

## **A Brief on CSI HRMS Correction Procedure**

### **DEPARTMENT OF POSTS**

Ministry of Communications & IT, Government of India

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Version 1.0

**Summary:** The document will cover the process and steps for different HR processes and also align the user with the system requirement as part of data maintenance/correction. By referring this document, user will be able to maintain the data in the CSI System and also will be able to ensure smooth functioning of HR applications and processes. User will be able to extend support to all the employees within the division whenever asked for. Below is the list of processes

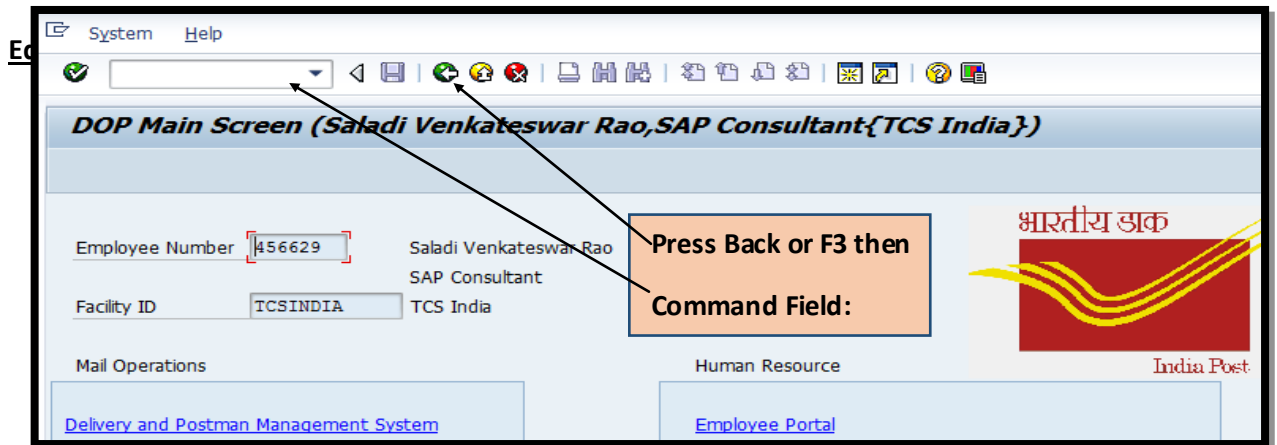
1. **Personal Data; Employee Name, DOB, Marital Status, Gender**
2. **Family Details**
3. **Personal IDs; DDO code/Aadhar number/PAN card**
4. **Leave quota**
5. **Leave Absence**
6. **Employee Cost Centres and Head of Account.**
7. **Post to Post Mapping for Departmental and GDS Employees.**

**Brief :** The entire life cycle of an employee will be updated in the system as part CSI Migration. Initially, the 'Joining and latest' event type is only captured in the system. This will ensure that every employee is occupying a designated post and they have been provided with required roles which will enable them to do their work in the CSI system. Please understand that the correctness of the HRMS data has to be ensured so that flow of work could be assured. Majorly, in the HRMS system there are five actions i.e. Create, Copy, Change, Delete and overview. Please also understand that the data is maintained on the basis of dates and these dates play a vital role in the CSI system. Please take caution while maintaining each data....here is the meaning of caution.

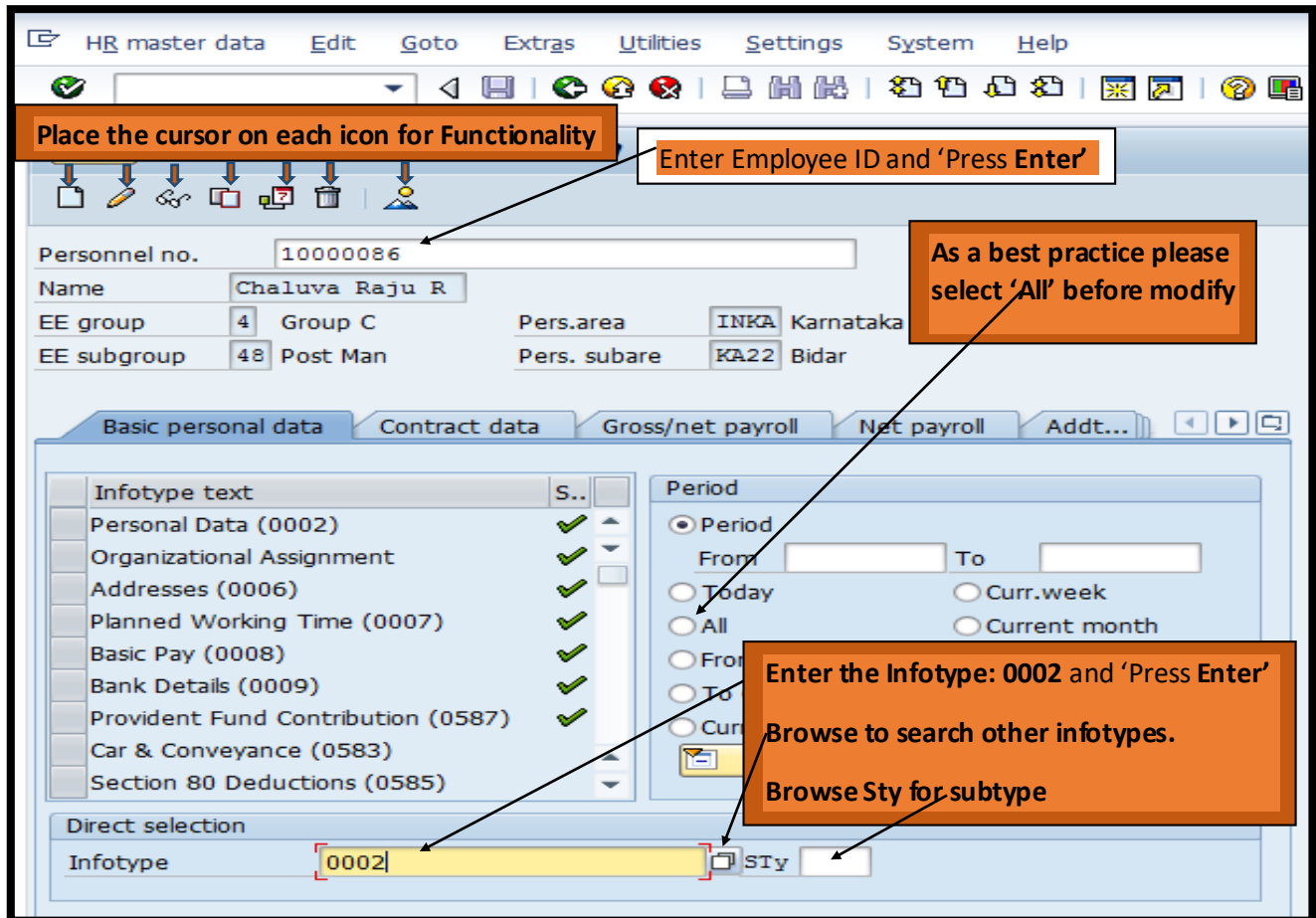
**When data is updated with certain date, against that some action might have taken into place or calculation is happening. Now changing the dates will influence those actions so we have to understand the nature and take decision for whether to Create, Copy, Change, Delete the entry.** The transaction code for HR data is 'PA30'. You would be using this transaction for majority of the changes or verifying the correctness of the data. Once you access PA30, please furnish Employee ID and press enter and manage the data.

## How to access PA30

Please log in to CSI SAP System. You will be routed to DoP Main Screen. Press F3 or back, you will see a screen as 'SAP Easy Access'. Enter **PA30** in the **command field**, which is available on the top left screen.



## PA30 Screen: Maintain HR Master Data



**Personal Data (Infotype 0002)** : The start date of the record is normally the **Date of Birth**. User can modify the below changes and then save it.

Start	01.06.1959	to	31.12.9999	Chng	12.12.2017	TCS456629
<b>Name</b>						
Form Addr.	Mr.	Name Format		<input type="checkbox"/>		
Last name	R		Birth name	<input type="text"/>		
First name	Chaluva Raju					
<b>Additional Data</b>						
Gender	Male	M Tongue	English			
Birth date	01.06.1959	Mar.Status	Marr.			
Birthplace	Hyderabad		Since	01.01.2010		
Ctry o.birth	India	No. child.	2			
State	01	Andhra Pradesh	Religion	Orthodox		
Nationality	Indian					

**Edit Family Details (Infotype 0021):** User can modify the details of Family Members. Browse **Sty (subtype)** and select **Spouse, child, Father, Mother, Daughter In-Law, Mother in-Law, Father in-Law** etc.

Start	01.01.2010	to	31.12.9999
<b>Family Member/Dependents (0021)</b>			
Family Member	Spouse		
Last name	Kaushal		
First name	Srividya		
Gender	<input checked="" type="radio"/> Female <input type="radio"/> Male		
Date of birth	01.01.1990		
Nationality	Indian		

Note: To view entire Family Details, Select All and click Overview icon.

**Edit Personal IDs:** User can Create, Change, Delete the Aadhaar ID, PAN No. DDO ID etc.

From	01.01.2017	to	31.12.9999
<b>Personal IDs</b>			
ID type	PAN Number		
ID number	ADABC1327Q		

**Edit Leave Quota (Infotype 2006):** Every employee will have leave quota i.e EL, HPL, CL and RH. In the system, there are two date that we use and it is important to understand it.

First is 'From' and 'To' Date (This is used for the quota period i.e. for EL and HPL it should be Half Yearly and for CL and RH it should be yearly).

Second is **Deduction From** and **Deduction To** (This is used for the validity period i.e. for EL and HPL the dates should be 'Start Date of Generation (this may be the migration date)' to '31.12.9999'. This means the leaves are valid till 31.12.9999. and all other leaves would be on yearly basis.

For employees whose balance will touch 300 days, system will generate 15 days quota every six months with the validity period of six months. Always remember to select **All** before clicking overview so that all the records get displayed.

Every year the quota will get generated automatically for all the employees centrally. The available quota would be displayed in the ESS screen for all the employees.

### Overview of Infotype 2006

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
01.07.2017	31.12.2017	55	Earned Leave-EL(300+15)	01.07.2017	31.12.2017	15.00000	0.00000
01.01.2017	31.12.2017	51	Earned Leave-EL	01.01.2017	31.12.9999	300.00000	0.00000
01.01.2017	31.12.2017	52	Restricted Holid-RH	01.01.2017	31.12.2017	2.00000	0.00000
01.01.2017	31.12.2017	53	Casual Leave-CL	01.01.2017	31.12.2017	8.00000	0.00000
01.01.2017	31.12.9999	54	Half-Pay leave (HPL)	01.01.2017	31.12.9999	194.00000	0.00000

### Maintenance of Infotype 2006

From	01.01.2017	To	31.12.2017	Chg.	12.12.2017	TCS456629
<b>Absence quota</b>						
Category	53	Casual Leave-CL				
Time		-				
Quota number	8.00000	Days				
Deduction	0.00000	➔ Neg. deduction to 0.00000				
Deduction from	01.01.2017					
Deduction to	31.12.2017					

## Maintenance of Infotype 2001

For updating any leave, please use Infotype 2001 and create the Infotype. System will propose to select **Type of Leave**, select Start Date and End Date and save. Automatically, the leave will get deducted from the quota.

Start	01.01.2018	To	15.01.2018
<b>Absence</b>			
Absence type	1001	Earned Leave (EL)	
Time		-	<input type="checkbox"/> Prev.day
Absence hours	85.00		<input checked="" type="checkbox"/> Full-day
Calendar days	15.00		
Quota used	15.00	Days	

## Employee Cost Centre and Head of Account:

Employee cost Centre and Head of Account are tagged to the post the employee which is available in the Infotype 0001. In case the Head of Account is incorrect then select the post of the employee from the Infotype 0001 and goto PO13. Enter the post ID and select the row **Emp Group/Subgroup (1013)**. Select the Head of Account under the field **Org Key** and save. Please note that there is no need to change the start date.

Org.key	
---------	--

## Cost Centre Change :

Go-to to PO13, enter the post ID, select the **Infotype relationships (1001)**,

Relationships (1001)	01 S 30009250 1
Relationship type/relationship	A 011 Cost center assignment
<b>Related Object</b>	
Type of related object	Cost center
ID of related object	2101000000DOPI
Abbreviation	Mysore MMS
Name	Mysore MMS

## Frequent Issues and their resolution:

- a) Correction in the employee personal data such as Name Spelling, Gender, Marital Status etc.

Solution: Kindly go with the Process for correction of the **Personal Details**.

- b) Correction/Creation of the family details such as spouse name, gender, fathers name etc.

Solution: Kindly refer the process of Family detail change.

c) In sufficient Leave Quota, Excess Leave Quota or any Leave Quota Correction.

Solution: Kindly refer the process of leave quota correction

d) While applying leave error such as

- i) BADI Method Error
- ii) Parameter Missing

Solution: Kindly maintain the Post-to-Post mapping for the employee.

e) Not Able to apply Child Care Leave

Solution: The child details should be maintained in the family details i.e. Infotype 0021.

f) Assign / Change Shift (work schedule) to employee.

Solution: The standard mapping is GEN1 for Administrative Offices and GEN2 for others e.g. HO, SO. Assign this to Infotype 0007. There is a field Work Schedule Rule where **WSRUGEN1** OR **WSRUGEN2** has to be maintained.

In relation to this, we have to maintain set mapping to Office or Facility. Select the office ID (Organisation Unit) from Infotype 0001, Go to PO10 and enter Office ID. Select the Infotype 1011. Select Change and check the set timings. If you need a different timing then maintain and save.

g) Challenge Details

Solution : If employee is challenged/disabled and the same data has to be updated in the system then goto Infotype 0004 and maintain. However one should update only previous data if any. Please ask every employee to raise such events from ESS only.

h) Employee Payroll to be stopped

Solution : Goto Pa30 and enter Infotype 0003 and check the Pers.No.Locked.

Employee ID is locked:

## Workflow movement

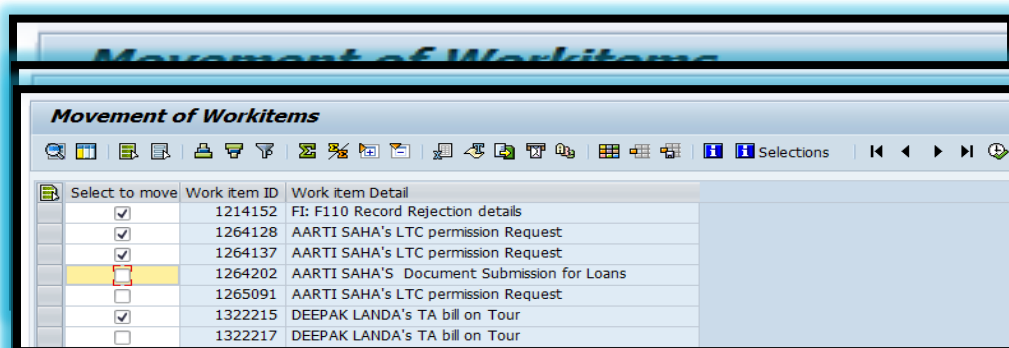
There are instances when Authorities (Approvers) goes on emergency leave without actually applying the leave in the system e.g. Oral confirmation/intimation, or instances where employee is under punishment and not allowed to access system. The inbox work item is to be moved to some authority for necessary action (Forward/Approval).

Process:

Enter the Transaction Code : **ZHR\_MOVEINBOX**

Provide the Employee ID of the person gone on Leave without intimation in the From field.

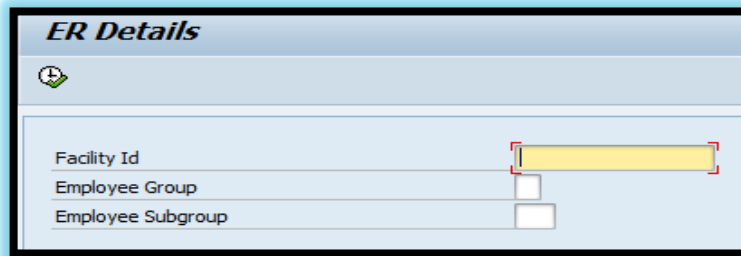
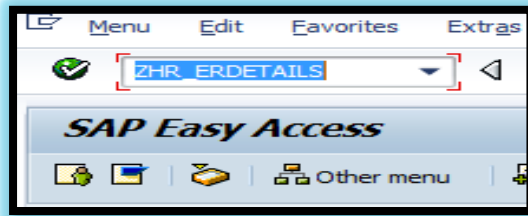
Provide the Employee ID of the person to whom these work items to be forwarded.



# Recruitment of New Joinees

## Establishment Register Verification

Tcode : ZHR\_ERDETAILS



Please provide the facility id of your office and you can also filter by providing Employee Group and Employee Subgroup. Now hit execute button(Clock icon on the top).



We get the output list as shown below with Facility ID, Office ID, Facility Description, Post , Post Text, Post Status , Employee Number , Employee Name , Class and Cadre.



**ER Details**

No of Posts: 131  
Filled: 34  
Vacant: 97

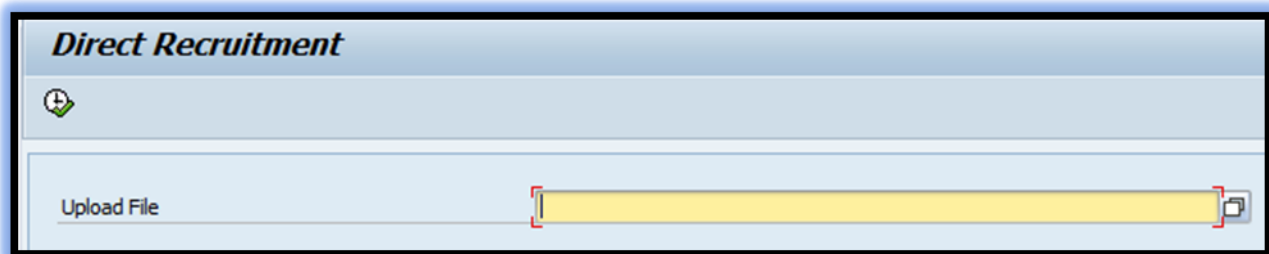
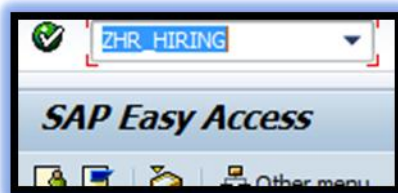
Facility Id	Office ID	Facility Description	Post	Post Text	Post Status	Employee No.	Employee Name	Class	Cadre
DV11060000300	10386063	Maharashtra Circle Office	30021314	Senior Superintendent of Posts	FILLED	30000028	Raju K	GROUP B GAZETTED	POSTAL SERVICE GR
DV11060000300	10386063	Maharashtra Circle Office	30021315	Asst Superintendent of Posts	FILLED	30000031	Prasad A	GROUP B GAZETTED	ASST SUPDT POS
DV11060000300	10386063	Maharashtra Circle Office	30021316	Postal Assitant	FILLED	30000036	Deepak G	GROUP C	POSTAL ASSISTANT(
DV11060000300	10386063	Maharashtra Circle Office	30022474	Postal Assitant	FILLED	30000037	Landa GH	GROUP C	POSTAL ASSISTANT(
DV11060000300	10386063	Maharashtra Circle Office	30023347	Multi Tasking Staff	FILLED	30000072	GH Landa	GROUP C	MULTI TASKING STAI
DV11060000300	10386063	Maharashtra Circle Office	30023348	Multi Tasking Staff	FILLED	30000073	E Mohammad	GROUP C	MULTI TASKING STAI
DV11060000300	10386063	Maharashtra Circle Office	30023349	Multi Tasking Staff	FILLED	11002184	Manik Chand	GROUP C	MULTI TASKING STAI
DV11060000300	10386063	Maharashtra Circle Office	30025300	Post Master	FILLED	11002390	Karan Karanjear	GROUP C	NURSE
DV11060000300	10386063	Maharashtra Circle Office	30026951	Postal Assistant	FILLED	19000000	Bhupendra PRASHANT	GROUP C	POSTAL ASSISTANT(
DV11060000300	10386063	Maharashtra Circle Office	30026952	Postal Assistant	FILLED	19000027	Gauri Shanakar	GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026953	Postal Assistant	FILLED	40000012	RYAN D'SOUZA	GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026955	Postal Assistant	FILLED	40000014	MOHAN PRAKASH	GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026958	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026959	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026961	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026962	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026963	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026964	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026965	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026966	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026967	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(
PO24403142000	10386438	Yavatmal Division	30026968	Postal Assistant	VACANT			GROUP C	POSTAL ASSISTANT(

The details for the provided office and the below offices are extracted from the system. The vacant postid from the above is used for the hiring new joinees to the office. The template and the process for the same is shared below.

## Recruitment for New Joinees

Tcode : ZHR\_HIRING

Provide the above Tcode on the SAP Easy access menu screen and hit enter.



Please upload the excel with the below format.

FacilityID	PostID	FirstName	LastName	DOJ	DOB	GENDER	MARITAL_STAT	PAN	AADHAR	DDO	COSTCENTER	HOA
Only ID no Text	8 digit postid			dd.mm.yyyy	dd.mm.yyyy							

Marital Status		Gender	
0	Single	1	Male
1	Married	2	Female
2	Widow		
3	Divorcee		

The Postid can be provided using the tcode ZHR\_ERDETAILS to get the vacant post .

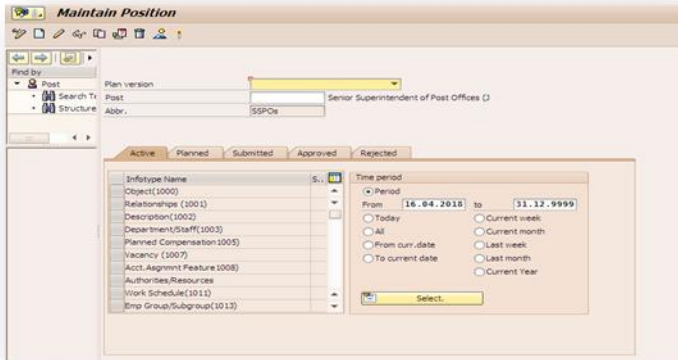
**NOTE: Please use the provided codes for Gender and Marital Status as given in the excel.**

**Please Note:**

1. After creation of employees the tagging of employee and post can be seen by next day in ZHR\_ERDETAILS.
2. Always check the postid in po13 whether the employee group(1013) and account assignment feature(1008) is created or not. Postids without employee group(1013) and account assignment feature(1008) cannot be used for hiring.

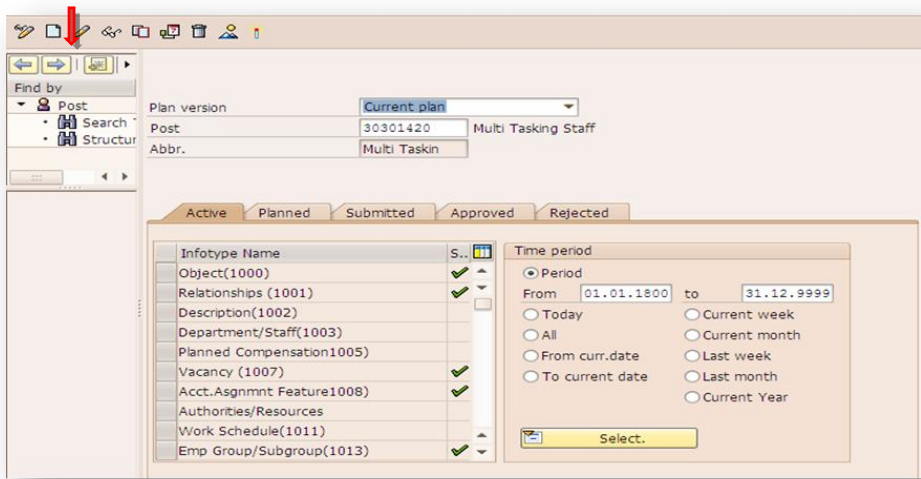
## Create Account Assignment Feature

Use P013 T-Code to Maintain Position



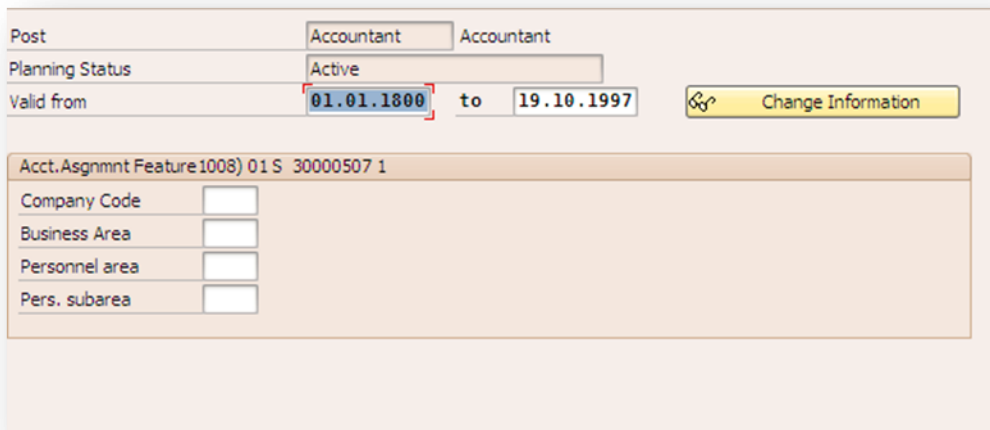
Give the post ID For which you want to create Account Assignment and hit enter button from keyboard .

Now Select Infotype Account Assignment Feature(1008).



Select Radio button All in Time Period

Click on Create or use F5 button.



Now Give Company Code as DOPI ,respective Business Area and personal area.

While Selecting Personal Subarea ,Click F4

Personnel area INMP			
Personnel Area Text Madhya Pradesh			
PSubarea	P.subarea text	Start Date	End Date
0001	Madya Pradesh P	01.01.1800	31.12.9999
0002	Roshna B.O	01.01.1800	31.12.9999
0003	Samapur B.O	01.01.1800	31.12.9999
0004	Kanki B.O	01.01.1800	31.12.9999
0005	Gongalai B.O	01.01.1800	31.12.9999
0006	Linga B.O	01.01.1800	31.12.9999
0007	Garra B.O	01.01.1800	31.12.9999
0008	Kunhari B.O	01.01.1800	31.12.9999
0009	Magardarra B.O	01.01.1800	31.12.9999
0010	Mohgaon Dhapera	01.01.1800	31.12.9999
0011	Linga B.O	01.01.1900	30.11.2017
0012	Angaon B.O	01.01.1800	31.12.9999
0013	Birwa B.O	01.01.1800	31.12.9999
0014	Boda B.O	01.01.1800	31.12.9999
0015	Kalegaon B.O	01.01.1800	31.12.9999
0016	Kareli B.O	01.01.1800	31.12.9999
0017	Khurmundi B.O	01.01.1800	31.12.9999
0018	Majhgaon B.O	01.01.1800	31.12.9999
0019	Mukki B.O	01.01.1800	31.12.9999
0020	Piparia B.O	01.01.1800	31.12.9999
0021	Sarekha B.O	01.01.1800	31.12.9999
0022	Majhgaon B.O	01.01.1900	30.11.2017
0023	Piparia B.O	01.01.1900	30.11.2017
0024	Ameda B.O	01.01.1800	31.12.9999
0025	Boda B.O	01.01.1900	30.11.2017
0026	Chalisbodi B.O	01.01.1800	31.12.9999
0027	Dhansua B.O	01.01.1800	31.12.9999
0028	Bakal B.O	01.01.1800	31.12.9999
0029	Bijatola B.O	01.01.1800	31.12.9999
0030	Damoh B.O	01.01.1800	31.12.9999
0031	Garra Tola B.O	01.01.1800	31.12.9999
0032	Kachnari B.O	01.01.1800	31.12.9999

Select Restricted Value (the button beside the green tick button in the above snapshot).

Post: Accountant Accountant  
 Planning Status: Active  
 Valid from: 19.10.1997 to 19.10.1997 Change Information

Acct. Asgmt Feature 1008) 01 S 30000507 1

Company Code: DOPI Department of Post India  
 Business Area: 1015  
 Personnel area: INMP

Restrictions

Personnel area:  ➔

Personnel Area Text:

Personnel subarea:

Pers. subarea text:

Restrict number to:  No restriction

Click on No restriction.

Then select personal Subarea from the List

After Giving All information Select Save Button or use (Ctrl+S) to save the Information.

## Create Employee Group/SubGroup

**Maintain Position**

Plan version: [dropdown]  
Post: Senior Superintendent of Post Offices (J)  
Abbr.: SSPOs

Active | Planned | Submitted | Approved | Rejected

Infotype Name | S... | Time period

Object(1000)  
Relationships (1001)  
Description(1002)  
Department/Staff(1003)  
Planned Compensation(1005)  
Vacancy (1007)  
Acct. Asgnmnt Feature(1008)  
Authorities/Resources  
Work Schedule(1011)  
Emp Group/Subgroup(1013)

Time period  
From 16.04.2018 to 31.12.9999  
 Today  
 All  
 From curr.date  
 To current date  
 Current week  
 Current month  
 Last week  
 Last month  
 Current Year

Select.

Give the post ID For which you want to create Employee Group or Subgroup .

Now Select Infotype Emp Group/Subgroup (1013).

Plan version: 01 Current plan  
Post: 30000507 Accountant  
Abbr.: Accountant

Active | Planned | Submitted | Approved | Rejected

Infotype Name | S... | Time period

Object(1000)  
Relationships (1001)  
Description(1002)  
Department/Staff(1003)  
Planned Compensation(1005)  
Vacancy (1007)  
Acct. Asgnmnt Feature(1008)  
Authorities/Resources  
Work Schedule(1011)  
Emp Group/Subgroup(1013)

Time period  
From 16.04.2018 to 31.12.9999  
 Period  
 All  
 From curr.date  
 To current date  
 Current week  
 Current month  
 Last week  
 Last month  
 Current Year

Select.

Select Radio button All in Time Period

Select Create Button or use button F5 .

Post: Accountant Accountant  
 Planning Status: Active  
 Valid from: 01.01.1800 to 19.10.1997 Change Information

Emp Group/Subgroup(1013) 01 S 30000507 1  
 EE Group:   
 EE subgroup:

Post Code / Text  
 Post Code:   
 Order Number:   
 Org.key:

Now give Employee Group And Subgroup.

After Giving Emp Group and Subgroup give Post Code

Post: Accountant A  
 Planning Status: Active  
 Valid from: 01.01.1800 t

Emp Group/Subgroup(1013) 01 S 30000507 1  
 EE Group: 4 Group C  
 EE subgroup: 40 Postal Assistant(PA)

Post Code / Text  
 Post Code:   
 Order Number:   
 Org.key:

Post Text 263 Entries

Cl.	Post Code	Post Text
400	0001	Secretary PSB
400	0002	Secretary(Posts)&Chairman PSB&DG Posts
400	0003	Member (Operations)
400	0004	Member (Planning)
400	0005	Member (HRD)
400	0006	Member (Personnel)
400	0007	Member (Technology)
400	0008	Member PLI&ChairmanPLI Investment Board
400	0009	Joint Secretary & Financial Advisor
400	0010	Personal Staff Of Director General
400	0011	Deputy Director General (Philately)
400	0012	Deputy Director General (Personnel)
400	0013	Deputy Director General (ESTT)
400	0014	Deputy Director General (REC VIG PET)
400	0015	Deputy Director General(Financial Serv)
400	0016	Deputy Director General (PMU)
400	0017	Chief General Master (PLI)
400	0018	General Manager (PLI)
400	0019	General Manager (RPLI)
400	0020	Deputy Director General (Work Study)
400	0021	Deputy Director General (Vigilance)
400	0022	Director Vigilance
400	0023	Assistant Director General (Vigilance)
400	0024	Section Officer (Vigilance)
400	0025	Inspector Of Posts (Vigilance)
400	0026	Assistant Superintendent Of Posts (Vigil
400	0027	Assistant (Vigilance)
400	0028	Assistant Director General (INV)
400	0029	Section Officer (INV)
400	0030	Inspector Of Posts (INV)
400	0031	Assistant Superintendent Of Posts (INV)
400	0032	Assistant (INV)
400	0033	Deputy Director General (IR)

After Giving Post Code Select Save Button or use Ctrl+S to save the information

## New Post Creation

Tcode : ZHR\_ERCREATE

In case you want to create new post if your ER is not matching after checking in ZHR\_ERDETAILS. You can use the tcode ZHR\_ERCREATE to create required number of posts in your office.



Please upload the excel attached for new post creations.



ER New Post  
Creation.xlsx

The excel has **dropdown for Post selection**.

There are three columns in the excel. The first column is for adding the facility id of the office where you want to create new posts, second column for selecting concerned post from dropdown and third column for adding no of post needed to be created.

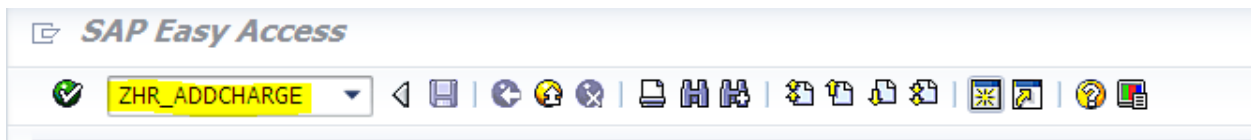
## Additional Charge

### Purpose

To give additional charge to other employee if the current employee is on leave/Training etc.

### Steps to follow to give additional charge

**Transaction Code:** ZHR\_ADDCHARGE



3. The User clicks on enter and the selection screen is displayed as shown below.

### Process Flow:

User can give additional charge to vacant post or to existing employee who is on leave/training etc.

If user wants to give additional charge in place of existing employee, then user needs to click **Employee Radio Button** or if user wants to give additional charge of vacant post, then he/she needs to click on **Post Radio Button**.

To give additional charge to an employee,

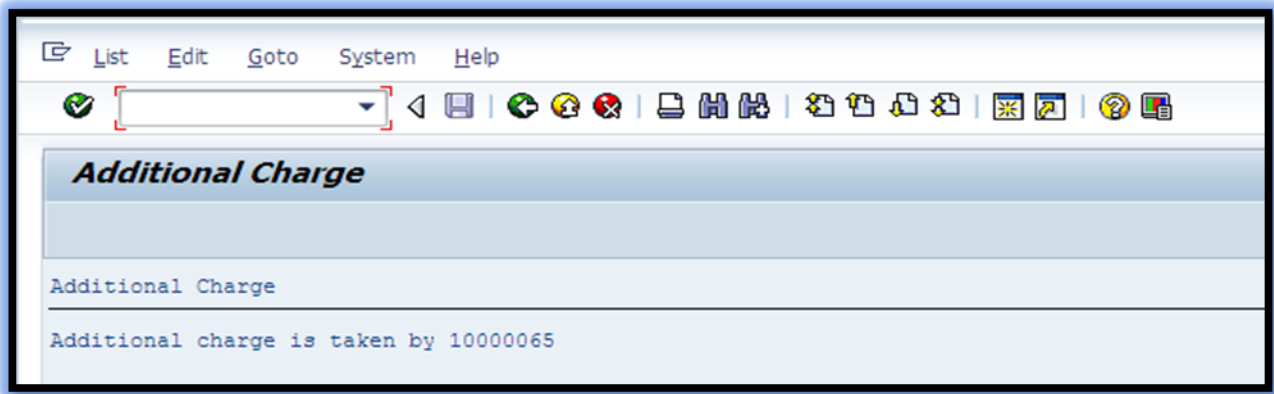
1. User needs to select Employee radio button
2. In **Employee field**, user has to provide the employee ID of the employee who is going on leave/Training and in **Additional Employee Number field** user has to give the employee Id of the employee who is taking additional charge.
3. User has to provide start date and end date of additional charge in the **date field**, which is mandatory.

To give additional charge on vacant post,

1. User needs to select Post radio button
2. In **Post field**, User has to provide the vacant post and in **Additional Employee Number field**, user has to give the employee Id of the employee who is taking additional charge.
3. User has to provide start date and end date of additional charge in the **date field**, which is mandatory.

After giving all the details, press execute (F8) and you will be displayed with a success message as follows.





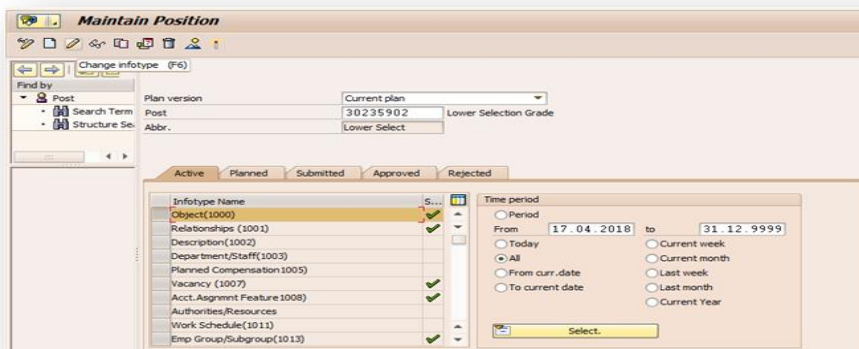
## Transfer of employee from CSI to Non CSI

Go to PA30 and to Infotype 0000.

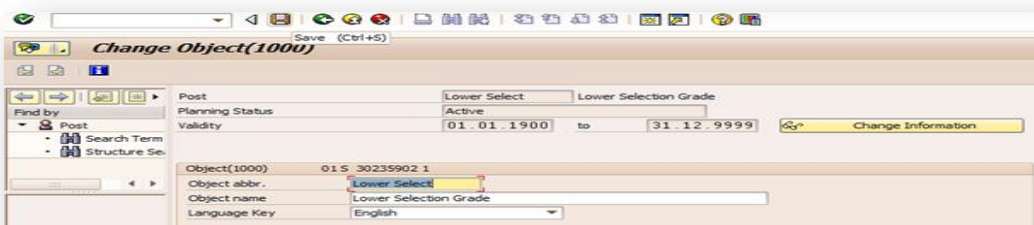
Copy the latest infotype and change the date, (should always be N+1), the Action Type as 'Transfer' and change the post as 99999999 and save. This will take you to IT0001, change the Payroll Area to 99 and save the infotype too. In between system will prompt few messages please press enter.

## Change the designation of the employee

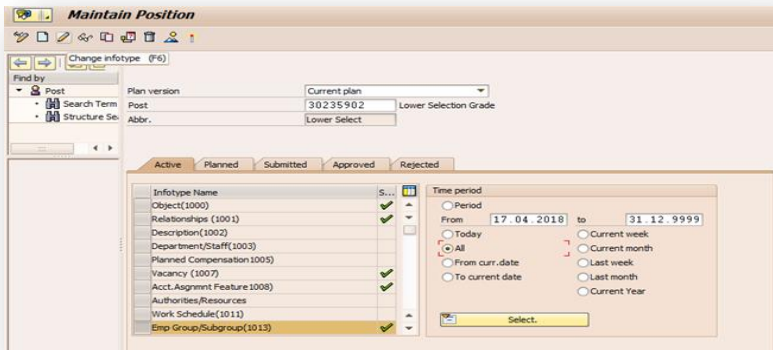
Provide the postid of the employee in po13, select radio button all under time period, select infotype object and click change infotype button( pen symbol) as shown below.



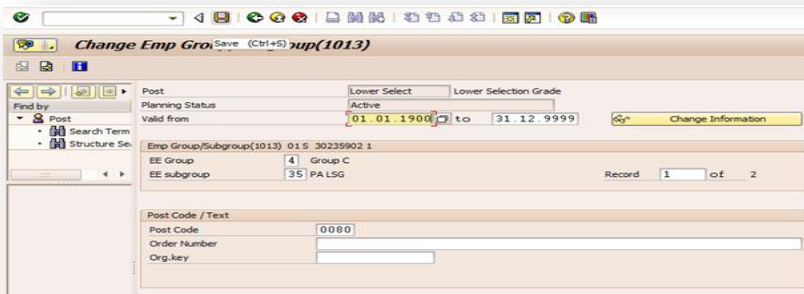
Change the Object abbr. and Object name and click save button as shown below. If you get any message in yellow other than record changed hit enter.



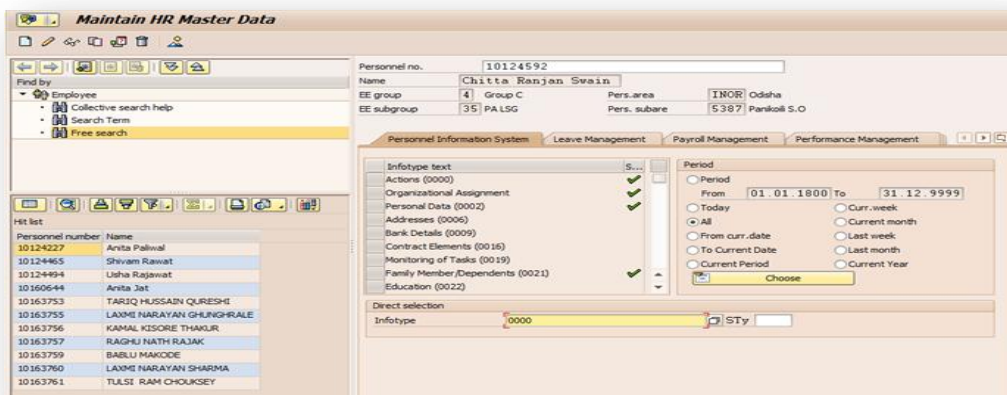
Now select Employee group/Subgroup and click change button.



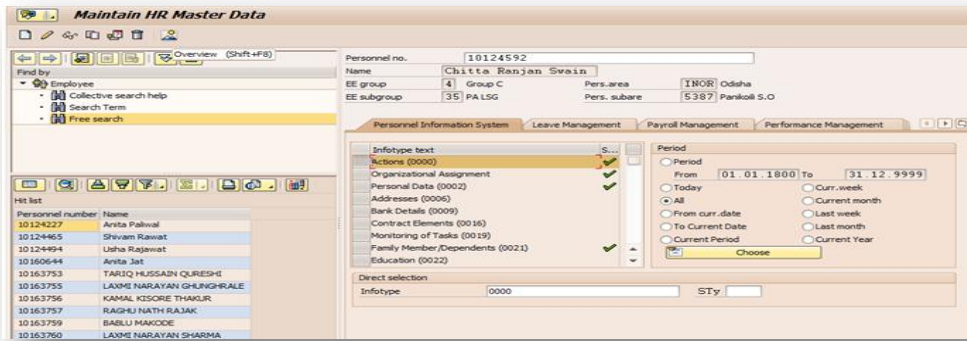
Change the EE Group, EE subgroup and Post Code and click save button. If you get any message in yellow other than record changed hit enter.



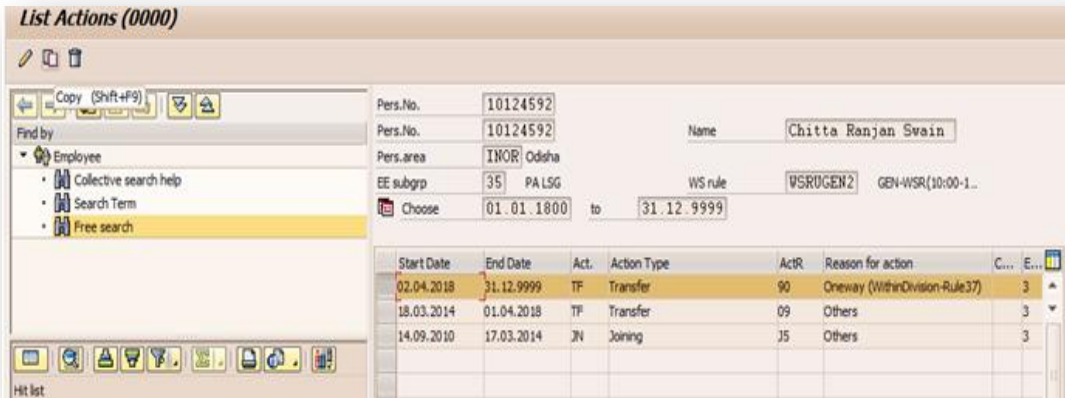
Now go to PA30 and give the employee id of that employee. Select radio button All in Period and give infotype number 0000 as shown below. Hit enter.



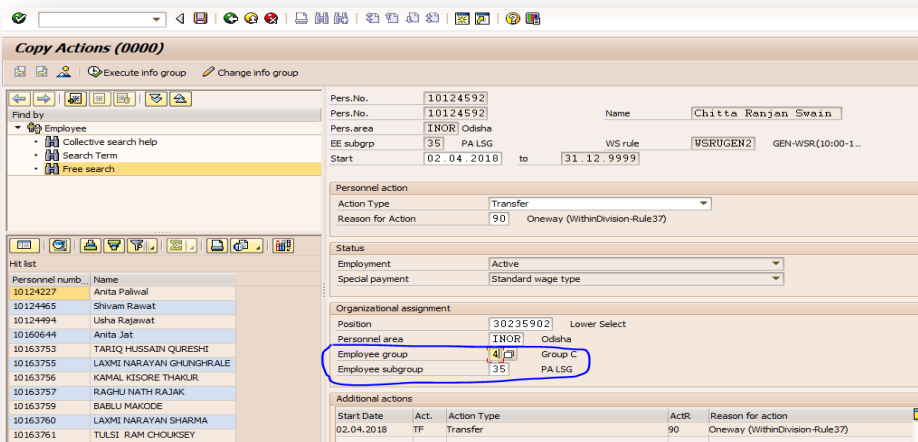
The Action infotype is selected and click on overview button as shown below.



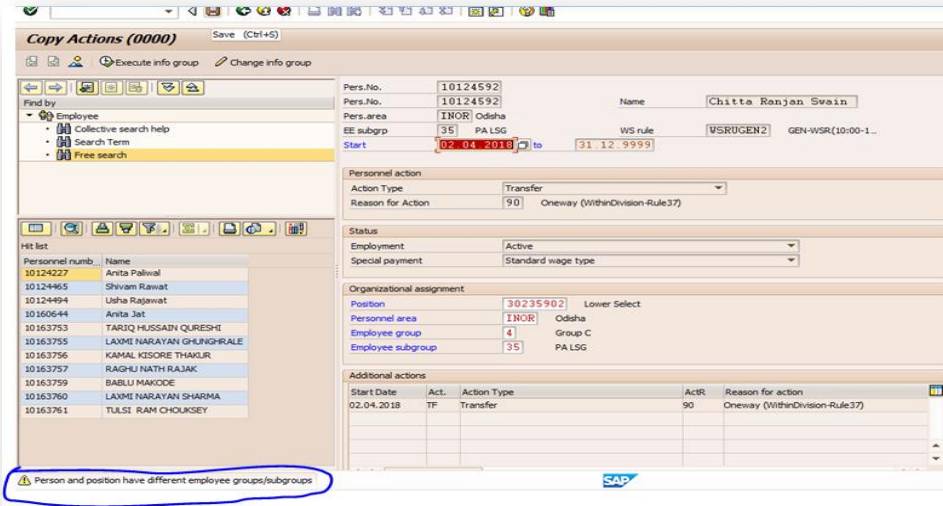
Latest entry is selected and click on copy button as shown below.



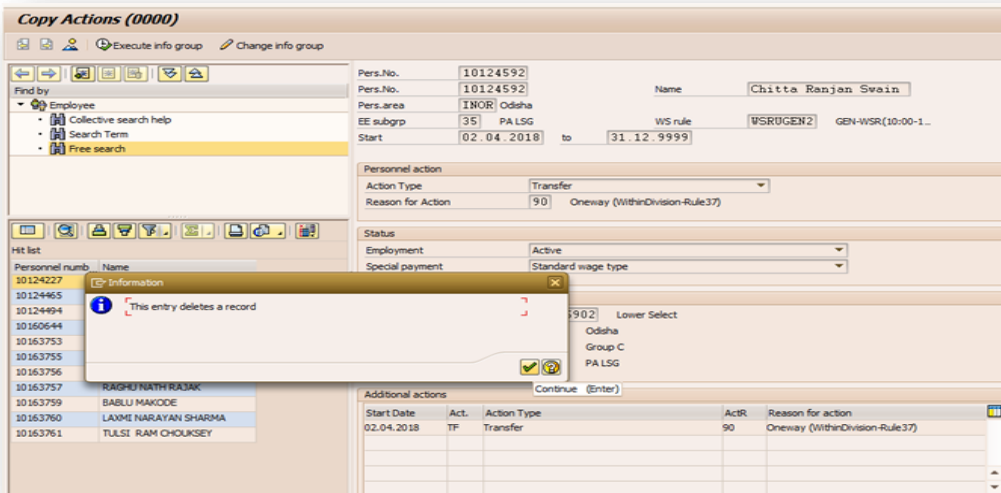
Only change the employee group and subgroup highlighted below. No other data to be changed.



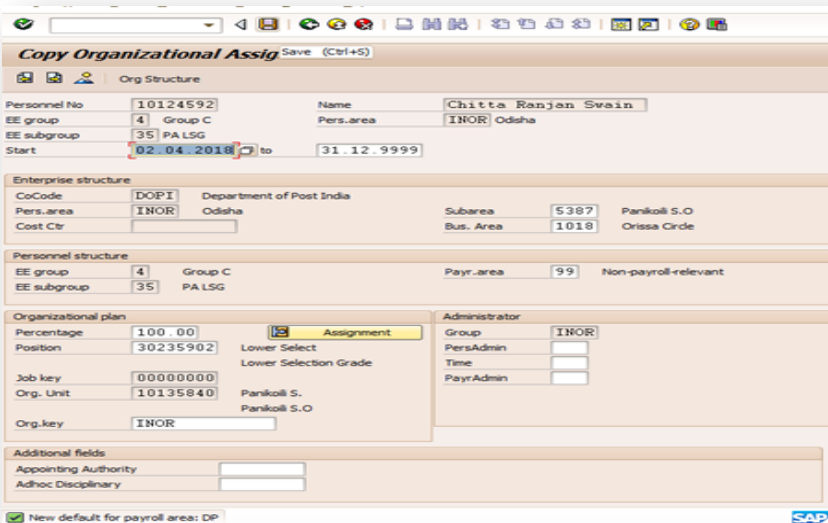
Click on save button you get the below message highlighted.



Hit enter button and click on continue button as shown below.



You will get the copy organizational assignment screen. Click on save button.



You get the below screen with highlighted message.

**Copy Organizational Assignment**

Personnel No: 10124592 Name: Chitta Ranjan Swain  
EE group: 4 Group C Pers.area: INOR Odisha  
EE subgroup: 35 PA LSG  
Start: 02.04.2018 to 31.12.9999

Enterprise structure  
CoCode: DOPI Department of Post India  
Pers.area: INOR Odisha Subarea: 5387 Pankoli S.O  
Cost Ctr: Bus. Area: 1018 Orissa Circle

Personnel structure  
EE group: 4 Group C Payr.area: 99 Non-payroll-relevant  
EE subgroup: 35 PA LSG

Organizational plan  
Percentage: 100.00 Assignment  
Position: 30235902 Lower Select  
Job key: 00000000 Lower Selection Grade  
Org. Unit: 10135840 Pankoli S.  
Org.key: Pankoli S.O

Administrator  
Group: INOR  
PersAdmin:   
Time:   
PayrAdmin:   
Appointing Authority:   
Adhoc Disciplinary:   
This entry deletes a record

Hit Enter button and you get message record created.

**List Actions (0000)**

Pers.No.: 10124592 Name: Chitta Ranjan Swain  
Pers.area: INOR Odisha  
EE subgrp: 35 PA LSG WS rule: WSRÜGENZ GEN-WSR(10:00-1...  
Choose: 01.01.1800 to 31.12.9999

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C...	E...
02.04.2018	31.12.9999	TF	Transfer	90	Oneway (WithinDivision-Rule37)	3	▲
18.03.2014	01.04.2018	TF	Transfer	09	Others	3	▼
14.09.2010	17.03.2014	JN	Joining	35	Others	3	

Entry 1 of 3  
Record created

After completing this whole process the concerned employee's designation is changed.

## **Retirement Process**

Please follow the attached document for the retirement process flow.

### **Module : Personal Information System**

#### **Applications Covered:-**

#### **Retirement Processes:**

- i) Resignation/Voluntary Retirement**
- ii) Retirement on Superannuation**
- iii) Retirement on Employee Death**

#### **Charge Report:**

- i) Relinquish Charge Report**

#### **Application: Retirement Process**

- There are various Retirement Processes in PIS as shown below.
  - Resignation/Voluntary Retirement
  - Retirement on Superannuation
  - Retirement on Employee Death

#### **i) Resignation/Voluntary Retirement:**

Resignation/Voluntary retirement request should be raised by Employee in ESS Portal, Following the below Path.

**Path: Employee Self Service → Personal Information → Initiate Retirement**

*Note: Allow pop-ups if the window is not opening.*

- ✓ After Clicking on Initiate Retirement Link, a screen will be displayed as shown below. (**Refer Image I**).

The screenshot shows a web form titled "Exit Process". It contains the following fields and elements:

- Retirement Type:** A dropdown menu with a yellow background, currently showing "Voluntary".
- Date:** A text input field.
- \* Reason:** A text input field.
- Submit Button:** A yellow button with the text "Submit", which is highlighted with a red rectangular border.
- Dropdown Menu:** A list of retirement reasons is displayed below the "Retirement Type" dropdown, including: Voluntary, Resignation, Superannuation, Compulsory, Removal, Dismissal, Invalidation, and Death.

**Image 1**

- ✓ Please select the Type of Retirement, Voluntary/Resignation, Retirement Date, Reason for For Activity and Finally Click on **Submit** Button as hilghited in Image Above.
- ✓ After Clicking on Submit Button Success Message will be displayed as shown below(*Refer Image 2*).

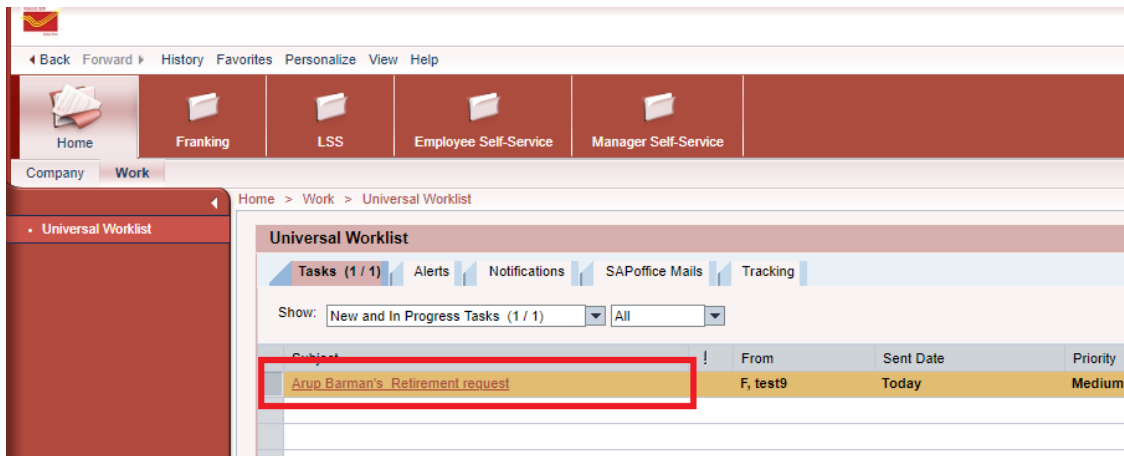
The screenshot shows the "Exit Process" form after submission. It includes a success message and the form fields with their values:

- Success Message:** A green checkmark icon followed by the text "The process has been submitted successfully", which is highlighted with a red rectangular border.
- Retirement Type:** A dropdown menu showing "Voluntary".
- Date:** A text input field containing "09.03.2018".
- \* Reason:** A text input field containing "Please Approve my Retirement Request".
- Submit Button:** A yellow button with the text "Submit".

**Image 2**

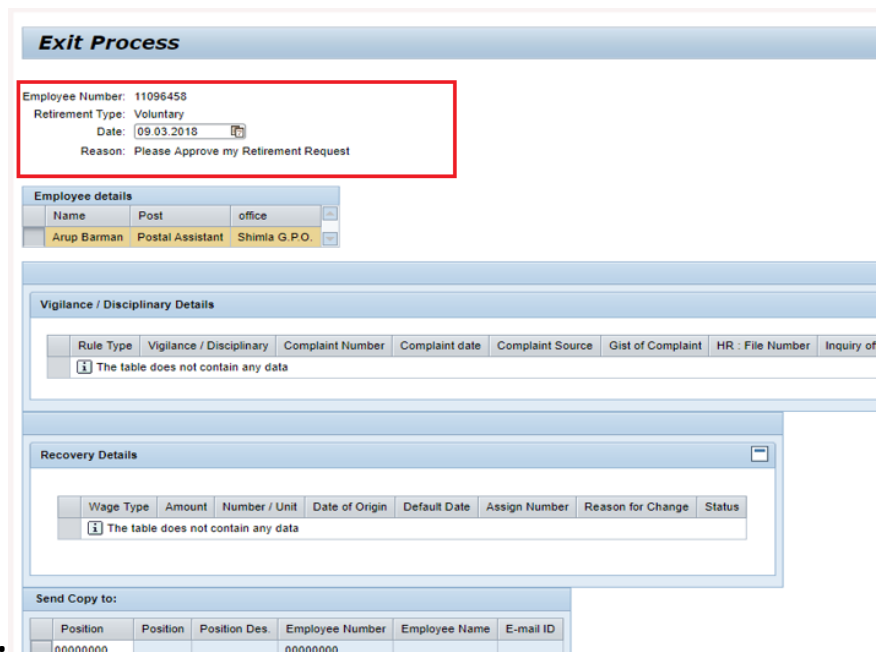
- ✓ Now The Retirement Request Initiated above by employee will go to Appointing Authority for Approval.
- ✓ Log in with Appointing Authority in Employee Portal and please find the Employee request in path shown below.

**Path:** Home → Work → Task



**Image 3**

- ✓ Please Find the Retirement request raised by Employee in Inbox as shown above. **(Refer Image 3).**
- ✓ Click on the Request and a screen will be displayed as Shown Below for Approval.



**(Refer Image 4).**

**Image 4**

- ✓ Appointing Authority can enter Comments if any and also he can view the **Retirement Order** of Employee as shown below. **(Refer Image 5)**



**Recovery Details**

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	Status
The table does not contain any data							

Send Copy to:

Position	Position	Position Des.	Employee Number	Employee Name	E-mail ID
00000000			00000000		

+ Add Line    Delete Line

Rejection Reason:

Approve    Retirement order    Reject

**Image 5**

- ✓ Retirement Order is shown below. (Refer Image 6)

(TO BE PUBLISHED IN PART I SECTION 2 OF THE GAZETTE OF INDIA)

**No.0000011660/Arup Barman/09.03.2**  
 Government of India  
 Ministry of Communications and IT  
 Department of Posts  
 (Personnel Division)  
 \*\*\*\*\*

Dak Bhavan  
 Dated: 09.03.2018

Notification

No. 0000011660/Arup Barman/09.03.2 : Arup Barman ( Postal Assistant(PA) ) Postal Assistant (Postal Operations), has Voluntary retired from Government service w.e.f. 06.06.2018 under Rule 48 (1) of CCS ( Pension ) Rules, 1972.

Patel Mukund  
 Approver2

**Image 6**

- ✓ Appointing Authority then clicks on Approve/Reject and a Success Message will be displayed as shown below. . (Refer Image 7)

The process has been approved successfully

### Exit Process

Employee Number: 11096458  
 Retirement Type: Voluntary  
 Date: 09.03.2018  
 Reason: Please Approve my Retirement Request

Employee details			
Name	Post	office	
Arup Barman	Postal Assistant	Shimla G.P.O.	

**Image 7**

- ✓ Now with the Approval, Resignation on Retirement process is completed. Now Employee has to take **Charge Report**, which will be discussed in the end as it is same for all the Retirement Processes.

**ii) Retirement on Superannuation:-**

Retirement on Superannuation will be initiated by **Reporting Manager(911)** in Employee portal by following the below path.

**Path: Manager Self Service(MSS) → Team → Administrative Transfer → Initiate Retirement.**

A screen will be displayed when Manager clicks on Initiate Retirement Link to Enter employee Number for whom Retirement to be initiated. **(Refer Image 8)**

### Exit Process

\* Employee Number: 11096478  
 \* Retirement Type: Superannuation  
 Date:  
 Reason:

**Get Details**

Employee details			
Name	Post	office	

#### Vigilance / Disciplinary Details

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR :
The table does not contain any data						

## Image 8

- ✓ Manager has to enter the employee number and date of retirement and reason if any.
- ✓ Click on Get Details Button as shown, when manager clicks the button employee details will be displayed as shown below (*Refer Image 9*)

**Exit Process**

\* Employee Number:

\* Retirement Type:

Date:

Reason:

**Employee details**

Name	Post	office
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File No
The table does not contain any data						

## Image 9

- ✓ Click on the **Initiate Process** as shown below. (*Refer Image 10*)

**Employee details**

Name	Post	office
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File No
The table does not contain any data						

**Recovery Details**

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	Status
The table does not contain any data							

## Image 10

- ✓ After clicking on **Initiate Process** Button, a success message will be displayed. **(Refer Image 11)**

The process has been initiated successfully

### Exit Process

\* Employee Number: 11096478

\* Retirement Type: Superannuation

Date: 23.03.2018

Reason: enjoy bacha

[Get Details](#)

Employee details			
Name	Post	office	
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O	

Vigilance / Disciplinary Details					
Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Comp

**Image 11**

- ✓ After initiation of request it will come to Approval to Manager Itself. **(Refer Image 12)**
- ✓ Manager can find the Approval request in path shown below.

**Path: Home → Work → Task**

Home > Work > Universal Worklist

Universal Worklist

Tasks (9 / 9) Alerts Notifications SAPoffice Mails Tracking

Show: New and in Progress Tasks (9 / 9) All

Subject	From	Sent Date
Gobinda Chandra Nath's Retirement request	F, test5	Today
JIMRAN AHMED's Retirement request	F, test5	Yesterday
Ajit Kumar's Retirement request	F, test5	Mar 1, 2018
Charge Report for Emp ID US11096453 - Req ID : 1000025094	F, test5	Mar 1, 2018
M Suman's '11096450' Earned Leave (EL) Request	F, test1	Feb 27, 2018
M Suman's Motorcycle / Scooter advance Request	F, test1	Feb 23, 2018
Charge Report for Emp ID US11096450 - Req ID : 1000024197	F, test5	Feb 19, 2018
Akkas Ali's LTC permission Request	F, test2	Feb 19, 2018
Akkas Ali's TA bill on Tour	F, test2	Feb 19, 2018

**Image 12**

- ✓ When manager clicks on Request a screen will be displayed showing the details filled while initiating the request. **(Refer Image 13)**

**Exit Process**

Employee Number: 11096478  
 Retirement Type: Superannuation  
 Date: 23.03.2018  
 Reason: enjoy bacha

**Employee details**

Name	Post	office
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File Numt
The table does not contain any data						

**Recovery Details**

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	Status
The table does not contain any data							

**Image 13**

- ✓ Manager can Approve/Reject the request and can write comments if any and can view the Retirement order as we have seen in Resignation. **(Refer Image 14)**

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint
The table does not contain any data					

**Recovery Details**

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	St
The table does not contain any data							

**Send Copy to:**

Position	Position	Position Des.	Employee Number	Employee Name	E-mail ID
00000000			00000000		

+ Add Line    Delete Line

Approved

Rejection Reason:

Approve   Retirement order   Reject

**Image 14**

- ✓ After Clicking on Approve/reject button, a success message will be displayed as shown. **(Refer Image 15)**

The process has been approved successfully

### Exit Process

Employee Number: 11096478  
 Retirement Type: Superannuation  
 Date: 23.03.2018  
 Reason: enjoy bacha

Employee details		
Name	Post	office
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O

Vigilance / Disciplinary Details						
Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File Num
The table does not contain any data						

**Image 15**

- ✓ Process is completed, Now Employee has to take **Charge Report**. From Manager, which we will be discussing later as it is same for all types of retirement.

### iii) Retirement on Employee Death :-

Retirement on Death will be initiated by **Appointing Authority(929)** Manager screen by following the Below Path.

**Path:** Manager Self Service → Team → Administrative Transfer → Initiate Retirement.

When Appointing Authority clicks on the link, a screen will be displayed as shown(*Refer Image 16*)

As discussed earlier, Authority has to enter Employee Id, Retirement Type and Date of Retirement Date and clicks on Get Details Button.

**Exit Process**

\* Employee Number: 11096483

\* Retirement Type: Death

Date: 23.03.2018

Reason: So sad

**Get Details**

**Employee details**

Name	Post	office
Gokul Chandra Das	Senior Superintendent of Posts	Shimla G.P.O

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File Number
The table does not contain any data						

**Image 16**

- ✓ When Appointing Authority clicks on **Get Details**, Employee details will be fetched from system. *(refer Image 17)*
- ✓ Authority initiates the Request as shown below.

**Get Details**

**Employee details**

Name	Post	office
Gobinda Chandra Nath	Senior Superintendent of Posts	Shimla G.P.O

**Vigilance / Disciplinary Details**

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : File Number
The table does not contain any data						

**Recovery Details**

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	Status
The table does not contain any data							

**Initiate Process**

**Image 17**

- ✓ When Authority clicks on Initiate Process radio button, a success screen will be displayed as shown below. *(Refer Image 18)*

The process has been initiated successfully

### Exit Process

\* Employee Number:

\* Retirement Type:

Date:

Reason:

[Get Details](#)

Employee details		
Name	Post	office
Gokul Chandra Das	Senior Superintendent of Posts	Shimla G.P.O

Vigilance / Disciplinary Details						
Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR : Fil
The table does not contain any data						

**Image 18**

- ✓ Now the Workflow will go to **Reporting Manager (911)** for approval.(refer **Image 19**)

Home > Work > Universal Worklist

Universal Worklist

Tasks (9 / 9) | Alerts | Notifications | SAPoffice Mails | Tracking

Show:

Subject	From	Sent Date	Pri
<a href="#">Gokul Chandra Das's Retirement request</a>	F, test6	Today	Me
<a href="#">IMRAN AHMED's Retirement request</a>	F, test5	Yesterday	Me
<a href="#">Ajit Kumar's Retirement request</a>	F, test5	Mar 1, 2018	Me
<a href="#">Charge Report for Emp ID US11096453 - Req ID : 1000025094</a>	F, test5	Mar 1, 2018	Me
<a href="#">M Suman's '11096450' Earned Leave (EL) Request</a>	F, test1	Feb 27, 2018	Me
<a href="#">M Suman's Motorcycle / Scooter advance Request</a>	F, test1	Feb 23, 2018	Me

**Image 19**

- ✓ When Manager Clicks on the Notification, a screen will be displayed for Approval.(Refer **Image 20**)



**Exit Process**

Employee Number: 11096483  
 Retirement Type: Death  
 Date: 23.03.2018  
 Reason: So sad

Employee details		
Name	Post	office
Gokul Chandra Das	Senior Superintendent of Posts	Shimla G.P.O

Vigilance / Disciplinary Details

Rule Type	Vigilance / Disciplinary	Complaint Number	Complaint date	Complaint Source	Gist of Complaint	HR . File Number	Inquiry officer Name	Pr
The table does not contain any data								

Recovery Details

Wage Type	Amount	Number / Unit	Date of Origin	Default Date	Assign Number	Reason for Change	Status
The table does not contain any data							

**Image 20**

- ✓ When Manger Clicks on Approve/Reject a screen will be displayed. (Refer Image 21)

The process has been approved successfully

**Exit Process**

Employee Number: 11096483  
 Retirement Type: Death  
 Date: 23.03.2018  
 Reason: So sad

Employee details		
Name	Post	office
Gokul Chandra Das	Senior Superintendent of Posts	Shimla G.P.O

**Image 21**

- ✓ Now the process is complete, Manager has to initiate Charge report for employee. Charge Report will be discussed next which is same for all the Retirement Processes.

**Charge Report:**

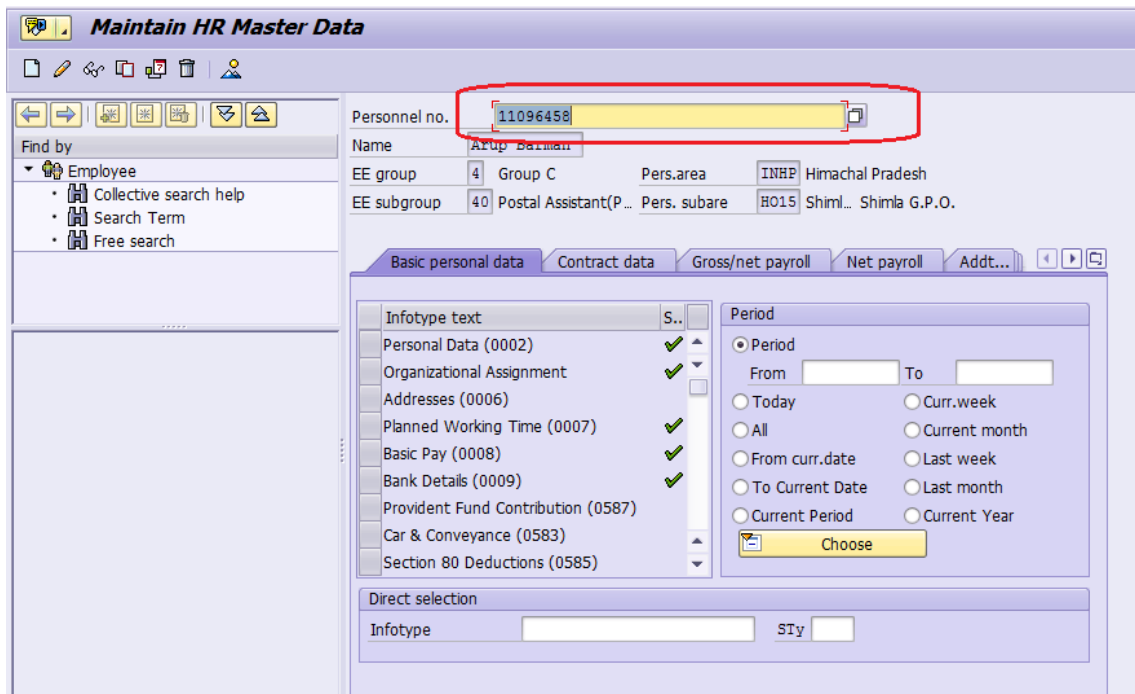
Charge Report will be initiated by **Reporting Manager (911)** in Employee Portal.

Before Initiating the Charge Report Manager has to Login to SAP and go to Transaction **PA30** to change the Retirement Date in system.

When Employee is hired in system Retirement date will be automatically captured in system according to date of Birth in Infotype **IT0041**, In case of Employee Resignation and

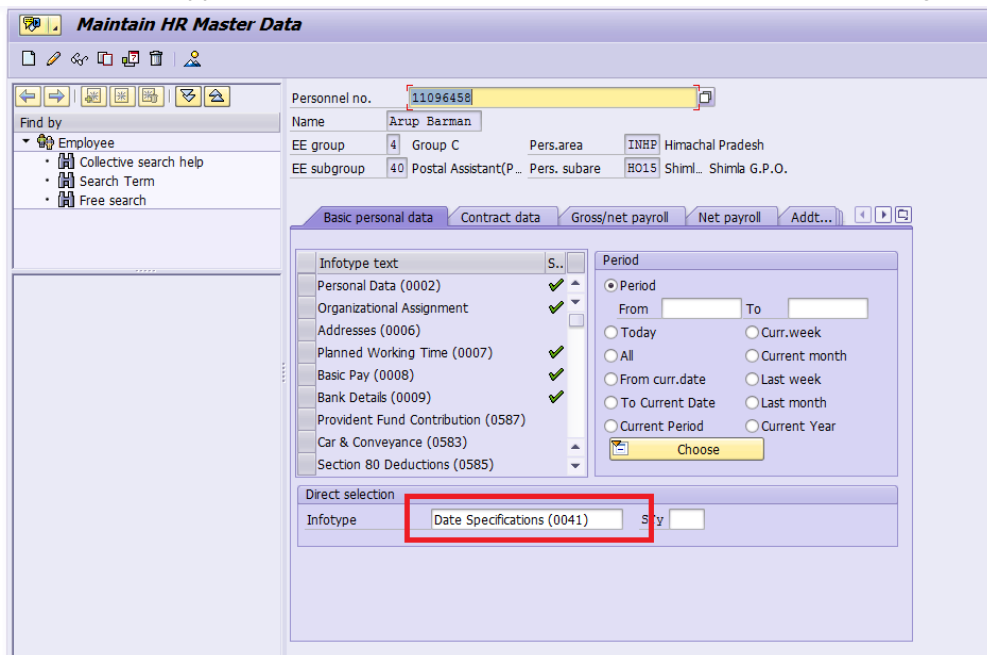
Employee death Manager has to change the retirement date in **IT0041** in PA30 Screen. Process is shown below.

Go to PA30 Transaction and enter employee number as shown below. **(Refer Image 22)**



**Image 22**

\*Select Infotype IT0041 and click on Edit as shown below. **(Refer Image 23)**



**Image 23**

\*If it is already created Manager can see the N0 and Z6 entries of retirement date in screen shown below. **(Refer Image 24)**

Pers.No.	11096458	Name	Arup Barman		
Pers.area	INHP Himachal Pradesh	Cost Ctr	1812510000	Shimla G.P.O.	
EE subgrp	40 Postal Assistant(PA)	WS rule	WSRUGEN1	GEN-WSR(09:...	
Start	01.01.2000	to	31.12.9999	Chng	08.03.2018 11096559

Date Specifications (0041)			
Date type	Date	Date type	Date
N0 Date of Retirement	01.01.2045	Z6 Retirement Date	01.01.2045

**Image 24**

*\*Enter the actual Date of Resignation/Death of Employee in place of dates shown in system and save.(Refer Image 25)*

Pers.No.	11096458	Name	Arup Barman		
Pers.area	INHP Himachal Pradesh	Cost Ctr	1812510000	Shimla G.P.O.	
EE subgrp	40 Postal Assistant(PA)	WS rule	WSRUGEN1	GEN-WSR(09:...	
Start	01.01.2000	to	31.12.9999	Chng	08.03.2018 11096559

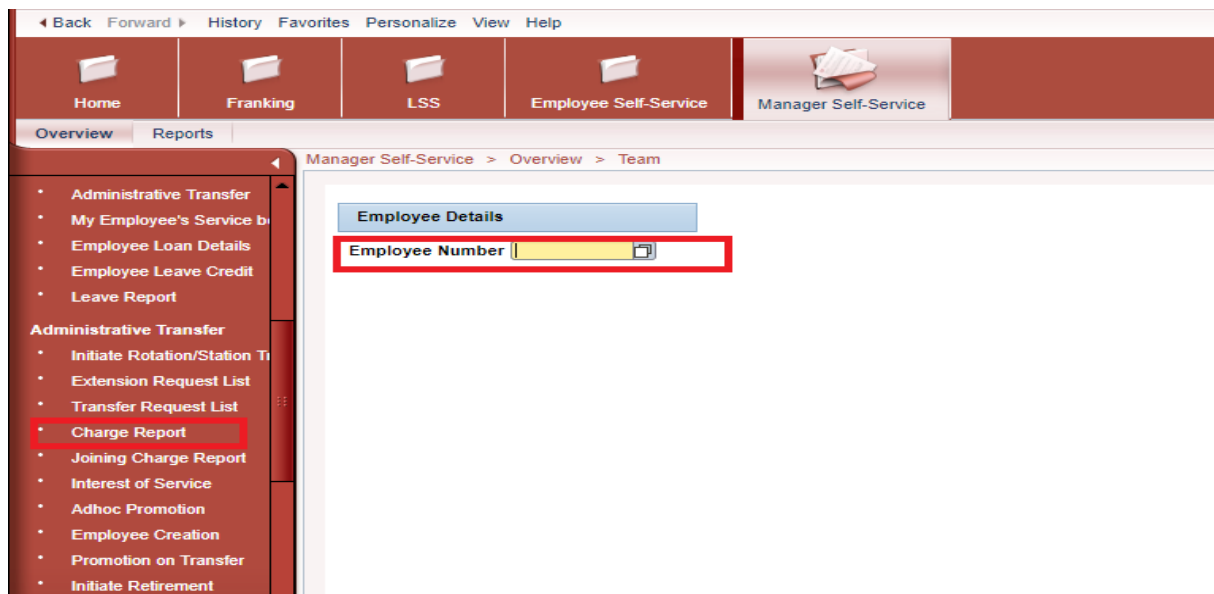
Date Specifications (0041)			
Date type	Date	Date type	Date
N0 Date of Retirement	09.03.2018	Z6 Retirement Date	09.03.2018

**Image 25**

\*Now Manager can Initiate The Charge report for Employee by following below path.

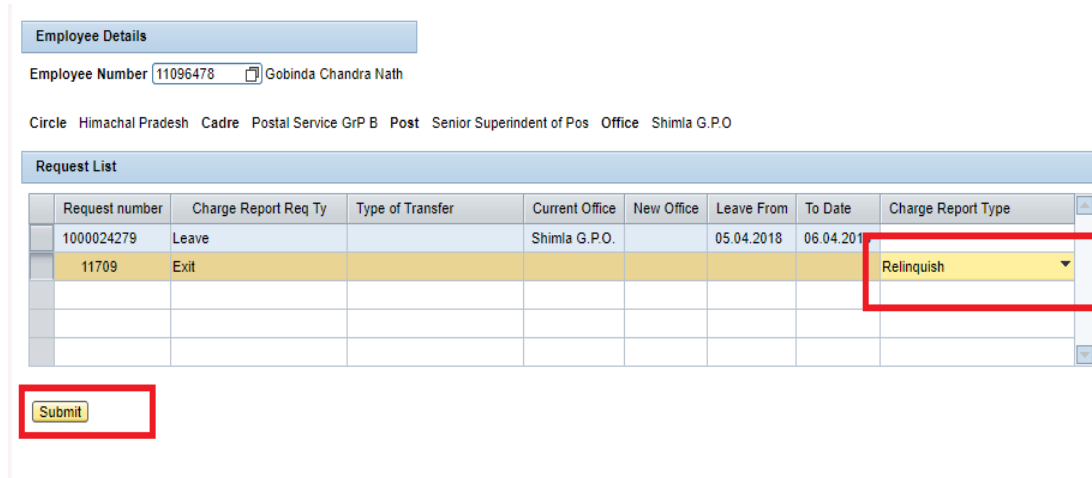
**Path: Manager Self Service → Team → Administrative Transfer → Charge Report**

\*Enter employee number and press enter. (Refer Image 26)



**Image 27**

\*Select the Exit type charge report and Select Relinquish type click on Submit.(refer **Image 28**)



**Image 29**

\*When Manage clicks on Submit a screen will be displayed, where in manager has to enter the date of Charge Report and for/after noon.(Refer **Image 30**)

**DEPARTMENT OF POSTS, INDIA**  
 (See Rule 267, Posts and Telegraphs Financial Handbook, Volume I, Second Edition)  
 Charge Report and Receipt for cash and stamps on transfer of charge

Certified that the charge of office of Senior Superintendent of Posts was made over by name Gobinda Chandra Nath to name \_\_\_\_\_ at place \_\_\_\_\_

\* Relinquish on the date 23.03.2018 at place \_\_\_\_\_ in accordance with: \_\_\_\_\_

From 0000011709 Dated \_\_\_\_\_

Relieved Officer

Relieving Officer

\*Certified that the balances of this date of the several books(including stock book and registers) and accounts of the office have been checked and found correct  
 \*Certified that the balances as detailed below were handed over to me by the Relieved Officer and I accept the responsibility for the same.

Amount & Stamp Details	Rs	P
(A) Cash	0.00	0.00
(B) Stamp Imprest	0.00	0.00
Made up of :-		

**Image 31**

\*Manager Clicks on Submit button to initiate charge report. (Refer Image 32)

Charge Report submitted successfully

---

**DEPARTMENT OF POSTS, INDIA**  
 (See Rule 267, Posts and Telegraphs Financial Handbook, Volume I, Second Edition)  
 Charge Report and Receipt for cash and stamps on transfer of charge

Certified that the charge of office of \_\_\_\_\_ was made over by name \_\_\_\_\_ to name \_\_\_\_\_ at place \_\_\_\_\_

\* \_\_\_\_\_ in accordance with: \_\_\_\_\_

From 0000000000 Dated \_\_\_\_\_

Relieved Officer \_\_\_\_\_ Relieving Officer \_\_\_\_\_

\*Certified that the balances of this date of the several books(including stock book and registers) and accounts of the office have been checked and found correct.  
 \*Certified that the balances as detailed below were handed over to me by the Relieved Officer and I accept the responsibility for the same.

Amount & Stamp Details	Rs	P
(A) Cash	0.00	0.00
(B) Stamp Imprest	0.00	0.00
Made up of :-		

**Image 32**

\*Now the Notification will go to Employee fill the charge report and when the employee fill the charger report a success message will be shown.(Refer image 33)

Submitted Successfully

DEPARTMENT OF POSTS, INDIA  
(See Rule 267, Posts and Telegraphs Financial Handbook, Volume I, Second Edition)  
Charge Report and Receipt for cash and stamps on transfer of charge

Certified that the charge of office was made over by name  
to name at place  
on the date 0000000000 Dated in accordance with:  
From

Relieved Officer

Relieving Officer

\*Certified that the balances of this date of the several books(including stock book and registers) and accounts of the office have been checked and found correct.  
\*Certified that the balances as detailed below were handed over to me by the Relieved Officer and I accept the responsibility for the same.

Amount & Stamp Details

	Rs	P
(A) Cash	0.00	0.00
(B) Stamp Imprest	0.00	0.00
Made up of :-		
(1) Stamps	0.00	0.00
(2) Cash	0.00	0.00

Image 33

\*When employee fills charge report notification will go back to Manager for Approval.  
When Manager Approves a success message will be displayed. (Refer Image 34)

Exit process run successfully

DEPARTMENT OF POSTS, INDIA  
(See Rule 267, Posts and Telegraphs Financial Handbook, Volume I, Second Edition)  
Charge Report and Receipt for cash and stamps on transfer of charge

Certified that the charge of office of Senior Superintendent of Posts was made over by name Gobinda Chandra Nath  
to name at place Shimla G.P.O  
\* Relinquish on the date 23.03.2018 After noon in accordance with:  
1000026899 Dated 23.03.2018  
From Gobinda Chandra Nath

Relieved Officer

Relieving Officer

\*Certified that the balances of this date of the several books(including stock book and registers) and accounts of the office have been checked and found corre  
\*Certified that the balances as detailed below were handed over to me by the Relieved Officer and I accept the responsibility for the same.

Amount & Stamp Details

	Rs	P
(A) Cash	10.00	10.00
(B) Stamp Imprest	10.00	10.00

Image 34