



Investment Proof Submission FY 2017-18

User Manual – Employees



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Winners of the HRO today APAC award for two consecutive years.



Investment Proof Submission Process Guidelines



Dear Employee,

This is with reference to the submission of Investment Proofs for the current financial year 2017-2018.

The interface designed for collecting investment Proofs ensures seamless communication between the employees and the Business Partner (PeopleStrong) keeping in mind the timely response and accuracy levels.

Proof Submission window will be opened on ESS portal on 28-Dec-17 for all employees to declare investment details.

The last date for submission of Investment proofs for the FY 2017-18 is **20-Jan-18**. The Salary Payouts for February & March 2018 shall be based on the income tax computation arrived at after incorporating the actual investment proofs submitted & approved.

Please read this communication carefully. It contains detailed guidelines of proofs submission. Please keep the soft copies of the investments/Rent Receipts/Premium receipts and other proofs ready before you login to ESS portal.



Investment Proof Submission Process



This user manual takes you through the Investment Proof Submission Procedure that needs to be submitted on the HRMS portal

You can access the HRMS portal by logging on to Portal

<https://peoplestrong.altran.com>





Investment Proof Submission Process Steps



Step 1:

Log on to the ESS using login credentials. (Same of viewing the Payslip)

Step 2:

- Please refer Investment Guidelines.
- Please enter actual values against every investment section.
- Once submitted no further editing/addition is allowed, so request you to click on submit once you have entered and check all your details thoroughly.
- In detailed guideline, supporting forms & ESS portal workflow for investment proof submission is attached in the ESS portal for your reference.
- Please mention "Investment Proof for FY 2017-18 (Employee ID)" as subject line for any investment queries for faster resolution.



Investment Proof Submission – Do's & Don'ts



DO's

1. Please refer Investment Proof Submission guidelines and portal workflow for your actual investment proof submission.
2. Please retain all original documents with you so that the same can be provided as and when required.
3. Documents to be uploaded should be in doc, docx, pdf, txt, xls, xlsx, zip, jpg, jpeg, png, gif and jpeg format only.
4. Document to be uploaded should be of less than 5MB size.

DON'Ts

1. Please do not leave the session idle for more than 10 minutes as the session will timed out thereafter.
2. Please do not leave your investment page without clicking on the "Submit" button stage as these stages will not consider for Tax Benefits.



Login Page – HRMS Portal



ALTRAN

Sign in with your organizational account

Sign in

Sign-in to Altran requires device registration. Use your login like europe\yourlogin.

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Investment Proof Submission Page – HRMS Portal



Go to home page → Payroll → Tax Declaration

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PROOF SUBMISSION FOR THE YEAR 2017-2018
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EMPLOYEE INFORMATION

EMPLOYEE CODE:	DM10537	Employee Name:	Rex Sirus
Date Of Joining:	Aug 12, 2011	Gender:	Male
Date Of Birth:	May 25, 1985	Pan Number:	TEMPP000D

CHAPTER VIA - SECTION 80D TO 80U

section Name	Max Amount	Declared Amount	Actual Amount	Document	Approved Amount	Approver Remark	ApproverAction
80CCD(1B): Additional Contribution towards National Pension Scheme (NPS)	50000	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text" value="0.0"/>	<input type="text"/>	Select ▼
80CCG: Rajiv Gandhi Equity Saving Scheme	50000	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text" value="0.0"/>	<input type="text"/>	Select ▼
80D: Mediclaim Premium of Self, Spouse and Children(Limit is 25000 if Age is less than 60 years and Limit is 30000 when age is greater than 60 years)	30000	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text" value="0.0"/>	<input type="text"/>	Select ▼
80D: Mediclaim Premium of Parents (Age below 60 years)		<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text" value="0.0"/>	<input type="text"/>	Select ▼

Investment Proof Submission Guidelines

Actual amount against the respective field

Attach the bills though have the provision



Investment Proof Submission Page – HRMS Portal



- Section 80C – Details need to capture as per valid proof submitted

Section Name	Max Amount	Declared Amount	Actual Amount	Approved Amount	Document	Approver Remarks
Contribution to Pension Fund(80CCC)	150000.00	<input type="text" value="0.00"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>
Payment of Tuition Fees (Maximum up to two children	150000.00	<input type="text" value="0.00"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>
Fixed deposits (FD) 5 Years and above	150000.00	<input type="text" value="0.00"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>
Life Insurance Premium	150000.00	<input type="text" value="6500.00"/>	<input type="text" value="6500.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>
Mutual Fund	150000.00	<input type="text" value="60000.00"/>	<input type="text" value="60000.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>
National Saving Certificates	150000.00	<input type="text" value="0.00"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach	<input type="text"/>



Investment Proof Submission Page – HRMS Portal



Only monthly rent paid amount needs to be mentioned

HOUSE RENT DETAILS

S.No.	From Date	To Date	City	Landlord Name	Address	Landlord PAN No	Declared Amount	Monthly Rent	Document
1	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach
2	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach
	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach
	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach
	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach
6	<input type="text"/>	<input type="text"/>	--Select--	<input type="text"/>	<input type="text"/>	<input type="text"/> PAN Not Available	0.0	<input type="text"/> 0.0	Attach

Enter the From date and to date of the rent period and attach the rent

Click on 'attach' button to attach proof document.



Investment proof Submission Page – HRMS Portal



INCOME FROM OTHER SOURCES

section Name	Maximum Amount	Declared Amount	Actual Amount	Document	Approver Remarks	ApproverAction
Income from other than Salary	No Limit	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach		Select ▼
Interest on Housing Loan (Letout)	200000	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	Attach		Select ▼
Interest on housing loan(Self)	200000	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>			

DECLARATION

☐ I hereby confirm that I have invested / contributed the above mentioned amounts for the purpose of rebate / deduction to be considered in calculating my income tax for the current Financial Year. I further undertake that wherever eligible investments are made in the name of spouse / children / dependent the same have been made out of my income and claim / rebate / deduction shall not be made by anybody else.

Click on 'Interest on Housing Loan (Letout and Self) link to enter the 'Loss from House Property'.

Enter the Housing loan interest amount on self occupied property.

Click on 'attach' button to attach proof document.

Note 1: Interest on housing loan(Self) – If you submitting a proof, Lender Name and Lender Pan is mandatory to update without that system will not allow you to save the window

Note 2: After Completion of all your Investment Proofs . Please check declaration box and Click on Submit Button to consider your Investment for Payroll Processing

FAQ



1. How Can I Declare 2nd Housing Loan?

If you have rented the 2nd home and you are getting some rent. Then, you will calculate net loss as: [Interest paid to bank – rent received + Tax paid to society and municipality]. Then put this amount in Interest On Housing Loan (Letout).

If you have not entered the 2nd home and you are not getting any rent, then house will be considered as “Deemed Let Out” and rent coming “Zero”. Then you will calculate net loss as [Interest paid to bank + Tax paid to society and municipality]. Then put this amount in interest on Housing Loan (Letout).

2. Can I Claim Both rent & Housing Loan?

a) You Live In Your Own House:

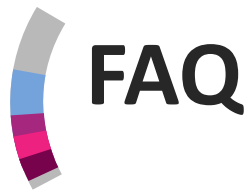
You have taken a home loan and residing in the house purchased with it. Since you are residing in your own house, you will not be able to claim HRA. However, you will be able to claim tax benefits on both, the principal and interest repaid on the home loan.

b) You Own A House In Another City:

If you reside in Mumbai but have bought an apartment in Chennai taking a home loan. You will be entitled to HRA exemption and tax benefits on both, the principal and interest repaid on the home loan.

c) You Own A House In Same City:

If you reside in Mumbai and have bought an apartment in Mumbai taking a home loan. You will not be entitled for both of the benefits, either one has to be taken, which in the above scenario will be home loan.



3. What if my LIC payment is due in Feb / March?

If your payment is due in Feb and March, then the premium paid receipt of Previous year has to be attached along with declaration Form for premium falling after cut off date.

4. Is Providing Pan Card copy of owner mandatory for Rent Exemption?

As per income tax for annual rent exceeding 1,00,000 pan card details are mandatory, if the owner has not provided with the pan card details, then a declaration signed by the owner is required in this effect.

5. When can I see the verified values?

Once we have verified the proof, an email will be triggered, you can then login to portal and check your details, effect for proof will be taken from February 2018 salary



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Have Questions?

1. Write in to payroll Helpdesk



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