

PERSONNEL FORM REQUEST SYSTEM

(ALSO KNOWN AS EZ FORM OR I FORM PROCESSING)

The **PERSONNEL FORM REQUEST SYSTEM** can be used by individuals with existing security clearance for the Student, Transient and Graduate Assistant System. Otherwise, proper security clearance can be obtained by written request sent to the AgCenter Human Resource Management (HRM) Office. The letter should contain the name and logon identification of the employee responsible for online form additions. It must also be signed and approved by the appropriate Unit Head.

To use the system you should follow these steps:

1. Logon and access the HRM Primary Menu (if you are not familiar with this initial step, please contact the AgCenter HRM Office).
2. Select PF8 for the Miscellaneous menu (see Page 2).
3. Follow the option screen and enter **.. I .. FORM ..** and fill in the employee's **Social Security Number**; then hit the enter key.
4. This will give you a form request screen or "EZ FORM ENTRY MENU" which will allow you to select among several of the frequently used transactions (see bottom of Page 2).
5. Enter the effective date .. such as .. 07/01/2000 .
6. Select the letter that represents the transaction type .. such as .. **D** .. for Continuation of Appointment. Hit the enter key.
7. The next screen will contain the information that will be pre-printed on a personnel action document. It will also contain information that you enter such as dates, account numbers and dollar amounts. The system will edit your entries and prompt you for additional information, if necessary. Use the remarks area (2 lines) just as you would on the PER2 form. If your printer destination and mode are not listed, type it in. If forms are not able to be printed at your location, type in the HRM printer (AGCTR01; Mode P). Forms printed in the HRM office will be forwarded to you for signatures.
8. After all items for that action are filled in, hit the enter key. You should get a message indicating **.. ADD SUCCESSFUL**. The form will only print and be inserted into the HRM database when the **.. Add Successful ..** message is given.
9. Pages 3 through 8 provide samples of the entry screens. The shaded areas are the items you may be required to "fill in." If you fail to fill in a required item, the system will prompt you to do so before adding the form.
10. The Personnel Action Document (see Page 9) will print at the *Printer Destination* typed in on the second screen of the EZ Form (please remember to change the destination to your printer if it is not automatically listed.) **PLEASE PRINT THE DOCUMENT ON YELLOW PAPER AS THE SAMPLE INDICATES.**
11. The form will be held in a "Wait" status (see Page 10) until it is routed to the AgCenter HRM Office. Keep in mind that the form only becomes valid after all signatures have been obtained and the AgCenter HRM Office releases the form to payroll.
12. Should you discover an error after loading the form, you may correct the hard copy before submitting it. Once a form is added, it cannot be changed in the database except by the AgCenter HRM Office.

SAMPLE SCREENS

From the HRM Primary Menu, **press F8** to select the Miscellaneous/Department Menu.

HRMMENU Human Resources Management System Primary Menu Function Key	Description
PF1	Academic & Unclassified Menu
PF2	Classified Menu
PF3	Graduate School Menu
PF4	Budget and Planning Menu
PF5	Payroll Menu
PF6	Payroll Assist/Additional Comp Menu
PF7	HRM Code Tables Menu
PF8	Miscellaneous/Department Menu
PF9	Insurance Main Menu
PF10	SPIN Menu
PF11	Return to System Menu
PF12	Logoff of IMS

Enter the letter **.. I..**, the word **.. FORM ..** and the employee's **social security number** on the HRM Misc/Dept Menu screen to select EZ Employee Form Entry. (If you are familiar with the Transaction Screen [ATRNL], the same entry could be done from that screen.)

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HRM07                                HRM Misc/Dept Menu
OPT I FORM PA          SSN 999999999 POSN          EFFDT          FORM

  I Inq A Add C Chg D Del S Select    NAME
Option  Tran  Description              Key Required
I       CALC --- Class New Rate Calc Screen SSN
A,C,D,I TARD --- Treas Accts Receivable   SN
A,C,I   TRAM --- Traffic Payroll Deducts  SSN
S       EXCO --- Additional Compensation  SSN
C,I     CERT --- Stu/GA Immigration Cert  SSN
I       EMPL --- Employee Personnel Data  SSN/NAME
I       DSGT --- Student/Grad Assist Menu SSN
I       DTRN --- Stu/Grad Asst Trans Screen SSN
I     FORM --- EZ Employee Form Entry   SSN
I       CSCR --- Compensation Score       POSN
I       CONT --- List Empls Needing XCNA  MO/YR
V,A,C,D PFBN --- Employee Fringe Benefits SSN
  
```

After you hit the *enter* key, you will be given the **EZ Form Entry Menu** below. Proceed as instructed.

HRM13 Empl EZ Form Entry Menu

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OPT I FORM PA          SSN 999999999 POSN          EFF DT          FORM
NAME  DOE                JOHN          E
  
```

Effective date: **?????????** (MM/DD/CCYY)

Type of Transaction Requested: **?**

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change (do not use if title or position changes- must do a PER2)
- R = Retirement
- S = Separation

CHANGE IN SOURCE OF FUNDS & CONTINUATION

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 99999999 POSN EFF DT FORM

NAME BUGGS PESKY

Effective date: 07/01/2000 (MM/DD/CCYY)

Type of Transaction Requested: B

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

(SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA XCSF SSN 99999999 POSN 00000 EFF DT 07/01/2000 FORM 84792426

NAME BUGGS PESKY TITLE CODE: F731

NATURE OF ACTION: CHANGE IN SOURCE OF FUNDS & CONTINUA ANNUAL AMT: 22000

FROM DATE: 07/01/2000 TO DATE: 06/30/2000 FUND END DTE: 06/30/2000

% EFFORT: 100.00 PRINT FORM? Y

LEAVE WITHOUT PAY? RETURN FROM LEAVE? CONTINUE LEAVE?

OLD ACCT NO	OBJ	AMOUNT	PERCENT	*	NEW ACCT NO	OBJ	AMOUNT	PERCENT
903-XX-XXXX	1110	22000	100.00	*	903-XX-XXXX	1110	12000	
				*	903-XX-XXXX	1110	10000	

*
*
*
*
*

DATE LAST WORKED: DROP Y/N:
ANNUAL LEAVE PAID: SICK LEAVE BAL:

REMKs: CONTINUATION CONTINGENT UPON AVAILABILITY OF FUNDS.

PRINTER DESTINATION: ???????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)

ADD SUCCESSFUL FORM IS PRINTING

CONTINUATION OF APPOINTMENT

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 999999999 POSN EFF DT FORM

NAME GRAS MARTY

Effective date: 07/01/2000 (MM/DD/CCYY)

Type of Transaction Requested: D

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

(SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA XCNA SSN 999999999 POSN 000000 EFF DT 07/01/2000 FORM 84792426

NAME GRAS MARTY TITLE CODE: M819

NATURE OF ACTION: CONTINUATION OF APPOINTMENT ANNUAL AMT: 26000

FROM DATE: 07/01/2000 TO DATE: 06/30/2001 FUND END DTE:

% EFFORT: 100.00 PRINT FORM? Y

LEAVE WITHOUT PAY? RETURN FROM LEAVE? CONTINUE LEAVE?

OLD ACCT NO	OBJ	AMOUNT	PERCENT	*	NEW ACCT NO	OBJ	AMOUNT	PERCENT
920-XX-XXXX	1110	20000	76.92	*				
920-XX-XXXX	1119	6000	23.08	*				

*
*
*
*
*
*

DATE LAST WORKED: DROP Y/N:
ANNUAL LEAVE PAID: SICK LEAVE BAL:

REMKs: CONTINUATION CONTINGENT UPON AVAILABILITY OF FUNDS. ORLEANS PARISH

PRINTER DESTINATION: ???????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)
ADD SUCCESSFUL FORM IS PRINTING

LEAVE WITHOUT PAY

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 999999999 POSN EFF DT FORM

NAME BEAN SHELLY A

Effective date: 08/01/2000 (MM/DD/CCYY)

Type of Transaction Requested: L

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

(SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA XLVE SSN 999999999 POSN 000000 EFF DT 08/01/2000 FORM 84792426

NAME BEAN SHELLY A TITLE CODE: F731

NATURE OF ACTION: LEAVE WITHOUT PAY ANNUAL AMT: 25000

FROM DATE: 08/01/2000 TO DATE: 10/31/2000 FUND END DTE:

% EFFORT: 100.00 PRINT FORM? Y

LEAVE WITHOUT PAY? Y RETURN FROM LEAVE? CONTINUE LEAVE?

OLD ACCT NO	OBJ	AMOUNT	PERCENT	*	NEW ACCT NO	OBJ	AMOUNT	PERCENT
903-XX-XXXX	1110	25000	100.00	*				

*
*
*
*
*
*
*

DATE LAST WORKED: DROP Y/N:
ANNUAL LEAVE PAID: SICK LEAVE BAL:

REMKs: ILLNESS - EMPLOYEE EXHAUSTED ALL SICK LEAVE.

PRINTER DESTINATION: ???????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)
ADD SUCCESSFUL FORM IS PRINTING

PAY CHANGE

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 99999999 POSN EFF DT FORM
NAME BEAN SHELLY A

Effective date: 07/01/2000 (MM/DD/CCYY)

Type of Transaction Requested: P

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

(SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA USAJ SSN 99999999 POSN 000000 EFF DT 09/01/2000 FORM 84792426
NAME BEAN SHELLY A TITLE CODE: M827

NATURE OF ACTION: PROMOTION/SALARY ADJ/OTHER PAY CHANGE ANNUAL AMT: 40550
FROM DATE: 07/01/2000 TO DATE: FUND END DTE: 12/31/2004

% EFFORT: 100.00 PRINT FORM? Y

LEAVE WITHOUT PAY?		RETURN FROM LEAVE?			CONTINUE LEAVE?			
OLD ACCT NO	OBJ	AMOUNT	PERCENT	*	NEW ACCT NO	OBJ	AMOUNT	PERCENT
920-XX-XXXX	1110	36550	91.26	*	920-XX-XXXX	1110	36550	
920-XX-XXXX	1110	1500	3.75	*	920-XX-XXXX	1110	1500	
920-XX-XXXX	1110	2000	4.99	*	920-XX-XXXX	1110	2500	

DATE LAST WORKED: DROP Y/N:
ANNUAL LEAVE PAID: SICK LEAVE BAL:

REMKs: SALARY INCREASE DUE TO RETROACTIVE INCREASE IN LOCAL FUNDS PROVIDED BY THE ASCENSION PARISH SCHOOL BOARD. ASCENSION PARISH/DISTRICT 2

PRINTER DESTINATION: ?????????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)

ADD SUCCESSFUL FORM IS PRINTING

RETIREMENT

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 999999999 POSN EFF DT FORM
NAME WONDERLAND ALICE N

Effective date: 08/31/2000 (MM/DD/CCYY)

Type of Transaction Requested: R

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA PRET SSN 999999999 POSN 000000 EFF DT 08/31/2000 FORM 84792426
 NAME WONDERLAND ALICE N TITLE CODE: A713
 NATURE OF ACTION: RETIREMENT ANNUAL AMT: 60000
 FROM DATE: 08/31/2000 TO DATE: 08/31/2000 FUND END DTE:
 % EFFORT: 100.00 PRINT FORM? Y
 LEAVE WITHOUT PAY? RETURN FROM LEAVE? CONTINUE LEAVE?
 OLD ACCT NO OBJ AMOUNT PERCENT * NEW ACCT NO OBJ AMOUNT PERCENT
 903-XX-XXXX 1110 60000 100.00 *
 *
 *
 *
 *
 *
 *

DATE LAST WORKED: 08/31/2000 DROP Y/N: N
 ANNUAL LEAVE PAID: 300 SICK LEAVE BAL: 2500
 REMKS: VOLUNTARY RETIREMENT. SICK LEAVE PAID: 200 HRS.

PRINTER DESTINATION: ?????????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)
 ADD SUCCESSFUL FORM IS PRINTING

SEPARATIONS

(SCREEN ONE)

HRM13 Empl EZ Form Entry Menu

OPT I FORM PA SSN 999999999 POSN EFF DT FORM

NAME CONFUSED IAM V

Effective date: 10/31/2000 (MM/DD/CCYY)

Type of Transaction Requested: S

- A = Budget Adjustment - Add or Change
- B = Change in Source of Funds & Continuation
- C = Change in Source of Funds
- D = Continuation of Appointment
- E = Change in Percent of Effort
- L = Leave Without Pay (also use for Continuation of & Return from LWOP)
- P = Pay Change
- R = Retirement
- S = Separation

(SCREEN TWO)

HRM10 Empl EZ Form Entry Menu

OPT A FORM PA XSEP SSN 999999999 POSN 000000 EFF DT 06/30/2000 FORM 84792426

NAME CONFUSED IAM V TITLE CODE: M825

NATURE OF ACTION: SEPARATION ANNUAL AMT: 33200

FROM DATE: 10/31/2000 TO DATE: 10/31/2000 FUND END DTE:

% EFFORT: 100.00 PRINT FORM? Y

LEAVE WITHOUT PAY? RETURN FROM LEAVE? CONTINUE LEAVE?

OLD ACCT NO	OBJ	AMOUNT	PERCENT	*	NEW ACCT NO	OBJ	AMOUNT	PERCENT
920-XX-XXXX	1110	32000	100.00	*				
920-XX-XXXX	1110	1200		*				
				*				
				*				
				*				
				*				
				*				

DATE LAST WORKED: 10/20/2000 DROP Y/N:

ANNUAL LEAVE PAID: 176 SICK LEAVE BAL:

REMKs: ACCEPTED OUT OF STATE EMPLOYMENT. EMPLOYEE ON ANNUAL LEAVE 10/23/00-10/31/00.

EAST BATON ROUGE PARISH/DISTRICT 1

PRINTER DESTINATION: ?????????????? MODE: ? (P = PORTRAIT - L = LANDSCAPE)

ADD SUCCESSFUL FORM IS PRINTING

TRANSACTION SCREEN

A computer Program will insert a “waiting” form into the HRM Database and print a personnel action document (see Attachment 8) for the department/station to process.

HRM40

EMPL/POSN FORM ACTIVITY

OPT	I	ATRN	PA	SSN	999999999	POSN	EFFDT	FORM		
S	PA	ST	SSN	POSN	ST	FORM	BGT	PER APPR	PAY APPR	EFF DATE
ÿ	XCNA	W	999999999	000000	W	85032755			07/27/2000	07/01/2000
	XSME	C	999999999	000000	C	84973788	2000		09/24/1999	07/01/1999
	XCSF	H	999999999	000000	H	84862511			01/28/1998	01/01/1998

The Human Resource Analyst will review the hard copy, adjust if necessary and release to Payroll.

To access this screen, enter .. **I** .. **ATRN** .. and the employee’s **social security number**.