

GOVERNMENT OF INDIA (भारत सरकार)
Ministry of Railways (रेल मंत्रालय)
Railway Board (रेलवे बोर्ड)

File No. PC-VII/2020/HRMS/16

New Delhi, dated: 14.12.2020

**The General Manager/CAOs(R),
All India Railways & Production Units,
(As per mailing list)**

Sub: User Manual for PF Loan & Advance Module of HRMS

PF Loan & Advance module of HRMS was launched by CRB & CEO for use across all offices of Indian railways. Online training for operation of the PF Loan & Advance Module was also provided by CRIS to all the employees.

2. Now, in order to serve as a guide and ready reckoner, a User Guide and a detailed User Manual is enclosed below and have also been uploaded on the website of Indian Railways at the following location:

<http://www.indianrailways.gov.in/railwayboard/> → About Indian Railways → Corporate Overview → Directorates → Pay Commission → Pay Commission-VII

3. It is requested that the User Guide and User Manual be circulated widely among the staff in the respective Railways for smooth and timely implementation of HRMS.

**Encl: 1. User Guide on PF Advance Module
2. User Manual on PF Advance Module**



(JAYA KUMAR G)
Deputy Director/ Pay Commission-VII & HRMS
Railway Board

File No. PC-VII/2020/HRMS/16
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4. The Director General, RDSO, Lucknow,
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11. The Managing Directors RITES, IRCON, CRIS, IRFC, CONCOR, RVNL, DFCCIL, KRCL.
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21. The Editor, 'Bhartiya Rail'.
22. The Editor, 'Indian Railways'.
23. The Chairman, Passenger Services Committee.
24. The Chairman, Passenger Amenities Committee.
25. The C.A.O. (A) MTP (G)/ Mumbai (B) MTP (G)/Chennai.
26. Office of the Chief Project Administrator (Telecom), Indian Railway Central Organisation for Telecom Consultancy, Shivaji Bridge, New Delhi.
27. The Chief Mining Advisor, Ministry of Railway, Dhanbad.
28. The C.A.O. (Const.), Central Railway, Mumbai.
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(Jaya Kumar G)
Deputy Director, Pay Commission-VII
Railway Board

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6. All India O.B.C. Railway Employee's Federation, Room No. 48, Rail Bhawan
7. The Secretary General, AIRPFA, Room No. 256-D, Rail Bhawan.
8. The Secretary General, Indian Railway Promotee Officers Federation
9. The Secretary, Railway Board Secretariat Service, Group 'A' Officers Association. Room No. 402, Rail Bhawan.
10. The Secretary, RBSS Group 'B' Officers Association.
11. The Secretary, Railway Board Ministerial Staff Association.
12. The Secretary, Non-Ministerial Staff Association (Railway Board).



For Secretary, Railway Board

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PF Loan Application

Employee

- Go to <https://hrms.indianrail.gov.in/HRMS>
- Enter User Id, Password and OTP.
- Go to Loan and Advances -> My PF Loan Applications menu.
- Click on “New Application” Button.
- Employee’s basic, bank details, last PF loan details and PF balance are shown.
- Employee selects PF loan type, withdrawal reason, enter amount, remarks and submit.

PF Loan Dealing Clerk/Verifying Authority/Accepting Authority

- Click on Loan and Advances ->PF Loan Applications menu
- List of Applications are shown.
- Click on Application number.
- PF loan application details are shown.
- Enter remarks and press forward/Reject button.
- Accepting Authority digital sign application and accept. On accepting a PDF file is generated and digitally signed. Same Signed PDF file along with application data is sent to account dept through IPAS system.
- On every change of status of PF Loan application, a SMS is sent on employee mobile number.

IPAS system process

- Whenever application’s status is changes in IPAS system, same is reflected in HRMS application in application list in Loan and Advances -> My PF Loan Applications menu.

*****END OF DOCUMENT*****

PF Loan and Advances- User Manual

❖ For Unit Admin

1. Go to HRMS application <http://10.77.48.16:8080/HRMSDEV/> and login using HRMS ID & Password
2. Enter OTP as 31120.

A. PF Loan Dealing Clerk, PF Loan Verifying and PF Loan Accepting Authority creation

1. If the user is not already created for HRMS application, go to *Admin Section*>*Create User*.
2. Enter the *IPAS ID/HRMS ID* of the user and click on 'Go' button
3. Enter the mobile number of the employee and select user type as 'LDC'/'LVA'/'LAA' for PF Loan Dealing Clerk, PF Loan Verifying Authority, PF Loan Accepting Authority respectively from the drop-down and click on 'Create User'.

The screenshot shows the 'Create Users' interface in the IR-HRMS system. The form is titled 'Create Users' and includes a header instruction: 'To 'Update Mobile Number' or 'Reset Password' for user, enter employee HRMS/User ID and click on 'Go''. The form contains several input fields: 'IPAS/HRMS ID *' with a 'Go' button, 'User ID *', 'Employee Name *', 'Mobile number *' (with the value '9999999999'), 'HRMS ID *', 'Employee Number', 'Nickname', and 'User Type *' (a dropdown menu with '--Please Select--'). Below the form are four buttons: 'Create User', 'Reset Password', 'Update Mobile', and 'Reset'. At the bottom right, there is a 'Load User List' button. The left sidebar shows the 'Admin Section' menu with 'Create User' highlighted.

4. If user already exists in HRMS application, Go to *Admin Section* >*Change Role*.
5. Add role of 'LDC'/'LVA'/'LAA' for PF Loan Dealing Clerk, PF Loan Verifying Authority, PF Loan Accepting Authority respectively to user.

B. LDC, LVA, LAA mapping

1. Login to HRMS application with Unit Admin's ID.
2. Click on *Loan & Advances* > *PF Loan Authority Matrix*
3. Select Loan Dealing Authority, Loan Verification Authority and Loan Acceptance Authority from the list for the respective unit and click on 'Submit' button.

Home / Loan & Advance / PF Loan Authority Relationship

PF Loan Authority Relationship

Select PF Loan Verification & PF Loan Acceptance Authority for the PF Dealing Clerk for NORTHERN RAILWAY/ HL.

Sr. No.	PF Loan Dealing Clerk	PF Loan Verification Authority	PF Loan Acceptance Authority
1	AJAY SINGH RAWAT (ER/FIO)	ANIL KUMAR (DM/WVEC)	AJAY KAKKAR (THO/FW)
2	ALAM SINGH (RCWDGM)	ANIL KUMAR (DM/WVEC)	AJAY KAKKAR (THO/FW)
3	ANIL KUMAR MAHTO (SNZDQL)	ANIL KUMAR (DM/WVEC)	AJAY KAKKAR (THO/FW)

Submit Reset

C. Employee assignment to LDC

1. Login To HRMS application with Unit Admin's ID
2. Click on *Loan & Advances* > *Assign Employees*
3. Select PF Loan Dealing Authority from the list to whom Employees needs to be assigned and click on 'Go' button.

Home / Loan & Advances / Assign Employees

Assign Employees

Select the PF Loan Dealing Authority:

PF Loan Dealing Authority * -- Please select -- Go

UNIT: NORTHERN RAILWAY/ HQ

Click to Toggle between Bulk Assignment and One to One assignment Bulk

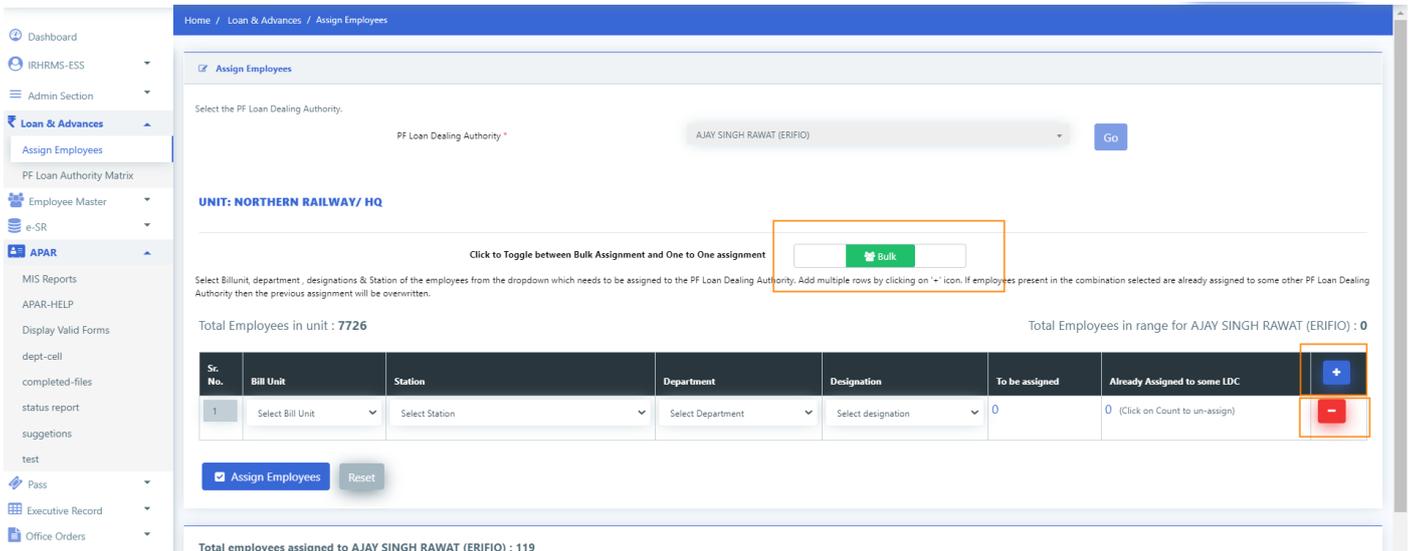
Select Billunit, department, designations & Station of the employees from the dropdown which needs to be assigned to the PF Loan Dealing Authority. Add multiple rows by clicking on '+' icon. If employees present in the combination selected are already assigned to some other PF Loan Dealing Authority then the previous assignment will be overwritten.

Total Employees in unit : 7726 Total Employees In Range for LDC : 0

Sr. No.	Bill Unit	Station	Department	Designation	To be assigned	Already Assigned to some LDC	
1	Select Bill Unit	Select Station	Select Department	Select designation	0	0 (Click on Count to un-assign)	+ -

Assign Employees Reset

4. **For bulk assignment**, select the bill unit, station, department & designation combination. The count of to be assigned employees and those employees which are already assigned to some LDC will be shown. Add more rows by clicking on '+' and remove rows by clicking on '-' icon

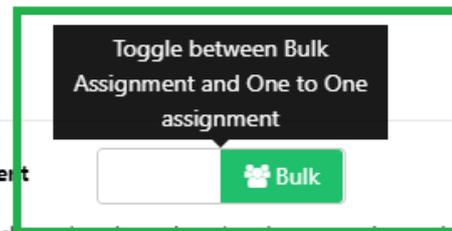


5. Click on 'Assign Employees' button to assign selected employees to the LDC.

6. For Assignment based on employee ID, click on the icon shown in below image

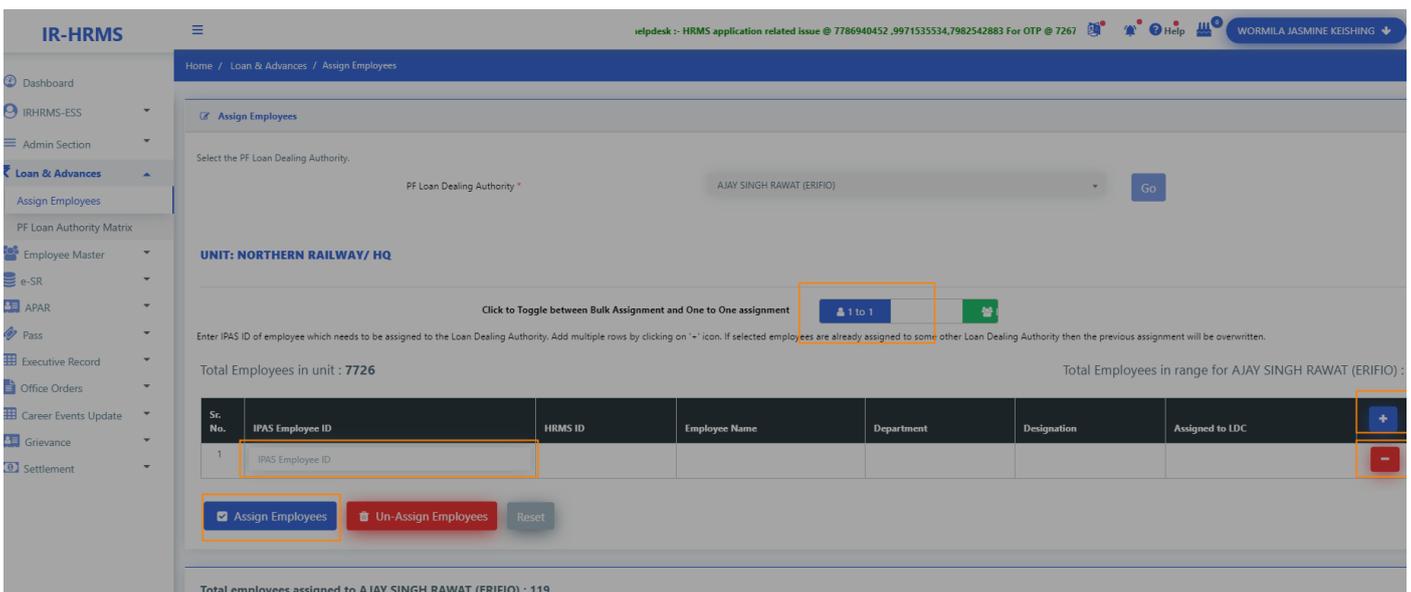
UNIT: JODHPUR WORKSHOP/ WSH

Click to Toggle between Bulk Assignment and One to One assignment



Select Billunit, department & designations of the employees from the dropdown which needs to be assigned to the PF Issuing Authority. Add multiple employees present in the combination selected are already assigned to some other Issuing Authority then the previous assignment will be overwritten.

7. Enter the HRMS ID/IPAS Employee ID of the employee and press 'Tab' key



8. Add more rows by clicking on '+' and remove rows by clicking on '-' icon.

9. Click on 'Assign Employees' button to assign the employees to the selected LDC and 'Unassign Employees' button to unassign employees from the LDC(if any assigned to them).

Sr. No.	IPAS Employee ID	HRMS ID	Employee Name
1	IPAS Employee ID		

Assign Employees
 Un-Assign Employees

Note: If employee who is being assigned to a LDC is already assigned to some other LDC, then the previous assignment will be overwritten automatically. There is no need to first unassign the employee from the current LDC and then assign to new LDC.

10. To see the list of all employees assigned to LDC, click on 'Load List' button. List of all assigned employees will be fetched.

Total employees assigned to BASANT SINGH PURBIA (OOLUZR) : 189

List of employees assigned to Pass Issuing Authority: BASANT SINGH PURBIA (OOLUZR)

Billunit	IPAS ID	HRMS ID	Employee Name	Department	Designation	Railway Unit
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11. To unassign all employees from LDC, click on 'Unassign All'. All the employees will be removed from selected LDC.

Assign Employees
 Un-Assign Employees

Total employees assigned to AJAY SINGH RAWAT (ERIFIO) : 119

List of employees assigned to Loan Dealing Authority: AJAY SINGH RAWAT (ERIFIO)

Click to un-assign all assigned employees of LDC

Search:

❖ For PF Applying Employee

1. Login To HRMS application with Employee's ID
2. Click on Loan & Advances > My PF Applications
3. Click on New Application Button to apply for PF Loan or Click on Status button to update the in Draft or rejected application if any.

4. Fill all the mandatory fields and upload the document justifying the PF Loan Withdrawal Reason.

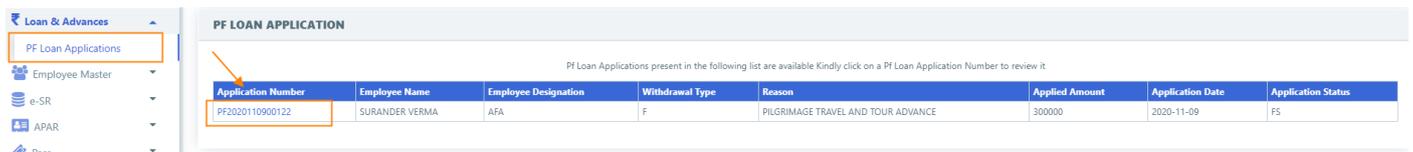
5. Click on submit Button.
6. Enter the OTP as 20131.
7. Click ok.

After successful submission the Application Number gets generated.

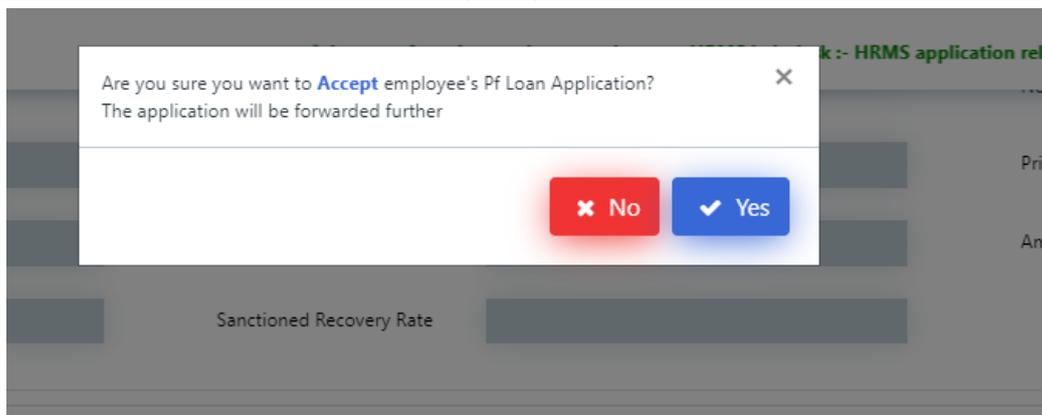
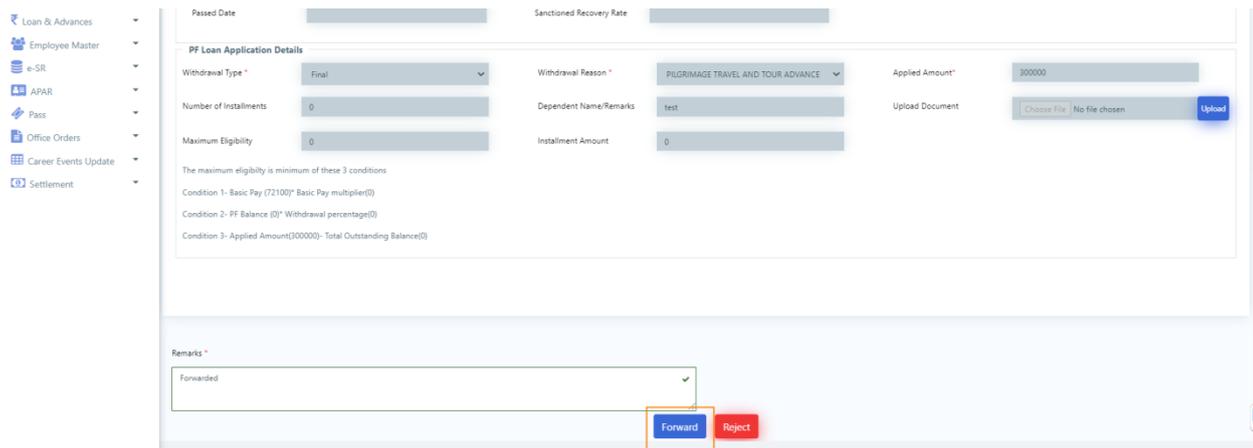
❖ For PF Loan Dealing Clerk

1. Login To HRMS application with PF Loan Dealing Clerk's ID

2. Switch user role to LDC, if having multiple roles.
3. Click on *Loan & Advances > PF Loan Applications*
4. Click on the application number to open the applied application details.



5. Check for the details filled, accordingly put remarks and forward or reject the application by clicking on the Forward or Reject button respectively.



❖ For PF Loan Verification Authority

1. Login to HRMS application with PF Loan Verifying Authority's ID.
2. Switch user role to LVA , if having multiple roles.
3. Click on *Loan & Advances > PF Loan Applications*
4. Click on the application number to open the applied application details.

PF Loan Application Details

Withdrawal Type * Withdrawal Reason * Applied Amount *

Number of Installments Dependent Name/Remarks Upload Document

Maximum Eligibility Installment Amount

The maximum eligibility is minimum of these 3 conditions

Condition 1- Basic Pay (72100)* Basic Pay multiplier(0)

Condition 2- PF Balance (0)* Withdrawal percentage(0)

Condition 3- Applied Amount(300000)- Total Outstanding Balance(0)

PF Loan Dealing Clerk AJAY SINGH RAWAT(ERFIO) Remarks : Forwarded

Remarks *

5. Check for the details filled, accordingly put remarks and verify or reject the application by clicking on the Verify or Reject button respectively.

Note: PF Loan Verifying Authority may check the pending applications with assigned PF Loan Dealing Clerks , which have missed processing time by clicking on the pending cases in PF Loan Section on LVA's Dashboard.

IR-HRMS

PENDING PF APPLICATIONS:

Application No.	Submitted By	Applied Amount	Withdrawal Type	Withdrawal Reason	Pending With	Submitted On
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Statistics of Users of HRMS application

Your Unit : NORTHERN RAILWAY/ HQ

User Type	No. of Users	Date Last Creation
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Zone : NORTHERN RAILWAY(NR)

User Type	No. of Users	Date Last Creation
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PF LOAN

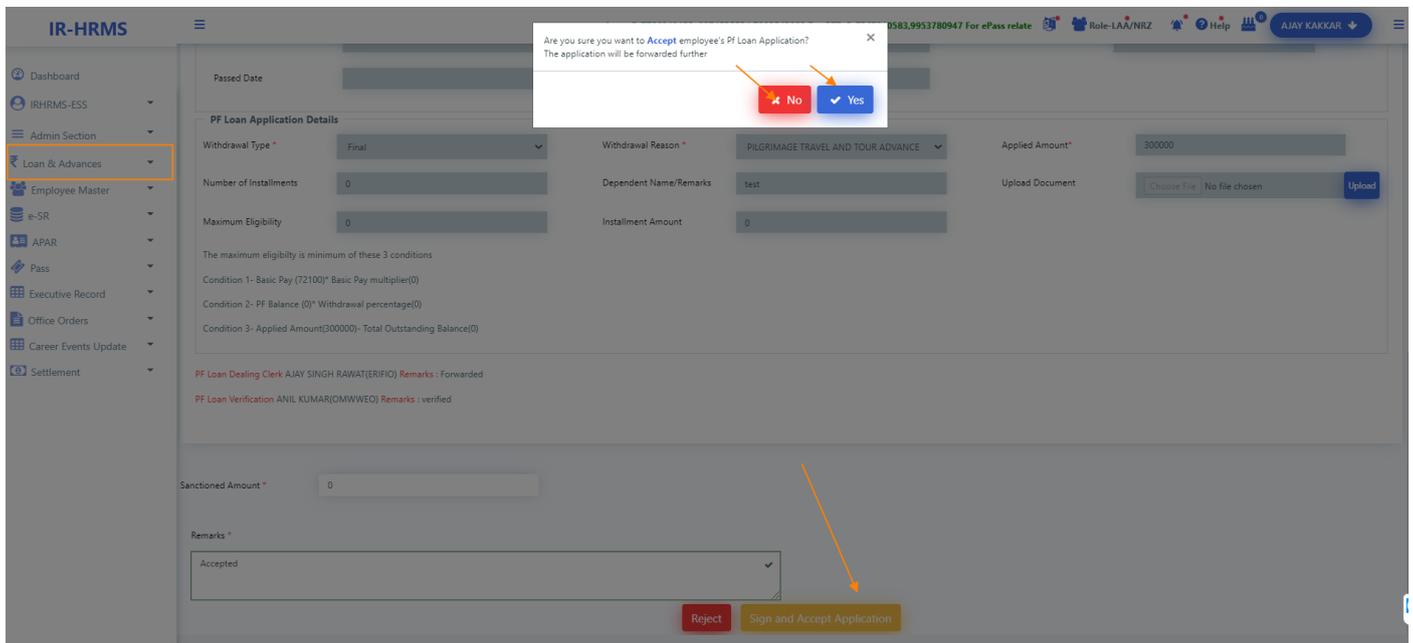
Pending PF Applications

Pending
Cases

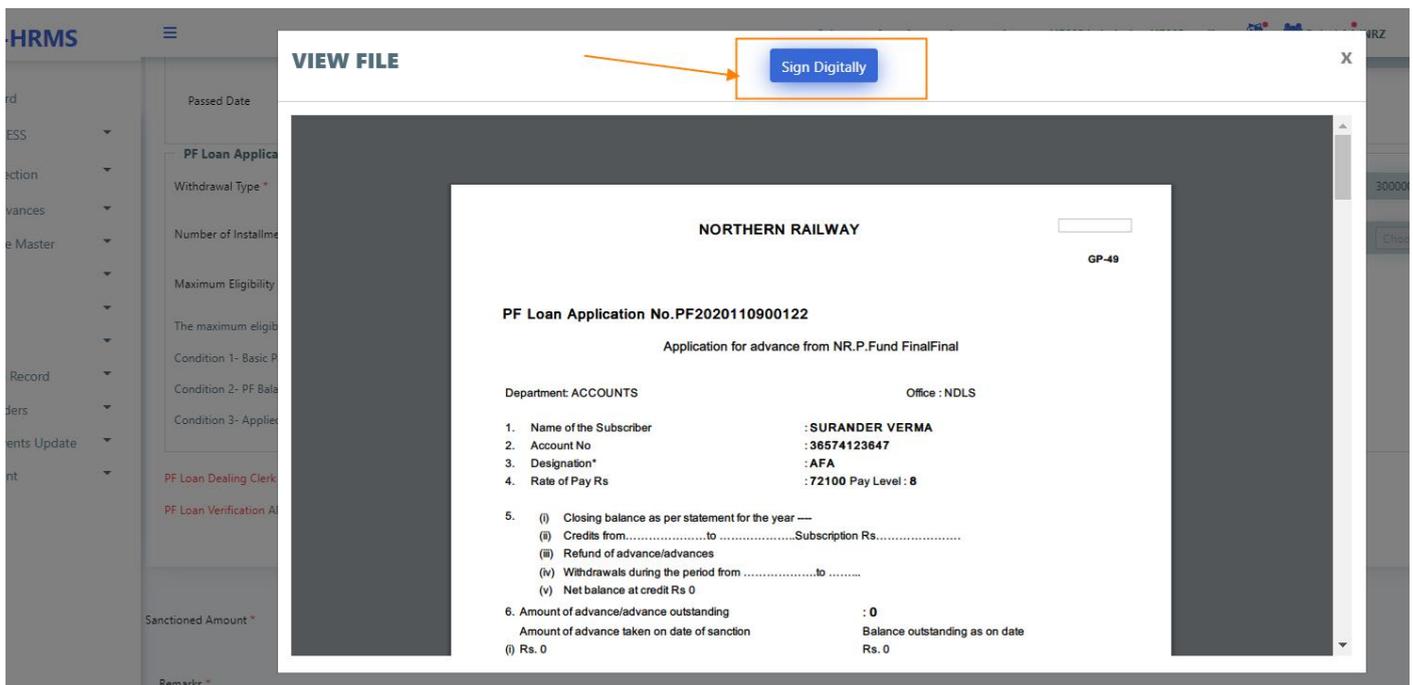
0

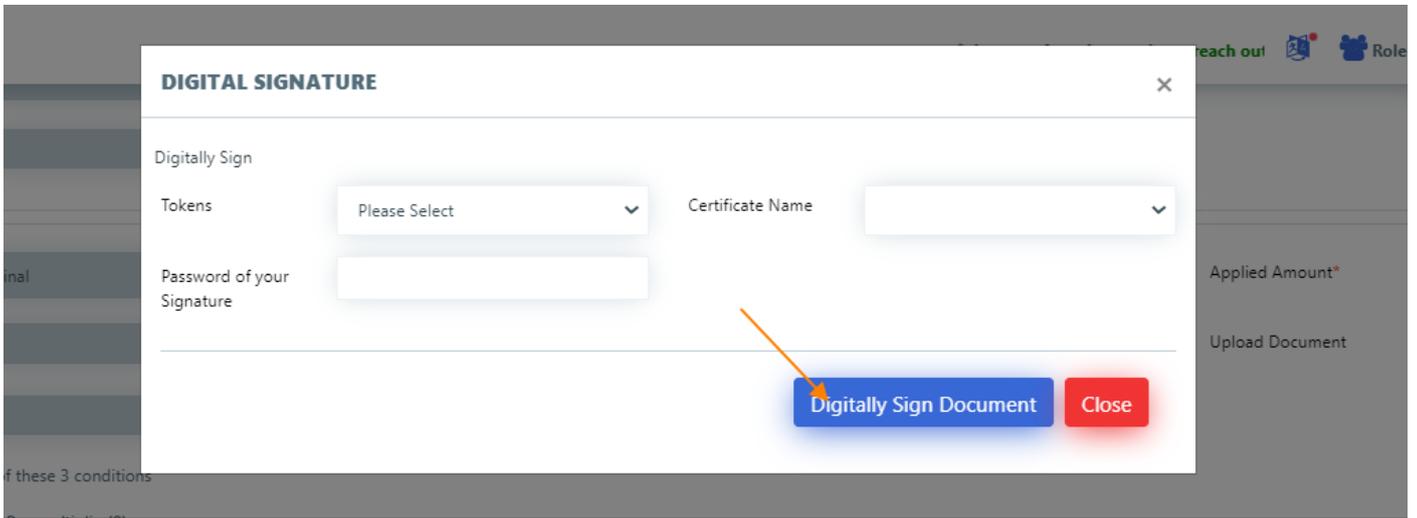
❖ For PF Loan Accepting Authority

1. Login To HRMS application with Loan Accepting Authority's ID.
2. Switch user role to LAA , if having multiple roles.
3. Click on *Loan & Advances > PF Loan Applications*



4. Click on the application number to open the applied application details.
5. Check for the details filled, accordingly put remarks, sanctioned amount and accept or reject the application by clicking on the Sign and Accept Application or Reject button respectively.
6. After successful digital signing by PF loan Accepting authority the application moves to accounts.





Note: PF Loan Accepting Authority may check the pending applications with assigned PF Loan Dealing Verifying authority, which have missed processing time by clicking on the pending cases in PF Loan Section on LAA's Dashboard.

