



Ascent Consulting Services Pvt. Ltd.

User Guide for Employee Proof Submission - Lumen IT India Pvt Ltd





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About Ascent Consulting Services Private Limited

People Management is a key business function that has a direct impact on the competitiveness, efficiency of operations, and long-term profitability of an organization. Organizations invest enormous time and resources in the HR function; which diverts focus from the organization's core business.

Ascent Consulting addresses this anomaly through its 360 degree HR Management Solutions that transform HR service delivery. While these solutions accomplish cost reduction, greater efficiencies and improved quality, our larger effort is aimed at improving organizational efficiency and not just creating incremental change.

AscentHR has achieved this by building the right mix of skills and knowledge required for an effective Outsourced HR Management function. Our solutions employ a matrix of technology, domain expertise, streamlined business workflow, and highly skilled people to create tangible, measurable performance improvements throughout the client's organization.

AscentHR is recognized as one of the most trusted partners in this business by clients around the world. We work as an extension of our client's business. Our management and delivery teams are passionate about building efficiencies in our client's business. Our bespoke technology solutions for HR needs are unique in the industry and are backed by the best of industry practices in Data management, Information Security, Data Privacy, Anywhere Access and user-friendly processes.

At AscentHR, we leverage automation through a robust, configurable and comprehensive **HRMS** application, which caters to diverse organizational strategies and standards.





Preface

About this Manual

This manual provides guidelines for the user on Employee Proof Submission Form(EPSF) – Employee can fill all the details like personal details, Previous employment, House Rent Reciept Submission (HRA), Housing loan/House Property lcome or Loss, Tax saving Investments Under Section 80C, Other Permitted Exemptions successfully in the application

Document Conventions

In this manual, certain words are represented in different fonts, and sizes. **Bold** indicates the name of menu items, options, dialog boxes, windows and functions.

This document has different strategies to draw user attention to certain pieces of Information. Based on critical information, these items are marked as a note, and tip.

Icon	Purpose
8	Note
0	Tip

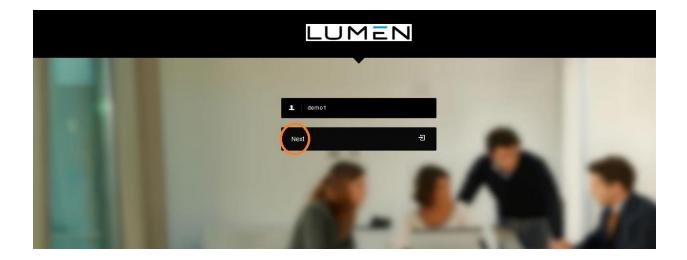


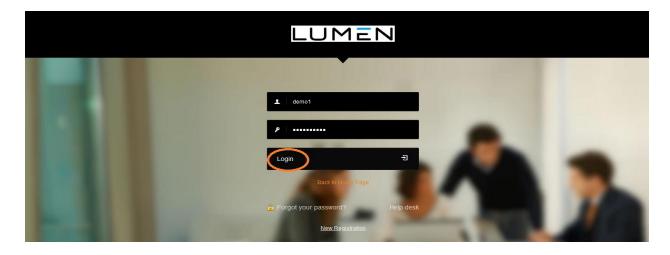


Getting Started

Login to the Application

- Perform following steps to login to the application:
 - Open a web browser.
 - Enter the address and navigate to application login screen.
 - Enter the **username** and click the **Next** button to enter password.
 - Enter the **password** and click the **Login** button. You are navigated to the **Home** page.



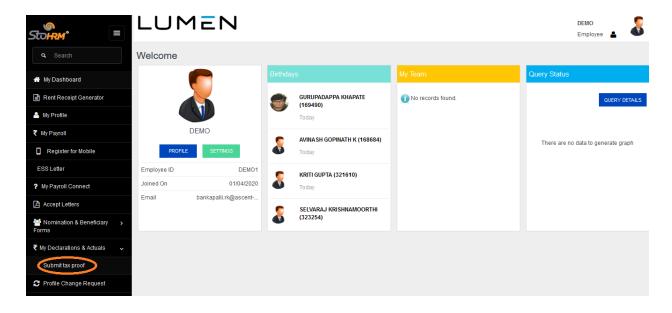


Please make sure that valid credentials are entered.

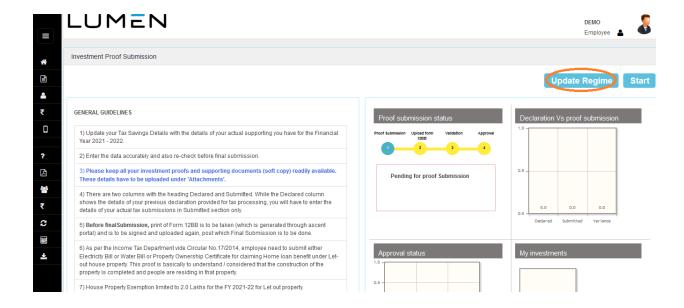




Selecting Income Tax Regime



• Expand **My Declarations and Actuals** menu and select **Submit tax proof** Sub-menu. You can view the **Update Regime** page displayed.



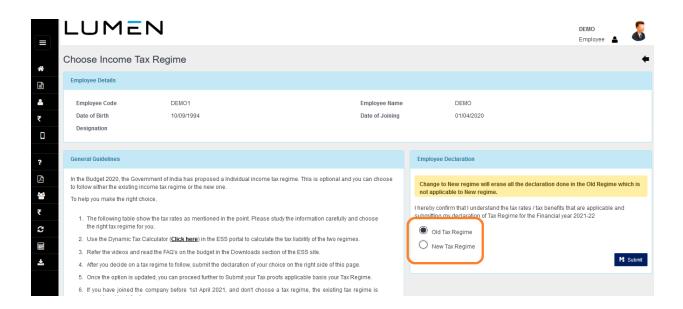


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Select the correct tax regime under the page shown below. Regime once selected, can also be changed back to **other until Final Submission** is clicked.

But after final submission of the tool is done, regime cannot be changed again.



Note:

- The Budget has proposed a New Tax regime in addition to the existing, i.e. old Tax Regime. However, the New Tax Regime is optional.
- The employee can select either the New Tax regime or Old Tax regime depending on tax planning.
- Under new tax regime, the employees are liable to pay lower taxes, provided they forego their deductions and exemptions.

New Tax Regime

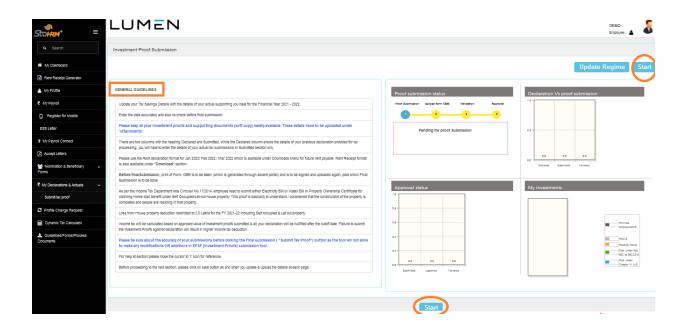
- View the following sections if New Tax Regime is selected:
- 1. Previous Employment tab (In case employee has joined after April 2021).
- 2. Housing Loan tab House Property Income Let Out Property (Sec 24(b)).





Old Tax Regime

• View the Investment Proof Submission page with the general guidelines.



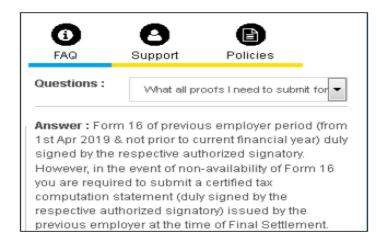
- View the following sections displaying the statistics based on the declaration submitted:
 - **Proof submission status**: Shows the proof submission process.
 - Declaration vs proof submission: Shows the statistics of proof submitted and Variance.
 - Approval status: Shows the statistics of proof submitted, approved and variance.
 - My investments: Shows the declared forms statistics in a pie chart.

Click the **Start** button. You can view the **Investment Proof Submission** page displayed with declaration forms.





- View the **Investment Proof Submission** page displayed with following options:
- 1. FAQ (Frequently Asked Questions)
- 2. Support
- 3. Policies
- 4. Declared amount Status.
- Declaration forms
- 1. **FAQ**: Shows the Frequently asked questions (FAQs) and answers on a particular topic.
- Select the **FAQ** tab. You can view the list of frequently asked questions (FAQs) listed regarding the EPSF.
- Select the required question from list and view the answer for the question Displayed

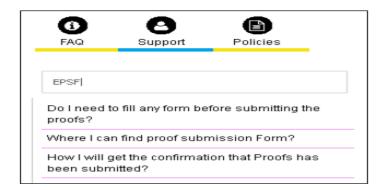








- 2. Support: Shows the resolved queries of EPSF.
 - Select the Support tab. You can view a free textbox.
 - Enter the query regarding the EPSF.
 - View a list of question as per the entered keyword.
 - Select the required question and view the answer.



- 3. **Policies:** Policies are principles, rules, and guidelines that has been agreed to officially by a group of people, a business organization, or a government.
 - Click the Policies tab. You can view policies of EPSF.



- 4. Declared amount Status: View the declared amount status updated based on following options.
- Declared Amount: displays the amount which employee has declared.
- **Submitted Amount**: displays the amount for which the proofs are submitted.
- Approved Amount: displays the amount, which has been approved by the approver.
- 5. **Declaration forms**: Personal details, HRA, Housing Loan, Other Income details and declarations tabs to enter the details to submit tax proof.





Declaring the Investment for Proof Submission

Filling Personal details



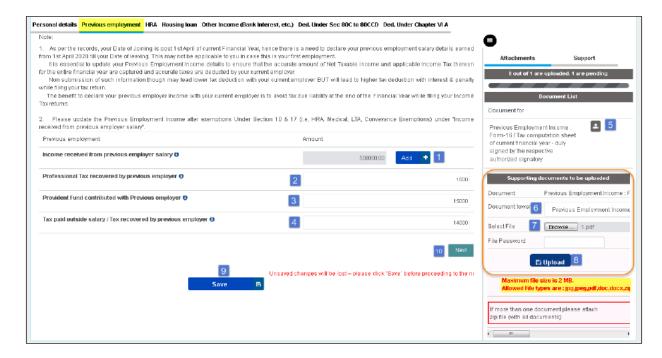
- 1. View the **Personal details** tab selected.
- 2. Update the number of children, mobile number and address details.
- 3. If the **No. of children** field is updated then you have to add the family member details.
- 4. Click **Add** icon to add more than 1 family member details.
- 5. Click the Save button.
- 6. Click the **Previous employment** tab.





Filling the Previous Employment details

• The employee, who has joined the organization in current financial year, has to update the previous company current financial year income, if an employee's first job, then no need to be update.



- View **Previous Employment** form page displayed. Perform following tasks to fill the **Previous Employment** form:
- 1. Click the **Add** button. You can view the **Pervious Employment Section** page displayed.
- 2. Enter the **Pervious Employment** income details and click the **Save** button.

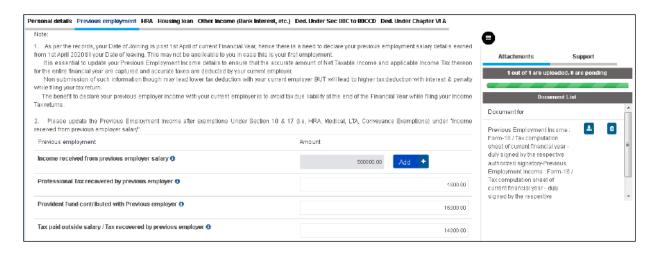




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- 3. View the entered pervious employment amount displayed in **Income received** from previous employer salary.
- 4. Enter the values in following fields:
- Professional Tax recovered by previous employer
- Provident Fund contributed with Previous employer
- Tax paid outside salary / Tax recovered by previous employer
- Upload the supporting document.
- Select the **Document Towards** from the dropdown as per the form.
- Click the Browse option to browse the document from specified location.
- If file is password protected, then enter the file password.
- Click the **Upload** to upload the document.
- Click the Save button.
- View the updated details and uploaded document
- View the Submitted amount updated

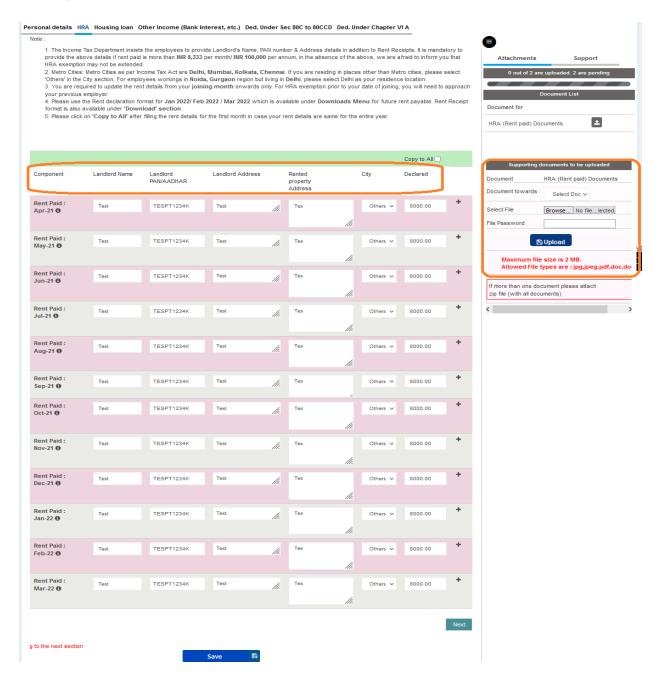


Click the Next button and view the HRA tab selected.





Filling the HRA details







- 1. View the **HRA** form page displayed.
- 2. Fills the mandatory information in the form.
- 3. Check the **Copy to All** check box, then the information entered in the single row copies to all the remaining rows.
 - 4. Upload the supporting document.
 - 5. Clicks the **Save** button. You can view the **Housing loan** tab displayed.

Note: The few forms required multiple documents to upload for approval, in such instances, you have an option to select respective document type category in the upload section.

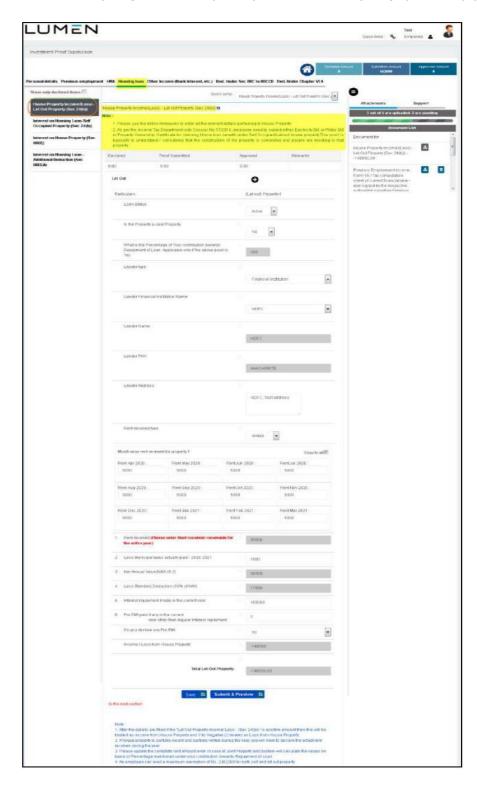
Filling Housing Loan Details

- Under Housing loan section you can view four applications forms.
- 1. House Property Income/(Loss) Let Out Property (Sec 24(b))
- 2. Interest on Housing Loan-Self Occupied Property (Sec 24(b))
- 3. Interest on House Property (Sec 80EE)
- 4.80EEA





House Property Income/ (Loss) - Let Out Property (Sec 24(b))







- 1. Fills all the relevant and mandatory details in the form.
- Select Yes or No as value from Is the Property a Joint Property.
 - If Yes then enter the percentage of your contribution towards repayment of loan.
 - If Joint Property value is Yes and your percentage is 100, then you need to submit the details displayed as shown in the figure below.



- Select Rent received type.
- Enter the value in the Interest repayment made in the current year.
- Do you declare any Pre EMI?
- View the **Total Let Out Property** value.
- Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- **5.** Click the **Add** icon to add another let out property details.
- 6. Click the **Next** button to navigate to the **Interest on Housing Loan-Self Occupied Property (Sec 24(b))** form.

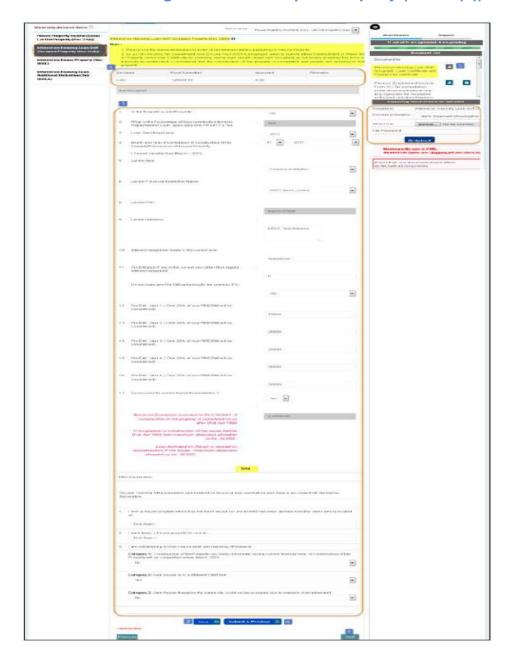
Note:

- The few forms required multiple documents to upload for approval, in such instances, you have an option to select respective document type category in the upload section.
- Only 3 let out columns must be added.





Interest on Housing Loan-Self Occupied Property (Sec 24(b)) details



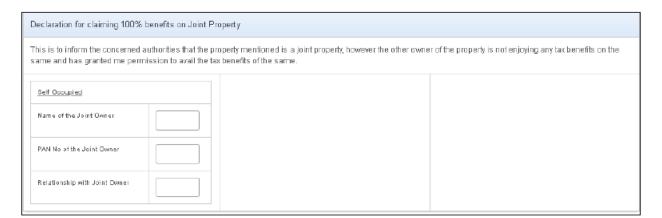




- 1. Select **Yes** or **No** as value from **Is the Property a Joint Property**.
- If Yes, then you have to enter the name of the co-applicants.



- 2. Enter the percentage of your contribution towards repayment of loan.
 - If **Joint Property** value is **Yes** and your percentage is **100**, then you need to submit the details displayed as shown below

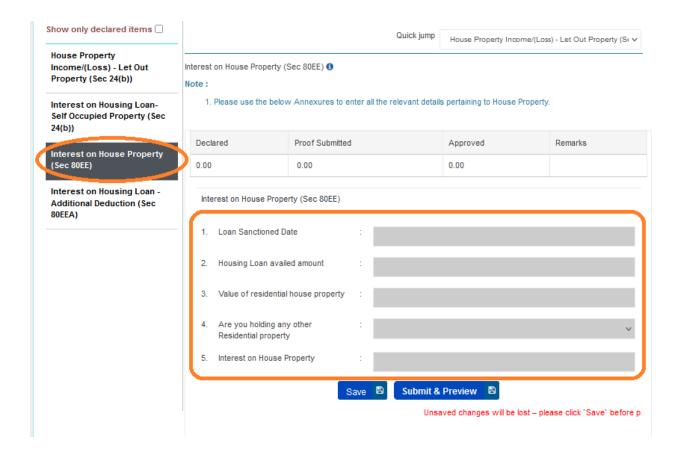


- Enter the mandatory details and view the **Total exemption** value.
- Enter the details under the HRA Declaration.
- Click the Save button for later submission.
- 4. Upload the supporting document.
- Click the Submit & Preview button to submit the proof. The details entered cannot be edited and this will take you to Form 12BB page.
- Click the Next button to navigate to the Interest on Housing Loan-Self Occupied.





Interest on Interest House property (Sec 80EE)

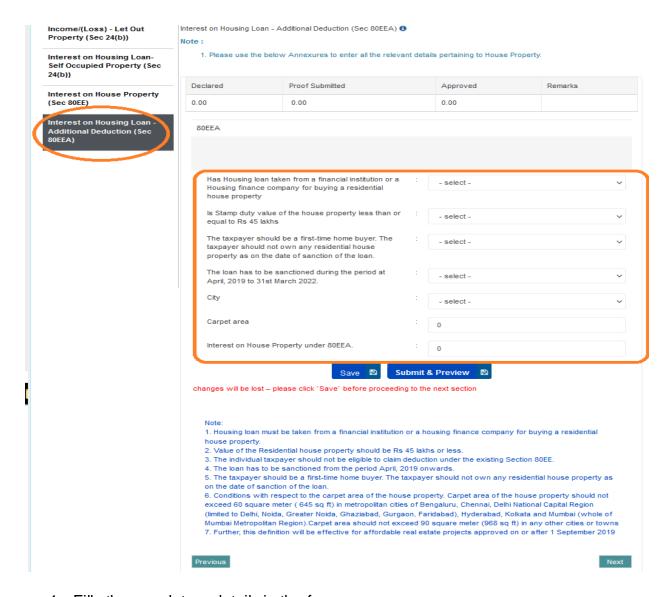


- 1. Fills the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 4. Click the **Next** button to navigate to the **Interest on Housing Loan Additional Deduction (Sec 80EEA).**





Interest on Housing Loan - Additional Deduction (Sec 80EEA)



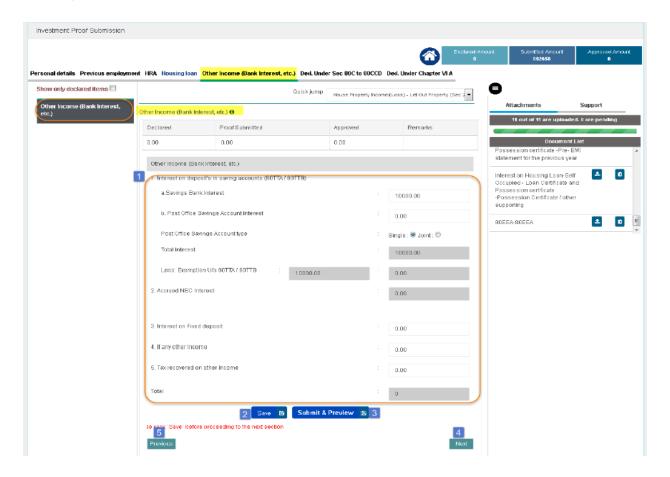
- 1. Fills the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.





- 5. Click the **Next** button to navigate to the **Other Income form.**
- 6. Click the **Previous** button to navigate to the previous form.

Filling the Other Income Details



- 1. Fills the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 4. Click the **Next** button to navigate to the **Ded. Under Section 80C.**
- 5. Click the **Previous** button to navigate to the previous form.





Filling the Ded. Under Section 80C to 80CCD details

- Under Section 80C to 80CCD, declare the Investments under following sections:
- 1. Deduction under Life Insurance Pension Scheme (Sec 80CCC)
- 2. Public Provident Fund
- 3. Children Education Expenses
- 4. National Savings Certificate (NSC)
- 5. Life Insurance Premium
- 6. Housing Loan Principal Repayment
- 7. Others Post Office Savings Schemes, Tax Saver Term Deposit 5 years
- 8. Sukanya Samriddhi Scheme
- 9. Long term Infrastructure bonds (80CCF)
- 10. Mutual Funds / ULIP
- 11. Employees contribution towards NPS

Deduction under Life Insurance Pension Scheme (Sec 80CCC) form



- Enter the Deduction under Life Insurance Pension Scheme (Sec 80CCC) value in textbox.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- Click the Submit & Preview button to submit the proof. The details entered cannot be edited and this will take you to Form 12BB page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.





Public Provident Fund details in the form

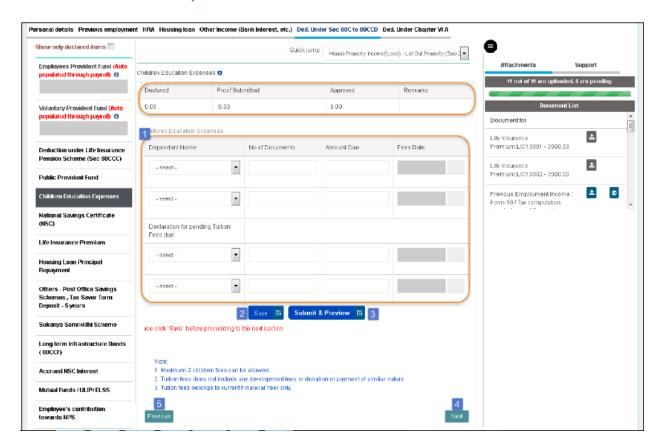


- 1. Enter the **Public Provident Field** value in the text box.
- 2. Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.





Children Education Expenses details in the form



- 1. Enter the mandatory details.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.





National saving certificate (NSC) details

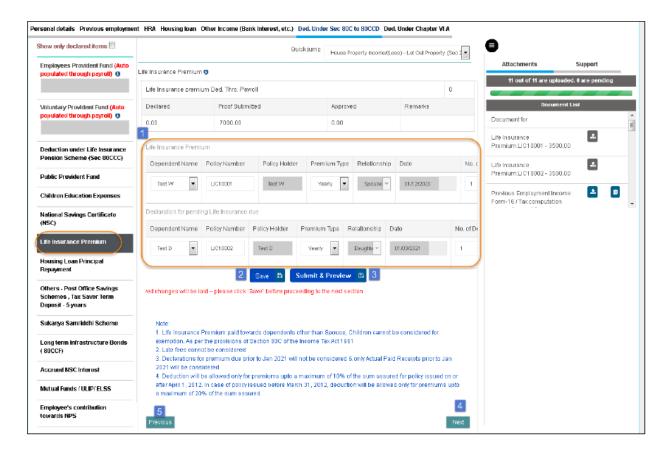


- 1. Enter the **National savings certificate** value in the text box.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the Next button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.





Life Insurance Premium details



- 1. Enter the mandatory details.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.



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Housing Loan Principal Repayment details



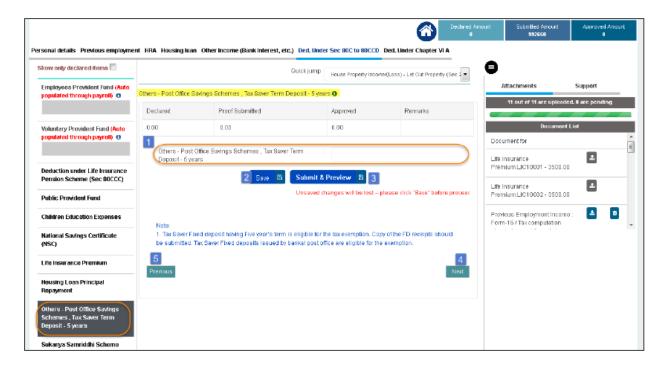
- 1. Enter the Housing loan principal repayment value in the text box
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.



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Others - Post Office Savings Schemes, Tax Saver Term Deposit - 5 years Details

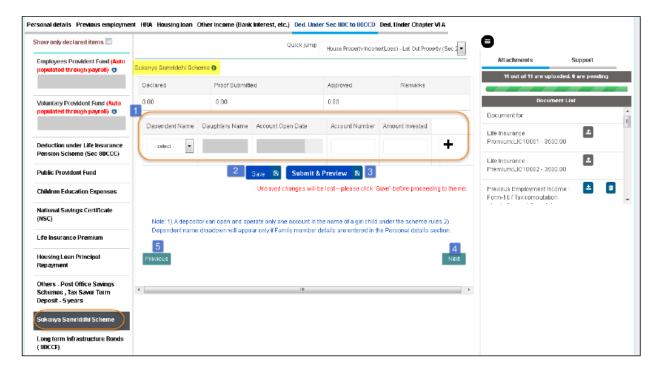


- 1. Enter the others- post office savings scheme, Tax Saver Term Deposit 5 years' value in the text box.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.





Sukanya Samriddhi Scheme details



- 1. Enter the Dependent name, account number and amount invested value.
- 2. Click the **Add** icon to add another dependent name, account number and amount invested value.
- 3. Click the **Delete** icon to delete the added details.
- 4. Click the **Save** button for later submission.
- 5. Upload the supporting document.
- 6. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 7. Click the **Next** button to navigate to the next form.
- 8. Click the **Previous** button to navigate to the previous form.



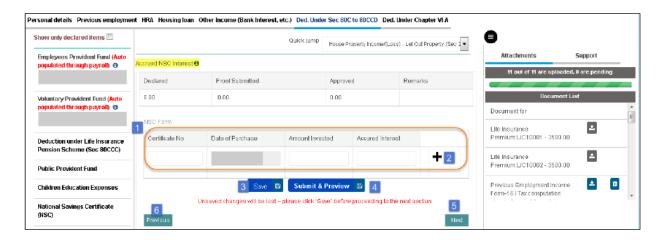


Long Term Infrastructure Bond details



- 1. Enter the Long term infrastructure bond (80CCF) value in text box.
- 2. Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the Next button to navigate to the next form.
- 6. Click the **Previous** button to navigate to the previous form.

Accrued NSC Interest details



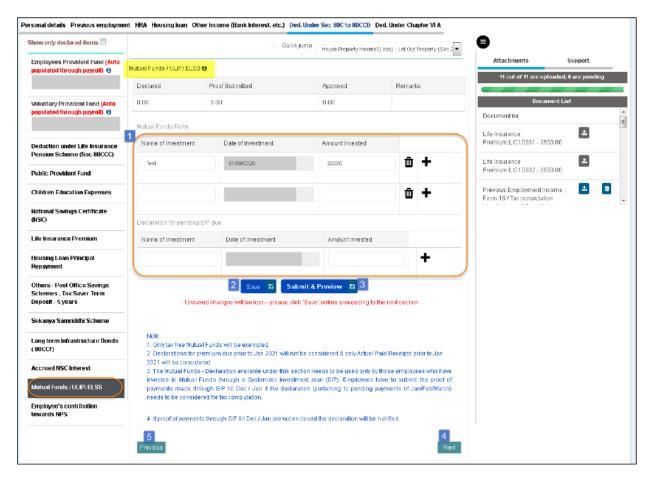
- 1. Enter the NSC form details with certificate number.
- 2. Click the **Add** icon to add another certificate.
- 3. Click the **Delete** icon to delete the added details.
- 4. Click the Save button for later submission.





- 5. Upload the supporting document.
- 6. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 7. Click the **Next** button to navigate to the next form.
- 8. Click the **Previous** button to navigate to the previous form.

Mutual Funds / ULIP details



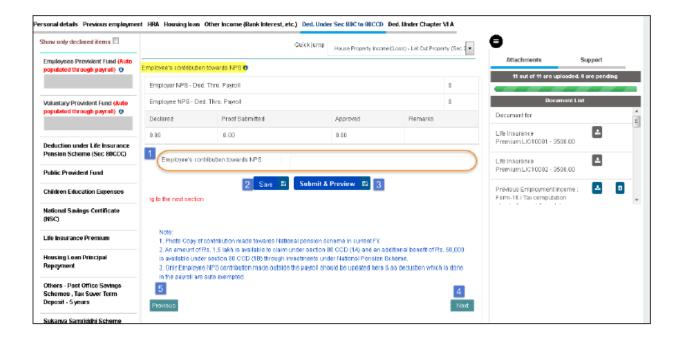
- 1. Enter mandatory details in the form.
- 2. Click the Add icon to add another mutual fund investment details.
- 3. Click the **Delete** icon to delete the added details.
- 4. Click the **Save** button for later submission.
- 5. Upload the supporting document.
- 6. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 7. Click the **Next** button to navigate to the next form.





8.Click the **Previous** button to navigate to the previous form.

Employees contribution towards NPS details in the form



- 1. Enter the **Employee contribution towards NPS** value in textbox.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to **Other Permitted Exemptions (Section 80D to 80 U)** section Click the **Previous** button to navigate to the previous form.

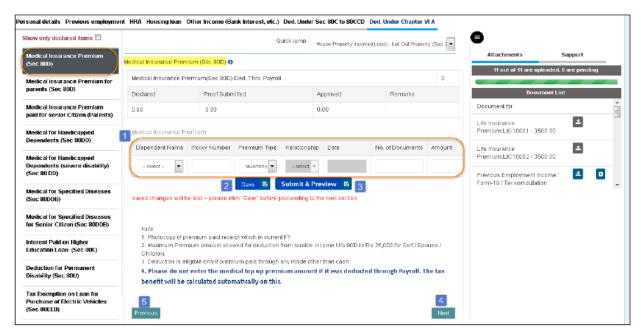




Filling the Ded. Under Chapter VI A (Section 80D to 80 U)

- Under Section 80D to 80 U, declare the Investments under following sections:
- 1. Medical Insurance Premium (Sec 80D)
- 2. Medical Insurance Premium for parents (sec 80D)
- 3. Medical Insurance Premium paid for senior Citizen (Parents)
- 4. Medical for Handicapped Dependents (Sec 80DD)
- 5. Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
- 6. Medical for Specified Diseases (Sec 80DDB)
- 7. Medical for Specified Diseases for Senior Citizen (Sec 80DDB)
- 8. Interest Paid on Higher Education Loan (Sec 80E)
- 9. Deduction for Permanent Disability (Sec 80U)
- 10.80 EEB

Medical Insurance Premium (Sec 80D) details

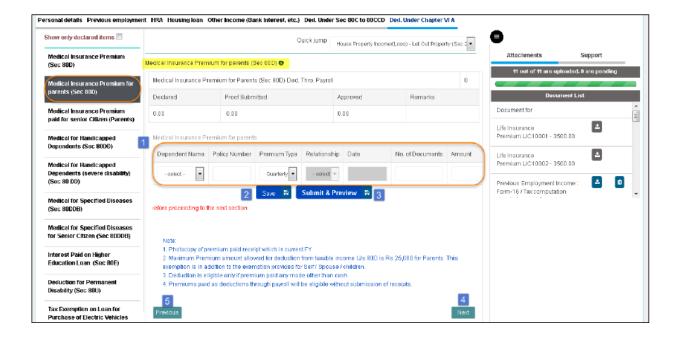


- 1. Fill the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.





Medical Insurance Premium for parents (Sec 80D) details



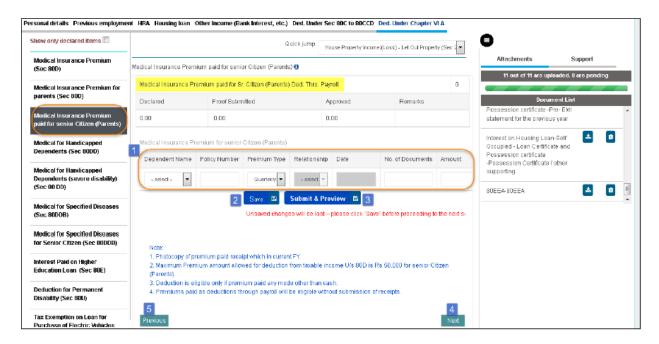
- 1. Fill the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.



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Medical Insurance Premium paid for senior Citizen (Parents) details

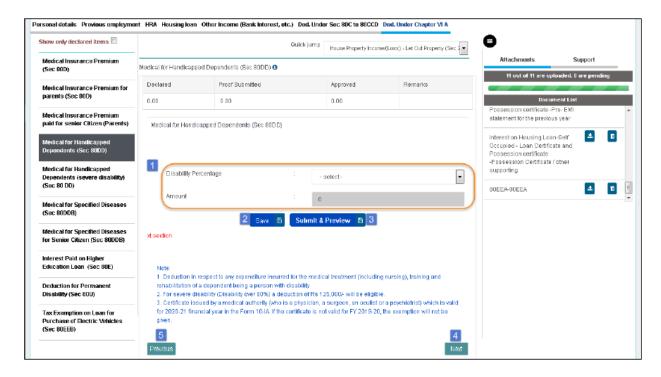


- 1. Fill the mandatory details in the form.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.





Medical for Handicapped Dependents (Sec 80DD) details



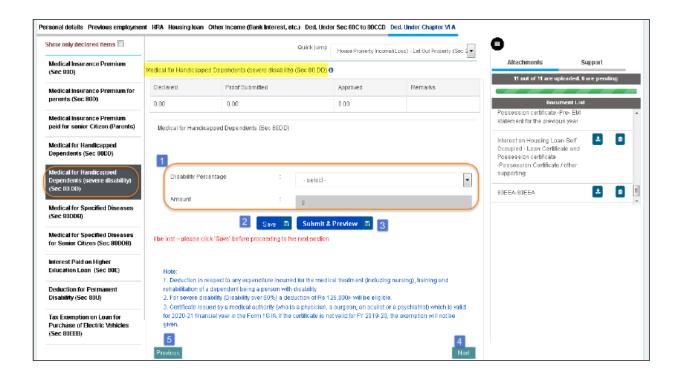
- 1. Select the Disability Percentage and enter the amount.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.



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Medical for Handicapped Dependents (severe disability) (Sec 80 DD) details



- 1. Select the Disability Percentage and enter the amount.
- 2. Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.

Note:

• Employee cannot claim for both Medical for Handicapped Dependents (Sec 80DD) and Medical for Handicapped Dependents (severe disability) (Sec 80 DD)



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Medical for Specified Diseases (Sec 80DDB) details



- 1. Enter the Medical for Specified Diseases (Sec 80DDB) value in the textbox.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.





Medical for Specified Diseases for Senior Citizen (Sec 80DDB) details

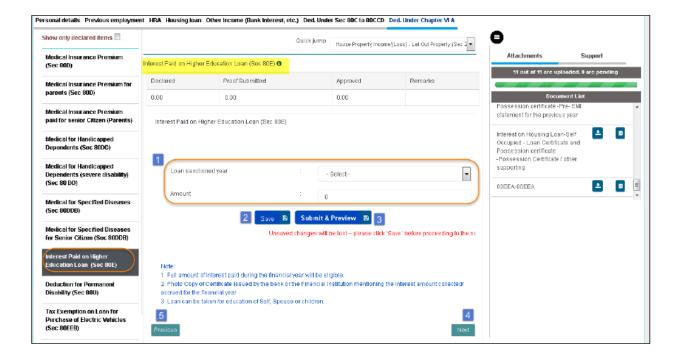


- 1. Enter the **Medical for Specified Diseases for Senior Citizen (Sec 80DDB**) value in the textbox.
- 2. Click the **Save** button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.





Interest Paid on Higher Education Loan (Sec80E) details

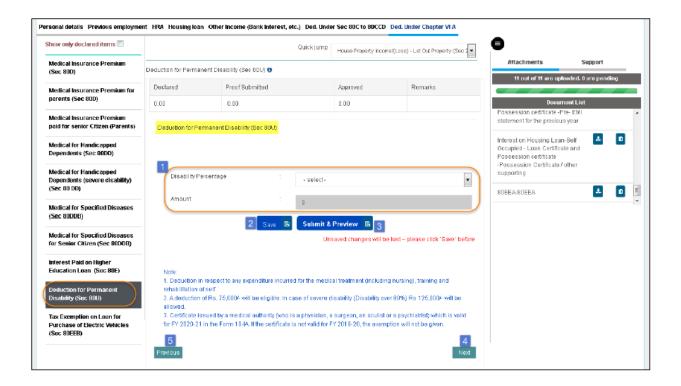


- Fill the mandatory details in the form.
- Click the Save button for later submission.
- Upload the supporting document.
- Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- Click the Next Button to navigate to the next form.





Deduction for Permanent Disability (Sec 80U) details

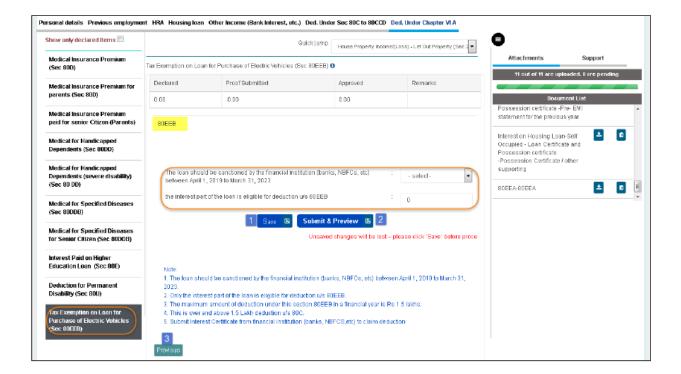


- 1. Select the Disability Percentage and enter the amount.
- 2. Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Next** Button to navigate to the next form.





80EEB details

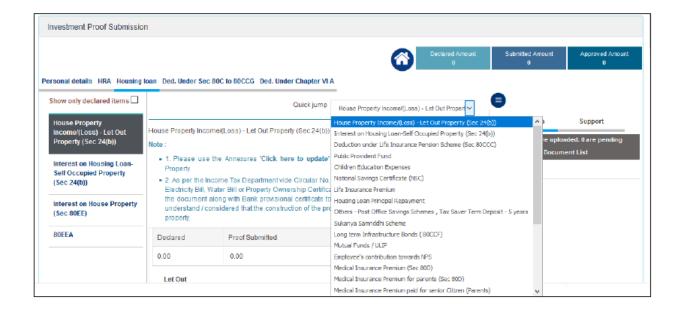


- 1. Fill the mandatory details in the form.
- 2. Click the Save button for later submission.
- 3. Upload the supporting document.
- 4. Click the **Submit & Preview** button to submit the proof. The details entered cannot be edited and this will take you to **Form 12BB** page.
- 5. Click the **Previous** Button to navigate to the previous form.





Fill the specific application through the quick jump option

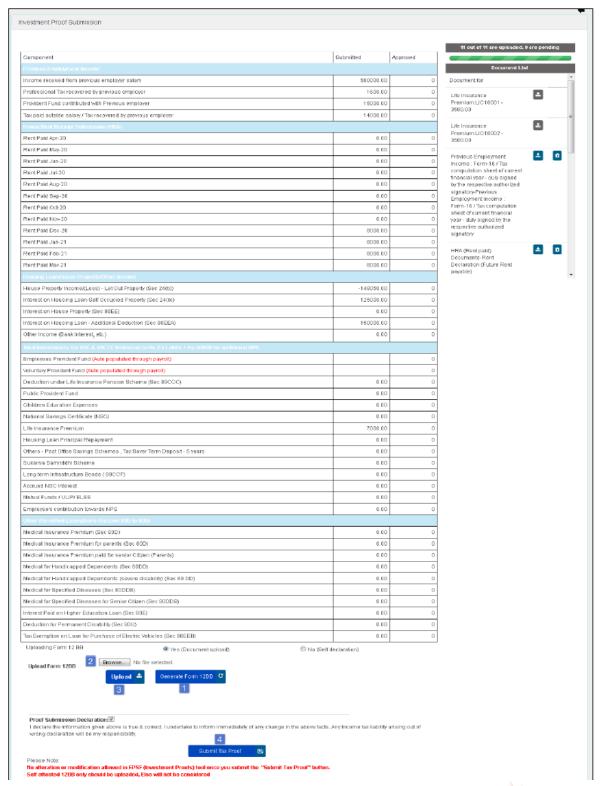


- Click Quick jump and view the forms listed.
- Select the required form and submit the details.





Submitting the Proof by Uploading form 12BB







- 1. Click Generate form 12BB.
- 2. View the generated form.
- 3. Save in specified location.
- 4. Click **Browse** to browse the form 12BB from specified location.
- 5. Click the **Upload** button to upload the browsed form.
- 6. View the **Re-Generate form 12BB displayed** to regenerating form 12BB if required before submission.
- 7. Acknowledge the **Proof Submission Declaration**
- 8. Click the **Submit Tax Proof** button to submit the proof.

OR,

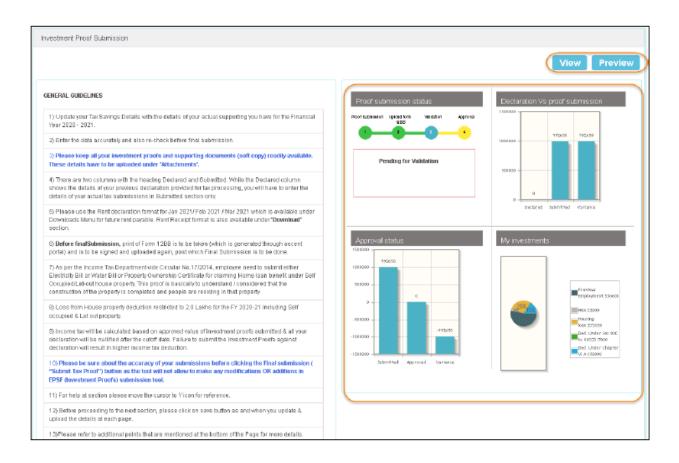
Click on second option of No (Self Declaration) as shown below. Tick the two check boxes and click on Final submit button.

By using this option, there is no need to upload manual 12 BB.

Medical Insurance Premium (Sec 80D)	0.00	0
Medical Insurance Premium for parents (Sec 80D)	0.00	0
Medical Insurance Premium paid for senior Citizen (Parents)	0.00	0
Medical for Handicapped Dependents (Sec 80DD)	0.00	0
Medical for Handicapped Dependents (severe disability) (Sec 80 DD)	0.00	0
Medical for Specified Diseases (Sec 80DDB)	0.00	0
Medical for Specified Diseases for Senior Citizen (Sec 80DDB)	0.00	0
Interest Paid on Higher Education Loan (Sec 80E)	0.00	0
Deduction for Permanent Disability (Sec 80U)	0.00	0
Tax Exemption on Loan for Purchase of Electric Vehicles (Sec 80EEB)	0.00	0
Uploading Form 12 BB		
Submit Tax Proof		







- View the updated details in the Investment Proof Submission main page.
- Click View to view the declared details.
- Click Preview to view the form 12BB details





Note:

- After submitting the income tax proof, a notification mail is triggered to employee with declaration details.
- The declared proof reaches the Ascent Payroll Team for approval.
- After approval procedure for proofs is completed, the employee will be provided an option to re-submit the rejected proofs (if any) within the period of 3 days.
- The employee has to modify the details and verify the details before re-submitting the final proof.



