



सत्यमेव जयते

**GOVERNMENT OF INDIA
DIRECTORATE OF INCOME TAX
HUMAN RESOURCE DEVELOPMENT
CENTRAL BOARD OF DIRECT TAXES**

2nd Floor, Jawaharlal Nehru Stadium, Gate No. 1, New Delhi - 110003

F.No HRD/PMD/13/444/6/T&P/2018-19/1144

Date: 28/05/2018

To,

All Principal Chief Commissioners of Income Tax (Cadre Controlling Authorities)/
All Principal Director Generals of Income Tax (of Attached Directorates of CBDT)/
and Principal Director General of Income Tax (Training), NADT, Nagpur.

Sub: Implementation of Transfer and Posting Module of HRMS. - reg.

Madam / Sir,

Kindly refer to the above cited subject.

2. The Transfer and Posting Management module of Human Resource Management System (HRMS) as part of ITBA (Income Tax business Application) is already available on the ITD intranet since last year.
3. The user manual and FAQ of the module is enclosed herewith for ready reference. The user manual on Handover/Takeover through HRMS is also enclosed herewith.
4. In this context, I have been directed to request you to kindly instruct the CIT (Admn. TPS) to upload all the Transfer and Posting orders of all Group A & B officers from July, 2018 onwards on Transfer and Posting Management module of HRMS and to mark a copy of the orders to ADG-3, HRD. I am also directed to request you to kindly instruct all the Group A & B officers under your charge to complete the process of Charge Handover/Takeover only through the Transfer & Posting Management Module of HRMS duly verified by the concerned DDOs. The problem faced may also be logged in to HRMS portal (may be emailed to support.hrms@incometax.gov.in.)
5. This issues with the approval of Pr. DGIT, (HRD).

Encls : As above.

Yours faithfully,

Shashi

**(Shashi Kajle),
JDIT (PMD & HRMS) (HRD).**

Copy to :-

1. Web Manager, for www.irsofficersonline.gov.in to upload it on the website.

JDIT(PMD & HRMS) (HRD).

Shashi Kajle
28/05/18

P.S.: It may kindly be noted that the enclose to this letter being very elaborate document is being separately emailed to the respective CCA charges for necessary action at their end.



Income Tax Department

Department of Revenue, Ministry of Finance, Government of India



INCOME TAX BUSINESS APPLICATION

HRMS Handover/Takeover User Manual

February 2016, Version 1.0

1.1 Getting Started

This section provides information for accessing the application, email services and help desk details.

- **Browser Requirements**

Recommended - IE 9 onwards, Google Chrome 38.0 onwards and Mozilla Firefox 36.0 onwards

- **Accessing ITBA Portal:** <http://itba.incometax.gov.in> (Production URL)

03 February 2016 18:11 PM A- A A+ Sitemap Settings

ITBA
INCOME TAX BUSINESS APPLICATION

Home | Help | FAQs | Utilities

Login Here

Username *
 Password *
 RSA *

Login

[Change RSA PIN](#) [Forgot Password](#)

IMPORTANT LINKS

[CPC AO Portal](#)
[Sevottam](#)
[i-Taxnet](#)

Online Training on ITBA

Have Questions?? **Call Now** 0120-2772828

Download Prerequisites

Messages **Statistics Of The Day**

Message from Member (L&C)

Ms. Rani Singh Nair
(Member (L&C))

Dear Colleagues,
 The existing ITD software application has been the backbone of computerization of the Department for last 20 years. Since then, the Department has witnessed many significant changes including its vertical as well as horizontal growth in various functionalities. With the widening and deepening of the Tax base, there was an urgent need to revamp the existing ITD software applications....

[See More...](#)

■ **Shri Arun Kumar Jain, IRS(78005) has been appointed as Chairman, Central Board of Direct Taxes.** ■

Departmental News **Instructions** **Miscellaneous**

Pr.CCIT(CCA) wise appeal statistics as on 27.11.2015 - Based on the data uploaded in Appeal Module of ITBA.
 27/Nov/2015

Government asks top Income Tax officers to ideate for widening tax base
 21/Jun/2015

Will not use coercive methods to recover MAT from Fills: CBDT chairperson Anita Kapur
 21/Jun/2015

Banks in tax havens like Switzerland and Mauritius to run checks on Indians looking to open black money account
 21/Jun/2015

Income tax forms simplified, date for filing returns extended to Aug 31
 21/Jun/2015

Calendar

February 2016


Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

[Show Current Date](#)

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- **Accessing Email Messaging Service:** <http://webmail.incometax.gov.in> (Production URL)

E-mail Solution

 **TBA**
INCOME TAX BUSINESS APPLICATION

Username:

Password:

Sign In

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Webmail Documents

- [Webmail FAQ's](#)
- [Instructions for subscribing two emailIDs on single interface](#)
- [Webmail Configuration in Outlook over Taxnet](#)
- [Webmail Configuration in Outlook and Mobile over Internet](#)
- [Browser instructions for ITBA portal](#)

Helpdesk

- **Contact No :** 0120- 2772828 , 0120- 2772842
- **Email ID :** helpdesk_messaging@incometax.gov.in

Contact us:

URL of helpdesk - <http://itbahelpdesk.incometax.net>

Help desk number – 0120-2772828

Email ID – helpdesk_messaging@incometax.gov.in

Help desk Timings – 8.30 A.M. – 7.30 P.M. (Monday to Friday)

1.2 Table of Contents

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1.3 Introduction

Human Resource Management System (HRMS) module covers processes which helps in better and effective management of personal & administrative functions related to the ITD officials. HRMS Handover Takeover management module is covered in the following sections. Handover Takeover module will involve submission and approval extension requests along with handover of charge. The process of joining is also covered as part of the manual.

1.4 Environment

Below mentioned links can be used for accessing the HRMS application:-

Intranet Link:- http://incometax.gov.in/ItbaPortal/faces/pages_home

1.5 HRMS Module User Roles

Following are the users of HRMS module:

- Employee
- Admin

1.6 List of Abbreviations

The list of abbreviations is as follows:

Table 1:- List of Abbreviations

S. No	Abbreviations	Description
1.	CCIT	Chief Commissioner of Income Tax
2.	CIT	Commissioner of Income Tax
3.	ITO	Income Tax Officer
4.	HRMS	Human Resource Management System
5.	ITBA	Income Tax Business Application
6.	ITD	Income Tax Department

2. Introduction to Handover Takeover Management

Handover Takeover Management module allows the employees/admin to raise extension requests, get extension approved and joining using the HRMS application.

This section explains the following processes of handover takeover management

1. Officer Extension by employee
2. Extension request by without approval
3. Handover Note sheet by employee
4. Officer extension request submission by admin
5. Local arrangement
6. Report Generation
7. Change Channel of Submission to dynamically update Sanctioning Authority
8. Raise Query Functionality
9. Viewing request history
10. Joining Report Submission
11. Joining Report Approval
12. Handover Takeover Request Cancellation

2.1 Extension request Channel of submission (COS) Setup

Navigation

Main Menu → Workforce Administration → Handover Takeover Management → COS Setup

In the COS Setup screen, user can check the approval levels.

Figure 1: Extension Request-Search Page

Fields:

CCA region: Lookup to select the CCA Regions.

Levels of Approval: Level of approval followed for the specific requestor rank.

Office: Display all Offices.

Channel 1: Submission in Hierarchy

*Post Number	Post Name	Incumbent Name	Final Approver	Auto forward	Auto forward time
1			<input type="checkbox"/>	<input type="text"/>	

Figure 1: Extension Request - Channel 1 – Submission in Hierarchy

Channel 2: Forwarding to CCA

Channel of Submission(COS) Setup

Module: Extension Request CCA Region CCA PUNE Location ALL Office ALL

Setup Find | View All | < 2 of 4 > Last

Channel Type Forwarding to CCA

COS Setup Find | < 1 of 1 > Last

	*Post Number	Post Name	Incumbent Name	Final Approver	Auto forward	Auto forward time
1				<input type="checkbox"/>	<input type="text"/>	

Figure 3: Extension Request - Channel 2 – Forwarding to CCA

Channel 3: Inward Receipt (CCA)

Channel of Submission(COS) Setup

Module: Extension Request CCA Region CCA PUNE Location ALL Office ALL

Setup Find | View All | < 3 of 4 > Last

Channel Type Inward Receipt(CCA)

COS Setup Find | < 1 of 1 > Last

	*Post Number	Post Name	Incumbent Name	Final Approver	Auto forward	Auto forward time
1				<input type="checkbox"/>	<input type="text"/>	

Note: This channel will be the reverse of Forwarding channel

Figure 4: Extension Request - Channel 3 – Inward Receipt CCA

Channel 4: Forwarding Channel

Channel of Submission(COS) Setup

Module: Extension Request CCA Region CCA PUNE Location ALL Office ALL

Setup Find | View All | < 4 of 4 > Last

Channel Type Forwarding Channel

COS Setup Find | < 1-2 of 2 > Last

	*Post Number	Post Name	Incumbent Name	Final Approver	Auto forward	Auto forward time		
1	49000195	ITQ(HQ)(TECH) CCIT PUNE	SINGH JAGBIR	<input type="checkbox"/>	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
2	20300135	ADDL/JCIT(HQ)(ADMN) CCIT PUNE	SUNITA BILLA	<input type="checkbox"/>	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

Figure 5: Extension Request - Channel 4 – Forwarding Channel

2.2 Officer Extension Request by Employee

Navigation

Main Menu → Employee Self service → Handover Takeover Management → Extension Request

Below screen will be displayed to user when above mentioned navigation link.



Extension Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request History | Create New Request

▼ Search Criteria

Request ID: begins with []

Request Date: = []

Search Clear Basic Search Save Search Criteria

Figure 6: Officer Extension Request Search page

The Employee can select the Request by searching the request history.

If the employee has to create a New Request, click on Create New Request. Click on the Create New Request and click on Add button, the following screen will appear:

Officer Extension Request

Request Details

Request ID NEW Request Date 24.02.2016

Employee Details

*Employee ID 133219 *Type of Order Transfer Order

*Order No. Order Date

*Extension Date Mandatory Relieving Date(As in Order)

Order Released by

Attachment Find | View All | First 1 of 1 Last

Attachment	Date/Time	Comments
1 Add Attachment		

Comments

Comments

Save Submit

Figure 7: Officer Extension Request page

Select corresponding Order No.

Once the Order No. will be selected, Order Date, Mandatory Relieving Date will get automatically populated.

Enter the Extension Date.

Enter the Comments.

Add File for attachment.

Click on **save** button to save the request as Draft.

Officer Extension Request

Request Details

Request ID: EXTEMP0050 Request Date: 24.02.2016

Employee Details

*Employee ID: 133219 *Type of Order: Transfer Order
 *Order No: 112 OF 2016 Order Date: 24.02.2016
 *Extension Date: 25.02.2016 Mandatory Relieving Date(As in Order): 24.02.2016
 Order Released by: CBDT0001 CHAIRMAN CBDT

Attachment

Find | View All | First 1 of 1 Last

Attachment	Date/Time	Comments
1 Add Attachment		

Comments

Comments: Please Approve.

Save Submit

Figure 8: Officer Extension Request page (On Save Click)

Click on **Submit** button to submit the request for Approval.

Officer Extension Request

Request Details

Request ID: EXTEMP0050 Request Date: 24.02.2016

Employee Details

*Employee ID: 133219 *Type of Order: Transfer Order
 *Order No: 112 OF 2016 Order Date: 24.02.2016
 *Extension Date: 25.02.2016 Mandatory Relieving Date(As in Order): 24.02.2016
 Order Released by: CBDT0001 CHAIRMAN CBDT

Status

Pending With: CHAIRMAN CBDT

Figure 9: Officer Extension Request page (On Submit Click)

The Approval will follow the COS Approval as shown above. In this approval only the last Approver will be able to Approve/ Deny the transaction.

Approver can access the link officer mapping request as a worklist item. Click on the link corresponding to a specific request to access request details

Worklist

Worklist for U700094: AKSHAY AGGARWAL

[Detail View](#)

Worklist Items			Personalize	Find	View All	First	1-4 of 4	Last
From	Date From	Link						
PIJUSH MUKHERJEE	24.02.2016	Extension Request						

Figure 10: Approver's Worklist

Approver has the provision to :

- Enter comments
- Track the file movement history by clicking "file movement history" link
- Approve the request
- Deny the request
- Raise Query: Request will be sent back to the previous officer in workflow along with approver comments

Officer Extension Request

Request Details

Request ID	EXTEMP0050	Request Date	24.02.2016
------------	------------	--------------	------------

Employee Details

*Employee ID	133219	*Type of Order	Transfer Order
*Order No	112 OF 2016	Order Date	24.02.2016
*Extension Date	25.02.2016	Mandatory Relieving Date(As in Order)	24.02.2016
Order Released by	CBDT0001 CHAIRMAN CBDT		

File Movement History

[File Movement History](#)

Comments

Comments

Figure 11: Approver's page

Officer Extension Request	
Request Details	
Request ID EXTEMP0050	Request Date 24.02.2016
Employee Details	
*Employee ID 133219	*Type of Order Transfer Order
*Order No 112 OF 2016	Order Date 24.02.2016
*Extension Date 25.02.2016	Mandatory Relieving Date(As in Order) 24.02.2016
Order Released by CBDT0001 CHAIRMAN CBDT	
File Movement History	
File Movement History	

Figure 12: Approver's page (On Approve Click)

Once the approver approves the request, the officer extension request workflow is complete.

2.3 Officer Extension Request by Admin

Navigation

Main Menu → Workforce Administration → Handover Takeover Management → Officer Extension Request

Below screen will be displayed to user when above mentioned navigation click

Figure 13: Officer Extension Request by Admin Search Page

The Admin can search the Request by searching the Request History.

If the Admin has to create a New Request for any Employee, click on Create New Request. Click on the Create New Request and click on Add button, the following screen will appear:

Figure 14: Officer Extension Request Page

Admin has to select the Employee ID, Type of Order and then select corresponding Order No.

Once the Order No. will be selected Order Date & Mandatory Relieving Date will get automatically populated.

Enter the Extension Date.

Enter the Comments (if applicable).

Click on **save** button to save the request as Draft.

Officer Extension Request

Request Details

Request ID	EXTEMP0051	Request Date	24.02.2016
------------	------------	--------------	------------

Employee Details

*Employee ID	128309	*Type of Order	Transfer Order
*Order No	113 OF 2016	Order Date	24.02.2016
*Extension Date	25.02.2016	Mandatory Relieving Date(As in Order)	24.02.2016
Order Released by	CBDT0001 CHAIRMAN CBDT		

Attachment

Find | View All | 1 of 1 | Last

Attachment	Date/Time	Comments
1 Add Attachment		

Status

Pending With JOINT COMMISSIONER OF IT (SAL) R- I CHN

Figure 15: Officer Extension Request page

Click on **Submit** button to submit the transaction for Approval. The Approval will follow the COS Approval as shown above.

The approver can view the request generated by the employee in the worklist as shown below:

Worklist

Worklist for U221289: DHARM SINGH

[Detail View](#)

Worklist Items

Personalize | Find | View All | 1 of 1 | First | Last

From	Date From	Link
DHARM SINGH	24.02.2016	Extension Request

Figure 16: Approver Worklist

Approver has the provision to :

- Enter comments
- Track the file movement history by clicking “file movement history” link

- Approve the request
- Deny the request
- Raise Query: Request will be sent back to the previous officer in workflow along with approver comments

Officer Extension Request	
Request Details	
Request ID EXTEMP0051	Request Date 24.02.2016
Employee Details	
*Employee ID 128309	*Type of Order Transfer Order
*Order No 113 OF 2016	Order Date 24.02.2016
*Extension Date 25.02.2016	Mandatory Relieving Date(As in Order) 24.02.2016
Order Released by CBDT0001 CHAIRMAN CBDT	
File Movement History	
File Movement History	
Comments	
<div>Comments</div> <div></div>	
<div>Approve</div> <div>Deny</div>	

Figure 17: Approver Page

Officer Extension Request	
Request Details	
Request ID EXTEMP0051	Request Date 24.02.2016
Employee Details	
*Employee ID 128309	*Type of Order Transfer Order
*Order No 113 OF 2016	Order Date 24.02.2016
*Extension Date 25.02.2016	Mandatory Relieving Date(As in Order) 24.02.2016
Order Released by CBDT0001 CHAIRMAN CBDT	
File Movement History	
File Movement History	

Figure 18: Approver Page (On Approve Click)

In this approval only last Approver will be able to Approve/ deny the transaction.

Once the approver approves the request, the link officer mapping workflow is complete.

2.4 Extension without Approval

The page will be used by the Admin to Initiate the Extension Request on behalf of Employees.

Navigation

Main Menu → Workforce Administration → Handover Takeover Management → Extension without approval

Figure 19: Extension without Approval Search page

The Extension without Approval process is same as Officer Extension Request; the only difference is that in this case the Approve/ Deny button will be available to all the Approvers.

Figure 20: Extension without Approval

In this at any level request can be approved.

On click of save Request Id is generated.

Extension without Approval of the competent authority	
Request Details	
Request ID EXTWOA0052	Request Date 25.02.2016
Employee Details	
*Employee ID 136980	*Type of Order Transfer Order
*Order No 116 OF 2016	Order Date 25.02.2016
*Extension Date 26.02.2016	Mandatory Relieving Date(As in Order) 25.02.2016
Order Released By CBDT0001	
Comments	
Comments	
Save	Submit Approve

Figure 21: Extension without Approval (On Save Click)

In this at any level request can be approved.

Extension without Approval of the competent authority	
Request Details	
Request ID EXTWOA0052	Request Date 25.02.2016
Employee Details	
*Employee ID 136980	*Type of Order Transfer Order
*Order No 116 OF 2016	Order Date 25.02.2016
*Extension Date 26.02.2016	Mandatory Relieving Date(As in Order) 25.02.2016
Order Released By CBDT0001	
Status	
Approved by JOINT COMMISSIONER OF IT 31, DELHI	

Figure 22: Extension without Approval (On Submit Click)

Once the approver approves the request, the link officer mapping workflow is complete.

2.5 Consolidated extension Request

This page will be used by the Approvers of Extension request. This page will be useful when there are lot of Officers Extension Request pending with the Approver. This is an Additional functionality implemented in HRMS.

Navigation

Main Menu → Workforce Administration → Handover Takeover Management → Consolidated extension Request

Below screen will be displayed to user when above mentioned navigation click.



The screenshot shows a web interface titled "Consolidated Extension Request". Below the title is a text prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a section titled "Search Criteria" with a dropdown arrow. Under "Search Criteria", there is a label "Request ID:" followed by a dropdown menu showing "begins with" and an adjacent text input field. At the bottom, there are four buttons: "Search", "Clear", "Basic Search", and "Save Search Criteria" (which includes a small icon).

Figure 23: Consolidated Extension Request search page

The Approver can search the Old Request by searching the request history.

If the Approver has to create a New Request, click on Create New Request. Click on the Create New Request and click on Add button, the following screen will appear:

If there will no request pending with the Approver, then the below message will be displayed:



Figure 24: Consolidated Extension Request – No pending Request Message

If any Request will be pending with the Approver, the below grid will be displayed and it will display All the request in Consolidated form.

Officer Extension Request

RequestID: [New](#)

Consolidated Request History

RequestID(worked on)	Request Date	Order Type	Order No	Order Released By	Post Description	Order Date	Employee ID	Extended Date	Mandatory Relieving Date	*Comments
1 EXTMP0049	15.02.2016	Transfer Order	102 OF 2016	CBDT0001	CHAIRMAN CBDT	15.02.2016	209927	17.02.2016	16.02.2016	*Comments

Find | | | |

Figure 25: Consolidated Extension Request – Consolidated Request list

The Approver will delete the rows for which he did not want to process the request further and for the remaining request the Approver will click on Submit button.

Click on **save** button to save the request as Draft.

Click on **Submit** button to approve the transaction and send it to the next Approver.

2.6 Handover Notesheet by employee

The authorized approver can access the leave request as a work item in their worklist

Navigation:

Main Menu → Employee Self service → Handover Takeover Management → Handover Notesheet

Below screen will be displayed to user when above mentioned navigation click

Handover Notesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request History | Create New Request

▼ **Search Criteria**

Request ID: begins with []

Request Date: = []

Search Clear Basic Search Save Search Criteria

Figure 26: Handover Notesheet – Employee – Search Page

The Employee can search the Old Request by searching the request history.

If the Employee has to create a New Request, click on Create New Request. Click on the Create New Request and click on Add button, the following screen will appear:

Handover Notesheet

Request Details

Request ID: NEW Request Date: 14.06.2015

Employee Details

Employee ID: 104406 Name: NATHU RAM

*Type of Order: Transfer Order *Order No: 248 OF 2015

Comment: submitting documents

Attachment

Personalize | Find | First 1-2 of 2 Last

Attachment	Date	Comments
1 Document1.docx	14.06.15 12:36PM	
2 Document2.docx	14.06.15 12:36PM	

Checklist

☐ Cash stock/Register handed over.

Save Submit

Figure 27: Handover Notesheet – Employee – Request Page

Select the Type of Order and Order No., for which documents handover has to be done.

Enter the Comments

In the Attachment Grid attach the relevant appropriate official documents. Click on (+) button to add more documents.

Click on Check Box if Cash stock / register handed over.

Save Button: The Employee can save this request as draft.

Submit Button: Click on Submit button in case you finally submit the documents. After the Submit button is clicked the Employee will not be able to make any changes in this page.

Note: Intimate this Request No. to the respective Admin.

2.7 Handover Notesheet by admin

This page will be used by the Admin. The Admin will select the new Employee to whom the Handover document has to be send.

Navigation:

Main Menu → Workforce Administration → Handover Takeover Management → Handover Notesheet

Handover Notesheet

Request Details

Request ID NST0000018 Request Date 16.02.2016

Employee Details

Employee ID 209927 Name ADITI GOYAL
 *Type of Order Transfer Order *Order No 102 OF 2016
 Comment

Attachment

Attachment	Date	Comments
1 Instance_Details_new.xlsx	16.02.16 3:27PM	

Checklist

☒ Cash stock/Register handed over.

Submit

Figure 28: Handover Notesheet – Admin

Click on Submit button. The following pop-up page will be displayed



Figure 2: Handover Notesheet – Submit Request

Click on Yes button to submit the Request.

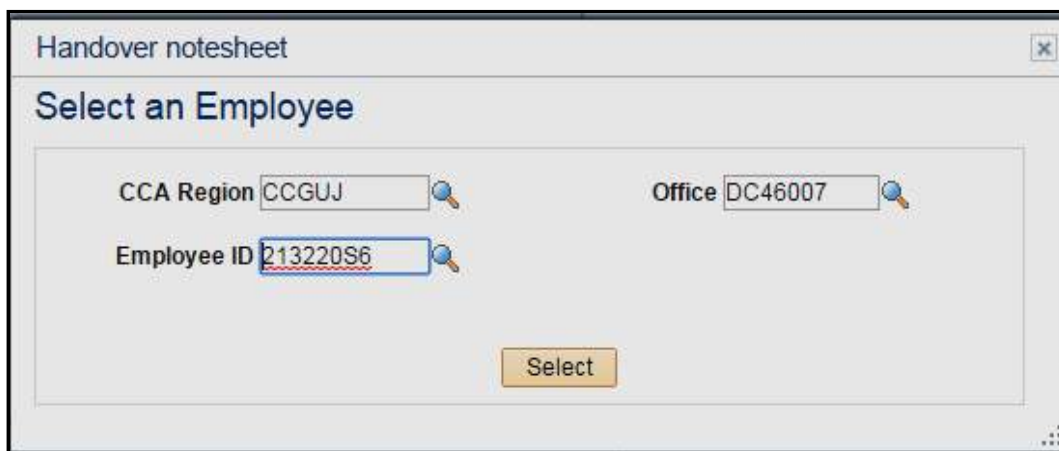
Once the Admin clicks on the Yes button the following pop-up page will be displayed:



The image shows a pop-up window titled "Handover notesheet" with a close button in the top right corner. Inside the window, the heading "Select an Employee" is displayed. Below the heading, there are three input fields: "CCA Region", "Office", and "Employee ID". Each field has a magnifying glass icon to its right, indicating a search function. At the bottom center of the form, there is a yellow button labeled "Select".

Figure 30: Handover Notesheet – Admin – Select Employee Pop-up page

Admin will select the Employee ID to whom the document has to be send. Click on Select button to submit the transaction.



The image shows the same "Handover notesheet" pop-up window, but now the input fields are populated. The "CCA Region" field contains the text "CCGUJ", the "Office" field contains "DC46007", and the "Employee ID" field contains "213220S6". The "Employee ID" field is highlighted with a blue border and a red dashed underline. The yellow "Select" button remains at the bottom center.

Figure 31: Handover Notesheet – Search page

Once the Transaction will be submitted, the new Employee will be receiving link in his Worklist. The New Employee will login to HRMS and Navigate to Worklist to access this Worklist.

Handover Notesheet

Request Details

Request ID NST0000018	Request Date 16.02.2016
------------------------------	--------------------------------

Employee Details

Employee ID 209927	Name ADITI GOYAL
*Type of Order Transfer Order	*Order No 102 OF 2016
Comment	

Attachment

Find | | First 1 of 1 Last

Attachment	Date	Comments
1 Instance_Details_new.xlsx	16.02.16 3:27PM	

Checklist

<input checked="" type="checkbox"/> Cash stock/Register handed over.
--

Request History

Personalize | Find | | First 1-2 of 2 Last

Employee ID	Status	Date From	Comments
1 221745		16.02.16 3:32:40PM	No Comments
2 213220S6		16.02.16 3:32:40PM	

Figure 3: Handover Notesheet Page

2.8 Relieved Officer Details

This page will be accessed by the Admin to relieve the CIT & below level Employees against a particular Transfer Order. The relieving of CCIT & above will not be handled from here. The relieving of CCIT & above will be done automatically when the CCIT & Above will join the new charge.

Navigation:

Main Menu → Workforce Administration → Handover Takeover Management → Relieved Officer Details

Below screen will be displayed to user when above mentioned navigation link

Figure 33: Relieved Officer Details – Search Page

The Admin can search for Old Request through the Search Request.

To create a New Request, click on the Create Request and then click on Add button, then the following page will be displayed:

Figure 34: Relieved Officer Details – Admin - Request Page

Select the Issuing Authority

Select the Order No.

Once the Admin selects the Order No. then the Mandatory Relieving Date and Rank will be populated.

Select the CCA Region

Click on Search Button, the following page will be displayed:

Relieved Officer Details

Request Details

Request ID: NEW Request Date: 24.02.2016

Order Details

*Type of Order: Transfer Order *Issuing Authority: C&D T0001
 *Order No: 114 OF 2016 Order Date: 24.02.2016
 Mandatory Relieving Date(As in Order): 24.02.2016 *CCA Region: CCWEG CCA: WB & SIKKIM
 Rank: ACIT/DCIT Office:
 Search

Details of Officers to be Relieved Find | 1 of 1 | First | Last

Select	Relieved Officer ID	Relieved Officer Name	Office	Office Description	Post ID	Post Description	Type of Charge	To be Relieved when Successor joins	Proposed Relieving Date
1 <input type="checkbox"/>	136980	KAPIL MANDAL	DC49432	DCIT/ACIT(HQ) CIT(TDS) KOL	59000432	DCIT/ACIT(HQ) CIT(TDS) KOL	Main Charge	No	24.02.2016

Save Submit

Figure 35: Relieved Officer Details – Relieve Employee

All the Employees in that particular Transfer Order, will be displayed in that grid 'Details of Officers to be relieved'.

Extension Details Tab:

Details of Officers to be Relieved Find | 1 of 1 | First | Last

Select	Relieved Officer ID	Relieved Officer Name	Extended Relieved Date	Extension Order No.
1 <input checked="" type="checkbox"/>	136980	KAPIL MANDAL		

Figure 36: Relieved Officer Details Page – Extension Details Tab

Extension without Approval Tab:

Details of Officers to be Relieved Find | 1 of 1 | First | Last

Select	Relieved Officer ID	Relieved Officer Name	Name of officer who granted extension without approval	Designation	Extended Relieved Date
1 <input checked="" type="checkbox"/>	136980	KAPIL MANDAL			

Figure 37: Relieved Officer Details – Extension without Approval Tab

In this screen all the extension request details which was raised by employee or by admin on behalf of employee will be displayed here and proposed relieving date will be updated be updated.

The Admin will select the Employee and click on Submit the button to relieved Employee from their Current charge.

Relieved Officer Details

Request Details

Request ID REL0000121
Request Date 24.02.2016

Order Details

*Type of Order Transfer Order
*Order No 114 OF 2016
Mandatory Relieving Date(As in Order) 24.02.2016
Rank ACIT/DCIT

*Issuing Authority CBOT0001
Order Date 24.02.2016
*CCA Region CCWBG
CCA WB & SIKKIM
Office

Details of Officers to be Relieved

Find 1 of 1 First Last

Relieved Officer Details

Extension Details

Extension without Approval

Select	Relieved Officer ID	Relieved Officer Name	Office	Office Description	Post ID	Post Description	Type of Charge	To be Relieved when Successor joins	Proposed Relieving Date
1 <input checked="" type="checkbox"/>	136980	KAPIL MANDAL	DC49432	DCIT/ACIT(HQ) CIT(TDS) KOL	59000432	DCIT/ACIT(HQ) CIT(TDS) KOL	Main Charge	No	24.02.2016

Save
Submit
Draft Order

Figure 38: Relieved Officer Details – on Click of Save

On click of Draft Order Following Draft is screen appear:

Generate Order

Report Subject

Report Body (Before Data)

☐ Auto
☒ Manual

In pursuance of Order No. 114 OF 2016 of 2015-2016 dated 2016-02-24 of Pr. CCIT (B&J), Patna communicated under memo no. TRNORD0396 dated 2016-02-24 Sri/Smt KAPIL MANDAL of this office has been transferred and his service has been placed at the disposal of CCIT, Delhi-1 and in pursuance of subsequent order of Relieving dated 2016-02-24 communicated under memo no. REL0000121 dated 2016-02-24, Sri/Smt KAPIL MANDAL is hereby relieved from his duty today i.e. 2016-02-24 in the forenoon/afternoon to join his/her new place of posting at CCIT, Delhi-1.

Report Body(After Data)

Signature 1

()
Dy. Commissioner of Income Tax (HQ)(Admin)
For: Pr. Chief Commissioner of Income Tax (B&J), Patna

Copy To

Copy for information:

1. The ZAO, CBDT, Patna
2. Accounts Section/Estt. Section, O/o Pr. CCIT, Patna
3. Person Concerned
4. Concerned Office.

Signature 2

()
Dy. Commissioner of Income Tax (HQ)(Admin)
For: Pr. Chief Commissioner of Income Tax (B&J), Patna

Buttons: Save, Preview, Finalize, Generate, Return

Figure 39: Relieved Officer Details – On Click of Draft

On click of Finalize Order is generated:

Relieved Officer Details

Request Details

Request ID: REL0000121 Request Date: 24.02.2016

Order Details

*Type of Order: Transfer Order *Issuing Authority: CBDT0001
*Order No: 114 OF 2016 Order Date: 24.02.2016
Mandatory Relieving Date(As in Order): 24.02.2016 *CCA Region: CCWBG CCA WB & SIKKIM
Rank: ACIT/OCIT Office:

Details of Officers to be Relieved


Relieved Officer Details | Extension Details | Extension without Approval

Select	Relieved Officer ID	Relieved Officer Name	Office	Office Description	Post ID	Post Description	Type of Charge	To be Relieved when Successor joins	Proposed Relieving Date
1 <input checked="" type="checkbox"/>	136980	KAPIL MANDAL	DC49432	DCIT(ACIT)(HQ) CIT(TD3) KOL	59000432	DCIT(ACIT)(HQ) CIT(TD3) KOL	Main Charge	No	24.02.2016

Buttons: View Order


Figure 40: Relieved Officer Details – On finalize Submit

On Click of View Order Report is generated:



GOVERNMENT OF INDIA,
OFFICE OF THE PRINCIPAL CHIEF COMMISSIONER OF INCOME-TAX,
[BIHAR & JHARKHAND REGION]
BIR CHAND PATEL PATH, PATNA
PHONE: 2504447, EPABX-2504020-22, 2504024-25, 2504580-83, FAX: 0612-2504556

F.No: 114 OF 2016 Dated: 2016-02-24



ORDER
Dated, Patna 2016-02-24

F.No: 114 OF 2016

In pursuance of Order No. 114 OF 2016 of 2015-2016 dated 2016-02-24 of Pr. CCIT (B&J), Patna communicated under memo no. TRNORD0396 dated 2016-02-24 Sri/Smt KAPIL MANDAL of this office has been transferred and his service has been placed at the disposal of CCIT, Delhi-1 and in pursuance of subsequent order of Relieving dated 2016-02-24 communicated under memo no. REL0000121 dated 2016-02-24, Sri/Smt KAPIL MANDAL is hereby relieved from his duty today i.e. 2016-02-24 in the forenoon/afternoon to join his/her new place of posting at CCIT, Delhi-1.


()
Dy. Commissioner of Income Tax (HQ)(Admn)

For: Pr. Chief Commissioner of Income Tax (B&J), Patna
Dated: 2016-02-24

Memo No:REL0000121

Copy for information:

1. The ZAO, CBDT, Patna
2. Accounts Section/Estt. Section, O/o Pr. CCIT, Patna
3. Person Concerned
4. Concerned Office.



()
Dy. Commissioner of Income Tax (HQ)(Admn)
For: Pr. Chief Commissioner of Income Tax (B&J), Patna

2.9 Joining Officer

CCIT & Above will perform their joining by themselves. This page will be used by the CCITs & Above for Joining against a Transfer Order.

Navigation:

Main Menu → Employee Self Service → Handover Takeover Management → Joining Officer

Below screen will be displayed to user when above mentioned navigation click

Figure 41: Joining Officer Search Page

The Employee can search for Old Request through the Search Request.

To create a New Request, click on the Create Request and then click on Add button, then the following page will be displayed:

Post ID	Post Description	Type of Charge
1 20120002	CCIT, NASHIK	Main Charge

Figure 42: Joining Officer – Joining Details

The details of the officer will be fetched from the Transfer module.

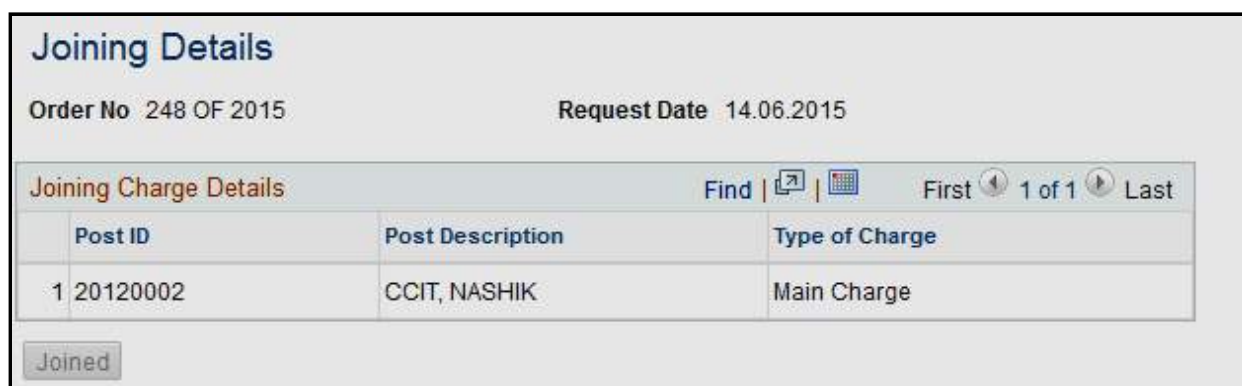
Click on Joined button. The following pop-up page will be displayed



Figure 43: Joining Officer – Proceed message

Click on Yes button to proceed further

Once the Joining has been processed, the Joined button will be greyed out, as shown below

A screenshot of a web application interface titled 'Joining Details'. It shows 'Order No 248 OF 2015' and 'Request Date 14.06.2015'. Below this is a table titled 'Joining Charge Details' with columns 'Post ID', 'Post Description', and 'Type of Charge'. The table contains one row: '1 20120002', 'CCIT, NASHIK', 'Main Charge'. To the right of the table are search and navigation controls. Below the table is a greyed-out button labeled 'Joined'.

Post ID	Post Description	Type of Charge
1 20120002	CCIT, NASHIK	Main Charge

Figure 44: Joining Officer – CCIT Joining

2.10 Joining Page

This page will be used by the Admin for Joining of Employees who are CITs & below CIT level.

Navigation:

Main Menu → Workforce Administration → Handover Takeover Management → Joining Page

Below screen will be displayed to user when above mentioned navigation click

Figure 45: Joining Page – Search Page

The Admin can search for Old Request through the Search Request.

To create a New Request, click on the Create Request and then click on Add button, then the following page will be displayed:

Figure 46: Joining Page – Request page

Admin will select the Type of Order, Issuing Authority and Order No.

Order Date will be populated automatically.

Click on Search button

Figure 47: Joining Page – Join CIT & below level

The entire Employee in the selected Transfer Order will be displayed.

The Admin will select the Employee who physically reports to him and then Admin will click on the Submit button.

If the new charge will be occupied by any other Employee, then the error will pop-up

Figure 48: Joining Page – Generate OSD Post

In this case the Admin will select 'Yes' for the column 'Generate OSD Post'.

Click on Submit button, the Employee will join on the OSD Post. Further once the original post will be relieved, this employee will be moved to the original post and the OSD post will be empty.

Joining Page

Request Details

Request ID	OSD0000036	Request Date	24.02.2016
------------	------------	--------------	------------

Order Details

Type of Order	Transfer Order	*Issuing Authority	CBDT0001
*Order No	114 OF 2016	CCA Region	CCDEL
Order Date	24.02.2016	Office	

Employee List

	Employee ID	Employee Name	Joining Post	Charge type	Generate OSD Post	Affirm Back-Dated Joining	*Joining Date	ForeNoon/AfterNoon
1	<input checked="" type="checkbox"/> 136980	KAPIL MANDAL	CIRCLE 31(1), DELHI	Main Charge	No	<input type="checkbox"/>	24.02.2016	ForeNoon

Figure 49: Joining Page – on Click of Submit

2.11 Local Arrangement

This page will be used by the Admin. Admin will assign the additional charge to the employees based on the request to admin.

Navigation:

Main Menu → Workforce Administration → Handover Takeover Management → Local Arrangement

Below screen will be displayed to user when above mentioned navigation click

Figure 50: Local Arrangement- Search Page

The Admin can search for Old Request through the Search Request.

To create a New Request, click on the Create Request and then click on Add button, then the following page will be displayed:

Figure 51: Local Arrangement Page

Admin has to enter the following details:

Order Number

Order Date

File Number

Issuing Authority

Click on Proceed button. Following screen will be displayed:

Local Arrangement Details

Request Details

Request ID: NEW Request Date: 14.06.2015

Order Details

*Order Number: 248 OF 2015 *Order Date: 14.06.2015

*File Number: F.NO-67/2015 *Issuing Authority: CBDT0001 CHAIRMAN CBDT

Proceed

Charge Details

Personalize | Find | First 1 of 1 Last

Additional Charge to be held	Employee ID	Name	Additional Charge to be held from	*Active Flag
1				Active

Attachment

Personalize | Find | First 1 of 1 Last

Attachment	Date	Comments
1 Add Attachment		

Save Submit

Figure 52: Local Arrangement Assign Additional Charge page

Given Charge Details grid, select the Additional Charge and select the Employee ID to whom this additional charge is to be assigned.

Enter the Additional Charge to be held from Date.

Attach any appropriate document.

Save Button: The Admin can save this request as draft.

Submit Button: Click on Submit button in case admin finally submits the transaction.

2.12 Report

The authorized approver can access the joining report request as a work item in their worklist

Navigation:

Main Menu → Workforce Administration→ Handover Takeover Management→ Report



Employee Can View Relieving/Joining status report.

Issuing Authority– Lookup to Display all Issuing Authority.

Order No– Display all List of order according to the Issuing Authority.

Relieving/Joining Status Report

Request Details

*Issuing Authority:  Order No 



Generate Report

Figure 53: Report Search Page





On selecting Issuing Authority and selecting Particular Order number employee can view Status report.

Relieving/Joining Status Report

Request Details

*Issuing Authority:  Order No 

Generate Report


Employee List Find   First  1 of 1  Last

Employee ID	Relieved or Not	Joined or Not
1 136980	Relieved	Joined

Print

Figure 54: Report Print Page

On click of Print Following Report is generated:


Income Tax Department, India
Relieving/Joining Status Report

Issuing Authority - CBDT0001

114 OF 2016

Employee ID	Order Number	Relieved/Not Relieved	Joined/Not Joined
135980		Relieved	Joined

1

Report Generated By :

Employee ID- 199251

Employee Name - RADHASHYAM MITTAL

Report Run Time - Thursday, February 25, 2016 5:06 AM



Income Tax Department

Department of Revenue, Ministry of Finance, Government of India



INCOME TAX BUSINESS APPLICATION

HRMS Transfer and Posting

User Manual

February 2016, Version 1.0

1.1 Getting Started

This section provides information for accessing the application, email services and help desk details.

- **Browser Requirements**

Recommended - IE 9, Mozilla Firefox 36.0 onwards and Google Chrome 43.0

- **Accessing ITBA Portal:** <http://itba.incometax.gov.in> (Production URL)

The screenshot displays the ITBA portal interface. At the top, it shows the date and time (03 February 2016 18:11 PM) and navigation links (Home, Help, FAQs, Utilities). The main content area includes a login section on the left, a message from a member in the center, and departmental news on the right. A calendar for February 2016 is also visible.

Login Here

Username *
 Password *
 RSA *
 Login

[Change RSA PIN](#) [Forgot Password](#)

IMPORTANT LINKS

[CPC AO Portal](#)
[Sevottam](#)
[i-Taxnet](#)

Online Training on ITBA

Have Questions??
 Call Now 0120-2772828

Download Prerequisites

Messages **Statistics Of The Day**

Message from Member (L&C)

Ms. Rani Singh Nair
 (Member (L&C))

Dear Colleagues,
 The existing ITD software application has been the backbone of computerization of the Department for last 20 years. Since then, the Department has witnessed many significant changes including its vertical as well as horizontal growth in various functionalities. With the widening and deepening of the Tax base, there was an urgent need to revamp the existing ITD software applications....
[See More...](#)

Shri Arun Kumar Jain, IRS(78005) has been appointed as Chairman, Central Board of Direct Taxes.

Departmental News **Instructions** **Miscellaneous**

Pr.CCIT(CCA) wise appeal statistics as on 27.11.2015 - Based on the data uploaded in Appeal Module of ITBA.
 27/Nov/2015

Government asks top Income Tax officers to ideate for widening tax base
 21/Jun/2015

Will not use coercive methods to recover MAT from FIs: CBDT chairperson Anita Kapur
 21/Jun/2015

Banks in tax havens like Switzerland and Mauritius to run checks on Indians looking to open black money account
 21/Jun/2015

Income tax forms simplified, date for filing returns extended to Aug 31
 21/Jun/2015

Calendar

February 2016



Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

[Show Current Date](#)

©2015-2016 Income Tax Department Government Of India Portal Policy Powered By TATA Consultancy Services

- **Accessing Email Messaging Service:** <http://webmail.incometax.gov.in> (Production URL)

E-mail Solution

  **TBA**
INCOME TAX BUSINESS APPLICATION

Username:

Password:

Sign In

© 2014-2015 Department of Income Tax, Government of India
Powered By **TATA** CONSULTANCY SERVICES

Webmail Documents

- [Webmail FAQ's](#)
- [Instructions for subscribing two emailIDs on single interface](#)
- [Webmail Configuration in Outlook over Taxnet](#)
- [Webmail Configuration in Outlook and Mobile over Internet](#)
- [Browser instructions for ITBA portal](#)

Helpdesk

- **Contact No :** 0120- 2772828 , 0120- 2772842
- **Email ID :** helpdesk_messaging@incometax.gov.in

Contact us:

URL of helpdesk - <http://itbahelpdesk.incometax.net>

Help desk number – 0120-2772828

Email ID – helpdesk_messaging@incometax.gov.in

Help desk Timings – 8.30 A.M. – 7.30 P.M. (Monday to Friday)

1.2 Table of Contents

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1.3 Introduction

Human Resource Management System (HRMS) module covers processes which helps in better and effective management of personal & administrative functions related to the ITD officials. HRMS Transfer and posting module is used to generate transfer orders for officers, which may be auto approved or need to be approved by the issuing authority. The channel of submission for approval workflow can be configured by admin based on which draft transfer order will be generated by the administrator and will become the final transfer order only after approval by the issuing authority.

1.4 Environment

Below mentioned links can be used for accessing the HRMS application:-

Intranet Link:- http://incometax.gov.in/ItbaPortal/faces/pages_home

1.5 HRMS Module User Roles

Following are the users of HRMS module:

- Employee
- Admin

1.6 List of Abbreviations

The list of abbreviations is as follows:

Table 1:- List of Abbreviations

S. No	Abbreviations	Description
1.	CCIT	Chief Commissioner of Income Tax
2.	CIT	Commissioner of Income Tax
3.	ITO	Income Tax Officer
4.	HRMS	Human Resource Management System
5.	ITBA	Income Tax Business Application
6.	ITD	Income Tax Department

2. Introduction to Transfer and Posting

Transfer and Posting module allows the employees to raise Transfer requests, get Transfer approved and view their status using the HRMS application.

This section explains the following processes of Transfer and Posting.

1. COS Setup to identify the approval levels
2. Transfer request submission by Employee
3. Transfer request submission by administrator on behalf of Employee
4. Transfer request approval by authorized approvers
5. View Transfer Request
6. Viewing Transfer request history
7. Transfer Report Submission
8. Transfer Report Approval
9. Transfer Request Cancellation by Administrator on behalf of employee

Transfer and Posting

2.1 Transfer and Posting Order

Transfer and Posting screen will be used for generating Transfer and Posting Order.

Navigation: - Main Menu → Transfer and Posting → Transfer and Posting Order

Below screen will be displayed to user when above mentioned navigation is clicked.

Enter any information you have and click Search. Leave fields blank for a list of all values.

Transfer and Posting Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request History | Create New Request

▼ Search Criteria

Request ID: begins with ▼

*Issuing Authority: begins with ▼ 🔍

Order No: begins with ▼

File No: begins with ▼

Request Date: = ▼ 31

Order Date: = ▼ 31

Rank: begins with ▼ 🔍

☐ Case Sensitive

Search Clear Basic Search 🔍 Save Search Criteria

Figure 1: Transfer and Posting – Search

Admin can access all previously generated transfer order on **Request History** Tab by selecting issuing authority from lookup. On click of **Create New Request** Tab below screen will be displayed and admin can create new transfer request:

Transfer and Posting Order

Request History | **Create New Request**

Request ID: NEW

Add

Request History | Create New Request

Figure 2: Transfer and Posting – New Request

On click of **Add** Button, below screen will be displayed:

Transfer and Posting Order

Request Details

Request ID: NEW Request Date: 15.02.2016

Order Details

*Issuing Authority: CBDT0001 CHAIRMAN CBDT Order Number: 102 OF 2016

*File Number: 1 *Order Date: 16.02.2016

*Mandatory Relieving Date: 16.02.2016 *Rank: ACIT/DCIT

*Transfer Method: By Post *Transfer Effective From Date: 16.02.2016

☐ Link a Promotion Order **Proceed**

Figure 3: Selecting Details

Before proceeding admin will have to fill the following mandatory fields:

1. Issuing Authority
2. Order Number – It will be auto Populated according to Issuing Authority.
3. File Number
4. Order Date
5. Mandatory Relieving Date
6. Rank (If selected rank is below CIT then Transfer Method will be By Post or By Office but if selected rank is above CIT then Transfer Method will be By Post only.)

Once admin fills all the mandatory fields and clicks on **Proceed** Button, below screen will be displayed:

Transfer and Posting Order

Request Details

Request ID NEW Request Date 15.02.2016

Order Details

*Issuing Authority CBDT0001 CHAIRMAN CBDT Order Number 102 OF 2016

*File Number 1 *Order Date 16.02.2016

*Mandatory Relieving Date 16.02.2016 *Rank ACIT/DCIT

*Transfer Method By Post *Transfer Effective From Date 16.02.2016

☐ Link a Promotion Order **Proceed**

Main Charge

Employee Details **Transfer Details**

Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450100	CIRCLE 19(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Additional Charge

Employee Details **Transfer Details**

Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450043	CIRCLE 20(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Attachment

Attachment	Date	Comments
1 Add Attachment		

Comments

Comments

Save **Submit**

Figure 4: Transfer Details

Admin can select employee for transfer with Main Charge and Additional Charge. For Main Charge, admin will have to select employee from Lookup in Employee Details Tab, after selecting Employee ID from the lookup, Civil List Number, Name, Date of Birth, Present Post, Present Office and Present Place will be auto populated as shown in below screen:

Main Charge

Employee Details **Transfer Details**

Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450100	CIRCLE 19(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Figure 5.1: Main Charge (Employee Details)

Main Charge  First 1 of 1 Last

Employee Details **Transfer Details** 

Employee ID	Name	Whether OSD or not?	*New Post	New place	Remarks
1209927	ADITI GOYAL	<input type="checkbox"/>	CIRCLE 22(2), DELHI	DELHI (UT)	

Figure 5.2: Main Charge (Transfer Details)

After entering employee details, admin will have to enter the New Post, Transfer Effective Date in Transfer Details Tab as shown in below screen:

Main Charge					
Employee Details Transfer Details					
Employee ID	Name	Whether OSD or not?	*New Post	New place	Remarks
1 209927	ADITI GOYAL	<input type="checkbox"/>	CIRCLE 22(2), DELHI	DELHI (UT)	

Figure 6: Transfer Details

After entering Main Charge details, admin can select employee for Additional Charge in Additional Charge details. After entering all the details and after submitting the request below screen will be displayed:

Transfer and Posting Order						
Request Details						
Request ID TRNORD0381			Request Date 15.02.2016			
Order Details						
*Issuing Authority CBDT0001		CHAIRMAN CBDT		Order Number 102 OF 2016		
*File Number 1				*Order Date 16.02.2016		
*Mandatory Relieving Date 16.02.2016				*Rank ACIT/DCIT		
*Transfer Method By Post				*Transfer Effective From Date 16.02.2016		
<input type="checkbox"/> Link a Promotion Order						
Main Charge						
Employee Details Transfer Details						
Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450100	CIRCLE 19(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI
Additional Charge						
Employee Details Transfer Details						
Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450043	CIRCLE 20(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI
Status						
Pending with ITO W-10(1)-3 MUM						
Delete Request						

Figure 7: Transfer and posting request submission

The page contains two tabs as in Main Charge i.e. Employee Details and Transfer Details. The Employee ID field has a lookup which shows all the Employee ID along with their names. On Selecting the employee ID from the lookup, the details of the employee is auto-populated. The second tab contains New Post field which is a lookup field for selecting the post for which the user wants to apply.

If the employee has an additional charge, same can be filled in the Additional Charge group box. User needs to click on the SAVE Button before submitting.

Additional Charge						
Employee Details Transfer Details						
Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL	110CC	22450043	CIRCLE 20(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Figure 8.1: Additional Charge (Employee Details)

Additional Charge				
Employee Details Transfer Details				
Employee ID	Name	Whether OSD or not?	*To Hold Additional Charge of Post	Remarks
1 209927	ADITI GOYAL	<input type="checkbox"/>	CIRCLE 17(2), DELHI	

Figure 8.2: Additional Charge (Transfer Details)

After the data is saved, Draft Transfer Option gets enabled to fill the details respectively. After finalizing the order, the request is submitted. Hence the Generate order button gets enabled and can be viewed on clicking on the same.

Please note, after the submission, the status group box shows the status of the transfer request showing pending or approved. It also displays the Employee ID of the approver with whom it is pending. The transfer request cannot be deleted after it is submitted.

Transfer and Posting Order

Request Details

Request ID	TRNORD0381	Request Date	15.02.2016
------------	------------	--------------	------------

Order Details

*Issuing Authority	CBDT0001	CHAIRMAN CBDT	Order Number	102 OF 2016
*File Number	1		*Order Date	16.02.2016
*Mandatory Relieving Date	16.02.2016		*Rank	ACIT/DCIT
*Transfer Method	By Post		*Transfer Effective From Date	16.02.2016

☐ Link a Promotion Order

Main Charge First 1 of 1 Last

Employee ID	Name	Date of Birth	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL		110CC	22450100	CIRCLE 19(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Additional Charge First 1 of 1 Last

Employee ID	Name	Date of Birth	Civil List No	Post ID	Present Post	Present Office	Present Place
1 209927	ADITI GOYAL		110CC	22450043	CIRCLE 20(3), MUMBAI	CCIT, Mumbai - 7	MUMBAI

Attachment First 1 of 1 Last

Attachment	Date	Comments
1 Add Attachment		

Order Movement History

Order Movement History

Comments

Comments

Figure 9: Approvers Screenshot

Worklist

Worklist for U104734: ANIL MORESHWAR TIKARE

Detail View


From	Date From	Link
RADHASHYAM MITTAL	05.01.2016	Transfer Order Request
RADHASHYAM MITTAL	08.01.2016	Transfer Order Request
RADHASHYAM MITTAL	28.01.2016	Transfer Order Request
RADHASHYAM MITTAL	03.02.2016	Transfer Order Request

Refresh

Figure 10: Worklist Screenshot

Once the Transfer Order is approved, admin can generate the Transfer Order. Transfer Order can be modified before saving the order, once the order saved admin can't edit the order.

Generated transfer order is shown below:



GOVERNMENT OF INDIA,
OFFICE OF THE PRINCIPAL CHIEF COMMISSIONER OF INCOME-TAX,
[BIHAR & JHARKHAND REGION]
BIR CHAND PATEL PATH, PATNA
PHONE: 2504447, EPABX-2504020-22, 2504024-25, 2504580-83, FAX: 0612-2504556

F.No: 1
Dated: 02/15/2016

Order No: 102 OF 2016

Dated, Patna the 02/15/2016

F.No: 1

The following transfer & posting in the ACIT/DCIT are hereby ordered with immediate effect and their services are placed in the offices mentioned against their names until further orders

Main Charge:

S.No.	Name(Sri/Smt)	Present Posting	At the disposal of	Station	Remarks
1	ADITI GOYAL	CIRCLE 19(3), MUMBAI	CCIT, Delhi-8	AAYKAR BHAWAN	

Page 1 of 2

Figure 11.1: Transfer Order (Page 1)

Additional Charge:

S.No.	Name(Sri/Smt)	Present Posting	At the disposal of	Station	Remarks
1	ADITI GOYAL	CIRCLE 20(3), MUMBAI	CCIT, Delhi-6	AAYKAR BHAWAN	


Note:- The consequential orders may be passed by the concerned authorities within ten days of this order.

Dated: 02/15/2016

Memo. No.

Copy for information to :-

1. The CCIT, Ranchi
2. The DGIT(Inv), Patna
3. All the PCsIT/CsIT/PDsIT/DsIT in Bihar & Jharkhand
4. ZAO, CBDT, Alankar Place, Boring Road, Patna
5. The General Secretary, ITEF, Patna
6. Person concerned
7. Guard File.



()
Pr. Chief Commissioner of Income Tax (B&J), Patna
Dated:

()
Dy. Commissioner of Income Tax (HQ) (Admin)
For : Pr. Chief Commissioner of Income Tax (B&J), Patna

Page 2 of 2

Figure 11.2: Transfer Order (Page 2)

2.2 Transfer and Posting Order – Manual

Navigation: - Main Menu → Transfer and Posting → Transfer and Posting Order-Manual

In order to submit the Transfer Manual application, employee will access the below screen through the Main Menu -Transfer and Posting- Transfer Order-Manual.

Enter any information you have and click Search. Leave fields blank for a list of all values.

Transfer and Posting Order can be generated by admin, but there is no approval required from authority, after submitting the order admin can generate the order. The Process to generate order is same as explained in section 1.1.

Transfer and Posting Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request History | Create New Request

▼ Search Criteria

Request ID: begins with ▼

*Issuing Authority: begins with ▼ 🔍

Order No: begins with ▼

File No: begins with ▼

Request Date: = ▼ 📅

Order Date: = ▼ 📅

Rank: begins with ▼ 🔍

☐ Case Sensitive

Search Clear Basic Search 📄 Save Search Criteria

Figure 12: Transfer and Posting – Search

Admin can access to all previously generated transfer order on **Request History** Tab by selecting issuing authority from lookup. On click of **Create New Request** Tab below screen will be displayed and admin can create new transfer request:

Transfer and Posting Order

Request History | **Create New Request**

Request ID: NEW

Add

Request History | Create New Request

Figure 13: Transfer and Posting – New Request

On click of **Add** Button, below screen will be displayed:

Transfer and Posting Order

Request Details

Request ID NEW Request Date 15.02.2016

Order Details

*Issuing Authority CBDT0001 CHAIRMAN CBDT Order Number 103 OF 2016

*File Number 1 *Order Date 16.02.2016

*Mandatory Relieving Date 16.02.2016 *Rank ACIT/DCIT

*Transfer Method By Post *Transfer Effective From Date 16.02.2016

☐ Link a Promotion Order

Proceed

Figure 14: Selecting Details

Before proceeding admin will have to fill the following mandatory fields:

1. Issuing Authority
2. Order Number – It will be auto Populated according to Issuing Authority.
3. File Number
4. Order Date
5. Mandatory Relieving Date
6. Rank (If selected rank is below CIT then Transfer Method will be By Post or By Office but if selected rank is above CIT then Transfer Method will be By Post only.)

Once admin fills all the mandatory fields and clicks on **Proceed** Button, below screen will be displayed:

Transfer and Posting Order

Request Details

Request ID: NEW Request Date: 15.02.2016

Order Details

*Issuing Authority: CBDT0001 CHAIRMAN CBDT Order Number: 103 OF 2016

*File Number: 1 *Order Date: 16.02.2016

*Mandatory Relieving Date: 16.02.2016 *Rank: ACIT/DCIT

*Transfer Method: By Post *Transfer Effective From Date: 16.02.2016

☐ Link a Promotion Order

Proceed

Main Charge

Employee Details | Transfer Details

Employee ID	Name	Whether OSD or not?	*New Post	New place	Remarks
1 212474	SAJIT NAIR	<input type="checkbox"/>	CIRCLE 16(2), DELHI	DELHI (UT)	

Additional Charge

Employee Details | Transfer Details

Employee ID	Name	Whether OSD or not?	*To Hold Additional Charge of Post	Remarks
1 212474	SAJIT NAIR	<input type="checkbox"/>	CIRCLE 20(1), DELHI	

Attachment

Attachment	Date	Comments
1 Add Attachment		

Comments

Comments

Save **Submit**

Figure 15: Transfer Details

Admin can select employee for transfer with Main Charge and Additional Charge. For Main Charge, admin will have to select employee from Lookup in Employee Details Tab, after selecting Employee ID from lookup, Civil List Number, Name, Date of Birth, Present Post, Present Office and Present Place will be auto populated as shown in below screen:

Main Charge

Employee Details | Transfer Details

Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 212474	SAJIT NAIR	10575	49000486	DCIT/ACIT(HQ) AURANGABAD	DCIT/ACIT(HQ) AURANGABAD	PUNE

Figure 16.1: Main Charge (Employee Details)

Main Charge First 1 of 1 Last

Employee Details **Transfer Details**

Employee ID	Name	Whether OSD or not?	*New Post	New place	Remarks
1 212474	SAJIT NAIR		CIRCLE 16(2), DELHI	DELHI (UT)	

Figure 16.2: Main Charge (Transfer Details)

After entering employee details, admin will have to enter the New Post, Transfer Effective Date in Transfer Details Tab as shown in below screen:

Main Charge					
Employee Details Transfer Details					
Employee ID	Name	Whether OSD or not?	*New Post	New place	Remarks
1 212474	SAJIT NAIR		CIRCLE 16(2), DELHI	DELHI (UT)	

Figure 17: Transfer Details

After entering Main Charge details, admin can select employee for Additional Charge in Additional Charge details with same above mentioned Main Charge. After entering all the details and after submitting the request below screen will be displayed:

Transfer and Posting Order						
Request Details						
Request ID TRNORD0382	Request Date 15.02.2016					
Order Details						
*Issuing Authority CDBT0001	CHAIRMAN CDBT					
*File Number 1	*Order Date 15.02.2016					
*Mandatory Relieving Date 16.02.2016	*Rank ACIT/DCIT					
*Transfer Method By Post	*Transfer Effective From Date 16.02.2016					
<input type="checkbox"/> Link a Promotion Order						
Main Charge						
Employee Details Transfer Details						
Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 212474	SAJIT NAIR	10575	49000486	DCIT/ACIT(HQ) AURANGABAD	DCIT/ACIT(HQ) AURANGABAD	PUNE
Additional Charge						
Employee Details Transfer Details						
Employee ID	Name	Civil List No	Post ID	Present Post	Present Office	Present Place
1 212474	SAJIT NAIR	10575	49000161	DCIT/ACIT CIR 10 PUNE	DCIT/ACIT CIR 10 PUNE	PUNE
Status						
Approved from Auto Approved						
View Order				Delete Request		

Figure 18: Transfer and posting request submission

The page contains two tabs as in Main Charge i.e. Employee Details and Transfer Details. The Employee ID field has a lookup which shows all the Employee ID along with their names. On Selecting the employee ID from the lookup, the details of the employee is auto-populated. The second tab contains New Post field which is a lookup field for selecting the post for which the user wants to apply.

If the employee has an additional charge, same can be filled in the Additional Charge group box. User needs to click on the SAVE Button before submitting.

After the data is saved, Draft Transfer Option gets enabled to fill the details respectively. After finalizing the order, the request is submitted. Hence the Generate order button gets enabled and can be viewed on clicking on the same.

2.3 Disposition List

If admin wants to search how many positions are vacant and how many are occupied on the basis of CCA Region and Rank then admin will use the below navigation

Navigation: - Main Menu → Transfer and Posting → Disposition List

Below screen will be displayed to user when above mentioned navigation clicked:

Figure 19: Disposition List

Admin will select the CCA Region and Rank from lookup and click on **Proceed** button. On Click of proceed button, a grid will displayed will all positions whether occupied or vacant as shown in below screen:

Post Number	Post Description	CCA Region	Employee ID	Civil List No	Name
1 45000115	DCIT/ACIT(VIG) CCIT NAGPUR	CCA NAGPUR	113736	115DM	ABHAY MARATHE
2 45000144	DCIT/ACIT(CEN)-1(2) NAGPUR	CCA NAGPUR	117101	115BL	SHYAM RATHI
3 45000115	DCIT/ACIT(VIG) CCIT NAGPUR	CCA NAGPUR	163183	090AF	SHRADDHA NICHAL
4 45000080	DCIT/ACIT CIR-6(1) NAGPUR	CCA NAGPUR	164542	100AB	ABHAY NANNAWARE
5 45000040	DCIT/ACIT CIR-2(1) NAGPUR	CCA NAGPUR	166830	110EJ	SANJAY DHIVARE
6 45000034	DCIT/ACIT CIR-1(1) NAGPUR	CCA NAGPUR	201929	090DW	SHASHI KUSHWAHA
7 45000143	DCIT/ACIT(CEN)-1(1) NAGPUR	CCA NAGPUR	202898	100AG	AKHILESH YADAVA
8 45000111	DCIT/ACIT(HQ) CIT-IV NAGPUR	CCA NAGPUR	205291	115EH	SAROJINI XESS
9 45000054	DCIT/ACIT CIR-3(1) NAGPUR	CCA NAGPUR	206165	110EY	MANICKAM M.
10 45000090	DCIT/ACIT(HQ) CIT-III NAGPUR	CCA NAGPUR	210084	105ES	C POJGE

Figure 20: Disposition List – Search

2.4 Transfer and Posting Report

If admin wants to check how many transfer orders are generated then admin will use the below navigation.

Navigation: - Main Menu → Transfer and Posting → Transfer and Posting Reports

Below screen will be displayed to user when above mentioned navigation clicked:



Figure 21: Transfer Report

Admin can search order details on the basis of any following fields:

- Year: Click on year field to select the year.
- Order Generated By: Click on Order Generated By to select the Issuing Authority.
- From Date: Select the first day of the period.
- To Date: Select the last Day of the period.
- CCA Region: Click on CCA Region to select the region from the Lookup.
- Rank: Click on Rank to select the Rank.

Once admin enter the fields, and click on **Proceed** button, Order details will be displayed as shown below:

Transfer and Posting Reports

Transfer and Posting Reports

Year 2015 Order Generated By

From Date To Date

CCA Region Rank CCIT/DGIT

Proceed

Request ID	Issuing Authority	Order Number	File Number	Request Date	Order Date	CCA Region	Rank	Employee ID
1 TRNORD0112	CBDT0001	239 OF 2015	12345	10.04.2015	10.04.2015	CCSHR	CCIT/DGIT	10057755
2 TRNORD0118	49000001	42 OF 2015	42 OF 2015	12.06.2015	12.06.2015	CCPNE	CCIT/DGIT	100171
3 TRNORD0122	CBDT0001	246 OF 2015	F.NO-789	13.06.2015	13.06.2015	CCSHR	CCIT/DGIT	100171
4 TRNO000055	CBDT0001	208 OF 2015	12345	16.01.2015	16.01.2015	CCSHR	CCIT/DGIT	10057755
5 TRNO000040	CBDT0001	206 OF 2015	1235	09.01.2015	09.01.2015	CCSHR	CCIT/DGIT	10057755
6 TRNO000056	CBDT0001	209 OF 2015	12345	16.01.2015	16.01.2015	CCSHR	CCIT/DGIT	10057755
7 TRNO000067	CBDT0001	211 OF 2015	12345	27.01.2015	27.01.2015	CCSHR	CCIT/DGIT	10057755
8 TRNO000069	CBDT0001	212 OF 2015	12345	27.01.2015	27.01.2015	CCSHR	CCIT/DGIT	10057755
9 TRNO000071	CBDT0001	213 OF 2015	NVHVH	27.01.2015	02.02.2015	CCSHR	CCIT/DGIT	10057755
10 TRNORD0087	CBDT0001	221 OF 2015	F.NO. 400/2014-15	09.03.2015	09.03.2015	CCSHR	CCIT/DGIT	10057755
11 TRNORD0088	CBDT0001	222 OF 2015	F.NO. 401/2014-15	09.03.2015	09.03.2015	CCSHR	CCIT/DGIT	10057755
12 TRNO000029	CBDT0001	201 OF 2015	FILE 0701/2015	07.01.2015	07.01.2015	CCSHR	CCIT/DGIT	10057755
13 TRNO000038	CBDT0001	205 OF 2015	1345	09.01.2015	09.01.2015	CCSHR	CCIT/DGIT	10057755
14 TRNO000081	CBDT0001	217 OF 2015	F.NO. 12345	12.02.2015	12.02.2015	CCSHR	CCIT/DGIT	10057755

Figure 22: Transfer and Posting Reports

The above page figure describes the entire transfer request in the year 2015.

2.5 COS Setup

Navigation: - Main Menu → Transfer and Posting → COS Setup

The COS Setup is dependent on three fields:

1. CCA Region
2. Location
3. Department

There are three levels of approval process:

1. The first person generates the order on behalf of Issuing Authority.
2. The second person is the approver to approve.
3. The third person is the Issuing Authority itself.

Channel of Submission(COS) Setup

*Issuing Authority CHAIRMAN CBDT

COS Setup
Find | View All
1 of 2
Last

Channel Type Forwarding Channel

Approval level	Post Number	Post Name	Incumbent Name		
1	60000138	ITO(HQ)(ADMN) CIT BHAGALPUR	RADHASHYAM MITTAL	+	-
2	80000469	ITO W-10(1)-3 MUM	ANIL TIKARE	+	-
3	CBDT0001	CHAIRMAN CBDT	TEST95 TEST95	+	-

Note: Changes made in Forwarding channel will reflect into Inward channel, once the COS is saved.

Order No Setup

*Order No 200 OF 2014

Save

Figure 23: Channel of Submission (COS) Setup



Income Tax Business Application (ITBA)

Transfer Management Module – Frequently Asked Questions (FAQs)

February 2017, Version 1

❖ **I don't know my employee ID, to whom should I contact?**

Please contact your RCC admin of your region for the employee id.

❖ **I know my employee ID, how will I login in the HRMS / Transfer Management?**

The employee ID pre fixed by U becomes your user id, like 123456 is your employee ID than your user ID will be 'U123456'. Click on the below mentioned linked and you will be asked to enter your login details like user id and password details. Once you have successfully entered your credentials than you will be login inside the HRMS/ Transfer Management.

URL LINK: <https://itba.incometax.gov.in>

❖ **I forget or don't remember my password, how will I recover it?**

There is forget password option on the in the login screen, once you have reset the password the new password will sent to your income tax email id.

❖ **How many types of Transfers are there?**

Transfers are of 2 types in the Transfer Management Module of HRMS:

1. **By POST:** Here, the designation of the employee getting transferred remains same but the POST Number changes.
2. **By Office:** This transfer happens within a specific region. The employee is transferred to a different office of the same region

❖ **How many types of Transfer Orders are there?**

There are 2 types of Transfer Orders in the Transfer Management Module of HRMS:

1. **Manual:** In Manual, the order is auto approved at the same time without going through any channels for further approval.
2. **Transfer & Posting Order:** In this type, the order issued is routed through the approver channels for further approval.

❖ **What is the navigation to Transfer & Posting?**

Navigation: Go to **HRMS Application** → **Transfer & Posting**

❖ **How to issue a Manual Transfer Order?**

Navigation: Go to **HRMS Application** → **Transfer & Posting** → **Transfer order-Manual**.

❖ **How to issue a Transfer & Posting Order?**

Navigation: Go to **HRMS Application** → **Transfer & Posting** → **Transfer & Posting order**.

❖ **Whose name I need to give in Issuing Authority?**

Issuing Authority is the person on whose behalf the letter will be getting generated. The name of the same can be selected from the lookup.

❖ **The field label "Order Number" is coming non editable. How to make it editable?**

Order number is automatically generated upon selection of "Issuing Authority" from the lookup. The user need not edit anything the field.

❖ **What needs to be entered in File Number?**

File Number is the field where number of the respective File will be entered. This field accepts both Numbers and Characters.

❖ **What is Order Date?**

Order Date is the Date on which the order is getting issued. It can be the present day's date or a future date but it can't be a previous date.

❖ **What is Mandatory Relieving Date?**

Relieving Date is the Date on which the employee is getting relieved from a certain post.

❖ **What all charges are transferrable?**

Main charge and the Additional Charge that the employee might be having for the respective rank are transferrable.

❖ **Can I issue order for more than one employee?**

Yes. Transfer order for more than one employee is possible. You will have to click "+" button at the end of the row.

❖ **What is New Post to be entered in Transfer Details tab?**

In this field the user will have to select the POST from the lookup to which the employee is getting transferred.

❖ **What does Save button do?**

Save button saves the Transfer Order as a Draft for future editing and reference.

❖ **What does Submit button do?**

Submit button submits the Transfer Order and no more editing is permitted post-submission. Also the Order can be submitted only after it has been finalized by clicking on "Draft Transfer Order" button. The report can be previewed also before finalizing.

❖ **What are different types of "Report Body"?**

Body of the report can be of 2 types:

1. Auto: In this type, the preset language is auto populated and need not be typed manually.
2. Manual: Here, the user will have to type the language manually.

❖ **How can I generate Transfer Report?**

Navigation: Go to **HRMS Application** → **Transfer & Posting** → **Generate Transfer Report**.

The user will have to select the Issuing Authority and the Order Number.

❖ **What is Disposition List?**

Disposition List gives you the information regarding status (filled and vacant) of various posts under a certain rank and CCA Region.