



interactive Personnel Electronic Records Management System (iPERMS)

Scan Operator Training





Agenda

- Introduction
- Documents required for filing in Soldiers' AMHRR
- Scan and create batches in TIFF and PDF format for processing
- Uploading/Scanning batches into iPERMS
- Batch Originator Report/Rescan Queue
- Questions



Documents required for filing in Soldiers' AMHRR

Information regarding documents required for filing in the AMHRR can be found at the following two sources:

[AR 600-8-104](#)

[Required Documents](#)

Accredited Academic Institutions

To view a complete list of accredited institutions, go to: [Accreditation Website](#)



U.S. Department of Education [Home](#) [FAQ about Accreditation](#) [FAQ about this website](#) [Glossary](#) [Help](#)

 The Database of Accredited Postsecondary Institutions and Programs

OFFICE OF POSTSECONDARY EDUCATION

Accreditation > Select an Institution

[Export Accreditation Data of Results](#) [New Search](#)

There is 1 Institution found.

- Select one of the institutions to view details
- All campuses for an institution are listed below with an arrow.
- You can sort the list by clicking a column header.
- Not all campuses offer all programs; please click on a campus name to verify accredited programs.

[I can't find my institution. Show me the history](#)

Institution	Address	City	State
Sullivan University	3101 Bardstown Rd	Louisville	KY
▶ Ft. Knox	P.O. Box 998 63 Quartermaster	Ft. Knox	KY
▶ Lexington	2355 Harrodsburg Road	Lexington	KY

[Click here for more information about Accreditation in the U.S.](#)

DA Selection Boards



- There is a separate process for uploading board related documents
- Must have **BOARD** written in the container field
- Upload only documents filed in the performance folder; i.e., civilian transcripts and course completions 40 hours or more
- Board batches are processed within three duty days
- Do not send documents that are not board related
- **ONLY** for board eligible Soldiers

Evaluation Reports



Do not upload OER's, NCOER's,
1059's or 1059-1's



- All evaluations for Active and Reserve Components must be submitted to the Evaluations Branch at HRC. National Guard follow state guidelines
- For more information on the process of submitting evaluations to the Evaluations Branch, go to their webpage at [Evaluation Branch Homepage](#)

CLASSIFIED DOCUMENTS



- Do not scan and upload Classified Documents that contain and/or labeled “Classified” (Secret, Top Secret or Confidential) into iPERMS
- The iPERMS system is unclassified, only unclassified documents are authorized in iPERMS



ADVERSE ACTIONS

- Adverse actions should be sent by your unit's legal office utilizing Military Justice Online (MJO)
- Reserve personnel do not have access to MJO, so adverse actions must be emailed encrypted to:
usarmy.knox.hrc.mbx.perms-records@mail.mil
- If you have questions, call the Record Maintenance and Updates team at 502-613-9990 (press 3) or DSN 983-9900 (press 3)

Batch Preparation

- Must have Scan Operator or Field Operator role
- Determine web uploading requirements
- Use web uploading tools to create a batch
- Arrange images in batch





Session Role

The screenshot shows a web browser window with the address bar displaying "http://iperm-int...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the "ARMY MILITARY HUMAN RESOURCE RECORD" logo, the "iPERMS Personnel Electronic Records Management System" logo, and a banner for "FORT KNOX STRENGTH STARTS HERE" with the "U.S. ARMY" logo. The main content area is titled "Primary Records Center - Select Role" and contains the following sections:

- Select Session Role**
You have credentials with iPERMS Online for one or more roles. Please select the appropriate role for this session:
 - [System Administrator](#)
 - [Scan Operator in AA](#)
 - [Record Manager in AA](#)
 - [Scan Operator in AV](#)
 - [Authorized Official](#)
- Preferences**
 - [E-Mail Preferences](#)
- Review Acknowledgements**
 - [IS User Agreement](#)
 - [Privacy Act Acknowledgement](#)
- Logout**
 - [Logout](#)

The footer of the page displays the text "iPERMS 1.9.9-#11112 / Intapp02/RMS_02-2".



Image Requirement

Must be:

Upload images to batch {new}

iPERMS supports Web Uploading of TIFF and PDF files. Each document should conform to the following standards.

TIFF Standards

- 300 dpi
- monochrome
- CCITT group 4 compression format
- Average page size of 3MB or less
- 100MB maximum file size

PDF Standards

- 300 - 600 dpi (for scanned black/white pages)
- 300 - 400 dpi (for scanned color/grayscale pages)
- Average page size of 3MB or less
- 100MB maximum file size
- Portfolio PDF not allowed

Please refer to the [Web Upload How-To Guide](#) for detailed guidance.

LEGEND: Shaded cells to be filled before which are not applicable

PERSONAL DATA		1. LAST NAME - FIRST NAME - MIDDLE NAME		2. SERVICE NUMBER		3. GRADE, RATE OR RANK		4. DATE OF BIRTH (Day, Month, Year)	
5. DEPARTMENT, COMPONENT AND BRANCH OR CLASS		6. PLACE OF BIRTH (City and State or Country)		7. DATE OF ENTRY		8. DATE OF BIRTH		9. MARITAL STATUS	
10. RACE		11. SEX		12. COLOR HAIR		13. COLOR EYES		14. HEIGHT	
15. HIGHEST CIVILIAN EDUCATION LEVEL ATTAINED		16. MAJOR COURSE OR FIELD		17. RESIDIT		18. U.S. CITIZEN		19. YES <input type="checkbox"/> NO <input type="checkbox"/>	
20. TYPE OF TRANSFER OR DISCHARGE		21. STATION OR INSTALLATION AT WHICH EFFECTED		22. REASON AND AUTHORITY		23. EFFECTIVE DATE		24. DAY MONTH YEAR	
25. LAST DUTY ASSIGNMENT AND MAJOR COMMAND		26. CHARACTER OF SERVICE		27. TYPE OF CERTIFICATE ISSUED		28. DATE INDUCED		29. DAY MONTH YEAR	
30. SELECTIVE SERVICE NUMBER		31. SELECTIVE SERVICE LOCAL BOARD NUMBER, COUNTY AND STATE		32. DATE INDUCED		33. DAY MONTH YEAR		34. DISTRICT OR AREA COMMAND TO WHICH REASSIGNED TRANSFERRED	
35. TERMINAL DATE OF RESERVE REGISTRATION		36. CURRENT ACTIVE SERVICE OTHER THAN BY PRODUCTION		37. SOURCE OF ENTRY		38. TYPE OF SERVICE (If any)		39. DATE OF ENTRY	
40. PRIOR RESERVE AIR ENGAGEMENTS		41. SPECIAL RATE OR RANK AT TIME OF ENTRY INTO CURRENT ACTIVE SERVICE		42. PLACE OF ENTRY INTO CURRENT ACTIVE SERVICE (City and State)		43. STATEMENT OF SERVICE		44. YEARS MONTHS DAYS	
45. HOME OF RECORD AT TIME OF ENTRY INTO ACTIVE SERVICE (Street, RFD, City, County and State)		46. STATEMENT OF SERVICE		47. NET SERVICE THIS PERIOD		48. OTHER SERVICES		49. DATE OF ENTRY	
50. BRIGADIER NUMBER AND TEST #		51. RELATER OVER 18M OCCUPATION AND U.S.I. NUMBER		52. TOTAL ACTIVE SERVICE		53. FOREIGN AND/OR SEA SERVICE		54. OTHER SERVICES TRAINING COURSES SUCCESSFULLY COMPLETED	
55. DECORATIONS, MEDALS, BADGES, COMMENDATIONS, CITATIONS AND CAMPAIGN PRISONS AWARDED OR AUTHORIZED		56. WOUNDS RECEIVED AS A RESULT OF ACTION WITH ENEMY FORCES (Place and date, if known)		57. SERVICE SCHOOLS OR COLLEGES, COLLEGE TRAINING COURSES AND/OR POST-GRADUATE COURSES SUCCESSFULLY COMPLETED		58. OTHER SERVICES TRAINING COURSES SUCCESSFULLY COMPLETED		59. OTHER SERVICES TRAINING COURSES SUCCESSFULLY COMPLETED	
60. GOVERNMENT LIFE INSURANCE IN FORCE		61. AMOUNT OF ALLOWMENT		62. SIGNATURE OF PERSON BEING TRANSFERRED OR DISCHARGED		63. SIGNATURE OF OFFICER AUTHORIZED TO SIGN		64. CLEAR NUMBER	
65. VA BENEFIT PREVIOUSLY APPLIED FOR (Specify type)		66. REMARKS		67. PERMANENT ADDRESS FOR MAIL AND PURPOSES AFTER TRANSFER OR DISCHARGE (Street, RFD, City, County and State)		68. SIGNATURE OF OFFICER AUTHORIZED TO SIGN		69. SIGNATURE OF OFFICER AUTHORIZED TO SIGN	
70. TYPED NAME, GRADE AND TITLE OF AUTHORIZING OFFICER		71. SIGNATURE OF OFFICER AUTHORIZED TO SIGN		72. TYPED NAME, GRADE AND TITLE OF AUTHORIZING OFFICER		73. SIGNATURE OF OFFICER AUTHORIZED TO SIGN		74. SIGNATURE OF OFFICER AUTHORIZED TO SIGN	

DD FORM 214 (8 Part) REPLACES EDITION OF 1 JUL 52 WHICH IS OBSOLETE
ARMED FORCES OF THE UNITED STATES REPORT OF TRANSFER OR DISCHARGE 2



iPERMS

Transmittal Letter

Date _____

Sender Name _____

Sender Phone # _____

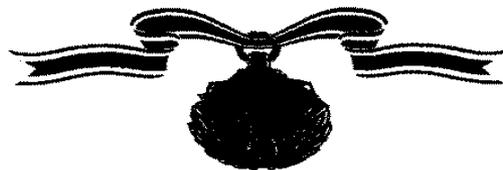
Sender Enterprise Email Address



Social Security Numbers

Ensure the full SSN is clearly written in the top right corner on each image.

123-45-6789



THE UNITED STATES OF AMERICA

TO ALL WHO SHALL SEE THESE PRESENTS, GREETING: THIS IS TO CERTIFY THAT THE PRESIDENT OF THE UNITED STATES OF AMERICA AUTHORIZED BY EXECUTIVE ORDER, 16 JANUARY 1969 HAS AWARDED

THE MERITORIOUS SERVICE MEDAL

TO **MASTER SERGEANT [Joe Snuffy]**
UNITED STATES ARMY FINANCIAL MANAGEMENT COMMAND

FOR exceptionally meritorious service while serving as a Senior Financial Management Trainer for the Operational Support Team, United States Army Financial Management Command. His technical expertise and attention to detail were invaluable to the overall success of his team and the organization. His selfless service and dedication to Soldiers were critical qualities enabling him to successfully contribute to the team, while providing world-class training to deploying units of the financial management community. Master Sergeant K's instinctive accomplishments reflect great credit upon himself, the Office of the Assistant Secretary of the Army (Financial Management and Comptroller), and the United States Army.

1 August 2008 – 31 October 2010

Given this 8th day of October 2010

PC
HQDA, ODCS, G-8
Pentagon
Washington, DC 20310-0700



Mary Sally Matiella
Mary Sally Matiella, CPA
Assistant Secretary of the Army
(Financial Management and Comptroller)

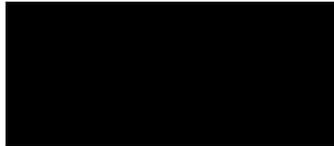
DA FORM 4980-10, NOV 97



Redacting Documents

**Original
Document**

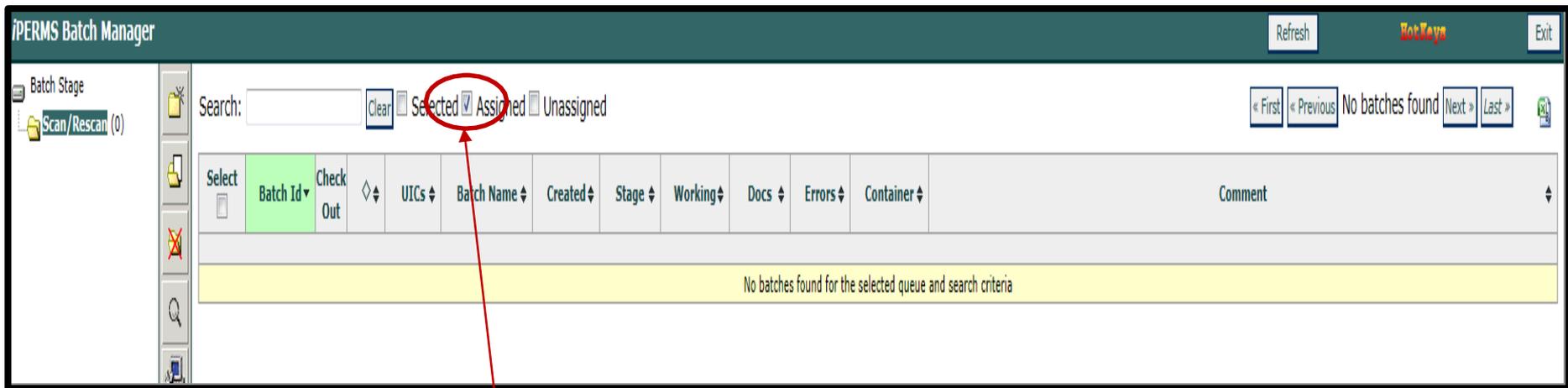
PV1	John Smith	123-45-6789
PV1	Tracey Doe	234-56-7891
PV1	<u>lllbe</u> Alright	345-67-8912
PV1	<u>Snuffie</u> Smith	456-78-9123
PV1	Michael <u>N'ike</u>	567-89-1234

		
PV1	Michael <u>N'ike</u>	567-89-1234

**Redacted
Document**

Documents should never have multiple Soldier's PII listed on the same document. In the case of older documents that have multiple Soldier's PII on it, you must redact the other Soldiers information from the document. DODID numbers are treated the same as SSNs. We will not accept documents that have multiple Soldier's PII listed and have not been redacted.

Batch Manager View



iPERMS Batch Manager

Refresh HotKeys Exit

Batch Stage

Scan/Rescan (0)

Search: [] Clear Selected Assigned Unassigned

« First « Previous No batches found Next » Last »

Select	Batch Id	Check Out	UICs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment
No batches found for the selected queue and search criteria											

When you log into the Scan Operator role, this is the first screen that will appear. In order to see the complete list of batches in the Scan/Rescan queue, you will need to uncheck the “Assigned” button. This is an automatic default.

Scanning Toolbars

iPERMS Batch Manager Refresh **Hot Keys** Exit

Batch Stage
Scan/Rescan (148)

Search: Selected Assigned Unassigned

« First « Previous 1 to 25 of 148 batches Next » Last »

Select	Batch Id	Check Out	UICs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment
<input type="checkbox"/>	18886	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	- / -	Scan Batch 2	2014-09-09 01:17:50	S		2 / 2		GENERATED	Generated by CreateBatches
<input type="checkbox"/>	18887	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	- / -	Scan Batch 3	2014-09-09 01:17:50	S		1 / 1		GENERATED	Generated by CreateBatches



Create a new batch - button allows you to create a batch by uploading images to the server or by web scanning

Check out a batch - button allows you to enter a specific Batch ID to check out a batch

Delete a batch - button allows you to enter a specific Batch ID to delete a batch

Batch Search - button allows you to enter a Batch ID or text to search for a specific batch only among the batches displayed

Install JRE - button provides access to the iPERMS installer window. A user can download Java, a scanner certificate and an image viewer used for web-based scanning

IQC Reports Menu - button allows a batch creator access to the Batch Originator Status Report

Scanning Toolbars (cont.)



Batch Id	Check Out	UICs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment
18886	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	- / -	Scan Batch 2	2014-09-09 01:17:50	S		2 / 2		GENERATED	Generated by CreateBatches
18887	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	- / -	Scan Batch 3	2014-09-09 01:17:50	S		1 / 1		GENERATED	Generated by CreateBatches

Batch ID - lists the system generated batch number.

Check Out - button opens the batch for processing (*If a batch is already checked out, the button changes from Check Out to Override*)

Batch name - lists the batch name generated during scanning or modified during batch processing

Created - lists the date when the batch was scanned or imported

Stage - lists the stage the batch is in

Working - lists the AKO user ID for the person who currently has the batch checked out

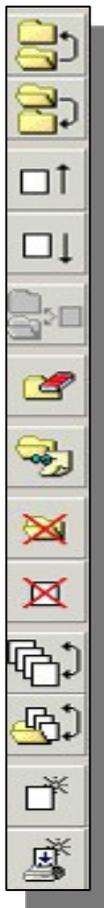
Docs - lists the number of documents and images in the batch

Errors - lists the number of errors associated with the batch

Container - Contains information with additional instructions input by the Scan Operator, such as board batches, SGLV documents, etc

Comment - lists any comment entered during processing

Batch Editing Toolbar



- 1 Join Up-joins a document with the above document
- 2 Join Down-joins a document with the below document
- 3 Move Image Up-moves an image up within a document or into the preceding document
- 4 Move Image Down-move an image down within a document or into the next document
- 5 Split-separates images into two separate documents
- 6 Clear Index Values for this document-deletes all the index data entered in the fields
- 7 Toggle Document/Image Rejection Flag-marks a document for rejection
- 8 Delete Selected Document and all of its images-deletes a document from the batch, including all associated images
- 9 Delete Image-deletes a selected image from a document
- 10 Reverse Document /Image order-reverses the order of documents for the entire batch
- 11 Reverse Image Order in Selected Document-reverses the order of images in a selected document
- 12 Upload Images-allows you to add images to a batch
- 13 Scan Images-provides access to the Web-Based Scanning functions and allows you to scan images into the batch



BATCH ORIGINATOR REPORT





Batch Originator Report

iPERMS Batch Manager

Refresh HotKeys Exit

Batch Stage

Scan/Rescan (148)

Search: Clear Selected Assigned Unassigned

« First « Previous 1 to 25 of 148 batches Next » Last »

Select	Batch Id	Check Out	UICs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment	
<input type="checkbox"/>	18886	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	◇	- / -	Scan Batch 2	2014-09-09 01:17:50	S		2 / 2		GENERATED	Generated by CreateBatches
<input type="checkbox"/>	18887	<input type="button" value="Check Out"/> <input type="button" value="delete"/>	◇	- / -	Scan Batch 3	2014-09-09 01:17:50	S		1 / 1		GENERATED	Generated by CreateBatches

Click on IQC
Reports Menu

Batch Originator Report



iPERMS Batch Manager

Batch Stage

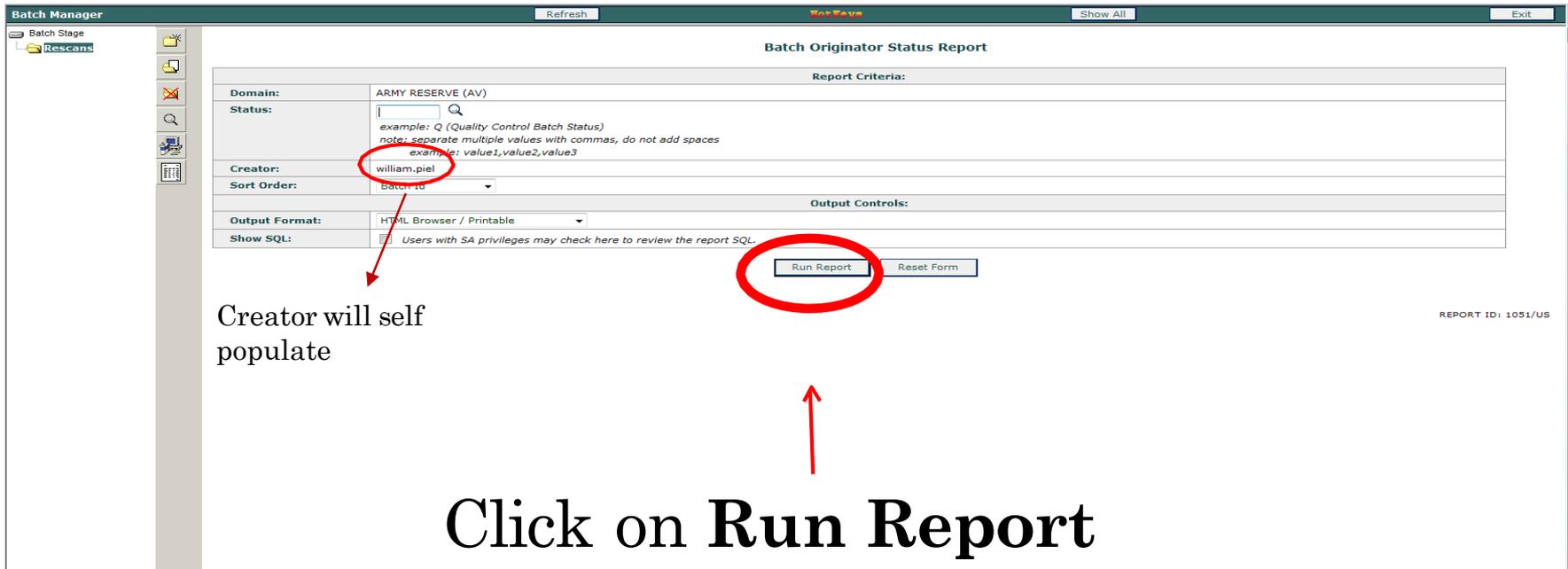
Scan/Rescan (0)

IQC Reports

Batch Originator Report

Batch Case Productivity

Select Batch Originator Report



Batch Manager

Refresh

Hot Keys

Show All

Exit

Batch Stage

Rescans

Batch Originator Status Report

Report Criteria:

Domain: ARMY RESERVE (AV)

Status:

example: Q (Quality Control Batch Status)
note: separate multiple values with commas, do not add spaces
example: value1,value2,value3

Creator: william.piel

Sort Order:

Output Controls:

Output Format: HTML Browser / Printable

Show SQL: Users with SA privileges may check here to review the report SQL.

Run Report

Reset Form

REPORT ID: 1051/US

Creator will self populate

Click on **Run Report**



Batch Originator Report

Batch Originator Status Report
2010-02-05 15:26



Report Criteria
Domain: AV - ARMY RESERVE
Creator: william.piel
Sort Order: Batch ID

Domain	Batch #	Create Date	Creator	Status	Status Description	Status Date	Name	Comment	UICs	Container
AV	960867	2007-01-24 10:31:10	william.piel	Z	INPUT COMPLETE	2007-01-26 18:59:28	-RMS Reindex filed document 12720711	ORDER SEP/ORD SEP 20031216 [MP] AV 480515738 RAMIREZ ROSA MARIA	TEAMD/-	
AV	5587828	2008-02-25 14:03:10	william.piel	Z	INPUT COMPLETE	2008-02-26 09:02:14	New Batch 2008-02-25 12:14	MAJAPL BD MISC-AP	- /-	PROMV
AV	5588006	2008-02-25 14:27:40	william.piel	Z	INPUT COMPLETE	2008-02-26 09:02:32	New Batch 2008-02-25 13:26	CMJAG BD BAILEY AP	- /-	PROMV
AV	5588146	2008-02-25 14:47:54	william.piel	D	DELETED	2008-02-26 12:48:40	New Batch 2008-02-25 13:42	MAJAPL BD CANEDY AP	- /-	PROMV
AV	5588554	2008-02-25 15:43:28	william.piel	Z	INPUT COMPLETE	2008-02-26 11:52:55	New Batch 2008-02-25 14:41	MAJAPL BD SCOTT AP	- /-	PROMV
AV	5589213	2008-02-25 16:18:36	william.piel	Z	INPUT COMPLETE	2008-02-26 13:52:20	New Batch 2008-02-25 15:18	MAJAPL BD BOOTH AP	- /-	PROMV
AV	5589313	2008-02-25 16:35:58	william.piel	Z	INPUT COMPLETE	2008-02-26 13:52:20	New Batch 2008-02-25 15:33	MAJAPL BD STEFFEN AP	- /-	PROMV
AV	5589538	2008-02-25 17:22:11	william.piel	Z	INPUT COMPLETE	2008-02-26 09:02:35	New Batch 2008-02-25 16:21	MAJAPL BD HUNTER AP	- /-	PROMV
AV	5591344	2008-06-11 14:24:30	william.piel	D	DELETED	2008-06-11 15:19:28	New Batch 2008-06-11 13:20	DO NOT INDEX BATCH ART PIEL	- /-	PR TEAM
AV	5591404	2008-06-11 14:23:36	william.piel	D	DELETED	2008-06-11 15:19:28	New Batch 2008-06-11 13:20	DO NOT INDEX BATCH ART PIEL	- /-	PR TEAM
AV	5592198	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	5592958	2008-08-14 11:55:27	william.piel	D	DELETED	2008-08-14 11:55:27	TEST BATCH	HOLD FOR A. PIEL	- /-	
AV	5593036	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	5593089	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	5593210	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	5595208	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	6227198	2008-06-11 14:23:36	william.piel	D	DELETED	2008-06-11 15:19:28	New Batch 2008-06-11 13:20	DO NOT INDEX BATCH ART PIEL	- /-	PR TEAM
AV	6680900	2008-08-14 11:55:27	william.piel	Z	INPUT COMPLETE	2008-09-04 11:55:32	TEST BATCH	HOLD FOR A. PIEL	TEAMA/-	
AV	6682251	2008-08-14 11:55:27	william.piel	D	DELETED	2008-08-14 11:55:27	TEST BATCH	HOLD FOR A. PIEL	- /-	

LEGEND

- S = Rescan Queue - Issue needs to be addressed and sent back to Index/Validation I
- I = Indexing Queue (allow up to 4 weeks to be processed)
- V = Verification Queue - In the verification process
- Q = Quality Control Queue for corrections
- P = Pending release into the AMHRR
- X = Release in progress into the AMHRR
- Y = Final stage of release into the AMHRR
- Z = In the Soldier's Record D = Deleted Batch

RESCAN QUEUE





IMPORTANT!

***Check Rescan Queue
Daily***

- It is your responsibility to manage your batches in the rescan queue
- Every Tuesday all batches remaining in the queue are automatically moved to the index/validation queue for processing

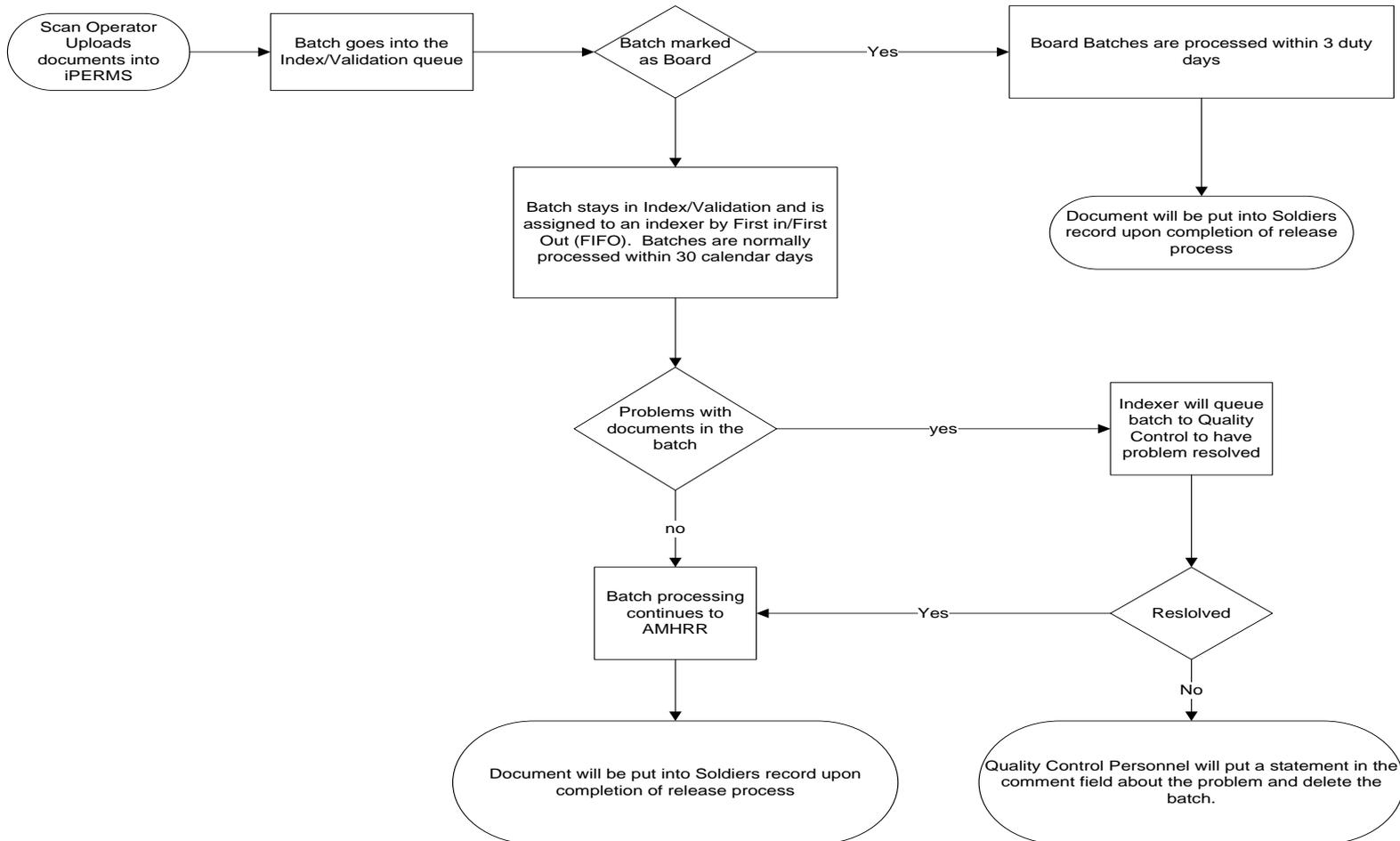


Why are my documents in the Rescan Queue ?

Possible reasons:

- Did not select queue to index/validation in actions drop down box
- A batch was started, saved, waiting for additional documents to be added, and was never sent to index/validation
- Remember, the rescan queue is just a holding area until batch is read

Batch Workflow





Summary

- **DO NOT** scan and upload any documents that contain and/or labeled "Classified" (Secret, Top Secret or Confidential) into iPERMS. The iPERMS system is unclassified. Only unclassified documents are authorized in iPERMS
- You must have the Scan Operator or Field Operator role
- Do not forget the image requirements
- Whenever possible, try to keep your document count between **50-100** per batch
- Do not upload evaluations. Send to the Evaluations Branch (see slide 7 for instructions)
- Queue to Index/Validation
- Access to iPERMS is for the performance of your official duties and the official need to know



ASRB POCs



E mail: iPERMS Access: usarmy.knox.hrc.mbx.iperms-accounts@mail.mil
Records Support: usarmy.knox.hrc.mbx.iperms-board-support@mail.mil
Record Maintenance and Updates(general inquiries):
usarmy.knox.hrc.mbx.perms-records@mail.mil



Mail: U.S. Army Human Resources Command
ATTN: AHRC-PDR-R, Dept 420
1600 Spearhead Division Ave.
Ft. Knox, KY 40122



Web Page: [Army Soldier Records Branch](#)



QUESTIONS?