

Oracle Fusion Cloud Human Resources

How do I configure employee self service pages and investment declaration for India?

FA Latest



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1 Set up employee self service pages and investment declaration

About this Playbook

Use this playbook to set up and configure Redwood pages for employee self-service and enable your employees to manage their investment declaration and proof submission.

This playbook covers the tasks for these areas:

- Enabling the profile options for employee self-service pages
- Set up the timeline for self-service pages for:
 - Selecting the tax regime
 - Investment declaration
 - Voluntary provident fund
 - Investment proof submission
 - Access for new joiners
 - Access for resigning employees
- Complete the investment declaration
- Review summary and select tax regime
- Complete the proof submission
- Verify and approve documents of investment proof

Set Timeline for Self Service Pages

Enable Profile Options

You'll need to enable the respective profile options for other pages to get the Redwood user experience.

You also need to enable the ORA_HCM_VBCS_PWA_ENABLED profile to enable the HCM Redwood pages. However, we recommend you evaluate your business requirements before enabling the Redwood experience.

To enable the profile options to view the Redwood pages:

Note: Setup and Maintenance > Search > Manage Administrator Profile Values

1. On the **Manage Administrator Profile Values** page, search for and select these profile options:

Page	Profile Option Code	Default Value
Investment Declaration Window for User	ORA_HRX_IN_INVESTMENT_DEC_USER_WINDOW	N
Number of Days as a New Joiner	ORA_HRX_IN_NEWHIRE_DAYS_JOINED	0
Investment Declaration Window for New Joiner	ORA_HRX_IN_NEWHIRE_TERM_ID_WINDOW	N
Proof Submission Window for New Joiner	ORA_HRX_IN_NEWHIRE_TERM_PS_WINDOW	N
Tax Regime Window for New Joiner	ORA_HRX_IN_NEWHIRE_TERM_TR_WINDOW	N
Number of Days as New Joiner to Enter Previous Employment Data	ORA_HRX_IN_PREVIOUS_EMP_DAYS_JOINED	0
Enable Previous Employment Window for New Joiner	ORA_HRX_IN_PREVIOUS_EMP_WINDOW_ENABLE	N
Proof Submission Window for User	ORA_HRX_IN_PROOF_SUB_USER_WINDOW	N
Tax Regime Window for User	ORA_HRX_IN_TAX_REGIME_USER_WINDOW	N

Tax Regime Selection

You can set up the accessibility for employees to select the preferred tax regime for the financial year.

This timeline is available for a specific period each month in the financial year, until the proof submission period begins. The tax regime can be the old or new tax regime, that forms the basis for the investment declaration flow. The tax regime needs to be maintained both for the regular employees and new hires. For new joiners, joining in the middle of a financial year, the new tax regime can be selected.

Here's how you can set up the access to the tax regime page for an employee:

Note: Setup and Maintenance > Tasks > Search > Manage Legal Reporting Unit HCM Information

1. Set the scope for this task by selecting the parent Legal Entity and then the Legal Reporting Unit.
2. On the Manage Legal Reporting Unit HCM Information page, select the **Tax Reporting Unit** and click **Next**.
3. Select the **Tax Reporting Unit Type** and click **Next** to fill the respective information.
4. In the Tax Regime Information, specify the timeline to select the tax regime.

Field	Description
Effective Period Start Date	Enter the start date from when the required tax regime can be selected.
Effective Period End Date	Enter the end date before which the tax regime needs to be selected.

5. **Note:** To change the tax regime selection timeline, edit the tax reporting unit in Correction mode. Using the update mode only creates the TRU update history.
6. Click **Submit**.

Investment Declaration

You can configure the accessibility to the investment declaration page in self-service portal, for employees to declare their investment information for the financial year.

Investment declaration timeline is available at the beginning of each financial year except during the freeze period. This is from April to November in each financial year and from the 1st to 14th of every month. The investment information needs to be maintained both for the regular employees and new hires. The investment declaration values are used to calculate the income tax to be deducted for the employee.

Here's how you can set the timeline for investment declaration:

Note: Setup and Maintenance > Tasks > Search > Manage Legal Reporting Unit HCM Information

1. Set the scope for this task by selecting the parent Legal Entity and then the Legal Reporting Unit.
2. On the Manage Legal Reporting Unit HCM Information page, select the income tax TRU and click **Apply and Go to Task**.
3. Edit the tax reporting unit of type Income Tax by selecting the **Correct** mode.
4. In the Investment Declaration Period, enter the period within the financial year and the timeline every month for capturing the employee's investment declaration information:

1.

Field	Description
Effective Period Start Date	Enter the start date from when the investment proof documents can be uploaded.
Effective Period End Date	Enter the end date after which proof documents can't be submitted.
Start Day of Every month	Enter the start date in every month when the investment declaration info can be updated.

Field	Description
End Day of Every month	Enter the end date in every month after which the investment declaration info can't be updated.

Note:

- a. To change the investment declaration timeline, edit the tax reporting unit in Correction mode. Using the update mode only creates the TRU update history.
- b. Verify that there's no overlap of dates for investment declaration and submission of documents for investment proof.

5. Submit the investment declaration details.

Voluntary Provident Fund

You can configure the accessibility to the voluntary provident fund page in self-service portal, for employees to declare their voluntary provident fund (VPF) contribution for the financial year.

VPF declaration timeline is available at the beginning of each financial year except during the freeze period. This is from April to November in each financial year and from the 1st to 14th of every month. The VPF declaration needs to be maintained both for the regular employees and new hires.

Here's how you can set the timeline for VPF declaration:

Note: Setup and Maintenance > Tasks > Search > Manage Legal Reporting Unit HCM Information

1. Set the scope for this task by selecting the parent Legal Entity and then the Legal Reporting Unit.
2. On the Manage Legal Reporting Unit HCM Information page, select the provident fund TRU and click **Apply and Go to Task**.
3. Edit the tax reporting unit of type Provident Fund by selecting the **Correct** mode.
4. In the Voluntary Provident Fund section, enter the period within the financial year and the timeline every month for capturing the employee's VPF information:

1.

Field	Description
Effective Period Start Date	Enter the start date from when the VPF information can be added .
Effective Period End Date	Enter the end date after which VPF info can't be submitted.
Start Day of Every month	Enter the start date in every month when the VPF info can be updated.
End Day of Every month	Enter the end date in every month after which the VPF info can't be updated.

Field	Description

Note:

- a. To change the VPF declaration timeline, edit the tax reporting unit in Correction mode. Using the update mode only creates the TRU update history.

5. Save the VPF information.

Proof Submission

You can configure the accessibility to the proof submission page in self-service portal, for employees to submit their investment proof related documents for the financial year.

This time period for employees to submit their investment proof documents is usually between December to January in each financial year. The investment proof documents need to be submitted both by the regular employees and terminated employees.

Here's how you can set the timeline for proof submission:

Note: Setup and Maintenance > Tasks > Search > Manage Legal Reporting Unit HCM Information

1. Set the scope for this task by selecting the parent Legal Entity and then the Legal Reporting Unit.
2. On the Manage Legal Reporting Unit HCM Information page, select the income tax TRU and click **Apply and Go to Task**.
3. Edit the income tax TRU by selecting the **Correct** mode.
4. In the Proof Submission, specify the timeline to submit the documents of investment proof for the financial year.

1.

Field	Description
Effective Period Start Date	Enter the start date from when the investment proof documents can be uploaded.
Effective Period End Date	Enter the end date after which proof documents can't be submitted.

Note:

- a. To change the proof submission timeline, edit the tax reporting unit in Correction mode. Using the update mode only creates the TRU update history.
- b. Verify that there's no overlap of dates for investment declaration and submission of documents for investment proof.

Verify that there's no overlap of dates for investment declaration and submission of investment proof documents.

5. Click **Submit**.

Access for New Joiners

Employees newly joining your company need to access the self-service pages to maintain their investment declaration information and add their previous employment information.

Enable Profile Options for New Joiners

Note: Setup and Maintenance > Tasks > Search > Manage Administrator Profile Values

1. On the **Manage Administrator Profile Values** page, search for and select these profile options:

Profile Options	Description
ORA_HRX_IN_NEWHIRE_DAYS_JOINED	The number of days from joining with default value 0 defined at the organization level
ORA_HRX_IN_NEWHIRE_TERM_ID_WINDOW	Enable the investment declaration page in the ESS portal for new employees with default value N defined at organization level
ORA_HRX_IN_NEWHIRE_TERM_PS_WINDOW	Enable the proof submission window page for new employees with default value N defined at organization level
ORA_HRX_IN_NEWHIRE_TERM_TR_WINDOW	Enable the tax regime selection page for new employees with default value N defined at organization level
ORA_HRX_IN_PREVIOUS_EMP_DAYS_JOINED	A specific time period within which a new employee needs to provide their previous work history details with default value 0 defined at organization level
ORA_HRX_IN_PREVIOUS_EMP_WINDOW_ENABLE	Enable previous employment window to enter the previous employment details with default value N defined at organization level

2. Select **Yes** in the **Profile Value** field.
3. Save the values and proceed.

Enable Redwood Pages for Employee Self-Service Previous Employment

To enable any of the Redwood pages, the central profile option ORA_HCM_VBCS_PWA_ENABLED (Enable VBCS Progressive Web Application User Interfaces across HCM application) needs to be set to Yes.

Access for Resigning Employees

You need to set up the Proof Submission page access for employees leaving your organization to upload their documents of investment proof.

You need to approve the investment proof documents that submitted by the employee, set the end date for the payroll relationship and calculation cards after the final payroll processing date.

Set Up Self Service Access for Resigning Employees

In the Manage Profile Options task, set the **ORA_HRX_IN_PROOF_SUB_USER_WINDOW** profile option to Y for the terminated employees to access the Proof Submission page in the self service portal. They need to submit all the documents of investment proof in the specific timeline, for your approval.

Approve the Submitted Proof Documents

You need to verify and approve all the submitted documents of investment proof for the terminated employee's income tax computation. follow these steps:

1. From the home page, navigate to **Person Management (search for employee) > Calculation Cards > Statutory Deductions > Taxes > Income Tax > Select Regime and Complete Declarations**.
2. Click **Proof Verification and Approval** to view the uploaded documents of investment proof
3. Set to **Verified and Approved** status to be included in the employee's payroll processing for the financial year.

Set the End Date for the Payroll Relationship

When you terminate an employee or end an assignment record, the Payroll Relationship page displays the corresponding dates. These dates control how earnings and deductions are processed for the terminated employment record.

For example, Vijay resigned from a teaching post at National High School, and the line manager enters a termination date of 22-July-2020. The application will process Vijay's last payroll payment for 31-July-2020. You can view these termination dates on the payroll relationship page for Vijay. These dates show up at all the employment levels of Vijay, such as assignment, associated payroll, and payroll relationship. This image shows Vijay's payroll processing dates and the behavior of the application for handling the payroll records:

Name	Date	Application Behavior
Last Standard Earnings Date	22-JUL-2020	Sets the Last Standard Earnings Date as Vijay's termination date.
Last Standard Process Date	31-JULY-2020	Sets the Last Standard Process Date as the process date of the payroll period in which Vijay's termination occurred.
Final Close Date	31-AUG-2021	Enter a Final Close Date on Vijay's assignment. This date will carry over to Vijay's payroll, payment methods and payroll relationship records. The Final Close Date ends the payroll records. You can't perform any payroll actions for Vijay

Name	Date	Application Behavior
		<p>after this date, such as calculate payroll, make retro payments, or balance adjustments.</p> <p>The date you provide would depend on your business requirements, such as when your company makes commission payments to terminated employees. However, the best approach is to enter a Final Close date that falls after tax year-end. You can perform any balance adjustments as part of your year-end processing.</p> <p>Note: If you enter a Final Close date for a person who has other active assignments, the payroll relationship still remains active.</p>
End Date	31-AUG-2021	This date is defaulted when you enter the Final Close Date.

Exclude Terminated Employees from Process Consideration

You terminated Rahul's assignment on 03, June 2014. The termination process automatically sets the last standard earnings date to the termination date (03, June 2014). The process also sets the last standard process date to the end date of weekly payroll (06, June 2014). The termination process doesn't set a final close date.

To ensure payroll processes stop considering Rahul for processing after one full year after termination, you set the final close date to 03, June 2015.

Note: The latest entry date defined for any severance payment elements determines the last date you can enter element entry details for the terminated employee's severance payment. You can view the latest entry date setting on the Element Summary section of the Elements page.

Complete Investment Declaration

Add House Rent Details

Add the house rent and the landlord information for an employee.

You can declare the rented house and landlord details for the employees, who want to claim HRA exemption, as a payroll user.

Employees can access this page from the employee self service portal.

Add House Rent Details

Here's how you can add the house rent details:

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declaration > House Rent Details

1. Enter the details of the rental residence:

Field	Description
From Date	Select the date from the calendar dialog box. This is the start of the month in the current financial year. Note: You can't specify a date before the Payroll Run date.
To Date	Select the date from the calendar dialog box. This is the end of the month in the current financial year. Note: You can't specify a date before the Payroll Run date.
Metro	Select the Metro checkbox. The amount of exemption also depends on the city type (Metro or Non Metro) in which the employee resides.
Address	Enter the address of the rental residence.

2. Enter the house owner information as shown.

Field	Description
Landlord's Name	Enter the name of the house owner.
Landlord's Address	Enter the house owner's address.
Rent per Month	Enter the house rent per month.
Landlord Type	Select the landlord type from the list: <ul style="list-style-type: none"> ○ Government ○ Non resident ○ Others
PAN Details	Select the checkbox which is applicable: <ul style="list-style-type: none"> a. Declaration from Landlord: No further details are required. During proof submission, the relevant declaration documents need to be furnished.

Field	Description
	<p>b. PAN of Landlord: You need to capture the landlord's PAN number.</p> <p>Note: If you select the PAN of Landlord checkbox, you need to enter the landlord PAN number.</p> <p>c. Not applicable: No PAN or declaration from landlord is required. This is the default option.</p>
Landlord's PAN	Enter the landlord's PAN info.

3. Submit the property and house owner details.

Add House Loan and House Property Info

Declare the house loan, self occupied, and let out property information for an employee.

As a Payroll User, you can enter the house loan and house property information for an employee. The house property can be a self occupied or a let out property. You can enter multiple property (employee) information, which includes a maximum of 2 self occupied properties and the let out property information. This data helps the employee avail the eligible exemptions from income tax.

As an employee you can access the investment declaration page from the employee self service portal.

Note: According to the new tax regime, you can capture only the let out property information. The self occupied property section appears disabled.

Declare House Property Information

Note: Payroll Calculation > Manage Person > Manage Calculation Card > Income Tax Deductions > Complete Investment Declaration > House Property and House Loan

1. Add the house property information in the House Property section:

Field	Description
House Property Information	Select the property type Self Occupied or Let Out .
Address	Enter the address of the property
Stamp Duty/ Registration Charges Paid Date	Select the date when the stamp duty or registration charges was paid, from the calendar dialog box.

Field	Description
Stamp Duty and Registration Charges Paid	Enter the amount, which has been paid for the stamp duty or registration charges. This is applicable only if the stamp duty or registration charges paid date falls in the current financial year.
First Property	Select this checkbox if this is the first property. This is relevant for self occupied property. If you need to declare multiple property information for the financial year, you can select only one property as the first property.
Date of Possession	Select the date of possession of the property from the calendar dialog box.

2. Save the details of the house property.

Declare Rent and Taxes

Note: Payroll Calculation > Manage Person > Manage Calculation Card > Income Tax Deductions > Complete Investment Declaration > House Property and House Loan

1. Add the house rent and taxes information for any let out property.

Field	Description
Annual Rent Received	Enter the sum of rental income received for current financial year.
Municipal Tax Paid	Enter the municipal taxes paid for the current financial year.
Amount of Loss carried forward from previous years	Enter the amount of loss which is carried forward from the previous financial year.

2. Submit the details of the taxes and house rent collected from the let out property.

House Loan Information

Note: Payroll Calculation > Manage Person > Manage Calculation Card > Income Tax Deductions > Complete Investment Declaration > House Property and House Loan

1. Add the house loan information for the house property owned by the employee.

Field	Description
Lender's Name	Enter the name of the bank providing the house loan.
Lender's PAN	Enter the PAN of the banker (lender), which means the bankers PAN.
Lender's Address	Enter the address of the bank lending the house loan.
Purpose of Loan	Select one of the values from the list: <ul style="list-style-type: none">○ Purchase○ New construction○ Reconstruction or repairs
Loan Sanction Date	Select the loan sanctioned date from the calendar dialog box.
Loan Sanction Amount	Enter the loan sanctioned amount.
Value of Property	This is required for self occupied property.
Interest Amount	Enter the amount of interest paid in the current financial year.
Principal Amount	Enter the principal amount paid in the current financial year.
Pre-EMI Interest Amount Paid	Enter the pre EMI interest amount paid in previous financial years.
Joint loan	Select this checkbox if the loan is a joint loan.
Percentage of Claim	Enter the percentage of loan claimed if this is a joint loan. This field is disabled otherwise.

2. Submit the house loan information for the house property owned by the employee.

Add 80C Deductions

Declare the details of the various investments, which are considered for the employees' income tax computation in the payroll process.

Here are the various investments considered in Section 80C:

- Life Insurance Premium
- Public Provident Fund (PPF)
- Unit Linked Insurance Plan (ULIP)
- Sukanya Samriddhi Scheme
- Children Education Tuition fees
- National Saving Certificate (NSC)
- Infrastructure Bonds
- Mutual Funds
- Equity Linked Saving Scheme (ELSS)
- Term Deposit Amount

As a Payroll User, you can enter the details for any of the investment schemes applicable for the employee in the current financial year. The total values invested in the different schemes are summed up and considered for income tax computation.

Declare Investments in Section 80C

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > 80C Deductions

1. From the list, select **Deductions under 80C** and declare the invested amount in any of the schemes in section 80C as shown:

Field	Description
Life Insurance Premium	Enter the life insurance premium amount in the current financial year.
Public Provident Fund (PPF)	Enter the public provident fund amount.
Unit Linked Insurance Plan (ULIP)	Enter the unit link insurance plan amount.
Sukanya Samriddhi Scheme	Enter the life insurance premium amount.
Children Education Tuition fees	Enter the children tuition fees amount paid for the academic year.

Field	Description
National Saving Certificate (NSC)	Enter the amount invested in national saving's scheme in the current financial year..
Infrastructure Bonds	Enter the infrastructure bonds amount.
Mutual Funds	Enter the mutual funds amount.
Equity Linked Saving Scheme (ELSS)	Enter the amount invested in equity linked saving scheme.
Term Deposit Amount	Enter the amount invested in term deposits.

2. Submit the details of investments in section 80C.

Add Medical Insurance Premium

Add details of the medical insurance premium for self, dependents, and parents in section 80D.

As a payroll user, you can declare the medical insurance premium details for employees, dependents and parents, which needs to be paid for the financial year.

Add Medical Insurance Premium in Section 80D

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > 80D Medical Insurance Premium

1. Enter the medical insurance premium information.

Field	Description
Type of Insured Person	Select the type of the expense from the list:: a. Self and Family: includes self, spouse, or children b. Parents
Premium Amount	Enter the summed up premium amount for each insured person type, which means for self and family and parents will have the separate transaction during the declaration.
Preventive Health Checkup	Enter the summed up value for each insured person type.
Insured persons include a senior citizen	Select this checkbox if the insured person is a senior citizen. If you select this checkbox, the field Medical Expenditure is enabled.

Field	Description
Medical Expenditure	Enter the relevant medical expenditure incurred for senior citizens. Note: This attribute is displayed only when the Insured persons include a senior citizen checkbox is selected.

2. Submit the details.

Add Medical Treatment Expenses

Add details of the medical treatment expenses for physically handicapped dependent family members in section 80DD.

Add Medical Treatment for Disabled Dependents in Section 80DD

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > 80DD Medical Treatment for Disabled Dependents

- | Field | Description |
|-----------------------|---|
| Disability Percentage | Select the disability percentage from the list:

a. More than 40% and less than 80%
b. More than or equal to 80% |
| Treatment Amount | Enter the treatment amount. |

- 2.

Add Medical Treatment for Specified Diseases

Add details of the medical treatment for specified diseases in section 80DDB.

Add Medical Treatment for Specified Diseases in Section 80DDB

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > 80DDB Treatment for Specified Diseases

1. Enter the medical treatment expenses for specified diseases.

Field	Description
Amount	Enter the expenditure amount paid for the specified disease treatment.
Include a Senior Citizen (60 years old or above)	Select this checkbox if the medical expenses are for a senior citizen.

2. Submit the details.

Add NPS Contribution

Add the employee contribution to the National Pension Scheme(NPS) in the central government.

Section 80CCD (1) includes the employee contribution to National Pension Scheme (NPS). NPS is supported both for central and state government employees with fixed contribution rates. Employee contribution to other pension schemes in the central government are also considered.

This is considered during the income tax computation and needs to be within the overall ceiling of Rs.1.5 Lakhs. The employee's contribution is eligible for the tax deduction up to 10% of salary (Basic + DA) in section 80CCD(1).

Note: The total exemption for 80C + 80CCC + 80CCD(1) should not exceed the limit Rs.1,50,000.

Add National Pension Scheme Contribution

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Enter the additional NPS fund contribution details:

Field	Description
80CCD(1) NPS Contribution	<p>Enter the invested amount in section 80CCD (1B) NPS or other pension schemes notified by the central government.</p> <p>Note: Enter the total value if there are multiple investments made in this investment category.</p>

2. Submit the NPS contribution details.

Add Additional NPS Contribution

You can add the additional employee contribution to the National Pension Scheme(NPS) in the central government.

Section 80CCD (1B) includes Additional employee contribution toward NPS or other pension schemes in the central government are also considered.

This is considered during the income tax computation and needs to be within the overall ceiling of Rs.1.5 Lakhs. The employee's contribution is eligible for the tax deduction up to 10% of salary (Basic + DA) in section 80CCD(1).

Note: The total exemption for 80C + 80CCC + 80CCD(1) should not exceed the limit Rs.1,50,000.

Add Additional NPS Contribution

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Declare the additional NPS fund contribution in .

Field	Description
80CCD(1B) NPS Contribution	<p>Enter the invested amount in Section 80CCD (1B) Additional contribution NPS or other pension schemes notified by the central government.</p> <p>Note: Enter the total value if there are multiple investments made in this investment category.</p>

2. Submit the details of the pension fund investments.

Add Pension Fund Contribution

Add the employee contribution to the other pension schemes in the central government.

Section 80CCC includes the employee contribution to pension schemes other than NPS. This is considered during the income tax computation, and needs to be within the overall ceiling of Rs.1.5 lakhs.

Note: The total exemption for 80C + 80CCC + 80CCD(1) should not exceed the limit Rs.1,50,000.

Add Pension Fund Investments

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Enter the pension fund contribution:

Field	Description
80CCC Pension Fund Contribution	<p>Enter the invested amount:</p> <ul style="list-style-type: none">a. Section 80CCC: Pension schemes other than NPSb. Section 80CCD (1): NPS or other pension schemes notified by the central governmentc. Section 80CCD (1B): Additional contribution NPS or other pension schemes notified by the central government <p>Note: Enter the total value if there are multiple investments made in this investment category.</p>

2. Submit the details of the pension fund investments.

Add Donations for Research and Rural Development

Declare the details of the donations for research and rural development in section 80GGA, which are eligible for 100% tax deduction.

There's no upper limit to the amount one can donate to institutes which adhere to principles in this section and the donations can be in the form of cash, cheque or drafts.

Deductions is only allowed up to 2000 if the donations are made by cash.

Note: Deduction in section 80GGA isn't allowed if the employee has gross total income which includes income chargeable in the head **Profits and gains of business or profession**.

Add Donations for Research and Rural Development in Section 80GGA

Note: **My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA**

1. Enter the amount in **Donations for Research and Rural Development**

Field	Description
Amount	Enter the donation information.

2. Submit the donation details.

Add Donations to Political Party

Add the details of the donations to political party in Section 80GGC.

Section 80GGC of the Income Tax Act allows the deductions from the total income of an individual taxpayer for an employee's contributions toward electoral trust or political party.

This entire amount is eligible for tax deduction. The deduction isn't allowed if the donations are made in cash.

Add Donations to Political Party in Section 80GGC

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Enter the amount in **Donations to Political Party**.

Field	Description
Amount	Enter the donation amount paid to the political part or electoral trust.

2. Submit the details of the donations.

Add Permanent Physical Disability Info

Add the details of any permanent physical disability to avail tax exemptions in section 80U.

Declare the permanent physical disability details for an employee to avail the exemptions from the income tax in the section 80U.

Add Deduction for Permanent Physical Disability in Section 80U

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. As a Payroll User, from the home page navigate to **Payroll Calculation > Manage Person > Manage Calculation Card > Income Tax Deductions > Complete Investment Declaration > Deductions under Chapter VIA**.
2. Select **Permanent Physical Disability** from the list of values.

Enter the details as shown:

Field	Description
Disability Percentage	Select an option from the list:

Field	Description
	<ul style="list-style-type: none">a. More than 40% and less than 80%b. More than or equal to 80%
Amount	Enter the expenditure amount paid for the specified disease treatment.

3. Click **Submit**.

Add Interest on Higher Education Loan

Add the details of the interest for higher education loan availed as per Section 80E.

As a Payroll User, declare the interest on higher education loan for employees availing this benefit.

As an employee you can access the investment declaration page from the employee self service portal.

Add Interest on Higher Education Loan in Section 80E

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Enter the interest amount in **Interest on Higher Education Loan** :

Field	Description
Interest Amount	Enter the interest amount paid for the higher education loan availed.

Note: Employee can claim this exemption for loan availed for self, spouse and children. If multiple education loans are availed for self, spouse and children, you need to enter the total value of the interest amounts paid for the education loans.

2. Submit the higher education loan details.

Add House Rent Paid Details

Indicate whether the rent paid exemption needs to be considered in section 80GG here.

This is applicable if the house rent is paid by the employee, but HRA isn't paid by the employer in certain conditions.

Add Deductions for Rent Paid in Section 80GG

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Chapter VIA Deductions > Other deductions in Chapter VIA

1. Enter the details in **80GG Deductions for Rent Paid** :

Field	Description
80GG Deductions for Rent Paid	Select Yes if the relevant house rent details are furnished in the HRA section. Otherwise, there won't be any values considered in this section for exemption. Default option selected is No.

2. Submit the rent paid information.

Add Previous Employment Details

You can add the previous employment information only for new employees joining the organization in the middle of the financial year.

As a payroll user, you need to enter the details of salary and TDS in the previous employment for new employees. This is required to compute income tax accurately for the financial year. The following generic information is added along with the income, deduction and taxes data.

- Employer Name
- Employment Duration
- Previous Designation
- PAN of the previous employer
- TAN of the previous employer

Add Previous Employment Data

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Enter Previous Employment Details

1. Enter the details for the required attributes:

Field	Description
Name of Employer	Enter the name of the previous organization

Field	Description
Latest Previous Employment Start Date	Enter the start date of the latest previous employment
Latest Previous Employment End Date	Enter the end date of the latest previous employment
Last Designation held	Enter the last designation at the previous organization.
PAN of the Employer	Enter the PAN of the previous employer
TAN of the Employer	Enter the TAN of the previous employer
Gross Salary	Enter the gross salary amount
Income after Section10	Enter the income after section 10 deduction.
Transport Allowance	Enter the transfer allowance
Professional Tax	Enter the professional tax info.
Chapter VI Amount	Enter the total value of the Chapter VI deductions.
Section 80CCE Amount	Enter the amount of the section 80CCE .
Section 80CCD1B Amount	Enter the amount of the section 80CCD (1B) .

2. Enter the investment amount for all applicable sections in 80DD, 80GG, 80U, similar to the above steps.
3. Submit the information.

Review Summary and Select Tax Regime

Review Summary

Get a glance of all the investment information you've just declared or from the submitted documents of investment proof in the summary report.

You can get a synopsis of the submitted amount and declared amount in each section of the investment declaration page, with the employee personal information. You can review and verify the uploaded information, before and also after submitting the documents of investment proof declared for house rent, house property and loan information, Chapter VIA deduction information, and other income information.

As a payroll user, you can view the summary report from the employee calculation card, income tax TRU.

The employee can access the summary report from the employee self service portal.

Review Summary Report

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Review Summary

1. In the Review Summary page, view the submitted and declared amount in each section.
 - o House Rent Details
 - o House Property and House Loan Information
 - o Chapter VI A Deductions
 - o Other Income
2. Verify if the **Submitted Amount** is displayed accurately from the uploaded investment proof documents.
3. After you verify the information in each section, click **Submit**.

You can view the **Submitted Amount** and **Approved Amount** in each section of the summary report, after the Payroll Administrator verifies and approves the submitted documents of investment proof.

Select the Tax Regime

You need to select your preferred tax regime for the financial year within the defined window period for selecting the tax regime.

As a payroll user or an employee, you need to select the required tax regime. This timeline is available only at the beginning of each financial year. The tax regime can be the old or new tax regime, that forms the basis for the investment declaration flow. The tax regime needs to be maintained both for the regular employees and new hires.

Note: For first time setting, you need to save the Income Tax TRU association for an employee, before setting the tax regime.

As an employee you can select the tax regime from the Employee Self Service portal (Me > Pay > Income Tax > Investment Declaration).

Here's how you can set the tax regime for an employee:

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Compare and select tax regime

1. Select the **New Tax Regime** or **Old Tax Regime**.
 - o New Tax Regime is limited to a fewer sections in investment declaration such as declaring the house property, house loan, and other income information.
 - o Old Tax Regime includes declaring the house rent, house property, house loan, deductions in Chapter VI A and other income information.
2. Save the tax regime selection.

Complete Proof Submission

Upload Documents of Investment Proof

Review and upload the documents of investment proof, for each section where you've declared the invested amount in the proof submission page.

Towards the end of the financial year, you need to submit the documents of proof for the declared investments. This can be done only within the window period for investment proof submission. You need to upload scanned copies of the documents of investment proof, in different sections in the proof submission page.

Upload Documents of Investment Proof

Note: **My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Proof Submission**

1. In the Upload Investment Proofs page, expand any one of the sections and click **Add** to add the proof details.
 - o House Rent Details
 - o House Property and House Loan Information
 - o Chapter VI A Deductions
 - o Other Income
2. Select the required section
3. Verify the added information and click **Submit**.
4. In Proof Documents area, drag the scanned copies of the documents of investment proof relevant for that section to upload them.
5. Click **Drag files here or click to add attachment > Add Files** to upload the scanned investment proof documents from your computer.
Verify if the correct documents are uploaded.
6. Click < to go back to the Upload Investment Proofs page.
7. Expand the next section to upload documents and repeat steps 4 to 7 to upload the scanned documents.

Review Summary

Get a glance of all the investment information you've just declared or from the submitted documents of investment proof in the summary report.

You can get a synopsis of the submitted amount and declared amount in each section of the investment declaration page, with the employee personal information. You can review and verify the uploaded information, before and also after submitting the documents of investment proof declared for house rent, house property and loan information, Chapter VIA deduction information, and other income information.

As a payroll user, you can view the summary report from the employee calculation card, income tax TRU.

The employee can access the summary report from the employee self service portal.

Review Summary Report

Note: My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Investment Declarations > Review Summary

1. In the Review Summary page, view the submitted and declared amount in each section.
 - o House Rent Details
 - o House Property and House Loan Information
 - o Chapter VI A Deductions
 - o Other Income
2. Verify if the **Submitted Amount** is displayed accurately from the uploaded investment proof documents.
3. After you verify the information in each section, click **Submit**.

You can view the **Submitted Amount** and **Approved Amount** in each section of the summary report, after the Payroll Administrator verifies and approves the submitted documents of investment proof.

View Income Tax Computation Sheet

You can use the income tax computation sheet to view the summary of income tax(IT) calculation for the current financial year based on the earnings, allowances, perquisites, other income, and more.

As an employee, you can also view the applicable chapter VIA deductions and annexure of the IT computation sheet, for more details.

Generate and View IT Computation Sheet

1. Run the payroll process with appropriate values for the following parameters:
 - o Effective Date
 - o Payroll Period
 - o Payroll ID
2. Click **Generate IT Computation Sheet**.
3. On successful completion of the process, navigate to **Person > Person and Employment > Document of Records** to view the IT computation sheet.

Complete Proof Verification and Approval

Verify and Approve the Documents of Investment Proof

Verify and approve all the uploaded documents of investment proof for the current financial year.

As a payroll administrator or payroll user, you need to verify and approve all the submitted documents of investment proof for the employee's income tax computation.

To upload the documents of investment proof, follow these steps:

Note: **My Client Groups > Person Management > Search employee > Calculation Card > Statutory Deductions > Income Tax > Proof Verification and Approval**

1. Click **Proof Verification and Approval**.
2. View the uploaded proofs in any of the sections:
 - House Rent Information
 - House Property and Loan Information
 - Chapter VIA Deductions
 - Other Income.
3. As an employee, the proof verification statuses visible are: Partially Verified, Yet to Verify, and Verified.
 - Yet to Verify: If the status of all sections indicate **Yet to Verify**, the overall status is **Yet to Verify**.
 - Partially Verified: If any one of the sections has the status **Yet to Verify**, the overall status displays as **Partially Verified**.
 - Verified: If all the sections have status **Verified**, the overall status is **Verified**.
4. The record level statuses are: Verified and approved, Verified and rejected, and Yet to verify.