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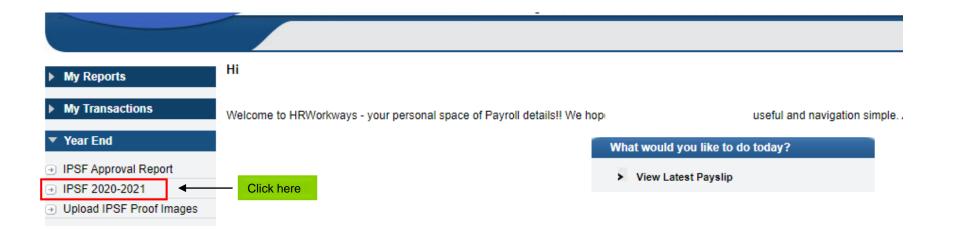
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# Section & Item Selection - Old Tax Regime

#### Section A - HRA

Rent paid details for claiming HRA exemption

#### Section B - Chapter VI A - Deductions from Total Income

- Medical Insurance (SEC80D)
- Medical Treatment/Handicapped Dependent (U/s 80DD)
- Interest on Educational Loan (U/s 80E)
- Permanent Physical Disability (80U)
- Medical Treatment of Specified Diseases (80DDB)
- Additional NPS Employee Contribution(80CCD1B)
- Electric Vehicle Loan Interest Benefit (U/s 80EEB)
- Donation to Political Party (U/s 80GGC)

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

- Contribution to Pension Fund (80CCC)
- Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc
- Public Provident Fund (PPF)
- National Savings Certificate (NSC)
- ✓ Infrastructure Bonds
- Children Education Tuition fees
- Equity Linked Savings Scheme (ELSS)
- Tax Saving Mutual Funds
- Unit Linked Insurance Plan
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- Sukanya Samriddhi Scheme
- Fixed Deposit Scheme (Block Period of 5 yrs)
- NSC Interest (Will also be considered as Other Income)

#### Section D - Housing Loan

- Loss from House Property SELF OCCUPIED
- Loss from House Property LETOUT



#### Section E - Previous Employer Details

Previous Employer Details

#### Section G - Other Income

Other Income

#### **Key Points:**

- Sections will be displayed basis the Tax Regime that you had already opted during investment declaration process.
- •Select (tick) the item within the section for which you wish to submit proofs and click on 'Proceed".

#### Note:

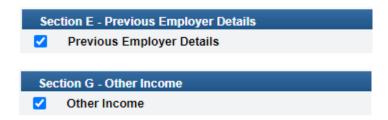
- If no section is selected, post click of 'Proceed' button, you will be able to see only 'Employee Details Screen' and IPSF confirmation can not be done.
- Selection of Investment categories will not be allowed after the final confirmation of IPSF.



# Section & Item Selection - New Tax Regime

# Section C - Chapter VIA - Section 80C NSC Interest (Will also be considered as Other Income) Section D - Housing Loan Loss from House Property - SELF OCCUPIED

Loss from House Property - LETOUT



#### **Key Points:**

- Sections will be displayed basis the Tax Regime that you had already opted during investment declaration process.
- •Select (tick) the item within the section for which you wish to submit proofs and click on 'Proceed".

#### Note:

- If no section is selected, post click of 'Proceed' button, you will be able to see only 'Employee Details Screen' and IPSF confirmation can not be done.
- Selection of Investment categories will not be allowed after the final confirmation of IPSF.





## Section & Item Selection

#### Section A - HRA Section E - Previous Employer Details Rent paid details for claiming HRA exemption **Previous Employer Details** Section B - Chapter VI A - Deductions from Total Income Section G - Other Income ⋖ Medical Insurance (SEC80D) Income Medical Treatment/Handicapped Deper Message from web page: Interest on Educational Loan (U/s 80E) · Go through the guidelines document regarding the proof submission Permanent Physical Disability (80U) Medical Treatment of Specified Disease shared through e-mail. Additional NPS Employee Contribution Please ensure to have all your investment proofs before proceeding Electric Vehicle Loan Interest Benefit ( further. Donation to Political Party (U/s 80GGC · Do not confirm the IPSF unless you fill the sections that are applicable Section C - Chapter VIA - Section 80C to you. Contribution to Pension Fund (80CCC · Use Save & View option for draft report. V Life Insurance Premium (Jeevan Dhara · Click on confirm button after updating the relevant proofs. Once you Public Provident Fund (PPF) will be displayed basis the Tax confirm the IPSF, the IPSF submission will be locked for editing. National Savings Certificate (NSC) it you had already opted during Infrastructure Bonds declaration process. Children Education Tuition fees Read this note Equity Linked Savings Scheme (ELSS) OK carefully and click Tax Saving Mutual Funds the item within the section for here to proceed Unit Linked Insurance Plan which you wish to submit proofs and click on NPS Employee Contribution 'Proceed". Sukanya Samriddhi Scheme Fixed Deposit Scheme (Block Period of 5 yrs) Note: NSC Interest (Will also be considered as Other Income) If no section is selected, post click of 'Proceed' button, you will be able to see only Section D - Housing Loan 'Employee Details Screen' and IPSF Loss from House Property - SELF OCCUPIED



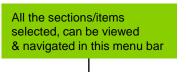
Selection of Investment categories will not be allowed after the final confirmation of IPSF.

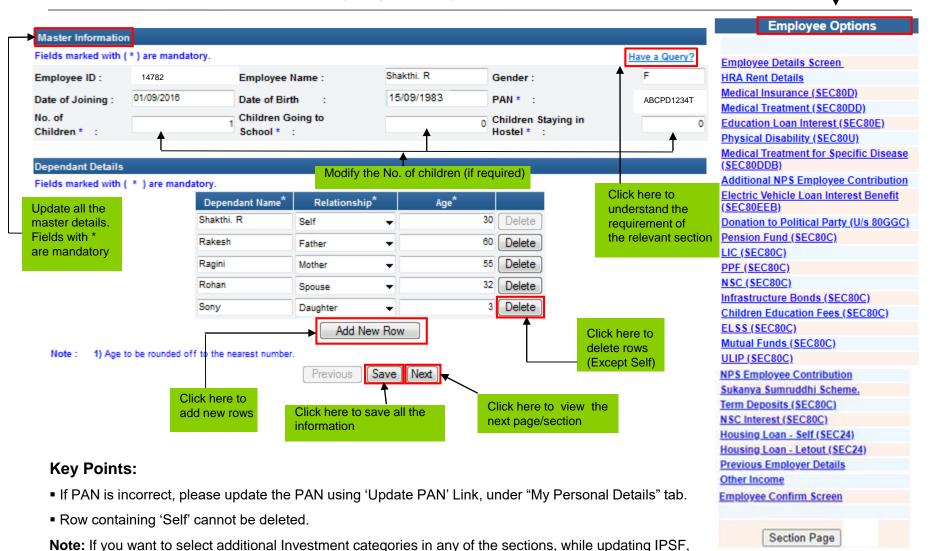
confirmation can not be done.



Loss from House Property - LETOUT

# Master Information & Employee Options







click on 'Section Page' tab under 'Employee Options'.

# Master Information – Sample Page

You will receive this Update for Master Details successfully saved. message upon 'saving' details on every screen Master Information Fields marked with (\*) are mandatory. Have a Query? Shakthi, R Employee ID: Employee Name: Gender: 14782 01/09/2016 15/09/1983 Date of Joining: Date of Birth PAN \* : ABCPD1234T No. of Children Going to O Children Staying in School \* : Hostel \* : Children \* : Father name is mandatory in Form 12BB. Please update Dependant Details the Father name, if the info is Fields marked with ( \* ) are mandatory. not available in Dependent Dependant Name\* Relationship\* Age\* Details. However. Father Name will be considered Shakthi. R 30 Delete Self ▼. from the Employee Master Rakesh Delete Father info, if it is not updated in the **IPSF** Dependant Details' Ragini Delete Mother screen. Rohan 32 Delete Spouse • Delete Sony Daughter Entering Dependents' details Add New Row is a one-time activity. This data will automatically Note: 1) Age to be rounded off to the nearest number. appear in the other screens Save Next Previous as applicable



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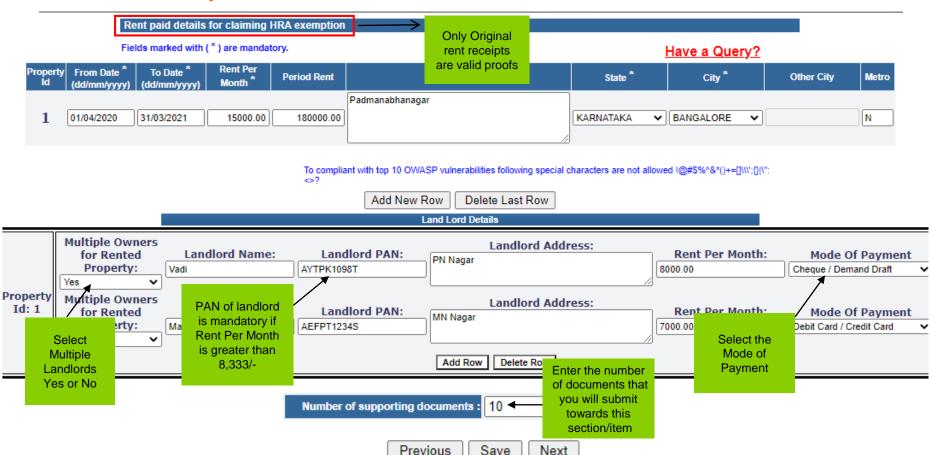
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# **HRA- Rent Payment Details**



- From & To Date must be within 1<sup>st</sup> April 2020 to 31<sup>st</sup> March 2021
- If you have joined the organization after 1st April 2020, then your DOJ becomes the 'From Date'
- Delhi, Mumbai, Chennai, & Kolkata are 'Metro' cities



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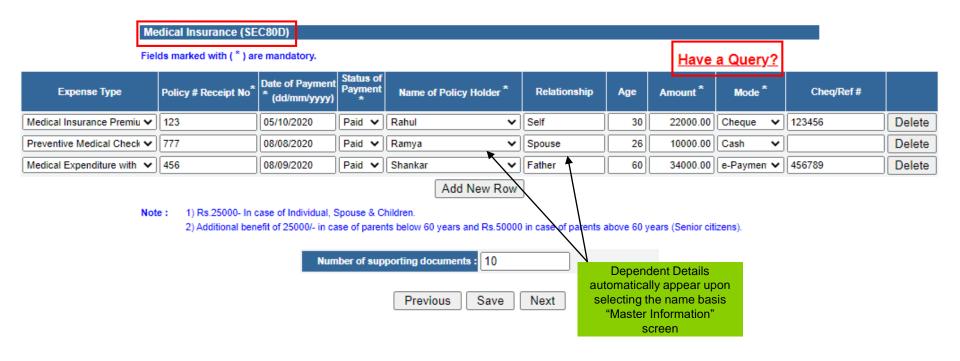
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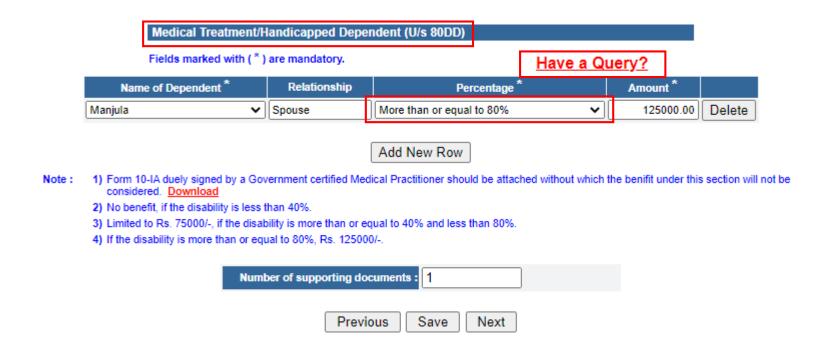
# Medical Insurance Premium (U/s 80D)



- Benefit under this section can be claimed for Self, Spouse, Children, & Parents
- Late Fee does not qualify for exemption.
- Medical expenditure incurred by an assessee on the health of a senior citizen aged 60 years and above can be claimed under the Expense Type "Medical Expenditure with No Insurance (Sr. Citizen)" provided that, no amount has been paid to effect or to keep in force an insurance on the health.



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

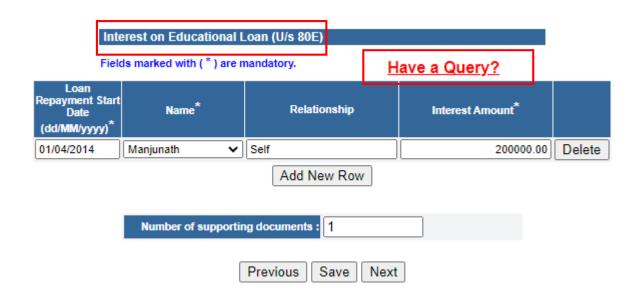


#### **Key Points:**

Benefit under this section can be claimed for Dependents only



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

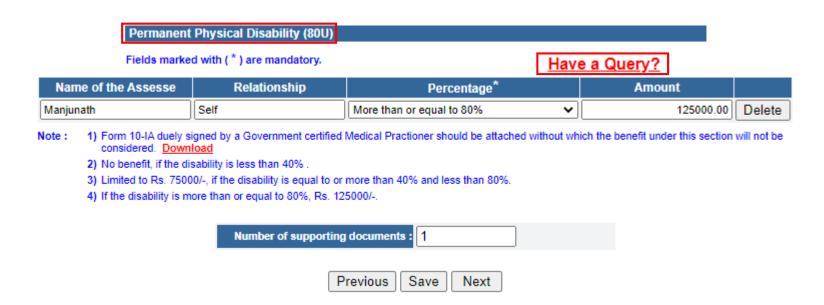


## **Key Points:**

■ Benefit under this section can be claimed for Self, Spouse, & Children



# Permanent Physical Disability (80U)

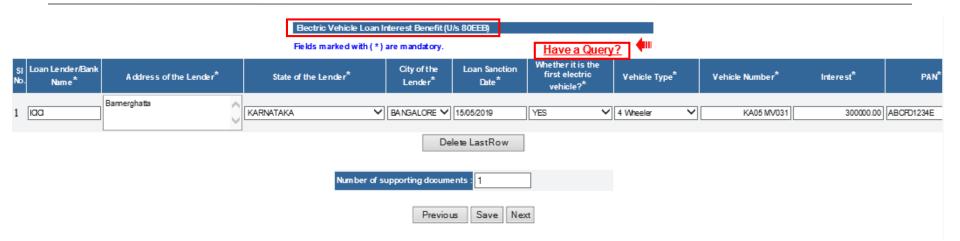


#### **Key Points:**

Benefit under this section can be claimed for Self only



# Electric Vehicle Loan Interest Benefit (U/s 80EEB)

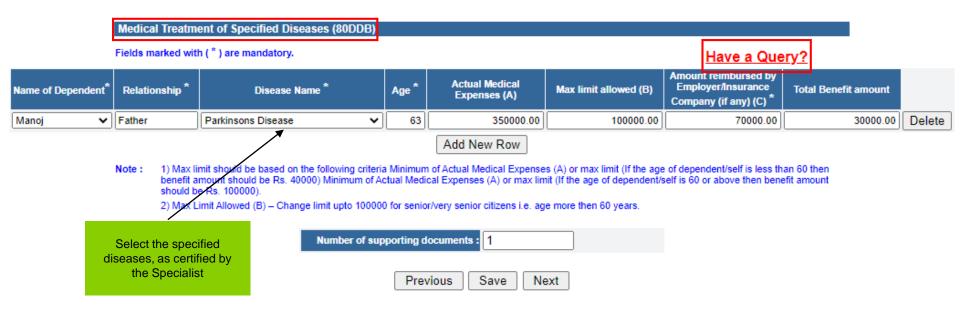


#### Note:

- The deduction is available if the assessee does not already own any electric vehicle. The assessee can only claim the tax benefit towards interest paid on the loan taken for the purchase of the first electric vehicle.
- •The loan must be taken from a financial institution or a non-banking financial company for buying an electric vehicle.
- ■The loan must be sanctioned anytime during the period starting from 1 April 2019 till 31 March 2023.
- •"Electric vehicle" has been defined to mean a vehicle which is powered exclusively by an electric motor whose traction energy is supplied exclusively by traction battery installed in the vehicle and has such electric regenerative braking system, which during braking provides for the conversion of vehicle kinetic energy into electrical energy.
- A deduction for interest payment up to INR 1,50,000/-



# Medical Treatment for Specific Disease (U/s 80DDB)

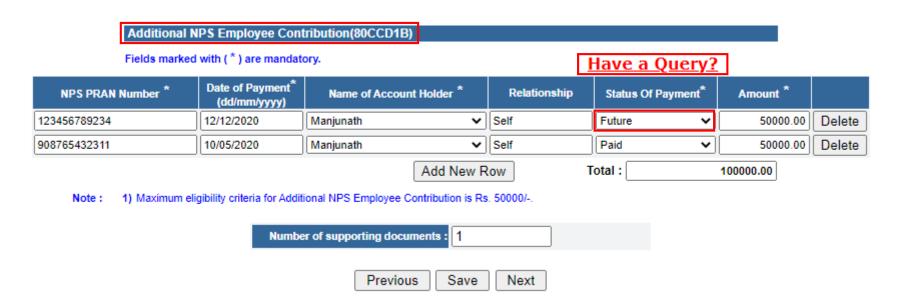


#### Note:

- •The prescription containing the name and age of the patient, name of the disease or ailment along with the name, address, registration number and the qualification of the specialist issuing the prescription is sufficient along with original medical expenditure bills to claim 80DDB benefit.
- •Deduction under this section shall be reduced by the amount received, if any, under an insurance from an insurer, or reimbursed by an employer.



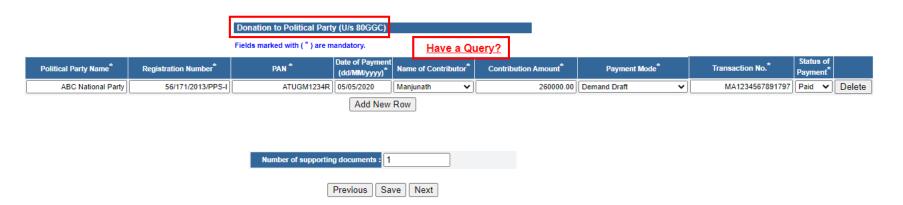
# Additional National Pension Scheme Contribution (80CCD1B)



- Benefit under this section can be claimed for Self only.
- •Have an option of selecting Future Payment if the payment is due post IPSF cut off date



# Donation to Political Party (U/s 80GGC)



#### Note:

- In order to claim deduction under section 80GGC, the individual is required to make donations / contributions only to a political party or an electoral trust.
- It should be noted here that, the political party referred above covers only a political party which is registered under Section 29A of the Representation of the People Act, 1951. Any donation / contribution to any other political party would not qualify as a deduction under section 80GGC.
- The deduction cannot be claimed by local authorities and every artificial juridical person which is either wholly or partly funded by the Government.



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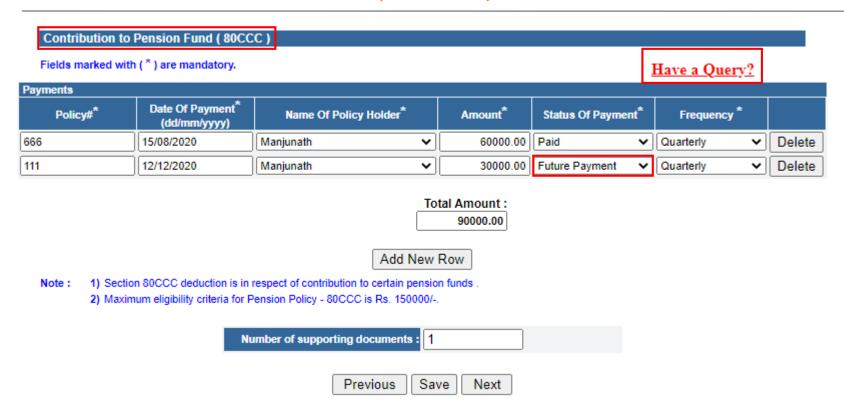
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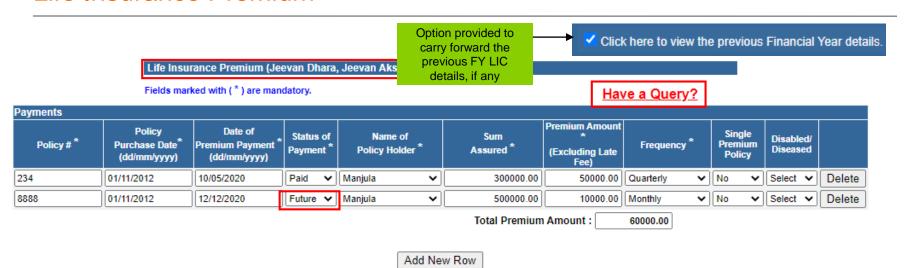
# Contribution to Pension Fund (80CCC)

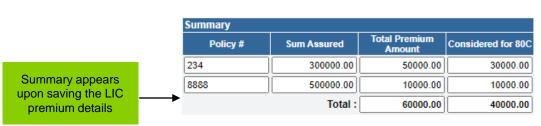


- Benefit under this section can be claimed for Self only
- Policy should specify that the benefit is eligible u/s 80CCC (Pension)
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date



## Life Insurance Premium





Note: 1) Late Payment Fee will not qualify for deduction under section 80C.

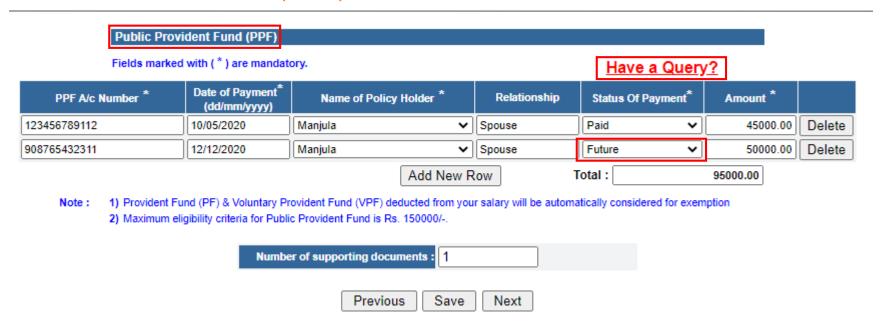
2) Tax benefit on LIC premium payment will be restricted to a max of 10% or 20% of sum assured based on the policy purchase date:

- · 20% of the sum assured for policy purchased before 1st April 2012
- 10% of the sum assured for policy purchased after 1st April 2012
- 15% of the sum assured for policy purchased after 1st April 2013 and Policy Holder either Disabled or Diseased

- 3) Maximum eligibility criteria for Life Insurance Premium is Rs. 150000/-.
- Option has been provided to carry forward the previous FY LIC details, (if any). Only the master info like Policy No., Policy Purchase Date, Name of Policy Holder, Sum Assured, Frequency, Single Premium Policy, Disabled/Diseased will be carry forwarded, if the details were updated during the previous FY. You can also update the LIC details for the current FY with out selecting the option to carry forward.



# Public Provident Fund (PPF)

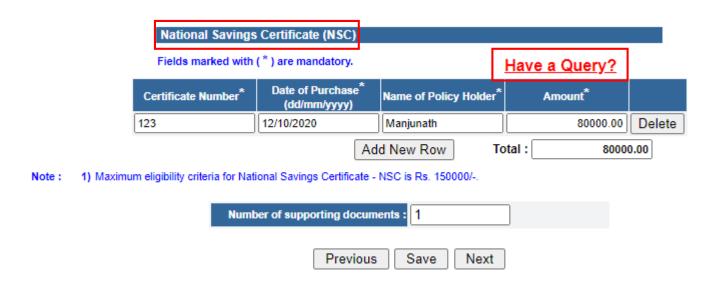


## **Key Points:**

■ PPF can be in the name of Self, Spouse, & Children



# National Savings Certificate (NSC)

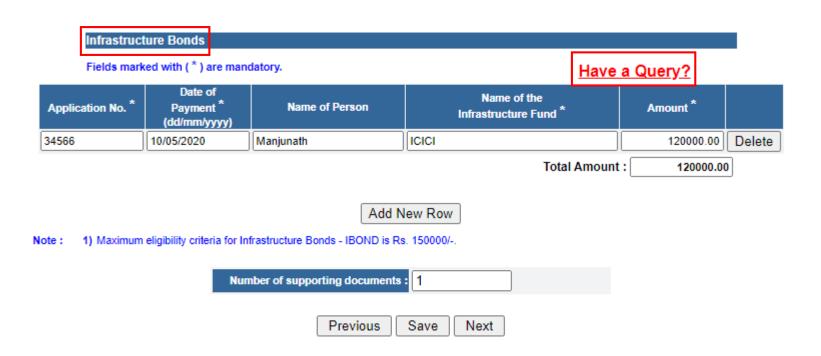


#### **Key Points:**

■ NSC must be in the name of Self only

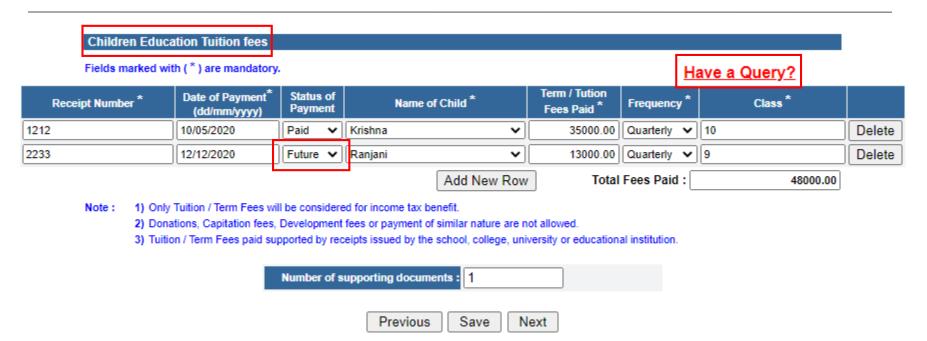


# Infrastructure Bonds





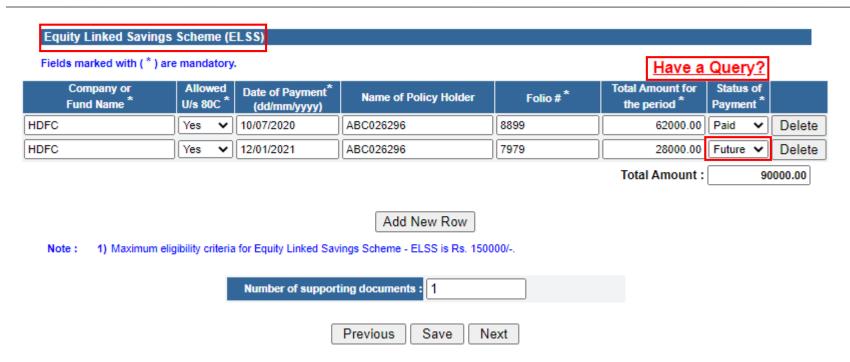
## Children Education Tuition fees



- Benefit can be claimed on 'Tuition / Term Fees' only.
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.



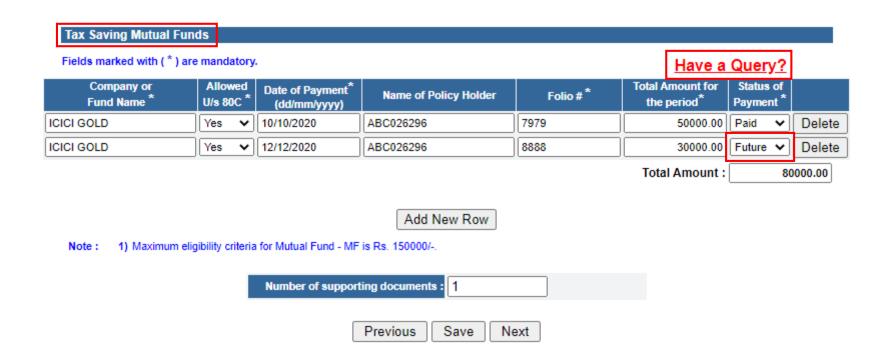
# **Equity Linked Savings Scheme (ELSS)**



- Benefit can be claimed for Self only.
- Policy should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.



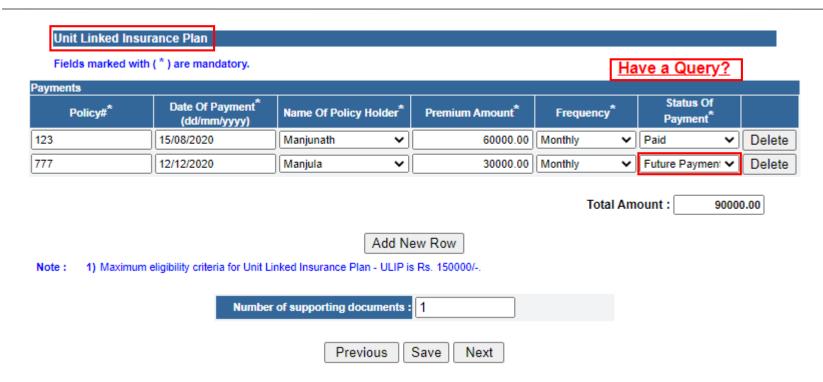
## **Mutual Funds**



- Benefit can be claimed for Self only.
- Statement should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.



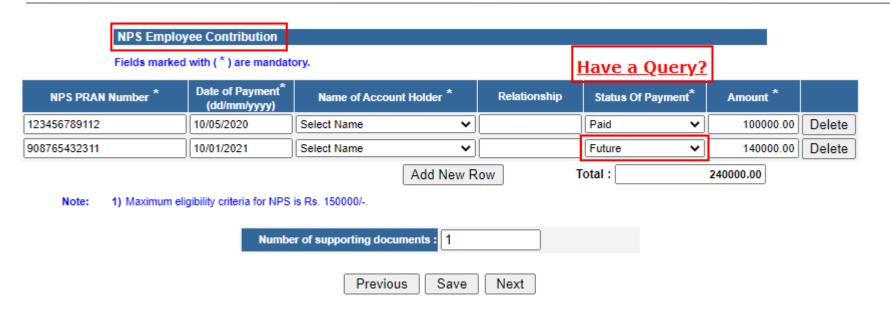
# Unit Linked Insurance Plan



- Benefit can be claimed for Self, Spouse, & Children
- Policy should specify that the benefit is eligible u/s 80C
- Have an option of selecting Future Payment if the payment is due post IPSF cut off date.



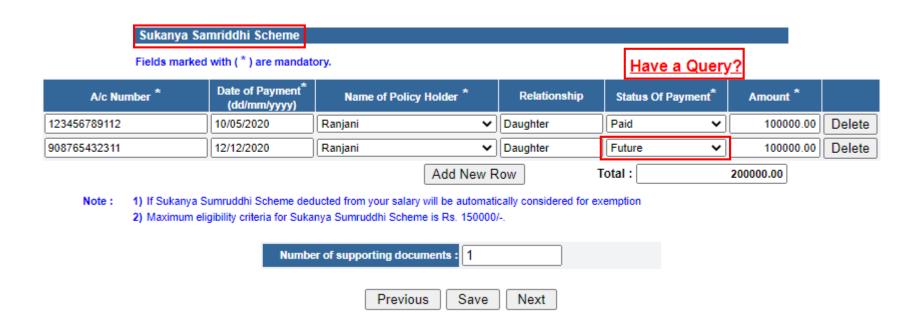
# National Pension Scheme (NPS)



- Benefit under this section can be claimed for Self only.
- •Have an option of selecting Future Payment if the payment is due post IPSF cut off date



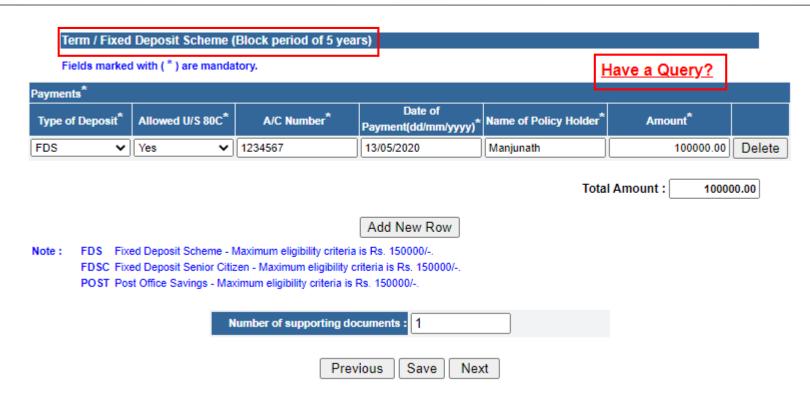
# Sukanya Samriddhi Scheme



- Benefit can be claimed for Daughter only.
- •Have an option of selecting Future Payment if the payment is due post IPSF cut off date



# Term/Fixed Deposit Scheme (Block Period of 5 years)



- Benefit can be claimed for Self only.
- Term deposits should be for a minimum period of 5 years



# NSC Interest (also considered as Other Income)

NSC Interest (Will also be considered as Other Income)

Fields marked with (\*) are mandatory.

Have a Query?

Certificate Number *	Date of Purchase <sup>*</sup> (dd/mm/yyyy)	Name of Policy Holder *	Amount *	Interest Earned *	Deduction under Section 80C *	
111	30/03/2016	Manjunath	10000.00	1211.00	0.00	Delete
222	01/08/2016	Manjunath	10000.00	1023.00	1023.00	Delete
333	01/02/2017	Manjunath	10000.00	1008.00	1008.00	Delete
444	30/05/2017	Manjunath	10000.00	920.00	920.00	Delete
555	30/11/2017	Manjunath	10000.00	906.00	906.00	Delete
666	31/01/2018	Manjunath	10000.00	880.00	880.00	Delete
777	01/06/2018	Manjunath	10000.00	818.00	818.00	Delete
888	01/01/2019	Manjunath	10000.00	864.00	864.00	Delete
999	01/05/2019	Manjunath	10000.00	800.00	800.00	Delete
1010	31/01/2020	Manjunath	10000.00	790.00	790.00	Delete

A LINE D	Total Interest:	Total Deduction
Add New Row	9220.00	8009.0

Note: 1) The total interest would be considered as part of other income for income tax calculation.

2) Maximum deduction allowed on interest on NSC u/s 80C is Rs.150000/-

Number of supporting documents :	1	

## **Key Points:**

Benefit can be claimed for Self only.

Previous	Save	Next
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■NSC certificate should have been taken on or after April 01, 2015



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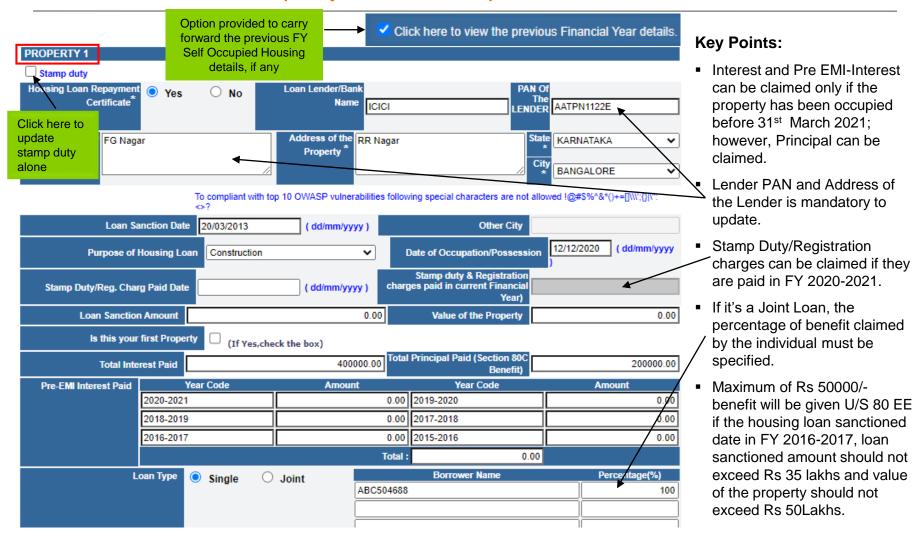
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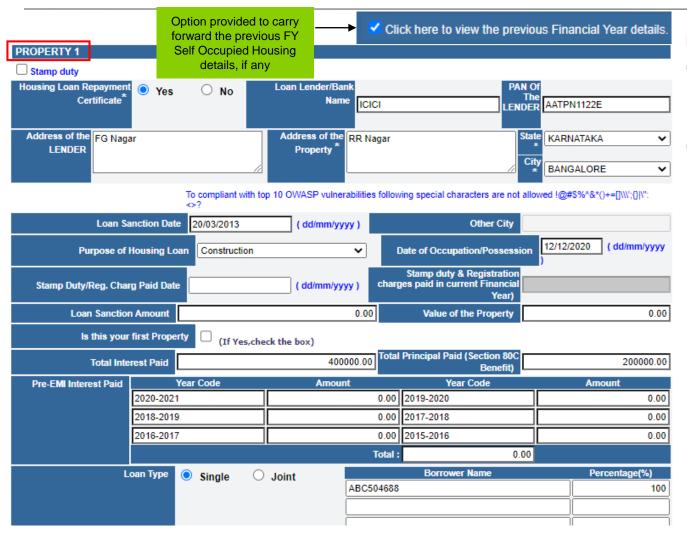
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## Loss from House Property – Self Occupied



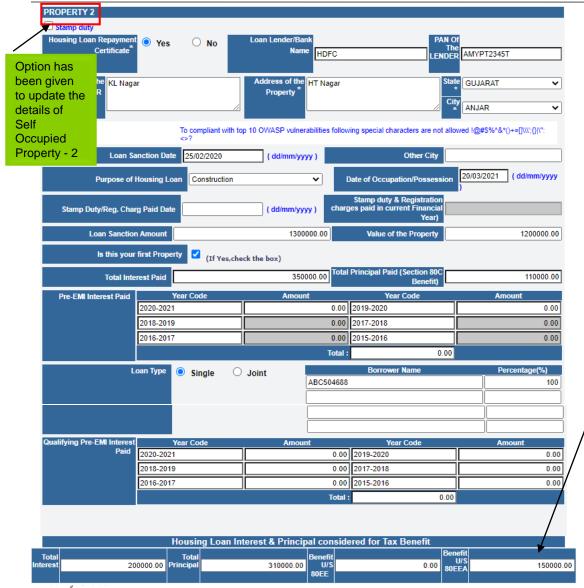
## Loss from House Property – Self Occupied (Continued..)



- Option has been provided to carry forward the previous FY Self Occupied Housing Loan details, (if any).
- Only the master info like Lender Name, PAN & Address of the Lender, Address of the Property, State, City, Other City, Loan Sanction Date, Purpose of Housing Loan, Date of Occupation/Possession, Loan Sanction Amount, Value of the Property, Loan Type, Borrower Name with Percentage will be carry forwarded, if the details were updated during the previous FY. You can also update the Housing Loan details for the current FY without selecting the option to carry forward.



## Loss from House Property – Self Occupied (Continued..)

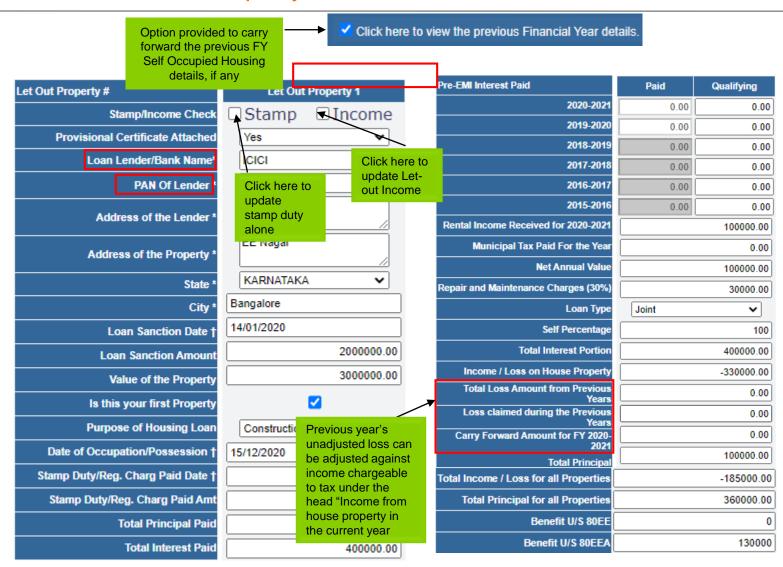


- No tax on notional rent of second self-occupied house i.e., up to two self-occupied house properties can be considered for benefit while calculating the income from house property from the FY 2019-20.
- An assessee can claim that he has two selfoccupied house properties and hence deduction with respect to interest on borrowed capital for self occupied house property can be claimed with respect to both the houses. However, there is no change in the aggregate limit for the deduction on account of interest which remains the same, i.e. Rs. 2,00,000.
- The Finance (No. 2) Act, 2019 has inserted a new Section 80EEA under the Income Tax Act for those individuals who are not eligible to claim deduction under Section 80EE. An individual can claim deduction up to Rs. 150,000 under section 80EEA subject to following conditions:
  - (a) Loan should be sanctioned by the financial institution during the period beginning on 01-04-2019 and ending on the 31-03-2021;
  - (b) Value of residential house property should not exceed Rs. 45 lakhs;
  - (c) The assessee should not own any residential house property on the date of sanction of loan; and
  - (d) The assessee should not be eligible to claim deduction under Section 80EE.



Proprietary & Confidential

## Loss from House Property – Let Out





## Loss from House Property – Let Out (Continued..)

- Interest and Pre-EMI Interest can be claimed only if the property has been occupied before 31<sup>st</sup> March 2021; however, Principal can be claimed.
- Lender PAN and Address of the Lender is mandatory to update.
- If it's a Joint Loan, the percentage of benefit claimed by the individual must be specified
- Stamp Duty/Registration charges can be claimed if they are paid in FY 2020-2021
- Rental income/notional income is mandatory to claim tax benefit under this section
- Option has been provided to carry forward the previous FY Self Occupied Housing Loan details, (if any).
- Only the master info like Lender Name, PAN & Address of the Lender, Address of the Property, State, City, Other City, Loan Sanction Date, Purpose of Housing Loan, Date of Occupation/Possession, Loan Sanction Amount, Value of the Property, Loan Type, Borrower Name with Percentage will be carry forwarded, if the details were updated during the previous FY. You can also update the Housing Loan details for the current FY without selecting the option to carry forward.



## Housing Loan Tax Deduction Benefits under New Tax Regime

### Key Points related to Housing Loan tax deduction benefits under New Tax Regime:

- In case of New Tax Regime, no tax benefit will be provided for Principal, Stamp Duty, and Registration Charges under Sec 80C for both Self Occupied and Let Out Properties.
- In case of New Tax Regime, Loss from Self Occupied Property will not be considered for tax benefit. Loss from Self Occupied Property can be used for intra-head sett-of only incase of income from Let Out Property. However, loss from both Self Occupied and Let Out Properties cannot be set-off with the other head of Income.
- Intra head set-off of loss Intra head adjustment will happen first, then inter head, not the other way around. Hence, loss from self occupied house property shall be set off against income from house property first, then if any loss remains after the set off, it shall be set off against other heads of income. Let's try to understand this with an example:
- 1st case Self Occupied Property having home loan, interest Rs 3,00,000. Let Out Property Income after 24(a) Rs 2,10,000. Salary Income Rs 10,00,000
- Loss on account of Self Occupied Property allowable Rs 2,00,000. Set this off with Income of Rs 2,10,000. The net result of this will be Income from house property Rs 10,000. Which will lead to income addition of Rs 10,000. So the GTI shall be Rs 10,10,000
- 2nd case Self Occupied Property having home loan, interest Rs 3,00,000. Let Out Property Income after 24(a) Rs 84,000 Salary Income Rs 10,00,000
- Loss on account of Self Occupied Property allowable Rs 2,00,000. Set this off with Income of Rs 84,000. The net result of this will be loss from house property Rs 1,16,000. Which will lead to loss adjustment of Rs 1,16,000. So the GTI shall be Rs 8,84,000.



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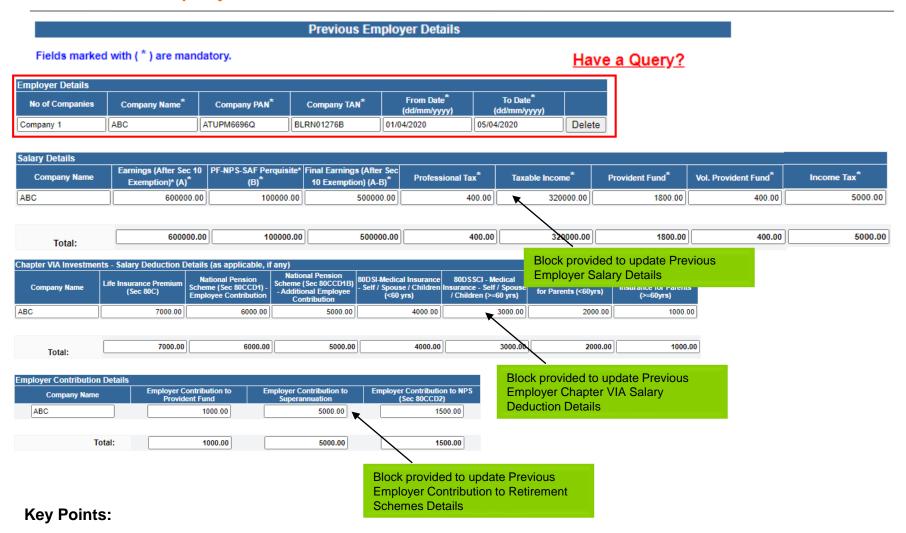
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## **Previous Employer Details**



■ The information must pertain from 1st April 2020 to the Date of Leaving with the previous employer.



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Section G Other Income

**IPSF Confirmation** 

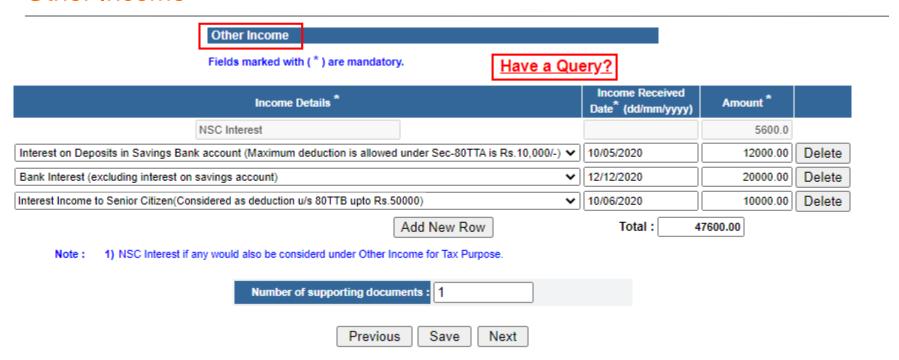
**Bar-coded IPSF Report** 

Forms & Annexures

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### Other Income



- NSC Interest will automatically be considered as Other Income.
- Maximum deduction is allowed under Sec-80TTA is INR 10,000. Section 80TTB will allow a deduction up to INR 50,000 in respect of interest income from deposits held by Senior Citizen employee. However, no deduction under Section 80TTA shall be allowed in these cases.
- •Interest from savings account or interest income from deposits declared will also be accounted as "Other Income".



## **Content Tracker**

### Locating the IPSF 2020-2021 Link

Tax Regime wise Section(s) & Item(s) Selection & Master Information

### **Section wise Data Entry**

Section A HRA

Section B Chapter VI A - Deductions from Total Income

Section C Chapter VIA - Section 80C

Section D Housing Loan (Interest & Principal)

Section E Previous Employer Details

Section G Other Income

### **IPSF Confirmation**

**Bar-coded IPSF Report** 

Forms & Annexures

Scan Image Upload



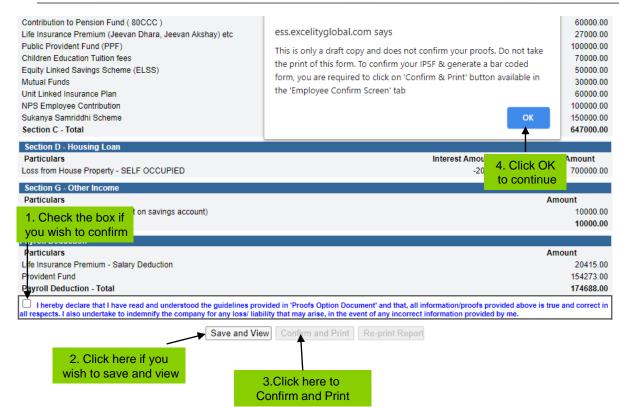
## **IPSF Confirmation Screen**

IPSE Co.	nfirmation Screen					
	d details for claiming H	IRA exemption				
From Date	To Date	Rent per Month	Rent per Year	Location	Metro Flag	Property ID
01/04/2020	31/08/2020	15000.00	75000.00 B	ANGALORE	N	1
01/09/2020	31/01/2021	22000.00	110000.00 B	ANGALORE	N	2
01/02/2021	31/03/2021	30000.00	60000.00	KANNUR	N	3
ection B - Chapter	VI A - Deductions from	Total Income				
articulars						Amount
edical Insurance (SE	C80D)					46000.0
edical Treatment/Ha	ndicapped Dependent (L	J/s 80DD)				125000.0
terest on Educationa	al Loan (U/s 80E)					200000.0
ermanent Physical D	isability (80U)					125000.0
•	Specified Diseases (80D	DB)				30000.0
	vee Contribution(80CCD	*				100000.0
	nterest Benefit (U/s 80E	*				2500000.0
onation to Political P		LD)				260000.0
		A (I.U- COTTA)				
eduction for interest ection B - Total	on Deposits in Savings A	ACCOUNT (U/S 801 TA)				8000.0 3394000.0
ction C - Chapter	VIA - Section BOC					
articulars		THE ADMINISTRATION OF THE PARTY				Amount
e Insurance Premiu	m (Jeevan Dhara, Jeeva	n Akshay) etc.				40000
blic Provident Fund	(PPF)					95000 (
tional Savings Cert						80000
rastructure Bonds						120000
idren Education Tu	tion face					48000
uity Linked Savings						90000
Saving Mutual Fur						50000
Company of the Control of the Contro						
it Linked Insurance						90000
'S Employee Contri						240000
kanya Samriddhi Si						200000
	(Block Period of 5 yrs)					100000
	be considered as Other	r Income)				8009.0
ection C - Total						1191009.
ection D - Housing	Loan			1/2/4504	PROTEIN ST	I PARTY STATE OF THE PARTY OF T
articulars				Interest	Amount	Principal Amount
	erty - SELF OCCUPIED				0.00	6766.0
ss from House Prop	erty - LETOUT				-536000.00	1620000
ection G - Other In	come					
articulars						Amount
	ng interest on savings a	ccount)				20000
ank Interest (excludi ividend						3000
vidend	Savings Bank account	(Maximum deduction is a	flowed under Sec-80TTA is Rs.1	0,000(-)		3000 8000

All your inputs get consolidated into one



## **IPSF Confirmation Process**



### **Key Points:**

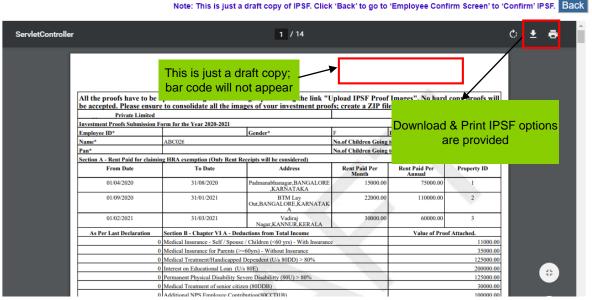
- Confirm gets enabled only after the box is checked (Step 2).
- If any of the sections are selected in Section Page but no details are updated / submitted, then IPSF can not be confirmed.
- Once confirmed, the IPSF screens are non editable.
- The IPSF Report gets generated only after confirming the IPSF (Step 4).
- Save and View Option does not confirm the IPSF, hence, screens are editable.

#### Note:

If you want to select additional Investment categories in any of the sections, go back to the "IPSF 2020-2021" link on the home page under the Year End tab or click on 'Section Page' on 'Employee Options' tab. This must be done before confirming the IPSF.



## 'Save & View' in PDF format



- This is just a draft copy of IPSF. Hence, bar code will not get generated.
- Please go back to 'Employee Confirm Screen' to 'Confirm' IPSF.
- This is the new feature that has been provided. Now the IPSF 'Save & View' and IPSF Confirmed Bar Coded sheet along with annexures will be available in PDF format which can be downloaded / printed.



## Content Tracker

### Locating the IPSF 2020-2021 Link

## Tax Regime wise Section(s) & Item(s) Selection & Master Information

### **Section wise Data Entry**

Section A HRA

Section B Chapter VI A - Deductions from Total Income

Section C Chapter VIA - Section 80C

Section D Housing Loan (Interest & Principal)

Section E Previous Employer Details

Section G Other Income

**IPSF** Confirmation

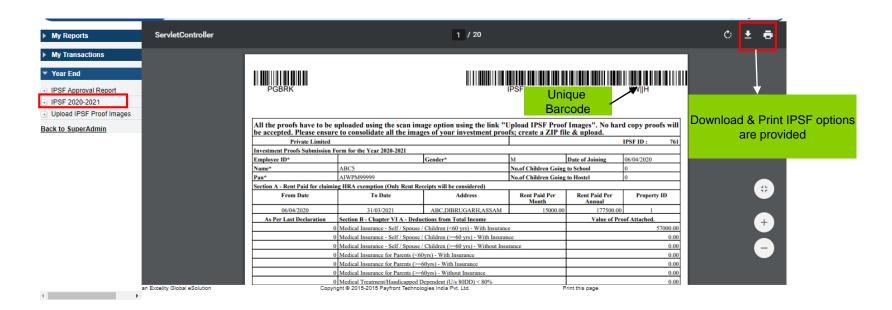
## **Bar-coded IPSF Report**

Forms & Annexures

Scan Image Upload



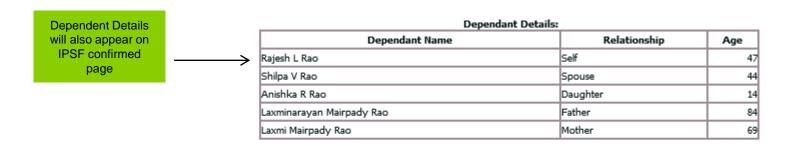
## Downloadable and Printable IPSF in PDF



- The Printable IPSF has a unique Barcode that identifies every individual, hence, print or download the IPSF along with the Barcode.
- Do not staple/scratch/write on the Barcode.
- Proofs submitted without the online IPSF (as covering) will not be accepted.

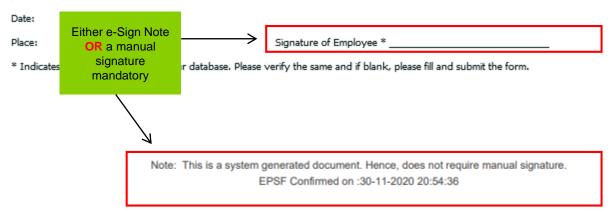


## Printable IPSF Contd...



#### Declaration:

- I hereby declare that I have read and understood the guidelines provided in 'Proofs Option Document' and that, all information, documents provided above is true and correct in all respects.
- LTA exemption claimed by me(if applicable) is as per IT rule which specifies that exemption can be claimed twice in a block of 4 years. (irrespective of the number of employers in the block period)
- 3. I also undertake to indemnify the company for any loss/ liability that may arise, in the event of any incorrect information ,documents provided by me.





## **Content Tracker**

### Locating the IPSF 2020-2021 Link

## Tax Regime wise Section(s) & Item(s) Selection & Master Information

### **Section wise Data Entry**

Section A HRA

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Section C Chapter VIA - Section 80C

Section D Housing Loan (Interest & Principal)

Section E Previous Employer Details

Section G Other Income

**IPSF** Confirmation

Bar-coded IPSF Report

### **Forms & Annexures**

Scan Image Upload



## Computation of Income/ Loss from House Property - Let Out

COMPUTATION	OF INCOM	ME / LOSS	<b>FROM HOU</b>	SE PROPE	RTY - LETO	DUT			
Name and Address of the Employee		ABC							
Permanent Account Number	AIWPM99999								
House Property U/s 24			Amo	ount					
	Proper	ty 1	Propo	erty 2	Propo	erty 3			
(a) Housing Interest paid for 2020-2021 as per certificate		400000		290000		300000			
(b) Rental Income / Notional rental income for the year 2020- 2021	100000		50000		1000000				
(c) Less: Municipal Tax Paid to the authorities	0		0		0				
(d) Net Income from House Property (b - c)	100000		50000		1000000				
(e) Less: Repairs and Renewals @30% on Net Income (d * 30%)	30000		15000		300000				
(f) Net Actual Income to be set off (d - e)		70000		35000		700000			
(g) Net value of Loss / Income for the year (a - f)	(330000.0)		(255000.0)		400000				
(h) Total Loss Amount from Previous Years		0		0		100000			
(i) Loss claimed during the Previous Years		0		0		90000			
(j) Carry Forward Amount for 2020-2021		0		0		10000			
(k) Final Net value of Loss / Income for the year 2020-2021 (g- j) - after adjusting Previous Year Carried Forward Loss Amount, if any (applicable and adjusted only in case of Income from Let Out Property for the year 2020-2021)						(185000.0)			
Note: If the Net Value exceeds into	erest paid for the	year, then it wo	uld be treated as	Income from Ho	use Property				
Place:									
Date:					Signatu	re of Employee *			



## Form for sending Particulars of income under section 192(2B)

Form for sending Particulars of income under section 192(2B) for the year ending 31/03/2021

#### [See Rule 26B]

1. Name and address of the employee ABC

2. Permanent Account No. AIWPM99999

3. Residential status: ROR

4. Particulars of income under any head of income other than "salaries" (not being a loss under any such head other than the loss under the head "Income from house property") received in the financial year - 2020-2021

(i) Income from house property (in case of loss, enclose computation 0.0 thereof)

(ii) Profit and gain of business or profession 0.0

(iii) Capital Gains 0.0
(iv) Income from other sources 0.0

(iv) Income from other sources 0.0
(a) Bank Interest (excluding interest on savings account) 20000.0

(b) Bank Interest (excluding interest on savings account) 10000.0 (c) Interest on Deposits in Savings Bank account (Maximum 12000.0 deduction is allowed under Sec-80TTA is Rs.10.000/-)

(d) NSC Interest (Other Income) 5600.00

5. Aggregate of sub-items (i) to (iv) of item 4 Total Rs. 47600.00

#### Verification

I ABC504688, do hereby declare that what is stated above is true to the best of my knowledge and belief.

Verified today, the day of.

Place:

Signature of the employee



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

#### DECLARATION FOR PREMIUMS FALLING DUE AFTER PROOF CUT OFF DATE OF 31-12-2020

Employee ID: 50 Employee Name: ABC:

Given below are the details of premiums that are due for payment after the proof cut off date, but are payable before the financial year-end 2020-2021. Please consider these premiums payable for the tax benefit in the current financial year 2020-2021.

		Life Insurance Premium (Jeevan Dhara, Jeevan Akshay) etc									
	Policy #	Expected Date of Payment	Name of Policy Holder	Sum Assured	Premium Amount(Excluding Late Fee)	Frequency					
	8888	12/12/2020	ABC504688	200000	33000.00	M					
I					Total	33000.00					

Medical Insurance Premium								
Policy#	Expected Date of Payment	Name of Policy Holder	Amount					
777	12/12/2020	ABC504688	32000.00					
		Total	32000.00					

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

#### Employee Declaration

I here by declare that the information provided above is true and correct and will be solely responsible for any situation arising out of non-payment of the above premiums before 31/03/2021

Signature of the Employee :

Date:



## Self-declaration for claiming Sec 80GGC deduction

#### Self-declaration for claiming Sec 80GGC deduction

This is to declare that, I ABC, have contributed to the following Political Party/Parties during the Financial Year 2020-2021.

The amount was paid through a different payment mode other than 'Cash' or 'Kind'.

Political Party Name	Political Party Registration Number	PAN of Political Party	Date of Payment	Contribution Amount	Payment Mode	Transaction No.
Manvadhikar National Party	29AABCU9603R1ZJ	ATUGM1234R	12/10/2020	260000	Debit Card	1234567891

The Political Party/Parties referred in the above list is/are the Party/Parties which is/are registered under Section 29A of the Representation of the People Act, 1951.

These are not the local authorities and not an artificial juridical person which is/are either wholly or partly funded by the Government.

I here by declare that, the information provided above is true and correct and will be solely responsible for any situation arising out of false information.

Signature of the	Employee:	

#### Note:

- (i) In order to claim deduction under section 80GGC, the individual is required to make donations / contributions only to a political party or an electoral trust.
- (ii) It should be noted here that, the political party referred above covers only a political party which is registered under Section 29A of the Representation of the People Act, 1951. Any donation / contribution to any other political party would not qualify as a deduction under section 80GGC.
- (iii) The deduction cannot be claimed by local authorities and every artificial juridical person which is either wholly or partly funded by the Government.



## Self-declaration for Previous Employer's Payroll Deductions

#### This is to declare that, I ABC had invested in the following Chapter VIA investments which were part of Previous Employer's payroll deductions for the Financial Year 2020-2021. The amount was paid by me as part of monthly salary deductions. Chapter VIA Investments - Previous Employer Salary Deduction Details (as applicable, if any) 80DPI-Medical 80DPSCI-Medical Company Name Life Insurance National Pension National Pension 80DSI-Medical 80DSSCI - Medical Premium (Sec 80C) Scheme (Sec Scheme (Sec Insurance - Self / Insurance - Self / Insurance for Insurance for Spouse / Children Spouse / Children 80CCD1) -80CCD1B) -Parents (<60vrs) Parents (>=60vrs) Employee Additional (<60 yrs) (>=60 yrs) Contribution Employee Contribution ABC 7000.00 2000.00 6000.00 5000.00 4000.00 3000.00 1000.00 This declaration is being submitted in the absence of submission of specific proof (except the Full & Final Income Tax Computation Sheet & Form 12B) towards the abovementioned investment details.

Self-declaration given for claiming tax benefit for Previous Employer's Payroll Deductions

Employee Name : ABC

Employee PAN: AIWPM99999 Employee PRAN: 110131904032

Date: .....

#### Notes:

- This declaration to be submitted mandatorily only in case of non-submission of specific proof (except the Full & Final Income Tax Computation Sheet & Form 12B)
  related to Previous Employer's deduction towards LIC, Medical Insurance, National Pension Scheme (Employee Contribution).
- 2. The amount so declared as part of IPSF will be considered for tax benefit under Chapter VIA for overall tax calculation for the Financial Year.

I hereby declare that, the information provided above is true and correct and will be solely responsible for any situation arising out of false information.



Signature of the Employee: .....

## Self-declaration for Previous Employer Contribution to Retirement Schemes

#### Self-declaration given towards Previous Employer Contribution to Retirement Fund or Schemes

This is to declare that, following are the details of Previous Employer/s Contribution towards Recognized Provident Fund, Approved Superannuation Fund, and National Pension Scheme for the Financial Year 2020-2021.

Previous Employer Contributions towards retirement schemes:

	Employer Contribution to Provident Fund		Employer Contribution to National Pension Scheme (Sec 80CCD2)
ABC	1000.00	5000.00	1500.00

This declaration is being submitted in the absence of submission of specific proof (except the Full & Final Income Tax Computation Sheet & Form 12B) towards the above-mentioned Previous Employer's contribution details.

I hereby declare that, the information provided above is true and correct and will be solely responsible for any situation arising out of false information.

The second	
Date:	

Signature of the Employee: .....

Employee Name: ABC

Employee PAN: AIWPM99999 Employee PRAN: 110131904032

#### Notes:

- This declaration to be submitted mandatorily only in case of non-submission of specific proof (except the Full & Final Income Tax Computation Sheet & Form 12B)
  related to Previous Employer's Contribution towards Recognized Provident Fund, Approved Superannuation Fund, National Pension Scheme.
- 2. The contribution mentioned in the declaration is Employer contribution and not the Employee contribution.
- Any Employer/s contribution (including Previous Employer/s and Current Employer) to these retirement schemes exceeding a combined cap of INR 7,50,000 for the Financial Year will be taxed as perquisite in the hands of an employee.
- 4. Any annual accretion by way of interest, dividend, or any other amount of similar nature during the Financial Year to the balance at the credit of these funds or schemes will be treated as perquisite to the extent it relates to the employer's contribution which will be included in total taxable income.



## Previous Employer Details - Form 12 B

#### FORM NO. 12B

[See Rule 26A]

Form for furnishing details of income under section 192(2) for the year ending 31/03/20

Name and address of the employee: ABC
Permanent Account No.: AIWPM99999
Residential status:

Serial Number	address of Employer(s)	Employer(s) as allotted by the ITO	Permanent Account Number of the Employer(s)	t	Total amount of salary excluding amounts required to be shown in Col. 7 and Col. 8	house rent allowance,co nveyance allowance and other allowances to the extent	and amount of accretion to employee's Provident Fund Account (give details in the annexure)		respect of life	amount of tax deducted during the year(enclose certificate issued under	Remarks
1	2	3	4	5	6	7	8	9	10	11	12
1	ABC	BLRN01276 B	ATUPM669 6Q	5 days	-	-	-	500000	2200	5000	Professional Tax Rs. 400

Signature of the Employe	e

#### Verification

I ABC504688 ,do hereby declare that what is stated above is true to the best of my knowledge and belief.

Verified today, the day of.

Place:

Excelity

Proprietary α Connuerman



## Annexure

#### ANNEXURE

[See column 8 of Form No. 12B]

Particulars of value of perquisites and amount of accretion to employee's provident fund account

Name and address of the employee: ABC Permanent Account No.:AIWPM99999

Period Year ending:31/03/2021

Name of Employee	TAN/PAN of the Employer	Where accommodation is unfurnished	Value as if accommodation is unfurnished	Cost of furniture (including television sets, radio sets, refrigerators and other household appliances and air conditioning plant or equipment) OR hire charges if hired from a third party	Perquisite value of furniture (10% of column 5) OR actual hire charges payable	Total of columns 4 and 6	Rent, if any paid by employee	Value of Perquisite (Col. 3 minus Col. 8) or (Col. 7 minus Col. 8) as applicable
1	2	3	4	5	6	7	8	9



## ANNEXURE

Whether any conveyance has been provided by the employer for eo or at a concessional rate or where the employee is  Remuneration paid by employer for domestic and/or personal services provided to the employee (give details)  Value of free or concessional passages on home leave and other travelling to the employer, free of cost or at concessional rate or where the employee is  Estimated value of any other benefit or amenity provided by the employer, free of cost or at concessional rate or other travelling to the employer (give details) [See rule]  Estimated value of any other benefit or amenity provided by the employer, free of cost or at concessional rate or other benefit or amenity provided by the employer (give details) [See rule]  Interest credited to the assessee's account in recognized provident fund in excess of the of the employee's salary [See Schedule IV]	Total of columns 9 to 15 carried to column 8 of Form No. 12B
allowed the use of one or more motor cars owned or hired by the employer, estimated value of perquisite (give details) [See Rule 3 (c)]  2B read with section 10(5)(ii)]  2B read with section (give details), e.g. supply of gas, electricity or; estimated value of water for household perquisite (give details) consumption, free; [See rule 3 (c)] educational facilities,; transport for families, etc.; [See rules 3 (d), 3(e) and 3(f)]	
10 11 12 13 14 15	16

### **Key Points:**

■ The IPSF, Forms, Annexure, & supporting documents must have either e-Sign Note OR a manual signature mandatorily.



Self declaration given for possession of Housing property(in the absence of Possession certificate) - Self Occupied(1)
(Applicable if housing loan interest/principal deduction benefit is claimed u/s 24)
This is to declare that I ABC ,have gained the ownership/possession of my house property located at the following address, on 12/03/2021 (DD/MM/YYYY).
Address:
RR Nagar
BANGALORE
Loan Lender/Bank Name : ICICI
Loan Sanction Date: 11/07/2019
Date : Signature of the Employee:
Note: Section 24(b) of the Act allows deduction from income from house property on interest on borrowed capital as under:-  (i) The deduction is allowed only in case of house property which is owned and in the occupation of the employee for his own residence. However, if it is not actually occupied
(i) The deduction is allowed only in case of house property which is owned and in the occupation of the employee for his own residence. However, if it is not actually occupied by the employee in view of his place of the employment being at other place, his residence in that other place should not be in a building belonging to him.

(ii) The house so acquired or constructed should be completed within 3 years from the end of the FY in which the capital was borrowed. Hence it is necessary for the DDO to have the completion certificate of the house property against which deduction is claimed either from the builder or through self-declaration from the employee.



## Self declaration given for possession of Housing property (in the absence of Possession certificate) - Letout 1 (Applicable if housing loan interest/principal deduction benefit is claimed u/s 24) This is to declare that I ABC have gained the ownership/possession of my house property located at the following address, on 15/12/2020 (DD/MM/YYYY). Address: LK Nagar CHITTOR, TRIPURA Loan Lender/Bank Name: HDFC Loan Sanction Date: 10/12/2020 Date: Signature of the Employee: ..... Note: Section 24(b) of the Act allows deduction from income from house property on interest on borrowed capital as under:

- (i) The deduction is allowed only in case of house property which is owned and in the occupation of the employee for his own residence. However, if it is not actually occupied by the employee in view of his place of the employment being at other place, his residence in that other place should not be in a building belonging to him.
- (ii) The house so acquired or constructed should be completed within 3 years from the end of the FY in which the capital was borrowed. Hence it is necessary for the DDO to have the completion certificate of the house property against which deduction is claimed either from the builder or through self-declaration from the employee.



### FORM NO. 12BB

(See rule 26C)

#### Statement showing particulars of claims by an employee for d der section 192

1. Name and address of the employee

2. Permanent Account Number of the employee .99999
3. Financial year : 2020-2021

		Details of claims and evidence the		
Sl. No.	Nature of claim		Amount(Rs.)	Evidence/Particulars
(1)	(2)		(3)	(4)
	House Rent Allowance:			
	(i) Rent paid to the landlord: Rs.177500			
	(i) Property No :1			
1.	(ii) Name of the landlord :Vadi		Rs.177500	House Rent Receipts
	(iii) Address of the landlord :NM Nagar			
	(iv) Permanent Account Number of the Landle	rd :PANNOTAVBL		
	(v) Annual Rent :177500			
2.	Leave Travel Concessions or Assistance		Rs.61000	Travel Receipts/Tickets
	Deduction of Interest on Borrowing:			
	(i) Interest Payable/Paid to the Lender			
	Self Occupied Interest - Property 1	:Rs400000		
	Self Occupied Interest - Property 2	:Rs280000		
	Self Occupied Interest	:Rs200000		
	Let-Out Interest - Property 1	:Rs330000		
	Let-Out Interest - Property 2	:Rs255000		
	Let-Out Interest - Property 3	:Rs.400000		
	(ii) Name of the Lender			
	Self Occupied - Property 1	: ICICI		
	Self Occupied - Property 2	: HDFC		
	Let-Out - Property 1	: ICICI		
	Let-Out - Property 2	: SBI		



4.	(h) Housing Loan - Principal Amount paid, Registration Fees, Stamp duty  (i) NSC Interest (Will also be considered as Other Income)  (j) National Savings Certificate (NSC)  (k) Unit Linked Insurance Plan  (ii) Section 80CCC  (iii) Section 80CCD  (B) Other sections (e.g. 80E, 80G, 80TTA, etc.) under Chapter VI-A.  (a) Additional NPS Employee Contribution(80CCD1B)  (b) Medical Insurance (SEC80D)  (c) Electric Vehicle Loan Interest Benefit (U/s 80EEB)  (d) Medical Treatment of Specified Diseases (80DDB)  (e) Deduction for Interest on Deposits in Savings Account (U/s 80TTA)  (f) Donation to Political Party (U/s 80GGC)  (a) Interest on Educational Loan (U/s 80E)  (h) Permanent Physical Disability (80U)	: Rs.5600 : Rs.300000 : Rs.300000 : Rs.60000 : Rs.90,000.00 : Rs.100,000.00 : Rs.45000 : Rs.2300000 : Rs.2300000 : Rs.10000 : Rs.260000 : Rs.260000 : Rs.75000	Rs. 4668880.0	Photocopy of the investment proofs
		Verification		
	I, ABC , Son/Daughter of . do hereby certify that the information	given above is compl	lete and correct.	
	Place : Bangalore			
	Date : 30-11-2020		(Signature of the Employee)	
	Designation : Mgr Internal Audit 3		Full Name: ABC	

Note: The information/details above, as required for deduction of tax u/s 192 of the Income Tax Act, has been entered by the employee through an authorized login on the portal. The information submitted above is deemed to be e-signed by the employee.



Payroll Deduction		
Particulars	Amount	
Provident Fund	260280.00	
Payroll Deduction - Total	260280.00	

### **Key Points:**

• Any deduction through pay slip like PF, VPF and Medical Insurance etc., will be considered directly for Income Tax benefits and no need of submitting the proof for this.



## **Content Tracker**

### Locating the IPSF 2020-2021 Link

## Tax Regime wise Section(s) & Item(s) Selection & Master Information

### **Section wise Data Entry**

Section A HRA

Section B Chapter VI A - Deductions from Total Income

Section C Chapter VIA - Section 80C

Section D Housing Loan (Interest & Principal)

Section E Previous Employer Details

Section G Other Income

**IPSF** Confirmation

Bar-coded IPSF Report

Forms & Annexures

## Scan Image Upload



## Scan Image Upload

- Please download IPSF and other annexures in PDF format. The IPSF and annexures to have an e-Sign Note OR a manual signature mandatorily.
- Save all scanned images of proofs including IPSF and annexures in one folder.
- · Zip the folder.
- Name the zip file without any space example:

Correct- "EMPIDIPSF202021.zip". Incorrect- "EMPID IPSF 2020 21.zip"

- Open the zipped folder and ensure all the documents are saved /can open from the zipped folder.
- Log on the link Year End>>Upload IPSF Proof Images.
- Please go through the following slides to upload the zipped file.
- You will not be able to upload the proof images if the IPSF is not confirmed.

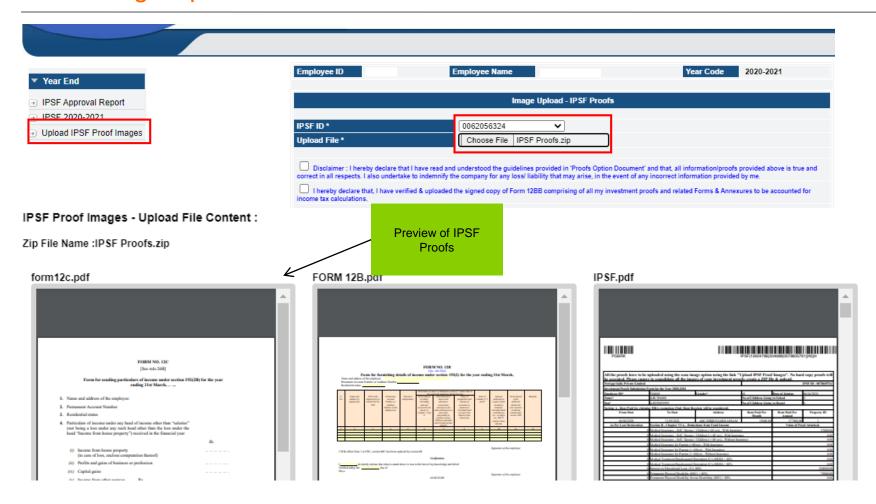




be accepted. Please ensure NetApp India Private Limited		IPSF ID:	605761			
Investment Proofs Submission F	orm for the Year 2020-2021					
Employee ID*		Gender*	M	Date of Joining	06/04/2020	
Name*	ABC504688 No.of Children Going t		g to School 0			
Pan*	AIWPM99999 No.of Children Going t			to Hostel	0	
Section A - Rent Paid for claimin	ng HRA exemption (Only Rent Re	ceipts will be considered)				
From Date	To Date	Address	Rent Paid Per Month	Rent Paid Per Annual	Propert	y ID
06/04/2020	31/03/2021	ABC,DIBRUGARH,ASSAM	15000.00	177500.00	- 1	
As Per Last Declaration	Section B - Chapter VI A - Dedu	ctions from Total Income		Value of Pro	of Attached.	
0	Medical Insurance - Self / Spouse	/ Children (<60 yrs) - With Insurance	e			57000.0
0	Medical Insurance - Self / Spouse	/ Children (>=60 yrs) - With Insuran	ce			0.0
0	Medical Insurance - Self / Spouse	/ Children (>=60 yrs) - Without Insu	rance			0.0
0	Medical Insurance for Parents (<6	Oyrs) - With Insurance				0.0
0	Medical Insurance for Parents (>=60yrs) - With Insurance					0.0
0	Medical Insurance for Parents (>=60yrs) - Without Insurance					0.0
0	Medical Treatment/Handicapped Dependent (U/s 80DD) < 80%					0.0
0	Medical Treatment/Handicapped Dependent (U/s 80DD) > 80%			0.0		0.0
0	Interest on Educational Loan (U/s 80E)			260000		260000.0
0	Permanent Physical Disability (80U) < 80%			75000.0		
	Permanent Physical Disability Severe Disability (80U) > 80%			0.0		
0	Medical Treatment of Specified D			40000.		40000.0
0	Medical Treatment of very senior					0.0
0	Medical Treatment of senior citizen (80DDB)					0.0
0	Additional Housing Loan Interest Benefit (U/s 80EE)				0.0	
15000	Additional NPS Employee Contribution(80CCD1B) 4500			45000.0		
0	Electric Vehicle Loan Interest Benefit (U/s 80EEB)			23	0.00000	
0	Additional Housing Loan Interest Benefit (U/s 80EEA)			0.0		
0				260000.0		
0				10000.0		
0	0 Deduction for Interest on Deposits in case of Senior Citizens (U/s 80TTB)			0.0		
	Section C - Chapter VIA - Section 80C					
0	Contribution to Pension Fund ( 80	CCC)				90000.00



## Scan Image Upload - Preview of Proofs



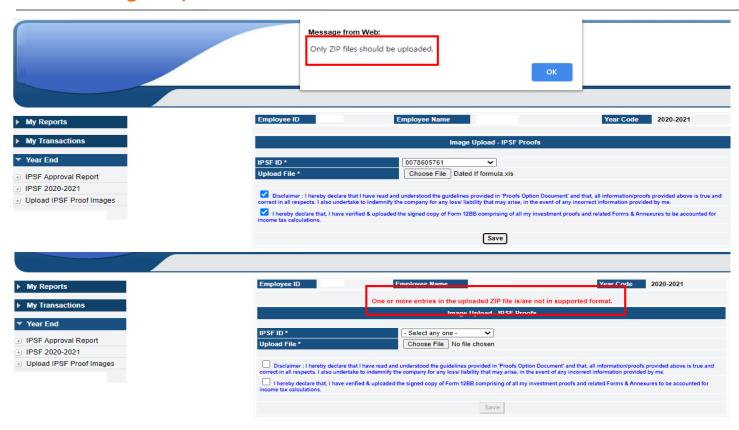
Please refer next slide for details.



## Scan Image Upload - Preview of Proofs (Continued..)

- The image upload module helps the user to upload the scanned images of the IPSF proofs online. To access this
  module navigate to Year End >> Upload IPSF Proof Images.
- Select the IPSF ID from the drop down (which is confirmed for the current year).
- When the zip folder containing the IPSF, annexures, copies of investment proofs is browsed and selected, the preview of files contained in the zip folder will be shown as thumbnails on the same screen of 'Upload IPSF Proof Images'.
- No zip file to be placed in a zip file. System will not be able to read the zip file inside another zip file. This will give an error in preview.
- All file images with the file extensions like .jpeg, .pdf, .jpg, .png, .bmp, .tif will be read and preview will be shown on the screen.
- This feature will not support for the browsers which are older versions e.g., IE8 and other older versions.
- In IE 9,10,11 only individual images will be shown as a preview. However, in case of zip file, only the individual file names will be displayed.
- This feature will work in all other browsers like MS Edge, Chrome, Mozilla, OPERA, Safari.





- Only .zip files can be uploaded. If the user attempts to upload any other file format, then the system throws an error message.
- The format of the proofs (scanned images) should be either tif, pdf, bmp, png, jpg, jpeg only. Any attempt to upload files of any other formats will result in error.





### **Key Points:**

• The upload of scan image with secured mode or with password encrypted / with null password will result in error. Convert the pdf file which is password protected into (.tif / .pdf / .jpg / .bmp) format or re-scan PDF file and upload.





- The size of the zip file containing the proofs should not exceed **20MB**. Any attempt to upload files larger than 20MB will result in error.
- Once the file is successfully uploaded, the screen will display a successful upload message.





- If the user attempts to upload a file after successful upload, then the system throws an error.
- Only one consolidated zip file (including all bar coded IPSF, annexures, proofs) can be uploaded. Once uploaded, the system will be locked. No further uploads are allowed.



	Do's and Don'ts				
SI. No.	Do's	Don'ts			
1	The files to be uploaded should be a valid .zip file	Do not upload files without zipping them			
2	The .zip file size should be less than 20MB	Do not upload a .zip file which exceeds 20MB in size			
3	Consolidate all the scanned files into a single .zip file before uploading it	Do not try to upload a corrupted file			
4	The file format of scanned files should only be any of these: .tif / .pdf/ .jpg/ .bmp	Do not upload a .zip file which consists of files with format any other than one accepted			
	All the scanned files in the .zip file should be in Black and White	Do not protect files with passwords			
6		Do not upload any document which has digital signature instead, take a printout, scan, and upload			



## **Key Messages**

- Upload ALL the proofs / annexure as applicable (as per the guidelines) to the IPSF form.
- Enclose the proofs in order of the IPSF data filled (section-wise).
- Annexure such as Form 12C, Form 12B, etc., should be aligned to the respective proofs.
- The IPSF, Forms, Annexure, & supporting documents must have either e-Sign Note OR a manual signature mandatorily.
- Form 12BB will not be generated for the New Tax Regime opted employees.
- Multiple submission of claims will not be considered.

Note: Proofs submitted beyond the cut-off date / not in line with the guidelines will not be accounted for income tax calculations



# Thank you

