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            Louisiana State University
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 [ATRN], the same entry could be done from that screen.)

```
        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

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 **999999999** 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 **999999999** POSN **000000**   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 **999999999** 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 **999999999** 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

SAMPLE ONLY

```
DCODE: 903XX              LOUISIANA STATE UNIVERSITY          FORM: 85050064
LOGON: AGEXP99    CONTROLLING CAMPUS: LSU AGRICULTURAL CENTER     FORM: _____
                  DEPARTMENT: LA AG EXP STA

NATURE OF ACTION: CONTINUATION OF APPOINTMENT & CHANGE IN SOURCE OF FUNDS

EMPLOYEE NAME: BUGGS, PESKY                        SSN: 999-99-9999

TITLE CODE: F731        ASSOCIATE - RESEARCHSPECIALIST


POSITION NBR: 000000                              POSITION TYPE: P

                    CURRENT            *           PROPOSED
---------------------------------------*----------------------------------------
                                       *
EFFECTIVE DATE:    07/01/2000          *            07/01/2000
                                       *
PERS ACT END DATE: 06/30/2000          *            06/30/2000
                                       *
FUND END DATE:     06/30/2000      *            00/00/0000
                                       *
PAY BASIS:                21           *                 21
                                       *
SALARY:   31,046.00   2,587.17         *    31,046.00   2,587.17
                                       *
PERCENT EFFORT:          100           *                100
                                       *
******************************SOURCE OF FUNDS*********************************
   ACCOUNT       OBJ      AMOUNT          ACCOUNT       OBJ      AMOUNT
903-XX-0100     1110     31,046.00      903-XX-0100    1110     28,046.00
                                        903-XX-4XXX    1110      3,000.00




**  IF TERMINATING ENTER REASON: _____

LAST WORK DTE: _____  PAID ANNUAL LVE: _____  SICK LVE BAL: _____
REMARKS: REMOVE FORM DEQ GRANT FUNDING PER MEMO DATED 10/23/00 AND CONTINUATION
         ON REGULAR FUNDS.  DIVISION OF ENVIRONMENTAL SCIENCE
```

DEPT HEAD: _*Forward to HRM after*_____ DATE: _____

DEAN: ____*signed by Unit Head!*_____ DATE: _____

VICE CHANCELLOR: _____ DATE: _____

CHANCELLOR: _____ DATE: _____

INITIALS: _____ DATE: _____ INITIALS: _____ DATE: _____

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**.