

ALLAHABAD BANK
Personnel Administration Department
Head Office: 2, Netaji Subhas Road, Kolkata – 700001

Instruction Circular No.14782/PA/2016-17/66

Date:02.01.2017

To All Branches and Offices

CIRCULAR

Deduction of Tax at Source from Pension/Family Pension under ABEP-95 for the current financial year 2016-17 (AY 2017-18) –vis-à-vis-Amendment of Declaration Form and Extension of Date of Submission of declaration/proof of Investment/Payment

Attention is drawn to Head Office Instruction Circular No.14410/PA/2016-17/22 dated 08.07.2016 wherein the detailed guidelines on deduction of Tax at source from Pension/Family Pension under ABEP-95 for the current financial year 2016-17 (AY 2017-18) has been provided.

In the view of suggestions received from the pensioners regarding inclusion of more options of investment in declaration form (Annexure-'A') & extension of date for submission of declaration & proof of investment/payment, the declaration form has since been revised (marked as Revised Annexure-A) and the last date of submission of declaration and proof of investment /payment has been extended to 15th February 2017 instead of 5th January 2017 as circularized earlier.

1. Action points for pensioners:-

1.1 The pensioners/family pensioners are advised to submit the declaration form regarding investment/payment as per Revised Annexure-A and the self attested photo copies of proof of investment/payment at the branches latest by 15th February 2017. The pensioners may submit only the declaration form (Revised Annexure-A) now, however they shall again submit the same along with self attested photo copies of proof of investment/payment at the branches latest by 15th February 2017. It is needless to mention that they shall show the original proof of investment/payment to the branch official for their authentication.

1.2 Those who have already submitted the proof of investment/payment in response to earlier circular they are not required to submit the same again. However, if they want to revise the declaration submitted earlier, they shall submit the Revised Annexure-A and self attested photo copies of proof of investment/payment within the stipulated date as mentioned above.

1.3 In case any pensioner/family pensioner after submitting the declaration, does not submit proof of investment/payment within the extended stipulated period (i.e. 15.02.2017) or submits proof of investment/payment of lesser amount submitted in declaration in that case the income tax will be calculated accordingly taking into account the actual proof of investment/payment and the same shall be deducted from the pension payable for the month of February and March 2017. In case no proof of investment/payment is submitted

within the extended stipulated date i.e. 15.02.2017 then the declaration submitted shall not be taken into consideration and income tax will be calculated on the pension amount as if no declaration has been submitted.

2. Action points for Branches:-

2.1 The branch on receipt of the declaration in revised format will feed the information in the Staff Pension module as advised earlier by visiting app store in the Intranet site/accessing directly from http://10.11.24.52:8092/Staff_Pension/Login.aspx. The branch official will duly verify the authenticity of the self attested photo copies of proof of investment/payment from the original and will ensure that the proof submitted is in conformity with the declaration submitted. Branch official will put seal and signature on the photo copies of proof after verification.

2.2 The branch official/clerk (other than the one who has verified the authenticity of the photocopies) will scan the declaration and self attested photo copies of proof of investment/payments and shall prepare a single PDF file having size not more than 2 MB & upload the same in the upload section of Staff Pension Module latest by 17th February 2017. The branch should invariably enter the declaration and upload the same along with the proof of investment/payment before the due date.

2.3 The branch official shall invariably upload the already received proof of investment/payment as per declaration submitted in terms of HOIC No.14410/PA/2016-17/22 dated 08.07.2016 before the stipulated date. However, if some pensioners/family pensioners again submit the declaration as per revised format it should be suitably amended in the system within the stipulated date.

2.4 The declaration form (Revised Annexure-'A') submitted by the pensioners/family pensioners upto 25.01.2017 should be invariably entered in the system on the same date. However, the declaration submitted by the pensioners after 25.01.2017 should be accepted but that will be entered in the system after 31.01.2017 and upto 15.02.2017.

2.5 The guidelines along with screen shots for making entries as per revised format and uploading of declaration and proof of investment/payment in to the Staff Pension Module is given in Annexure-B.

2.6 It is reiterated that the branches shall retain the declaration/proof of investment/payment along with the copies of PAN at their end and in NO case that will be forwarded to Head Office.

2.7 Other contents as circularized earlier shall remain unchanged.

A copy of this instruction circular may be displayed in the notice board of the branches and offices for information of all concerned.

A copy of this instruction circular is also available in the "Retiree Corner" in the Bank's website (www.allahabadbank.in).

Hindi version of the circular follows.

(B N Sahoo)
Asst. General Manager (HR)

REVISED ANNEXURE-'A'

Important: This declaration form is to be submitted to the branch only. In no case it will be sent to Head Office.

The Chief Manager
Terminal Dues Section,
Personnel Administration Department,
Head Office, Kolkata

(Through _____ Branch)

INVESTMENTS/PAYMENTS WILL BE MADE BEFORE 15.02.2017

Dear Sir,

Re: FINANCIAL YEAR 2016-17
Sub: DEDUCTION OF INCOME TAX

I furnish hereunder the particulars for the purpose of deduction of Income Tax at source under section 192 of the Income Tax Act, 1961 from my pension Income during the financial year 2016-17 i.e. from 01.04.2016 to 31.03.2017.

1. PF No. of the retired employee/officer

2. Full Name of Pensioner/Family Pensioner (in block letters):-----

3. Gender (Gender of the pensioner who actually receives the Pension) :

M	F
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4. Date of Birth (in DD/MM/YYYY format)

D	D	M	M	Y	Y	Y	Y
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5. Mobile No. :

6. PAN No. (PAN No. of the Pensioner who actually receives the Pension. Please submit a self-attested copy of PAN Card) :

7. Residential Address : -----

8. Interest accrued on self occupied residential Housing Loan :Rs. _____

9. Interest on Education Loan : Rs. _____

10. Mediclaim U/S 80D: Rs. _____

11. Amount paid / to be paid during the financial year 2016-2017 in respect to the following:

Sl. No.	Types of investment under Section 80C	Amount in Rs.
1	PF/VPF	
2	Public Provident Fund(PPF)	
3	Tuition fees (Max. for 2 Children) excluding any payment towards any development fees or donation or payment of similar nature whether at the time of admission or thereafter to any University, College, School or other educational Institution for the purpose of full time education of the individual, child, wife or husband as the case may	
4	Life insurance premium/Postal life insurance premium (Please furnish details in the separate table as below in point No.10)	
5	Term deposit under 'Tax Savings Scheme" with a scheduled Bank	

Annexure to HOIC No.14782/PA/2016-17/66 dated 02.01.2017

6	5 Years National savings certificate(s) - VIII issue	
7	NSC Interest	
8	Housing Loan Installments	
9	U.L.I.P	
10	Equity/Mutual Fund	
11	Retirement Benefit Plan	
12	Sr.Citizen Scheme	
13	Any other scheme under 80C not listed above (Please write the details)	

12.Details of Life insurance premium/Postal life insurance premium

Sl.No.	Policy No.	Sum Assured	Dt.of Premium	Amt. Of Premium Per Annum
TOTAL :				

DECLARATION

1. The particulars given above are true to the best of my knowledge and belief.
2. I undertake to make the investments/payments as mentioned above and shall submit proof thereof (along with self attested photo copies of the investments/payments) to the branch by 15th February 2017 where I have submitted this declaration.

Place:

Yours faithfully,

Date:

(Signature in full)

Name:

PF No of Retired Employee.:

For Office Use		
	Sr. Manager/Manager/Officer who has verified the photocopies of the investment/payments from the original	Officer/clerk who has entered the data of the investment/payments in the system
Name		
Employee ID		
Designation		
Date of verification/entry in the system		
Signature		

Staff Pension : User Manual

Some new fields have been added in the pre-existing declaration form of Staff Pension application as shown below. Branches are advised to take note of the changes and follow the new format for Declaration submission of Pensioners.

The screenshot displays the 'Declaration' tab of the Staff Pension application. The user is logged in as 'ABNEENDRA KUMAR' with ID '110 (210032)'. The financial year is set to '2016 2017'. The form shows various fields for declaration, including:

Code	Description	Qualifying Amt.	Max Limit
80C	Term Deposit under TaxSaving		
80C	NSC		
80C	NSC Interest (5 Years)		
80C	HL Installment		
80C	U.I.T.P.		
80C	Equity/Mutual Fund		
80C	Retirement Benefit Plan		
80C	Sr. Citizen Scheme		
80C	Any other scheme under 80C		
Total U/S 80C			150000
80D	Medical Insurance Premium		
80E	Interest on Education Loan		
Total Under VI-A			
Taxable Income			
Rebate U/S 87A		0	5000

A red arrow points from a text box on the right to the new fields (U.I.T.P., Equity/Mutual Fund, Retirement Benefit Plan, Sr. Citizen Scheme, Any other scheme under 80C) in the table. The text box contains the text: 'New fields added in Declaration form'.

A new feature has been added recently in the Staff Pension application to upload the scanned copies of declarations and investment certificates of Pensioners (WARNING: This does not include the Life Certificates/Non-employment Certificates/Non-marriage Certificates of Pensioners). The guidelines to be followed while using the 'Upload' feature is as mentioned below:

1. Only PDF files can be uploaded.
2. Only 1 file per Pensioner is allowed.
3. Scan all documents (as per declaration) of a Pensioner in a single PDF file.
4. Maximum File Size allowed is 2MB.

The screenshot shows a web application interface with a blue header and a light green main content area. The header contains a logo and navigation tabs: Home, Declaration, Certificates, Processing, and Reports. Below the header, the user's name 'ABNEENDRA KUMAR' and ID 'HO (210032)' are displayed. A search bar is present with a dropdown for 'Financial Yr' set to '2016-2017' and a search criteria field 'Search By PF No. OR Acc No. OR Name' with a 'Go' button. Below the search bar, three status indicators are shown: 'Current Month Gross: 0', 'Gross Paid Till Date: 0', and 'Full Yr Gross: 0'. The main content area has a tabbed interface with 'Basic Details', 'Declaration', 'Summary', and 'Upload' tabs. The 'Upload' tab is active and contains a box with the following text: 'Checkpoints for Uploading Investment Certificates: 1. Only PDF file can be uploaded 2. Only 1 file per Pensioner is allowed 3. Scan all documents (as per declaration) of a Pensioner in a single PDF file 4. Maximum File Size allowed is 2MB'. Below this box, there is a 'Select File' button, a 'Browse...' button, the text 'No file selected.', and an 'Upload' button. A red arrow points from a callout box on the right to the 'Upload' button. The callout box contains the text 'Select file and upload'. At the bottom of the page, there is a footer with the text 'Copyright ©Project Management Office, Kolkata'.

Home Declaration Certificates Processing Reports

ABNEENDRA KUMAR HO (210032)

Financial Yr: 2016-2017 Search By PF No. OR Acc No. OR Name Go

Current Month Gross: 0 Gross Paid Till Date: 0 Full Yr Gross: 0

Basic Details Declaration Summary Upload

Checkpoints for Uploading Investment Certificates:

1. Only PDF file can be uploaded
2. Only 1 file per Pensioner is allowed
3. Scan all documents (as per declaration) of a Pensioner in a single PDF file
4. Maximum File Size allowed is 2MB

Select File Browse... No file selected. Upload Delete View

Select file and upload

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