



FORM 12BB

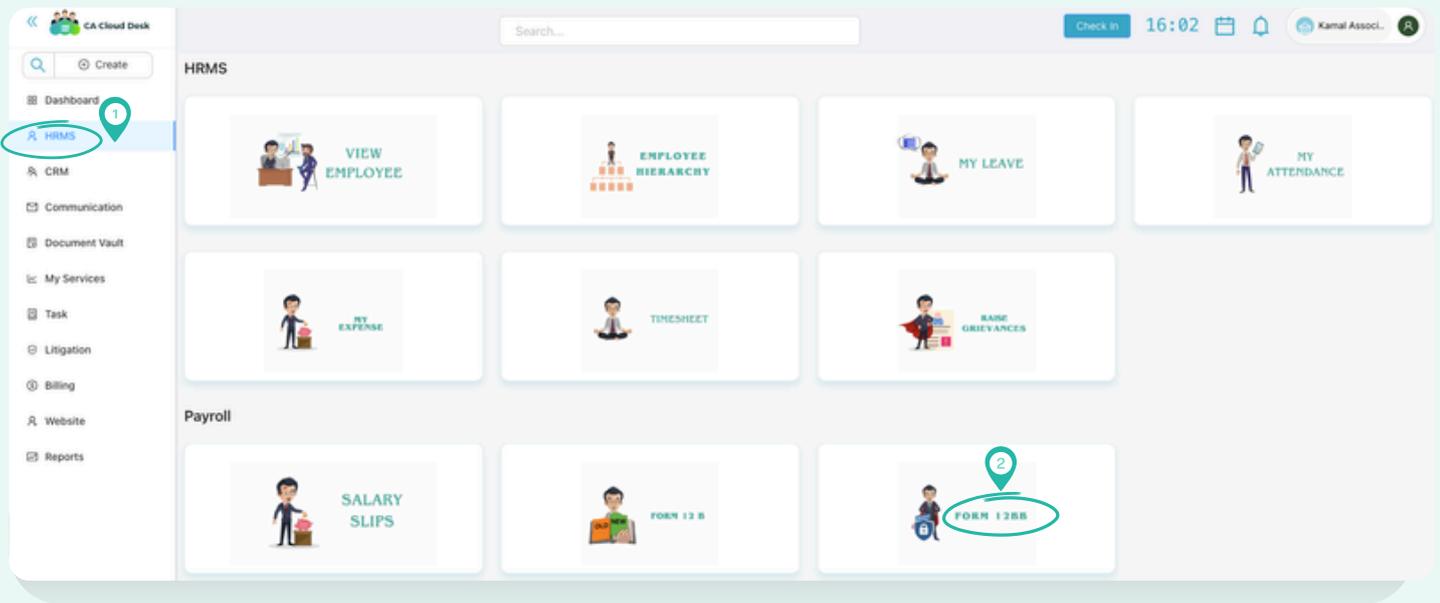
CA CloudDesk



Go to Dashboard, select HRMS

Login to CA CloudDesk and open the Dashboard then select HRMS

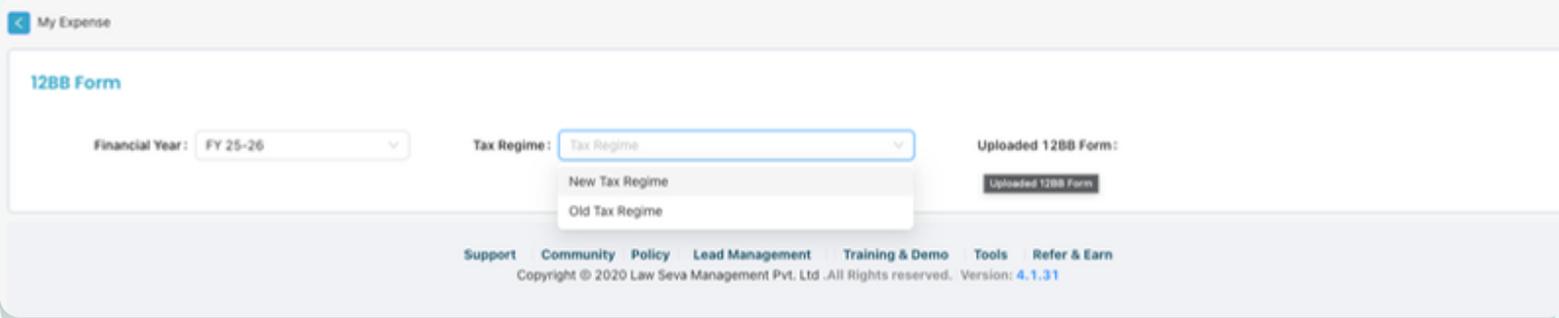
- 1 Click on HRMS.
- 2 Click on Form 12 B



Form 12BB overview

On the Form 12BB screen you can set:

- **Financial Year** - e.g. FY 25-26 (dropdown).
- **Tax Regime** - Choose New Tax Regime or Old Tax Regime from the dropdown. This determines how your tax and deductions are calculated.
- **Uploaded 12BB Form** - Once saved, you can upload or view the 12BB declaration here.



Tax Regime : Old Tax Regime

Old Tax Regime has four sections shown in the progress stepper: House Rent Allowance, Deduction Of Interest, Deductions Under Chapter VI-A, Remarks & Declarations. Complete each section in order.

12BB Form

Financial Year: Tax Regime: Uploaded 12BB Form:

House Rent Allowance Deduction Of Interest Deductions Under Chapter VI-A Remarks And Declarations

A.) House Rent Allowance

In the House Rent Allowance section you enter monthly rent details and annual summary, then upload supporting documents.

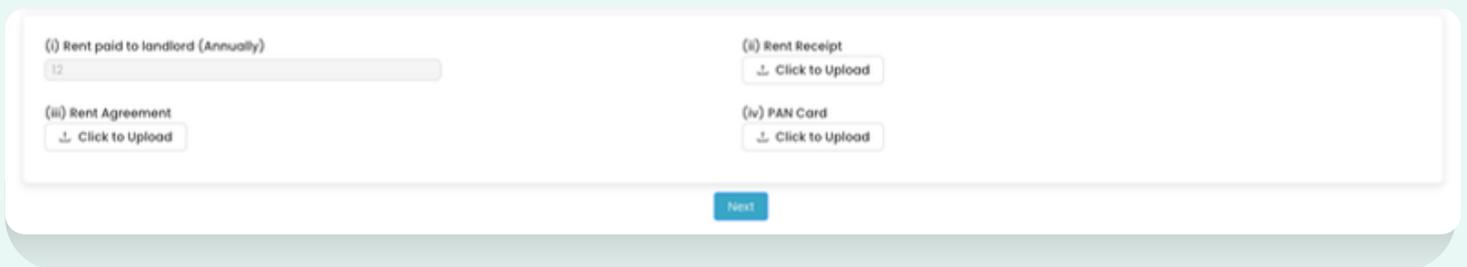
For each month from Apr-2025 to Mar-2026, fill the following columns:

- **(1) Rent paid to the landlord (Rs.)** - Amount of rent paid in that month.
- **(2) Name of the landlord** - Full name of the landlord.
- **(3) Address of the landlord (Rented Property Address)** - Full address of the rented property.
- **(4) PAN Or Aadhaar of the landlord** - Landlord's PAN or Aadhaar number.

House Rent Allowance				
	(1). Rent paid to the landlord (Rs.)	(2). Name of the landlord	(3). Address of the landlord (Rented Property Address)	(4). PAN Or Aadhaar of the landlord
Apr-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
May-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Jun-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Jul-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Aug-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sep-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Oct-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Nov-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dec-2025	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Jan-2026	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Feb-2026	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mar-2026	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Annual rent and document uploads

- (i) **Rent paid to landlord (Annually)** - Enter the total rent paid for the financial year in the input field.
- (ii) **Rent Receipt** - Use Click to Upload to attach rent receipt(s) or supporting proof.
- (iii) **Rent Agreement** - Use Click to Upload to attach the rent agreement.
- (iv) **PAN Card** - Use Click to Upload to attach the landlord's PAN card (or acceptable proof).



The screenshot shows a form with four sections for document uploads:

- (i) Rent paid to landlord (Annually): A text input field containing the number '12'.
- (ii) Rent Receipt: A button labeled 'Click to Upload'.
- (iii) Rent Agreement: A button labeled 'Click to Upload'.
- (iv) PAN Card: A button labeled 'Click to Upload'.

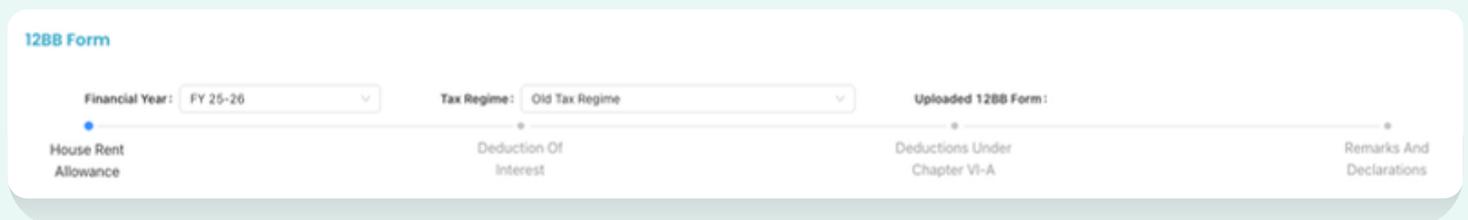
A 'Next' button is located at the bottom center of the form.

B.) Other sections

After House Rent Allowance, complete:

- **Deduction Of Interest** - Enter interest on home loan or other eligible interest claims as per the form.
- **Deductions Under Chapter VI-A** - Enter deductions under section 80C, 80CCC, 80CCD(1), 80D, 80DD, 80DDB, 80E, 80G, etc., as applicable.

Use Next and Previous to move between sections. When all sections are done, you will reach Remarks And Declarations.



The screenshot shows the '128B Form' progress bar with the following details:

- Financial Year: FY 25-26
- Tax Regime: Old Tax Regime
- Uploaded 128B Form: (indicated by a dot on the progress bar)

The progress bar has four stages: House Rent Allowance, Deduction Of Interest, Deductions Under Chapter VI-A, and Remarks And Declarations. The first three stages are marked with dots, indicating they are completed.

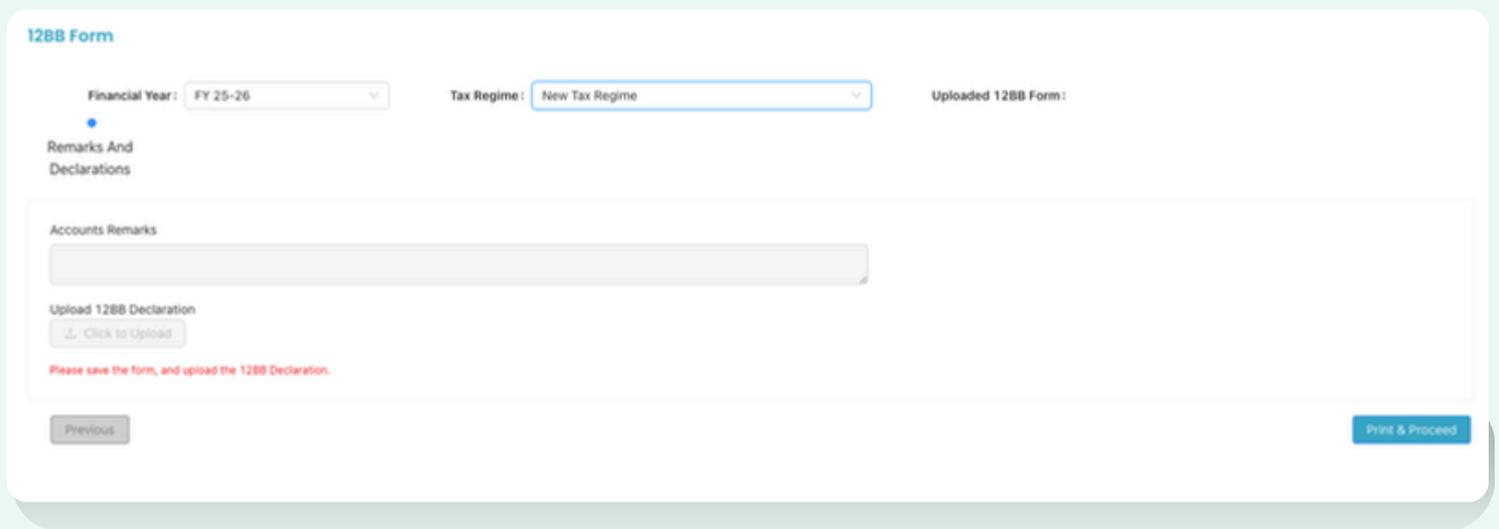


Remarks and Declarations

In the final step, add any accounts remarks and upload the signed 12BB declaration.

Tax Regime :New regime

If you select New Tax Regime, you have to fill the following details.



The screenshot shows the '12BB Form' interface. At the top, there are two dropdown menus: 'Financial Year' set to 'FY 25-26' and 'Tax Regime' set to 'New Tax Regime'. To the right, there is a label 'Uploaded 12BB Form:'. Below these is a section titled 'Remarks And Declarations' with a sub-section 'Accounts Remarks' containing a large text input field. Underneath is an 'Upload 12BB Declaration' section with a 'Click to Upload' button. A red message below the upload button reads: 'Please save the form, and upload the 12BB Declaration.' At the bottom left is a 'Previous' button, and at the bottom right is a 'Print & Proceed' button.

Remarks and declaration fields

- **Accounts Remarks** - Optional text for internal or accounts use.
- **Upload 12BB Declaration** - Use Click to Upload to attach the signed Form 12BB declaration. The form may show: "Please save the form, and upload the 12BB Declaration." Save the form first, then upload.
- **Print & Proceed** - Click to print and complete the process. Use Previous if you need to go back and edit.