input type="checkbox"/>	May											
<input type="checkbox"/>	June											
<input type="checkbox"/>	July											
<input type="checkbox"/>	August											

Tick this Check Box to select all months. If you wish to update rent detail for selected months, then tick the check box against those months separately.

After selecting months, click on "Edit Selected" button to enter the rent details.

Click here to view the guidelines for HRA submission.

In case, if you wish to edit entry for any particular month/s, click here

You can delete any entry by clicking here.



# Investment Proof Page - House Rent Allowance

Select rental location from Drop Down

Update Monthly rent amount

If 'non metro city' is selected above, update location manually in this text field.

Input Landlord's name. In case of multiple landlords, mention details in Landlord Name 2

Update Landlord's PAN

Click on 'Save' to finish this entry. You'll be redirected to home page.

Save

Back

Guidelines

☒ Rent - April

Rental Location

Select

Other Location

Rental Amount

Rental Address

Landlord Name 1

Landlord PAN 1

Landlord Address 1

Landlord Name 2

Landlord PAN 2

Landlord Address 2

Input address of rented property here.

Input Landlord's address in this field.

Click on this 'down arrow' button to replicate values to all subsequent months. In case of any change in Rent Amount, Property Detail, Landlord Detail during the year, change the value separately in the month in which the changes are required and click on 'down arrow' button to replicate same values to subsequent months.

# Investment Proof Page - House Rent Allowance

<input type="checkbox"/>	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Rent	Section 10(13A)	96,000.00	228,000.00			

### Section 10(13A) - Rent

Kindly do not upload password protected file. Password protected file will not be considered  
Please Upload a File with extension : .pdf,.jpg,.doc,.xls,.docx,.xlsx,.xps  
Total Upload Size : 10 MB

Rent Receipt

Browse...

Rent Agreement

Browse...

Declaration to claim  
HRA exemption

Browse...

Upload

Signed Form12BB should not be uploaded here.It should be uploaded under "Signed Form12BB upload". 

Close

After updating HRA details, go to investment home page for uploading proofs. Click on this button to upload proofs.

Read the instructions for file size and format.

Click on 'Browse' to select the investment proofs. Rent receipt and rent agreement must be uploaded separately

Once file is selected, click on 'upload' button.

**Important Note:** If you are paying rent to more than one landlord and annual rent to both parties is more than INR 1,00,000 or monthly rent is more than INR 8,333, then mention the PAN of both landlords on HRA receipt.

# Investment Proof Page - Life Insurance Premium

Add Additional Line Item +

Save

Back <

Guidelines

Line Item 1

Name of the Insurance Company

Policy No.

Date of Commencement (dd/mm/yyyy)

Sum Assured

Amount per Frequency

Frequency

Select

Number of Installment Paid on or after 1st Apr 22 Count

Number of Installment Payable on or before 31st Mar 23 Count

Amount Paid on or after 1st Apr 22

Amount Payable on or before 31st Mar 23

Total Amount FY 2022-23

Relationship

Select

Input name of insurance company from which you have bought the policy

Write policy or document reference number

Input the policy commencement date here

Input the Premium amount paid at each frequency

If you have more than one insurance policy, click 'Add Additional Line Item' to add more line item

Input the sum insured as per the policy document

Select frequency of Insurance Premium Payment from drop down.

Input the number of installments paid till date.

Input the number of installments to be paid till 31<sup>st</sup> Mar'23

Select Relationship with the insured person from drop down.

# Investment Proof Page - Public Provident Fund

Input name of the bank or post office where PPF account is opened.

Update name of PPF account holder here

Input PPF account number here

Update your relationship with the account holder

Click on 'Save' button to save entry.

Add Additional Line Item +

Guidelines

Bank / Post Office Name

Account No

Relationship

Select

Name of the investor

Amount deposited in FY 2022-23

0

Input the PPF amount in this field

Save Back

# Investment Proof Page - National Savings Certificate

Update name of post office where NSC account is opened

Update name of NSC account holder here

The date on certificate is to be mentioned here

Input the NSC amount in this field

Add Additional Line Item +

Save  Back <

Guidelines 

Line Item 1

Post Office Name

Certificate Date (dd/mm/yyyy)

Amount

Name of the Investor

Certificate No.

Relationship

Self ▼

Date of Payment (dd/mm/yyyy)

Input NSC payment date here

Input NSC certificate number here

This field will show "Self" by default as NSC benefit is allowed for self only.

# Investment Proof Page – Annuity Plan

Add Additional Line Item +

Save Back

Guidelines

Name of the Insurance Company

Policy No.

Date of Commencement (dd/mm/yyyy)

Sum Assured

Amount per Frequency

Frequency

Select

Number of Installment Paid on or after 1st Apr 22 Count

Number of Installment Payable on or before 31st Mar 23 Count

Amount Paid on or after 1st Apr 22

0

Amount Payable on or before 31st Mar 23

0

Total Amount FY 2022-23 Paid

0

Relationship

Select

Update the Name of the company from which Annuity plan is taken

Write policy / document reference number

Input the premium amount of the policy

Select the frequency of payment here

Input the Annuity Plan commencement date here

Input sum assured as per the policy document

Input the number of installments to be paid till 31<sup>st</sup> Mar'23

Input the number of installments paid till date.

Select your relationship with the account holder from drop down

# Investment Proof Page - Cumulative Term Deposit

Input name of post office where Term Deposit account is opened

Input date on which the account was opened

Input invested Term Deposit amount in this field

Add Additional Line Item +

Save

Back <

Guidelines

Line Item 1

Post Office Name

Certificate Date(Eligible Deposit -5 years and above) (dd/mm/yyyy)

Amount

Name of the investor

Certificate No.

Relationship

Select

Update name of Term Deposit account holder here

Update certificate number of the Term Deposit

This field will show "Self" by default as CTD benefit is allowed for self only.

# Investment Proof Page - ELSS / Mutual Fund

Update Mutual Fund name and scheme in this field

Update name of Mutual Fund / ELSS account holder here

Input invested ELSS / Mutual Fund amount in this field

Select frequency of payment here

The Mutual Fund / ELSS account / Folio number needs to be entered here

Input mutual fund / ELSS policy commencement date here

Input the number of installments paid till date.

Input the number of installments to be paid till 31<sup>st</sup> Mar'23

Select your relationship with the account holder from drop down option

Add Additional Line Item +

Save Save Back <

Guidelines

Name of the Mutual Fund & Scheme

Select

Name of the investor

Amount per frequency

Frequency

Select

Amount Paid on or after 1st Apr 22.

0

Amount Payable on or before 31st Mar 23

0

Date of Commencement (dd/mm/yyyy)

Number of Installment Paid on or after 1st Apr 22 Count

0

Total Amount FY 2022-23 Paid.

0

Folio / Account No.

Number of Installment Payable on or before 31st Mar 23 Count

Relationship

Select



# Investment Proof Page - Housing Loan Principal Repayment

Select whether the house property is self occupied or Let out

Select whether the house is owned by self or jointly

Input loan account number in this field

Select the purpose of loan taken from drop down

If house is self owned, this field will be non-editable. For joint loan, Input your ownership percentage

This field will be auto-calculated basis principal paid and registration fee / stamp duty paid

Input date of possession of the property

Update location of the property in this field

Select name of the bank from where the loan was taken

Input the total principal paid during the current Financial Year

Provide the registration fee/ Stamp duty paid in current Financial Year

Add Additional Line Item +

Save Back <

Guidelines

Self occupied / Let out

Loan Account number

% of employees Claim (in case of Joint Loan)

Loan owned by

Loan Purpose

Total FY 2022-23

Property Location

Principal Paid

Possession Date(dd/mm/yyyy)

Bank Name

Registration Fee/Stamp Duty paid after 1st Apr 22

Remarks

# Investment Proof Page– Fixed Deposit


Input name of bank where Fixed Deposit account is opened


Select date on which the Fixed Deposit was opened

Input invested Term Deposit amount in this field

**Fixed Deposit**

Add Additional Line Item +

Save  Back <

GuideLines 

Line Item 1

Name of the Bank


Name of the investor


Fixed Deposit Receipt Date (dd/mm/yyyy)

Fixed Deposit Receipt No.

Amount

Relationship

Self 

Save 

Update name of Fixed Deposit account holder here

Input receipt number of the fixed deposit in this field

This field will show “Self” by default as Fixed Deposit benefit is allowed for self only

# Investment Proof Page - Tuition Fee

You may add additional row by clicking on this button (Benefit can be claimed for maximum two children)

Input name of school / college / institution where tuition fee has been paid in current Financial Year

Input frequency of payment here

Input name of the child in this field

Update tuition fee paid for this child.

Input number of installments paid till date.

Input number of installments to be paid till 31<sup>st</sup> Mar'23

Add Additional Line Item +

Save

Guidelines

Name of the Institution

Name of the Child

Tuition Fee per Frequency

Frequency

Select

Number of Installment Paid on or after 1st Apr 22 Count

Number of Installment Payable on or before 31st Mar 23 Count

Amount Paid on or after 1st Apr 22

0

Amount Payable on or before 31st Mar 23

0

Total Amount FY 2022-23 Paid

0

# Investment Proof Page - Pension Fund Contribution (80CCC)

Add Additional Line Item +

Save Home Back <

Guidelines ⓘ

Name of the Insurance Company	Amount per Frequency	Amount Paid on or after 1st Apr 22
<input type="text"/>	<input type="text"/>	0
Policy No.	Frequency	Amount Payable on or before 31st Mar 23
<input type="text"/>	Select	0
Date of Commencement (dd/mm/yyyy)	Number of Installment Paid on or after 1st Apr 22 Count	Total Amount FY 2022-23 Paid
<input type="text"/>	<input type="text"/>	0
Sum Assured	Number of Installment Payable on or before 31st Mar 23 Count	Relationship
<input type="text"/>	<input type="text"/>	Select

Update name of the company from which Pension Plan is taken

Input premium amount of the policy.

Input frequency of payment here

Write policy or document reference number

Input Pension Fund commencement date here

Input sum assured as per the policy document

Input the number of installments paid till date.

Input number of installments to be paid till 31<sup>st</sup> Mar'23

Select your relationship with the account holder from the drop down

# Investment Proof Page – Unit Linked Insurance Plan (ULIP)

Update name of the company from which ULIP is taken

Input amount premium of the policy.

Select number of frequency of payment here

Write policy or document reference number

Add Additional Line Item +

Save h Back <

Guidelines

Name of the Insurance Company	Amount per Frequency	Amount Paid on or after 1st Apr 22
<input type="text"/>	<input type="text"/>	0
Policy No.	Frequency	Amount Payable on or before 31st Mar 23
<input type="text"/>	Select	0
Date of Commencement (dd/mm/yyyy)	Number of Installment Paid on or after 1st Apr 22 Count	Total Amount FY 2022-23 Paid
<input type="text"/>	<input type="text"/>	0
Sum Assured	Number of Installment Payable on or before 31st Mar 23 Count	Relationship
<input type="text"/>	<input type="text"/>	Select

Input Pension Fund commencement date here

Input sum assured as per the policy document

Input number of installments paid till date.

Input number of installments to be paid till 31<sup>st</sup> Mar'23

Select your relationship with the account holder from the drop-down option

# Investment Proof Page– Sukanya Samriddhi Account(SSA) Scheme

You can add additional row by clicking on this button (Benefit can be claimed for maximum of two girl child).

Update name of SSA account holder here

Update name of the girl child here


Input name of the post office / bank where SSA account is opened


Input account number of the SSA Scheme

Input invested SSA Scheme amount in this field

### Sukanya Samiriddhi Account Scheme

Add Additional Line Item +

Save  Back <

GuideLines 

Line Item 1


Name of the Investor

Post office/ Bank Name

Amount

Name of Girl Child

Account No

Save 

# Investment Proof Page - 80D Medical Insurance premium paid for Self/ Spouse/ Children

Add Additional Line Item

Save

Back

Guidelines

Category	Frequency	Total Amount FY 2022-23
Select	Select	0
Name of the Insurance Co / Institution	Number of Installment Paid on or after 1st Apr 22 Count	Age Group
		Select
Policy/Bill No	Number of Installment Payable on or before 31st Mar 23 Count	Relationship
		Self / Spouse / Children
Date (dd/mm/yyyy)	Amount Paid on or after 1st Apr 22.	Mode
	0	Select
Premium per Frequency / Bill Amt	Amount Payable on or before 31st Mar 23.	
	0	

Select 'Medical Insurance/ Preventive Health Checkup' from drop down

Input name of Insurance company/Institution.

Select the frequency from the drop down.

Input number of installments paid till date.

Select age group from drop down.

Input policy/ bill number.

Input commencement date of the policy.

Input premium amount of the Insurance policy.

Input number of installments to be paid till 31<sup>st</sup> Mar'23

Select mode of payment from drop down.

# Investment Proof Page - 80D Medical Insurance premium paid for Parent

Select 'Medical Insurance/ Preventive Health Checkup' from drop down

Select the frequency from the drop down.

Input number of installments paid till date.

Input name of Insurance company/Institution

Input policy/ bill number.

Select age group from drop down.

Input commencement date of the policy.

Input premium amount of the Insurance policy.

Input number of installments to be paid till 31<sup>st</sup> Mar'23

Select mode of payment from drop down

Add Additional Line Item +

Save Back

Guidelines

Category	Frequency	Total Amount FY 2022-23 Paid AmtPayable
Select	Select	0
Name of the Insurance Co / Institution	Number of Installment Paid on or after 1st Apr 22 Count	Age Group
		Select
Policy/Bill No	Number of Installment Payable on or before 31st Mar 23 Count	Relationship
		Parents
Date (dd/mm/yyyy)	Amount Paid on or after 1st Apr 22.	Mode
	0	Select
Premium per Frequency / Bill Amt	Amount Payable on or before 31st Mar 23	
	0	



# Investment Proof Page - Disabled Dependent (80DD)

Input name of disabled dependent person in this field

Select "Yes" from drop down

Select your relationship with dependent from drop down tab

Select percentage of disability from drop down as mentioned in Form 10IA

'Total Amount FY 2022-23 claimed' will be updated automatically as per disability percentage selected.

Add Additional Line Item +

Save Home Back <

Guidelines 📄

Name of the Dependant

Certificate in prescribed form attached (10-IA)

Relationship

Percentage of Disability

Total Amount FY 2022-23 claimed

# Investment Proof Page– Self with Physical Disability (80U)

Select disability percentage as per Form 10IA from the drop-down button

Add Additional Line Item +

Save Back <

Guidelines

Percentage of disability	Total Amount FY 2022-23 claimed	Relationship
Select		Self
Certificate in prescribed form attached (10-IA)		
Select		

This field will show "Self" by default

Select "Yes" from drop down

'Total Amount FY 2022-23 claimed' will be updated automatically as per disability percentage selected.

# Investment Proof Page - Medical Treatment for Specified Diseases (80DDB)

The screenshot displays a web form titled "Investment Proof Page - Medical Treatment for Specified Diseases (80DDB)". At the top, there is a header bar with "Add Additional Line Item +" on the left and "Save", "Back", and a left arrow on the right. Below the header is a "Guidelines" link with a document icon. The main form area has a dark grey header with a checkmark and the text "Name of the Patient - JHSGD". Below this, the form is divided into three columns. The first column contains a text input field labeled "Name as in Form 10I" and a dropdown menu labeled "Name of Specified Diseases/Ailments" with "Select" as the current option. The second column contains a dropdown menu labeled "Relationship" with "Select" as the current option and another dropdown menu labeled "Age Group" with "Select" as the current option. The third column contains a dropdown menu labeled "Certificate in prescribed form attached (10-I)" with "Select" as the current option and a text input field labeled "Total Amount FY 2022-23 claimed". Six callout boxes provide instructions: 1. "Input name of the patient as mentioned in Form 10I" points to the "Name as in Form 10I" field. 2. "Select your relationship with the dependent from the drop-down tab" points to the "Relationship" dropdown. 3. "Select 'Yes' in drop down" points to the "Certificate in prescribed form attached (10-I)" dropdown. 4. "Select disease name in drop down" points to the "Name of Specified Diseases/Ailments" dropdown. 5. "Select age category of the patient from the drop-down option. Refer to the footnotes for category description." points to the "Age Group" dropdown. 6. "Total Amount FY 2022-23 claimed will be updated automatically as per the age group selected." points to the "Total Amount FY 2022-23 claimed" field.

Select your relationship with the dependent from the drop-down tab

Input name of the patient as mentioned in Form 10I

Select "Yes" in drop down

Select disease name in drop down


Select age category of the patient from the drop-down option. Refer to the footnotes for category description.


Total Amount FY 2022-23 claimed will be updated automatically as per the age group selected.

# Investment Proof Page - Other Income

Other Income

Add Additional Line Item +

Save  Back <


GuideLines 

Line Item 1

Other Income

Income Type

Remarks

Save 

Input the other income received during the current Financial Year

Input type of income in this field, e.g. - Dividend, Capital Gain, Income from Horse Race, Lottery, etc.

Input any remarks if you wish to submit regarding this particular head

Optum


© 2022 Optum, Inc. All rights reserved.


28

# Investment Proof Page - Interest from Savings Bank Account

Interest from Savings Bank Account

Add Additional Line Item +


Save  Back <

GuideLines 

Line Item 1

Bank Name

Amount

Save 


Bank name (in which savings account interest has been received) needs to entered here.


Input interest on saving bank account received during the current Financial Year

# Investment Proof Page - Interest on Fixed Deposits

Interest on Fixed Deposits

Add Additional Line Item +


Save  Back <

GuideLines 

Line Item 1

Bank Name

Amount

Save 


Input bank name where interest on fixed deposits is received


Input interest on fixed deposit received during the current Financial Year. Also make sure that if bank has already deducted TDS on interest, then update the amount after TDS here.

# Investment Proof Page - Accrued Interest on National Savings Certificates (NSC)

Accrued Interest on National Savings Certificates (NSC)

Add Additional Line Item +


Save  Back <

GuideLines 

Line Item 1

Post Office Name

Amount

Save 

Update name of post office from where the National Savings Certificate was purchased

Input accrued interest on National Savings Certificates received during the current Financial Year

# Investment Proof Page - Interest on Housing loan-Self Occupied

The screenshot displays a web form titled "Investment Proof Page - Interest on Housing loan-Self Occupied". The form is divided into several sections with callouts providing instructions:

- Top Bar:** Includes "Add Additional Line Item +", "Guidelines", "Save", and "Back" buttons.
- Line Item 1:** A dark header bar.
- Left Column:**
  - Self-occupied:** A dropdown menu with "Self-occupied" selected. Callout: "Select 'Self/Joint' in drop down."
  - Date of Possession (dd/mm/yyyy):** A text input field. Callout: "Input possession date"
  - Property Location:** A text input field. Callout: "Input location of property."
  - Loan owned by Self/Joint:** A dropdown menu with "Select" selected.
  - Loan availed date:** A text input field. Callout: "Input date of loan taken."
- Middle Column:**
  - Name of Lender / Financial Institutions:** A dropdown menu with "Lender" selected. Callout: "Select name of financial institution from drop down. In case institution name is not available, select 'Lender' and input the PAN manually"
  - PAN of the Bank:** A text input field. Callout: "PAN field will be auto-populated"
  - Bank Address:** A text input field. Callout: "Input address of the financial institution/ lender."
  - Loan Account number:** A text input field. Callout: "Input loan account number."
  - Loan Purpose:** A dropdown menu with "Select" selected. Callout: "Select purpose loan from drop down"
- Right Column:**
  - Interest:** A text input field. Callout: "Input amount of interest paid during Financial Year 2022-23. If there is any pre-emi interest, add in this only"
  - % of employees Claim (in case of Joint Loan):** A text input field. Callout: "This will depict % of benefit that you want to claim. If selected 'Joint' then system will ask you to Input % of share."
  - Loss on HP:** A text input field.
  - Remarks:** A text input field. Callout: "This will reflect interest benefit that employee will get. If amount is a positive number, then it will be a loss and if amount is a negative then it will be considered as income from house property."



# Investment Proof Page - Education Loan (80E)

The form is titled "Investment Proof Page - Education Loan (80E)". It features a header with "Add Additional Line Item +" and "Save" buttons, and a "Back" button. Below the header is a "Guidelines" section. The main form area contains several input fields and a dropdown menu, each with a callout box explaining its purpose:

- Name of the Bank:** Input name of the bank from where the education loan is taken.
- Repayment Start Date (dd/mm/yyyy):** Select loan taken date in this field.
- Total Amount FY 2022-23 Paid AmtPayable:** This field will be auto-calculated basis the interest paid and payable in current FY.
- Name of the borrower:** Update name of the borrower.
- Interest Amount Paid on or after 1st Apr 22:** Input interest on education loan paid till date in current Financial Year.
- Relationship:** Select relationship your with the borrower.
- Loan Account No.:** Mention Loan Account Number in this field.
- Interest Amount Payable on or before 31st Mar 23:** Input interest on education loan to be paid till 31<sup>st</sup> Mar'23.

# Investment Proof Page– Contribution to NPS (80CCD)

The screenshot shows a web form for contributing to NPS (80CCD). The form includes a header with 'Add Additional Line Item +', 'Guidelines', and 'NKLA'. The main form area contains several input fields and dropdown menus. Callout boxes provide instructions for each field:

- Name of the Pension Fund:** Input name of the pension fund where contribution has been made.
- Frequency:** Input number of frequency of payment here.
- Relationship:** This field will show "Self" as 80CCD can be claimed for self only.
- Name of the Investor:** Update name of the borrower in this field.
- Permanent Retirement Account Number:** Input Permanent Retirement Account Number (PRAN) which is linked to the pension fund.
- Amount per Frequency:** Update contribution amount per frequency in this field.
- Number of Installment Paid on or after 1st Apr 22 Count:** Input number of installments paid till date.
- Number of Installment Payable on or before 31st Mar 23 Count:** Input number of installments to be paid till 31<sup>st</sup> Mar'23.

The form also includes summary fields on the right: Amount Paid on or after 1st Apr 22 (0), Amount Payable on or before 31st Mar 23 (0), and Total Amount FY 2022-23 (0). Navigation buttons 'Save', 'Back', and 'Cancel' are at the top right.

# Investment Proof Page – Income/ Loss from Let out House Property

Select Loan category from drop down. In case, if you wish to show rental income only, then select "No Loan/ Loan Closed" and enter the required details

Select loan purpose from drop down

PAN of Financial Institution/Lender will be auto-populated

Input address of the financial institution/ lender.

Input amount of interest paid during Financial Year 2022-23.

This will depict % of benefit that you want to claim. If selected 'Joint' then system will ask you to Input % of share.

Select 'Self/Joint' in drop down.

Input date of loan taken.

Input location of property.

Input possession date

Select name of financial institution/ lender in drop down

Input loan account number.

Input property tax paid during this FY

Input annual rental income received from the let-out property

Input interest, if any, under this option

This will reflect interest benefit that employee will get. If amount is a positive number, then it will be a loss and if amount is a negative then it will be considered as income from house property.

Line Item 1	
Let out	PAN of the Bank
Let out	
Loan category	Loan Purpose
Loan availed	Select
Loan owned by self/joint	Bank Address
Select	
Loan availed date (dd/mm/yyyy)	Loan Account number
Date of Possession (dd/mm/yyyy)	Annual Rental Income
Property location	Property Tax
Name of Lender / Financial Institutions	N/A
Lender	

# Investment Proof Page – Income/ Loss from Let out House Property

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Income / Loss from Letout House Property	Section 24	0.00	1,231.00	+		

Section 24 - Income / Loss from Letout House Property

Kindly do not upload password protected file. Password protected file will not be considered

Please Upload a File with extension : .pdf,.jpg,.xps

Total Upload Size : 10 MB

Provisional Certificate  
(Should not be more than 3 Months old)

Choose File

No file chosen

Possession Letter /  
Registration document /

14/03/2024 - 14/03/2024

Read the instructions for file size and format.

After updating housing loan details, go to investment home page for uploading proofs. Click on this button to upload proofs.

Kindly do not upload password protected file. Password protected file will not be considered

Please Upload a File with extension : .pdf,.jpg,.xps

Total Upload Size : 10 MB

Stamp Duty Documents  
(Documents to be mentioned in claimant's name )

Choose File

No file chosen

Pre-EMI Interest


Choose File


No file chosen

Click on 'Browse' to select the investment proofs. All documents to be uploaded separately under respective headers

# Investment Proof Page - Additional Deduction on Home Loan Interest (80EE)

Add Additional Line Item +

Save  Back <

Guidelines 

Line Item 1


Loan Account No.

Property Value

Possession Date (dd/mm/yyyy)

Loan Sanctioned Date (dd/mm/yyyy)

Own any other residential Property

Select 

Additional Interest Paid

Loan Amount

Select Home Loan Account Number

Select loan sanction date from calendar

Select possession date of property from calendar

Select "No" in drop down

Update property value here

Input additional interest paid on loan (differential amount to be entered if interest is paid in excess of INR 2 Lac)

Input loan amount

# Investment Proof Page - Additional Deduction on Home Loan Interest (80EEA)

The screenshot shows a web form titled "Investment Proof Page - Additional Deduction on Home Loan Interest (80EEA)". The form is divided into several sections. At the top, there are buttons for "Add Additional Line Item", "Guidelines", "Save", and "Back". Below these, there is a "Line Item" section. The form contains the following fields and callouts:

- Bank / Financial Institution Name:** A dropdown menu with "Lender" selected. Callout: "Select Bank/Financial institution from drop down".
- Loan Sanctioned Date (dd/mm/yyyy):** A date input field. Callout: "Select loan sanction date from calendar".
- Possession Date (dd/mm/yyyy):** A date input field. Callout: "Select possession date of property from calendar".
- Loan Account No.:** A text input field. Callout: "Input Home Loan Account Number".
- Stamp duty value of the residential house property:** A text input field. Callout: "Input property address".
- Additional Interest Paid:** A text input field. Callout: "Input additional interest paid on loan (differential amount to be entered if interest is paid in excess of INR 2 Lac)".
- Property Address:** A text input field. Callout: "Update property value here".
- Own any other residential property on the date of sanction of the loan:** A dropdown menu with "Select" as the current option. Callout: "Select 'No' from drop down".

# Investment Proof Page - Deduction on Electric Vehicle Loan Interest (80EEB)

The screenshot shows a web form titled "Investment Proof Page - Deduction on Electric Vehicle Loan Interest (80EEB)". The form is divided into sections. At the top, there are buttons for "Add Additional Line Item +", "Save", and "Back". Below these is a "Guidelines" link. The main section is titled "Line Item 1". It contains several input fields and a dropdown menu, each with a callout box explaining its purpose:

- Name of the Vehicle:** A text input field with a callout box saying "Enter the Name/Type of the Electric vehicle".
- Registration certificate No.:** A text input field with a callout box saying "Enter the vehicle registration certificate number".
- Own any other Electric vehicle on the date of sanction of the loan:** A dropdown menu with "Select" as the current option and a downward arrow. A callout box says "Select 'No' in drop down".
- Bank /Financial Institution Name:** A text input field with a callout box saying "Input bank/financial institution name from where the loan is taken".
- Loan Sanctioned Date (dd/mm/yyyy):** A text input field with a callout box saying "Select loan sanction date from calendar".
- Interest Paid:** A text input field with a callout box saying "Input interest paid on loan during the current financial year".
- Loan Account No.:** A text input field with a callout box saying "Input Loan Account Number".

# Investment Proof Page – Previous Employment Income

HOME PAGE DOCUMENT LIBRARY REJECTION CODE LIBRARY FAQs DOWNLOAD FORM 12 BB VIEW UPLOADED FILES USER MANUAL

STEP 1 Update Tax Investment Proof Details STEP 2 Upload Tax Investment Documents STEP 3 Download Form 12 BB STEP 4 Upload Signed Form 12 BB STEP 5 Submit

Have you employed in any other organization before joining UHG/Optum during current financial year ?

☐ Yes ☐ No

Submit

Select option "Yes/No" and click on Submit

Tax Investment Component: Click here to select new tax investment components

View details of selected

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Previous Employment Income (Gross Income)	Form 12B	0.00	0.00	+		

Click add to submit the previous employer income details

1. Declaration of previous employer income is mandatory :

- **Opted YES:** Please fill the form 12B using the tax sheet (Final F&F tax sheet) as issued by previous employer.
- **Opted NO:** Please fill the form 12B as NIL (i.e declare previous employer's details as NIL)

2. Also, submit Dully filled and signed Form 12B in both options.



# Investment Proof Page – Previous Employment Income

The screenshot shows a web form titled "Previous Employment Income For FY 22-23". At the top, there are buttons for "Add Additional Line Item +", "Guidelines", "Save", "Print", "Back", and a left arrow. Below the title bar, there is a section for "Line Item 1". The form contains several input fields and labels:

- Name of the Employer:** A text input field.
- From Date (dd/mm/yyyy):** A date input field.
- To Period (dd/mm/yyyy):** A date input field.
- Gross Income (A):** A text input field.
- Sec 10 Exemptions (Leave encashment + Gratuity + Transport Allowance) (B):** A text input field.
- Section 10 Exemption - Others (HRA, LTA etc) (C):** A text input field.
- Salary after sec 10 (A-B-C):** A text input field.
- PF:** A text input field.
- NPS Employer contribution (Deduction under section 80 CCD(2)):** A text input field.
- TAX:** A text input field.
- Tax Deducted:** A text input field.
- Employer contribution to PF / NPS / Superannuation:** A text input field.
- Remarks:** A text input field.

Callout boxes provide additional instructions:

- Select your Date of Joining in previous employer:** Points to the "From Date" field.
- Input your previous employer's name here:** Points to the "Name of the Employer" field.
- Enter the Sec 10 Exemption amount provided by your previous employer for (HRA, LTA etc):** Points to the "Section 10 Exemption - Others (HRA, LTA etc) (C)" field.
- This field will be auto calculated by deducting the value of Sec 10 exemptions from Gross Income:** Points to the "Salary after sec 10 (A-B-C)" field.
- Enter the Professional Tax deducted in your previous employer, if any:** Points to the "TAX" field.
- Input the Income Tax deducted in your previous employer:** Points to the "Tax Deducted" field.
- Select your Date of Leaving in previous employer:** Points to the "To Period" field.
- Input your Gross Income as per your Full & Final Tax sheet:** Points to the "Gross Income (A)" field.
- Enter the Sec 10 Exemption amount provided by your previous employer for (HRA, LTA etc):** Points to the "Sec 10 Exemptions (Leave encashment + Gratuity + Transport Allowance) (B)" field.
- Enter the Provident Fund deducted in your previous employer:** Points to the "PF" field.

# Form 12BB- Download & Upload

Home > / Tax > / Tax Proof Submission New

Tax investment proofs will not be considered if Signed Form 12 BB is not uploaded

HOME PAGE	DOCUMENT LIBRARY	REJECTION CODE LIBRARY	FAQ'S	DOWNLOAD FORM 12 BB	VIEW UPLOADED FILES
<b>STEP 1</b> Update Tax Investment Proof Details	<b>STEP 2</b> Upload Tax Investment Documents	<b>STEP 3</b> Download Form 12 BB	<b>STEP 4</b> Upload Signed Form 12 BB	<b>STEP 5</b> Submit	

After filling all details and uploading all documents, click on “Download Form 12 BB” tab. It will ask you to open or save the document. Please save this document and follow below steps :

- Check the investment details in Form 12BB to ensure all your investments have been recorded accurately.
- Upload Signed Form 12BB under respective head.

# Final Step

HOME PAGEDOCUMENT LIBRARYREJECTION CODE LIBRARYFAQ'SDOWNLOAD FORM 12 BBVIEW UPLOADED FILESUMANUAL

STEP 1Update Tax Investment Proof Details

STEP 2Upload Tax Investment Documents

STEP 3Download Form 12 BB

STEP 4Upload Signed Form 12 BB

STEP 5Submit

Tax Investment Component:

Signed Form12BB Upload

Click on this button to upload copy of Form 12BB.


View details of selected

	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Section 80C - Housing Loan Principal Repayment	Section 80C	0.00	51,600.00	+		

Submit

- After uploading copy of Form 12BB, kindly submit the investment page by clicking on “Submit” button given at the bottom of investment home page. This button will not appear until Form 12BB is not uploaded.
- Note that once the submission is done, you’ll not be allowed to do any changes/ modifications to your investment details.

# Things to Remember

1. Ensure that all required proof documents for each investment entry you have made is uploaded under relevant sections on the portal.
2. Please validate the data in Form 12BB with the entries that you made in the portal. In case, you find any discrepancy in the data, do contact Helpdesk.
3. Ensure that you have uploaded **Signed Form 12BB** along with scanned copies of investment documents.
4. Form 12BB must be uploaded in “Signed Form 12BB Upload” tab only.
5. Guidelines can be accessed by clicking on the  button in each section.
6. Tax Proof User Guide and declaration templates are available under “Document Library” for your use and reference.
7. If you are uploading investment proofs copies by clicking photo from cell phone, ensure to compress the image size as maximum size allowed on portal is 10MB.
8. **Please raise consolidated query (Raise all the query in a single ticket) on help desk as second query can not be raised on help desk until the first query is resolved.**
9. In case you are on planned leave during investment proof submission period, plan to complete your submission accordingly. **No exception will be provided.**

# Do's / Don'ts



## Do's

- Submit your investment details and proof documents early to avoid last minute rush.
- Keep a copy of tax proof document for reference.
- In case of any query, please raise it via 'Add a Case' available on 'Helpdesk' tab.
- Please go through the Investment guidelines before submitting the proofs (as the documents required are clearly mentioned in the Investment guidelines) to avoid rejections.
- Please raise consolidated query (Raise all the query in a single ticket) on help desk as second query can not be raised on help desk until the first query is resolved.
- In case you are on planned leave during investment proof submission period, plan to complete your submission accordingly. **No exception will be provided.**



## Don'ts

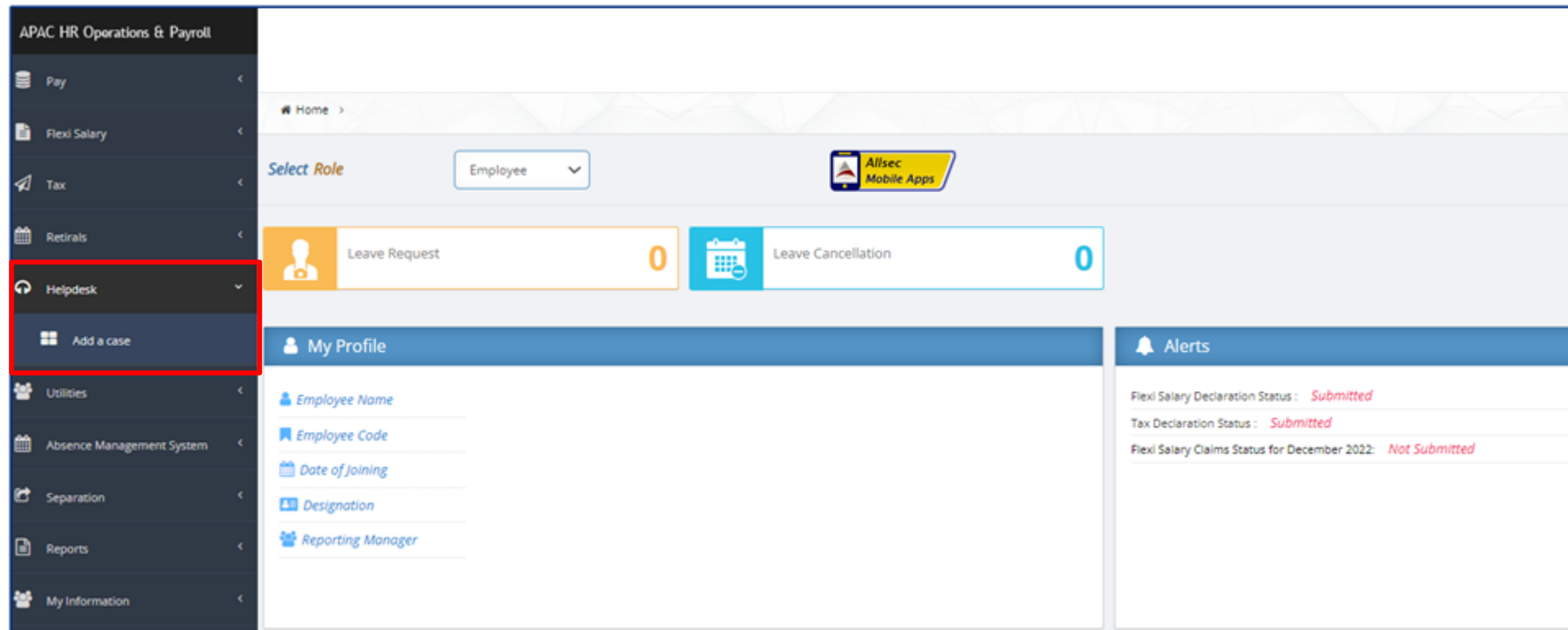
- Do not upload file type other than .PDF, .jpg, xls, .xlsx, xps.
- Do not upload files more than 10 MB
- Do not upload password protected files.
- Do not wait for last date to upload your document, as it increases the load on to the Server / Scanner which impacts the server response time.
- Do not upload Medical/Fuel/LTA reimbursement bills.
- Do not submit tempered proofs.

# Helpdesk Guide

For Investment Proof Query only

# Navigation to Query Helpdesk

1. Go to “Helpdesk” menu of Self-Service Portal.
2. Click on “Add a case” option to go to raise a query regarding investment.



# Query Helpdesk Home Page

Select the category “Tax Proof Submission” in all 3 options (Category, Type & Details)

Enter the query summary in this field.

Share your query in detail in this field.

Click on Submit once the above fields are completed

Read the instructions while raising the query.

Open Cases0

Closed Cases2

All Cases2

Create a New Case

Dashboard

Create a New Case

Category\*Tax Proof Submission

Type\*Tax Proof Submission

Detail\*Tax Proof Submission

Summary of your Case\*

Detailed Description of your Case\*

Submit

Suggested answers to your query

Kindly raise a ticket for any clarifications related to tax proof submission.  
Please consolidate all your queries and raise a ticket as you cannot raise a new ticket under Tax Proof Submission category until existing ticket is closed.



# Helpdesk Dashboard Home Page

Open Cases1

Closed Cases1

All Cases2

Create a New Case

Dashboard

Open Cases

Your query ticket will be responded within 3 working days

Thread	Allsec Case No	Category	Type	Detail	Create Date	Summary of your Case	Replied on	Time taken to respond (Hrs)	Status
	HRDP11182238614	Tax Proof Submission	Tax Proof Submission	Tax Proof Submission	Nov 18 2022 7:25PM	HRA PROOFS NOT CONSIDERED		0	OPEN

Page < 1 > of 1 | Go 10

This is the AllSec Case No. assigned for your case

This field will be auto populated basis the time taken by AllSec to respond to your query

Click on this to go to the query resolution page

This column will reflect the date when Allsec replies to your query

# Helpdesk Resolution Page

Open Cases

Closed Cases

All Cases

Create a New CaseDashboardClosed Case

Case Setting

Case No

HRDP02052121393

Status

Replied

Create Date

Feb 5 2021 11:44AM

Category

Tax Proof Clearance

Type

Medicaid (80D)

Detail

Medical Insurance 80D

This will show the current status of the case

APAC HR Operation & Payroll response

Type

Proof Got rejected due enrollment form

Detailed Description of your Case

HL,  
Please open the window to provide the additional documents.  
Regards

Replied By

UHTAXAUDIT16

Replied

The phase II will be opened by Tomorrow, Kindly submit the required proofs within Feb 12

This box will show the resolution provided to you for your query

# Optum

Optum is a registered trademark of Optum, Inc. in the U.S. and other jurisdictions. All other brand or product names are the property of their respective owners. Because we are continuously improving our products and services, Optum reserves the right to change specifications without prior notice. Optum is an equal opportunity employer.

© 2022 Optum, Inc. All rights reserved.