

Tax Proof Submission Manual



INDEX

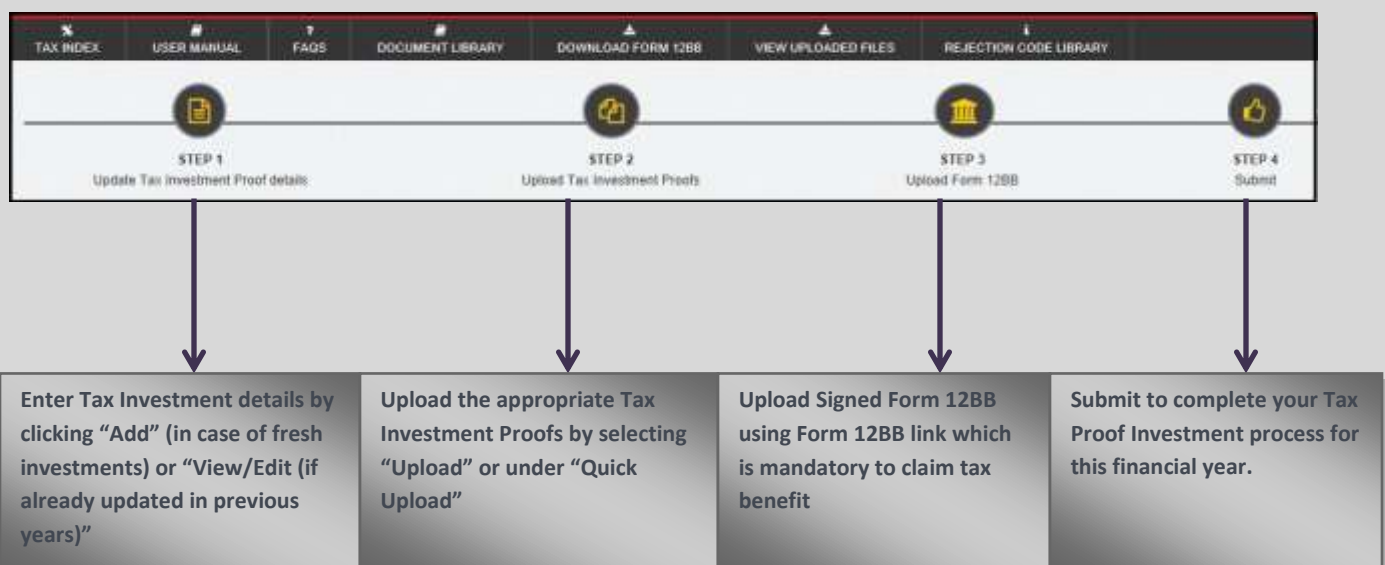
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Tax Proof Submission Manual

Allsec Online Tax Proof Submission

- Allsec introduces submission of investment proofs as soft copy through Employee Self Service (ESS) portal.
- Easy and hassle free way to submit the investment proof by employees.
- Soft copy investment proofs will be processed by Allsec.

Follow the simple steps mentioned below and upload soft copies of your investment proofs in the Allsec ESS web portal.



Important Note:

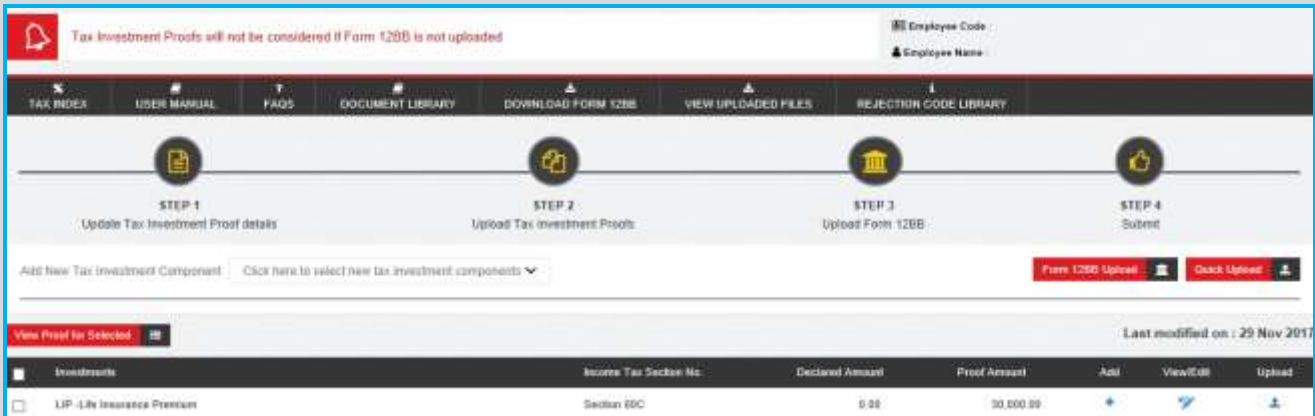
NO PROOF will be considered without uploading duly signed and scanned Form 12BB in Allsec ESS Portal.

Any Modification/Upload/Delete will not be permitted once Submit button is clicked.

Tax Proof Submission Manual

Accessing the Tax Proof Submission - Navigation

1. Logon to Allsec ESS portal
2. Select “Tax” menu
3. Under Tax drop-down select and click on “Tax Proof Submission”
4. Click on “Tax Proof Submission” to reach Tax Index page



The screenshot displays the 'Tax Proof Submission' interface. At the top, a red banner states: 'Tax Investment Proofs will not be considered if Form 12BB is not uploaded'. Below this, a navigation bar includes links: TAX INDEX, USER MANUAL, FAQs, DOCUMENT LIBRARY, DOWNLOAD FORM 12BB, VIEW UPLOADED FILES, and REJECTION CODE LIBRARY. The main area features a four-step process: STEP 1: Update Tax Investment Proof details, STEP 2: Upload Tax Investment Proofs, STEP 3: Upload Form 12BB, and STEP 4: Submit. A section for 'Add new Tax Investment Component' includes a dropdown menu and buttons for 'Form 12BB Upload' and 'Quick Upload'. Below this, a 'View Proof for Selected' button is visible. The bottom section shows a table with columns: Investments, Income Tax Section No., Declared Amount, Proof Amount, Add, View/Edit, and Upload. The table contains one entry for 'LIP - Life Insurance Premium' under Section 80C, with a Declared Amount of 0.00 and a Proof Amount of 30,000.00.

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> LIP - Life Insurance Premium	Section 80C	0.00	30,000.00	+		

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Tax Index Page

Tax Index displays current year declarations and available investments

User Manual to guide on usage of Tax Proof Module

FAQs tab contains FAQs related to Tax Proofs submission

Document Library contains all relevant documents and forms

Download Form 12BB to Generate Form 12BB

View Uploaded Files to view tax proof files uploaded

Rejection code library contains list of rejection codes with detailed description

View Proof for Selected

Updated proof can be viewed by using this option for the selected investments

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00	+		
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Fixed Deposit	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Tuition Fee	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Unit Linked Insurance Plan	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Sukanya Samriddhi Account Scheme	Section 80C	0.00	0.00	+		
<input type="checkbox"/> Medical insurance premium paid for Parent	Section 80D	0.00	0.00	+		
<input type="checkbox"/> 80DD - Disabled Dependant	Section 80DD	0.00	75,000.00			
<input type="checkbox"/> Loss from Letout Property	Section 24	0.00	0.00	+		
<input type="checkbox"/> 80EE - Additional Deduction on Home Loan Interest	Section 80EE	0.00	50,000.00			
<input type="checkbox"/> National Pension Scheme	Section 80CCD	0.00	15,015,852.00	+		

Submit







Any activity will not be permitted after submission


After uploading the Tax Investment Proofs and signed Form 12BB, Click **Submit** to complete the process


Any Modification/Upload/Delete will not be permitted once Submit button is clicked.



Step 1: Update Tax Investments Proof Details

A) To Add Fresh Investments:

- To add new Investments, select the investment type from drop down list “Add New Tax Investment Component”. **Refer in below picture A** 
- Page will be redirected to new window, to enter details for the selected investment. **Refer in below picture A** 
- After entering the required details for the selected investment, employee needs to click the “Save” button, then click “Ok”. Two “Save” buttons are available both in top and bottom of the window. Any of these “Save” button can be used. **Refer in below picture A**  & 
- To add another record for the selected Investment Type, click “Add Additional Line Item”. **Refer in below picture A** 
- To go back to Tax Index Page, Click “Back” button. **Refer in below picture A** 

 **Picture A**



Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		

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The screenshot shows the 'Life Insurance Premium' form. Callout 2 points to the 'Name of the Insurance Company' field. Callout 3 points to the 'Save' button at the bottom left. Callout 4 points to the 'Save' button at the top right. Callout 5 points to the 'Add Additional Line Item' button at the top left. Callout 6 points to the 'Back' button at the top right. An 'ALERT' box in the center states 'Save was successful' with an 'Ok' button.

B) To Edit Investments details updated in Previous Years:

- Click "Edit" icon available under "View/Edit" Column against respective Tax Investment type in Tax Index Page. Refer in below picture B **1**
- Page will be redirected to new window, to update previous year details for selected Investment Type. To edit Investment details updated during previous year, employee can click drop down and select Previous Financial Year which will display records updated during previous FY. Refer in below picture B **2**
- To modify any previous year records displayed, select respective record and click "Edit" Option. Refer in below picture B **3**
- Page will be redirected to new window to update the investment details for the selected record. Click "Save" and click "Ok". Refer in below picture B **4** & **5**

Picture B

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00			
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00			

Callout 1 points to the 'View/Edit' column header. A tooltip box says: 'Click here to update your proof details against your declaration'.

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Life Insurance Premium

Select Tax Investment Component
Life Insurance Premium

[Add Additional Line Item](#) [Back](#)

[View Proof for Selected](#) [Edit Selected](#) [Delete Selected](#) [All](#)

<input type="checkbox"/>	Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 17-18 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/>	LIC	0651963	07/07/2010	200000	10000	40000	

[Click here to update your proof details against your declaration](#)

Life Insurance Premium

[Add Additional Line Item](#) [Back](#)

[View Proof for Selected](#) [Edit Selected](#) [Delete Selected](#) [All](#)

ALERT
New record successfully added.

[Click here to update your proof details against your declaration](#)

C) Add new Investments against Investment Type:

- Click “Add” icon available under “Add” column in Tax Index Page against respective Investment Type to create new record. Refer in below Picture C **1**

Picture C

<input type="checkbox"/>	Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/>	Life Insurance Premium	Section 80C	0.00	40,000.00	+	View	Upload
<input type="checkbox"/>	Public Provident Fund	Section 80C	0.00	10,000.00	+	View	Upload
<input type="checkbox"/>	Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00	+	View	Upload

[Click here to add Proof details](#)

D) View/Edit/Delete Investments

- Click “Edit” icon available under “View/Edit” Column against respective Tax Investment type in Tax Index Page. Refer in below picture D **1**
- Page will be redirected to new window which will display list of existing proof details for selected Investment Type. To edit details, employee can either select “Edit” option available in that selected record. Refer in below picture D **2**
- To edit multiple records, select respective records and click “Edit Selected” link. Refer in below picture D **3**

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- To Delete Investment, select the respective record and click “Delete Selected” Option.
Refer in below picture D **4**

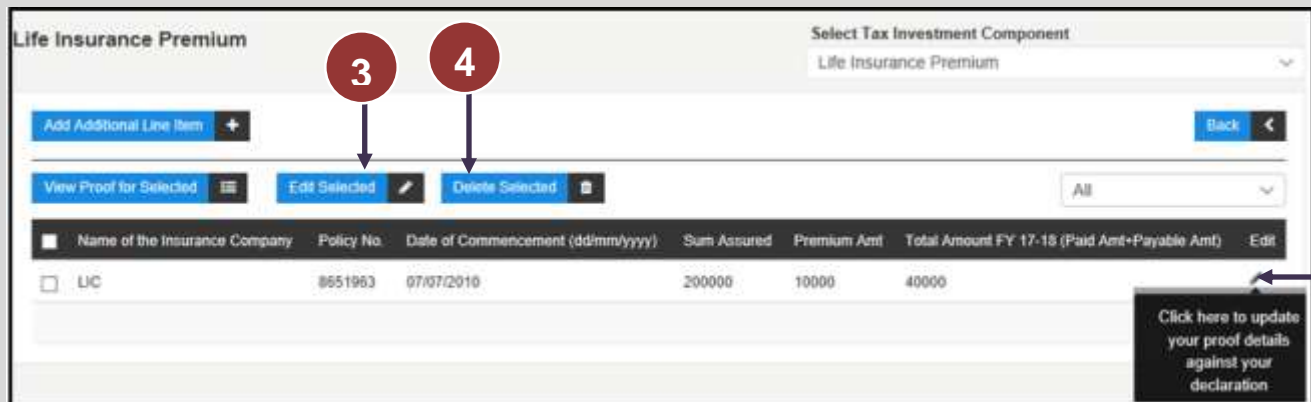
IMPORTANT NOTE: Any Investment details deleted cannot be ROLLED back.

Picture D



Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00			
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00			




Click here to update your proof details against your declaration




Life Insurance Premium

Select Tax Investment Component
Life Insurance Premium

Add Additional Line Item +


View Proof for Selected  Edit Selected  Delete Selected 

Name of the Insurance Company	Policy No.	Date of Commencement (dd/mm/yyyy)	Sum Assured	Premium Amt	Total Amount FY 17-18 (Paid Amt+Payable Amt)	Edit
<input type="checkbox"/> LIC	8651963	07/07/2010	200000	10000	40000	

Click here to update your proof details against your declaration

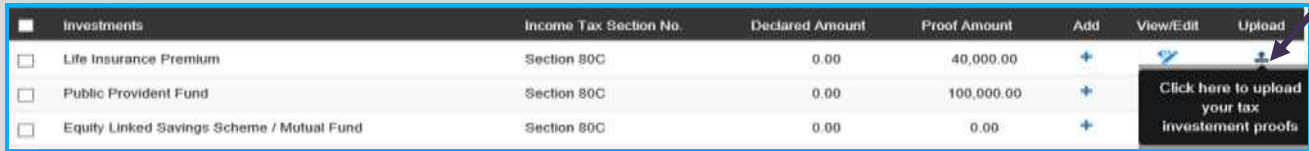
Step 2: To Upload Tax Investment Files

A) Normal Upload

- Once Investment details are updated for current year, then files can be uploaded.
- Click upload icon  to upload the file against respective investment type. Refer in below picture E **1**
- Click “Browse” to select the file from respective path and click “Upload” to upload the file.
Refer in below picture E **2**
- “File Uploaded Successfully” message will be displayed. Click “Ok” to proceed.
- Maximum File size that can be allowed is 10 MB and the file types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps

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Picture E



Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> Life Insurance Premium	Section 80C	0.00	40,000.00	+		
<input type="checkbox"/> Public Provident Fund	Section 80C	0.00	100,000.00	+		
<input type="checkbox"/> Equity Linked Savings Scheme / Mutual Fund	Section 80C	0.00	0.00	+		

Click here to upload your tax investment proofs

Normal Upload

Kindly do not upload password protected file. Password protected file will not be considered

Browse...

Upload

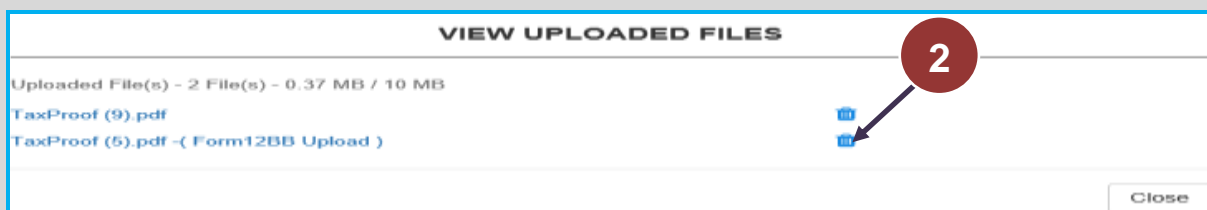
2

1. Maximum/Overall File size allowed for upload is 10 MB.
2. File types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps..
3. Form 12BB should not be uploaded here. It should be uploaded under "Form 12BB upload".

Close

- Uploaded Files can be deleted/removed using "Delete" option available under "View Uploaded Files" link.
Refer below picture G

Picture G






VIEW UPLOADED FILES	
Uploaded File(s) - 2 File(s) - 0.37 MB / 10 MB	
TaxProof (9).pdf	
TaxProof (5).pdf -(Form12BB Upload)	

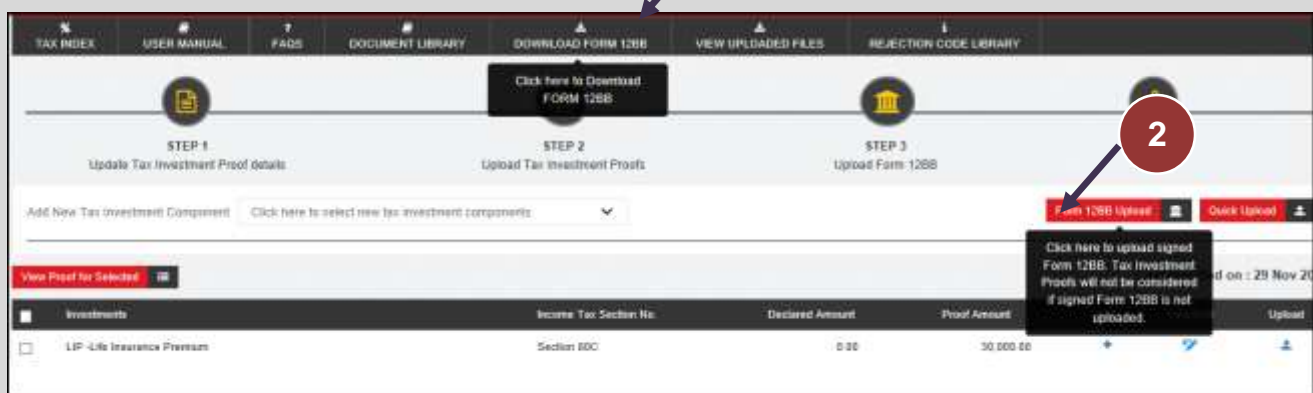
Close

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Step 3: Upload Form 12BB

- Click “Download Form 12BB” link in Tax Index Page to download Form 12BB PDF file.
Take Print, Sign & Scan and upload duly signed Form12BB using “Form 12BB Upload” link.
Refer below picture H  & 
- Click “Browse” to select duly signed Form 12BB PDF file from respective path and click “Upload” to upload the file. **Refer in below picture H **

Picture H



Form 12BB Upload

Kindly do not upload password protected file. Password protected file will not be considered



1. Maximum/Overall File size allowed for upload is 10 MB.
2. File types are restricted to .pdf, .jpg, .doc, .xls, .docx, .xlsx, .xps..
3. Only Form 12BB should be uploaded here.

Close

Important Note:

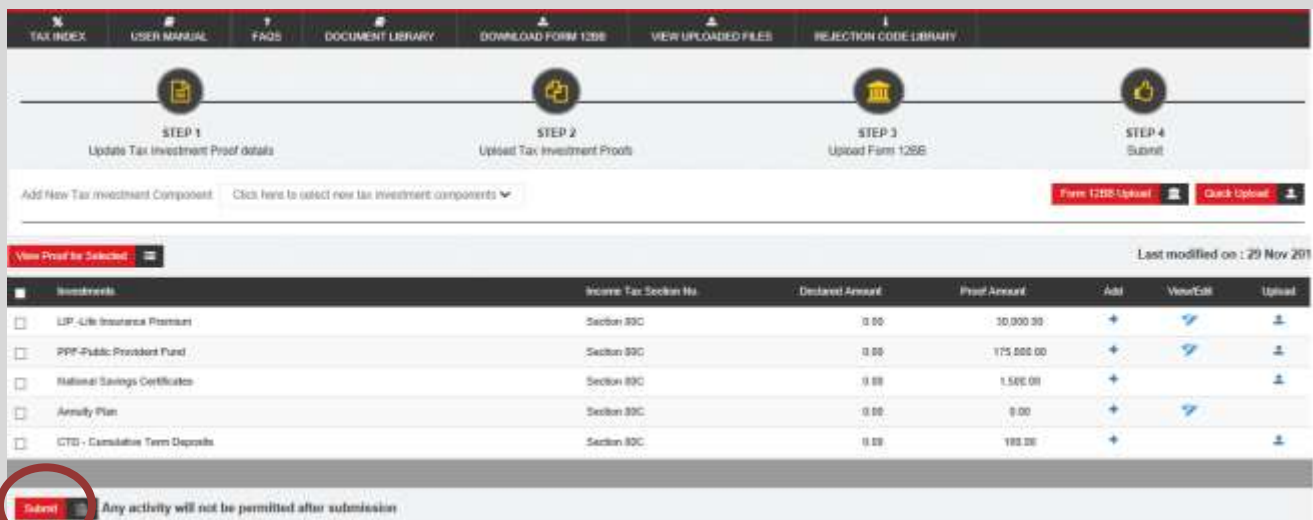
NO PROOF will be considered without duly signed and scanned Form 12BB is uploaded in Allsec ESS Portal.

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👉 Step 4: SUBMIT

- Click “Submit” button to complete your Tax proof Investment process for the financial year.
- Tax proof page will not be editable if final “Submit” is done. Refer in below picture 1

Picture 1



The screenshot shows the 'STEP 4: Submit' stage of the tax proof submission process. The interface includes a progress bar with four steps: STEP 1 (Update Tax Investment Proof details), STEP 2 (Upload Tax Investment Proofs), STEP 3 (Upload Form 1286), and STEP 4 (Submit). Below the progress bar, there are buttons for 'Form 1286 Upload' and 'Quick Upload'. A table lists various investment types with their respective declared and proof amounts. At the bottom, a red 'Submit' button is circled in red, with a red circle containing the number '1' pointing to it. A warning message states: 'Any activity will not be permitted after submission'.

Investments	Income Tax Section No.	Declared Amount	Proof Amount	Add	View/Edit	Upload
<input type="checkbox"/> LIP - Life Insurance Premium	Section 80C	0.00	30,000.00	+		
<input type="checkbox"/> PPF - Public Provident Fund	Section 80C	0.00	175,000.00	+		
<input type="checkbox"/> National Savings Certificate	Section 80C	0.00	1,500.00	+		
<input type="checkbox"/> Annuity Plan	Section 80C	0.00	0.00	+		
<input type="checkbox"/> CTD - Cumulative Term Deposits	Section 80C	0.00	100.00	+		

Clearance Status Display

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