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EPFO, HEAD OFFICE

MINISTRY OF LABOUR & EMPLOYMENT, GOVERNMENT OF INDIA
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No. HRM-IX/APAR/2022-2023/Mapping /214

Dated: 04-01-2024

To

All Addl. CPFCs (Zones) including ACC (HQ)
The Director (PDNASS)
All RPFCs/OIC in-charge of ROs/ASD-HO/ZTIs/DOs

Subject:- Electronic submission of Annual Performance Assessment Report (APAR) for the year 2022-2023 through HR-Soft application software – Regarding.

Madam/Sir,

The Annual Performance Assessment Report (APAR) for the year 2022-23 is to be submitted by all Group 'A', 'B' and 'C' cadre through HR-Soft application software of EPFO. It is mandatory for all officers/officials in Group 'A', 'B' and 'C' cadre to submit their self-appraisal to report, review and monitor the APAR of their subordinates through electronic mode only.

2. However, before the filling of APAR, the role of APAR custodian needs to be given at the level of each office. Hence, each office should assign the "APAR Custodian" role to the designated officer who may be at the level of OIC/RPFC(Adm.)/immediate subordinate officer. Further, this role may be assigned through HR Admin user (****120user) of the office.

3. This functionality will be available from 05.01.2024 onwards. The APAR Custodian of each office must complete the task of mapping the Reporting and Reviewing officer latest by 12.01.2024 as per the procedure outlined in the attached user Manual.

(This issues with the approval of Competent Authority)

Yours faithfully,

(Mohammad Shariq)

Regional P.F. Commissioner-I (HRM)



USER MANUAL ON APAR CUSTODIAN

Guidelines for using APAR

The APAR Custodians have used the function for the year 2020-21 for the Group A and some B officers and must have seen the process to be followed

Based on the last years' experience the important issues are listed below and following them will make the task easy for the APAR Custodian, employees whose APAR is to be written and the Reporting and Reviewing Officers.

1. The APAR Custodian should download the list of employees posted in the office as explained and keep the names of Reporting and Officers ready so that the same is updated in the software.
2. Once the data is updated it will appear in the login of the respective employees.
3. It will be a better idea to ask all the employees to login and check the names of their reporting and reviewing officers and report error to the APAR Custodian so that the correct reporting and reviewing officers are linked.
4. The system allows to file multiple APAR of a person for the same year if there are different reporting and or reviewing officers for the year due to change in the work area or change of the controlling officer during the year.
5. Once the timeline for APAR Custodian is over then only the self-appraisal part for the employees will open. Once this is opened, change in reporting or reviewing officer's name will not be possible.
6. It is therefore very important that the details of correct reporting and reviewing officer is entered by the APAR Custodian and the individual employees should log in to the HR Software and check if the correct details have been entered.

For APAR Custodian

- As stated above, he should download the list and update the details at the earliest.
- It is believed that all offices are having whatsapp groups created for their office employees and message may be given that the names of Reporting and Reviewing Officers have been updated so that all employees check the names and report error if any.
- Editing is possible till the time line is not crossed for APAR Custodian.

- The time lines will be announced by the APAR Wing, HR Division.

For Individual Employee:

- Once the APAR Custodian has updated the name of Reporting and Reviewing Officer, the individual employee should check the names in their login and if there is any error should report to the APAR Custodian so that the correction is done in time.
- The self-appraisal part will open only when the time line for APAR Custodian is over.
- Each employee should check if the Part I of the APAR form is correctly filled in.
- In case of any error, they should approach the local Admin User for getting the data of their personal details corrected. This is not within the role of APAR Custodian.
- If they agree (Submit Agree Button) with the available data, then the data will be frozen for the current year APAR and no edit will be possible. Even if the data is corrected in the software it will not be updated in the Part I.
- The submission of the self-appraisal part II is based on OTP authentication on the mobile linked with the EID in the HR Software. Once the data is submitted, no further editing will be possible.
- Each employee should check whether his EID has a valid mobile number linked and if not should get the same updated through the local admin user.

Important:

- Once the self-appraisal part is opened for filing, change in Reporting and / or Reviewing Officers name will not be possible by the APAR Custodian, so please help him by reporting error in name, if any, for correct linking.
- Once the self-appraisal Part II is submitted through OTP validation no further editing will be possible.
- Just saving and submitting without OTP validation will not display the self-appraisal part to the Reporting Officer after expiry of the time period for filling the self-appraisal part.
- If not submitted properly (through OTP Validation) the Reporting Officer will see the self-appraisal part as a blank form and will give his report without the self-appraisal.

For Local Admin User:

- The APAR formats are different for different designations. So please check that the designations are correctly updated in the system.
- The corrections requested by the individual employee in respect of the personal details in the APAR for the year may be dealt on a priority and only based on the authentic document of service book.
- Delay may make an employee not able to file his self-appraisal part in time if he is not satisfied about the correctness of the personal details in Part I.

For the Reporting Officers:

- Once the APAR custodian has updated the details, the Reporting Officer will be able to view the list of such employees for whom he is made the Reporting Officer.
- In case of any error like the particular employee having not worked under him, he should report to the APAR Custodian for making the necessary correction.
- In case the officer finds that some employees worked under him but their names are not appearing for writing their APAR, then also he should intimate the fact to the APAR Custodian.
- Once the time for self-appraisal is over the task of Reporting will open in the login of the Officer.
- In case the employee had not filled his self-appraisal, then the Part II will appear blank and the Reporting Officer can write his report.
- In case the Reporting Officer does not write the report in time given by the HR Division, the option to report will lapse and the APAR will appear for reviewing by the Reviewing Officer. For the reporting Officer the system will attach a certificate once the APAR is to be disclosed.
- The Reporting Officer will be able to view the status of filing of self-appraisal by the employees and can remind them to complete the task.

For the Reviewing Officers

- The role is similar to that of a Reporting Officer.
- Once the APAR custodian has updated the details the Reviewing Officer will be able to view the list of such employees for whom he is made the Reviewing Officer.

- In case of any error like the particular employee having not worked under him, he should report to the APAR Custodian for making the necessary correction.
- In case the officer finds that some employees worked under him but their names are not appearing in his login for writing their APAR, then also he should intimate the fact to the APAR Custodian.
- Once the time for Reporting Officer is over the Part IV for Reviewing will open in the login of the Officer.
- In case the employee has not filled his self-appraisal, then the Part II will appear blank and if the Reporting Officer also has not entered his report, then the Part III will also appear blank and the Reviewing Officer can write his report.
- In case the Reviewing Officer does not write the report in time given by the HR Division, the option to review will lapse. The system will attach a certificate once the APAR is to be disclosed.
- The Reviewing Officer will be able to view the status of filing of self-appraisal and Reporting by the employees/ Reporting Officer and can remind them to complete the task.

Important for error reporting to ISD

The following cases will not be considered by the ISD as a technical error even when reported under issue tracker

- **Change in name of reporting officer or reviewing officer:** This task lies with the APAR Custodian and he can do this only till the self-appraisal function has not started.
No change will be possible after the date and such requests will not be handled by ISD.
- **Request for allowing the personal details after the individual employee has agreed with the details displayed.** Before the submission the Admin user can make corrections.
- **Request for filing/ editing of self-appraisal or report or review**
Once a self-appraisal/ report/ review has been completed and submitted through OTP authentication no edit is possible.
- **Request for allowing filing of self-appraisal/ report/ review after the completion of time lines**

The system will stop the respective functions at 12 midnight of the last date.

Please complete your task much before this time and do not wait for the last date and last hour to complete it.

The time will be based on the time in the servers and your device may have different time.

A humble request to the OICs of the offices that may be forwarding cases under Issus Tracker

The issues can be avoided through timely filing of the details.

While the ISD will definitely check if any technical issues are reported, it will not respond to the cases which are reported due to not filing within time.

It is requested again that:

Please Get the present designation of the employees corrected as the format opens as per the designations.

Please guide the employees to do their task in time. This can be done through the Reviewing Officers who may remind the employee and the reporting officers by seeing the status in their login.

Please do not forward any issue under the 4 cases mentioned above as it will not be possible to entertain/ reply such requests.

Objective:- The objective of the functionality is to be provide a facility to the APAR Custodian to map the Reporting and Reviewing Officer of the office.

Pre-Condition:- Each office should assign the “APAR Custodian” Role to the designated officer. After logging in select APAR Role, If not assigned, kindly get the same assigned through the HR Admin user (****120 user) of your office.

The functionality will be available as per the dates decided by the APAR wing, hence the APAR Custodian of each office should abide to the time period and must complete the task of mapping the Reporting and Reviewing Officer within the given time period. Any request after the allowed time period will not be entertained. In case any issue is observed, the same may be reported to the HR Software Technical Team, NDC through “Issue Tracker Portal” ONLY.

Flow:- Click APAR Mapping functionality from the menu and following screen will be displayed:-

Click Show List button. A list of all current employees will be displayed and the same can also be downloaded in the MS excel Format by clicking “Export To Excel” button.

APAR custodian may download the report in excel format and a print out can also be taken so that it can work as “Input Data Sheet” for writing the name of Reporting and Reviewing Officer offline for officer of the office who is eligible for filling APAR through HR Software and later on the basis of this Input Data Sheet the data can be entered in the functionality thereby saving the time and energy.

2020-2021 [Show list](#) [Export To excel](#)

Sno	EID	Name	Designation	Reporting officer Eid	Reviewing officer Eid	Period From	Period To	Action
1	AA020755124070181	ANITA BHATURA	SECTION OFFICER			01/04/2020	31/03/2021	Add
1	AA080560124250385	ALKA JHA	SECTION OFFICER			01/04/2020	31/03/2021	Add
1	AA100362124120983	AMAR	STAFF CAR DRIVER (ORDINARY GRADE)			01/04/2020	31/03/2021	Add
1	AA151057124281180	ARUNA ARORA	SECTION OFFICER			01/04/2020	31/03/2021	Add
1	AA260153124301285	AJIT KULSHRESHTRA	ACC-II			01/04/2020	31/03/2021	Add
1	AB090163124120687	ANJU GUPTA	SECTION OFFICER			01/04/2020	31/03/2021	Add
1	AB090885047300714	AYUSH GAUTAM	APFC			01/04/2020	31/03/2021	Add

In case any staff or officer has multiple/part APARs in the year, then there is a facility to add the parts by clicking ADD button at the end of each record. Each record may have different reporting and reviewing officer.

For this click ADD button, a new row will be added in the list. In case any wrongly entered row can be deleted by using the DELETE button.

2020-2021 [Show list](#) [Export To excel](#)

Sno	EID	Name	Designation	Reporting officer Eid	Reviewing officer Eid	Period From	Period To	Action
1	AA020755124070181	ANITA BHATURA	SECTION OFFICER			01/04/2020	31/03/2021	Add
2	AA020755124070181	ANITA BHATURA	SECTION OFFICER					Delete
1	AA080560124250385	ALKA JHA	SECTION OFFICER			01/04/2020	31/03/2021	Add
1	AA100362124120983	AMAR	STAFF CAR DRIVER (ORDINARY GRADE)			01/04/2020	31/03/2021	Add
1	AA151057124281180	ARUNA ARORA	SECTION OFFICER			01/04/2020	31/03/2021	Add

For mapping of Reporting and Reviewing Officer, click on EID Hyperlink. A pop up will open and the reporting and reviewing officer name can be mapped by entering the first few characters of name/EID and click ADD button. The details will be populated below the search bar. Same process for mapping Reviewing Officer. Cases where part APAR are to be filled for any employee then Period From and Period To will be enabled so that the necessary dates can be entered by the APAR Custodian.

Reporting & Reviewing for AA020755124070181

EID Details

EID: AA020755124070181 Name: ANITA BHATURA Designation: SECTION OFFICER
 Posted Date From: New Appointment: Posting Period:
 Period From: 01/04/2020 Period To: 31/03/2021

Reporting Officer Details

Reporting Officer EID/Name:
 Name: Designation: DOR:

Reviewing Officer Details

Reviewing Officer EID/Name:
 Name: Designation: DOR:

Click SAVE button to save the details.

Now click on show list. Now you can see the mapped reporting officer and reviewing officer for a particular EID.

प्रसूची पृष्ठ पर जाएँ/

Sno	EID	Name	Designation	Reporting officer Eid	Reviewing officer Eid	Period From	Period To	Action
1	AA020755124070181	ANITA BHATURA	SECTION OFFICER	DK180176124140704	DK180176124140704	01/04/2020	31/03/2021	<input type="button" value="Add"/>

Kindly note that in case any wrong officer is mapped or wrong date (Period From/Period To) is entered, the same can be edited any **number of times till the last date of mapping by the APAR Custodian**. After the last date is over, the window will be closed and the functionality will be displayed, but ADD button and EID hyperlink will not be available.

After the successful mapping of reporting and reviewing officer, in the employee login following screen will be displayed in the “SELF APAR” functionality:-

SELF APAR						
Sno	EID	Reporting Officer	Reviewing officer	Period From	Period To	Self Apar
1	IJ130271113021194, INDU TOMAR, SECTION OFFICER	NILENDU MISHRA,RPFC-I	JAG MOHAN,ACC (HQ)	01/04/2020	31/03/2021	<input type="button" value="Fill"/>

In case of any change in the dates (Period from/period to) or changing of mapped reporting and reviewing officer, the employee/officer can approach the APAR Custodian for the needful till the window is not closed.

MOST IMPORTANT NOTES

1) Once the timeline (as decided and circulated by the APAR wing) of mapping of Reporting/Reviewing Officer by APAR custodian is expired, it will not be possible to map or re-map the reporting/reviewing officer. The task has to be completed as per the timeline decided by the APAR Wing, Head office. Kindly note that for APAR mapping or changing request of Reporting/Reviewing Officer **MUST NOT be sent NDC** under any circumstances.

2) In case, the name of some officials are displayed who are not eligible for filling the APAR, APAR mapping should not be done for all such cases. It is the duty of the each individual to verify in “Self APAR” functionality that his/her reporting and reviewing officers are correctly mapped. In case of any updation, the individual should coordinate with the APAR custodian immediately as the APAR

custodian will not be able to change after the expiry of timeline for APAR Custodian. **After the expiry of timeline, no request should be sent to NDC as regards to such cases.**

3) All Officers should check in their login for which employees they are mapped as reporting/reviewing officer before the timeline of APAR Custodian is expired. **After the expiry of timeline, no request should be sent to NDC as regards to such cases.**

4) The employee details are displayed as per the data updated by the concerned FO and data updation request should not be sent to NDC.

5) No requests for extension of timeline should be sent to NDC as the same falls under the jurisdiction of the APAR Wing, Head Office. However, the offices may report the technical issues immediately to the HR Software Technical Team, NDC at “Issue Tracker Portal” ONLY. However, the resolution for issues reported after the expiry of timeline or before 2-3 days prior to expiry of timeline may get delayed. Therefore, it is requested to try to complete the task well before time in order to avoid any inconvenience.
