

Ascent ESS

Actual Investment Declarations – User Manual

Eilisy Technologies Pvt. Ltd.
Ascent Support Team



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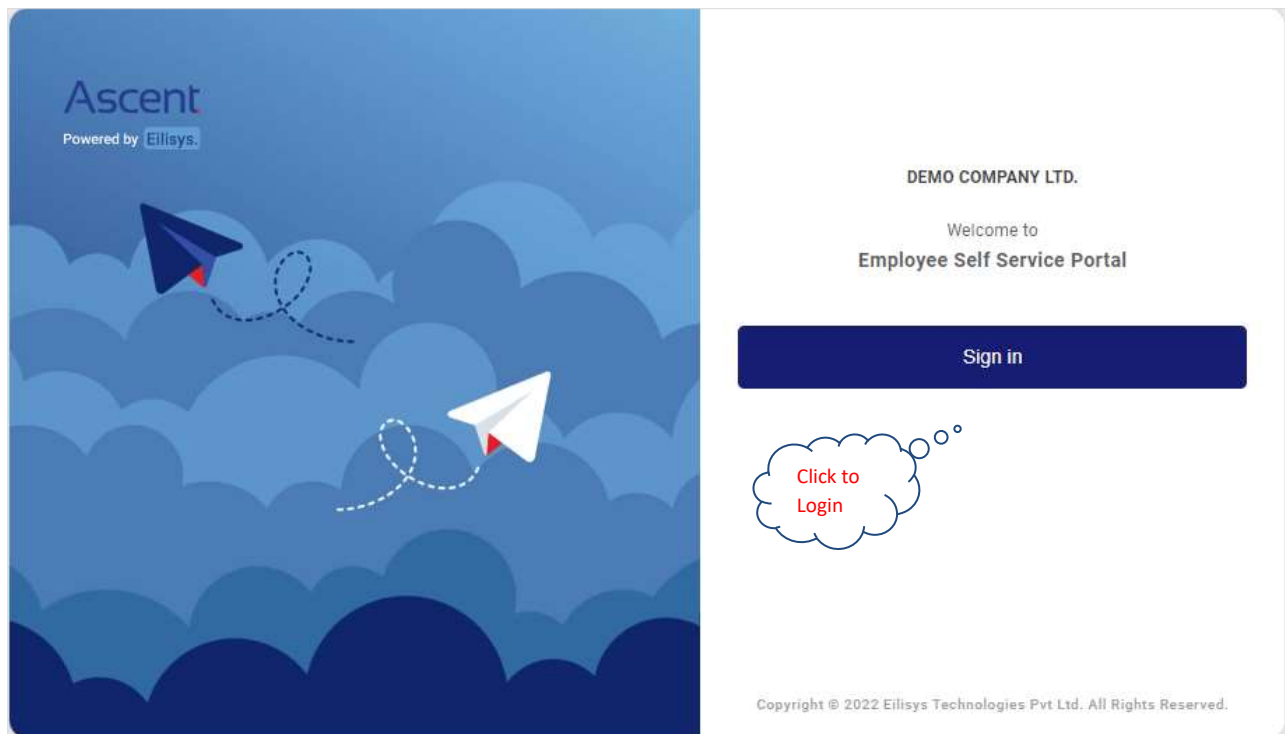
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Employee Self Services

Employee Self Service enables employees to update their Personnel Information, Investment Declaration. Employees can also view their Payslips and Income Tax report.

A link will be provided by the Payroll personnel (i.e., <http://servername/myascentpayroll>) & it will be opened in the users default browser i.e., Internet Explorer/ Firefox/ Mozilla/ Google Chrome.

Getting Started - User Profile



Login Window

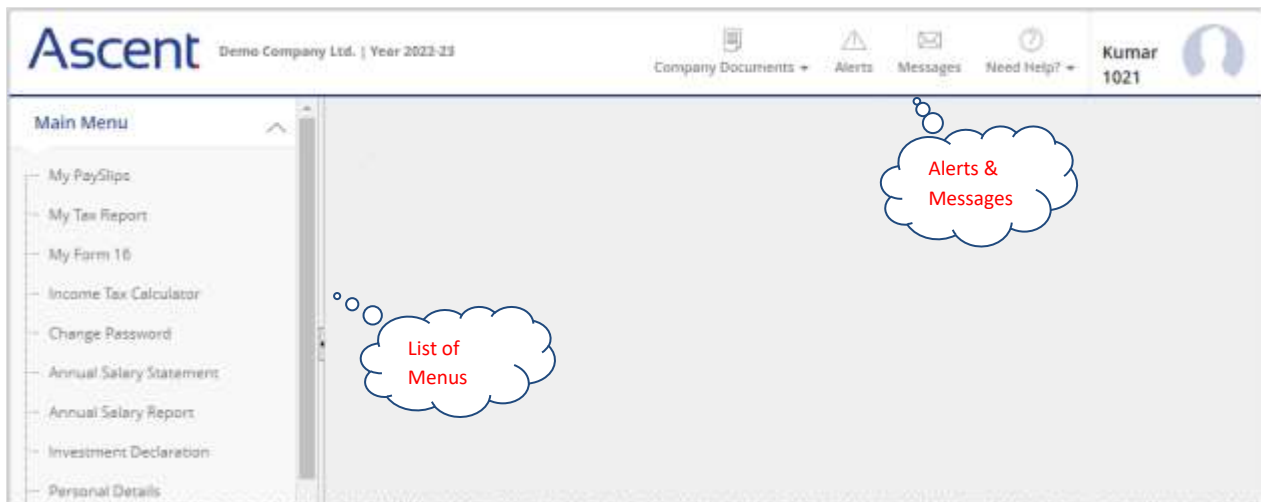
The diagram illustrates the login process for Ascent ESS. It consists of two screens: the Login Screen and the Password Screen, connected by a right-pointing arrow.

Login Screen: The header is "DEMO COMPANY LTD.". Below it is the "Sign In" title. There is a "Username" label above a text input field containing "1021". At the bottom is a large blue button labeled "Next".

Password Screen: The header is "DEMO COMPANY LTD.". Below it is the "Sign In" title. There is a "Username" label above a text input field containing "1021", with a "Change user" link to its right. Below that is an "Enter password" label above a password input field with four asterisks. There is a "Remember me" checkbox (checked) and a "Forgot Password?" link. At the bottom is a large blue button labeled "Next".

- User need to type the User Name, the correct Password to Login to the ESS.
- These details will be given by Payroll personnel.
- If user forgets the password, then user can click on the [Forgot Password](#) link.

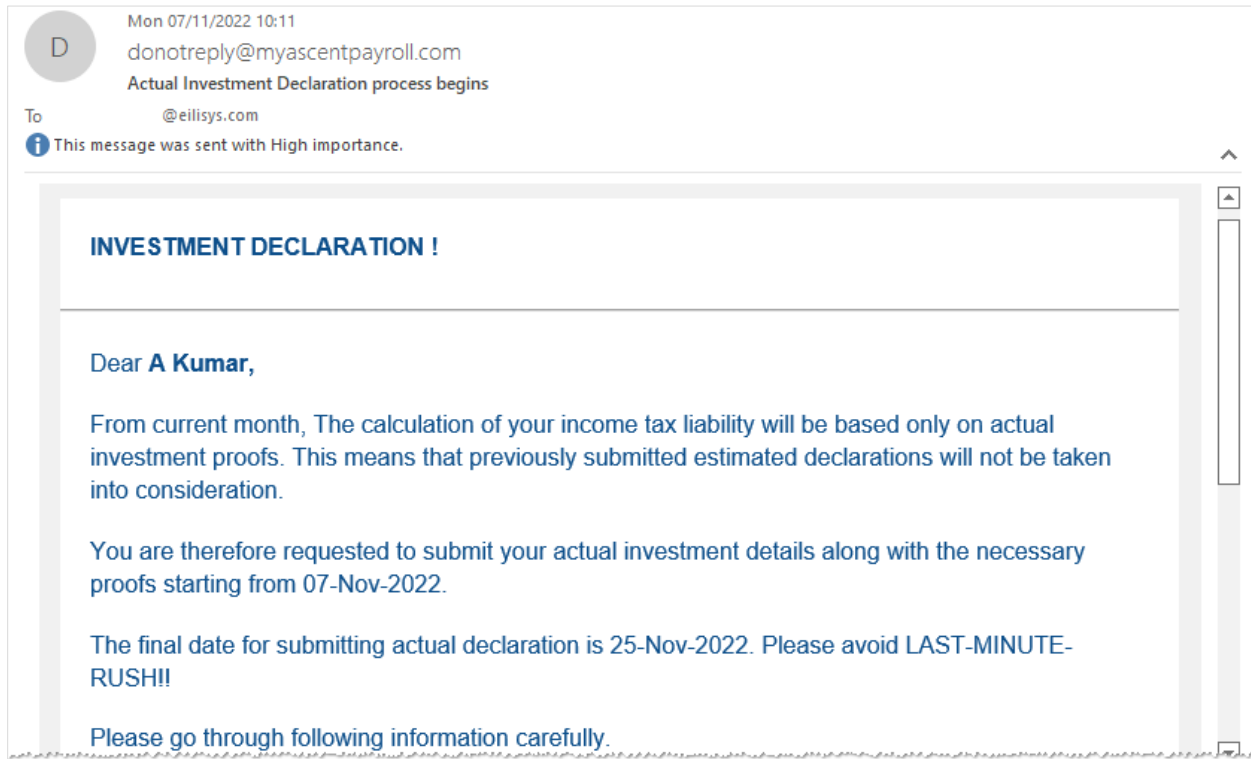
Once the user logs in to ESS, following menu options will be displayed...



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Email Notification for Actual Investment Declaration

User will receive an email notification for Actual Investment Declaration.



Investment Declaration

This module will allow user to enter investment declarations for Income Tax calculation purpose. By End of financial year, employer will ask employees to provide the investment declaration details. Employer will enable the actual declarations at Employee Self Service (web portal) for employees to provide the investment details before the due date.

Income Tax Regime

If the option of New Tax Regime, has been provided by Organization then the system will ask to select the Regime. (If it's not selected earlier.)

The Investment Declaration menu...Screen will be shown as below:

User will be able to view the Quick links i.e., Old and New tax rates and Frequently asked questions.

“Go to Tax Calculator” link will re-direct to the Income Tax Calculator.

User need to select the Tax Preference & click on the Submit button.

Note:

- Tax Preference selection is a one-time activity.
- Once employee sets his preference, it cannot be changed. Access restricted to Admin only.
- Continue with existing rates means OLD Income Tax Slabs only.
- User will receive an email notification for “Tax Regime preference received!” on the submission of Tax Preference.

Edit Family Member

Actual declaration will be used while processing the Income Tax in payroll system. Based on the actual declaration, system calculates the income tax and necessary statutory returns will be filed.

Quick Links -

- **Help** – The Help link, system will be navigated to the user for the Training Hub page for e-Learning Videos such as Actual Declaration and Estimated Declaration.
- **Old and new tax rates** – Income Tax Slabs will be displayed.
- **Frequently asked questions** – System will display the Frequently asked questions (if uploaded by Admin/ available).
- **Edit Family Member** – To add/update family member details. Following screen will be displayed for entry.

User can update the details by using Add New button & **Save** the same.

These details will be displayed in the main screen, when employee clicks on “New Actual Declaration”.

New Actual Declaration

- Click on the new actual declaration to create a new actual declaration.

INVESTMENT DECLARATION (ACTUAL)

Subscribed to old tax regime

Estimated **Actual**

This Year Last Year Prior Years

Type	Submitted On	Uploaded On	Status	Detail
No Record found				

Please submit your Actual Investment Details on or before 25-Nov-2022

New Actual Declaration

- Following screen will be displayed.

Dear A Kumar
From this month, for calculating your income tax liability, your previous estimated declarations will not be taken into account. It will be based on your actual investment proofs. Hence, you are therefore requested to submit your actual investment details along with the necessary proofs.

The final date for submitting actual declaration is 25-11-2022. Please avoid LAST-MINUTE-RUSH!!

Please go through following information carefully.
1. Actual Investment Declaration can be "Save as Draft" before submitting. However, once submitted cannot be modified.
2. Your PF contribution is eligible for deduction under section 80C and will be automatically generated by the system.
3. All proofs should be pertaining to the current financial year only.
4. Investments without proofs will not be considered.

In case, you need more info on tax benefits under each section, please refer taxinfo.doc

For each proof entry, the name of the person to whomsoever the receipt is issued to is required. The data entry is not allowed for field. You need to select a name from the list of your family members. Therefore, before proceeding further, please ensure that your family member details are updated in the system.

Please verify/update your Family members' details below.

Name	Relation with you	Birth Date
TestA	Wife	07-10-1980
TestB	Daughter	19-10-2005
TestC	Mother	16-08-1953

I have read the information and verified my family members' details.
Continue to actual investment declaration

To continue with the declaration, click on the '**Continue to actual investment declaration**' and the following screen will be displayed for detailed entry.

Continued on next page....

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- Following screen will be displayed.

INVESTMENT DECLARATION (ACTUAL)

Name : A Kumar | PAN : ABDPT1231A

Save as Draft

Submit

CHAPTER VI-A

		Max Limit	Deducted From Salary	Additional Investment	
Section 80EEB	80EEB	150000			Details
Sect. 80U (Handicapped)	80U	No disability (0)			
Sect. 80DD (Hand.Depnt.)	80DD	No disability (0)			

EDUCATION LOAN DETAILS (SECTION 80E)

Interest On Education Loan : 0

Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			

+ Add New

80D - HEALTH INSURANCE PREMIUM

Self, Spouse & Dependent Children [Limit](#)

☐ One of Family members is > 60 years

Payment made for health insurance

0

Payment made for preventive Health Checkup

0

Parents [Limit](#)

☐ One of my parents is > 60 years

Payment made for health insurance

0

Payment made for preventive Health Checkup

0

CHAPTER VI-A (80C, 80CCC, 80CCD) [LIMIT](#)

Provident Fund	80C	28800			
Life Insurance Premium	80C				Details
Public Provident Fund	80C				Details
N.S.C. & Interest	80C				Details
Housing Loan Principal	80C				Details

Continued on next page....

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Children Education (TutionFee)	80C		Details
FD from Banks/ Post	80C		Details
Pension Scheme	80CCC		Details
National Pension Scheme	80CCD		Details
Equity Linked Savings (ELSS)	80C		Details
Total of 80CCE		28800	0

HOUSE RENT PAID / PAYABLE DIRECTLY BY YOU

Date From	To	Rent Per Month	LandLord Name (Pan Card)	Metro
No Record found				

[+ Add New](#)

INCOME FROM OTHER SOURCES

Interest On NSC	NSC Calculator	0
Bank Interest on Saving Account		0
Bank Interest on Deposits		0
Any other Income (except capital gain/loss)		0

INCOME / LOSS FROM HOUSE PROPERTY

☐ 1. Self Occupied Property

☐ 2. Let Out Property

LEAVE TRAVEL ASSISTANCE DETAILS

Route		Accompanied by	
Leave Period		Trip duration	
From	To	From	To
Select date	—	Select date	—
Select date		Select date	

Total : 0

Travel Date	Mode	From City	To City	Narration	Amount
No Record found					

[+ Add New](#)

No Proof attached [Attach Proofs](#)

Section 10

Section 10 details will be shown based on the parameters defined or enabled by the Admin.

Chapter VI-A

Under Section VI A, fields will be shown based on the parameters. User can enter the details where ever 'Details' link is available (as applicable).

CHAPTER VI-A

		Max Limit	Deducted From Salary	Additional Investment	
Section 80EEB	80EEB	150000			Details
Sect. 80U (Handicapped)	80U	No disability (0)			
Sect. 80DD (Hand.Depnt.)	80DD	No disability (0)			

EDUCATION LOAN DETAILS (SECTION 80E)

Interest On Education Loan : 0

Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			

+ Add New

Exemptions as applicable according to the parameters will be displayed in front of the respective sections. This may vary depending on the income tax guidelines of the respective financial year.

❖ **Section 80EEB** (If enabled) – Section 80 EEB focuses on the interest payments made on loans taken out to purchase an electric vehicle for personal or professional use.

Example: To enter the details under Section 80EEB, user has to click on the 'Details'.

Sample entry screen given below for reference:

Section 80EEB
80EEB
150000
Details

SECTION 80EEB

Rct / Cert No	Rct / Cert Date	Amount	In name of	Rct / Cert Issued By
123	15-08-2022	150000	A Kumar (Self)	EV Details

ADD ROW
ADD 5 ROWS
Cancel
Update

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- ❖ **Section 80U and Section 80DD** (If enabled) – Two options are available for selection i.e., disability 40-80 % and disability > 80%, and the exemption limit is 75000 and 125000 for F.Y. 2020-21 respectively.

In both the cases user cannot enter the amount. Once the user selects any of the options then amounts will be auto-populated in the respective field.

CHAPTER VI-A		Max Limit	Deducted From Salary	Additional Investment	
Section 80EEB	80EEB	150000		150000	Details
Sect. 80U (Handicapped)	80U	Disability 40-80% (75000)		75000	
Sect. 80DD (Hand.Depnt.)	80DD	No disability (0) Disability 40-80% (75000) Disability >80% (125000)			

- ❖ **Section 80E (Interest on Education Loan)** – The deduction allowed is the total interest part of the EMI paid during the financial year. There is no limit on the maximum amount that is allowed as deduction.

However, need to obtain a certificate from your Bank. Such certificate should segregate the principal and the interest portion of the education loan paid by you during the financial year. The total interest paid will be allowed as a deduction. No Tax benefit is allowed for the principal repayment.

EDUCATION LOAN DETAILS (SECTION 80E)			
Interest On Education Loan :			0
Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			
+ Add New			

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Example: To enter the details under Education Loan, user has to click on the 'Add New'.

Sample entry screen given below for reference:

EDUCATION LOAN LENDER INFO

Rct/Cert No

123

Rct/Cert Date

15-04-2022

Amount

100000

In Name of

A Kumar (Self)

Lender

State Bank Of India (SBI) (AAACS8577K)

Lender Name

State Bank Of India (SBI) (AAACS8577K)

Lender PAN

AAACS8577K

Lender Address

ABC Lane, ABC Square, Pune

Cancel

Save

Click on the Save button & screen will be shown as below.

EDUCATION LOAN DETAILS (SECTION 80E)			
Interest On Education Loan :			100000
Lender (Bank) Name	Lender Address	Lender PAN	Interest
State Bank Of India (SBI) (AAACS8577K)	ABC Lane, ABC Square, Pune	AAACS8577K	100000
+ Add New			

❖ **Section 80D (Mediclaime)** – Options available for Self and Self senior citizen (age above 60) where the exemption limit is 25000 and 50000 for F.Y. 2022-23 respectively. User can select from the options accordingly.

Under section 80D (Mediclaime-Parents), options available for parents and senior citizen parents (age above 60) where the exemption limit is 25000 and 50000 for F.Y. 2022-23 respectively. User can select from the options accordingly.

- a. Self, Spouse & Dependent Children (No parents)
 - i. One of Family member is > 60 **(Not Enabled)**
 - x. Payment made for Health Insurance
 - y. Payment made for Preventive Health Checkup

OR

- b. Self, Spouse & Dependent Children (No parents)
 - ii. One of Family member is > 60 **(Enabled)**
 - x. Payment made for - Health Insurance OR Medical Expenditure
 - y. Payment made for Preventive Health Checkup

– Same options are provided for parents as well.

Sample entry screen given below for reference:

80D - HEALTH INSURANCE PREMIUM

Self, Spouse & Dependent Children [Limit](#)

☐ One of Family members is > 60 years

Payment made for health insurance
18000

Payment made for preventive Health Checkup
0

Parents [Limit](#)

☒ One of my parents is > 60 years

Payment made for
☐ Health Insurance
☒ Medical Expenditure ⓘ
30000

Payment made for preventive Health Checkup
5000

Note:

- a. Overall exemption (i.e., Self + Parents) for Preventive Health Checkup is Rs. 5000 only.
- b. Medical Expenditure option will be displayed only in case of Self/ anyone of Parents is Sr. Citizen.

Chapter VI-A (80CCE)

Under Chapter VI–A (80CCE), the below options will be available for user to declare the investments.

CHAPTER VI-A (80C, 80CCC, 80CCD) LIMIT				
Provident Fund	80C	28800	<input type="text"/>	
Life Insurance Premium	80C		<input type="text"/>	Details
Public Provident Fund	80C		<input type="text"/>	Details
N.S.C. & Interest	80C		<input type="text"/>	Details
Housing Loan Principal	80C		<input type="text"/>	Details
Children Education (TutionFee)	80C		<input type="text"/>	Details
FD from Banks/ Post	80C		<input type="text"/>	Details
Pension Scheme	80CCC		<input type="text"/>	Details
National Pension Scheme	80CCD		<input type="text"/>	Details
Equity Linked Savings (ELSS)	80C		<input type="text"/>	Details
Total of 80CCE		28800	0	

‘Deducted from Salary’ - The deduction components from salary will be auto displayed by the system, in case the respective parameters have been enabled by the admin.

❖ **Example:** Provident Fund, the deductible component from salary is 28800.

CHAPTER VI-A				
		Max Limit	Deducted From Salary	Additional Investment
Section 80EEB	80EEB	150000		150000
CHAPTER VI-A (80C, 80CCC, 80CCD) LIMIT				
Provident Fund	80C		28800	

House Rent Details

User needs to click on the 'Add New' button to enter house rent details.

HOUSE RENT PAID / PAYABLE DIRECTLY BY YOU				
Date From	To	Rent Per Month	LandLord Name (Pan Card)	Metro
No Record found				
+ Add New				

Data entry screen will be displayed as shown below:

HOUSE RENT

Please enter rental details applicable for this financial year according to Rent Agreement.
e.g. Period 01-04-2022 - 31-03-2023 Rent per month: 10000

Rent Period

From 01-04-2022 To 31-03-2023

Rent Per Month 10000

Total Rent for the Period 120000

Address ABC Area, A Landmark.

Where is this property located ?

☐ Metro (Delhi, Mumbai, Chennai, Kolkata)

☒ Non-Metro

Note : If the rent per month exceeds Rs. 8333, Landlord PAN or declaration from Landlord is required.

LANDLORD 1 LANDLORD 2 LANDLORD 3 LANDLORD 4

Landlord Name Mr. Navin

Landlord PAN AFPPT1231A

Cancel Update

By default, property location would be Non-Metro City.

In case property location is Delhi, Mumbai, Chennai or Kolkata then user has to select 'Metro'.

For deduction of Income Tax under section 192 – **“Valid Land Lord PAN No.” is mandatory.**

Once all details are entered, user has to click on the Update and it will display in the main screen as shown below.

HOUSE RENT PAID / PAYABLE DIRECTLY BY YOU				
Date From	To	Rent Per Month	LandLord Name (Pan Card)	Metro
01-04-2022	31-03-2023	10000.00	Mr. Navin(AFPPT1231A)	No
+ Add New				

If user has multiple rental periods and amounts paid in a year then he/ she has to update accordingly by clicking on 'Add New' button.

Income from Other Sources

User can enter income from other sources in the 'Income from Other Sources' section.

INCOME FROM OTHER SOURCES	
Interest On NSC	NSC Calculator <input type="text" value="0"/>
Bank Interest on Saving Account	<input type="text" value="10000"/>
Bank Interest on Deposits	<input type="text" value="20000"/>
Any other Income (except capital gain/loss)	<input type="text" value="0"/>

Income from House Property

User can enter the income details from house property in the 'Income from House Property' section as shown in the screen below:

INCOME / LOSS FROM HOUSE PROPERTY
<input type="checkbox"/> 1. Self Occupied Property <input type="checkbox"/> 2. Let Out Property

1. Self-Occupied Property

User can mention the details of property where he/ she is currently staying and or in case of joint property (co-owners), then the share percentage has to be mentioned.

INCOME / LOSS FROM HOUSE PROPERTY	
<input checked="" type="checkbox"/> 1. Self Occupied Property <input checked="" type="checkbox"/> I am the co-owner of the house.	
The Amount Claimed below is <input type="text"/> % of the total interest on housing loan	
Loan sanction date :	<input type="text" value="Select date"/> Required for availing deduction u/s 80EE or 80EEA <u>more info</u>
Have you received possession ?	<input type="radio"/> Yes <input type="radio"/> No
Interest On Loan : 0	
Lender (Bank) Name	Lender Address
Lender PAN	Interest
No Record found	
<input type="button" value="Add New"/>	
Pre-EMI Interest On Loan : (Add 1/5 of pre-EMI interest if any) 0	
Lender (Bank) Name	Lender Address
Lender PAN	Interest
No Record found	
<input type="button" value="Add New"/>	
Housing interest deduction under section 24 (Max 2,00,000) : 0	

Example of Section 80 EE

INCOME / LOSS FROM HOUSE PROPERTY

☒ 1. Self Occupied Property

☒ I am the co-owner of the house.

The Amount Claimed below is % of the total interest on housing loan

Loan sanction date : Required for availing deduction u/s 80EE or 80EEA [more info](#)

Have you received possession ? ☒ Yes ☐ No

Possession date :

Address :

Interest On Loan : 300000

Lender (Bank) Name	Lender Address	Lender PAN	Interest
HDFC (AAACH0997E)	Sample Address	AAACH0997E	300000.00

[+ Add New](#)

Pre-EMI Interest On Loan : (Add 1/5 of pre-EMI interest if any) 0

Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			

[+ Add New](#)

Housing interest deduction under section 24 (Max 2,00,000) : 200,000



Lender Bank Details to be updated.

HOUSING LOAN LENDER INFO

Lender:

Lender Name:

Lender Address:

Lender PAN:

Interest Amount:

[Cancel](#) [Update](#)

Please click on the “More Info” for details.

80EE: Additional deduction of Rs. 50,000 is eligible if the loan sanctioned date is between 01.04.2016 to 31.03.2017 and loan amount is less than 35,00,000 and property value is less than 50,00,000

80EEA: Additional deduction of Rs. 150,000 u/s 80EEA is eligible if the loan sanctioned date is between 1 April 2019 to 31 March 2022 and property value is less than 45,00,000

Required for availing deduction u/s 80EE or 80EEA [more info](#)

Example of Section 80 EEA**a. Example – In case of, No Possession**

INCOME / LOSS FROM HOUSE PROPERTY

☒ 1. Self Occupied Property

☒ I am the co-owner of the house.

The Amount Claimed below is % of the total interest on housing loan

Loan sanction date : Required for availing deduction u/s 80EE or 80EEA [more info](#)

Have you received possession ? ☐ Yes ☒ No Please note that no deduction will be allowed u/s 24 for interest on housing loan since possession is not received

Interest On Loan : 300000

Lender (Bank) Name	Lender Address	Lender PAN	Interest
HDFC (AAACH0997E)	Sample Bank	AAACH0997E	300000.00

[Add New](#)

Pre-EMI Interest On Loan : (Add 1/5 of pre-EMI interest if any) 0

Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			

[Add New](#)

Housing interest deduction under section 24 (Max 2,00,000) :

Since your house is purchased in you may be eligible for additional deduction upto 1,50,000 under section 80EEA

Do you wish to enter additional details and check? ☒ Yes ☐ No

Property value ☒ Upto 45,00,000 ☐ More than 45,00,000

Housing interest deduction under section 80EEA :

Note:

Since your house purchased in **2019-22** (means)
This is applicable from 1st April 2019 to 31st March 2022

[Go Top](#)**b. Example – In case of, Received the Possession**

INCOME / LOSS FROM HOUSE PROPERTY

☒ 1. Self Occupied Property

☒ I am the co-owner of the house.

The Amount Claimed below is % of the total interest on housing loan

Loan sanction date : Required for availing deduction u/s 80EE or 80EEA [more info](#)

Have you received possession ? ☒ Yes ☐ No

Possession date :

Address :

Interest On Loan : **300000**

Lender (Bank) Name	Lender Address	Lender PAN	Interest
HDFC (AAACH0997E)	Sample Bank	AAACH0997E	300000.00

[+ Add New](#)

Pre-EMI Interest On Loan : (Add 1/5 of pre-EMI interest if any) **0**

Lender (Bank) Name	Lender Address	Lender PAN	Interest
No Record found			

[+ Add New](#)

Housing interest deduction under section 24 (Max 2,00,000) : **200,000**

Since your house is purchased in **2019-22** you may be eligible for additional deduction upto 1,50,000 under section 80EEA

Do you wish to enter additional details and check? ☒ Yes ☐ No

Property value ☒ Upto 45,00,000 ☐ More than 45,00,000

Housing interest deduction under section 80EEA : **100,000**

Note:

Since your house purchased in **2019-22** (means)
 This is applicable from 1st April 2019 to 31st March 2022

2. Let Out Property

User has to provide the details of property which has been given on rent, if any.

For let out property details, user has to click on the “Add New” button and the screen will be displayed to update the details.

☒ 2. Let Out Property

Total :					0
Rent Received	Municipal Taxes	Less 30%	Interest	Total Income	
No Record found					

LETOUT PROPERTY

Let Out property address *

Sample Address2

Total income/loss from this property (A-B-C-D)

115500.00

A) Rent received or rent of similar property in the similar locality (Per annum)*

200000

B) Less Municipal taxes paid (Per annum)

35000

C) Less 30% on (A-B)

49500

D) Interest on loan (Add 1/5 of pre-EMI interest if any)

Cancel

Update

Once details are updated, it will display on the main screen as shown below:

☒ 2. Let Out Property

Total :					115500.00
Rent Received	Municipal Taxes	Less 30%	Interest	Total Income	
200000.00	35000	49500	0.00	115500.00	

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In case of **Interest on Loan of Let Out Property** has been updated for calculation then – as per Income Tax section 192 – **“Valid PAN No. of the Lender or Bank” is mandatory**. Snap shot given below:

LETOUT PROPERTY

Let Out property address *

Sample Address2

Address of the lender or bank

Sample Address3

A) Rent received or rent of similar property in the similar locality (Per annum)*

200000.00

B) Less Municipal taxes paid (Per annum)

35000

C) Less 30% on (A-B)

49500

D) Interest on loan (Add 1/5 of pre-EMI interest if any)

30000

Lender *

HDFC (AAACH0997E)

Name of the lender or bank*

HDFC (AAACH0997E)

PAN of the Lender or bank*

AAACH0997E

Loan Amount*

1500000



Total income/loss from this property (A-B-C-D)

85500.00

Cancel

Update

Once details are updated, it will display on the main screen as shown below:

<div> <div>2. Let Out Property</div> </div>					
Total :					85500.00
Rent Received	Municipal Taxes	Less 30%	Interest	Total Income	
200000.00	35000	49500	30000	85500.00	 
<div> <div>Add New</div> </div>					

LTA Details

User can enter the LTA details under 'Leave Travel Assistance Details' section as shown below.

LEAVE TRAVEL ASSISTANCE DETAILS

Route

Mumbai - Delhi

Accompanied by

Self & Wife

Leave Period

From

21-10-2022

—

To

25-10-2022

Trip duration

From

21-10-2022

—

To

25-10-2022

Total :

26000.00

Travel Date	Mode	From City	To City	Narration	Amount
21-10-2022	Air	Mumbai	Delhi	Sample A	15000
25-10-2022	Train	Dehli	Mumbai	Sample B	11000

+ Add New

Attach Proofs

Actual Declaration is a proof of investments made during the financial year; hence user should attach the proofs.



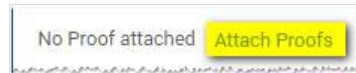
NO Attachments

In case, user submits the Actual Declaration without attachments then system will prompt for the confirmation for further activity.

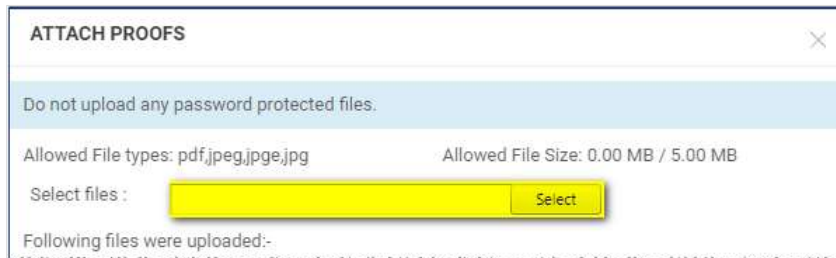


Attachments

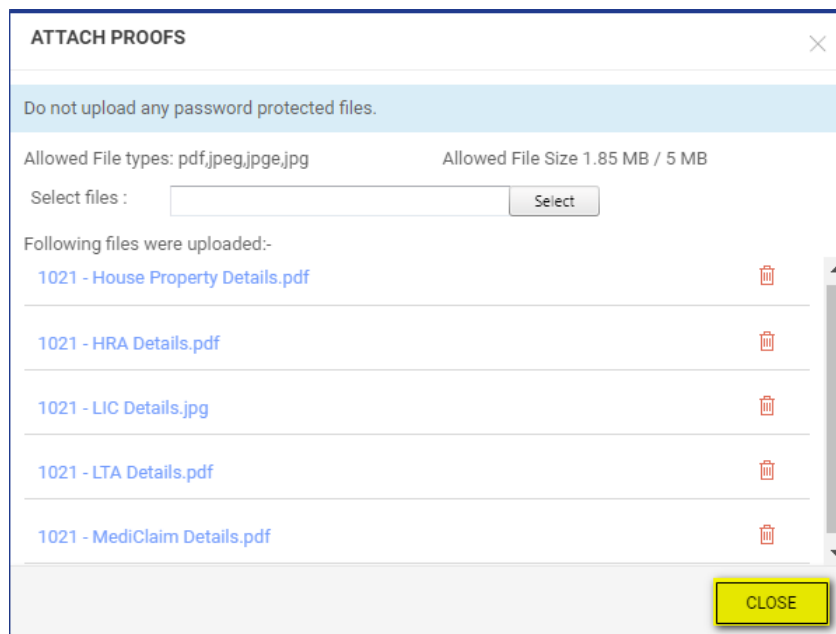
Click on the “Attach Proofs” ...



Attach Proofs option will be displayed to select the files.



Once the attachments are done then click on the “Close” button.



[Go Top](#)**Submit/ Save as Draft**

Actual Investment Declarations can be kept in “Save as Draft”.

INVESTMENT DECLARATION (ACTUAL)

Name : A Kumar | PAN : ABDPT1231A

Save as Draft Submit

In case of “Save as Draft”, system will show the message as displayed below:

Declaration saved as draft.

CLOSE

Status will be shown accordingly.

INVESTMENT DECLARATION (ACTUAL)

✓ Subscribed to old tax regime

Estimated Actual

This Year Last Year Prior Years

Type	Submitted On	Uploaded On	Status	Detail
Actual	-	-	Not yet submitted	

Your actual declaration is not yet submitted. You can still make corrections if required.

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On the completion of keying all the details, needs to click on the Submit button.

INVESTMENT DECLARATION (ACTUAL)

Name : A Kumar | PAN : ABDPT1231A

[Save as Draft](#) [Submit](#)

System will prompt for the confirmation of Save as Draft or Submit and Preview or Submit.

CONFIRMATION

⚠ Are you sure you want to submit ?
Once submitted, you cannot make any changes.

[Save as Draft](#) [Submit and Preview](#) [Submit](#)

User could take the required action i.e., Submit and Preview or Submit.

User can preview the declaration report – i.e., Form 12BB.

FORM NO.12BB
(See rule 26C)

Sample pdf download - Form 12BB

FORM NO.12BB
(See rule 26C)

Statement showing particulars of claims by an employee for deduction of tax under section 192

Demo Company Ltd.

Employee	1021 - A Kumar	Declaration No	2
Employee Address			
F.Y.	2022 - 23	PAN No.	ABDPT1231A
		Declaration Dt.	24-Nov-2022

Chapter VI-A

Payment made for preventive Health Checkup(Parent) 5000.00

Description	Section	Option	Limit	Deducted From Salary	Actual Investments	
Section 80EEB	80EEB		150000	0	150000.00	
Rct No	RctDate	Name	Relation	IssuedBy	Paid	Amount
123	15-Aug-2022	A Kumar	Self	EV Details	Yes	150000.00

Continued on next page....

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Sect. 80D (Mediclaime-Self)	80D.1	Self, Spouse & Children	25000	0	18000.00	
Sect. 80D (Mediclaime-Parents)	80D.2	Medical Expenditure	50000	0	30000.00	
Sect. 80U (Handicapped)	80U	Disability 40-80%	75000	0	75000.00	
Sect. 80E (Education Loan)	80E		0	0	100000.00	
Rct No	RctDate	Name	Relation	IssuedBy	Paid	Amount
123	15-Apr-2022	A Kumar	Self		Yes	100000.00
Lender Name : State Bank Of India (SBI) (AAACS8577K)			Lender PAN : AAACS8577K			

Chapter VI-A (80CCE)

Description						Section	Deducted From Salary	Actual Investments
Provident Fund							28800.00	0.00
Life Insurance Premium							0.00	15000.00
Rct No	RctDate	Name		Relation	IssuedBy	Paid	Amount	
123	30-Jun-2022	A Kumar		Self	LIC	Yes	5000.00	
234	30-Sep-2022	A Kumar		Self	LIC	Yes	5000.00	
345	18-Nov-2022	A Kumar		Self	LIC	Yes	5000.00	
Total (43800.00)							28800.00	15000.00

House Rent

Land Lord	Land Lord PAN	From Date	To Date	Rent Per Month	Metro City
Mr.Navin	ABCDP1231A	01-Apr-2022	31-Mar-2023	10000.00	No
Address : ABC Area, A Landmark					

Income from Other Sources

Bank Interest on Savings Account	10000.00
Bank Interest on Deposits	20000.00

Income / Loss from House Property

Self Occupied Property
I am the co-owner of the house and I am claiming 50% of the total interest on loan.
Printed On 24/11/2022 04:46:33:PM

Interest on Housing Loan		Purchased after 1999 (Limit: 200,000)		300000.00
Lender Name	Lender Address	Lender PAN No.	Amount	
HDFC (AAACH0997E)	Sample Bank	AAACH0997E	300000.00	
Additional Interest u/s 80EEA		150000	100000.00	
Possession Date	15-12-2020			
Address	Sample Address			
Let Out Property				
Rent Received	Municipal Taxes	Less 30%	Interest	Total Income
200000.00	35000.00	49500.00	30000	85500.00
Lender Name : HDFC (AAACH0997E)		Lender PAN No. : AAACH0997E		
Lender Address : Sample Address3				

Continued on next page....

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Leave Travel Assistance Details					
Route	Mumbai - Delhi		Leave Period	21-Oct-2022 - 25-Oct-2022	
Accompanied By	Self & Wife		Trip Period	21-Oct-2022 - 25-Oct-2022	
Travel Date	From City	To City	Mode	Particulars	Amount
21-Oct-2022	Mumbai	Delhi	Air	Sample A	15000.00
25-Oct-2022	Dehli	Mumbai	Train	Sample B	11000.00
Total					26000.00

I confirm that my employer has explained to me the relevant provisions of Income Tax Act for being eligible to claim the above reliefs and I have complied with all of them. If any additional tax liability arises due to deficiency in the above, I will be solely liable for the same.

I, A Kumar ,son/daughter of..... do hereby certify that the information given above is complete and correct.

Signature

Name A Kumar


Date 24/11/2022 04:46:33:PM

Auto attachment of form 12BB (If Enabled)

System will show the confirmation message to the User while submission of Actual Declaration, if “Auto attachment of form 12BB” parameter is enabled by the System Admin.

Form 12BB will get auto attached at the time of submission of Actual Declaration. The auto attached Form 12 BB will be treated as electronically signed.

CONFIRMATION

 Are you sure you want to submit ?
Once submitted, you cannot make any changes.

According to company policy, before you submit this declaration, you are required to view Form 12BB that is generated based on your investments.

Once you view Form 12BB and click on the submit button, it will be treated as electronically signed.

View Form 12BB

Save as Draft

Submit

Approver will be also able to view/ download the Form 12BB during the Approval of declaration.

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View Status

User can view the status of the declaration in his/ her ESS screen under investment declaration.

On Submission ...

INVESTMENT DECLARATION (ACTUAL) ×

Subscribed to old tax regime

Estimated **Actual**

This Year Last Year Prior Years

Type	Submitted On	Uploaded On	Status	Detail
Actual	24-Nov-2022	-	Waiting for approval	

Thank you for submitting investment declaration online.

On Approval ...

INVESTMENT DECLARATION (ACTUAL) ×

Subscribed to old tax regime

Estimated **Actual**

This Year Last Year Prior Years

Type	Submitted On	Uploaded On	Status	Detail
Actual	24-Nov-2022	-	Approved	Show Approved Details

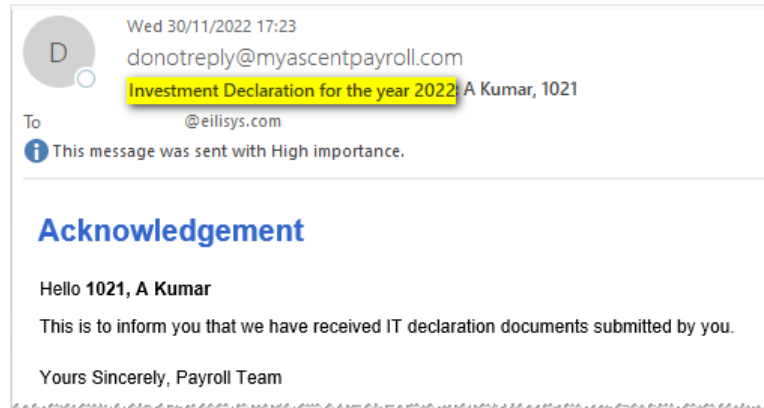
Thank you for submitting investment declaration online.

[Go Top](#)

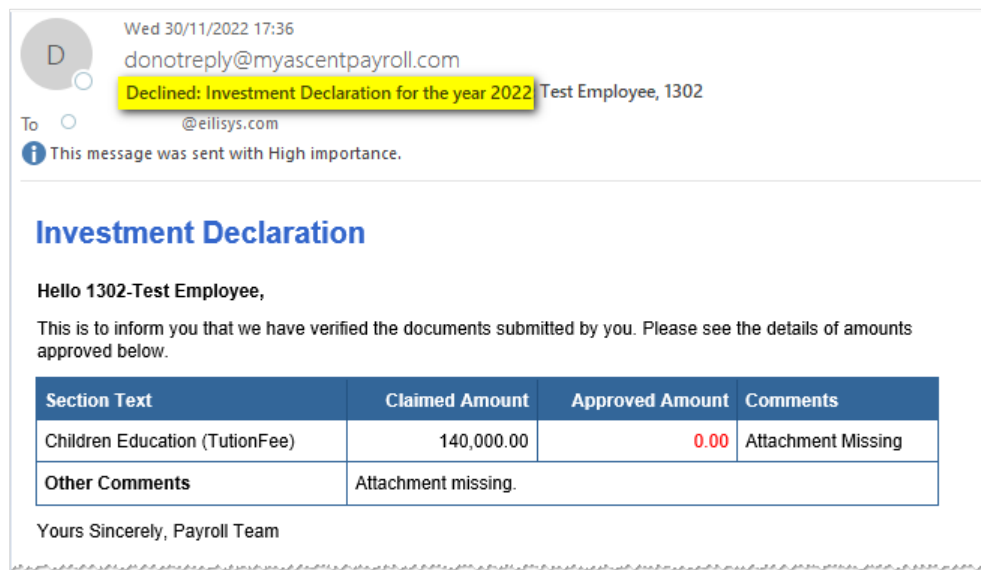
Email Notification on Approval / Declined

User will receive an email notification for Acknowledgement/ Declined/ Correction Required/ Partially Approved/ Approved Investment Declaration. Sample of email notification given below for reference.

Example 1 – Acknowledgement



Example 2 – Declined



[Go Top](#)**Example 3 – Correction Required**

Thu 01/12/2022 17:04
donotreply@myascentpayroll.com
Correction Required: Investment Declaration for the year 2022 Emp Name 1012, 1012
To @eilisys.com
This message was sent with High importance.

Investment Declaration

Hello 1012-Emp Name 1012,

This is to inform you that below section(s) of your investment declaration need some correction.

Section Text	Claimed Amount	Comments
Sect. 80D (Medicaid-Self)	25,000.00	Attachment Missing
Preventive Health checkup (Parent)	5,000.00	Attachment Missing
Other Comments	Re-submit with the correct details & attachments.	

Yours Sincerely, Payroll Team

Note: Only correction require fields email notification will be sent to the employee.

Example 4 – Partially Approved

Thu 01/12/2022 17:43
donotreply@myascentpayroll.com
Partially Approved: Investment Declaration for the year 2022 Kumar, 1002
To @eilisys.com
This message was sent with High importance.

Investment Declaration

Hello 1002-Kumar,

This is to inform you that we have verified the documents submitted by you. Please see the details of amounts approved below.

Section Text	Claimed Amount	Approved Amount	Comments
Sect. 80D (Medicaid-Self)	20,000.00	20,000.00	OK
Interest on Deposits	10,000.00	0.00	Attachment Missing
Other Comments	Attachment Missing		

Yours Sincerely, Payroll Team

Example 5 – Approved

Wed 30/11/2022 17:35
 donotreply@myascentpayroll.com
 Approved: Investment Declaration for the year 2022-A Kumar, 1021
 To: @ellisys.com
 This message was sent with High importance.

Investment Declaration

Hello 1021-A Kumar,

This is to inform you that we have verified the documents submitted by you. Please see the details of amounts approved below.

Section Text	Claimed Amount	Approved Amount	Comments
Life Insurance Premium	5,000.00	5,000.00	
Life Insurance Premium	5,000.00	5,000.00	
Life Insurance Premium	5,000.00	5,000.00	
Section 80EEB	150,000.00	150,000.00	
Sect. 80D (Mediclaime-Self)	18,000.00	18,000.00	
Sect. 80D (Mediclaime-Parents)	30,000.00	30,000.00	
Sect. 80U (Handicapped)	75,000.00	75,000.00	
Sect. 80E (Education Loan)	100,000.00	100,000.00	
Preventive Health checkup (Parent)	5,000.00	5,000.00	
LTA	15,000.00	15,000.00	
LTA	11,000.00	11,000.00	
Interest on Deposits	20,000.00	20,000.00	
Interest on Savings A/c	10,000.00	10,000.00	
House Rent	10,000.00 per month (01-Apr-22 - 31-Mar-23)	10,000.00 per month (01-Apr-22 - 31-Mar-23)	
Housing Interest (Loan)	300,000.00	300,000.00	
Additional Interest u/s 80EEA	100,000.00	100,000.00	
Let out Property	85,500.00	85,500.00	
Other Comments	Submitted details are Approved.		

Yours Sincerely, Payroll Team