

# SMART TAX INVESTMENT PROOF SUBMISSION

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Allsec introduces new module for submission of Tax Investment proofs in Employee Self Service portal.

Follow the simple steps mentioned below and update your investment proof breakup in the Allsec ESS web portal.

**Step 1: Declare Investments**

**Step 2: Create Investment Master**

**Step 3: Update Investment Breakup**

- Log on to Allsec ESS Portal
- Select Tax under Employee Links and click Tax Online Submission **Tax -> Tax Online Submission**


**Step-1 Declare Investments :** Click the link “Add/Edit Declarations” to add new declarations or to modify existing declarations.

**Step-2 Create Investment Master :** Master needs to be created first for any new investments. Investment Master Creation is a one-time activity as it keeps track of your investments and saving time for re-entry.

**Step-3 Update Investment Breakup :** Investment Breakup needs to be updated with current year payment details.

# Smart Tax Investment Proof Submission


 SMART TAX INVESTMENT  
PROOF SUBMISSION

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Form 12BB/Tax Proof Page Download


 Add/Edit Declarations


Index

Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Life Insurance Premium	0	24	0	...	...
Public Provident Fund	0	10	0	...	...
National Savings Certificates	0	1	0	...	...
Annuity Plan	0	1	0	...	...
Equity Linked Savings Scheme / Mutual Fund	0	1	0	...	...
Housing Loan Principal Repayment	0	1	0	...	...
80D - Medical Insurance	0	1	0	...	...
80DD - Disabled Dependant	0	1	0	...	...
80U - Self with Physical Disability	0	1	0	...	...
Rent	0	12	0	...	...
Interest on Housing Loan	0	2	0	...	...
Other Income	0	2	0	...	...
Previous Employment Income (Gross Income)	0	3	0	...	...
Sec 10 - Exemption	0		0		
Salary after sec. 10	0		0		
Tax on employment (PT)	0		0		
PF contribution	0		0		
Tax Deducted at Source	0		0		
80E - Interest on Education Loan	0	1	0	...	...
<b>Total</b>	<b>0</b>	<b>61</b>	<b>0</b>		

Select new Investment Type

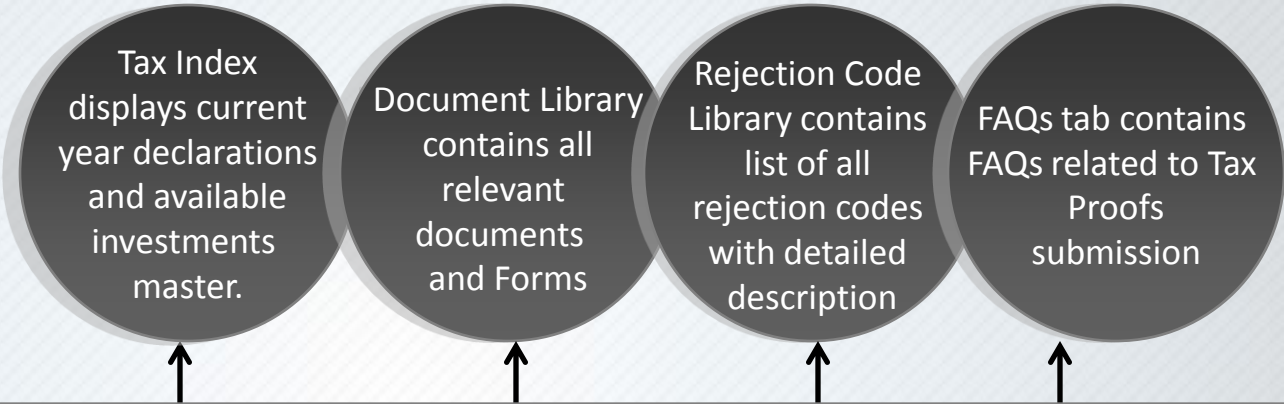
Add to Index Grid


 Declare Investments


 Create Investment Master


 Update Investment Breakup








 SMART TAX INVESTMENT  
PROOF SUBMISSION


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 Add/Edit Declarations

Index

Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Rent	0	12	0	...	...
Total	0	12	0		


Select new Investment Type


--Select--


▼


Add to Index Grid


# Step 1: Declare Investments


 **SMART TAX INVESTMENT  
PROOF SUBMISSION**


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 **Add/Edit Declarations**

**Index**

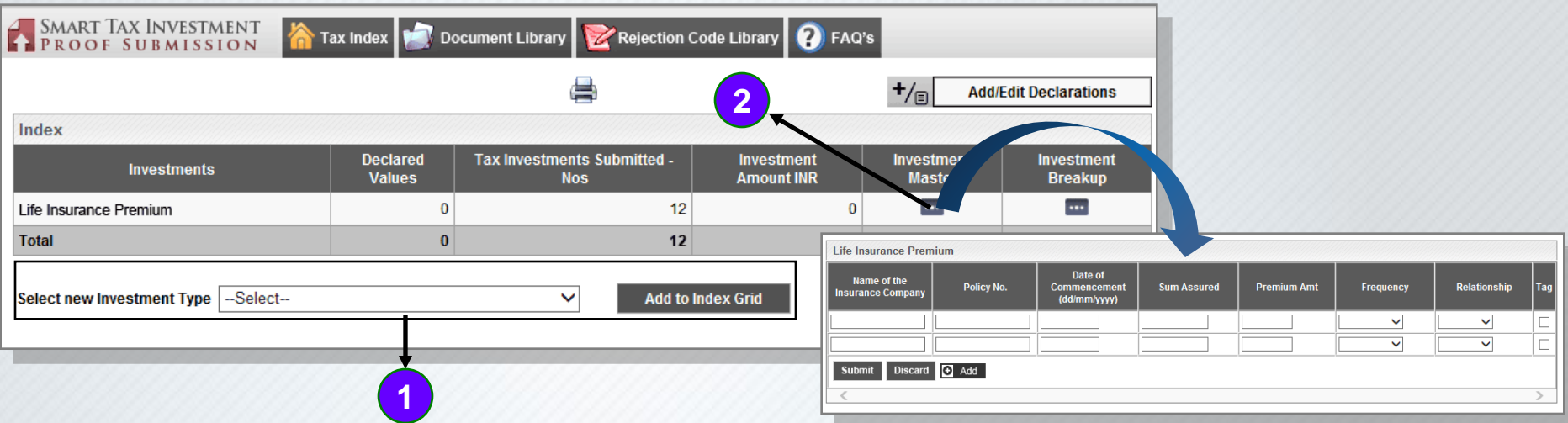
Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Life Insurance Premium	0	12	0	...	...
<b>Total</b>	<b>0</b>	<b>12</b>	<b>0</b>		





Select new Investment Type



Add to Index Grid


**1** Click link “Add/Edit Declarations” to add new declarations or to modify existing declarations.


## Step 2: Create Investment Master



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  **Add/Edit Declarations**

Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Life Insurance Premium	0	12	0		***
<b>Total</b>	0	12			

Select new Investment Type   **Add to Index Grid**

**Life Insurance Premium**

Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Frequency	Relationship	Tag
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

**Submit** **Discard**  **Add**

- **1** To add new investments, select the investment type from drop down list “Select new Investment Type” and then click “Add to Index Grid” button.
- **2** Click ellipse button against respective Investment Type under Investment Master to create/edit Investment Master details.

## Step 2: Create Investment Master - Contd.





Life Insurance Premium							
Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Frequency	Relationship	Tag
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="checkbox"/>
<input type="button" value="Submit"/>	<input type="button" value="Discard"/>	<input type="button" value="+ Add"/>					



3 2 1

- “Add” button can be used to create master record if there is more than one investment under respective investment type. Refer **1** in picture above.
- Expired/ Unused investments can be permanently removed from Investment master using "Discard" button. Any such removed investments will be moved to "Discarded Investments" section which can only be viewed and cannot be edited. Refer **2** in picture above.
- Click Submit to save latest changes done. Refer **3** in picture above.
- Click “Tax Index” tab to proceed with other updates.




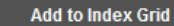
# Step 3: Update Investment Breakup

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
  **Add/Edit Declarations**

**Index**

Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Life Insurance Premium	0	12	0	***	***
<b>Total</b>	<b>0</b>	<b>12</b>			



Select new Investment Type   

**Life Insurance Premium**



Declaration  Proof  Cleared

Name of the Insurance Company	Policy No.	Premium Amt	Number of Installment Paid on or after 1st Apr 13 (Count)	Number of Installment Payable on or before 31st Mar 14 (Count)	Amount Paid on or after 1st Apr 13(Amt)	Amount Payable on or before 31st Mar 14(Amt)	Total Amount FY 13-14 (Paid Amt+Payable Amt)	Tag
LIC	330489787	9377	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
LIC	121562106	3136	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
SBI Life	43001059 010	12000	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
LIC	714112937	6649	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

- 1 Click ellipse button against respective Investment Type under Investment Breakup to update current year payment details.

## Step 3: Update Investment Breakup – contd.

Life Insurance Premium

Guidelines

1

Declaration

0

Proof

0

Cleared

0

Name of the Insurance Company	Policy No.	Premium Amt	Number of Installment Paid on or after 1st Apr 13 (Count)	Number of Installment Payable on or before 31st Mar 14 (Count)	Amount Paid on or after 1st Apr 13(Amt)	Amount Payable on or before 31st Mar 14(Amt)	Total Amount FY 13-14 (Paid Amt+Payable Amt)	Tag
LIC	330489787	9377						<input type="checkbox"/>
LIC	121562106	3136						<input type="checkbox"/>
SBI Life	43001059 010	12000						<input type="checkbox"/>
LIC	714112937	6649						<input type="checkbox"/>

Submit

Discard

2

3

- “Guidelines” link displays Guidelines and documents required for Tax Proofs FY 16-17. Refer 1 in picture above.
- Update current year payment details and click “Submit” to save the entries. Refer 2 in picture above.
- Transaction record can be deleted/removed using “Discard” button. Refer 3 in picture above.
- Discarded transactions will be displayed under “Discarded Investments” section.

## Step 3: Update Investment Breakup – contd.

Discarded Investments									
S.No	Tag	Name of the Insurance Company	Policy No.	Premium Amt	Number of Installment Paid on or after 1st Apr 13 (Count)	Number of Installment Payable on or before 31st Mar 14 (Count)	Amount Paid on or after 1st Apr 13(Amt)	Amount Payable on or before 31st Mar 14(Amt)	Total Amount FY 13-14 (Paid Amt+Payable Amt)
1	<input type="checkbox"/>	test1	1234r	100000	9	3	900000	300000	1200000
<b>Rollback</b>									


1

- Any of these discarded items can again be included by selecting “Tag” and clicking “Rollback” button. Refer **1** in picture above.

# Important Action

Print out of Allsec Tax Proof Page and Form 12BB PDF to be taken and duly signed and submitted along with your investment supporting.

NO PROOF will be considered without it being updated at the Allsec Tax Proof submission page and duly signed Allsec Tax Proof submission page and Form12BB is submitted.

<div> <a href="#">User Manual</a> <a href="#">Form 12BB/Tax Proof Page Download</a> → <a href="#">Click this link to download/print Form12BB and Tax Proof Submission Page</a></div>					
Index					
Investments	Declared Values	Tax Investments Submitted - Nos	Investment Amount INR	Investment Master	Investment Breakup
Life Insurance Premium	0	2	80000	...	...
Public Provident Fund	0	2	100000	...	...
National Savings Certificates	0	0	20000	...	...



**Is there any change to the tax declaration process ?**

No There is no change to tax declaration process.

**Where can I get self declaration forms?**

You can download all relevant documents / Forms that can be used for current year proof submission from "Document Library".

**Can I update Investment Breakup without creating Investment Master?**

No Investment Master needs to be created first for any new Investments and then only you can update your Investment Breakup.

**Will my proofs be considered without updating Investment Breakup?**

No Proofs will be considered if Investment breakup not updated for current year.

**How do I know, what is the right document for each Tax Investment type?**

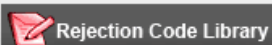
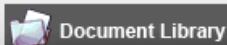
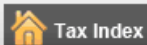
Refer "Guidelines" link available under Investment Breakup for each Investment type. In addition, you may also refer "Documents/Forms required for Tax Proofs FY 16-17" file available under Document Library.

**What is Rejection Code Library?**

Rejection Code Library contains list of all rejection codes with detailed description and can be referred at the time of clearance status upload.

**Contd..**

**For more FAQs, Read the FAQ's provided in Tax Proof Page prior to updating your Tax proof details. For any further queries raise a request on the website.**



## Frequently Asked Questions

**Q1 : Is there any change to the Tax declaration process?**

**Ans :**No. There is no change to Tax declaration process.

**Q2 : What is the timelines for this process?**

**Ans :**Refer Timelines section available in Allsec ESS Portal Home page

**Q3 : What is the procedure to update Tax proofs?**

**Ans :**Follow the below three steps and update your Investment proofs in the Allsec ESS web portal.

- Declare Investments
- Create Investment Master
- Update Investment Breakup

**Q4 : What is Tax Investment Master?**

**Ans :**Details that does not require change year-to-year and remains static is classified as Investment Master. e.g.: Under Life Insurance Premium - Name of insurance company, policy amount, date, premium amount etc. will not change year-to-year hence classified as Investment Master.

**Q5 : How to create/ update my Investment Master?**

**Ans :**Click ellipse button against respective Investment type under Investment Master Column in Tax Index page to create/update Investment Master.

**Q6 : Can I update Investment Breakup without creating Investment Master?**

**Ans :**No Investment Master needs to be created first for any new Investments and then only you can update your Investment Breakup.

**Q7 : How do I update my current year payment details?**

**Ans :**Click ellipse button against respective Investment type under Investment Breakup column in Tax Index Page to update current year payment details.

**Q8 : What should I do if I have used maximum number of records allowed for a particular Investment type?**

**Ans :**You can club two or more Investment details in the same row by updating the key fields separated by comma under Investment Master. The same will be considered during Tax Proofs validation.

**Q9 : How can I discard any expired/unused Investments Master?**

**Ans :**Expired/ Unused Investments can be permanently removed from Investment Master using "Discard" button. Any such removed Investments will be moved to "Discarded Investments" section. These details can be viewed and cannot be edited.

Clearance status will be uploaded as per the timelines circulated to you and you can check for your Tax proof clearance against each Investment type.

