



Ascent Consulting Services Pvt. Ltd.

User Guide for EPSF –v1.1
(Investment Proofs – Scan Copy)





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Preface

About this Manual

This guide will provide a detailed explanation of procedure to be followed for submitting Investment Proofs along with its supporting documents.

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.

Additionally we have used certain Icons in this document and the purpose are as below:-



Icon	Purpose
	Note
	Tip

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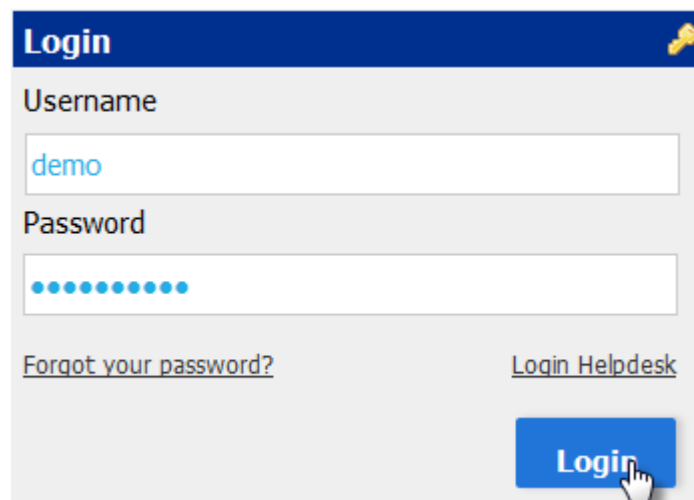
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Getting Started

Login to the application

In order to login to the application, follow these steps:

1. Open your internet browser.
2. Type the address in the **Address** bar and press **Ctrl + Enter**, to be navigated to login page as shown below.
3. Type your **Ascent Login credentials** and then click **Login** to navigate to respective user home page as shown in the below screenshot.



The screenshot shows a login form with a blue header bar containing the word "Login" and a yellow key icon. Below the header, there are two input fields: "Username" with the text "demo" and "Password" with masked characters (dots). Below the password field, there are two links: "Forgot your password?" and "Login Helpdesk". At the bottom right, there is a blue "Login" button with a hand cursor icon pointing to it.

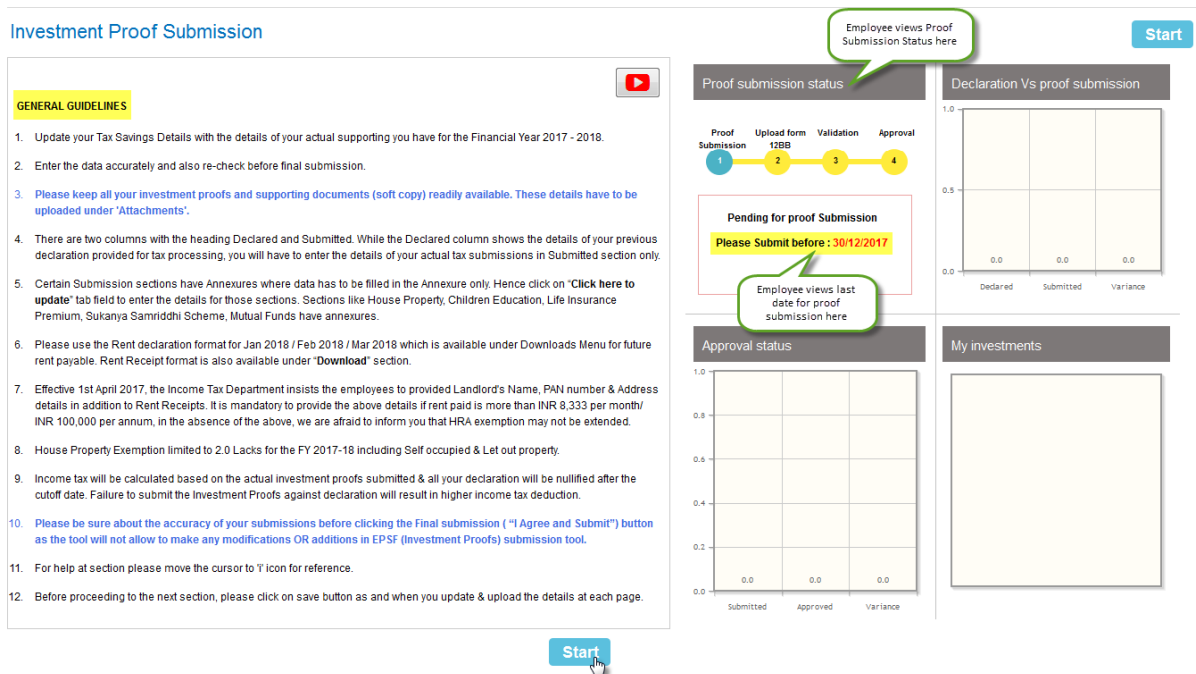
Figure 1: Login Page



Please make sure valid credentials are entered for successful login to application

General Guidelines

- Once you login, click on “Pay & Benefits” tab -> EPSF (investment Proof) Submission
- After you click on “**EPSF (investment Proof) Submission**” option, this will navigate you to “Investment Proof Submission Landing Page” page as shown below.



Investment Proof Submission

GENERAL GUIDELINES

1. Update your Tax Savings Details with the details of your actual supporting you have for the Financial Year 2017 - 2018.
2. Enter the data accurately and also re-check before final submission.
3. Please keep all your investment proofs and supporting documents (soft copy) readily available. These details have to be uploaded under 'Attachments'.
4. There are two columns with the heading Declared and Submitted. While the Declared column shows the details of your previous declaration provided for tax processing, you will have to enter the details of your actual tax submissions in Submitted section only.
5. Certain Submission sections have Annexures where data has to be filled in the Annexure only. Hence click on "Click here to update" tab field to enter the details for those sections. Sections like House Property, Children Education, Life Insurance Premium, Sukanya Samriddhi Scheme, Mutual Funds have annexures.
6. Please use the Rent declaration format for Jan 2018 / Feb 2018 / Mar 2018 which is available under Downloads Menu for future rent payable. Rent Receipt format is also available under "Download" section.
7. Effective 1st April 2017, the Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than INR 8,333 per month/ INR 100,000 per annum, in the absence of the above, we are afraid to inform you that HRA exemption may not be extended.
8. House Property Exemption limited to 2.0 Lacks for the FY 2017-18 including Self occupied & Let out property.
9. Income tax will be calculated based on the actual investment proofs submitted & all your declaration will be nullified after the cutoff date. Failure to submit the Investment Proofs against declaration will result in higher income tax deduction.
10. Please be sure about the accuracy of your submissions before clicking the Final submission ("I Agree and Submit") button as the tool will not allow to make any modifications OR additions in EPSF (Investment Proofs) submission tool.
11. For help at section please move the cursor to 'i' icon for reference.
12. Before proceeding to the next section, please click on save button as and when you update & upload the details at each page.

Proof submission status

Proof Submission 1, Upload form 12BB 2, Validation 3, Approval 4

Pending for proof Submission

Please Submit before : 30/12/2017

Declaration Vs proof submission

Declared	Submitted	Variance
0.0	0.0	0.0

Approval status

Submitted	Approved	Variance
0.0	0.0	0.0

My investments

Start

Figure 2: Employee reads general guidelines & clicks Start

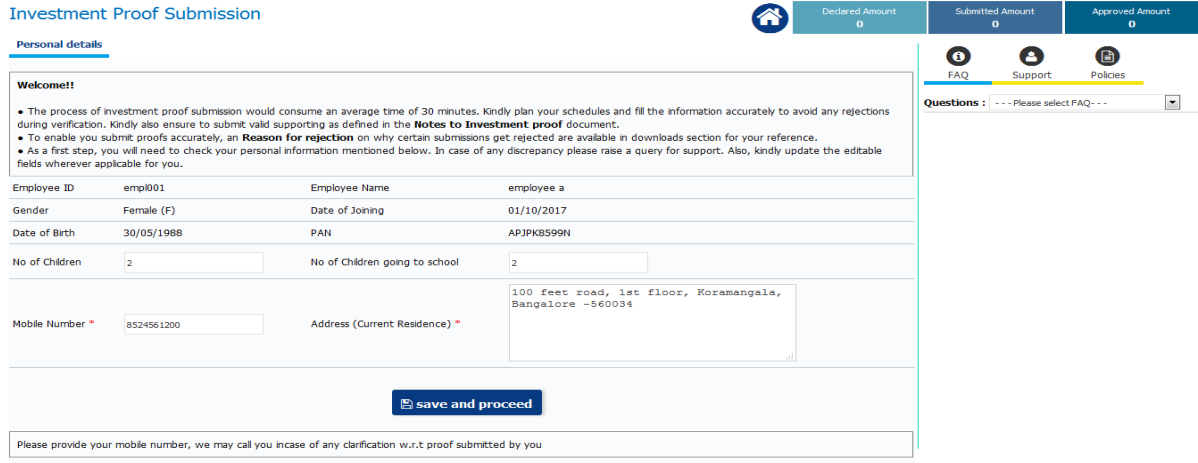
- In landing page employee views the following information.
 - General Guidelines
 - Proof Submission Status
 - Last date for proof submission
- Click “**Start**”, this will navigate you to “Personal Details” tab as shown below.

Personal Details Page

- Basic employee details such as Employee ID, Employee Name, Gender, DOJ, DOB, and PAN (non-editable fields) are picked directly from AscentHR payroll records.
- Other specific details (Children details like No. of children, No. of children going to school, current residence address, mobile Number), are required to be filled.

Employee Adds Personal Details

- Type **No of Children**, **No of Children going to school**, **Mobile Number & Address (Current Residence)** details in respective fields as displayed in the below screenshot.



Investment Proof Submission

Personal details

Welcome!

- The process of investment proof submission would consume an average time of 30 minutes. Kindly plan your schedules and fill the information accurately to avoid any rejections during verification. Kindly also ensure to submit valid supporting as defined in the **Notes to Investment proof** document.
- To enable you submit proofs accurately, an **Reason for rejection** on why certain submissions get rejected are available in downloads section for your reference.
- As a first step, you will need to check your personal information mentioned below. In case of any discrepancy please raise a query for support. Also, kindly update the editable fields wherever applicable for you.

Employee ID	empl001	Employee Name	employee a
Gender	Female (F)	Date of Joining	01/10/2017
Date of Birth	30/05/1988	PAN	APJPK8599N
No of Children	2	No of Children going to school	2
Mobile Number *	8524561200	Address (Current Residence) *	100 feet road, 1st floor, Koramangala, Bangalore -560034

save and proceed

Please provide your mobile number, we may call you in case of any clarification w.r.t proof submitted by you

Figure 3: Personal Details

- Once details are filled click **save and proceed**, an alert window popup as shown in the below screenshot.

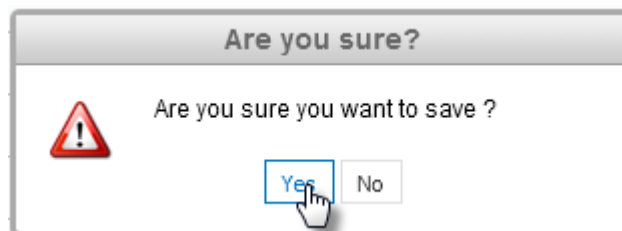


Figure 4: Alert Window

- Click **"Yes"** to save the personal details & navigate to Dependent Details section.



Note:

- ✓ Post submission of personal details, the following section & tabs are enabled.
 - Previous Employment
 - HRA
 - Housing Loan
 - Other Income
 - Deduction under Sec 80C to 80CCG
 - Deduction under Chapter VI A

Dependent Details

- Update complete dependent details as shown below. This will cover all the dependents like “Father, Mother, Spouse, Children.”



Note:

- ✓ The dependent details provided here becomes basis for consideration of any investments made for Parents/Spouse/Children. If the details are not provided you will not be able to claim exemption against the same.

Investment Proof Submission

[Personal details](#)
[Previous employment](#)
[HRA](#)
[Housing loan](#)
[Other Income \(Bank Interest, etc.\)](#)
[Ded. Under Sec 80C to 80CCG](#)
[Ded. Under Chapter VI A](#)

Declared Amount
0

Submitted Amount
0

Approved Amount
0

FAQ

Support

Policies

Questions : --- Please select FAQ ---

Welcome!!

- The process of investment proof submission would consume an average time of 30 minutes. Kindly plan your schedules and fill the information accurately to avoid any rejections during verification. Kindly also ensure to submit valid supporting as defined in the **Notes to Investment proof** document.
- To enable you submit proofs accurately, an **Reason for rejection** on why certain submissions get rejected are available in downloads section for your reference.
- As a first step, you will need to check your personal information mentioned below. In case of any discrepancy please raise a query for support. Also, kindly update the editable fields wherever applicable for you.

Employee ID	empl001	Employee Name	employee a
Gender	Female (F)	Date of Joining	01/10/2017
Date of Birth	30/05/1988	PAN	APJPK8599N
No of Children	2	No of Children going to school	2
Mobile Number *	8524561200	Address (Current Residence) *	100 feet road, 1st floor, Koramangala, Bangalore -560034

Family Details

Name*	Date of birth*	Gender*	Relationship*	Disability %*	School going*	Stay in hostel*	Age*	
Hari	02/01/1958	Male	Father		- Select -	- Select -	59	+
		- select -	- select -		- Select -	- Select -		+

save and proceed


Please provide your mobile number, we may call you in case of any clarification w.r.t proof submitted by you

Click here to add additional rows

Click here to delete the additional rows


Figure 5: Employee clicks Add

- Type dependent **Name** in the textbox provided.
- Select **Date of Birth** of dependent from date picker.
- Select **Gender** from dropdown options such as: Male or Female or Others.
- Select **Relationship** from dropdown options such as: Father or Mother or Spouse, Daughter or Son.
- Type **Disability %** in the textbox provided.
- Select “Yes” or “No” for **School going** for children.

- Select “Yes” or “No” for **Stay in hostel** for children.
- Click  ‘Add’ as highlighted in the above screenshot to add additional rows & update dependent details.
- Click **save and proceed** to add dependent details successfully.



Note:

- ✓ Follow same procedure to add all dependents details.
- ✓ Click  icon to delete the corresponding dependent details if incase the details are updated incorrectly.
- ✓ To view full details of dependent click on “**Dependent Name**”.

Family Details							
Name*	Date of birth*	Gender*	Relationship*	Disability %*	School going*	Stay in hostel*	Age* +
Hari	02/01/1958	Male	Father	0	No	No	59
<div style="display: flex; justify-content: space-between;"> <div> <p>Click Name link to view complete dependent details</p> </div> <div> <p>Click here to delete the added dependent details</p> </div> </div>							

save and proceed

Figure 6: Employee views & deletes dependent details

Dependent Details

Name *

Date of birth *

Gender *

Relationship *

Disability % *


School going *

Stay in hostel *

Age *

save

Figure 7: Employee views dependent details

- ✓ Employee is able to edit/update dependent details & click 'Save' to save the changes.
- ✓ Click  icon to close the pop up window.
- ✓ Click **save and proceed** to add dependent details successfully & employee will be navigated to the Previous Employment section.

Previous Employment



Note:

- ✓ The option to declare previous employment income will be displayed only if you have joined the Company after 1st April 2017.
- ✓ Ex: Consider an employee has joined in a new company ABC on 1st October, 2017 then he/she has to update previous employment income for the period of 1st April 2017 – 30th September, 2017 under previous employment income section.
- ✓ In case an employee has joined before 1st April 2017, he / she will be directed to the HRA section.

Investment Proof Submission

Personal details **Previous employment** HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Note:

1. As per the records, you Date of Joining is post 1st April of current Financial Year, hence there is a need to declare your previous employment salary details earned from 1st April 2017 till your Date of leaving. This may not be applicable to you in case this is your first employment. It is essential to update your Previous Employment Income details to ensure that the accurate amount of Net Taxable Income and applicable Income Tax thereon for the entire financial year are captured and accurate taxes are deducted by your current employer. Non submission of such information though may lead lower tax deduction with your current employer BUT will lead to higher tax deduction with interest & penalty while filing your tax return. The benefit to declare your previous employer income with your current employer is to avoid tax due liability at the end of the Financial Year while filing your Income Tax returns.

2. Please update the Previous Employment Income after exemptions Under Section 10 & 17 (i.e., HRA, Medical, LTA, Conveyance Exemptions) under "Income received from previous employer salary".

Declared Amount 0 Submitted Amount 0 Approved Amount 0

Attachments Support

0 out of 0 are uploaded. 0 are pending

Document List

Document for


Previous employment	Declared	Amount
Income received from previous employer salary		70000
Professional Tax recovered by previous employer		1400
Provident Fund contributed with Previous employer		9000
Tax paid outside salary / Tax recovered by previous employer		0

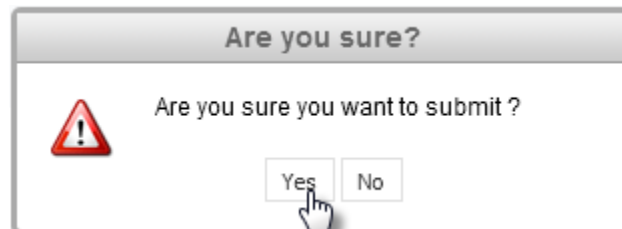
Next

Save

Document required as Proof: Form 16 / Tax Computation / Income Certificate & Form 12 B.
Proof required in Original / Photocopy: Photocopy
Coverage:
Remarks: If you have any salary income from previous employer during the current financial year, you may disclose the same in Form 12B and should be supported by Form 16/Income tax certificate.

Figure 8: Previous Employment Income

- Employee has to fill the Previous Employment Income form if he/she has joined after 1st Apr 2017.
- Update mandatory details in respective fields as displayed in the above screenshot.
- Click  icon, for help which provides basic instructions towards respective line item as displayed in the above screenshot.
- Click on **Save**, an alert window popup as shown in the below screenshot.



- Click “**Yes**” to save the previous employment income details successfully & to be navigated to the “House Rent Receipt Submission (HRA)” page.

House Rent Receipt Submission (HRA)



Note:

- ✓ Effective **1st April 2017**, the Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than **INR 8,333** per month/ **INR 100,000** per annum, in the absence of the above, we are afraid to inform you that HRA exemption may not be extended.

Investment Proof Submission



Declared Amount
0

Submitted Amount
80400

Approved Amount
0

Personal details Previous employment **HRA** Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Note :

1. Effective **1st April 2017**, the Income Tax Department insists the employees to provide Landlord's Name, PAN number & Address details in addition to Rent Receipts. It is mandatory to provide the above details if rent paid is more than **INR 8,333 per month/ INR 100,000 per annum**, in the absence of the above, we are afraid to inform you that HRA exemption may not be extended.

2. Metro Cities: Metro Cities as per Income Tax Act are **Delhi, Mumbai, Kolkata, Chennai**. If you are residing in places other than Metro cities, please select 'Others' in the City section. For employees working in **Noida, Gurgaon** region but living in **Delhi**, please select Delhi as your residence location.

3. You are required to update the rent details from your **joining month** onwards only. For HRA exemption prior to your date of joining, you will need to approach your previous employer.

4. Please use the Rent declaration format for **Jan 2018 / Feb 2018 / Mar 2018** which is available under **Downloads Menu** for future rent payable. Rent Receipt format is also available under **'Download'** section.

5. Please click on **"Copy to All"** after filling the rent details for the first month in case your rent details are same for the entire year.

Copy to All ☒

Months	Declared	Landlord Name	Landlord PAN	Landlord Address	Rented property Address	Rented property City	Rent per month
Apr-17						Select	0.00
May-17						Select	0.00
Jun-17						Select	0.00
Jul-17						Select	0.00
Aug-17						Select	0.00
Sep-17						Select	0.00
Oct-17		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000
Nov-17		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000
Dec-17		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000
Jan-18		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000
Feb-18		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000
Mar-18		Test	BYRPM8434N	Bangalore	Bangalore	Others	9000

Previous

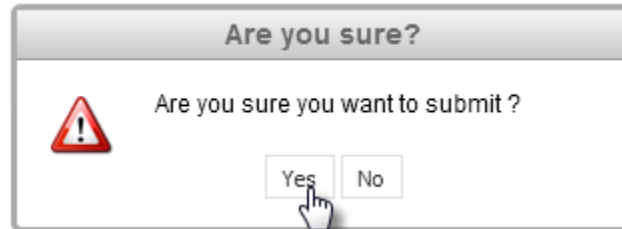
Save

Next

Document required as Proof: Rent Receipts for first 3 quarter i.e Apr to Dec / Declaration or original Rent receipt for last quarter i.e Jan to Mar
Proof required in Original / Photocopy: Declaration needs to be submitted
Remarks: If rent is paid by cheque then mention cheque number in the receipt. Receipt should clearly specify the name of the owner/address of the property.

Figure 9: House Rent Receipt (HRA)

- Type **Landlord Name**, **Landlord PAN**, **Landlord Address**, and **Rented Property Address** in respective textbox/fields as shown in the above screenshot.
- Select **Rented Property City** from dropdown options such as: Chennai or Kolkata or Mumbai or Delhi or Others.
- Type **Rent per Month** in textbox provided as shown in the above screenshot.
- Click **"Copy to All"** as shown in the above screenshot, after filling the rent details for the first month, in case the rent details are same for the entire year".
- Click **"Info icon"**, for **"Help"** which provides basic instructions towards respective line item.
- Click on **Save**, an alert window popup as shown in the below screenshot.



- Click “Yes” to save HRA details and to be navigated to Housing Loan section.

Housing Loan

- Under **House Loan** section employee can claim exemption under interest on housing loan (for Self-occupied property) & House Property Income or Loss (for let out property).

House Property Income or Loss (for let out property)

Investment Proof Submission

Personal details Previous employment HRA **Housing loan** Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Declared Amount: 0 Submitted Amount: 134400 Approved Amount: 0

Attachments: 0 out of 2 are uploaded, 2 are pending

Document List: Previous Employment Income: Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory. HRA (Rent paid) Documents

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

Note:

- Please use the Annexures “Click here to update” to enter all relevant details pertaining to House Property.
- As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is constructed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Let Out

Particulars (Let-out) Property: 1

Is the Property a Joint Property: select

What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes: 0

Lender type: select

Lender Name:

Lender PAN:

Lender Address:

Rent received type: select

1. Rent received (Please enter Rent received/ receivable for the entire year): 0

2. Less Municipal taxes actually paid - 2017-2018: 0

3. Net Annual Value (NAV) (1-2): 0

4. Less Standard Deduction (30% of NAV): 0

5. Interest repayment made in the current year: 0

6. Pre EMI paid if any in the current year other than regular interest repayment: 0

Do you declare any Pre EMI: select

Income / Loss from House Property: 0

Total Let Out Property: 0.00

Buttons: Save, Submit & Preview

Note:

- After the details are filled if the “Let Out Property Income/ Loss - (Sec 24(b))” is positive amount then this will be treated as income from House Property and if its Negative (-) treated as Loss from House Property.
- If house property is partially vacant and partially rented during the year, you will have to declare the actual rent received during the year.
- Please update the complete rent amount even in case of Joint Property and system will calculate the values on basis of Percentage mentioned under your contribution towards Repayment of Loan.
- Maximum exemption employee can avail 2lakh put together for both self and let out property

Previous Next

Figure 10: House property Income or Loss page – Let Out Property

- If the property is owned by one individual, please select “**NO**” against the line item “**Is the property a joint property**” as shown in the below screenshot.
- If the property is owned jointly, select “**YES**” against the line item “**Is the property a joint property**” as shown in the below screenshot.

Particulars	(Let-out) Property-I
Is the Property a Joint Property	: select ▼
What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes	: select Yes No

Figure 11: Property Type

- If the property is owned jointly then kindly provide the percentage of contribution towards loan repayment in below mentioned section.

What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if the above point is Yes	: 100
--	-------

Figure 12: Contribution Percentage

- Please select the **Lender Type** from the dropdown such as: **Financial Institution** or **Employer** or **others** as displayed in the below screenshot.
- Please update **Lender Name**, **Lender PAN**, and **Lender Address** in respective textbox as displayed below.

Lender type	: - select - ▼
Lender Name	: - select - Financial Institution Employer Others
Lender PAN	:
Lender Address	:

Figure 13: Lender details

- Please select the **Rent received type** from dropdown options such as: Deemed, Rented.

Rent received type	: - select -
1. Rent received (Please enter Rent received/ receivable for the entire year)	: - select - deemed rented

Figure 14: Rent Received type

- If you have selected **Rented**, please update the month wise rent value in textbox as displayed below.
- Click **“Copy to All”** after filling the rent details for the first month in case the rent details are same for the entire year.

Month wise rent received for property 1				Copy to all <input checked="" type="checkbox"/>
Rent Apr 2017 :	Rent May 2017 :	Rent Jun 2017 :	Rent Jul 2017 :	
10000	10000	10000	10000	
Rent Aug 2017 :	Rent Sep 2017 :	Rent Oct 2017 :	Rent Nov 2017 :	
10000	10000	10000	10000	
Rent Dec 2017 :	Rent Jan 2018 :	Rent Feb 2018 :	Rent Mar 2018 :	
10000	10000	10000	10000	

Figure 15: Month wise Rent details

- **Rent received** value will be auto populated based on the data provided under **“Month wise rent received for property-1”** section.
- Update the value of municipal tax paid in **“Less Municipal taxes actually paid-2017-2018”** textbox as displayed below.

1. Rent received (Please enter Rent received/ receivable for the entire year)	: 120000
2. Less Municipal taxes actually paid - 2017-2018	: 10000
3. Net Annual Value(NAV) (1-2)	: 110000
4. Less Standard Deduction (30% of NAV)	: 33000

Figure 16: Municipal Tax

- Once the value of municipal tax paid is entered, **Net Annual Value (NAV) (1-2)** will auto populate.

- “**Less Standard Deduction (30% of NAV)**” will be calculated automatically as displayed above.
- Update the interest paid for the current year under “**Interest repayment made in the current year**” line item textbox and if you have paid any Pre EMI, update the value in the line item “ **Pre EMI if any in the current year other than regular interest repayment**” textbox as displayed in the below screenshot.
- Select “Yes” for “**Do you declare any Pre EMI**” if you have paid any Pre EMI other than regular interest payment or select “No” as displayed in the below screenshot.

5. Interest repayment made in the current year	:	40000
6. Pre EMI paid if any in the current year other than regular interest repayment	:	4000
Do you declare any Pre EMI	:	yes
7. Pre EMI : Year 1 (Only 20% of your PRE-EMI will be considered)	:	- select -
8. Pre EMI : Year 2 (Only 20% of your PRE-EMI will be considered)	:	0
9. Pre EMI : Year 3 (Only 20% of your PRE-EMI will be considered)	:	0
10. Pre EMI : Year 4 (Only 20% of your PRE-EMI will be considered)	:	0
11. Pre EMI : Year 5 (Only 20% of your PRE-EMI will be considered)	:	0
Income / Loss from House Property	:	33000
		Total Let Out Property: 33000.00
<div> <div>Save</div> <div>Submit & Preview</div> </div>		

Figure 17: Pre –EMI

- The total let out property value will be auto populated once all the details are filled as displayed in the above screenshot.
- If the property is owned jointly, kind provide the details of co-owner in below mentioned section

Declaration for claiming benefits on Joint Property

This is to inform the concerned authorities that the property mentioned is a joint property, however the other owner of the property is not enjoying any tax benefits on the same and has granted me permission to avail the tax benefits of the same.

Let Property-I

Name of the Joint Owner	:	<input type="text"/>
PAN No of the Joint Owner	:	<input type="text"/>
Relationship with Joint Owner	:	<input type="text"/>

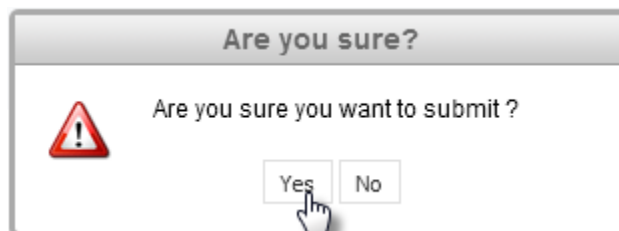
Figure 18: Joint property declaration

Note:

Note :

1. After the details are filled if the "Let Out Property Income/ Loss - (Sec 24(b))" is positive amount then this will be treated as income from House Property and if its Negative (-) treated as Loss from House Property.
2. If house property is partially vacant and partially rented during the year, you will have to declare the actual rent received during the year.
3. Please update the complete rent amount even in case of Joint Property and system will calculate the values on basis of Percentage mentioned under your contribution towards Repayment of Loan
4. Maximum exemption employee can avail 2lakh put together for both self and let out property

- Once required details are updated click on **Save**, an alert window popup as shown in the below screenshot.



- Click **"yes"** to save House Property Income/Loss – Let out Property details successfully and to be navigated to **Interest on Housing Loan – self Occupied Property section** as shown in the below screenshot.

- Below is the screenshot for updating the “Interest on Housing Loan-Self Occupied Property (Sec 24(b))”.

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Declared Amount 0 Submitted Amount 167400 Approved Amount 0

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

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

Note :

- Please use the Annexures “Click here to update” to enter all relevant details pertaining to House Property.
- As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / considered that the construction of the property is constructed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Self Occupied

- Are you Paying Interest on Housing Loan which is Self - Occupied : Yes
- Is the Property a Joint Property : Yes
- What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes : 0
- Loan Sanctioned year : 2016
- Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2018) : 01 2016
- Lender type : - select -
- Lender Name :
- Lender PAN :
- Lender Address :
- Interest repayment made in the current year : 0
- Pre EMI paid if any in the current year other than regular interest repayment : 0
- Do you have any Pre EMI : - select -
- Do you wish to submit the HRA details ? :

Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999
If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-
Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-

Total: 0

Save Submit & Preview

Previous Next

Attachments Support

0 out of 3 are uploaded. 3 are pending

Document List

Document for

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 19: Interest on Housing Loan self-occupied

- Please Select “Yes” from dropdown if you are paying interest on Self-Occupied property.
- Select “No” from dropdown if you are not paying any interest on Self-Occupied property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Self Occupied

- Are you Paying Interest on Housing Loan which is Self - Occupied : Yes
- Is the Property a Joint Property : Yes

Figure 20: Self-occupied property

- If you selected “No”, the following fields become non- editable as displayed in the below screenshot. So you can skip those fields (Point No.2, 3, 4, 5).

2. Is the Property a Joint Property	: Yes	<input type="button" value="v"/>
3. What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes	: 0	<input type="text"/>
4. Loan Sanctioned year	: 2016	<input type="button" value="v"/>
5. Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2018)	: 01	2016 <input type="button" value="v"/>

Figure 21: Self-occupied property

- If you selected “Yes” for above field (Are You Paying interest on Housing Loan is Self-occupied) the following fields are enabled as displayed in the below.

2. Is the Property a Joint Property	: Yes	<input type="button" value="v"/>
3. What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes	: 0	<input type="text"/>
4. Loan Sanctioned year	: 2016	<input type="button" value="v"/>
5. Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2018)	: 01	2016 <input type="button" value="v"/>

Figure 22: Self-occupied property

- Please select “yes” if property is owned jointly and update the **percentage of contribution** towards loan repayment under point no.3.
- Select “No” if property owned by one individual and you can skip the point no.3.

3. What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes	: 70	<input type="text"/>
4. Loan Sanctioned year	: 2013	<input type="button" value="v"/>
5. Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2018)	: 01	2016 <input type="button" value="v"/>

Figure 23: Self-occupied property

- Select the appropriate month & year from the dropdown under the line item “**Loan sanctioned Year & Month and Year of completion of construction of the property/**

Possession of House Property (Cannot be more than March - 2018)” as shown above screenshot.

- Please select “**Lender Type**” from the dropdown such as: Financial Institution or Employer or others as displayed in the below screenshot.
- Please update the **Lender Name, Lender PAN, and Lender Address** in the respective textbox as displayed below.

6. Lender type	:	- select -
7. Lender Name	:	- select - Financial Institution Employer Others
8. Lender PAN	:	
9. Lender Address	:	

Figure 24: Lender Type & Details

- Update the interest paid for the current year under the line item “**Interest repayment made in the current year**” and if you have paid any Pre EMI, update the value under line item “**Pre EMI if any in the current year other than regular interest repayment**” as displayed in the below screenshot.

10. Interest repayment made in the current year	:	40000
11. Pre EMI paid if any in the current year other than regular interest repayment	:	4000
Do you have any Pre EMI	:	Yes
12. Pre EMI : Year 1; (Only 20% of your PRE-EMI will be considered)	:	0
13. Pre EMI : Year 2; (Only 20% of your PRE-EMI will be considered)	:	0
14. Pre EMI : Year 3; (Only 20% of your PRE-EMI will be considered)	:	0
15. Pre EMI : Year 4; (Only 20% of your PRE-EMI will be considered)	:	0
16. Pre EMI : Year 5; (Only 20% of your PRE-EMI will be considered)	:	0

Figure 25: Pre EMI Details

- Please Select **“Yes”** from dropdown if you wish to submit both the Interest on Housing loan self-occupied property and HRA details.
- Please Select **“No”** from dropdown if you wish to declare only Interest on Housing loan self-occupied property and not the HRA

17. Do you wish to submit the HRA details ?	<div><div></div><div>Yes</div><div>No</div></div>
Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999	
If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-	
Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-	
Total:	30800.00

Figure 26: HRA and Housing loan



Note:

- ✓ For claiming exemption towards Interest on Housing Loan for Self-Occupied property, consist of two scenarios.

1st Scenario:

- Where only interest on Housing loan for self-occupied property has been claimed and not the HRA exemption.
- In such instance, update the details under point No.17 – **“Do you wish to submit the HRA details?”** as **“NO”** and then click on Save.

Investment Proof Submission

[Personal details](#)
[Previous employment](#)
[HRA](#)
[Housing loan](#)
[Other Income \(Bank Interest, etc.\)](#)
[Ded. Under Sec 80C to 80CCG](#)
[Ded. Under Chapter VI A](#)

Declared Amount
0

Submitted Amount
167400

Approved Amount
0

Show only declared items ☐

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

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

Note :

- Please use the Annexures **"Click here to update"** to enter all relevant details pertaining to House Property.
- As per the Income Tax Department vide Circular No.17/2014, employee need to submit either Electricity Bill or Water Bill or Property Ownership Certificate for claiming Home loan benefit under Self Occupied/Let-out house property. This proof is basically to understand / consider that the construction of the property is constructed and people are residing in that property.

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Self Occupied

- Are you Paying Interest on Housing Loan which is Self - Occupied : Yes ☐
- Is the Property a Joint Property : Yes ☐
- What is the Percentage of Your contribution towards Repayment of Loan. Applicable only if Point 2 is Yes : 70
- Loan Sanctioned year : 2013
- Month and Year of completion of construction of the Property/Possession of House Property (Cannot be later than March - 2016) : 01 2016
- Lender type : Others
- Lender Name : Test
- Lender PAN : BYRPM8521L
- Lender Address : Test
- Interest repayment made in the current year : 40000
- Pre EMI paid if any in the current year other than regular interest repayment : 4000
Do you have any Pre EMI : Yes ☐
- Pre EMI : Year 1; (Only 20% of your PRE-EMI will be considered) : 0
- Pre EMI : Year 2; (Only 20% of your PRE-EMI will be considered) : 0
- Pre EMI : Year 3; (Only 20% of your PRE-EMI will be considered) : 0
- Pre EMI : Year 4; (Only 20% of your PRE-EMI will be considered) : 0
- Pre EMI : Year 5; (Only 20% of your PRE-EMI will be considered) : 0
- Do you wish to submit the HRA details ? : No ☐

Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999.
If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-
Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-
Total: 30800.00

Declaration for claiming benefits on Joint Property

This is to inform the concerned authorities that the property mentioned is a joint property, however the other owner of the property is not enjoying any tax benefits on the same and has granted me permission to avail the tax benefits of the same.

Self Occupied

Name of the Joint Owner : Test

PAN No of the Joint Owner : BYRPM8529L

Relationship with Joint Owner : Father

[Save](#) [Submit & Preview](#)

[Previous](#) [Next](#)

Attachments

0 out of 3 are uploaded. 3 are pending

Document List

Document for

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 27: Housing Loan self-occupied

2nd Scenario:

- Where both interest on Housing loan for self-occupied property has been claimed along with HRA exemption.
- In such instance, update the details under point No.17 – “Do you wish to submit the HRA details?” as “YES” and then click on Save.

15.Pre EMI : Year 4; (Only 20% of your PRE-EMI will be considered)	: 0
16.Pre EMI : Year 5; (Only 20% of your PRE-EMI will be considered)	: 0
17.Do you wish to submit the HRA details ?	: Yes <input type="button" value="v"/>
<p>Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999</p> <p>If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-</p> <p>Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-</p> <p>Total: 30800.00</p>	
HRA Declaration	
You are claiming HRA exemption and interest on Housing loan exemption also, hence you have to fill the below declaration	
I own a House property which has not been let out nor any benefit has been derived from the same and is located at :	
1.	<input type="text"/>
I have taken a house property for rent at :	
2.	<input type="text"/>
3.I am not residing in Own House and I am claiming HRA due to	
Category 1: Construction of the Property has been completed during current financial year or Construction of the Property will be completed before March 2018. : Yes <input type="button" value="v"/>	
Category 2: Own House is in a different City/Town : Yes <input type="button" value="v"/>	
Category 3: Own House though in the same city, could not be occupied due to reasons of employment : Yes <input type="button" value="v"/>	

Figure 28: Annexure Housing Loan self-occupied

- Once “Yes” has been updated towards point No. 17, below screen shot will appear.
Provide the declaration for claiming both the benefits.

16.Pre EMI : Year 5; (Only 20% of your PRE-EMI will be considered)	: 0
17.Do you wish to submit the HRA details ?	: Yes <input type="button" value="v"/>
<p>Maximum Exemption is limited to Rs. 2,00,000/- if construction of the property is completed on or after 01st Apr 1999</p> <p>If Acquisition or construction of the house before 01st Apr 1999 then maximum deduction allowable is Rs. 30,000/-</p> <p>Loan borrowed for Repair or renewal or reconstruction of the house - maximum deduction allowable is Rs. 30,000/-</p> <p>Total: 30800.00</p>	
HRA Declaration	
You are claiming HRA exemption and interest on Housing loan exemption also, hence you have to fill the below declaration	
I own a House property which has not been let out nor any benefit has been derived from the same and is located at :	
1.	<input type="text"/>
I have taken a house property for rent at :	
2.	<input type="text"/>
3.I am not residing in Own House and I am claiming HRA due to	
Category 1: Construction of the Property has been completed during current financial year or Construction of the Property will be completed before March 2018. : Yes <input type="button" value="v"/>	
Category 2: Own House is in a different City/Town : Yes <input type="button" value="v"/>	
Category 3: Own House though in the same city, could not be occupied due to reasons of employment : Yes <input type="button" value="v"/>	

Figure 29: HRA Declaration

- If the property is owned jointly kind provides the details of co-owner in below mentioned section.

Declaration for claiming benefits on Joint Property

This is to inform the concerned authorities that the property mentioned is a joint property, however the other owner of the property is not enjoying any tax benefits on the same and has granted me permission to avail the tax benefits of the same.

Self Occupied

Name of the Joint Owner	:	Test
PAN No of the Joint Owner	:	BYRPM8529L
Relationship with Joint Owner	:	Father

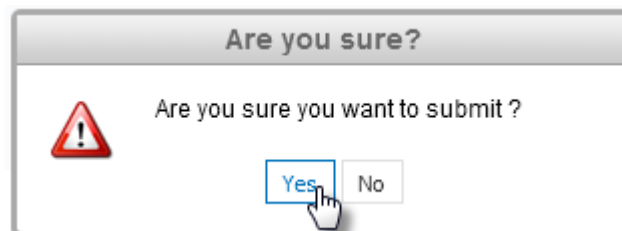
Save

Submit & Preview

Previous

Next

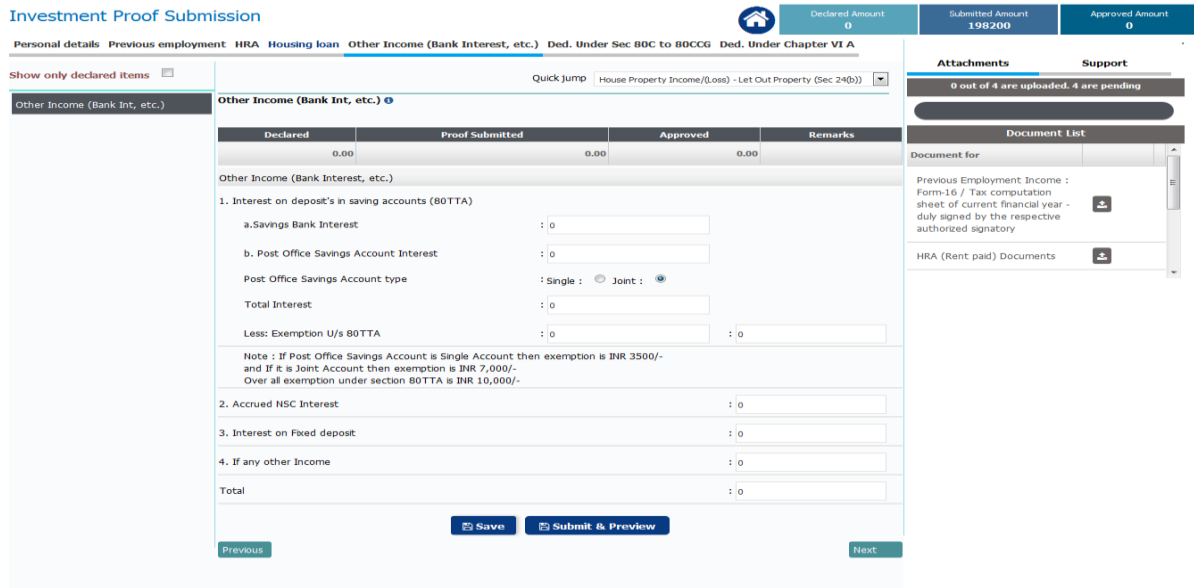
- Click **Save**, an alert window popup as shown in the below screenshot.



- Click “Yes” to save the details successfully & navigated to **Other Income (Bank Interest, etc.)** tab as shown in the below screenshot.

Other Income (Bank Interest, etc.)

- If there is any Other Income, which has to be consider for tax computation please update the details Under “**Other Income (Bank Interest, etc.)**” as shown in the below screen shot.



Investment Proof Submission

Personal details Previous employment HRA Housing loan **Other Income (Bank Interest, etc.)** Ded. Under Sec 80C to 80CCG Ded. Under Chapter VIA

Declared Amount: 0 Submitted Amount: 198200 Approved Amount: 0

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

Other Income (Bank Int, etc.)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Other Income (Bank Interest, etc.)

1. Interest on deposit's in saving accounts (80TTA)

a. Savings Bank Interest : 0

b. Post Office Savings Account Interest : 0

Post Office Savings Account type : Single Joint

Total Interest : 0

Less: Exemption U/s 80TTA : 0

Note : If Post Office Savings Account is Single Account then exemption is INR 3500/- and If it is Joint Account then exemption is INR 7,000/- Over all exemption under section 80TTA is INR 10,000/-

2. Accrued NSC Interest : 0

3. Interest on Fixed deposit : 0

4. If any other Income : 0

Total : 0

Buttons: Save, Submit & Preview, Previous, Next

Attachments 0 out of 4 are uploaded. 4 are pending

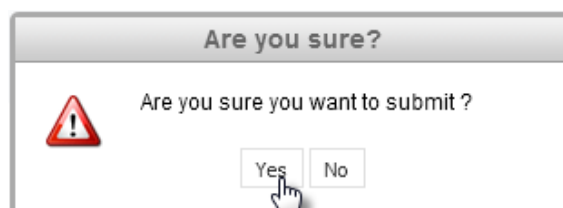
Document List

Document for: Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 30: Other Income details

- Employee declares following information in **Other Income (Bank Interest, etc.)** section.
 - Interest on deposits in saving accounts
 - Accrued NSC Interest
 - Interest on Fixed deposit
 - If any other Income
- Once details are filled click on **Save**, an alert window popup as shown in the below screenshot.



- Click “Yes” to save Other Incomes details and to be navigated to **Deduction under Sec 80C to 80CG** section.

Investments under Section 80C to 80CCG

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) **Ded. Under Sec 80C to 80CCG** Ded. Under Chapter VI A

Declared Amount: 0 Submitted Amount: 198200 Approved Amount: 0

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

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Deduction under Life Insurance Pension Scheme (Sec 80CCC) : 0.00

[Save](#) [Submit & Preview](#)

Note:
1.Photo Copy of premium receipt – Only current year receipt eligible(Ex: - LIC/UTI Pension Fund, ICICI PRU Forever Life/ Tata AIG Easy Retire Annuity Plan).

[Previous](#) [Next](#)

Attachments **Support**

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Document List

Document for

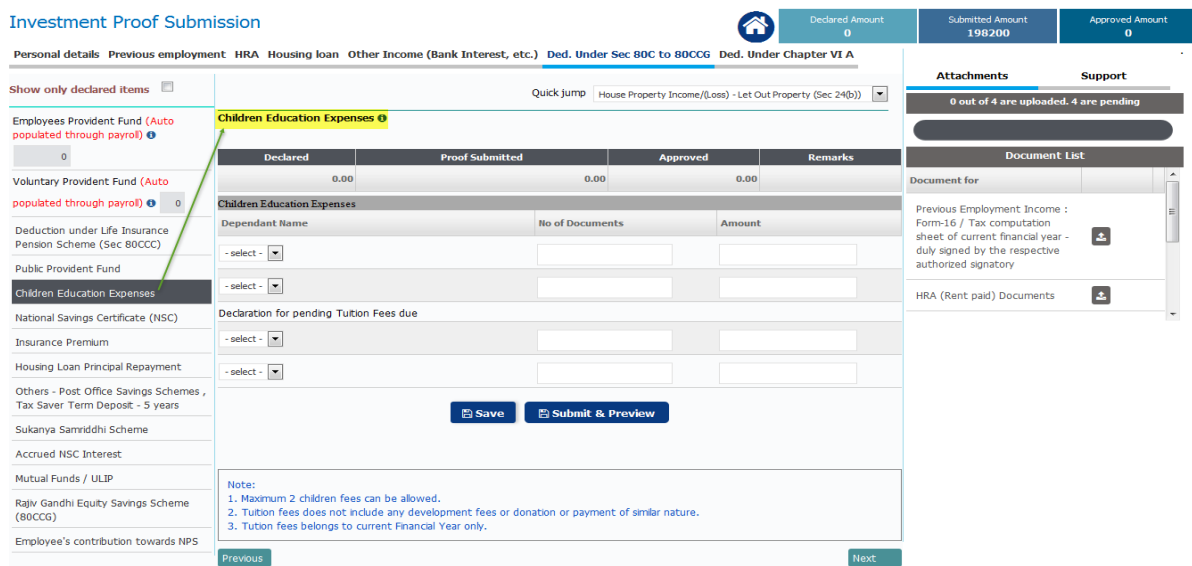
Previous Employment Income :
Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 31: Section 80C

- The **Employee’s Provident Fund & Voluntary Provident Fund** (If Applicable) will be populated as per AscentHR payroll records and exemption will be provided by default.
- The investments made during the year has to be updated in the respective line items wherever is applicable.
- Under **Deduction under Sec 80C to 80CCG** section, employee is able to declare the following.
 - Deduction under Life Insurance Pension Scheme
 - Public Provident Fund
 - Children Education Expense
 - National Savings Certificate (NSC)
 - Insurance Premium

- Housing Loan Principal Repayment
 - Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years
 - Sukanya Samriddhi Scheme
 - Accrued NSC Interest
 - Mutual Funds / ULIP
 - Rajiv Gandhi Equity Savings Scheme (80CCG)
 - Employee's contribution towards NPS
- Employee needs to go the respective section & fill in the details of investments made.
 - Under the Children Education Expenses, employees need to select the dependent name from the drop down list, update the number of documents & the amount. If any tuition fee is due, employee can update the same in the “Declaration for pending Tuition fees due” section as shown in the below screenshot.



The screenshot shows the 'Investment Proof Submission' form. The 'Children Education Expenses' section is highlighted. It includes a table for declaring expenses with columns for 'Declared', 'Proof Submitted', 'Approved', and 'Remarks'. Below this is a section for 'Children Education Expenses' with a table for 'Dependant Name', 'No of Documents', and 'Amount'. There is also a 'Declaration for pending Tuition Fees due' section with a table for 'Dependant Name', 'No of Documents', and 'Amount'. The form includes a 'Save' button and a 'Submit & Preview' button. A note at the bottom states: 'Note: 1. Maximum 2 children fees can be allowed. 2. Tuition fees does not include any development fees or donation or payment of similar nature. 3. Tuition fees belongs to current Financial Year only.'

Figure 32: Children Education Expense Declaration

- Under the Insurance Premium Section, employees need to select the dependent name from the drop down list, update the policy number, premium type, date, number of documents & the amount. If any Insurance premium is due, employee can update the same in the “Declaration for pending life insurance due” section as shown in the below screenshot.

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) **Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A**

Show only declared items ☐

Employees Provident Fund (Auto populated through payroll) 0

Voluntary Provident Fund (Auto populated through payroll) 0

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Public Provident Fund

Children Education Expenses

National Savings Certificate (NSC)

Insurance Premium

Housing Loan Principal Repayment

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

Sukanya Samridhi Scheme

Accrued NSC Interest

Mutual Funds / ULIP

Rajiv Gandhi Equity Savings Scheme (80CCG)

Employee's contribution towards NPS

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

Declared	Proof Submitted	Approved	Remarks
0.00		0.00	0.00

Life Insurance Premium

Dependent Name	Policy Number	Premium Type	Relationship	Date	No. of Documents	Amount
-select-		Quarterly	-select-			

Declaration for pending Life Insurance due

Dependent Name	Policy Number	Premium Type	Relationship	Date	No. of Documents	Amount
-select-		Quarterly	-select-			

Note:

1. Life Insurance Premium paid towards dependents other than Spouse, Children cannot be considered for exemption. As per the provisions of Section 80C of the Income Tax Act 1961
2. Late fees cannot be considered
3. Declarations for premium due prior to Jan 2018 will not be considered
4. Deduction will be allowed only for premiums upto a maximum of 10% of the sum assured for policy issued on or after April 1, 2012. In case of policy issued before March 31, 2012, deduction will be allowed only for premiums upto a maximum of 20% of the sum assured.

[Save](#) [Submit & Preview](#)

[Previous](#) [Next](#)

Attachments **Support**

0 out of 4 are uploaded. 4 are pending

Document List

Document for

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 33: Insurance Premium declaration

- Under the Mutual Funds / ULIP Section, employees need to update the name, date & amount of investment. If any SIP is due, employee can update the same in the “Declaration for pending SIP due” section as shown in the below screenshot.

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) **Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A**

Show only declared items ☐

Employees Provident Fund (Auto populated through payroll) 0

Voluntary Provident Fund (Auto populated through payroll) 0

Deduction under Life Insurance Pension Scheme (Sec 80CCC)

Public Provident Fund

Children Education Expenses

National Savings Certificate (NSC)

Insurance Premium

Housing Loan Principal Repayment

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

Sukanya Samridhi Scheme

Accrued NSC Interest

Mutual Funds / ULIP

Rajiv Gandhi Equity Savings Scheme (80CCG)

Employee's contribution towards NPS

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

Declared	Proof Submitted	Approved	Remarks
0.00		0.00	0.00

Mutual Funds Form

Name of Investment	Date of Investment	Amount Invested

Declaration for pending SIP due

Name of Investment	Date of Investment	Amount Invested

Note:

1. Only tax free Mutual Funds will be exempted.
2. Declarations prior to Jan 2018 will not be considered.
3. The Mutual Funds - Declaration available under this section needs to be used only by those employees who have invested in Mutual Funds through a Systematic investment plan (SIP). Employees have to submit the proof of payments made through SIP till Dec / Jan if the declaration (pertaining to pending payments of Jan/Feb/March) needs to be considered for tax computation.
4. If proof of payments through SIP till Dec / Jan are not enclosed the declaration will be nullified.

[Save](#) [Submit & Preview](#)

[Previous](#) [Next](#)

Attachments **Support**

0 out of 4 are uploaded. 4 are pending

Document List

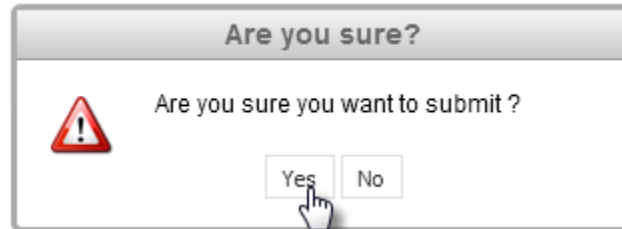
Document for

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 34: Mutual Funds / ULIP

- Once all the details are filled click on **Save**, an alert window popup as shown in the below screenshot.



- Click “Yes” to save **Deduction under 80C to 80CCG** details and to be navigated to **Other Deduction under Chapter VI A**.

Other Permitted Exemptions (Section 80D to 80U)

- Under **Deduction under Chapter VI A** section, employee is able to declare the following.
 - Medical Insurance Premium (Sec 80D)
 - Medical Insurance Premium for parents (sec 80D)
 - Medical Insurance Premium paid for senior Citizen (Parents)
 - Medical for Handicapped Dependents (Sec 80DD)
 - Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
 - Medical for Specified Diseases (Sec 80DDB)
 - Medical for Specified Diseases for Senior Citizen (Sec 80DDB)
 - Interest Paid on Higher Education Loan (Sec 80E)
 - Deduction for Permanent Disability (Sec 80U)
 - Interest on House Property - Additional Exemption
- Employee needs to go the respective section as shown in the below screenshot & fill in the required details.

Investment Proof Submission

[Personal details](#)
[Previous employment](#)
[HRA](#)
[Housing loan](#)
[Other Income \(Bank Interest, etc.\)](#)
[Ded. Under Sec 80C to 80CCG](#)
[Ded. Under Chapter VI A](#)

Declared Amount
0

Submitted Amount
198200

Approved Amount
0

☐ Show only declared items

- Medical Insurance Premium (Sec 80D)
- Medical Insurance Premium for parents (Sec 80D)
- Medical Insurance Premium paid for senior Citizen (Parents)
- Medical for Handicapped Dependents (Sec 80DD)
- Medical for Handicapped Dependents (severe disability) (Sec 80 DD)
- Medical for Specified Diseases (Sec 80DDb)
- Medical for Specified Diseases for Senior Citizen (Sec 80DDb)
- Interest Paid on Higher Education Loan (Sec 80E)
- Deduction for Permanent Disability (Sec 80U)

Quick jump

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

Medical Insurance Premium (Sec 80D)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical Insurance Premium (Sec 80D) : 0.00

Save
Submit & Preview

Note:

1. Photocopy of premium paid receipt which in current FY.

2. Maximum Premium amount allowed for deduction from taxable income U/s 80D is Rs 25,000 for Self / Spouse / Children.

3. Deduction is eligible only if premium paid through any mode other than cash.

4. Premiums paid as deductions through payroll will be eligible without submission of receipts.

Previous
Next

Attachments

0 out of 4 are uploaded. 4 are pending

Document List

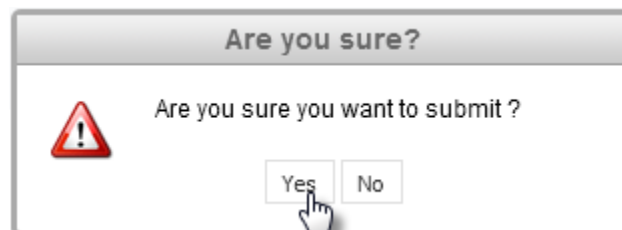
Document for

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

HRA (Rent paid) Documents

Figure 35: Medical Insurance Premium Declaration

- Once details are filled in each section click on **Save**, an alert window popup as shown in the below screenshot.



- Click **"Yes"** to save the details of current section and to be navigated to other section.

Once the investments made during the financial year are updated, please upload the supporting proofs.

To upload the proofs

- Under **Attachments** section employee is able to view **Documents List** for which proofs need to be uploaded as shown in the below screenshot.

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Declared Amount 0 Submitted Amount 198200 Approved Amount 0

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

Deduction for Permanent Disability (Sec 80U)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Deduction for Permanent Disability (Sec 80U) : 0.00

[Save](#) [Submit & Preview](#)

Note:

1. Full amount of Interest paid during the financial year will be eligible.
2. A deduction of Rs. 75,000/- will be eligible. In case of severe disability (Disability over 80%) Rs 125,000/- will be allowed.
3. Certificate issued by a medical authority (who is a physician, a surgeon, an oculist or a psychiatrist) which is valid for FY 2017-18 in the Form 10-1A. If the certificate is not valid for FY 2017-18, the exemption will not be given.

[Previous](#) [Next](#)

Attachments **Support**

0 out of 4 are uploaded. 4 are pending

Document List

- House Property Income/(Loss) - Let Out (Possession Certificate, Loan Certificate & Municipal Tax) [Upload Document](#)
- Interest on Housing Loan Occupied - Loan Certificate and Possession certificate
- Interest on House Property

Supporting documents to be uploaded

House Property Income/(Loss) - Let Out Document (Possession Certificate, Loan Certificate & Municipal Tax)

Select File [Browse...](#) No file selected. [2](#)

File Password [Upload](#) [3](#)

Maximum file size is 2 MB. Allowed File types are : jpg, jpeg, pdf, doc, docx, zip

Figure 36: Employee uploads attachment

- Click **“Upload Document”** option corresponding to the document.
- Attach the corresponding documents by clicking **Browse**.
- Please provide the password in **“File Password”** textbox, if the document which you are uploading is password protected and then click **“Upload”** to upload the file successfully.
- Once the proof is uploaded, the respective line item will appear with **download & delete** option as shown in the below screenshot.

Investment Proof Submission

Personal details Previous employment HRA Housing loan Other Income (Bank Interest, etc.) Ded. Under Sec 80C to 80CCG Ded. Under Chapter VI A

Declared Amount 0 Submitted Amount 243200 Approved Amount 0

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

Medical Insurance Premium (Sec 80D)

Declared	Proof Submitted	Approved	Remarks
0.00	0.00	0.00	

Medical Insurance Premium (Sec 80D) : 0.00

[Save](#) [Submit & Preview](#)

Note:

1. Photocopy of premium paid receipt which in current FY.
2. Maximum Premium amount allowed for deduction from taxable income U/s 80D is Rs 25,000 for Self / Spouse / Children.
3. Deduction is eligible only if premium paid through any mode other than cash.
4. Premiums paid as deductions through payroll will be eligible without submission of receipts.

[Previous](#) [Next](#)

Attachments **Support**

1 out of 5 are uploaded. 4 are pending

Document List

- Possession Certificate
- Interest on House Property (Sec 80EE) - additional benefit of INR 50,000/- [Click here to delete the attachment](#)
- House Property Income/(Loss) - Let Out (Possession Certificate, Loan Certificate & Municipal Tax) [Click here to download attachment](#)

Supporting documents to be uploaded

Previous Employment Income : Form-16 / Tax computation sheet of current financial year - duly signed by the respective authorized signatory

Select File [Browse...](#) No file selected. [2](#)

File Password [Upload](#) [3](#)

Maximum file size is 2 MB. Allowed File types are : jpg, jpeg, pdf, doc, docx, zip

Figure 37: Attachment tab



Note:

- ✓ The Attachment file type must be in following types:

doc/ docx/ pdf/ jpg/ jpeg/ zip

- ✓ The Maximum File Size is 2MB

Form 12 BB

- Once all details are filled and attachments are uploaded click on **“Submit & Preview”** to preview the **Investment Proof Submission form** as shown in the below screenshot.

Investment Proof Submission

[Back](#)

5 out of 5 are uploaded. 0 are pending

Component	Submitted	Approved
Previous Employment Income		
Income received from previous employer salary	70000.00	0
Professional Tax recovered by previous employer	1400.00	0
Provident Fund contributed with Previous employer	9000.00	0
Tax paid outside salary / Tax recovered by previous employer	0.00	0
House Rent Receipt Submission (HRA)		
Rent Paid Apr-17	0.00	0
Rent Paid May-17	0.00	0
Rent Paid Jun-17	0.00	0
Rent Paid Jul-17	0.00	0
Rent Paid Aug-17	0.00	0
Rent Paid Sep-17	0.00	0
Rent Paid Oct-17	9000.00	0
Rent Paid Nov-17	9000.00	0
Rent Paid Dec-17	9000.00	0
Rent Paid Jan-18	9000.00	0
Rent Paid Feb-18	9000.00	0
Rent Paid Mar-18	9000.00	0
Housing Loan/House Property/Other Income		
House Property Income/(Loss) - Let Out Property (Sec 24(b))	33000.00	0
Interest on Housing Loan-Self Occupied Property (Sec 24(b))	30800.00	0
Other Income (Bank Int, etc.)	0.00	0
Total Investments U/s 80C & 80CCC limited up to Rs.1.5 Lakhs + Rs.50000 for additional NPS + Rs.25000 for 80CCG		
Employees Provident Fund (Auto populated through payroll)	0.00	0
Voluntary Provident Fund (Auto populated through payroll)	0.00	0
Deduction under Life Insurance Pension Scheme (Sec 80CCC)	0.00	0
Public Provident Fund	0.00	0
Children Education Expenses	0.00	0
National Savings Certificate (NSC)	0.00	0
Insurance Premium	0.00	0
Housing Loan Principal Repayment	0.00	0
Others - Post Office Savings Schemes , Tax Saver Term Deposit - 5 years	0.00	0
Sukanya Samridhi Scheme	0.00	0
Accrued NSC Interest	0.00	0
Mutual Funds / ULIP	0.00	0
Rajiv Gandhi Equity Savings Scheme (80CCG)	0.00	0
Employee's contribution towards NPS	0.00	0
Other Permitted Exemptions (Section 80D to 80U)		
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)	45000.00	0

Document List

Document for		
Previous Employment Income : Form-16/ Tax computation sheet of current financial year - duly signed by the respective authorized signatory		
HRA (Rent paid) Documents		
House Property Income/(Loss) - Let Out (Possession Certificate, Loan Certificate & Municipal Tax)		
Interest on Housing Loan-Self Occupied - Loan Certificate and Possession certificate		
Interest on House Property (Sec 80EE) - additional benefit of INR 50,000/-		

Upload Form 12BB

No file selected.

Upload

Generate Form 12BB

Declaration: ☐ I declare the information given above is true & correct. I undertake to inform immediately of any change in the above facts. Any Income tax liability arising out of wrong declaration will be my responsibility.

To submit the preview page, Please download the Form 12BB and attach the same in attachment tab with your signature.

Please Note:
No alteration or modification allowed in EPSF (Investment Proofs) tool once you submit the " Submit tax proof " button.

Figure 38: Form 12BB

- Please generate Form 12 BB, which has to be printed on a plain A4 size paper, acknowledge the same with your signature
- Click **"Browse"** to select the scanned copy of acknowledged "Form 12BB" from desired location.
- Click **Upload** to add the document successfully.

- Once the Form 12BB has been uploaded, you will get the “Submit Tax Proof” option as shown below. Without generating & uploading Form 12BB employee will not be able to complete the proof submission.

Donation for Approved Fund and Charities (Sec 80G)	0.00	0
Deduction for Permanent Disability (Sec 80U)	45000.00	0

Upload Form 12BB

Browse... No file selected.

Download last updated Form 12 BB - Last updated on - 04/12/2017 16:52:55

Declaration: ☐

I declare the information given above is true & correct. I undertake to inform immediately of any change in the above facts. Any Income tax liability arising out of wrong declaration will be my responsibility.

Please Note:

No alteration or modification allowed in EPSF (Investment Proofs) tool once you submit the " Submit tax proof " button.

Figure 39: Employee uploaded Form 12BB

- Please review all the details carefully before you agree and submit proofs.
- Employee also gets one copy of same in PDF.



*****Detailed Notes on Tax Proof for FY 2017-18 is available under Downloads tab of the ESS Portal which will serve as a complete knowledge bank for investment declaration and proof submission.**