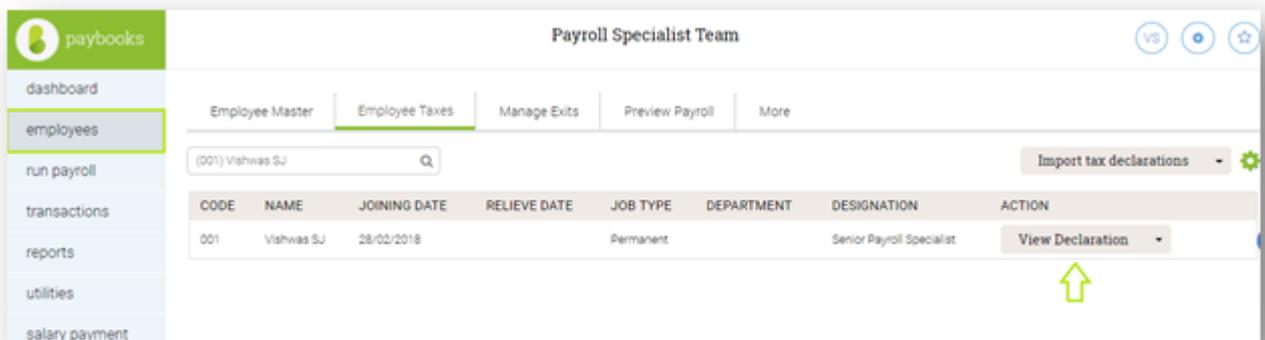How to update Investment Declarations Employee-wise, Bulk-wise and Audit the proofs?

Employee-wise (Declarations and Auditing)

Employee-wise (Declarations and Auditing the proofs)

Go to **Employees** >> click on **Employee Taxes** tab >> Search for the concerned Employee >> click on **View Declaration**.

After Clicking on "**View Declaration**", the below-mentioned screen will reflect

- Update the Declarations under the respective Heads as available at the left side
- **Save**

Each of the Heads is explained below

Deduction U/S 16:
In Paybooks, the section 16 components will be exempted by default for all Employees.
Hence Declaration not applicable here.

Employee Previous IT details:
This is applicable only for those Employees who have joined in the middle of the Financial Year
Update Earnings, TDS and PT (from April till joining the current Employer) under Planner
These will be available in the Form 12B issued by the former Employer.

Note:
Total Earnings:
In Paybooks, this is to be updated as under
Gross Earnings + Section 17 Components – Section 10 Components

Tax amount:

Whatever TDS updated during that tenure with the Previous Employer

PT Amount:
Whatever PT updated during that tenure with the Previous Employer

Exemption Under Section 10:
Update Section 10 amounts under Exemption U/S 10 option under Planner

House Rent Receipt:
Update Rent Declaration under the Planner column.

Note:
If rent paid exceeds INR 1.0 Lacs, then it is mandatory to update either of the two
PAN of the landlord
Declaration from the Landlord that he/she does not have PAN

To update the Owner's information, follow the below steps:
*In the declaration page, click "**House Rent Receipt**"*
Tick the "**Owner's PAN Proof/Declaration**" checkbox
Click "**Add row**"
Update the details and "**Save**"

Deduction Under Chapter 6A:

To update the Chapter 6A components,
Click "**Deduction Under Chapter 6A**" tab
Update the amounts against the respective sections under the Planner column
Save

Other Income:
To update Other Income, if any,
Click "**Other Income**" tab
Update the amount under Planner
Save

Note:

Income from other sources	:	Income apart from Salary
Income/Loss from house property	:	Any Income or Loss from house property
Interest on housing loan	:	Interest paid on Home Loan

What is Planner, Actual and Approved

Planner:

Enter declaration in **PLANNED** column in the FY starting, same will be considered for tax calculation till IT proof collection starts.

Actual:

Enter actual bill amount in the **ACTUAL** column at the year-end while submitting proofs.
Immediately after entering actual bill amount upload the scanned copy of bills in the portal.

Approved:

1. The Admin / HR audits the Proofs submitted by the Employees and updates the amount under this Column
2. If any Employee has not submitted any supporting documents, this column for such Employee should be updated as 0 and tick the "**Audit"** checkbox
3. This will be the final amount for IT computation

Audit button:

After updating the amount in the "**Approved**" column, tick the checkbox under Audit.
Only then, the Approved amount will be considered for IT computation.
Else, the amount under "**Planner**" column will be considered.

File name:

In this field, the name of the documents will reflect which is attached by the Employees.

Remarks:

If there are any remarks, the same can be entered in the Remarks option individually or Overall remarks, the same can viewed by employees at their end
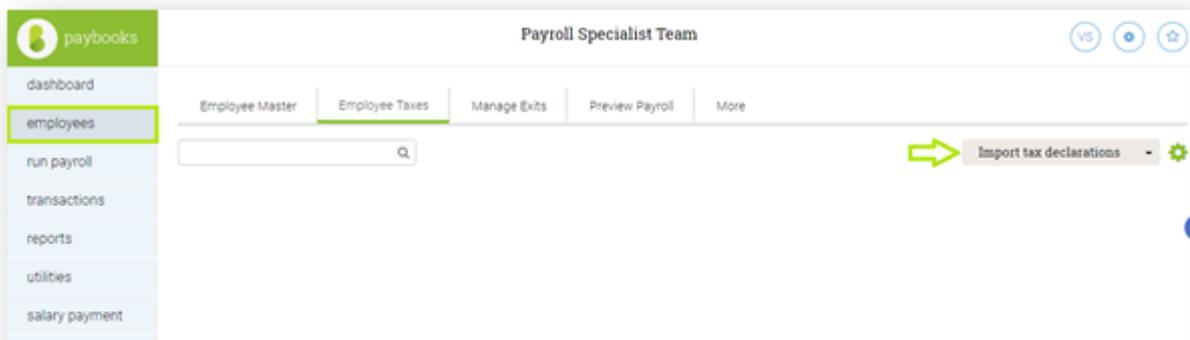
Note:
The file format should be only JPNG, PNG or PDF
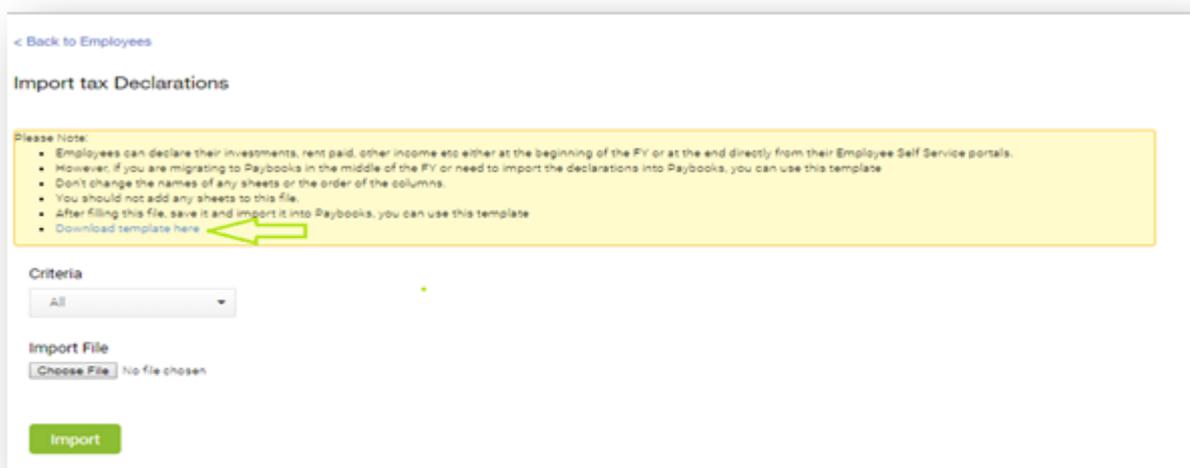The file size should not exceed more than 2MB

Bulk- wise (Declarations and Auditing the proofs)

Go to **Employees** >> **Employee Taxes** >> Click on **Import tax declaration** (not on the dropdown)

The below screen appears

Generate Template by clicking "**Download Template here**"
Once the template is generated, update the amount in the respective heads
Import the Template under the same path

Controlling ESS Access

Go to **Transactions menu >>** under **Income Tax Compliance >> click on Control ESS Access** link

Note -

1. Admin can import Declarations in bulk by keeping **Planner** column unlock, same will be considered for tax calculation till IT proof collection starts.
2. To import **Actual** bill, then lock the **Planner**.
3. To import **Approved** declarations, then lock the **Planner** and **Actual** column, by default audit option will enabled.