



# Simplifying financial lives

India's largest tax-filing and tax-saving platform for individuals

## Introduction to ITR filing with ClearTax

ClearTax is India's largest ITR filing website used by lakhs of Indians to e-file their returns free of cost, and get guidance on planning their taxes and personal finance.

Over 5 million people use ClearTax to e-file their IT returns. We work closely with more than 10,000 CA firms, 1000+ corporates, 20+ banks and 10+ payrolls to offer our services to them and their employees.

Our services include:

- Free of cost ITR filing platform for individuals
- Personalised CA assisted service for customers with critical tax returns
- Live chat with experts for income tax related queries

## ITR filing in under 3 simple steps



***All you have to do is get your Form 16 and complete your  
tax filing for FREE in just 7 minutes***

Here's how ClearTax makes **tax filing easy for you:**



**Auto-selects your return** form based on your income



Support multiple Form 16s if **you have switched jobs in a year**

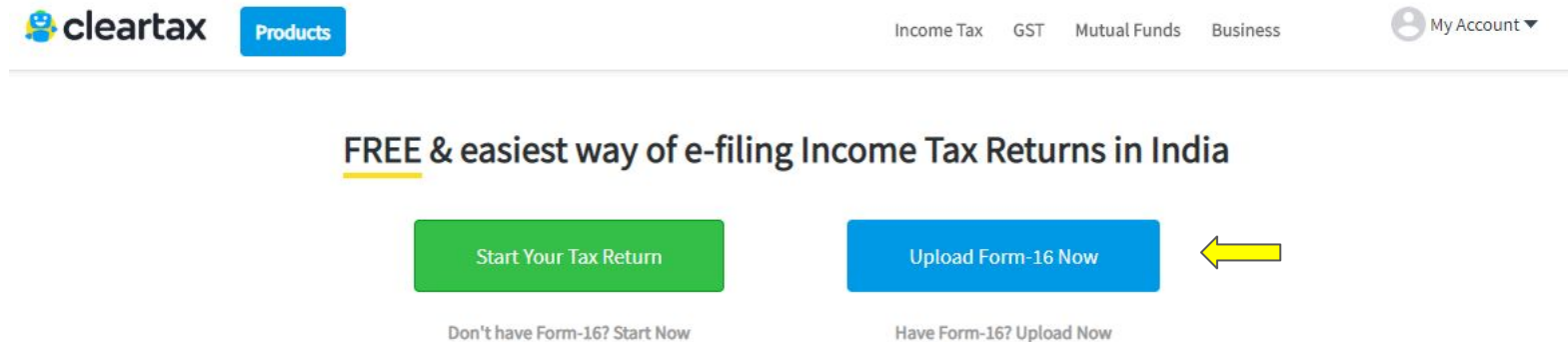


**24\*7 expert support** for our return filers

*India's largest tax and financial services platform*  
**FOR INDIVIDUALS AND BUSINESSES**

## Let's take a detailed view of the ITR filing process with ClearTax

**Step 1:** Login to your ClearTax account. Click on 'Upload Form 16 Now' if you have your Form 16 in PDF format. If you do not have Form 16 in a PDF format, click on 'Start your Tax Return'.



**Need Assistance in ITR E-filing? We are here to help**

Get an expert CA to calculate your taxes and e-file tax return on your behalf

**Step 2:** You have to upload your Form 16 in the PDF format here and edit the details if necessary later. In case you have switched jobs in between, we support multiple Form 16s upload too

## Upload your Form-16 PDF

You can review & edit details as necessary later.

### Choose your Form-16 PDF to upload

You can upload a password protected PDF too.

Drop file here or click to select

Proceed >

[Continue without Form-16](#)



#### Upload Multiple Files

- If you have multiple Form-16s you can upload them one at a time.
- If you have a Form-26AS you can also upload that here.



#### Edit values if required

If you had not reported your 80C deductions to your company, you can still edit the values after you upload the PDF and claim the deduction.

**Step 3:** In this step, we read your Form 16 thoroughly and provide a summary of your income and deductions during the financial year. Click to 'Proceed to e-filing' to file your tax return.

Awesome! We read your Form-16 successfully.

[Proceed to E-filing >](#)



OR

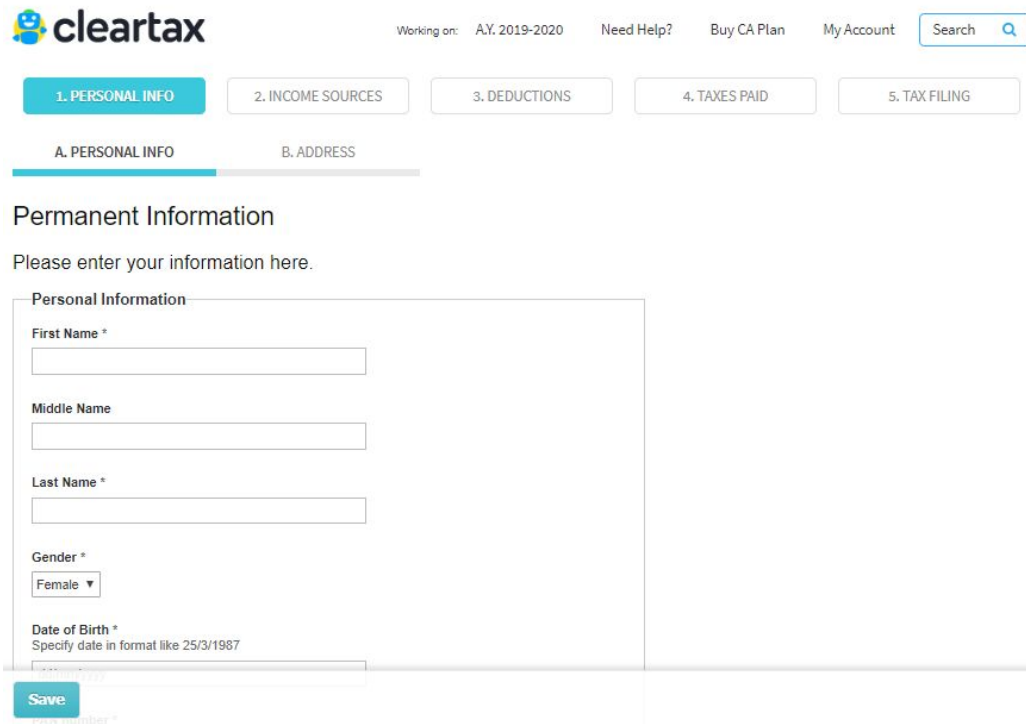
[Upload another Form-16](#)

AY 2019-20

Summary of Income, Deductions and Taxes

Taxable Income From Salary	Rs. 3,86,665
Gross Total Income	Rs. 3,86,665
Total Deductions	Rs. 17,385
Total Income	Rs. 3,69,280

**Step 4:** In this step, you need to enter your name as per PAN, PAN, date of birth and your father's name, your address and save to proceed further.



The screenshot displays the ClearTax website interface for the 'Permanent Information' step. At the top, the ClearTax logo is on the left, and navigation links for 'Working on: AY: 2019-2020', 'Need Help?', 'Buy CA Plan', 'My Account', and a 'Search' button are on the right. Below the navigation bar, a horizontal menu contains five steps: '1. PERSONAL INFO' (highlighted in blue), '2. INCOME SOURCES', '3. DEDUCTIONS', '4. TAXES PAID', and '5. TAX FILING'. Under the '1. PERSONAL INFO' step, there are two sub-sections: 'A. PERSONAL INFO' (highlighted with a blue bar) and 'B. ADDRESS'. The 'Permanent Information' heading is followed by the instruction 'Please enter your information here.' The 'Personal Information' form includes fields for 'First Name \*', 'Middle Name', and 'Last Name \*', each with a text input box. Below these is a 'Gender \*' dropdown menu currently set to 'Female'. The 'Date of Birth \*' field is labeled 'Specify date in format like 25/3/1987' and has a text input box. A blue 'Save' button is located at the bottom left of the form area.



**Step 5:** Now, you will have to enter your salary details such as employer's name, employee type.

Once the salary information is filed, you can fill the other income details such as income from house property, capital gains, fixed deposit and so on.

### Salary Information

Please provide this information as per your Form-16 Part-B.  
You can match each item with the field number in your Form-16.

[CLICK TO SEE SAMPLE](#)

1(a). Salary As Per Sec 17 \*

1(b). Value of Perquisites

1(c). Profits in Lieu of Salary

2. Exempt Allowances under section 10

3. Balance (1 - 2) Auto-calculated

4. Deductions under section 16

Income Chargeable under the head 'Salaries' Auto-calculated

### TDS Details

TAN of the Employer\* \*

In your Form-16, find this under Part-A - TAN of Deductor

[CLICK TO SEE SAMPLE](#)


Tax Deducted at source on Salary \*

In your Form-16, find this under Part-A: Total of Amount of tax deducted / Deducted

[CLICK TO SEE SAMPLE](#)

[Save](#) or if you changed jobs during the year [Save and Add another Salary](#)

**Step 6:** Enter investment details for deductions to be claimed (For example, LIC, PPF, health insurance premium) and claim other tax benefits here.


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1. PERSONAL INFO

2. INCOME SOURCES

3. DEDUCTIONS

4. TAXES PAID

5. TAX FILING

A. SECTION 80 DEDUCTIONS

B. MORE DEDUCTIONS

C. OTHER DEDUCTIONS

### Deductions Under Section 80

#### Investments under Section 80C

You can claim a deduction of upto Rs. 1,50,000 under this section. Add up all your 80C deduction and specify total amount here. [READ MORE](#)

**Investment for Section 80C**

Section 80C includes contributions to LIC / Insurance premium, PPF, EPF, NSC, ELSS Mutual Funds, Children school fees, Payment of Principal in Housing Loan & other eligible items.

**PRO-TIP:** For the current financial year, try to invest Rs. 1,50,000 in 80C to maximise on tax savings.

The Tax Department does not require you to submit documents related to deductions while e-Filing.

Just keep the documents / receipts in case the Tax Department requests you for them later on.

#### Section 80TTA: Deduction for Interest earned on Savings Bank Account

**Interest earned on Savings Bank Account**

You do not need to enter a value for the 80TTA deduction here. Tax automatically picks it up from your declared interest income from Saving Bank account

[Save](#)

#### Get a CA to file your return

Filing return yourself is **Free**.  
If you need a CA's help, you can opt for our paid plans starting ₹799.

[SEE PLANS](#)

**Step 7:** In this step, you can populate your TDS details by uploading the Form 26AS. We will populate your TDS details only.



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[Need Help?](#)

[Buy CA Plan](#)

[My Account](#)



1. PERSONAL INFO

2. INCOME SOURCES

3. DEDUCTIONS

4. TAXES PAID

5. TAX FILING

A. TDS

B. SELF TAX PAYMENTS

## Taxes Deducted/Collected at Source

[Go To Next >>](#)

Specify TDS/TCS which was deducted between the period of April 1, 2018 to March 31, 2019.

Please Note : Tax deductions from your Salary by your employer should be entered [here](#).

Do you have a Form 26AS? [Click here to upload your Form 26AS](#) and avoid manual entry.

### TDS on Salary Income

These are your Salary TDS entries. If you have more entries to add, please add them on [Income from Salary Page](#).

Status	S.No.	Name of Employer	TDS Deducted	Salary Income
	1			

**Step 8:** Here you can add the details of taxes paid by you for the particular financial year. These taxes include advance tax and self assessment tax.



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[Need Help?](#)

[Buy CA Plan](#)

[My Account](#)



1. PERSONAL INFO

2. INCOME SOURCES

3. DEDUCTIONS

4. TAXES PAID

5. TAX FILING

A. TDS

B. SELF TAX PAYMENTS

## Summary of Taxes Paid: Advance Tax and Self Assessment Tax

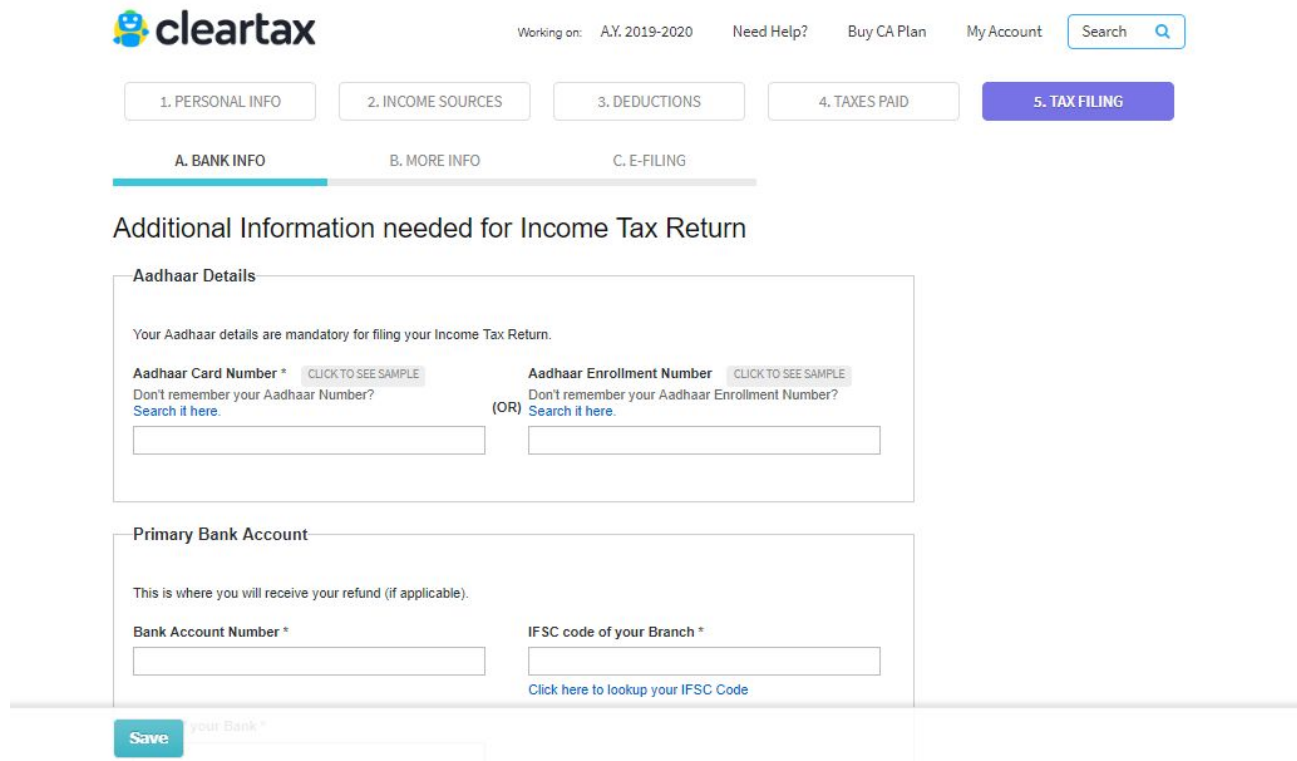
Would you like to add entry on Taxes Paid?

Add entries here if you **voluntarily** deposited taxes to the government. Note: This is separate from TDS. This is tax you deposited to the government via Challan 280.

[Add Entry](#)

[Go to Next >>](#)

**Step 8:** In this step, you will have to enter your aadhaar number and primary bank account (the account where you want your tax refund to be credited) details.



The screenshot shows the ClearTax website interface for the '5. TAX FILING' step. The top navigation bar includes the ClearTax logo, 'Working on: AY: 2019-2020', 'Need Help?', 'Buy CA Plan', 'My Account', and a search bar. Below this is a progress bar with five steps: 1. PERSONAL INFO, 2. INCOME SOURCES, 3. DEDUCTIONS, 4. TAXES PAID, and 5. TAX FILING (highlighted in purple). Under the progress bar, there are three sub-sections: A. BANK INFO (highlighted with a blue bar), B. MORE INFO, and C. E-FILING.

The main heading for this section is 'Additional Information needed for Income Tax Return'. Below this, there are two main sections: 'Aadhaar Details' and 'Primary Bank Account'.

**Aadhaar Details**

Your Aadhaar details are mandatory for filing your Income Tax Return.

**Aadhaar Card Number \*** [CLICK TO SEE SAMPLE](#) **Aadhaar Enrollment Number** [CLICK TO SEE SAMPLE](#)

Don't remember your Aadhaar Number? [Search it here.](#) (OR) Don't remember your Aadhaar Enrollment Number? [Search it here.](#)

Below the text are two input fields for the Aadhaar Card Number and Aadhaar Enrollment Number.

**Primary Bank Account**

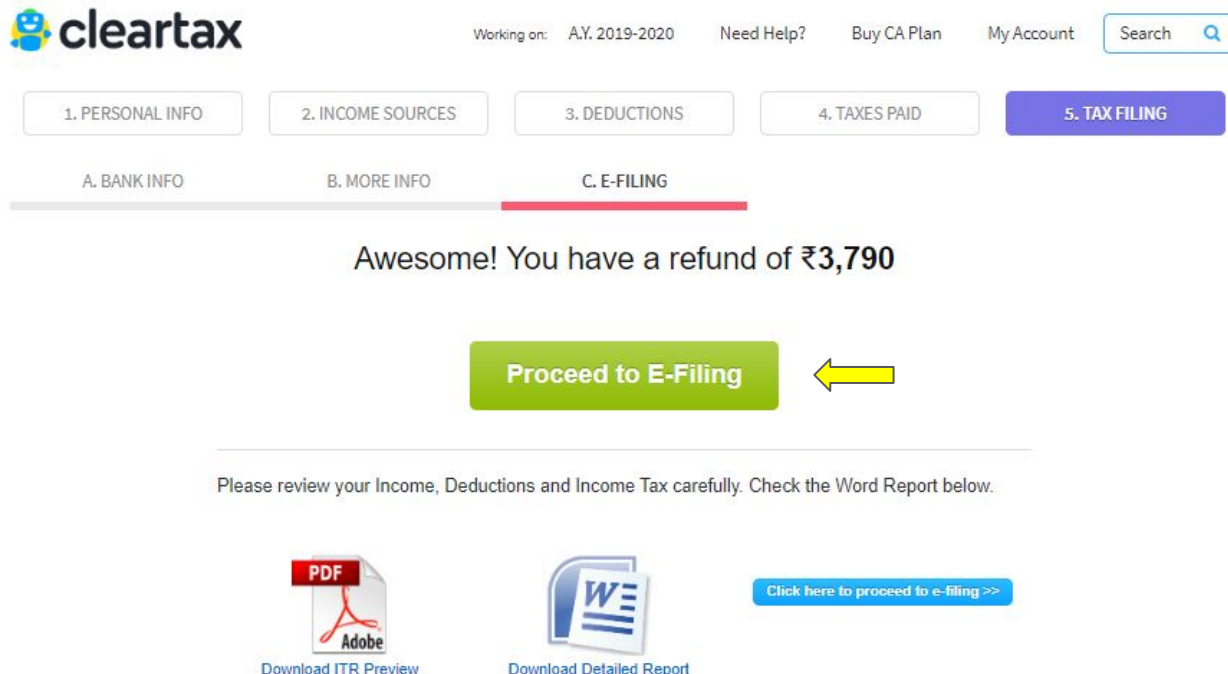
This is where you will receive your refund (if applicable).

**Bank Account Number \*** **IFSC code of your Branch \***

Below the text are two input fields for the Bank Account Number and IFSC code. A link [Click here to lookup your IFSC Code](#) is provided below the IFSC input field.

At the bottom left, there is a 'Save' button and a partially visible input field labeled 'your Bank \*'.

**Step 9:** This screen will appear in case you have a 'Tax Refund' or 'No Tax Due'. Further, click on proceed to e-Filing. You will get an acknowledgement number on the next screen.



The screenshot displays the Cleartax e-filing interface. At the top, the Cleartax logo is on the left, and navigation links for 'Working on: AY. 2019-2020', 'Need Help?', 'Buy CA Plan', and 'My Account' are on the right. A search bar is also present. Below the navigation bar, a progress bar shows five steps: 1. PERSONAL INFO, 2. INCOME SOURCES, 3. DEDUCTIONS, 4. TAXES PAID, and 5. TAX FILING. Step 5 is highlighted in blue. Below the progress bar, a horizontal bar shows three sections: A. BANK INFO, B. MORE INFO, and C. E-FILING. Section C is highlighted in red. The main content area displays the message 'Awesome! You have a refund of ₹3,790' in a large, bold font. Below this message is a green button labeled 'Proceed to E-Filing'. A yellow arrow points to this button from the right. Below the button, a horizontal line separates the main content from a footer section. The footer section contains the text 'Please review your Income, Deductions and Income Tax carefully. Check the Word Report below.' Below this text are two icons: a PDF icon labeled 'Download ITR Preview' and a Word document icon labeled 'Download Detailed Report'. To the right of these icons is a blue button labeled 'Click here to proceed to e-filing >>'.

cleartax

Working on: AY. 2019-2020 Need Help? Buy CA Plan My Account Search

1. PERSONAL INFO 2. INCOME SOURCES 3. DEDUCTIONS 4. TAXES PAID 5. TAX FILING

A. BANK INFO B. MORE INFO C. E-FILING

Awesome! You have a refund of ₹3,790

Proceed to E-Filing

Please review your Income, Deductions and Income Tax carefully. Check the Word Report below.

Download ITR Preview Download Detailed Report

Click here to proceed to e-filing >>



**YAY! YOU ARE DONE.** Your income tax returns has been successfully filed for FREE within 7 minutes.



**Simplifying financial lives**



For any further queries, write to us at [support@cleartax.in](mailto:support@cleartax.in).