

ONLINE PROCEDURE FOR UPLOADING INVESTMENT PROOFS IN HRIS

Pre requisites/Guidelines for uploading the Investment document

1. All proofs/supporting documents needs to be submitted in PDF form.
2. PDF file is to be generated using the printer/scanner as the online facility supports **PDF format** only.
3. Please note that Service Tax component on premium is not allowable u/s 80C and 80D of the Income Tax Act,1961 (“ the Act”). **The service tax component should be excluded** while preparing and uploading the Declaration form.
4. In case of claim of tuition fees u/s 80C of the Act, please note that the deduction can be claimed only for full-time courses only including pre-nursery and playschool for maximum up to two children. Part-time, distance learning courses, private tuitions and coaching classes are not covered u/s 80C of the Act. Further, **only tuition fees** are eligible for deduction. Other expenses, such as transport charges, library charges, hostel charges, development fees or donation, etc. are not covered u/s 80C of the Act.
5. In case of claim of housing loan interest, **possession letter** is compulsory (**even if possession letter pertains to an old period**). Please upload the possession letter to enable us to process the claim. Please note that the Taxation department will not entertain claim of interest on housing loan in the absence of possession letter.
6. In case an employee has **availed a home loan**, then **PAN is mandatory** required to be furnished.
7. In case the **annual rent amount paid exceeds Rs 1 Lac**, then **PAN of Landlord Owner** is mandatorily required to be provided. In case of non-quoting of PAN of landlord, the tax declaration form shall be rejected.

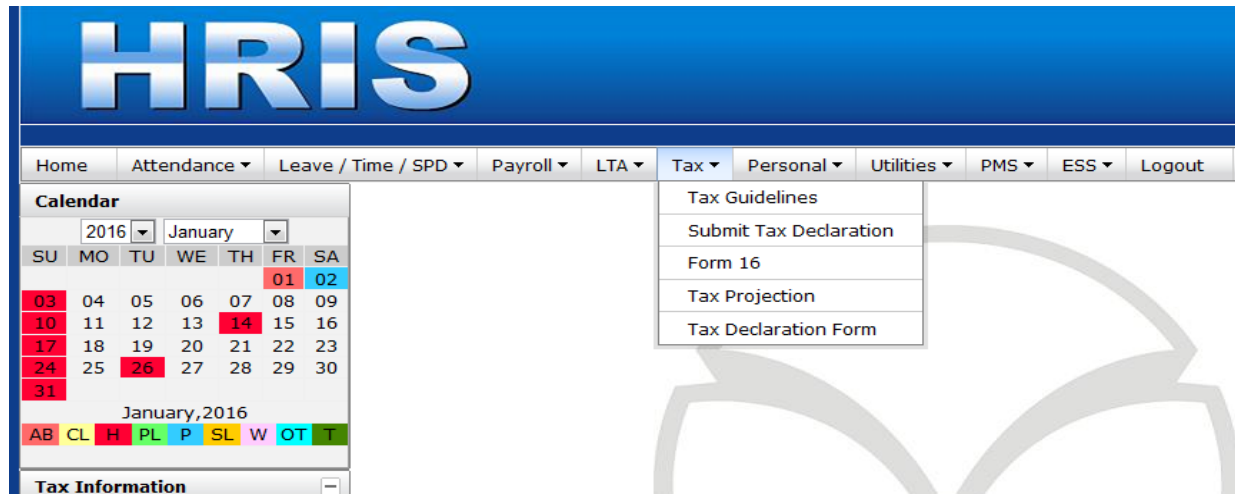
Employee can upload multiple documents/receipts by using multiple line items under same investment head (Example- Premium Receipts for 2 LIC policies). Employee can use **either** two line items with two PDF files pertaining to LIC policy **or** one line item with cumulative premium amount.

Please note that proofs under different investment head cannot be uploaded in single file.

For example if employee have 2 LIC policies, 1 PPF Investment , HRA Receipt, School/Tuition Fee Receipts then all proofs under different investment head needs to be scanned in different PDF file and uploaded against the respective investment head.

4 Steps...To login and upload

Login in HRIS >> Select “Tax” Menu >> Click on “Tax Guidelines”



Tax Guidelines:

It contains Guidelines for various exemptions / deductions available to employees in Financial Year 2017-18 (AY -2018-19) under the Act followed by declarations to be submitted as clarified below. To view / download tax guidelines in HRIS Module, please follow above snap shot:-

Employees are requested to read the guidelines before uploading any proof/declaration.

Followings are the declarations available in HRIS Module along with Tax Guideline.

1. Declaration for premium due in February and March, 2018.
2. Declaration for tuition fees paid in February and March, 2018
3. Let out property - Income/ (Loss) declaration
4. Joint home loan (when first holder is not employee) declaration

In case employee wants to give the declaration in lieu of proofs for **Point No. 1 & 2** as mentioned above, then he/she is required to enclose the **copy of last year’s actual proof /copy of premium receipts / tuition fees along with relevant annexure as above.**

In respect of deductions/ exemptions claimed for HRA, interest on self occupied property, loss on house property, all employees are requested to read the tax guidelines very carefully before filing the details.

In case of loss from house property, all employees are requested to attach declaration as mentioned in point no. 4 along with proof of receipt of rent, municipal taxes bill or valuation report from specified authorities mentioned in guidelines, interest certificate and possession letter in single PDF file only.

Upload the self attested Tax declaration:

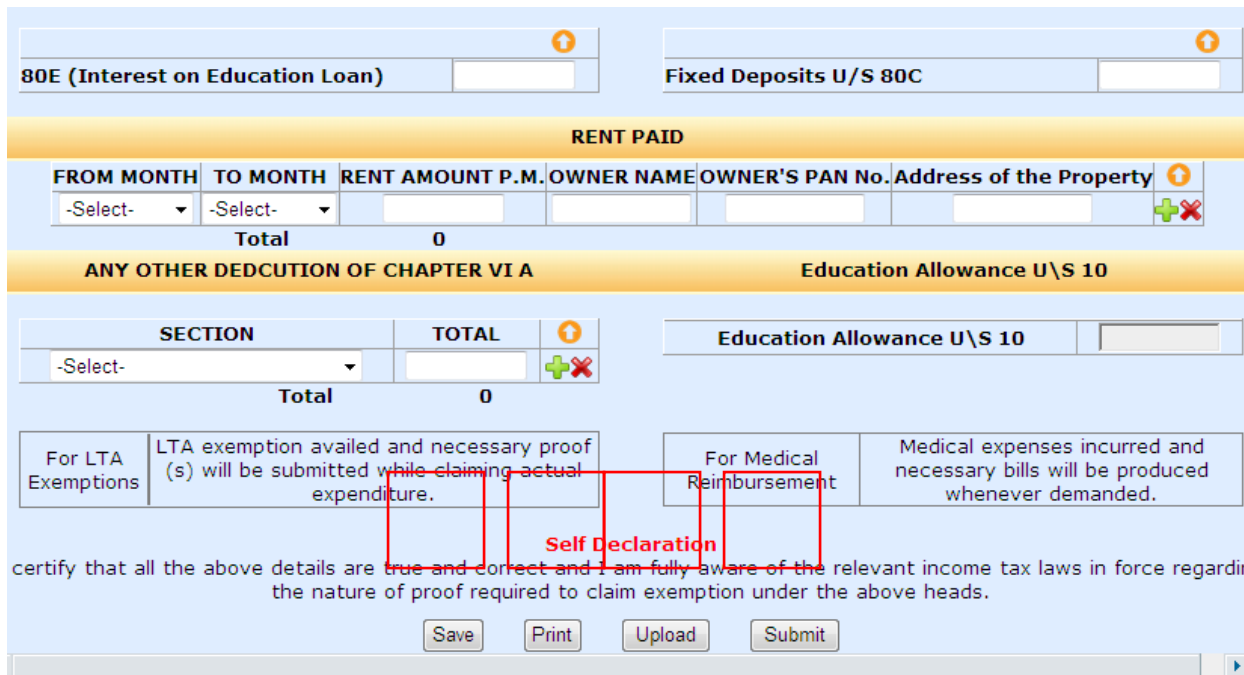
It is online declaration which is required to be filed by the employees. All employees are requested to fill in the declaration details investment-wise and upload related scanned documents (in PDF only), (Refer Page 5 to know the procedure for “How to upload scanned document/ proof”)

Save the Tax Declaration (1) below ->

Take a Print out of declaration form as (2) below ->

Sign the declaration form and scan the same in PDF Format and upload it as (3) below. Once the declaration is uploaded by the employee then one needs to press the “SAVE” button again.

LIC/PENSION				CONTRIBUTION TO ULIP			
Policy No.	Date	Amount	↑	Policy No.	Date	Amount	↑
			+X				+X
Total			0	Total			0
PUBLIC PROVIDENT FUND				MEDICAL INSURANCE PREMIUM			
A/C No.	Deposit Date	Amount	↑	↑			
			+X	(1) Medical Premium for self/Spouse/Children			
Total			0	(2) Medical Premium for Parents			
				<input type="checkbox"/> Senior Citizen			
INVESTMENT IN ELSE (MUTUAL FUND)				NSC (SHOULD BE IN THE NAME OF EMPLOYEE)			
Name of The Mutual Fund	Amount		↑	Policy No.	Date	Amount	↑
			+X				+X
Total		0		Total		0	
Self Occupied Property / Interest on Self Occupied Property Loan				Let out Property / Interest on Let out Property			
Name of the Housing Finance Co.				HOUSE OCCUPIED			
Date of possession or Construction				RENTED			
Principle Amt. Max 20000 before 01.04.1999 Max. 1,00,000 After 01.04.1999				(a) Rental Income (Annualy)			
Interest Amt. Max 30000 before 01.04.1999 Max. 1,50,000 After 01.04.1999				(b) Less Municipal Tax			
				(c) Net Assesment Value(NAV)(a-b)			
				(d) Deduction u/s 24(1) - Repairs 30% of NAV			
				(e) Deduction u/s 24(6) - Interest on Home Loan			
				(f) Total Deduction (d+e)			
				(g) Income From House Property (c-f)			
EXPLANATORY NOTE IF CLAIMING BOTH I.E. HRA EXEMPTION AND INTEREST ON HOUSING LOAN AT DIFFERENT LOCATIONS							
				CHILDREN			
				CHILD 1		CHILD 2	
				SCHOOL FEES (ANNUAL)			



80E (Interest on Education Loan)

Fixed Deposits U/S 80C

RENT PAID

FROM MONTH	TO MONTH	RENT AMOUNT P.M.	OWNER NAME	OWNER'S PAN No.	Address of the Property
-Select-	-Select-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total		0			

ANY OTHER DEDUCTION OF CHAPTER VI A

Education Allowance U\S 10

SECTION	TOTAL
-Select-	<input type="text"/>
Total	0

For LTA Exemptions LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.

For Medical Reimbursement Medical expenses incurred and necessary bills will be produced whenever demanded.

Self Declaration

certify that all the above details are true and correct and I am fully aware of the relevant income tax laws in force regarding the nature of proof required to claim exemption under the above heads.

Save Print Upload Submit

- 1
- 2
- 3
- 4

Submit the Tax declaration Form in 4 steps as below given screenshot

This is the last step towards submitting Declaration Form with all necessary proofs to the Taxation Department. Before submitting the declaration form, all employees are required to upload of Declaration Form (self attested) with copies of all necessary proofs to support / justify the declaration. All employees are requested to verify and check the arithmetical accuracy for all the proofs submitted and declaration filed to ensure logical accuracy. Once the employee submits the declaration, it cannot be reversed and the same is to be considered as final declaration for the purpose of arriving at his/her income tax liability for the Financial Year 2017-18 (Assessment Year – 2018-19).

Note:

Each employee is requested to retain their original signed declaration along with hard copies of all the necessary supporting with themselves.

Understanding Terminologies of different ICON



To upload the document



To add line item under same investment head



To cancel the line item

How to upload the scanned supporting document/proofs/declaration, etc.

Employee needs to save the data frequently while using this utility/portal

How to upload the proof

- Click on
- Select appropriate line item from the drop down box.
- Select the file saved in desktop / any folder.
- Upload the PDF file.

The screenshot shows the HRIS Tax Declaration portal interface. The main window displays the 'LIC/PENSION' section with a table containing one entry: Policy No. 5555, Date 01/01/2014, and Amount 50000. Below this is the 'PUBLIC PROVIDENT FUND' section with a table showing A/C No., Deposit Date, and Amount, with a total of 0. The 'INVESTMENT IN ELSE (MUTUAL FUND)' section also shows a table with Name of The Mutual Fund and Amount, with a total of 0. The 'Self Occupied Property / Interest on Self Occupied Property Loan' section is partially visible at the bottom.

An 'Upload File' dialog box is open over the portal. It shows the 'Cluster' as 'LIC' and the 'Select' dropdown set to '5555'. The 'Select File' field shows the path 'D:\Tax - Year 13-14\LIC-'. A file named 'LIC-Premium Receipt - 5555 .pdf' is listed in the file selection area. The dialog box also includes an 'Upload File' button and a 'Browse...' button.

GUIDELINES TO FILL TAX DECLARATION ACTUAL INVESTMENT

PROOF:

Employee provides **Actual Investment Proof Submitted during DECEMBER to JANUARY**

The Taxation Department approves his/her investment details based on supporting documents and finally transfers his/her total investment in HRMS - Tax Projection.

❖ **Submit Declaration**

➤ **Click on Tax → Submit Tax Declaration.**

The screenshot shows the HRIS web application interface. The browser address bar displays <http://hris.cadilapharma.in/hris/mainController.do?ac>. The user is logged in as Jaydeep Sheth (1053933). The navigation menu includes Home, Attendance, Leave / Time / SPD, Payroll, LTA, Tax, Personal, Utilities, PMS, Admin, ESS, and Logout. The Tax menu is expanded, showing options for Tax Guidelines, Submit Tax Declaration, Form, and Tax Projection. A tooltip over the Form option reads "SELECT FOR SUBMIT TAX DECLARATION".

Calendar
2016 July
SU MO TU WE TH FR SA
03 04 05 06 07 08 09
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31
July, 2016
AB CL H PL P SL W OT T

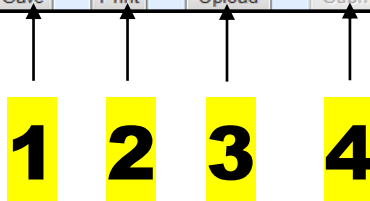
User Manuals

Tax Information
Possible tax for the Month of July is : Rs 0.
Please see your tax, Investment and LTA.
In case of any problem, Please contact Mr. Jaydeep Sheth, Ext. 114
Please go through your family details in HRIS. In case of any addition/deletion/correction, please contact HR Department with details in the recordbook.

http://hris.cadilapharma.in/hris/mainController.do?actionFlag=taxHandler&methodFlag=getTaxData

- Enter tax related details and click on Save.

LIC/PENSION				CONTRIBUTION TO ULIP																			
Policy No.	Date	Amount		Policy No.	Date	Amount																	
			+X				+X																
Total		0		Total		0																	
PUBLIC PROVIDENT FUND				MEDICAL INSURANCE PREMIUM																			
A/C No.	Deposit Date	Amount																					
			+X																				
Total		0																					
INVESTMENT IN ELSE (MUTUAL FUND)				NSC (SHOULD BE IN THE NAME OF EMPLOYEE)																			
Name of The Mutual Fund	Amount			Certificate No.	Date	Amount																	
			+X				+X																
Total		0		Total		0																	
Self Occupied Property / Interest on Self Occupied Property Loan				Let out Property / Interest on Let out Property																			
Name of the Housing Finance Co. <input type="text"/> Date of possession or Construction <input type="text"/> Principle Amt. Max [1,50,000] <input type="text"/> Interest Amt. Max [2,00,000] <input type="text"/>				<table border="1"> <thead> <tr> <th>HOUSE OCCUPIED</th> <th>RENTED</th> </tr> </thead> <tbody> <tr><td>(a) Rental Income (Annually)</td><td>0</td></tr> <tr><td>(b) Less Municipal Tax</td><td>0</td></tr> <tr><td>(c) Net Assesment Value (NAV) (a-b)</td><td>0</td></tr> <tr><td>(d) Deduction u/s 24(1) - Repairs 30% of NAV</td><td>0</td></tr> <tr><td>(e) Deduction u/s 24(6) - Interest on Home Loan</td><td>0</td></tr> <tr><td>(f) Total Deduction (d+e)</td><td>0</td></tr> <tr><td>(g) Income From House Property (c-f)</td><td>0</td></tr> </tbody> </table>				HOUSE OCCUPIED	RENTED	(a) Rental Income (Annually)	0	(b) Less Municipal Tax	0	(c) Net Assesment Value (NAV) (a-b)	0	(d) Deduction u/s 24(1) - Repairs 30% of NAV	0	(e) Deduction u/s 24(6) - Interest on Home Loan	0	(f) Total Deduction (d+e)	0	(g) Income From House Property (c-f)	0
HOUSE OCCUPIED	RENTED																						
(a) Rental Income (Annually)	0																						
(b) Less Municipal Tax	0																						
(c) Net Assesment Value (NAV) (a-b)	0																						
(d) Deduction u/s 24(1) - Repairs 30% of NAV	0																						
(e) Deduction u/s 24(6) - Interest on Home Loan	0																						
(f) Total Deduction (d+e)	0																						
(g) Income From House Property (c-f)	0																						
EXPLANATORY NOTE IF CLAIMING (I.E. BOTH HRA EXEMPTION AND INTEREST ON HOUSING LOAN) <input type="text"/>				<table border="1"> <thead> <tr> <th>CHILDREN</th> <th>CHILD 1</th> <th>CHILD 2</th> </tr> </thead> <tbody> <tr> <td>SCHOOL FEES (ANNUAL)</td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td></td> </tr> </tbody> </table>				CHILDREN	CHILD 1	CHILD 2	SCHOOL FEES (ANNUAL)			Total									
CHILDREN	CHILD 1	CHILD 2																					
SCHOOL FEES (ANNUAL)																							
Total																							
80E (Interest on Education Loan) <input type="text"/>				Fixed Deposits U/S 80C <input type="text"/>																			
RENT PAID																							
FROM MONTH	TO MONTH	RENT AMOUNT P.M.	OWNER NAME	OWNER'S PAN No.	Address of the Property																		
-Select-	-Select-																						
Total		0																					
ANY OTHER DEDCUCTION OF CHAPTER VI A				Education Allowance U\S 10																			
SECTION	TOTAL			Education Allowance U\S 10 <input type="text"/>																			
-Select-			+X																				
Total		0																					
National Pension																							
No. / Name	Date	Amount																					
			+X																				
Total		0																					
For LTA Exemptions	LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.			For Medical Reimbursement	Medical expenses incurred and necessary bills will be produced whenever demanded.																		
Declaration																							
I hereby declare that I have read and understood the guideline provided by the company and that all information provided above is true and correct in all respects. I also undertake to indemnify the company for any loss or liability that may arise the event of any incorrect information provided by me.																							
Download Self Attested File																							
Save		Print		Upload		Submit																	



STEP -1

➤ FILL UP YOUR INVESTMENT DATA

80E (Interest on Education Loan) <input type="text" value="29000"/>	Fixed Deposits U/S 80C <input type="text" value="500000"/>					
RENT PAID						
FROM MONTH	TO MONTH	RENT AMOUNT P.M.	OWNER NAME	OWNER'S PAN No.	Address of the Property	
April	March	5000	SDSDGD	AAAAAA	AAAAAAA	+X
Total		60000				
ANY OTHER DEDCUCTION OF CHAPTER VI A		Education Allowance U\S 10				
SECTION	TOTAL					Education Allowance U\S 10 <input type="text" value="2400"/>
80U Disability more than 40%	80000					
80U Disability more than 80%	130000					
80DD Disability more than 40%	80000					
80DD Disability more than 80%	130000					
Total		420000				
National Pension			Suknya Samrudhi Yojna			
No. / Name	Date	Amount	No. / Name	Date	Amount	
SDFDGDGFG	05/03/2016	60000	SADFASDFASDF	05/03/2016	500000	+X
Total		60000	Total		500000	
For LTA Exemptions	LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.		For Medical Reimbursement	Medical expenses incurred and necessary bills will be produced whenever demanded.		
Declaration						
I hereby declare that I have read and understood the guideline provided by the company and that all information provided above is true and correct in all respects. I also undertake to indemnify the company for any loss or liability that may arise, in the event of any incorrect information provided by me.						
Download Self Attested File						
<input type="button" value="Save"/>		<input type="button" value="Print"/>		<input type="button" value="Upload"/>		<input type="button" value="Submit"/>

1

➤ **Fill Up data and Save**

80E (Interest on Education Loan) <input type="text"/>		Fixed Deposits U/S 80C <input type="text"/>				
RENT PAID						
FROM MONTH	TO MONTH	RENT AMOUNT P.M.	OWNER NAME	OWNER'S PAN No.	Address of the Property	↑
-Select-	-Select-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+X
Total		0				
ANY OTHER DEDUCTIONS		Education Allowance U\S 10				
SECTION	<input type="text"/>	Education Allowance U\S 10		<input type="text" value="2400"/>		
-Select-						
National Savings		Suknya Samrudhi Yojna				
No. / Name		No. / Name	Date	Amount	↑	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+X	
Total		0	Total		0	
For LTA Exemptions	LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.	For Medical Reimbursement	Medical expenses incurred and necessary bills will be produced whenever demanded.			
Declaration						
I hereby declare that I have read and understood the guideline provided by the company and that all information provided above is true and correct in all respects. I also undertake to indemnify the company for any loss or liability that may arise, in the event of any incorrect information provided by me.						
Download Self Attested File						
<input type="button" value="Save"/> <input type="button" value="Print"/> <input type="button" value="Upload"/> <input type="button" value="Submit"/>						



Tax declaration data saved successfully..!!

STEP -2

➤ TAKE PRINT OUT SECOND OPTION

ANY OTHER DEDCUTION OF CHAPTER VI A				Education Allowance U\S 10			
SECTION		TOTAL		Education Allowance U\S 10			
80U Disability more than 40% ▾		80000	+X			2400	
80U Disability more than 40% ▾		130000	+X				
80DD Disability more than 40% ▾		80000	+X				
80DD Disability more than 40% ▾		125000	+X				
Total		415000					
National Pension				Suknya Samrudhi Yojna			
No. / Name	Date	Amount		No. / Name	Date	Amount	
DDDDDD	05/03/2016	60000	+X	SSSSSS	05/03/2016	50000	+X
Total		60000		Total		50000	
For LTA Exemptions	LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.			For Medical Reimbursement	Medical expenses incurred and necessary bills will be produced whenever demanded.		
Declaration							
hereby declare that I have read and understood the guideline provided by the company and that all information provided above is true and correct in all respects. I also undertake to indemnify the company for any loss or liability that may arise, in the event of any incorrect information provided by me.							
Download Self Attested File							
Save		Print		Upload		Submit	

2

STEP -3

➤ Check all details on declaration, affix signature and upload scan copy of the Declaration Form. (Follow instructions below)

(k)	Suknya Samrudhi Yojna	0	
(l)	Section 80CCC (Pension Scheme)		
(i)	Section 80CCD (NPS) (1B)	0	
(ii)	Section 80D (Medical Insurance (Self)	30000	
(iii)	Section 80D (Medical Insurance (Parants)	35000	
(B)	Other sections (e.g. 80E, 80DD,80U etc.) under Chapter VI-A		
	80U Disability more than 40% 80000		
	80U Disability more than 40% 130000		
	80DD Disability more than 40% 80000	415000	
	80DD Disability more than 40% 125000		

Verification

I, Jaydeep Sheth, son/daughter of Ygeshbhai Sheth do hereby certify that the information given above is complete and correct.

Place.....

Date.....

Signature of Employee

Designation : ASSISTANT
MANAGER

Full Name : Jaydeep Ygeshbhai Sheth

For LTA Exemptions	LTA exemption availed and necessary proof(s) will be submitted while claiming actual expenditure.	For Medical Reimbursement	Medical expenses incurred and necessary bills will be produced whenever demanded.
--------------------	---	---------------------------	---

print

➤ After You have Check All Detail Than Finally Upload Scan Copy

National Pension				Suknya Samrudhi Yojna			
No. / Name	Date	Amount		No. / Name	Date	Amount	
DDDDDD	05/03/2016	60000	+X	SSSSSS	05/03/2016	50000	+X
Total		60000		Total		50000	

For LTA Exemptions | LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.

For Medical Reimbursement | Medical expenses incurred and necessary bills will be produced whenever demanded.

Declaration
hereby declare that I have read and understood the guideline provided by the company and that all information provided al s true and correct in all respects. I also undertake to indemnify the company for any loss or liability that may arise, in the e of any incorrect information provided by me.

[Download Self Attested File](#)

Save Print **Upload** Submit

3

April March 5000 DDDDDD DDDDDD DDDDDD

Total 60000

ANY OTHER DEDCUATION OF CHAPTER VI A Education Allowance U\S 10

SECTION	TOTAL		Education Allowance U\S 10
80U D			
80U D			
80DD			
80DD			

Message from webpage

Have you uploaded all supporting documents(Proofs) ? If not, pl do it first prior to use of 'Upload' of Tax Declaration, as after this Supporting documents(proofs) can not be submitted.

OK

Education Allowance U\S 10

No	Date	Amc
DDDDDD	05/03/2016	60000
Total		60000
SSSSSS	05/03/2016	50000
Total		50000

For LTA Exemptions | LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.

For Medical Reimbursement | Medical expenses incu necessary bills will be p whenever deman

Total		60000						
ANY OTHER DEDCUTION OF CHAPTER VI A				Education Allowance U\S 10				
SECTION		TOTAL			Education Allowance U\S 10		2400	
80U Disability more than								
80U Disability more than								
80DD Disability more than								
80DD Disability more than								
Nation				Suknya Samrudhi Yojna				
No. / Name	Date	Amount			No. / Name	Date	Amount	
DDDDDD	05/03/2016	60000			SSSSSS	05/03/2016	50000	
Total		60000			Total		50000	

Message from webpage

Do you want to save details ?

OK Cancel

Tax Information FROM MONTH TO MONTH RENT

http://hris.cadilapharma.in/hris/jsp/hris/MainController.do?action

Upload File

Cluster : SelfAttestedUpload

Select -Select-

Select File Browse...

Upload File

NO	FILE
1	scan.pdf

100%

➤ AFTER UPLOADING RELEVANT SUPPORTING DOCUMENTS, CLICK SAVE DATA

Tax Information
Possible tax for the Month of July is : Rs 0.
Please see your tax, Investment and LTA.
In case of any problem, Please contact Mr.Jaydeep Sheth, Ext. 114
Please go through your family details in HRIS. In case of any addition/deletion/correction, please contact HR Department with details in the prescribed format. The format is available in CADENET/FFR.
[Please Update Address](#)

MONTH	TO MONTH	P.M.	NAME	No.	Property
April	March	5000	DDDDDD	DDDDDD	DDDDDD
Total		60000			

ANY OTHER DEDCUTION OF CHAPTER VI A Education Allowance U\S 10

SECTION	TOTAL	Education Allowance U\S 10
80U Disability more th		
80U Disability more th		
80DD Disability more t		
80DD Disability more t		

Nat Suknya Samrudhi Yojna

No. / Name	Date	Am
test	06/07/2016	60000
123TEST	05/07/2016	
Total		200

LTA exemption availed and necessary proof Medical expenses incl

Message from webpage
Are you sure you want to save data?
OK Cancel



Tax declaration data saved successfully..!!

STEP -4

- Then go to “Submit Tax Declaration Form” and upload Tax Declaration Form. If you select “Submit” and upload your file, then no further changes can be made in the Tax Declaration Form. Therefore, check all details thoroughly before selecting “Submit” button.

No. / Name	Date	Amount		No. / Name
test	06/07/2016	60000	+X	123TEST
Total		60000		

For LTA Exemptions	LTA exemption availed and necessary proof (s) will be submitted while claiming actual expenditure.	For Medical Reimbursement
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Declaration

hereby declare that I have read and understood the guideline provided by the company and the same is true and correct in all respects. I also undertake to indemnify the company for any loss or damage of any incorrect information provided by me.

[Download Self Attested File](#)

4



Tax declaration submitted successfully..!!

- Then finally submit your tax declaration form and your tax declaration form Approved By taxation Department in **Feb Month Till 28th**