Line 1: Controlled by: AHRC/PSP/JI
Line 2: Controlled by: iPERMS
Line 3: CUI Category: CTI / OPSEC
Line 4: Distribution / Dissemination Controls: FEDCON
Line 5: POC: Thomas Leto, (502) 613-7319

iPERMS

U.S. ARMY

User Guide

Record Manager Role

How to Use This Guide

The Table of Contents guides the user on where to find specific information. The page numbers are linked to the pages and the user may skip to specific pages by clicking on the number.

Click the question mark icon ( ) in the user guide for more information.

Click the pro tips icon ( )   for helpful tips.

There are a few instances in which the National Guard may have information specific to their system. Click on the ARNG symbol ( )   to view this information.

Table of Contents

DS and CAC Log In

Use the "CAC" login option to complete work as a Record Manager.
The DS Logon option is only for viewing the user's service/retiree record.

Click **I ACCEPT** to denote acknowledgement of the use of government systems and personally identifiable information warning banner. Click on Record Manager role to view records or begin review.

Announcements Page

Upon logging in, you will see general information and announcements as seen in the image below. Check here regularly to see updates to domain or the iPERMS system.

From the Announcements Page the operator may:
See announcements pertinent to the domain and role
Search records and Soldier documents
Initiate a record review
Switch between roles or change preferences

Soldier Record Search

The operator may perform a search for Soldier's records by last name, first name, SSN or by DOD ID number. The type ahead function will offer suggestions based on the characters already entered. Click on the Soldier name, or scroll until the correct name appears to open the record.

Soldier Record Search

The operator may perform a search for Soldier records by running the All Record report. The Soldier Report Criteria (see following page for example) allows the user to filter the report based on several limiting factors. From this, the user can run a report for a single Soldier, up to a large unit of Soldiers. **Soldier Name** will return a Soldiers whose name contains the search criteria. Type the Soldier's name in any combination. Up to 1000 ID numbers can be entered into the SSN/DoD ID field. Additionally, the RM has the option to **SAVE QUERY** so that commonly used report criteria made be utilized quickly and easily. Simply enter criteria and click, **SAVE QUERY**. This will be remembered, and next time used by clicking **LOAD QUERY**.

Soldier Record Search

Click **EDIT** in the Soldier Report Soldier Criteria box to apply filters to the record report

In the dialog, click on **Add Soldier Criteria** to see a dropdown menu with criteria options. Click on an appropriate criteria (for example: Birth Month). The menu will roll up, click again in that same field to be able to choose the month options. See next page.

Soldier Record Search

Soldier Criteria:

🔒 **Attachment UPC (Unit):** ✕
➕ Input UPC(s) 🔍

Add ATTACH_UPC code(s).
*NOTE: Click outside of the dropdown to confirm selections.

➕ add Soldier Criteria 🔍

[Done]

Click in the field next to the plus sign to type specific criteria like UPC. Click the plus sign to add the criteria. Click the blue "X" to remove criteria.

Soldier Criteria

Criteria: |ATTACH_UPC=00CO0|

Soldier Criteria:

🔒 **Attachment UPC (Unit):** ✕
➕ Input UPC(s) 🔍

✕ 00CO0 - literal "00CO0"

➕ add Soldier Criteria 🔍

[Done]

The criteria will show above the dropdown and the dropdown menu will show the UPC options. The operator may choose more than one criteria to continue filtering the report results. Click done to return to the previous page and run report.

Soldier Record Search

The report results will look like this. Notice the red banner, informing the user that there are more results not shown. This is a result of setting the maximum rows too low in the Soldier Search Report on the previous page. Use the blue funnel at the top of the column to filter the report results. Click on the hyperlinked (blue) SSN to open a Soldier record.

Soldier Record Search

986-01-0901 - Soldier Record

	Name	Title	Effective Da...	Input Date	Pages
	APPT ORD/LTR	APPOINTMENT ORDER OR LETTER	1997-12-20	2014-03-17	1
	ASSIGN PERM	ASSIGNMENT - PERMANENT	2009-12-20	2014-03-17	1
[8] ▶	AWD DOC	AWARD	2009-09-21	2014-03-17	1
[2] ▶	DA 1059-1	CIVILIAN INSTITUTION ACADEMIC EVALUATION REPORT	2009-05-09	2014-03-17	1
	DA 3685	JUMPS PAY ELECTION	2013-05-29	2014-03-17	1
	DA 5960	AUTH TO START, STOP, CHANGE BAQ AND OR VHA	2010-01-29	2014-03-17	1
[8] ▶	DA 67-9	US ARMY OFFICER EVALUATION REPORT	2011-02-15	2014-03-17	2
	DA 71	OATH OF OFFICE - MILITARY PERSONNEL	1998-03-28	2014-03-17	1
	DD 93	RECORD OF EMERGENCY DATA	2011-12-08	2014-03-17	2
	DIPLOMA BA BS	BACCALAUREATE DEGREE	1998-05-05	2014-03-17	1
	MS DIPLOMA	MASTER`S DEGREE	2009-05-05	2014-03-17	1
	ORB	4037DA - OFFICER RECORD BRIEF	2014-02-24	2014-04-14	2
	ORD PROMRED	PROMOTION OR REDUCTION ORDERS	2008-09-01	2014-03-17	1
	SF 1199A	DIRECT DEPOSIT	2013-05-29	2014-03-17	1
	SGLV 8286	SERVICEMEN`S GROUP LIFE INSURANCE (SGLI) ELECTION	2011-12-08	2014-03-17	2
[2] ◢	TRNSCPTS	TRANSCRIPT OF CREDIT FOR COLLEGE/UNIVERSITY/TRADE/BUSINESS SCHOOLS	2009-05-05	2014-03-17	1
	TRNSCPTS	TRANSCRIPT OF CREDIT FOR COLLEGE/UNIVERSITY/TRADE/BUSINESS SCHOOLS	1998-05-05	2014-03-17	1

Name AUSTINHANKINS SHOWNET A0109
SSN 986-01-0901
DoD ID No DoD ID found
DOMAIN/UPC AA/01A09
Grade/Rank O4 /MAJ
CMF/MOS - / -
CURORG/ASP 1/1
Birth Date 1978-05-26

IPERMS UID ipermstest.986010901
Last Login Never Logged In
Created 2014-03-17
Documents 32

Search Documents

Most Recent Document

AMHRR
▶ Finance
▶ Deployment/Mob
▶ Performance
▶ Personnel Records Review
▶ Service

Problem Cases (0)

Download

The operator may open any folder or document by clicking on the hyperlinked headings. Narrow the results by clicking on the specific folders on the left-they collapse or expand as you click on the arrow. The operator may also search for specific documents by entering a document name in the search field.

Soldier Record Search

Once you have opened the document, there are viewer tools for use.

Batch Viewer Tools

Icon	Tool
	Export Document
	Print Document
	Document zoom in/out
	Zoom in on a specific spot
	Mobile magnifying glass
	Fit to page, fit to height, fit to width
	Forward/backward image
1 / 1	Skip to page
	Rotate Page
	Document properties
	Thumbnail view of each page
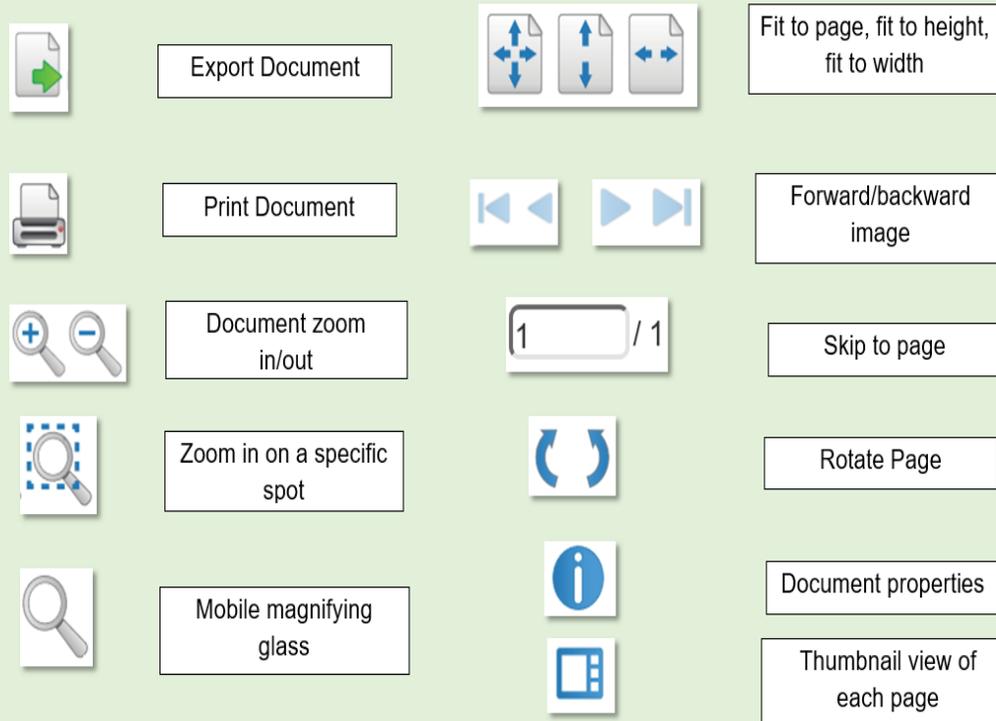
Export Doc- Export a document from the record onto your computer.
Print- Prints the selected doc/image.
Document Zoom- Zoom in or out on the entire image.
Rubber band Zoom- Gives a selection tool and magnifies only the selection.
Magnifier- Gives a mobile, square magnifying glass that will scroll across the image to enlarge portions of the image.
Fit to Page- Enlarges the image to fit the entire window, just the height, or just the width.
Forward/Backward- Toggles forward one page or to the end and backward one page or to the beginning.
Skip to Page- Skips to the specific page.
Rotate Page- Rotates the image to the right or the left in 90 degree increments.
Document Properties- Gives basic information on the doc file type and size.

Soldiers/Document Search

On the records menu bar, click **Documents** to search for documents. This operates very similarly to the Soldier Criteria Report, however there are several more fields that are required to perform this search Note the red asterisks. These are the minimum requirements for this search. In addition, the Soldier Criteria will filter the report to only show the documents of the Soldiers who meet the criteria selected. See pages 7-9 for instructions for operating Soldier Criteria. Either the Soldier Criteria field or the SSN/DOD ID field MUST be filled to run this report. Additionally, the RM has the option to SAVE QUERY so that commonly used report criteria made be utilized quickly and easily. Simply enter search criteria and click, SAVE QUERY. This will be remembered, and next time used by clicking LOAD QUERY.

Soldiers/Document Search

The type ahead function in the Document Name field will offer suggestions based on the typed characters. There can be up to 5 documents selected for searching.

There is an option for setting the sort order for the report results. This is helpful, but not mandatory.

Soldiers/Document Search

Soldier	SSN (Last 4)	DoD ID	Document Name	Effective Date	Input Date
TEST.06065 IPERMS	XXX-XX-6065		DD 93	2005-08-15	2006-01-09
TEST.06064 IPERMS	XXX-XX-6064		DD 93	2008-08-15	2006-01-09
TEST.00613 IPERMS	XXX-XX-0613		DD 93	2008-10-15	2006-01-11
TEST.00551 IPERMS	XXX-XX-0551		DD 93	2008-10-15	2006-01-09
TEST.00549 IPERMS	XXX-XX-0549		DD 93	2009-08-15	2006-01-09
TEST.00549 IPERMS	XXX-XX-0549		DD 93	2012-05-30	2014-05-16
TEST.00549 IPERMS	XXX-XX-0549		DD 93	2013-05-30	2014-05-16
TEST.00549 IPERMS	XXX-XX-0549		DD 93	2014-05-30	2014-05-16

Search Soldiers/Documents

Date of Report: August 13, 2020 3:33:48 PM

Above is an example of a birth month audit, searching for DD 93. The document name is hyperlinked. Click on the link to open the document inside the Soldier's record. The DOD ID is also hyperlinked and will open the Soldier's record. To run another search, click on the yellow Search Soldiers/Documents tab in the upper left corner and the report box will roll down.

DD 93/SGLV Reports

The system creates two types of DD93 reports: Unit Summary and Unit Detail

To the right is the Unit Summary for the Active and Reserve component. This view may change according to the type of access the operator has. Example: A unit-level operator will likely not have visibility of the battalion and above UPC input field.

The operator may run this report without filling the UPC, but it will return all Soldiers in the Army and is a large number of results. It is best to be more specific when running a Unit Summary Report by using the UPC. If the operator has access to more than one UPC, the units can be filtered by inputting only one UPC.

Additionally, the RM has the option to SAVE QUERY so that commonly used report criteria may be utilized quickly and easily. Simply load criteria and click, SAVE QUERY. This will be remembered, and next time used by clicking LOAD QUERY.

DD 93/SGLV Reports

iPERMS | RECORDS ▾ | REVIEWS ▾ | AA | RM

DD93s/SGLVs Unit Summary Report (AA)

Date of Report: May 14, 2020 11:56:08 AM

UPC	Installation	Division/Brig...	Unit Name	Soldiers	Requisite DD93s	SGLV 8286s (SOES)	SGLV 8286s (OTHER)	SGLV 8286s	SGLV 8286As
01A01	FT JACKSON, SC	SCE/01AA	CLASSROOM 01 STUDENT 01	5	5	0	5	5	0
01A02	FT JACKSON, SC	SCE/01AA	CLASSROOM 01 STUDENT 02	5	5	0	5	5	0
01A03	FT JACKSON, SC	SCE/01AA	CLASSROOM 01 STUDENT 03	5	5	0	5	5	0
01A04	FT JACKSON, SC	SCE/01AA	CLASSROOM 01 STUDENT 04	5	5	0	5	5	0
01A05	FT JACKSON, SC	SCE/01AA	CLASSROOM 01 STUDENT 05	5	5	0	5	5	0

These results show number of Soldiers per unit and number of completed DD93s and support forms.
Click on the yellow DD93s/SGLV Unit Summary Report tab to run a new report.

DD 93/SGLV Reports

The Unit Detail Report requires the UPC. The system provides assistance in finding unknown UPCs by clicking on the magnifying glass to the right of the UPC field. The example, to the left, shows the ability to filter the results by clicking on the blue funnel.

If the UPC is known, the RM may free type the characters and click the plus sign next to the field.

DD 93/SGLV Reports

The Unit Detail Report provides more detailed information about each Soldier and when their most recent forms were input into iPERMS. This report can be filtered (blue funnel at the top of the column) and reverse ordered (click on column heading for blue arrow to appear).

Record Review- Review Preparation

Reference Materials
- AR 600-8-104
- Key Supporting Documents Matrix (https://www.hrc.army.mil/asset/16487)
- Required Documents List (https://www.hrc.army.mil/asset/14900)

Helpful Resources
- Technical Support- 502-608-0217 Call for technical system issues with iPERMS
- ASRB- 502-613-9990 Call for records support, expediting record uploads for boards, or access issues

Required Documents to Initiate Review
- Soldier's end of the month LES, Unit Commander's Finance report, Unit Commander's Pay Management Report, or Pay Memo
- Soldier's current Record Brief

Record Review- Review Preparation

Record reviews are an important tool to ensure that all required documents are present in a Soldier's record, as well as ensuring that the supporting documentation for entitlements are reflected there. It is the responsibility of the Record Manager to thoroughly examine all documents within the record for accuracy, clarity, and legitimacy and to inform the Soldier about any documents they may be lacking for a complete record. The Record Review is conducted to validate entries on the Record Brief, specific entitlements on the end of month LES, and ensure substantiating/supporting documents are uploaded in iPERMS.

The record review tool simplifies this process by giving the Record Manager an organized, step-by-step progression to a complete record review for the annual requirement. Record Review folders MUST be viewed in the order that they appear in the Record Review Tool and in this guide in order to properly account for all AMHRR documents.

- Documents in the first five record review folders will be validated using the Soldier's record brief. The documents in the pay entitlements folder must be validated using the end of month LES, UCFR or UCPMR (RC). (See appendix for example)

- As you review each section of the Record Brief, documents in iPERMS should be found in the corresponding Record Review Folder

- Once you have completed the first five Folders associated with the Record Brief, you must review the Pay Entitlements Folder which requires the most current end of month LES or UCFR / UCPMR (USAR/ARNG) and the Key Supporting Documents Matrix.

- The Key Supporting Documents (KSD) matrix is a critical tool for verifying the Pay Entitlements listed on the end of month LES.
  The KSD matrix lists all of the required documents for each entitlement and the record review folder where the documents will be located.

- Where the Record Brief data does not match the data/information found on source documents, data accuracy and reconciliation must occur.

- The Record Brief and LES (or S1 Memorandum for Record) have to be uploaded into the Record Review Tool before the review can be accomplished.

Record Review- Instructions for Conducting the Review

The following slides give instruction on initiating a Record Review using the iPERMS Record Review Tool from the Record Manager's perspective. When possible, the Soldier should ALWAYS be given the opportunity to participate in their annual Record Review. Because they are most knowledgeable about the personal, career, and financial events that have transpired, they are a helpful asset in completing an accurate and complete Record Review.

- Encourage Soldiers to bring any known missing documents, so they may be batched and noted within the review.
- Set aside sufficient time to devote attention to the review, understanding that longer careers=more documents and will require more time.
- Mentor new Soldiers in accessing their own record.
- Ensure that the Soldier is aware that, when conducting a Soldier Independent review, the Soldier knows how to access the review through their own record. (See page 39).
- It is the responsibility of the Record Manager to thoroughly examine all documents within the record for accuracy, clarity, and legitimacy and to inform the Soldier about any documents they may be lacking for a complete record.

Record Review- Initiating a Review

There are three ways for a Record Manager to access the Record Review Tool.
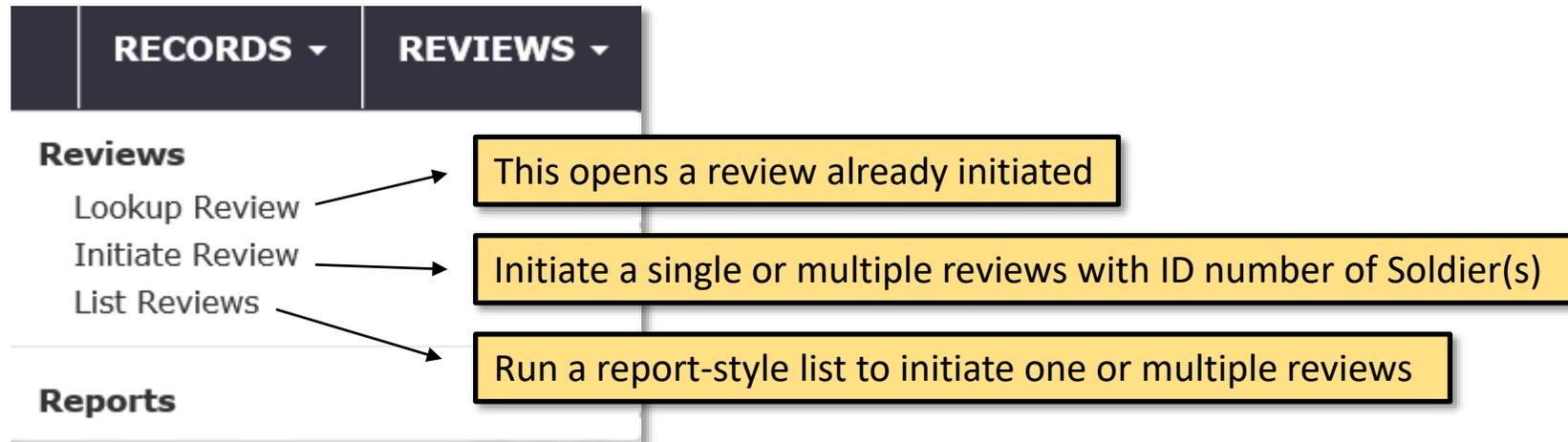
RECORDS ▾   **REVIEWS** ▾

Reviews
Lookup Review → This opens a review already initiated
Initiate Review → Initiate a single or multiple reviews with ID number of Soldier(s)
List Reviews → Run a report-style list to initiate one or multiple reviews

Reports

Record Review- Initiating a Single Review

Click on **Initiate Review** for the box below. After these fields are filled in, click on **Initiate Review.** A message will be sent to the Soldier(s) at their default email or email address listed in the email field with instruction for opening their record review. This method also allows the RM to cancel a review they may have inadvertently initiated.

RECORDS ▾   **REVIEWS** ▾

Reviews
Lookup Review
Initiate Review
List Reviews

Reports

Record Review- Initiating a Single Review

Initiate Record Review

Fields marked with an asterisk (*) are required.

* Soldier SSN/DoD ID:	SSN or Name 🔍 ( ) **SINGLE**
Email Addresses:	Use this field to add email addresses for the notification of the review.
Email Text:	Use this field for informational purposes. Examples include date, time and location of the review. The RM may want to include documents that need to be brought to the review

SSN or Name 🔍 **MULTI** ( )

Initiate Review

Click the radio button here to toggle between single and multiple review initiations

Click **Initiate Review**

Record Review- Initiating a Single Review

The Soldier and RM may choose to conduct the review jointly The system will generate an email to the Soldier informing them of the review. Beginning page 40 is a description of methods of review and how to conduct a Soldier Present review.

Checking Review

Review already exists for XXX-XX-0552

OK
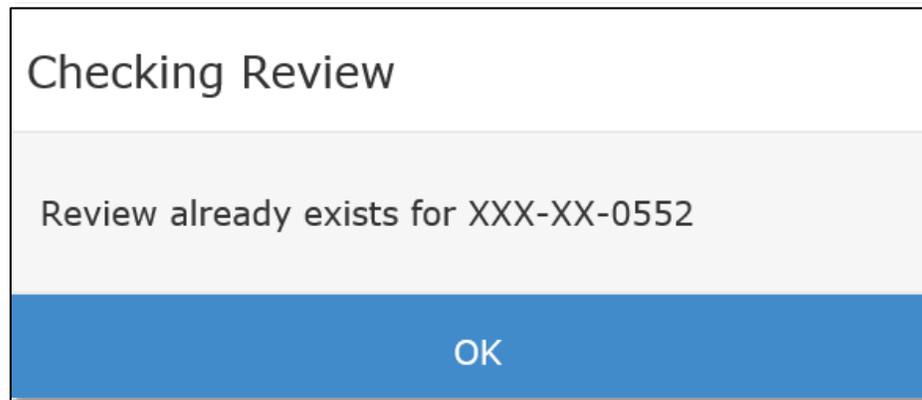
If the operator tries to initiate a review for a Soldier that already has one open, this error message will pop up.

Record Review- Initiating Multiple Reviews

This example shows multiple canceled reviews. An RM cannot cancel reviews that are not assigned to them.

This is the multiple reviews window. The following pages have this view dissected to show each function.

Record Review- Initiating Multiple Reviews

* Soldier SSN/DoD ID:

66600   MULTI

DoD ID	SSN	Name
1515316317 **xxx-xx-0003** TEST.00003 IPERMS
1517882328 **xxx-xx-0004** TEST.00004 IPERMS
xxx-xx-0005 TEST.00005 IPERMS
xxx-xx-0502 TEST.00502 IPERMS
xxx-xx-0504 TEST.00504 IPERMS
xxx-xx-0505 TEST.00505 IPERMS
xxx-xx-0506 TEST.00506 IPERMS
xxx-xx-0508 TEST.00508 IPERMS

* Soldier SSN/DoD ID:

MULTI

666000502,666000505,666000551

Add

SSN/DoD ID	Email List
Default Entries	

The type ahead function will assist in adding either DOD IDs or SSN to compile a list, or the RM may copy and paste a premade list of ID numbers, separating them by commas.
Click **Add** to create the list.

Record Review- Initiating Multiple Reviews

The review list has been created and the RM has several functions to aid the initiating process.

* Soldier SSN/DoD ID:	SSN or Name 🔍 MULTI ⊙

Add

Clear

SSN/DoD ID	Email List	Email Text	Default Email Text	Message	
Default Entries					
xxxxx0502			☑		Remove
xxxxx0505			☑		Remove
xxxxx0551			☑		Remove

The RM can clear the whole list (**Clear**) or remove single ID numbers from the list by clicking the **Remove** buttons.

The RM can send a unique email to one or all of the recipients by clicking the check box in the Default Email Text column. Otherwise, the recipients will receive the system generated email alerting them to log in to begin their review.

Record Review- Initiating Multiple Reviews

		any missing documents and bring documents with you to the review.			
xxxxx0549			☐		Remove
xxxxx0552		Your appointment for your annual Record Review is Friday, July 1st. Please call for your specific time block. Please review your	☑		Remove

Email Addresses:

Email Text:

Your appointment for your annual Record Review is Friday, July 1st. Please call for your specific time block. Please review your record ahead of time for any missing documents and bring documents with you to the review.

Type the unique email into the Email Text field. Note that the unchecked box does not have the unique email text, and will not receive a unique email.

Record Review- Initiating Multiple Reviews

Soldier SSN/DoD ID:

SSN/DoD ID	Email List	Email Text	Default Email Text	Message		
Default Entries						
xxxxx0552			☑	Review already exists for XXX-XX-0552	Remove	
xxxxx0549			☑	Successfully created Review, but no email sent. No recipient provided. (100) for perId: 9584	Remove	Open

The system only allows one open review per Soldier at a time. If a review has already been initiated, the operator will receive the red message above in the message column. The review (Record Review Tool) can be opened from this screen by clicking the **Open** button.

Record Review- List Reviews
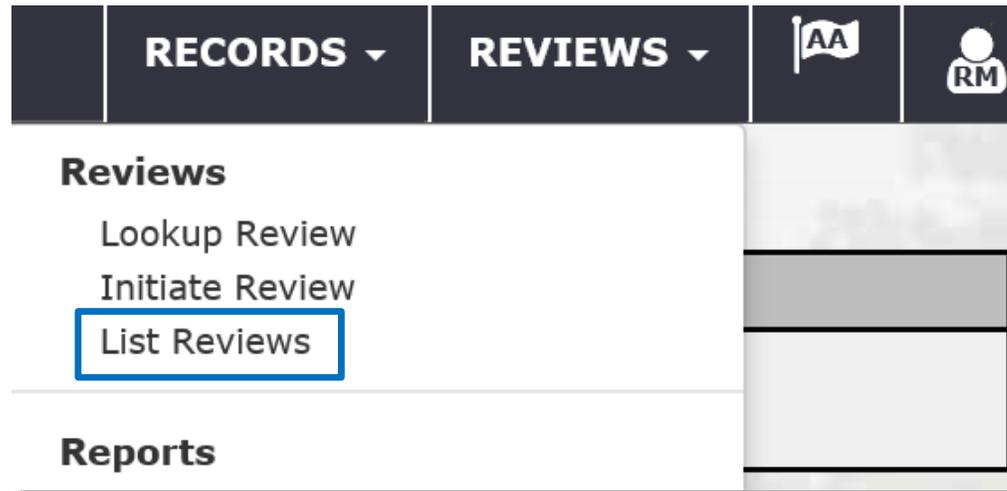
The List Reviews option allows the Record Manager to view, at a unit level, the status of reviews. The report dialog can be run with no criteria to see the status of all Soldiers, or filtered to receive pertinent results. The following pages show the individual functions. See Soldier criteria on pages 8-9 for further instruction on report criteria.

Record Review- List Reviews

Filter the report to include only those Soldiers with review due dates between these two parameters. Use the calendar function or free type.

Filter report results to a specific review status. Example: choose overdue to initiate reviews on all Soldiers in the unit that are overdue.

Record Review- List Reviews

iPERMS

If printing in CSV or XML format, iPERMS will not print a DD Form 2923, Privacy Act Data Cover Sheet. You must attach a DD Form 2923 or DA Label 87, For Official Use Only Cover Sheet. As an option, you can use the HTML Cover Sheet for CSV or XML format.

List Reviews
Fields marked with an asterisk (*) are required.

RESET FORM

*Domain:	AA (AA)
Due Date (FROM):	*example: 2017-02-28*
Due Date (TO):	*example: 2017-02-28*
Review Status:	
Reviewer:	*example: 'JANE DOE' will match 'DOE JANE', 'MARY JANE DOE', 'DOER JANE', etc...*
Soldier Name:	search engine *example: 'JANE DOE' will match 'DOE JANE', 'MARY JANE DOE', 'DOER JANE', etc...*
Soldier Criteria:	Any *Use the Edit button to... These criteria are used... criteria list. Use the pen... ROLLUP_UPC, PUD, DMSL, AND PSC*
SSN/DoD ID List:	*example: '123456789 234567890' or '123-45-6789 234-56-7890'*
Primary Sort Order:	Rank
Secondary Sort Order:	Soldier Name
Maximum Rows:	100 select the maximum number of rows to print on this report. *notice: A high number of rows will be slower and more difficult for your browser to display.*

RUN REPORT

NOTE: This report is not to be used as a strength and accountability management tool. This report is to be used at the unit level to show the current status of Record Reviews for each soldier listed. YYYY-MM-DD is the date of the last completed review and another review is not required at this time. OVERDUE indicates another review IS required because it has been more than a year since the last completed review. IN-PROGRESS indicates a review has been initiated but remains to be completed. OVERDUE/IN-PROGRESS indicates an IN-PROGRESS review that has not been

Reviewer: [search engine]
example: 'JANE DOE' will match 'DOE JANE', 'MARY JANE

Soldier Name: [search engine]
example: 'JANE DOE' will match 'DOE JANE', 'MARY JANE

Filter the report to include only those Soldiers with a specific reviewer. This may be helpful in assuming reviews left incomplete by a departing record manager.

Filter report results to a specific Soldier.

Record Review- List Reviews

The primary and secondary sort order affects the view of the report results. This is optional and can be run without designating either. Set the maximum rows option appropriately so that all expected returns are viewable on the report.

Use the Soldier Criteria option to filter the report to a specific group of Soldiers. See pages 8-9

The SSN/DoD ID list can be used for a list of ID numbers. Be sure to separate by commas, but dashes are not necessary on the SSNs.

Record Review- List Reviews

iPERMS

RECORDS ▾   REVIEWS ▾   CO   RM

List Reviews   Date of Report: May 26, 2020 12:34:49 PM   **Maximum results exceeded, not all rows shown**

Initiate Reviews	UPC	Rank	Soldier Name ↑	SSN (Last 4)	DoD ID	Soldier Signed	Reviewer	Record Review	Due Date
	8AZZZ	LTG	TEST.00801 IPERMS	XXX-XX-0801			joe.p.soldier	IN-PROGRESS	2020-06-21
	8AZZZ	CW3	TEST.00803 IPERMS	XXX-XX-0803			joe.p.soldier	OVERDUE/IN-PROGRESS	2020-06-20
☐	P3AB0	MSG	TEST.03025 IPERMS	XXX-XX-3025				NONE	
☐	P3AB0	SFC	TEST.03026 IPERMS	XXX-XX-3026				NONE	
☐	P3AB0	SFC	TEST.03027 IPERMS	XXX-XX-3027		2020-05-27	joe.p.soldier	2020-05-27	2021-05-27
☐	P3AB0	SFC	TEST.03028 IPERMS	XXX-XX-3028				NONE	
☐	P3AB0	SFC	TEST.03029 IPERMS	XXX-XX-3029		2019-05-20	joe.p.soldier	OVERDUE	2020-05-21
☐	P3AB0	SSG	TEST.03030 IPERMS	XXX-XX-3030				NONE	

This is an easy way to initiate reviews for an entire unit. Notice the first column on the left. The operator may initiate several reviews at once by checking the available boxes. To select all, check the box in the upper left, **Initiate Reviews**. Take care in utilizing this option, to avoid initiating an entire unit, accidentally. The first two rows do not have the option as they have already been initiated and are in progress. The RM may also open or initiate a review from the hyperlink in the Record Review column.

Record Review- List Reviews

Once the operator clicks **Initiate Reviews** the system automatically compiles a multi review initiation as shown on page 29. Unique email text and personal email addresses can be added at this time. Click **Initiate Reviews** to send review invitations to all Soldiers on the list. Carefully check the list before initiating to avoid unintentional review initiations.

Record Review- Look up Reviews

Lookup Review is used to find Soldier reviews that have already been initiated. To begin, type the Soldier's ID number in the SSN/ DoD ID field. The type ahead function will provide suggestions for Soldiers that match the typed characters. Only the ID numbers of initiated Soldiers will appear. Click on the correct Soldier name and click **Open Review.** This will open the Record Review Tool.

RECORDS ▾   **REVIEWS ▾**

Reviews

Lookup Review

Initiate Review

List Reviews

Reports

Lookup Record Review

Fields marked with an asterisk (*) are required.

* Soldier SSN/DoD ID: 66600

DoD ID	SSN	Name

1515316317 **xxx-xx-0003** TEST.00003 IPERMS

1517882328 **xxx-xx-0004** TEST.00004 IPERMS

xxx-xx-0005 TEST.00005 IPERMS

xxx-xx-0502 TEST.00502 IPERMS

xxx-xx-0504 TEST.00504 IPERMS

xxx-xx-0505 TEST.00505 IPERMS

xxx-xx-0506 TEST.00506 IPERMS

xxx-xx-0508 TEST.00508 IPERMS

Open Review

Review Initiation- Soldier Perspective

1. If the Soldier is not at the same workstation to complete the review, the Soldier will need to go to https://iperms.hrc.army.mil and log into their own record to complete the review.
2. The view below is the Soldier's home page. Select the **Reviews** tab.
3. Click on **Open** in Action column on right side of page. If the Open button does not appear, contact your Record Manager (S1/Unit Administrator) to have a review initiated.
4. Upload Record Brief and end of month LES (the RM must initiate the review before the Soldier can upload documents see page 43). The Record Manager must verify the attachments before the Soldier can sign the review.
5. Click on the **Documents** Tab on top of page.
6. Soldiers can add comments or remarks for their Record Manager in the Soldier Comments box in the Soldier/Reviewer Comments Tab located at the bottom of the Review. (See page 52)
7. Once the Soldier has reviewed every document, made any necessary comments, *listed any missing documents*, and signed the review, the Record Manager will receive an email from iPERMS indicating the review is ready for the Record Manager to complete the Record Manager portion of the review.

UNCLASSIFIED//FOR OFFICIAL USE ONLY

iPERMS

| Announcements (3) | Documents | Reviews | Help | FAQ | Preferences |

Type	Status	Due Date	Action
PERSONNEL RECORDS REVIEW	IN-PROGRESS	2019-07-28	Open

Methods of Reviews

Soldier Present- (Preferred Method) This method allows the Record Manager and the Soldier utilize the same workstation to conduct the review. In this instance, the RM and the Soldier must use different browsers (Chrome, Firefox, Edge) while conducting the review. If the RM and the Soldier utilize separate workstations, they will still be able to view the review at the same time. Soldier Present method is preferred as it ensures that both parties in the review are viewing the same documents and promotes helpful dialogue about the Soldier's record. When conducted in this manner, both the Soldier and RM are credited with viewing the documents and can sign one after the other (Soldier must sign first). This saves lag time that often occurs when the RM and Soldier conduct the review separately.

Soldier Independent- This review can be either in separate locations or at the same location, but separate workstations. This method is often utilized when the Soldier does not have the ability to meet with the Record Manager. This method is an acceptable alternative to the Soldier Present method.

Soldier Unavailable- (only acceptable in a few instances) The Soldier Unavailable review is designated at the end of a Soldier Independent Review. There is a check box on the signature page for the RM to indicate that the review is being completed Soldier Unavailable. Completing the review as Soldier Unavailable is intended to be used in cases where the Soldier is hospitalized, incarcerated, AWOL or other extreme circumstance. This must not be used to expedite the review process for the purpose of meeting a suspense. In this review, the Soldier does not view or sign, thus has no involvement in the review. See page 58.

Conducting the Review

1. The Record Review is conducted to validate entries on the Record Brief, specific Entitlements on the end of month LES, and ensure substantiating/supporting documents are uploaded in iPERMS.

2. The first five folders in the Record Review align with sections on the Record Brief.
   The sixth folder (Pay Entitlements) aligns with the Entitlements on the LES.

3. As you review each section of the Record Brief, documents in iPERMS should be found in the corresponding Record Review Folder.

4. Documents that are determined to be missing must be listed in either the temporarily or permanently missing documents box in the Record Review Tool.

5. Once you have completed the first five Folders associated with the Record Brief, you must review the Pay Entitlements Folder which requires the most current end of month LES or UCFR / UCPMR (USAR/ARNG) and the Key Supporting Documents Matrix (https://www.hrc.army.mil/asset/16487).

6. Reviews must be conducted in the order the folders are listed on the review. Starting with the Assignment/Deployment folder and finishing with the Pay Entitlements folder. See Appendix A for record review folder and LES/SRB alignment.

7. Record Manager/Soldier must check "Show # previously reviewed documents" before starting the review. This will assist in verifying the documents that have been merged from the old Finance Record Review to the new Pay Entitlements Folder.   If the "Show # previously reviewed documents" is not checked, it is not possible to ensure data accuracy on the Record Brief. See page 48.
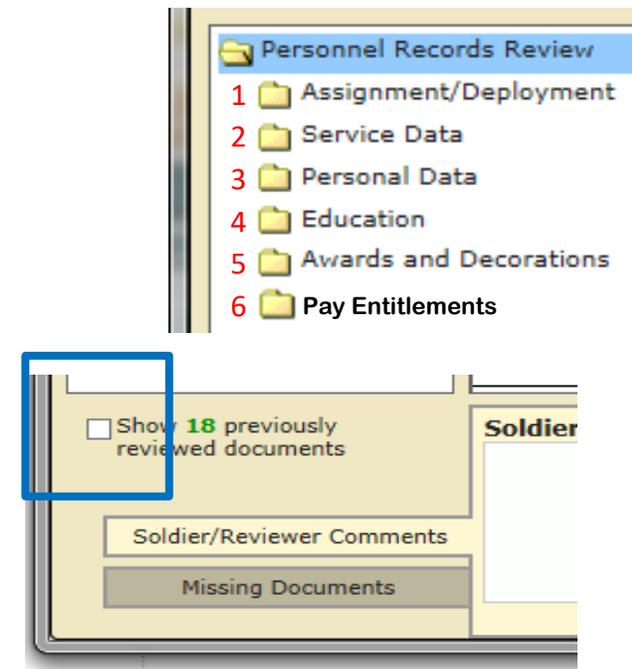
Conducting the Review- LES and SRB

Record Manager View

Soldier View

Soldier Present Chosen

In order to proceed past the landing page of the RRT (Review Details tab) the RM or the Soldier must upload the current Soldier Record Brief (SRB) and the end of the month Leave and Earnings Statement (LES). This LES has all deductions and entitlements listed and, therefore, necessary to validate pay records within iPERMS.

This view is of a Soldier choosing a joint review by clicking **Soldier is Present** which exists on the Soldier side of the review. The Soldier must validate with their CAC to continue this way.

Conducting the Review- LES and SRB

If **Soldier is Present** is chosen, and the digital signature of Soldier is validated, the RM and Soldier will be able to view documents jointly. The RM or the Soldier must now proceed with the SRB and LES upload to continue. The SRB and LES must be saved locally as PDF files in order to upload into iPERMS. If these are uploaded by the Soldier, they must be validated by the RM before the documents tab can be accessed.

The operator may drag and drop files on top of the **Select** button, or by clicking **Select** and browsing for files within the computer.

Soldier Uploaded Documents (Soldier can only upload documents once the RM has initiated the review)

Record Manager Uploaded Documents Note: The verified box is checked. Unchecking this will require the documents to be uploaded again

Important: The RM and the Soldier must click on SAVE and REFRESH in the top right corner of the screen after each action in order for the other party to view the updates.

Documents need validation from RM

Has been validated and review can proceed

Incorrect file type error. Must use .pdf

Conducting the Review

This is the view from the Documents tab and the focus of the record review. The review tool has an auto save option so that the RM can come back to the review in the same place, even if the server shuts down unexpectedly. These are the folders that the RM has access to for the record review. Double click on the individual folders to show only those documents in that specific folder.

Conducting the Review

Record Review Tool

TEST.06264 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-6264

Review Details | Documents | Signatures | Problem Cases (0) | Report Problem | Autosaved | Refresh

- ◢ Personnel Records Review
  - 📁 Service Data
  - 📁 Personal Data
  - 📁 Historical Reviews

Document Name	Document Title	Effective Date	Soldier Reviewed	RM Verified	Reviewer Document Comments
DA 71	OATH OF OFFICE - MILITARY PERSONNEL	2003-08-08	☐	☐	
DA 1059-1	CIVILIAN INSTITUTION ACADEMIC EVALUATION REPORT	2003-09-08	☐	☐	
DA 1059-1	CIVILIAN INSTITUTION ACADEMIC EVALUATION REPORT	2003-08-08	☐	☐	
DA 1059	SERVICE SCHOOL ACADEMIC EVALUATION REPORT	2003-08-08	☐	☐	
FIN REC REV	FINANCE RECORDS REVIEW	2014-01-23	☐	☐	
FIN REC REV	FINANCE RECORDS REVIEW	2014-01-29	☐	☐	

☐ Show **0** previously reviewed documents

Soldier/Reviewer Comment

Soldier Comments

Reviewer Comments

By default, the Record Review Tool (RRT) will show only the documents uploaded since the last review. Click here to show ALL documents. All documents will be visible and the RM will be able to ensure that all documents that should be in the record are present, legible, signed, etc. The comment boxes at the bottom are provided for continuity of information

Conducting the Review

This view is a Soldier Independent Review

This view is conducted Soldier Present. Note the check boxes under the Soldier Reviewed and the RM Verified columns are showing viewed Simultaneously.

Conducting the Review

	Review Details	Documents	Signatures
45-67-9801			
Document Name	**Document Title** ↓		
SGLV 8286	SERVICEMEN`S GROUP LIFE INSURANCE (SGLI) ELECTION		
SGLV 8286	SERVICEMEN`S GROUP LIFE INSURANCE (SGLI) ELECTION		
FIN REC REV	FINANCE RECORDS REVIEW		

The blue arrow allows the RM to order any of the columns. Notice the Document Title has a blue arrow next to it. This is invisible until you click on the title. The blue arrow will reverse the order from alphabetical once clicked. Effective date defaults to the oldest effective date document first, however the blue arrow can reverse this order.

Conducting the Review

Begin viewing the Soldier's documents in the record in the order that the folders appear. See Appendix A for alignment of record review folders and LES/SRB
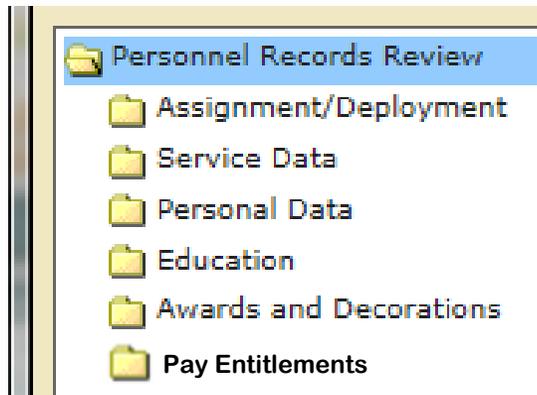
Personnel Records Review
- Assignment/Deployment
- Service Data
- Personal Data
- Education
- Awards and Decorations
- **Pay Entitlements**

Record Review Tool

PERSONNEL RECORDS REVIEW | xxx-xx-   Review Details   Documents   Signatures   Problem Cases (6)   Report Problem   Saved   Refresh

Missing Initial Contractual Documents

Personnel Records Review	Document Name	Document Title	Effective Date	Soldier Reviewed	DD 93 Reviewed	RM Verified	Reviewer Document Comments
Personal Data	DD 93	RECORD OF EMERGENCY DATA	2020-10-01	☑ 2021-12-20	DD 93 Accurate ▾	☑ 2021-12-20	▾
Historical Reviews	PERS REC REV	PERSONNEL RECORDS REVIEW	2021-12-16	☑ 2021-12-20		☑ 2021-12-20	▾

According to MILPER message 21-231, the Soldier must validate their DD 93 document, annually. In the review, the Soldier must attest to the document being accurate or update needed. The RM will not be able to update the DD 93 drop down.

Conducting the Review

Record Review Tool

TEST.06263 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-6263

Review Details | Documents | Signatures | Problem Cases (0) | Report Problem | Autosaved | Refresh

Personnel Records Review
- Assignment/Deployment
- Service Data
- Personal Data
- Education
- Awards and Decorations
- Pay Entitlements

Show **0** previously reviewed documents

Document Name	Document Title	Effective Date	Soldier Reviewed	RM Verified	Reviewer Document Comments
DA 71	OATH OF OFFICE - MILITARY PERSONNEL	2003-08-08	☑ 2020-07-30	☑ 2020-07-30	
DA 1059-1	CIVILIAN INSTITUTION ACADEMIC EVALUATION REPORT	2003-09-08	☑ 2020-07-30	☑ 2020-07-30	
DA 1059-1	CIVILIAN INSTITUTION ACADEMIC EVALUATION REPORT	2003-08-08	☑ 2020-07-30	☑ 2020-07-30	
DA 1059	SERVICE SCHOOL ACADEMIC EVALUATION REPORT	2003-10-08	☑ 2020-07-30	☑ 2020-07-30	
					DUPLICATE
DA 1059	SERVICE SCHOOL ACADEMIC EVALUATION REPORT	2003-09-08	☑ 2020-07-30	☑ 2020-07-30	INVERTED
DA 1059	SERVICE SCHOOL ACADEMIC EVALUATION REPORT	2003-08-08	☑ 2020-07-30	☑ 2020-07-30	MISFILED - DOCUMENT NAME/DATE INCORRECT
FIN REC REV	FINANCE RECORDS REVIEW	2014-03-24	☑ 2020-07-30	☑ 2020-07-30	MISFILED - DOES NOT BELONG TO SOLDIER
FIN REC RE			☑ 2020-07-30	☑ 2020-07-30	

There are often problems in a Soldier's record. It is crucial to take the time to carefully view each document and record any issues. The following page gives step-by-step instructions for recording document issues in a record review.

Conducting the Review

Reviewer Document Comments box has standard options to describe the issue. If none of those cover the description, the RM can freely type a short description in the box.

The document issues listed in the dropdown, when chosen, will create a prepopulated dialog for a problem case (ex. Duplicate Document) This dialog will have all of the pertinent information required to send a problem case to the HR Specialist at HRC. It may be appropriate to add more details as necessary to the dialog and sufficient characters are allowed for this. See page 63 for how to create a problem case.

Soldier Reviewed	RM Verified	Reviewer Document Comments
☑ 2020-02-28	☑ 2020-07-30	illegible copy ▼

Soldier Reviewed	RM Verified	Reviewer Document Comments
☑ 2020-02-28	☑ 2020-07-30	DUPLICATE ✕ ▼

DUPLICATE
INVERTED
MISFILED - DOCUMENT
NAME/DATE INCORRECT
MISFILED - DOES NOT BELONG
TO SOLDIER

Conducting the Review

Choosing a document issue from the dropdown will cause a prepopulated problem case dialog to automatically pop up. The RM must fill in the action requested (required) and click **Create Case.** The RM must click Create Case or the problem will not be submitted. New case numbers will be recorded on the PDF that is signed at the end of the review. See page 65 for more information on creating a problem case.

Conducting the Review

Duplicate- There is an exact copy of the same document within the record. If one copy is more legible than another, keep the most legible and create a problem case for the other copy.

Inverted- This document is turned. It will need to be corrected by an HR Specialist at HRC.

Misfiled-Document Name/Date Incorrect- This document was incorrectly indexed and will need to be corrected by an HR Specialist.

Misfiled-Does Not Belong to Soldier- This document was associated to a name or SSN/ DoD ID number incorrectly and will need to be corrected by an HR Specialist.

Utilizing these dropdowns and subsequent automatic problem case dialogs are an important part of record auditing.

Conducting the Review

The final requirement in recording document issues is to list the document issues in the Reviewer Comments section. This is required in order to sign the review. The following page gives examples of the comments sections.

Reviewer Comments

Need to create Problem Case to remove Birth Certificate
Need to create Problem Case for removal of duplicate Award
Need to work with Soldier to upload DA 638 for Award 2000-01-10

Conducting the Review

Soldier/Reviewer Comment

Soldier Comments
The birth certificate does not belong to me or my dependents

Soldier may comment pertinent information about their observation of the documents in their record.

Reviewer Comments

RM may comment on record, or comment that items have been batched to the record.
RM required to list any document issues here.

Missing Documents

Toggle between the two bars to access the comment boxes

Soldier/Reviewer Comment

Missing Documents

Permanently Missing
DA 4187 - Promotion from E1 to E2 missing

RM required to list any documents that should be in the record, but cannot be produced within 60 days. This information will carry over into subsequent reviews

Temporarily Missing
Need birth certificate for dependent child

List document here that will be batched before 60 days.
ANY LISTING HERE WILL PREVENT SIGNING AND COMPLETION OF REVIEW

Conducting the Review-Completing the Review

Record Review Tool

TEST.00801 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-0801

Review Details   Documents   Signatures   Problem Cases (0)   Report Problem

Completion Date:
Review Method: SOLDIER PRESENT

Soldier Unavailable: ☐

Soldier Signature

All comments made in this review will be recorded and a copy filed in your AMHRR. Please ensure all comments are professional and relevant to this review and your record.

Sign Review

Reviewer Signature

The following need to be addressed before signing:
1. Soldier signature required before a reviewer can sign a review.
2. No comment specified for X marked document error has been noted in the Reviewer Document Comments in the Documents Tab.
3. When documents are marked with an X, the Reviewer must select the error type on the Signatures tab and enter text in the "Reviewer Comments" box on the Documents tab.

If the Soldier is physically unable to complete the review, the RM must:
- Mark "Soldier Unavailable" above
- Note an appropriate "Soldier Unavailable" reason from the drop-down list above
- Provide additional explanation (required if choosing "OTHER")

This is the signature page. From here the RM can designate this as a Soldier Unavailable review (if appropriate) and sign the review.

Conducting the Review-Completing the Review

Record Review Tool   □ ×

TEST.06385 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-6385

Review Details   Documents   Signatures   Problem Cases (0)   Report Problem   Save   Refresh

Completion Date:
Review Method:INDEPENDENT

Soldier Unavailable: ☑   Explanation:

OTHER - OTHER R... ▾

DEPLOYED - SOLDIER IS DEPLOYED
HOSPITALIZED - SOLDIER IS HOSPITALIZED
TRANS - SOLDIER IS ON TRANSITION LEAVE
AWOL - SOLDIER IS AWOL
OTHER - OTHER REASON (DESCRIPTION REQUIRED)

R...

The following need to be
1. Explanation requir

If the Soldier is physical
must:
- Mark "Soldier Unavailable" above
- Note an appropriate "Soldier Unavailable" reason from the drop-down list above
- Provide additional explanation (required if choosing "OTHER")

To choose Soldier Unavailable, click the checkbox to the left and choose a reason from the dropdown. If none of the choices accurately describe, choose other and provide a description. The Soldier signature block will disappear.

Conducting the Review-Completing the Review

Record Review Tool

TEST.06385 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-6385

Review Details   Documents   Signatures   Problem Cases (0)   Report Problem   Save   Refresh

Completion Date:
Review Method: INDEPENDENT

Soldier Unavailable: ☑   Explanation:

OTHER - OTHER R... ▼

Notice

IAW DA Pam 600-8-104, 4-4c. "Soldier Unavailable for Signature" should be used in extreme circumstances only. RMs can conduct the reviews without the Soldier if they are unavailable for an extended period of time. This is not the preferred method for conducting reviews. Selecting this option requires the RM to document the reason for conducting the review without the Soldier and is not to be used as a result of poor planning. For example, this may be appropriate if the Soldier is in a deployed environment with limited computer access.

OK

The following need t
1. Explanation re

If the Soldier is phys
must:
• Mark "Soldier l
• Note an appro
  drop-down list
• Provide additio

The Record Manager's participation is integral during the
4 Phases of the PRR process:
1.   Prepare for a Record Review
2.   Conduct a Record Review
3.   Cleanse the Record (Problem Resolution (PR) cases))
4.   Execute the Record Audit (Update record briefs, PR Case follow up)
It is very important to conduct record reviews with the Soldier's participation and conducting reviews with the Soldier Unavailable should only occur in rare instances. RMs will see the below pop up message when checking the Soldier Unavailable option.

Conducting the Review-Completing the Review

Record Review Tool

TEST.00801 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-0801

Review Details Documents Signatures Problem Cases (0) Report Problem

Completion Date:
Review Method:SOLDIER PRESENT

Soldier Unavailable: ☐

Soldier Signature

All comments made in this review will be recorded and a copy filed in your AMHRR. Please ensure all comments are professional and relevant to this review and your record.

Sign Review

Reviewer Signature

The following need to be addressed before signing:
1. Soldier signature required before a reviewer can sign a review.
2. No comment specified for X marked document error has been noted in the Reviewer Document Comments in the Documents Tab.
3. When documents are marked with an X, the Reviewer must select the error type on the Signatures tab and enter text in the "Reviewer Comments" box on the

...hysically unable to complete the review, the RM must:
...er Unavailable" above
...ropriate "Soldier Unavailable" reason from the drop-down list above
...tional explanation (required if choosing "OTHER")

The reviewer block will always be yellow, at this point, as the Soldier must sign first. Once the Soldier has clicked **Sign Review** to authorize and provide digital signature, the reviewer should be able to digitally sign. If the reviewer block is still yellow, read the list within it. This block will give you instructions on the issues that need to be remedied before the reviewer can sign.

Conducting the Review- Signatures
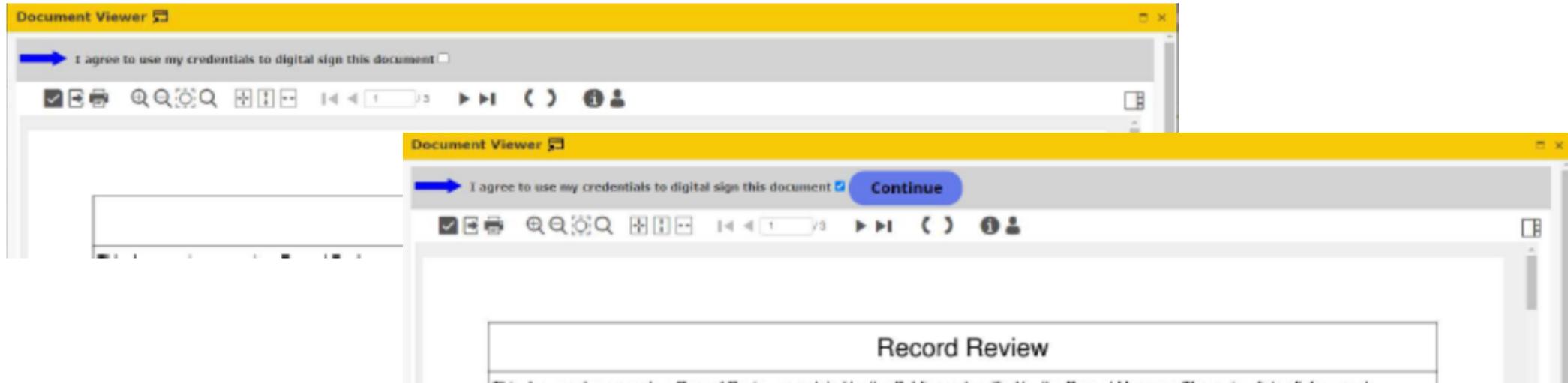
The Soldier or Record Manager clicks the box next to: "I agree to use my credentials to digital sign this document" and will then click the Continue button

Conducting the Review
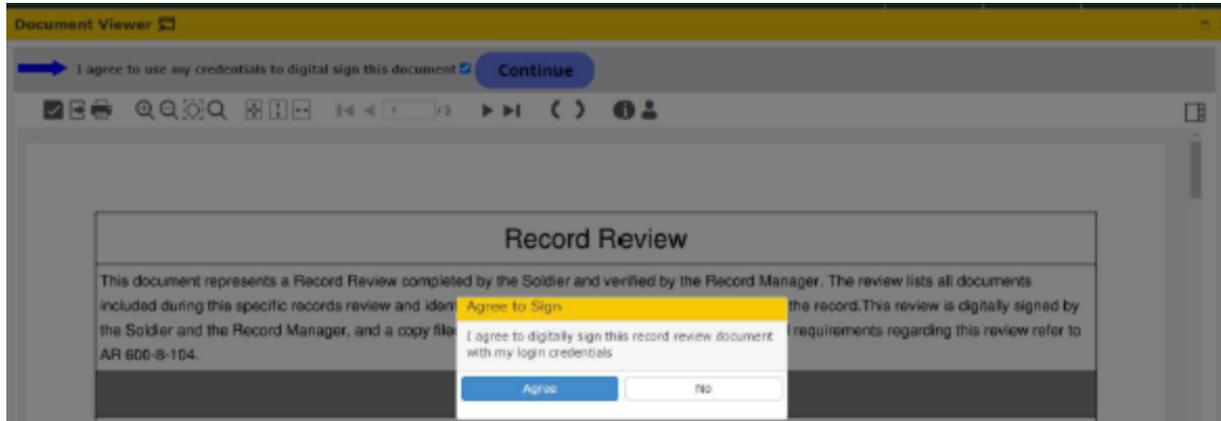
Select "Agree" to digitally sign the record review.
The window will automatically close and update the record review tool.

Document Viewer

I agree to use my credentials to digital sign this document ☑ **Continue**

Record Review

This document represents a Record Review completed by the Soldier and verified by the Record Manager. The review lists all documents included during this specific records review and iden[...] the record. This review is digitally signed by the Soldier and the Record Manager, and a copy file[...] requirements regarding this review refer to AR 600-8-104.

Agree to Sign

I agree to digitally sign this record review document with my login credentials

Agree | No

Record Review Tool

TEST.06264 IPERMS
PERSONNEL RECORDS REVIEW | 666-00-6264

Review Details Documents **Signatures**

Completion Date:
Review Method: SOLDIER PRESENT

Soldier Unavailable: ☐

Review Complete

The Review Completion document will be visible in the Soldier's record shortly.

Review is complete and cannot be edited.

Once both parties have signed the review successfully, the Record Review is now Complete. The Review is no longer editable and is immediately filed in the Historical Reviews sub-folder contained within the Personnel Record Review folder in the Soldier's Record."
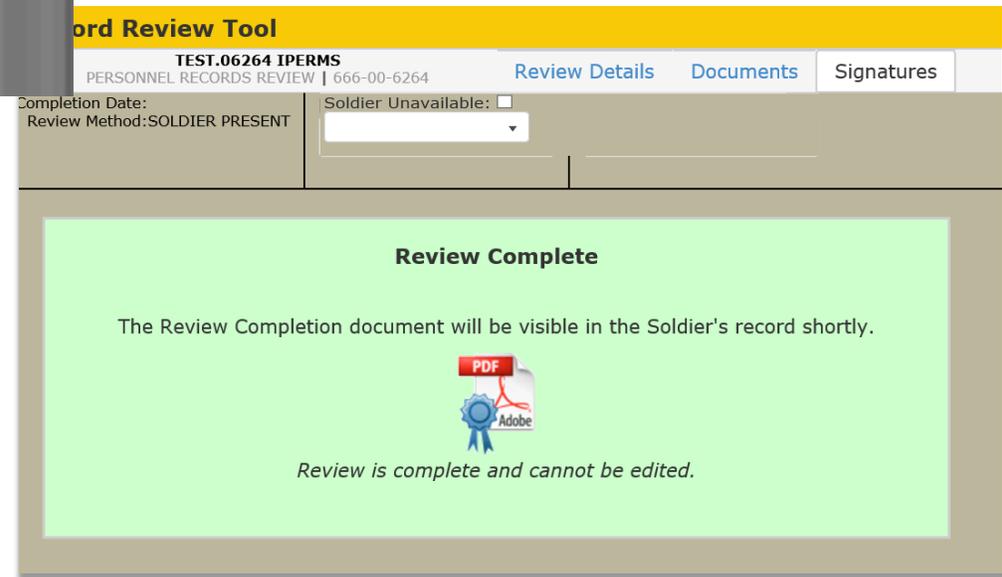
Record Review Reports

The **Reports** menu is within the **REVIEWS** tab. There are several levels of reports that can give the RM information about the status of record reviews in their unit. The RM's ability to view these reports will depend on their access level. A company level Record Manager will not have access to a Command or Installation Summary.

RECORDS ▾   REVIEWS ▾

Reviews

Reports

Command Summary
Installation Summary
Unit Summary
Unit Detail
Unit Completion Summary
Unit Completion Detail

Record Review Command Summary Report (AA)

RESET FORM

Major Command:
Select MAJCOM(s)...
example: FC (US ARMY FORCES COMMAND)
note: select one or more items from dropdown list

DML (Division):
DML...
example: 4ID (4TH INFANTRY DIVISION)
note: select one or more items from dropdown list

DMSL (Brigade):
Select DMSL(s)...
example: 14I (1ST BRIGADE COMBAT TEAM, 4TH INFANTRY DIVISION)
note: select one or more items from dropdown list

PSC (Brigade):
Select PSC(s)...
example: UA95 (1ST BDE, 4TH ID, FT CARSON, CO)
note: select one or more items from dropdown list

RUN REPORT

The RM can run a report on the entire area of their access by not entering any information in these fields, or narrow the field by selecting a specific Command, DML, DMSL, or PSC. Click **RUN REPORT** for results.

Record Review Reports

Record Review Unit Summary Report (AA)   Date of Report: June 21, 2019 9:39:17 AM

UPC	Installation	Division/...	Unit Name	Soldiers	COMPLETE	IN-PROGRESS (NOT DUE)	% COMPLETE	IN-PROGRESS (INITIAL)	OVERDUE/IN-PROGRESS	OVERDUE	NONE
00101	FT MEADE, MD	AIC/MD13	704 MI BDE HHC	2	0	0	0%	0	0	0	2
00103	FT MEADE, MD	AIC/MD13	741ST MI BN CSG SOCOM	1	0	0	0%	0	0	0	1
00112	FT MEADE, MD	AIC/MD13	741 MI BN CO A	4	0	0	0%	0	0	0	4
00113	FT MEADE, MD	AIC/MD13	741 MI BN CO B	4	0	0	0%	0	0	0	4
00114	FT MEADE, MD	AIC/MD13	741 MI BN CO C	1	0	0	0%	0	0	0	1
00117	FT MEADE, MD	AIC/MD13	741 MI BN STUDENT NSA	1	0	0	0%	0	0	0	1
00131	FT MEADE, MD	AIC/MD13	742 MI BN	1	0	0	0%	0	0	0	1
				Total: 13714	Total: 18	Total: 14		Total: 12	Total: 208	Total: 40	Total: 13422

1 2 3 4 5 6 7 8 9 10 ...   Showing 3532 rows

With this report, the RM can easily see the status of the entire unit in terms of completion percentages. The UPC is hyperlinked so that the RM may click on each UPC and open the Unit Detail Report and view the individual Soldiers. RMs will see report results in the Unit Detail Report for those Soldier's that they are allowed to see based on their permissions

Record Review Reports

UPC	Rank	Soldier Name	SSN (Last 4)	Record Review	Temporarily Missing	Permanently Missing	Reviewer Comment
				Record Review Unit Detail Report (AA)		Date of Report: June 9, 2020 10:29:32 AM	
01A02	MAJ	AUSTINHANKINS SHOWNET A0102	XXX-XX-0201	2020-06-09		Marriage certificate dependent birth certificate	
01A02	SFC	PALUMBO CORY A0102	XXX-XX-0203	NONE			
01A02	SFC	LEONARD JON A0102	XXX-XX-0204	NONE			
01A02	SFC	HANDY CHRISTOPHER A0102	XXX-XX-0205	NONE			
01A02	W03	STURGIS RODRICUS A0102	XXX-XX-0202	NONE			

The Unit Detail Report shows detailed information about the individual Soldier's record review status. The RM can also open the Record Review Tool from the hyperlink in the Record Review column.

Record Review Reports

The Unit Completion Summary Report will only show information about the completed reviews in the unit. The RM can see how many reviews were completed by which method. Open a Unit Completion Detail Report by clicking on the hyperlink or by clicking on the Reviews tab on the menu bar, then Reports, and finally Unit Completion Detail.

Record Review Reports

Record Review Unit Completion Detail Report (AA)

Date of Report: June 9, 2020 10:53:12 AM

UPC	Rank	Soldier Name	SSN (Last 4)	Completion Type	Permanently Missing	Reviewer User ID	Reviewer Comment
01A02	MAJ	AUSTINHANKINS SHOWNET A0102	XXX-XX-0201	JOINT	Marriage certificate dependent birth certificate	John.q.soldier2	

The Unit Completion Detail Report will only show information about the individual completed reviews in the unit. The RM can see the method of review, any permanently missing documents, reviewer and review comments.

Report a Problem

The following are some guidelines for creating problem cases.

- Do not submit problem cases for missing or illegible documents. iPERMS does not have the capability to produce any documents. Instead, have the Soldier produce the document and upload it into a batch. A duplicate document case will be made for the illegible document.

- Do not submit problem cases for technical issues with iPERMS. If you are having technical difficulty call 502-608-0217.

- Do not submit problem cases for Soldier within their board window for board purposes. These issues are time sensitive. Instead, call 502-613-9990, option 2 for assistance.

- Be specific in the description of the document problem.

- Keep a record of the problem case number for future reference.

- The Record Manager may put up to 5 document problems into one problem case. Be sure to put only one Soldier per case.

Report a Problem

There are several locations that the RM can initiate a problem case. There are two locations for reporting a problem that provide a prepopulated dialog. The first is within the Soldier's record. Once the record is opened there is the Report a Problem button on the left side of the screen. As shown, the problem case dialog is automatically filled with the pertinent information. It only lacks the justification and the solution.

Once all information has been filled in, click **Create Case** on the bottom and record the subsequent problem case number.

Report a Problem

Report a Problem

All fields are required.

Type of Problem:	Comment
Description:	Soldier: 999005374 Document: DA 5960 Input Date: 2017-06-21 Effective Date: 2016-04-05
SSN or DodID:	999005374
Your Email:	john.q.soldier2.mil@mail.mil
Report to Domain:	AA

Create Case

Document Viewer

Document Details

Doc Title	AUTH TO START, STOP, CHANGE BAQ AND OR VHA
Effective	2016-04-05
Input	2017-06-21
Pages	1

Report a Problem (i)

g: 3914

Report a Problem

Other locations include the Record Manager landing page under the **RECORDS** tab on the menu bar and an option on each page of the Record Review Tool. They all operate the same way. The dialog is blank and will need to have all information filled in.

Appendix A- Alignment for LES/SRB and Review Folders

ASSIGNMENT/DEPLOYMENT

Leave and Earnings Statement (LES)

Documents in this Folder support the following Pay Entitlements on the LES

- Base Pay (GRADE, YRS SERVICE)
- BAH (Current PCS Orders)
- Hazardous Duty Pay
- Family Separation
- Imminent Danger Pay
- Aviation Pay (Officers)

Record Brief

Section I
- Validate each OS/Deployment Combat Duty in Section I has a corresponding order
- Validate orders listing any Enlisted MOS Changes, Officer Branch, ASIs, SQIs

Section IX
- Ensure all assignments listed in Section IX have a corresponding **Assignment Order** in the Record.

For Officers/Warrant Officers, see Slide 14 for a screenshot of the ORB sections

Appendix A- Alignment for LES/SRB and Review Folders

Leave and Earnings Statement (LES)

Documents in this Folder support the Pay Entitlements on the LES
- Base Pay (GRADE, YRS SERVICE)
- BAH (Current PCS Orders)

Record Brief

Section III
- Validate Date of Rank is correct based on promotion orders for each rank (SGT and higher for Enlisted Soldiers)
- Account for Time in Service by validating all enlistment / reenlistment contracts and separation documents (if there was a break in service) are in iPERMS.
- Documents that can account for time include but are not limited to:

Officers:	Enlisted:
Oath of Office	DD Form 4-1/2 and/or DD Form 4-3
Appointment letter/order	- DD Form 1966
All promotion orders	All promotion orders to E-5 and above
Commissioned via USMA: USMA 5-50	Commissioned via
ROTC/OCS: DD Form 4	

For RC Soldiers

Active Duty Orders, DA Form 1380, Other Forms that can support time in service: DA 1506, DD Form 220

Appendix A- Alignment for LES/SRB and Review Folders

Leave and Earnings Statement (LES)

Documents in this Folder support the following Pay Entitlements on the LES

- OHA
- BAH
- COLA

Record Brief

Section IV

- Validate Marital Status ensuring marriage certificate, divorce decree, annulment documents are in iPERMS.
- Check for dependents documents (i.e. birth certificates, adoption record, court orders, divorce decree and DFAS approval for secondary dependency) for each dependent. Note: Spouse birth certificate is not uploaded to iPERMS.

Appendix A- Alignment for LES/SRB and Review Folders

EDUCATION

Leave and Earnings Statement (LES)

Documents in this Folder support the following Pay Entitlements on the LES
- Foreign Language Pay
- Special Pays

Record Brief

Section V
- For Foreign Language entries, ensure there is a supporting DA Form 330

Section VI
- Ensure there are supporting documents for all courses listed in military education section

DA 1059s will not be visible in the reviews, rely on Soldier to view within AMHRR
Course Completion Certificates of at least 40 hours in length should be included
Courses less than 40 hours in length are not included in the review

Section VII
- Verify transcripts in iPERMS for all college education

Civilian college diplomas are not included in the Record Review.
Officers should only have transcripts that confer a degree
- Professional Licenses/Certifications

per DA Pam 600-3 (Officers) – Including medical licenses and board certifications
per DA Pam 600-25 (Enlisted)

Appendix A- Alignment for LES/SRB and Review Folders

AWARDS & DECORATIONS

Record Brief

Section VIII

- Ensure each award has a supporting document when applicable

Service Ribbons may not have supporting Documents. Certificates of Achievements will not populate on the review.

- ALL DA Form 638s and corresponding Award Certificates should be in this Folder.

If a DA Form 638 exists without an Award Certificate, consult AR 600-8-22 to determine if the certificate can be reconstituted by current command

If an Award Certificate exists and the DA Form 638 is missing, upload the document or list in the appropriate missing documents text box.

- There may be multiple documents for each award (DA Form 638, Orders, Certificates).

- There may be Award Orders/Memorandums that are not authorized a certificate in iPERMS (MOVSM, Good Conduct Medal, etc.)

- Recommendations: List the award name in the column next to the document to identify when Soldier has multiple of same award (ARCOM, AAM, AGCM).

Appendix A- Alignment for LES/SRB and Review Folders

PAY ENTITLEMENTS

- Record Managers must have end of month LES (or UCFR/UCPMR) and KSD/Entitlement Matrix to validate **ALL** Pay Entitlements

- **EVERY** entitlement listed on the end of month LES must be cross referenced with the KSD Matrix to determine which documents are required to substantiate the entitlement. The Key Supporting Documents Matrix can be found at this link: (https://www.hrc.army.mil/asset/16487)

- The KSD Matrix is broken down into two categories: Most Common Pay Entitlements and all others. The combined list of entitlements following the Most Common Pay Entitlements are in alphabetical order.

- Some entitlements do not require supporting documents to be filed in iPERMS (i.e., BAS) as noted in the KSD Matrix.

- Most of the documents identified on the KSD Matrix for entitlements have been validated in the previous folders of the Review; however, you must confirm that every document for each entitlement has been reviewed.
    - For Example, the BAH Entitlement paid at the with Dependent Rate requires:
      Documents- dependency documents (**Personal Data Folder**), PCS orders (**Assignment/Deployment Folder**), promotion orders (**Service Data Folder**), DA Form 5960 (**Pay, Entitlements Folder**)

Appendix B- Record Downloading

The RM has the option to download single or multiple Soldier records. Notice the yellow **DOWNLOAD SOLDIERS** button in the top right of the report results. This will create a zip file of all the records returned in the report results. The RM should create a file on their desktop for these files. Once they are downloaded the zip file must be opened and the RM must extract the files. Use this option with caution as these records contain sensitive personal and professional information. Always safeguard personally identifiable information by encrypting emails and utilizing good security measures on their computer. Use only for government business. This action is auditable and misuse of this ability can result in punitive action against the user.

iPERMS   RECORDS ▾   REVIEWS ▾

Soldier Report ate of Report: June 16, 2020 12:19:24 PM   Maximum results exceeded, not all rows shown   DOWNLOAD SOLDIERS

Full Name	SSN	DoD ID	User	Birth Date	Status	Grade	Rank	UPC	Attach	CUR...	CMF...	Dom...	Document Count
TEST.05824 IPERMS	666-00-5824			1986-12-12	A	E1	PV1	1L4B3		1/C	/	AA	6
TEST.05825 IPERMS	666-00-5825			1982-02-02	A	E1	PV1	1L4B3		1/C	/	AA	4
TEST.05826 IPERMS	666-00-5826			1983-03-03	I	E1	PV1	1L4B3		1/C	/	AA	4
TEST.05827 IPERMS	666-00-5827			1982-02-02	A	E1	PV1	1L4B3		1/C	/	AA	4
TEST.05828 IPERMS	666-00-5828			1983-03-03	A	E1	PV1	1L4B3		1/C	/	AA	4

Appendix B- Record Downloading

Soldiers Download

Are you sure you want to download 25 soldiers?

| Download | Cancel |

The RM is given these dialogs to ensure this is the expected action. The RM must next check their Inbox under their profile dropdown menu.

Soldiers Download

Record download has started. Please check your inbox to retrieve the file.

Close

Appendix B- Record Downloading

Role: Record Manager
expires in 1060 days on 2023-05-13

System (2.2.0)

Inbox

Select Rule(s)

Switch Role

Preferences

Log Out

Check the Inbox for the option below. This can happen instantly or take several minutes, depending on the system and number of records requested. Once the RM chooses **DOWNLOAD,** the system will give the option of opening or saving. Save to a folder on the computer desktop for easy retrieval.

Filename	Status	Actions		Description	Deletion Date
record_download_2020-06-16_123105.zip	Ready for Download	DOWNLOAD	DELETE	Downloadable Soldiers From AA	2020-06-23
				No items to display	

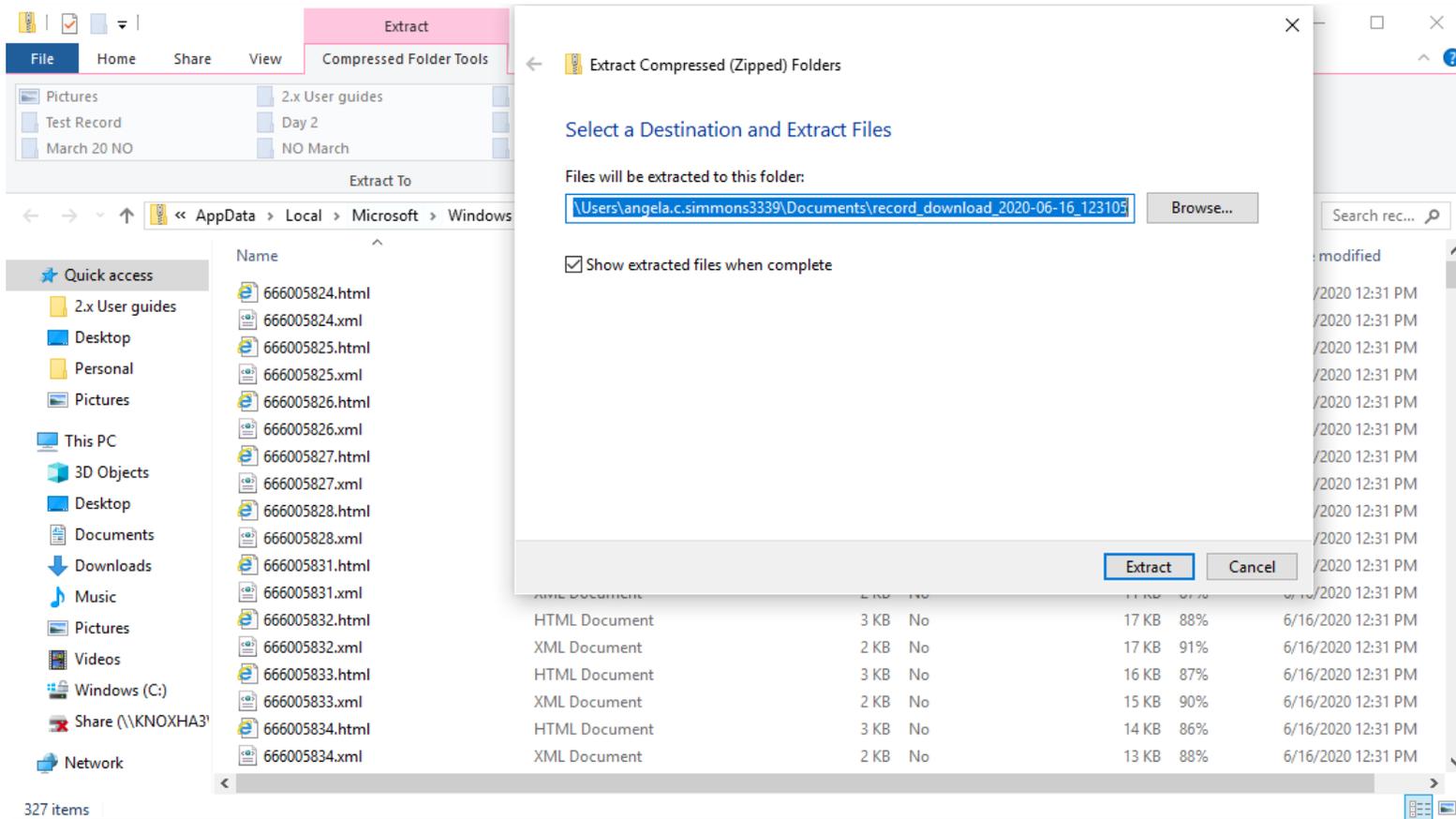Do you want to open or save **record_download_2020-06-16_123105.zip** from **ipermscoop.army.mil**?   Open   Save ▼   Cancel   ✕

Appendix B- Record Downloading

Extract files. The RM can then use the search function and enter a Soldier's SSN to find the HTML file with all of that Soldier's records listed to open. All files (TIF and PDF) will be listed here as well.