



दक्षिण रेलवे / SOUTHERN RAILWAY

No.P(R)28/P/Vol.IV

प्रधान कार्यालय / Headquarters Office  
कार्मिक शाखा / Personnel Branch  
चेन्नै / Chennai - 600 003  
दि. / Dated: 15-12-2020

पी बी सी सं / PBC No: 203 / 2020

All PHODs / DRMs / CWMs / CEWE / CAO / CPM / Dy.CPOs / Sr.DPOs /  
DPOs / SPOs / WPOs / APOs of HQ / Divisions / Workshops / other Units  
etc.


(As per mailing list - A)

विषय/Sub : User Manual for PF Loan & Advance Module for HRMS

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A copy of Railway Board letter No. PC-VII/2020/HRMS/16 dated 14-12-2020 alongwith its enclosures on the above subject is enclosed for information, guidance and necessary action.

संलग्न Encl as above

  
(Meena Baskaran)  
Dy. Personnel Officer/R&W  
For Principal Chief Personnel Officer

प्रतिलिपि Copy to : The Genl Secy / SRMU  
The Genl Secy / AISCSTREA  
The Genl Secy / AIOBCREA  
The Genl Secy / NFIR  
Ch.S&WI / System to upload in the website

**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  
Copy forwarded to :-

New Delhi, dated: 14.12.2020

1. PEAs All Indian Railways, PUs, NFR(Const)

2. The Principal, National Academy of Indian Railways, Vadodara.
3. The General Manager, CORE/Allahabad
4. The Director General, RDSO, Lucknow,
5. The General Manager and FA&CAO, Metro Railway
6. The CAO and PFA, COFMOW/New Delhi
7. The CAO(Const), MTP(R)/Mumbai.
8. The CAO(MTP(R) Chennai
9. The Director, CAMTECH/Gwalior
10. The Director (a) IRIEEN, Nasik, (b) IRICEN, Pune (c) IRIMEE, Jamalpur (d) IRISSET, Secunderabad
11. The Managing Directors RITES, IRCON, CRIS, IRFC, CONCOR, RVNL, DFCCIL, KRCL.
12. The Chairman-cum-Managing Director, Konkan Railway Corporation, New Delhi.
13. The Pay & Accounts Officer, Railway Board, Rail Bhawan, New Delhi.
14. The General Secretary, IRCA/New Delhi.
15. The Commissioner, Railway Safety, Lucknow.
16. Executive Director (Finance), RDSO, Lucknow.
17. The Chairman, RCC Lok Sabha Secretariat, New Delhi.
18. The Chairman, RRT, Chennai.
19. The Chairman, RCT.
20. The Chairman RRB/Ajmer, Ahmedabad, Allahabad, Bangalore, Bhopal, Bhubaneswar, Chandigarh, Chennai, Calcutta, Jammu, Gorakhpur, Guwahati, Malda, Mumbai, Muzaffarpur, Patna, Ranchi, Secunderabad and Trivandrum.
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.
29. The Liaison Officer, VII CPC, All Indian Railways and PUs/RDSO/Trg. Institutes Metro Railway/COFMOW/CORE/RSC etc.
30. The Director (Movement) Railways/Calcutta.
31. General Manager/HRMS/CRIS



(Jaya Kumar G)  
Deputy Director, Pay Commission-VII  
Railway Board

**Copy forwarded to:-**

1. The General Secretary, AIRF, Room No. 253, Rail Bhawan
2. The General Secretary, NFIR, Room No. 256 E, Rail Bhawan
3. Copy to all members of the National Council, Departmental Council and Secretary Staff Side, National Council, 13-C, Ferozshah Road, New Delhi
4. The Secretary General, Federation of Railway Officers' Association.
5. All India SC/ST Railway Employee's Association, Room No. 7, Rail Bhawan.
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**

**Copy to:-**

PSOs/Sr.PPSs/PPSs/PSs/PAs to:-

MR, MSR(S), MSR(G), CRB & CEO, Member (Finance), Member (Infrastructure), Member (Traction & Rolling Stock), Member (Operations & Business Development), Secretary/RB, DG/HR, DG/RHS, DG/RPF, All Additional Members/ Advisors/ Executive Directors/Joint Secretaries.

Cash - I, II, & III, Budget, E(P&A) I & II, E(G), E(NG) I & II, PC - III, PC-IV, PC-V, PC-VI, E(LR) I & II, F(E) - I, II & III, F(E) Special, Security (E), Accounts III, ERB - I, II, III, IV, V & VI, G(Pass), G(Acc), RB(Welfare), E(SCT) I & II, E(O) I, II III & III(CC), E(GR) I & II, E(GP), E(GC), PR, branches of Railway Board.

## **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' form in the HRMS application. The form has the following fields and buttons:

- IPAS/HRMS ID \***: Text input field with a 'Go' button to its right.
- User ID \***: Text input field.
- Employee Name \***: Text input field.
- Mobile number \***: Text input field.
- HRMS ID \***: Text input field.
- Nickname \***: Text input field.
- User Type \***: Dropdown menu with the option '--Please Select--'.

Below the form, there are four buttons: 'Create User', 'Reset Password', 'Update Mobile', and 'Reset'. At the bottom right, there is a 'Load User List' button. The page header shows 'IR-HRMS' and the breadcrumb 'Home / Admin Section / Create Users'.

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.

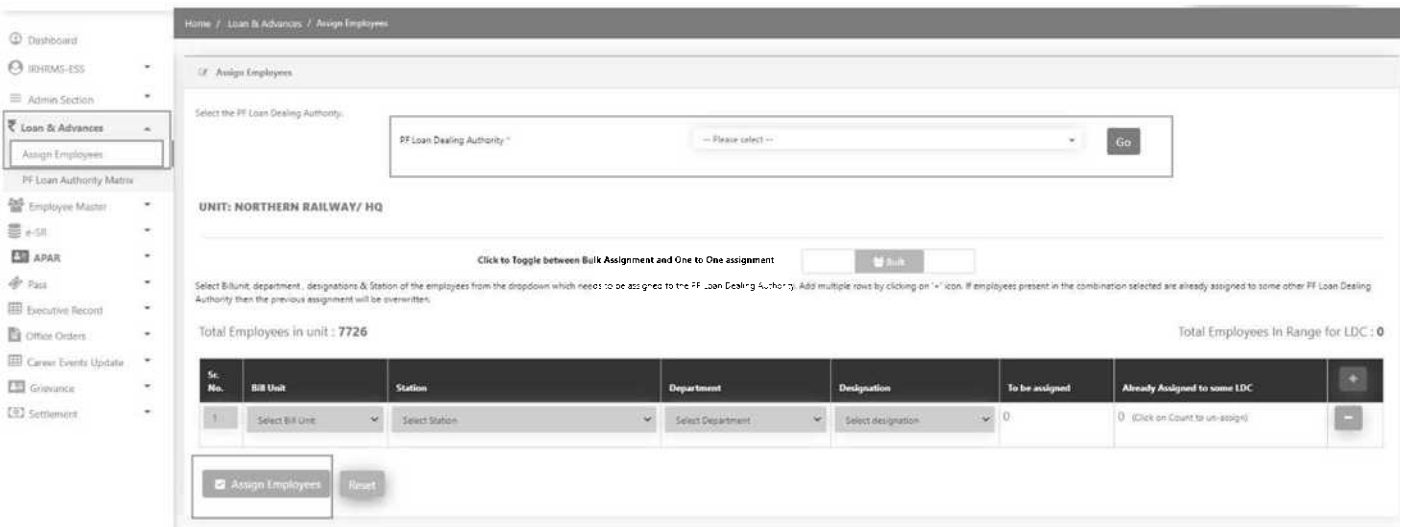
### B. LDC, LVA, LAA mapping

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.

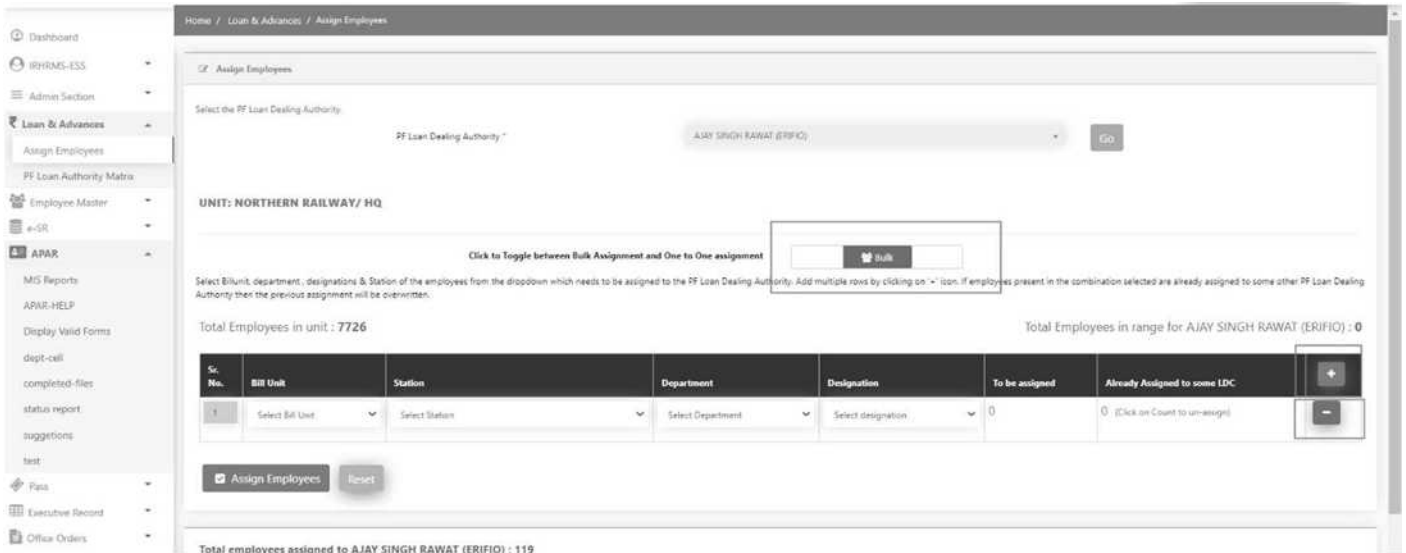


## C. Employee assignment to LDC

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.

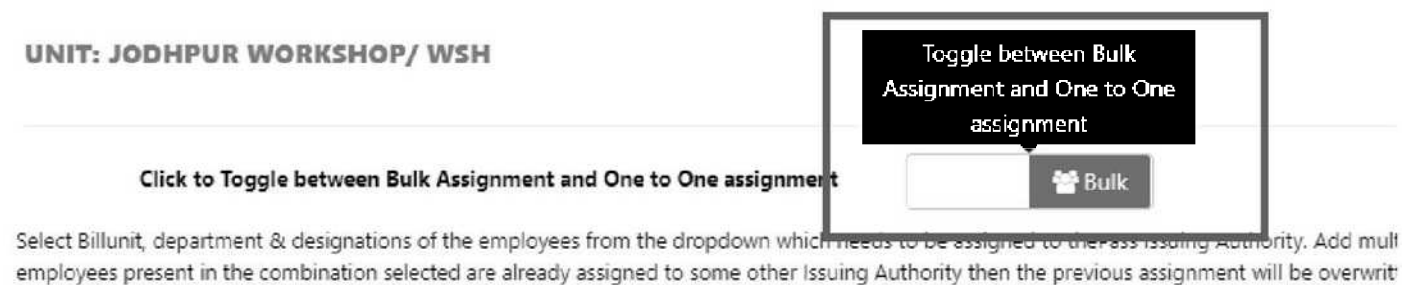


4. **For bulk assignment**, select the bill unit, station, department & designation combination. The count of to be assigned employees and those employees which are already assigned to some LDC will be shown. Add more rows by clicking on '+' and remove rows by clicking on '-' icon

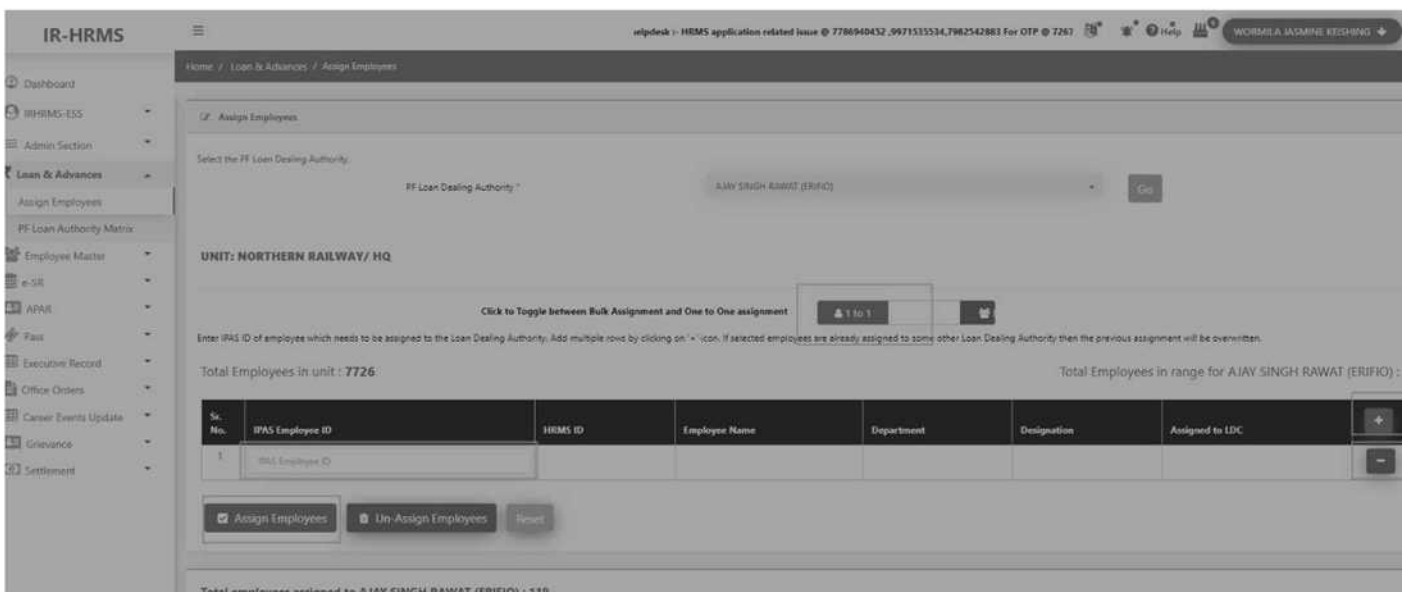


5. Click on 'Assign Employees' button to assign selected employees to the LDC.

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



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 |
|----------|---------|---------|---------------|------------|-------------|--------------|
|----------|---------|---------|---------------|------------|-------------|--------------|

11. To unassign all employees from LDC, click on 'Unassign All'. All the employees will be removed from selected LDC.

Admin Section  
 Loan & Advances  
 Assign Employees

Assign Employees
  Un-Assign Employees

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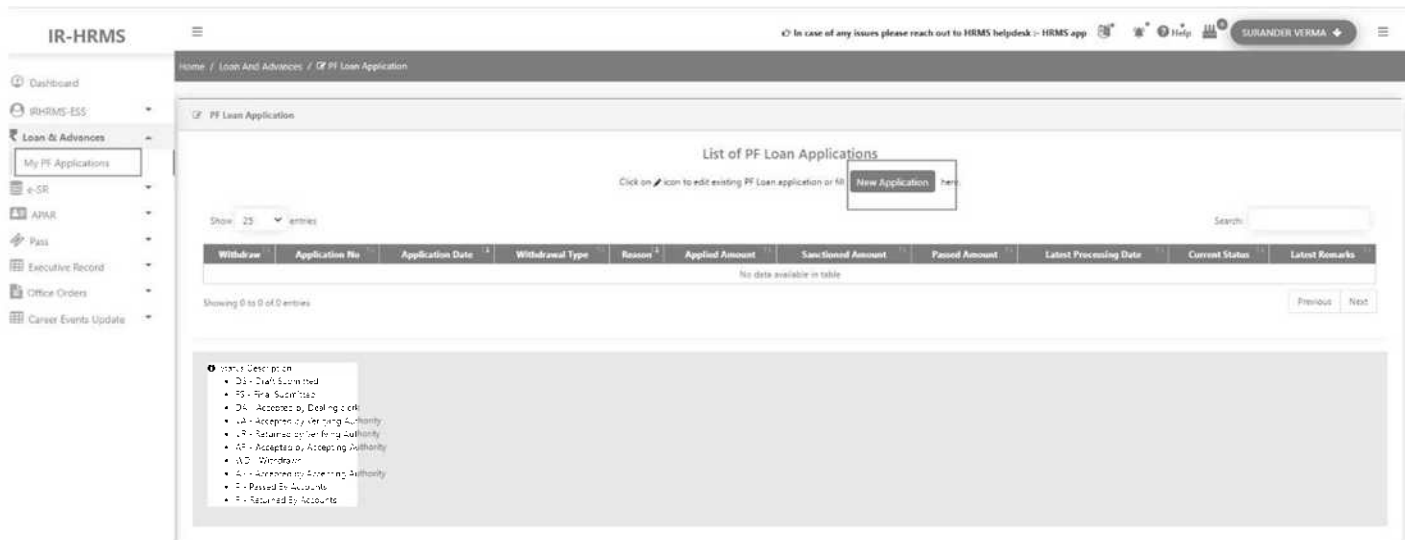
PF Loan Authority Matrix  
 Employee Master  
 e-SR  
 APAR  
 Pass  
 Executive Record  
 Office Orders

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

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

## ❖ 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.

| Application Number | Employee Name  | Employee Designation | Withdrawal Type | Reason                            | Applied Amount | Application Date | Application Status |
|--------------------|----------------|----------------------|-----------------|-----------------------------------|----------------|------------------|--------------------|
| PF2020110600132    | SURINDER VERMA | ATA                  | F               | PEGRIMAGE TRAVEL AND TOUR ADVANCE | 30000          | 2020-11-09       | PS                 |

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

PF Loan Application Details

Withdrawal Type: F Reason: PEGRIMAGE TRAVEL AND TOUR ADVANCE Applied Amount: 30000

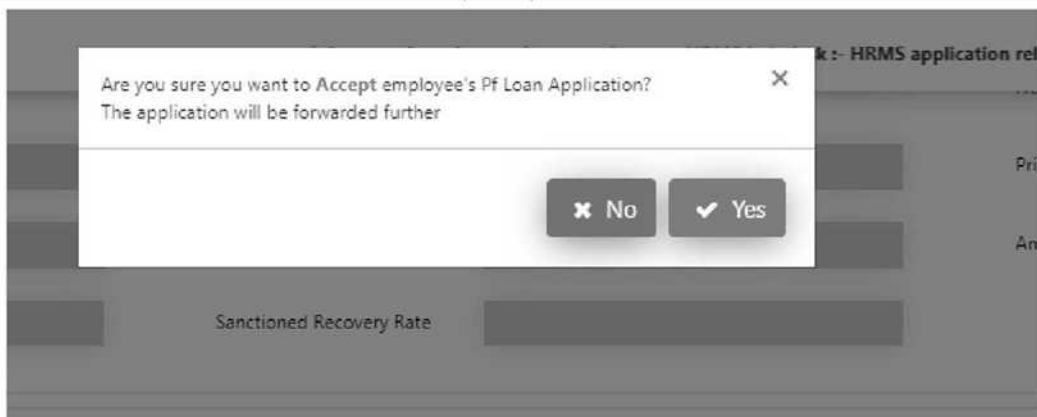
Number of Installments: 3 Dependent Name/Remarks: test Upload Document: [Choose File] [No file chosen] [Upload]

Maximum Eligibility: 3 Installment Amount: 3

The maximum eligibility is minimum of these 3 conditions:  
 Condition 1- Basic Pay (21300\* Basic Pay multiplier)  
 Condition 2- PF Balance (0\* Withdrawal percentage)  
 Condition 3- Applied Amount(30000- Total Outstanding Balance)

Remarks: Forwarded

[Forward] [Reject]



## ❖ 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: Final | Withdrawal Reason: PILGRIMAGE TRAVEL AND TOUR ADVANCE | Applied Amount: 20000

Number of Installments: 0 | Dependent Name/Remarks: text | Upload Document: Choose file | No file chosen | Upload

Maximum Eligibility: 0 | Installment Amount: 0

The maximum eligibility is minimum of these 3 conditions:  
 Condition 1: Basic Pay (72100)\* Basic Pay multiple(0)  
 Condition 2: PF Balance (0)\* Withdrawal percentage(0)  
 Condition 3: Applied Amount(20000)- Total Outstanding Balance(0)

PF Loan Dealing Clerk: AMY SINGH RAMATEERFIQ | Remarks: Forwarded

Remarks: verified

Buttons: Verify, Reject

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 |
|-----------------|--------------|----------------|-----------------|-------------------|--------------|--------------|
| [Empty rows]    |              |                |                 |                   |              |              |

**Statistics of Users of HRMS application**

Your Unit: NORTHERN RAILWAY HQ | Zone: NORTHERN RAILWAYHQ

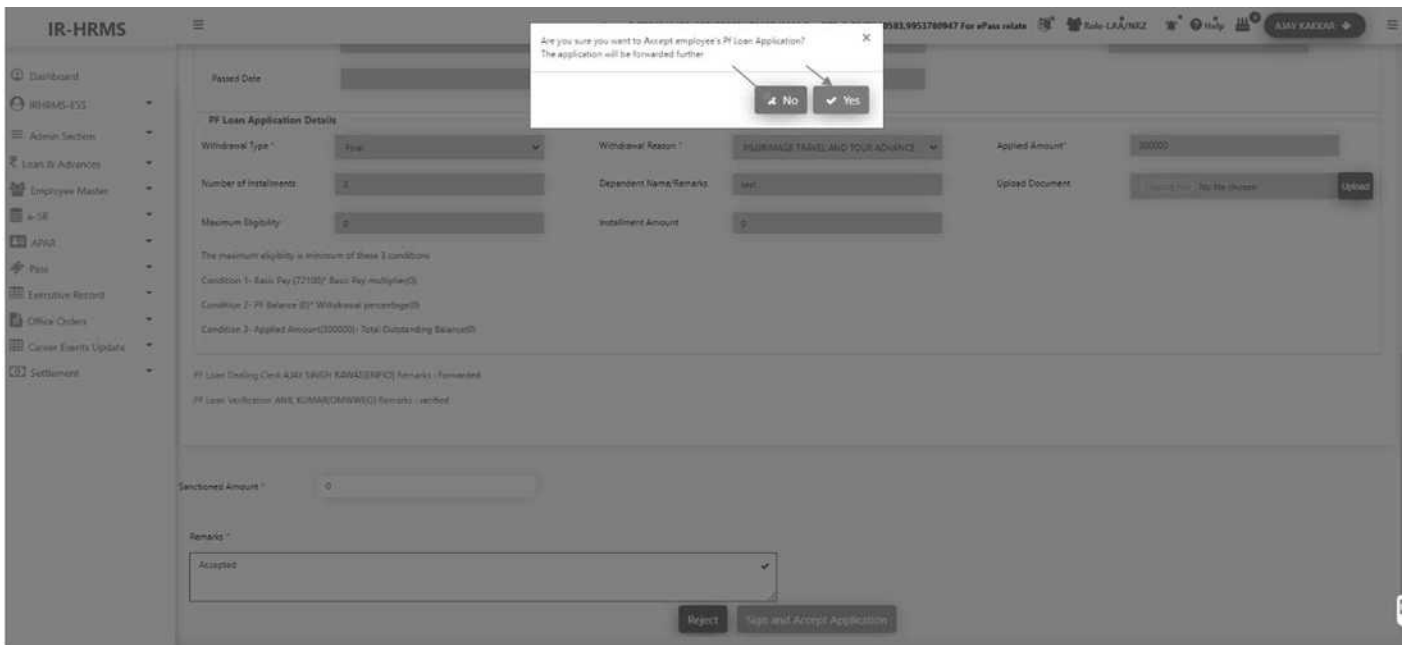
| User Type | No. of Users | Date Last Creation |
|-----------|--------------|--------------------|
|           |              |                    |

**PF LOAN**  
Pending PF Applications: 0

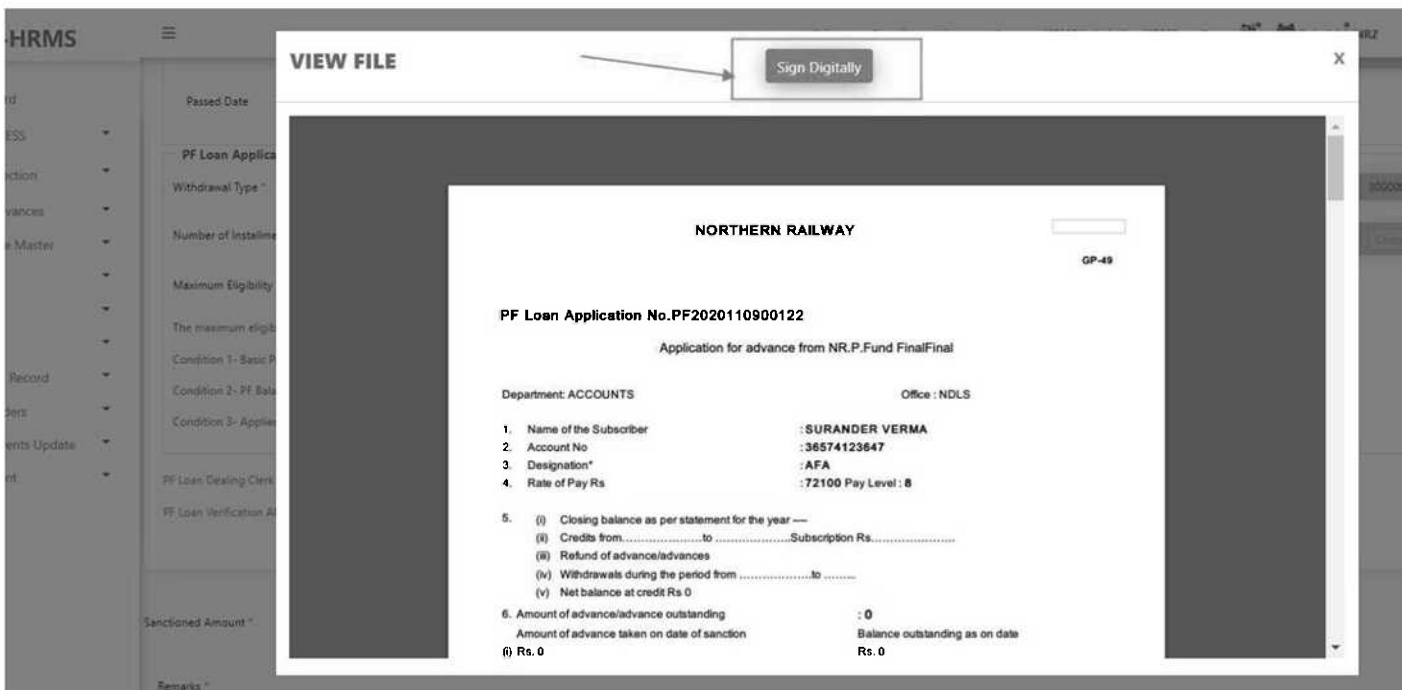
**Pending Cases**

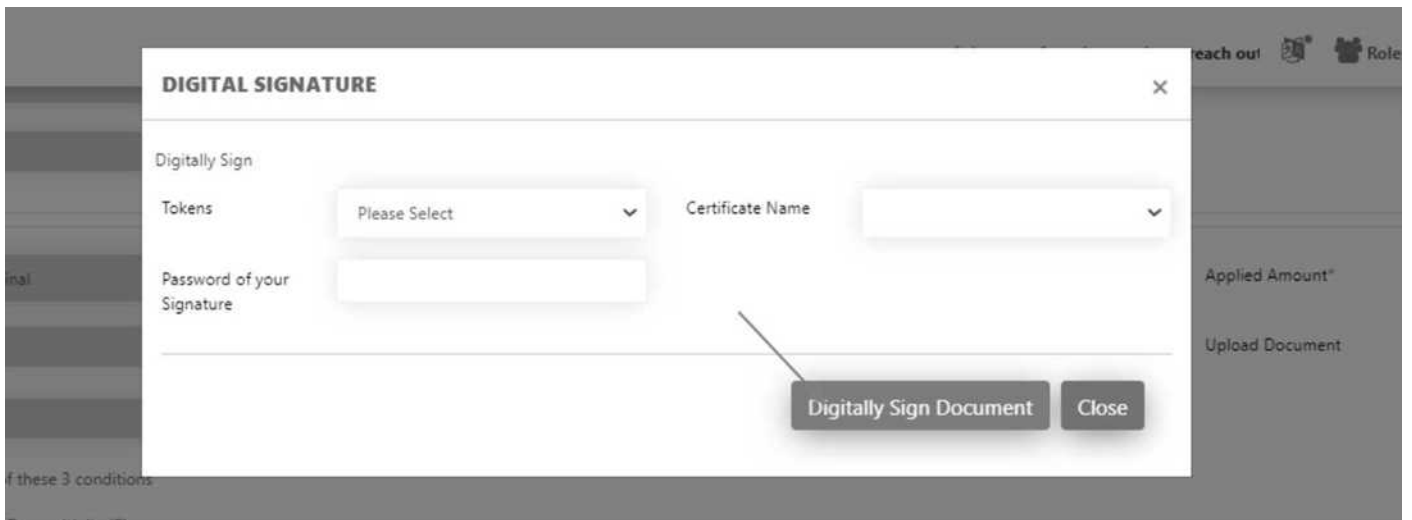
## ❖ For PF Loan Accepting Authority

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.

