

Umoja HR Mini-Master

1 — Last update: 12 January 2024

United Nations - DOS

Table of Contents

1. HR Mini Master Overview	4
1.1. What is an HR Mini-Master Record?	4
1.2. Who requires an HR Mini Master record in Umoja?	5
2. Process Overview.....	8
2.1. HR Mini Master Form	8
2.2. End-to-End High Level Process.....	9
2.2.1. Standard Global (PA40) Process	9
2.2.1.1. Tax ID.....	11
2.2.2. Fast Entry (PA42) Process.....	13
2.3. Process T-Codes	17
2.4. Enterprise Roles & Responsibilities.....	18
2.5. Search and Request an Index Number	20
3. Create HR Mini Master (PA40).....	21
3.1. Creating New Index Number	21
3.2. Personnel Actions and Infotypes	21
3.2.1. Personnel Actions	22
3.2.2. Infotypes	22
3.3. Creating HR Mini Master Record	23
3.3.1. Infotype Actions (0000) Procedures	26
3.3.2. Infotype Personal Data (0002) Procedures.....	29
3.3.3. Infotype Organizational Assignment (0001) Procedures	30
3.3.4. Infotype Create Addresses (0006) Procedures.....	32
3.3.5. Infotype Create Contract Elements (0016) Procedures.....	34
3.3.6. Infotype Create Security / Medical Clearance (0487) Procedures	36
3.3.7. Infotype Create Communication (0105) Procedures	38
3.3.8. Infotype Change Entitlement Monitoring (9003) Procedures.....	39
4. Create HR Mini Master via Fast Entry Method (PA42)	41
4.1. Searching Existing Personnel IDs	41
4.2. Creating HR Mini Master Record via Fast Entry Method	41
4.3. Updating HR Mini Master Offline Form	51
5. Maintaining HR Mini Master	53
5.1. Modify an Infotype using PA30	53
5.2. Create a new Infotype using PA30	56
6. Displaying HR Mini Master Record	60
7. Resources	63
7.1. InfoTypes for Enter Non-Staff PA	63

7.1.1. Actions (0000):.....	63
7.1.2. Organizational Assignment (0001):	65
7.1.3. Personal Data (0002):.....	66
7.1.4. Addresses (0006):.....	67
7.1.5. Contract Elements (0016):	68
7.1.6. Create Communication (0105):	69
7.1.7. Create Personal IDs (0185):.....	69
7.1.8. Create Security/ Medical Clearance (0487):	70
7.1.9. Change Entitlement Monitoring (9003):	71

1. HR Mini Master Overview

This user guide details the process of creating an HR Mini Master record to address the requirements of offices dealing with *non-staff* such as *meeting participants, candidates, diplomats, consultants* and *uniformed personnel*. It also entails the process to create the HR Mini Master records for *members of military contingents* and *formed police unit personnel* who are new to Umoja.

- [What is an HR Mini Master Record?](#)
- [Who requires an HR Mini Master record in Umoja?](#)

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1.1. What is an HR Mini-Master Record?

There are three key aspects of the HR Mini Master:



HR Mini Master is a generic term used to refer to a unique record created for an individual containing his/her personal information (name, nationality, gender, place and date of birth, address, banking details, etc).



This record has a minimum set of Master Data (hence the term “HR Mini Master”) in the Umoja ECC system, so as to enable administrative staff to initiate actions on behalf of non-staff persons, such as travel requests and travel expense reports, as well as to issue payments.



To ensure consistency in data capture, an offline form will be standard across locations. The form will be designed/maintained centrally by the Integrated Master Data Management Service and made available to the HR Mini Master Processor on the Master Data Maintenance page on isseek: [HR Mini Master Offline Form](#).

This offline form will have areas to enter both the personal information for the HR Mini Master and the banking information.

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1.2. Who requires an HR Mini Master record in Umoja?

The HR Mini Master is required by six groups:

Group B (Administration of Benefits)

- B2 International UNCS Retiree
- B3 International UN Survivor
- B4 International UNCS Staff
- B5 International UNCS Survivor
- BB Local UNCS Retiree
- BC Local UN Survivor
- BD Local UNCS Staff
- BE Local UNCS Survivor

Group E (External Personnel)

- E1 Legal Committee Members
- E2 Participants in advisory meetings
- E3 Candidate/Applicants
- E4 Medical Evacuation and Escort for Medical Evacuation and Deaths
- E5 Eminent Persons and VIPs
- E6 Diplomats
- E7 Badges etc.
- E8 UNV Coordinator
- E9 Staff of other UN Common System Organizations
- EA PGA – President of the General Assembly
- EG Staff in UNCS-GS
- EN Staff in UNCS-NO
- EP Staff in UNCS-PR

- EU Staff in UNCS-ASG & Above

Group M (Military and Police Personnel)

- M1 Military Staff Officer
- M2 Military Observer
- M3 UN Police
- M4 Formed Police Unit Personnel
- M5 Military Contingent / Troop
- M6 Government Provided Personnel

Group X (Non-Staff Personnel not on Payroll)

- X1 Consultants
- X2 Individual Contractors
- X3 Technical Expert on Non-Reimbursable Loan (NRLE)
- X4 Interns
- X5 Scholars
- X6 Gratis Personnel (for travel) (Type II)
- X7 Volunteers (not UNV)
- X8 Fellows
- X9 UN Volunteer (UNV)
- XA Create Index Number
- XB Group Travel
- XC Non Staff in UN Common System Organizations
- XD ICTY Ad hoc Judges
- XE MICT Ad hoc Judges

Group Y (Non-Staff on Payroll)

- Y1 Part-Time Teachers
- Y2 Postal Workers

Group 7 (Secretariat Staff administered by an UN Agency)

- FS Field Service
- GS General Service
- NO National Officer
- PR Professional & Above
- AG ASG & Above

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2. Process Overview

- [HR Mini Master Form](#)
- [End-to-End High Level Process](#)
- [Process T-Codes](#)
- [Enterprise Roles & Responsibilities](#)

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2.1. HR Mini Master Form

Information regarding non-staff individuals is gathered via the [HR Mini Master Offline Form](#).. The form is maintained centrally by the Integrated Master Data Management Service and made available to the HR Mini Master Processors.

This offline form is intended to be printed by the non-staff personnel. It must be completed and returned with all relevant data, such as personal data, mailing address, communication, bank details (if applicable), along with a copy of the individual's passport and returned to the Mini Master Processor for entry into the system.

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2.2. End-to-End High Level Process

There are two processes to create an HR Mini Master record in Umoja.

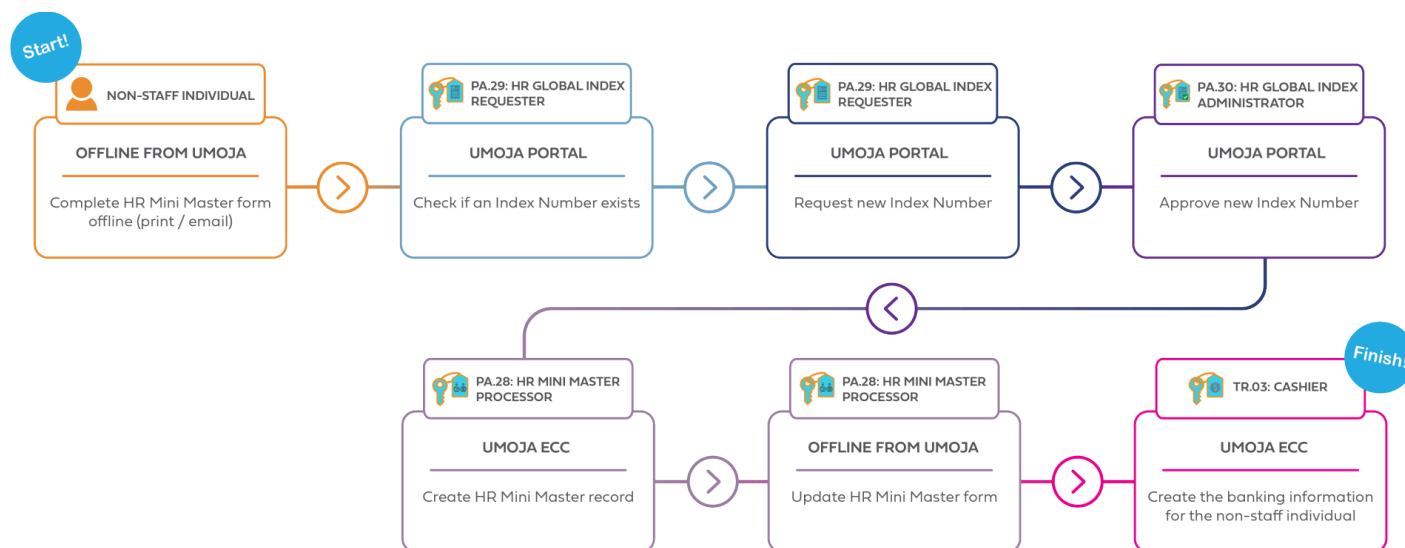
- [Standard Global \(PA40\) Process](#)
- [Fast Entry \(PA42\) Process](#)


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2.2.1. Standard Global (PA40) Process

This functionality is utilized to create HR Mini Master records for most of the Non-staff individual Employee Groups and SubGroups, as these individuals are intended to interact with the United Nations on a regular basis.



The steps involved in the standard global process of HR Mini Master process are:

1. Upon receipt of a request to create an HR Mini Master record, the HR Mini Master Processor provides the [HR Mini Master offline form](#) the non-staff individual.
2. The individual non-staff fills the HR Mini Master offline form including accurate general

and banking information (with the exception of these entities that have adopted a dedicated system to handle banking information) and returns it to the HR Mini Master Processor along with a copy of a personal identification document (Passport or National Id)

3. The HR Mini Master Processor (who is also assigned the Global Index Number Requestor role) logs in to the Portal and performs a thorough Index Number search using the information contained in the individual identification document and following the best practices highlight in the Global Index Number Request Role in Umoja Job Aid.
 - a. If the record already exists, and the Source indicated is Umoja proceed to step 7.
 - b. If the record already exists, and the Source indicated is not Umoja, the HR Mini Master Processor sends a request to Confirm the existing Index Number.
 - c. If the record does not exist, the HR Mini Master Processor sends a request to Create a new Index Number.
4. The Global Index Number Administrator receives a system message when a request to confirm/create an Index Number is submitted. The Global Index Number Administrator reviews the request and confirms an existing Index Number, creates a new Index Number or rejects the request if incomplete or incorrect.
5. The Global Index Number Requestor receives a system message when an Index Number has been confirmed or a new Index Number is created.
6. The HR Mini Master Processor executes an **Enter Non-Staff Personnel Action (PA)** in ECC to create the Mini Master record using the new/confirmed Index Number, the identification document, and the information from the HR Mini Master offline form.
7. In all these cases in which the non-staff individual already has an Index Number we need to take into consideration the following scenarios:
 - a. If the Non-staff individual returns into the organization with the same EEGroup/EESubgroup, the HR Mini Master Processor executes a **Maintain All Non-Staff Personnel Action (PA)** in Umoja ECC and updates the record (non-banking) to match the details in the offline form.
 - b. If the individual's previous Mini Master record had a different EEGroup/EESubgroup, the HR Mini Master Processor perform a search to ensure that no outstanding payments are due to the individual, and then executes the Maintain All Non-Staff Personnel Action (PA) and updates and changes the Employee Group/Subgroup combination. **NOTE: when the combinations Employee Group/Subgroup is changed the system will not be able to disburse or**

recover payments any longer.

- c. If the individual is a separate Staff Member, former Consultant or Individual Contractor, the HR Mini Master Processor will no be able to execute any change to the record and will be required to request the assistance of an HR Partner.
8. The HR Mini Master Processor updates the HR Mini Master form with the new/confirmed Index Number and sends, by inter-office mail, or delivers the form to the Local Cashier.



Should a local cashier not be available at the location, the form can be sent via email to one of the treasury hubs that services your location: (for example, UNOG treasury@unog.ch).

9. The Local Cashier receives the HR Mini Master offline form, logs in the Umoja Portal, and enters the information provided in the offline form, creating an on-behalf request for banking record associated to the new Mini Master record.
10. A two-step approval process is triggered in Umoja for the banking details. Local banking instructions are approved locally, cross border payment instructions are approved by Treasury Service Centers based on currency.

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2.2.1.1. Tax ID

The HR Mini Master record of citizens and residents of countries such as the United States of America, Chile, Brazil, and Colombia must be enriched with the Tax identification (Tax ID) needed to track payments to individuals for federal income tax and other tax purposes.

Tax ID's are recorded under the [IT0185](#) infotype (Personal IDs) and Subtype: TN.

Alexa Vergara **Personal IDs (0185)**

Find by

- Person
 - Collective search help
 - Search Term
 - Free search

Pers. No. 88039763 Pers.Assign 99999999 88039763 (1)

Name Alexa Vergara NAT Colombian Emp. Stat Inactiv..

EE Group E External C000 Bogota

EE Subgrp E2 Participant Adv Mtg

From 01.09.2017 to 31.12.9999 Chg 25.09.2017 NQUINTER

Personal IDs

IC Type Tax Identification Number

Identity Number 053802576

Issuing Authority registraduria

Date of expiry 31.12.9999

Country of issue CO

Generally, individuals doing business with the organization have a unique HR Mini Master record in Umoja. However, occasionally, the individuals' HR Mini Master record is initially created via the PA42 Fast Entry method, but the individual returns to the organization in a different capacity. In those cases, a new Mini Master record will need to be created via the standard processes: Global Index Requestor (GID) and Personnel Action (PA).



REMEMBER! The EE/Group Subgroup of records created via PA42Fast Entry method (starting with 88) cannot be changed.

In addition, Umoja recognizes the Tax ID as a unique record; therefore, if an 88 HR Mini Master record is associated with a Tax ID, when you create the second record via the standard PA40 process, you will not be able to associate it to the same Tax ID again. The Tax ID number remains associated with the Business Partner record generated by the first HR Mini Master record; this record cannot be changed or deleted by the users. When cases like that occur, you need to follow these steps:

1. Remove the Tax ID from the [IT0185](#) infotype (Personal IDs) on the HR record. If you don't remove it the Tax ID will synch back in the original Business Partner record and

will prevent you from associating the number with the new HR Mini Master record.

2. Raise an [iNeed](#) ticket with a request to the Master Data Maintenance (MDM) team – iNeed Group name: Umoja MDM – IBP Data Maintainers to remove the Tax ID from the original Business Partner HR Mini Master record.
3. Attach the screenshot of IT0185 infotype (Personal IDs) to confirm that the Tax ID was already removed.

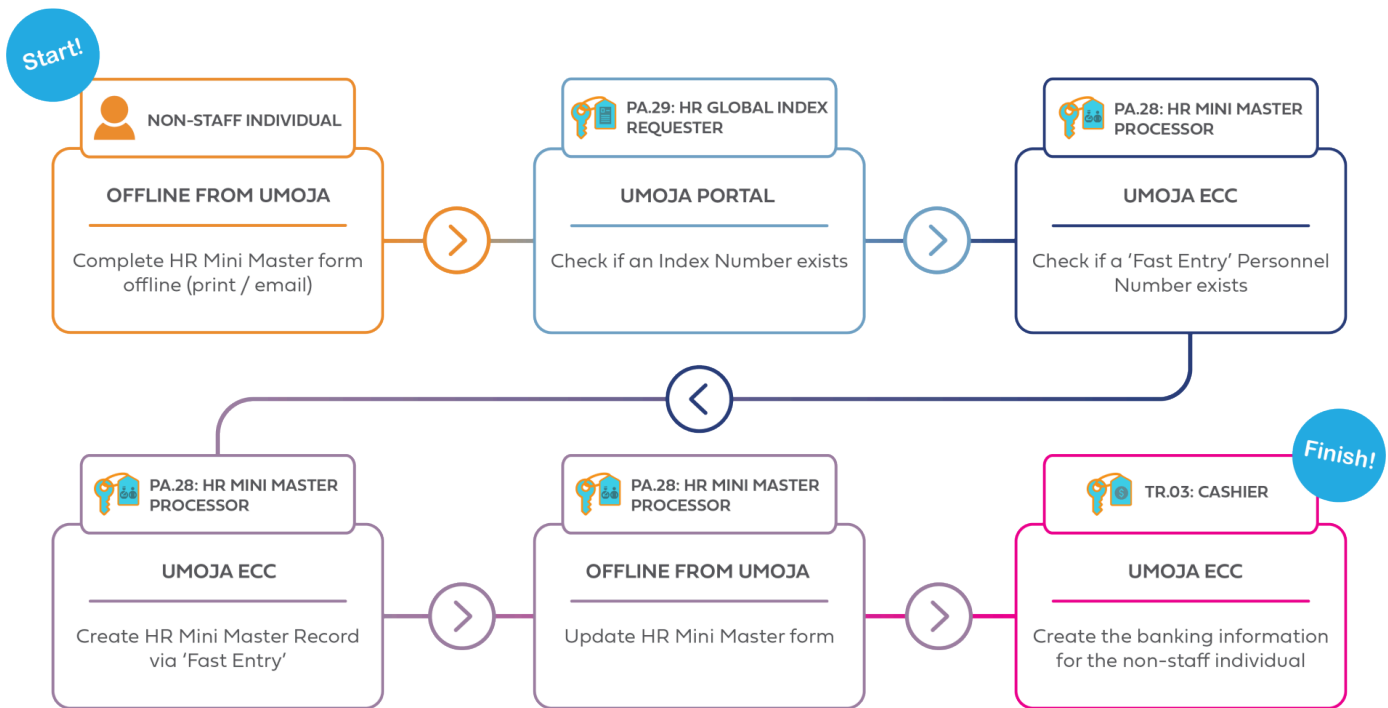
For example, A Brazilian economist is invited by DESA to present her work at an event organized by the Department. The Mini-Master Maintainer creates her record as a Participant in Advisory Meeting (E/E2) via the PA42 Fast Entry method. The record is associated with her Brazilian Tax ID. One year later, the economist is appointed as a member of the ACABQ. DGACM needs a new record for her as Legal Committee Member (E/E1) via the Standard PA40 method (GID request + Personnel Action). To be able to associate the same Tax ID to the new record, the Mini Master Maintainer in DGACM removes the Tax ID from the 88 records and raised an iNeed ticket to the MDM team requesting to remove the Tax ID from the Business Partner record of the 88 records and attached to the ticket the screenshot of IT0185 that confirms there no longer is a Subtype TN created for this infotype.

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2.2.2. Fast Entry (PA42) Process

The HR Mini Master *Fast Entry* process is an enhanced method of creating individual records. It was developed to expedite the process of creating HR Mini Master Records for participants in advisory meetings (Employee Subgroup E2). Under exceptional circumstances, *Fast Entry* may also be used for military contingent, and formed police unit personnel (Employee Subgroups M4 and M5), who require commercial travel for reason of emergency, medical evacuation, or other exceptional cases.



This transaction enables users to enter all required information for the HR Mini Master record on one screen, rather than creating each Infotype individually. Moreover, the HR Mini Master “Fast Entry” process generates and assigns a Personnel Number automatically to meeting participants, eliminating the requirement for requesting an Index Number through the Global Index Number system.

This HR Mini Master “Fast Entry” process can be used to create records for individuals who do not have recurring interactions with the United Nations such as meeting participants, military contingent and formed police units personnel. However, the standard process to create HR Mini Master Records (Search/Request Index Number, Approve Index Number, and **Enter Non-Staff Personnel Action**) can still be utilized for these Employee Groups/SubGroups if there is a possibility that this individual will interact with the organization in a different capacity (i.e. consultant, legal committee members or diplomat).

This functionality cannot be utilized to create HR Mini Master records for individuals who interact with the United Nations on a regular basis, such as individuals who fall under Employee Group X (consultants and individual contractors), Sub Groups of Employee Group E (legal committee members, diplomats or candidates/applicants), or Group M (military staff officers, military observer or UN police).

The steps involved in the HR Mini Master standard global process are:

1. Upon receipt of a request to create a HR Mini Master record for a non-staff person (such

as meeting participant, military contingent, and formed police unit personnel), the HR Mini Master Processor provides the HR Mini Master offline form to the non-staff individual.

2. The individual non-staff fills the HR Mini Master offline form including accurate general and banking information (with the exception of these entities that have adopted a dedicated system to handle banking information) and returns it to the HR Mini Master Processor along with a copy of a personal identification document (Passport or National Id).
3. The HR Mini Master Processor (who is also assigned the Global Index Number Requestor role) logs in to the Portal and performs a thorough [Index Number](#) search using the information contained in the person's identification document and following the best practices highlight in the Global Index Number Request Role in Umoja Job Aid. In the Fast Entry process, the HR Mini Master Processor verifies if the meeting participant already has a record in Umoja.



It is critical to executing these steps prior to creating any new record in order to avoid duplication of records in Fast Entry process.

- a. If the record already exists, and the Source indicated is Umoja proceed to step f.
 - b. If the record already exists, and the Source indicated is not Umoja, the HR Mini Master Processor sends a request to Confirm the existing Index Number.
4. In all these cases in which the non-staff individual already has an Index Number we need to take into consideration the following scenarios:
 - a. If the Non-staff individual returns into the organization with the same EEGroup/EESubgroup, the HR Mini Master Processor executes a **Maintain All Non-Staff Personnel Action (PA)** in Umoja ECC and updates the record (non-banking) to match the details in the offline form.
For example, a training consultant has delivered a workshop in UNOG, now UNON requires the services of the same consultant. As the consultant already has an HR Mini Master record in Umoja with the correct combination of EE Group/Subgroup (X/X1), UNON can immediately utilize it to create the new CIC contract.

- b. If the individual's previous Mini Master record had a different EEGroup/EESubgroup, the HR Mini Master Processor perform a search to ensure that no outstanding payments are due to the individual, and then executes the **Maintain All Non-Staff Personnel Action (PA)** and updates and changes the Employee Group/Subgroup combination. **NOTE: when the combinations Employee Group/Subgroup is changed the system will not be able to disburse or recover payments any longer.**
For example, a former legal committee member has been selected by ESCAP to serve the as consultant. ESCAP will execute the Personnel Action – Maintain Non-Staff, to change the EE Group/Subgroup from E/E1 to X/X1.
- c. A HR Mini-Master Processor will not be able to execute any change or update to the record former Consultant or Individual Contractor and will require the assistance of an HR Partner ALL or an HR Partner CIC to update the record.
For example, a former consultant is traveling to attend a conference as a participant in an advisory meeting. Therefore, the Mini-Master Processor will request the HR Partner CIC at his duty station to execute the Personnel Action – Maintain Non-Staff, to change the EE Group/Subgroup from X/X1 to E/E2.



Every time a change of the combinations Employee Group/Subgroup is required, you need to ensure that all payments to the individual have been fully disbursed; once the Employee Group/Subgroup is changed, the system will not be able to disburse or recover payments.

5. If no Index Number Record exists the HR Mini Master Processor executes a search in ECC to verify if a Mini Master executed via the **Fast Entry method (PA42)** already exist. **Remember: the record created via the Fast Entry method starts with digits 88 and does not appear in the Global Index database.**
6. If the record does not exist, the HR Mini Master Processor may proceed with “Fast Entry” metho to create the HR Mini Master record using the information the information from the individual's identification document for the biographical information and using the HR Mini Master Offline form for additional information such as an address, email and

telephone number. The execution of **PA42** generates a Personnel Number which is automatically linked to the HR Mini Master record of the non-staff individual. This Personnel Number is an 8-digit number that starts with 88 and it is not related to Index Numbers generated via the Global Index Number Request process. This number is restricted to travel purposes and cannot be used to move the meeting participants or contingent/police personnel to a different Employer Group /Subgroup (for example, should the individual be selected as a consultant or individual contractor).

7. The HR Mini Master Processor updates the HR Mini Master form with the new/confirmed Index Number (individual's Personnel Number, in case of "Fast Entry" method) and sends, by inter-office mail, or delivers in person, the form to the Local Cashier.



Should a local cashier not be available at the location, the form can be sent via email to one of the treasury hubs that services your location: (for example, UNOG treasury@unog.ch).

8. The Local Cashier receives the HR Mini Master offline form, logs in the Umoja Portal, and enters the information provided in the offline form, creating an on-behalf request for banking record associated to the new Mini Master record.
9. A two-step approval process is triggered in Umoja for the banking details. Local banking instructions are approved locally, cross border payment instructions are approved by Treasury Service Centers based on currency.

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2.3. Process T-Codes

Use the appropriate T-code below:

HR Mini Master: Standard Process

Create & Maintain Non-Staff Record via PA	Maintain Individual Infotypes	Display HR Master Record
PA40	PA30	PA20

HR Mini Master: Fast Entry Process

Create HR Mini-Master	Maintain Individual Infotypes	Display HR Master Record
PA42	PA30	PA20

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2.4. Enterprise Roles & Responsibilities

The following Enterprise Roles are involved in the HR Mini Master process.

HR Mini Master Processor (PA28)

- Receives requests from substantive offices that require the HR Mini Master record to be created.
- Provides HR Mini Master offline form to non-staff persons for completion.
- Uses the 'Display HR Master Data' function (PA20) in Umoja ECC to determine if a record already exists for a specified non-staff or if it is necessary to create a new record.
- Executes in Umoja ECC a PA to create the HR Mini Master.
- Executes any updates or changes to the HR Mini Master in Umoja ECC.
- Sends the HR Mini Master offline form to the Local Cashier for entry of banking information.

Global Index Number Requestor (PA29)

- Uses Global Index Search to determine if an Index Number already exists for a specified non-staff, and if so, confirm the Index Number.
- Requests a new Index Number if no record exists in the database.



The PA29 role is part of the PA28 role.

Global Index Number Administrator (PA30)

- Receives the request from Global Index Requestor for new Index Number or confirmation of an existing Index Number.
- Creates new Index Number(s)
- Confirms an existing Index Number in the Umoja Global Index Database

Cashier (TR30)

- Receives HR Mini Master offline form(s)* from the Mini Master Processor in order to create the bank details for non-staff individual
- Some entitles have implemented a local “ad-hoc” system to automate the collection of banking details

HR Partner All (PA01)

- Has all rights of HR Mini Master Processor to create/update Mini Master records in Umoja ECC.
- Only this role can edit records of separated staff members who may come back to the organization in other capacities (such as meeting participants or consultants).

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2.5. Search and Request an Index Number

Why do we need to check if the individual already has an Index Number?

- Meeting participants may have an existing record because they dealt with the organization before as a meeting participant or in another capacity.
- Therefore, it is important to avoid the creation of duplicate records in the system to minimize errors and prevent confusion.

1. The HR Mini-Master Requestor receives the duly filled HR Mini Master offline form from the non-staff person along with an identification document that will be used to validate the information.
2. The Global Index (GID) Requester is the role in Umoja that has the access to submit an Index Number request via the Umoja Global Index Database (GID).
3. Before requesting a new Index Number, a thorough search must be conducted to determine if the non-staff person already exists in Umoja.

#A request for a new Index Number is created only after confirming that the non-staff person does not already have an Index Number.

Refer to the [Global Index Requestor Role in Umoja](#) for steps on Searching and Requesting an index number.

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3. Create HR Mini Master (PA40)

Just as with the 'Fast Entry' process, the process for creating a standard HR Mini Master begins with the non-staff individual completing the offline form and the PA29 role searching for an existing Index Number.

However, if no Index Number is found, a new one must be requested and created in the Umoja Portal before the PA40 transaction can be executed.

Refer to the [Global Index Requestor Role in Umoja](#) for steps on Searching and Requesting an index number.

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3.1. Creating New Index Number

Refer to the [Global Index Requestor Role in Umoja](#) for steps on Searching and Requesting an index number.

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3.2. Personnel Actions and Infotypes

Before creating a HR Mini Master record, let's first get familiarized with the following terms:

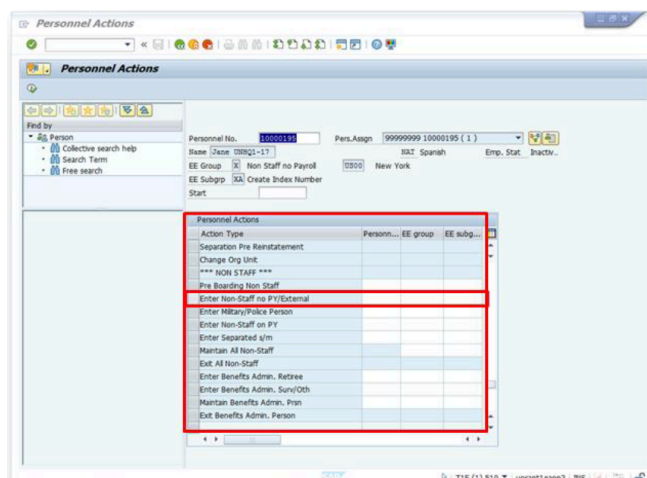
- [Personnel Actions](#)
- [Infotypes](#)

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3.2.1. Personnel Actions

- A Personnel Action can represent a specific step in the employee lifecycle such as onboarding, promotion, transfer or termination. In every personnel action there are corresponding reasons for action which provide further detail on the action used. For example, for a Initial Appointment action, the reason for the action may be replacement of a staff on maternity leave.
- Each Personnel Action is made of a sequence of related infotypes that appear on the screen in sequential order and that are required to be updated to complete the Personnel Action
- The series of infotypes and their sequence are stored in the info group.

Some of the different Personnel Actions specific to Non-Staff are displayed below.



Click image to open expanded view

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3.2.2. Infotypes

- Infotypes are sets of data fields concerning the same or similar subject matter.
- Each Infotype appears as a single data entry screen in Umoja ECC.
- [Actions \(0000\):](#)
- [Personal Data \(0002\):](#)


- [Create Addresses \(0006\):](#)
- [Create Contract Elements \(0016\):](#)
- [Create Personal IDs \(0185\):](#)
- [Create Security/ Medical Clearance \(0487\):](#)
- [Create Communication \(0105\):](#)
- [Change Entitlement Monitoring \(9003\):](#)

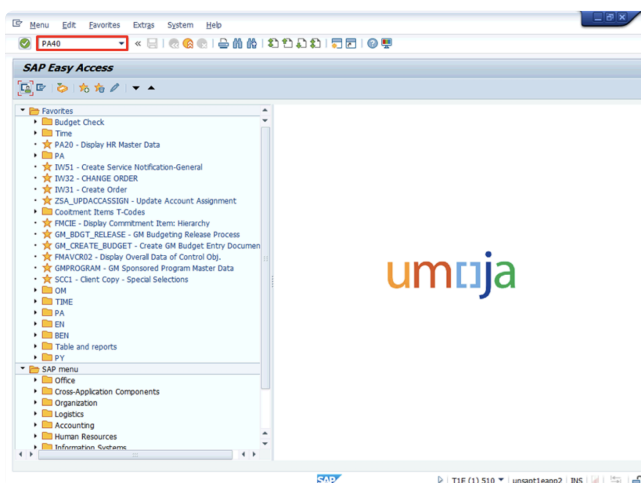
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3.3. Creating HR Mini Master Record

Upon receipt of the [HR Mini Master form](#), perform the following steps:


1. To start the transaction, log in to ECC and Type PA40 in the *Command* field.
2. Click the **Enter**  icon to start the PA.



Click image to open expanded view

3. Enter the Non-staff person's Personnel No (index number) in the *Personnel No.* field.

Click image to open expanded view


4. After entering the personnel number, click the **Enter**  icon to validate the personal information, such as full name.
5. Populate the *Start* field. The start date must be at least one day after the Index Number is created (the *Valid From* field).

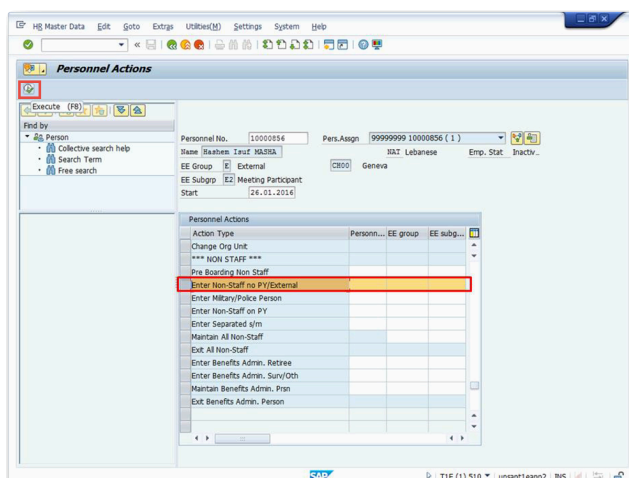
Click image to open expanded view



The *Start* field does not signify the beginning of travel or the date that the individual starts to work. It simply signifies the start date of

availability of the master record itself, so it could be today's date or it could be set to a date in the past (as long as it is at least one day after the Index Number validity date). **Remember: once the Infotype is saved you will not be able to change the Start Date**

6. Scroll down the list and select the appropriate Personnel Action. For this example we select **Enter Non Staff No PY/External** to create a new record for a consultant.
7. Click the **Execute**  icon.





Click image to open expanded view

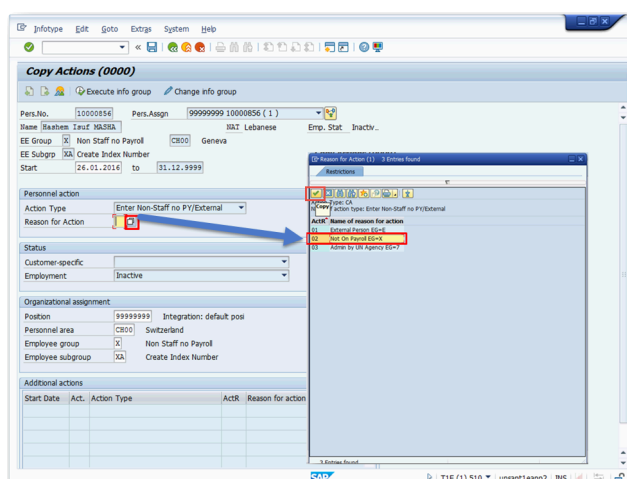
8. Complete the following Infotypes in the order indicated:
 - a. [Infotype Actions \(0000\) Procedures](#)
 - b. [Infotype Personal Data \(0002\) Procedures](#)
 - c. [Infotype Organizational Assignment \(0001\) Procedures](#)
 - d. [Infotype Create Addresses \(0006\) Procedures](#)
 - e. [Infotype Create Contract Elements \(0016\) Procedures](#)
 - f. [Infotype Create Security / Medical Clearance \(0487\) Procedures](#)
 - g. [Infotype Create Communication \(0105\) Procedures](#)
 - h. [Infotype Change Entitlement Monitoring \(9003\) Procedures](#)

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3.3.1. Infotype Actions (0000) Procedures

1. The [\(blank\) *Infotype Copy Actions \(0000\)*](#) screen appears. Click the **Matchcode**  icon in the *Reason for Action* field.
2. Select the Reason for action associated to **Employee Group and Subgroup**. E.g **02 – Not On Payroll EG=X for consultant**.
3. Click the **Continue**  icon.



Click image to open expanded view



The following three options in the ***Reason for Action*** pop-up screen are separated by Employee Group:

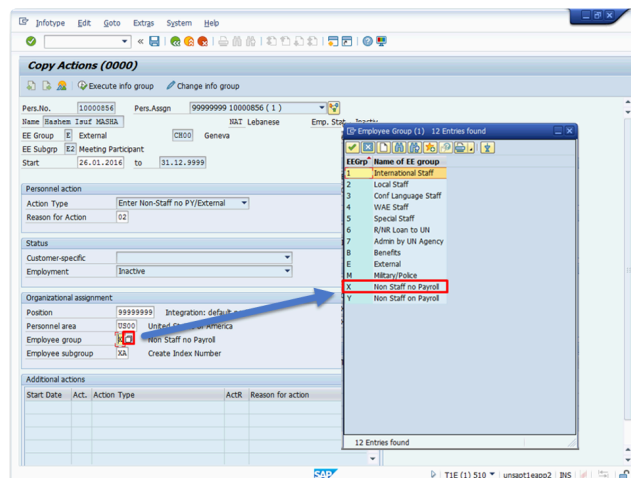
- **01: External Person EG=E:** This is used for personnel completely external to the UN, such as meeting participants, legal committee members (including

Special Rapporteurs, candidate/applicants, escort to medevac, eminent persons, and other UN personnel entered for tax purposes)

- **02: Not On Payroll EG=X:** This is used for UN personnel not paid via payroll such as consultants, individual contractors, fellows, UN Volunteers, scholars, gratis personnel, and for staff of other UN agencies such as UNICEF.
- **03: Admin by UN Agency EG=7:** This is used for Secretariat personnel administered by other UN agencies such as UNDP. This is usually for Travel purposes

4. Click the **Matchcode**  icon in the *Employee group* field.

5. Double-click, the relevant Employee group from the list. **E.g., *X for Non-Staff no Payroll*.**






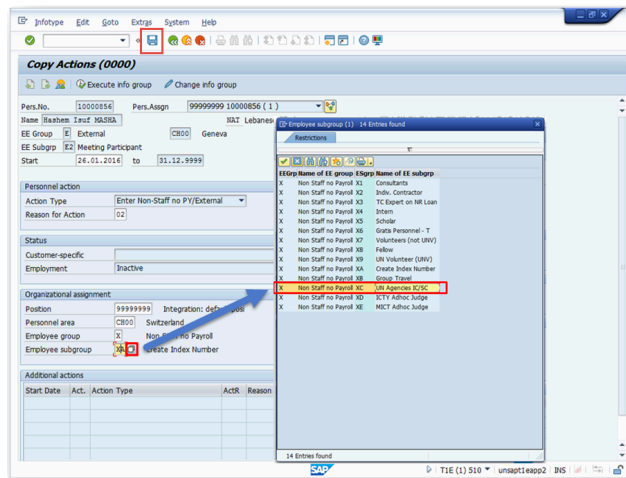
Click image to open expanded view



The Employee Group should be match the selection in step 9. Otherwise, it will generate an error in the creation of the Master

Record.

6. Click the **Matchcode**  icon in the *Employee subgroup* field.
7. Double-click an Employee Subgroup from the list **E.g. Consultant**.
8. Click the **Enter**  icon to confirm the record validity.
9. Click the **Save**  icon to save the record.



Click image to open expanded view

10. A warning message appears at the bottom of the screen, it indicates that the **Enter Non-Staff PA** is delimiting the previous PA Create Index Number. The information about the delimitation of a record appears at the bottom of the screen everytime you modify an existing infotype and save the changes delimiting the validity, in time, of the previous record. This message applies to the entire PA.



If the warning message “This entry deletes a record” appears, this indicate that another PA with the same Start date was previously executed. The record being “deleted” is the entry created in the previous PA process. To



ensure that the Enter Non-Staff PA does not override the previously run PA, set the start date of the Enter Non-Staff PA to a day (or more) after the previous PA.

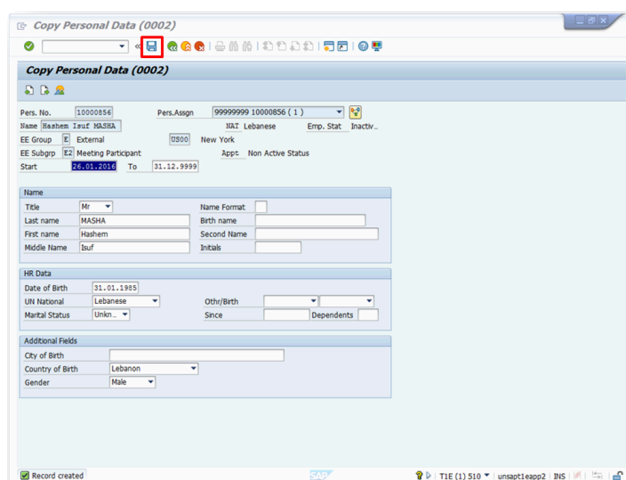
11. The screen for the next infotype appears [\(blank\)_*Personal Data \(0002\)*](#).

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3.3.2. Infotype Personal Data (0002) Procedures

- After completing the **Actions (0000)** infotype, the [\(blank\)*_Infotype Copy Personal Data \(0002\)*](#) screen appears. Review the pre-populated data derived from the Index Number record and update the fields, if necessary.
- Click the **Enter**  icon to confirm the record validity.
- Click the **Save**  icon to save the record.






Click image to open expanded view

4. The screen for the next infotype appears [\(blank\)_*Organizational Assignment \(0001\)*](#).

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3.3.3. Infotype Organizational Assignment (0001) Procedures

1. After completing the **Personal Data (0002)** infotype, the [\(blank\) *Infotype Copy Organizational Assignment \(0001\)*](#) screen appears. The *Subarea* field should be defaulted to the Personnel Subarea entered in the Index Number request. You can also change the field if required.
2. The *Payr. Area* field is always defaulted to **99 = No Payroll Relevant**
3. The *Pos. Type* field generally must remain empty for Employee Group E (and 7) but must be filled for Employee Group X and defaulted to Non Staff -Non T, which means that this category of personnel is not paid through payroll.
4. The *Position* field always defaults to **99999999**. It remains **99999999** for all Subgroups of Employee Group E and X except for the Employee Subgroup Consultants (X1) for whom a position may be created and associated to the record.
5. If, for reporting purposes, you need to indicate the Organization Unit to which the non-staff reports (e.g., for consultants or interns), click on the **Assignment**  icon and enter or search the relevant Organizational Unit ID.
6. Click the **Enter**  icon to confirm the record validity.
7. Click the **Save**  icon to save the record. This step **MUST** be saved and cannot be skipped. If the **Save** icon is not clicked, the individual will not receive the required travel privileges in the system.

Copy Organizational Assignment (0001)

Org Structure

Pers. No. 10000856 Pers.Assign 99999999 10000856 (1)

Name (Realtime) Enric RAJRA SGT Lebanese Emp. Stat. Inactiv...

EE Group External 0800 New York

EE Subgroup Meeting Participant Apps Non Active Status

Start 16.01.2014 To 31.12.9999

Enterprise Structure

CoCode 1000 United Nations

Pers.area 0800 United States of America Subarea 0800 New York

Cost Ctr Bck Area 1599 Umoja SAP Tech. Confl.

Personnel Structure

EE group Non Staff no Payroll Payr.area 99 Not Payroll Relevant

EE subgroup UN Agencies IC/SC Pos. Type Non-staff Not Y

Organizational Plan

Percentage 100.00 Assignment

Position 99999999 Integration: default p.

Job key 00000000


Org. Unit 00000000

Record created

Click image to open expanded view



Click **Enter** to confirm the record validity. Even if you have not entered or changed any field, IT0001 must be saved to correctly generate the Mini Master.

8. After clicking the **Save**  icon, the Subtypes for infotype “**Addresses**” pop-up screen appears. Double-click **Mailing Address** *from the list.

Infotype Edit Goto Extras System Help

Subtypes for infotype "Address" (1) - 7 Entries found

Restrictions

Styp Name

1 Mailing Address

2 Permanent Address

3 Emergency Contact

4 Duty Station

5 TDY Address

6 Tax Purposes

7 Family Address (Prior DS)

7 Entries found

Employee subgroup X1 Consultants

Additional actions

Start Date Act. Action Type ActR Reason for action

Record created

*Click image to open expanded view





Selecting the Mailing Address Subtype triggers the creation of the Business Partner (BP) record, which is essential to enable payment through Umoja. It is, therefore, critical to create a mailing address for every Individual Master Record (staff and non-staff) and make the record available to issue a meeting participant's contract or initiate travel.

- The screen for the next infotype appears, [Create Addresses](#).


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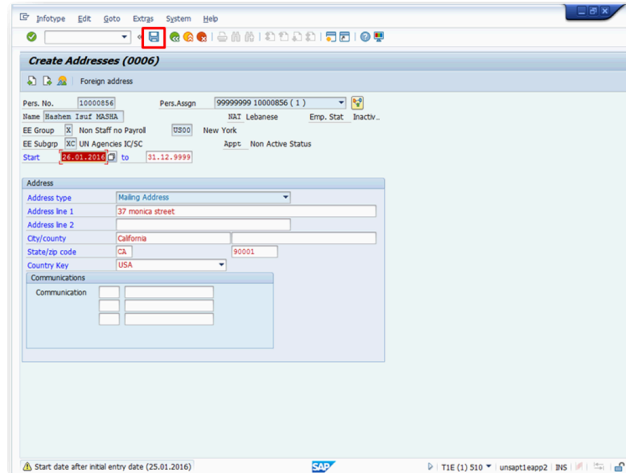
Last modified: 15 August 2021

3.3.4. Infotype Create Addresses (0006) Procedures


- After completing the **Organizational Assignment (0001)** infotype, the [\(blank\) *Infotype Create Addresses \(0006\)*](#) screen appears. Populate the data in the different fields.
- Click the **Enter**  icon to confirm the record validity.
- Click the **Save**  icon to save the record.

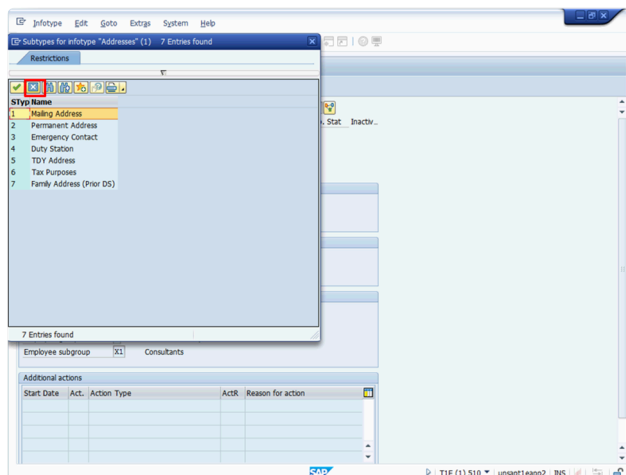
Click image to open expanded view

4. Click the **Save**  icon, the Subtypes for infotype “**Addresses**” pop-up screen appears.



Click image to open expanded view

5. The system allows you to create an additional subtype for infotype “Addresses”. Repeat the previous steps if you wish to create other address types or click the **Close**  icon to move to the next Infotype. Adding a Mailing Address is the minimum requirement to proceed.




Click image to open expanded view

6. The screen for the next infotype appears, **Create Contract Elements (0016)**.

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3.3.5. Infotype Create Contract Elements (0016) Procedures

- After completing the Addresses (0006) infotype, the [Infotype Create Contract Elements](#) screen appears. This Infotype is only applicable to certain Employee Groups, such as Consultants, Individual Contractors and Interns. If this is not applicable, (for example, Staff on UNCS), click the **Next**  icon, **NOT Save**.



Although it's good practice to keep updated contract durations for Consultant and Individual Contractor records, the actual start and ends of their contract can be accurately reported from the Start and End date of the PO issued to them.

- If it is applicable, populate the following fields regarding the individual's contract:
 - Enter *Contract Type* field.
 - Valid Until* It is the end date of the validity of the contract

Create Contract Elements (0016)

Maintain activities

Pers. No.: 10000154 Pers. Assign.: 99999999 10000056 (1)

State: [Lebanon] Inst: 94553

EE Group: [Non Staff no Payroll] New York

EE Subgrp: [UN Agencies IC/SC] Appr: Non Active Status

Start: 2012-01-01 To: 31.12.9999

Contractual Regulations

Contract Type: Non-staff Others Valid Until: []

Additional fields

Rules Series ID: []

Status ID: []

Recruitment Indicator: No

Contract Status: []

Contract Term: []

Contractual Payment Status Order: Priorated

Remarks

[]

[]

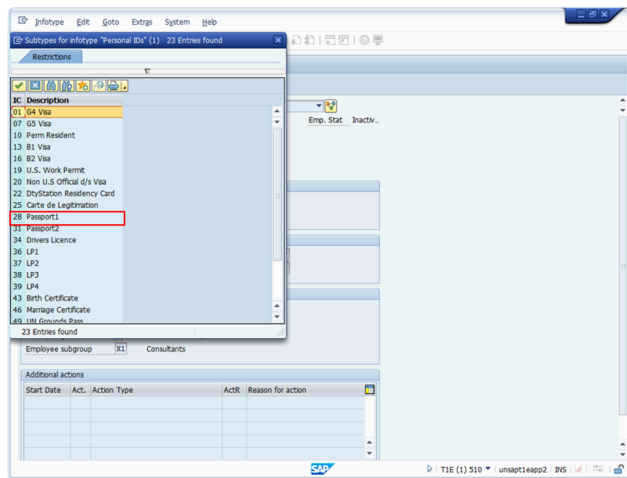
[]

Infotype 0006 was skipped because no subtype was chosen

TIE (1) 510 unsp1eapp2 295

Click image to open expanded view



- c. The Subtypes for infotype “**Personal IDs**” pop-up screen appears. Select the required _ID _ type from the list. In this case, double-click **Passport1**.



Click image to open expanded view



The Personal IDs Infotype allows for entry of Personal ID information if required (for example, for a Meeting Participant you may be required to enter Passport/Visa information).

- d. Enter the required passport information.
3. Click the **Enter**  icon to confirm the record validity.
 4. Click the **Save**  icon to save the record.

Click image to open expanded view

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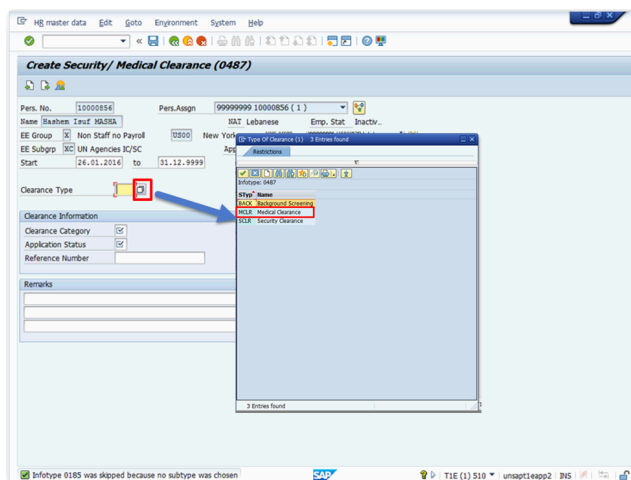
3.3.6. Infotype Create Security / Medical Clearance (0487) Procedures

- After completing the Contract Elements (0016) infotype, the [Infotype Create Security / Medical Clearance](#) screen appears. Click the **Matchcode**  icon in the *Clearance Type* field.




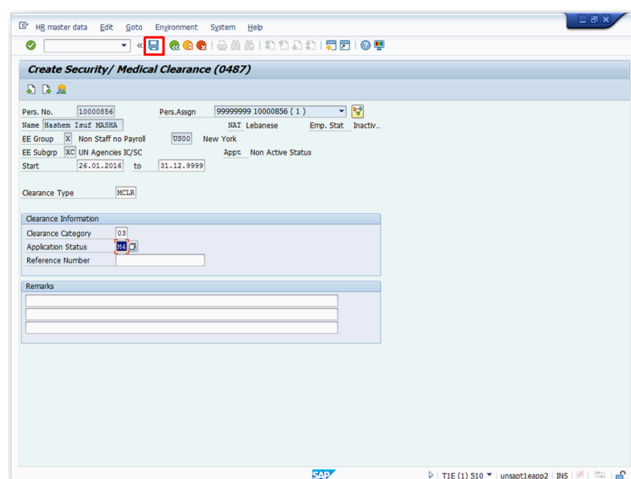
If Medical/Security Clearance is not required, you can click the **Next**  icon (**NOT Save**).

- In this case, double-click **MCLR Medical Clearance** on the “**Type of Clearance**” pop-up screen.



Click image to open expanded view

- Populate the other mandatory fields such as *Clearance Type*, *Clearance Category* and *Application Status* and click the **Save**  icon.



Click image to open expanded view

- The Subtypes for infotype “**Communications**” pop-up screen appears. Select the required communication type from the list. In this case double-click **Personal Email Address**.
Create Communication.


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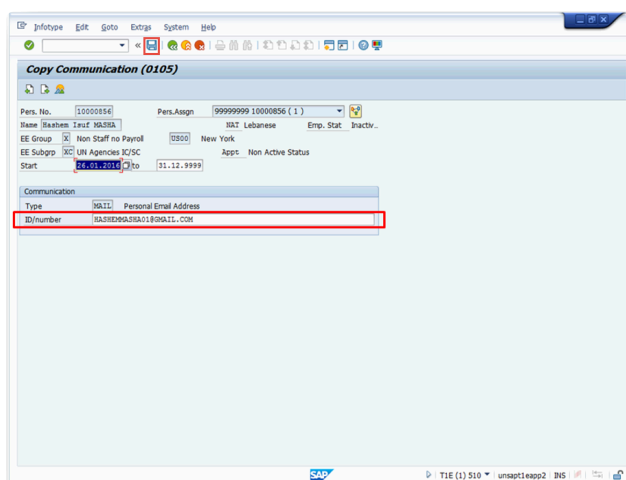
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3.3.7. Infotype Create Communication (0105) Procedures


1. After completing the Create Security/Medical Clearance (0487) infotype, the [Infotype Create Communication](#) screen appears. Enter the non-staff's personal email address in the *ID/number* field.
2. Click the **Enter**  icon to confirm the record validity.
3. Click the **Save** icon to save the record



The screenshot shows the SAP Infotype 0105 'Copy Communication' screen. The 'ID/number' field is highlighted with a red box. The screen displays various fields for personal data and communication details.

Click image to open expanded view



After clicking the **Save**  icon, the system prompts you to create an additional Subtype for infotype "Communication". You can repeat the previous steps to enter additional forms of communication or click the **Close** icon to move to the next Infotype.

4. The screen for the next infotype appears, Change Entitlement Monitoring (9003).

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3.3.8. Infotype Change Entitlement Monitoring (9003) Procedures

1. After completing the Create Communication (0105) infotype, the [Infotype Change Entitlement Monitoring](#) screen appears. Click the **Action Completed Flag** drop-down.
2. Select **Yes** from the list.

The screenshot displays the SAP 'Change Entitlement Monitoring Infotype (9003)' screen. The top section contains fields for 'Pers. No.' (10000856), 'Pers. Assign.' (99999999 10000856 (1)), 'Name' (Haashem Isuf MASHA), 'EE Group' (Non Staff no Payroll), 'EE Subgr' (UN Agencies IC/SC), 'Start' (12.04.2016), 'To' (12.04.2016), 'Appr' (Non Active Status), and 'Chngd' (25.05.2016 | H1TRAIN001). The 'Personnel Action Details' section shows 'Subtype' (0302 Personnel action monitoring), 'Action / Reason' (CA01), 'Effective Date' (12.04.2016), 'Action' (CA Enter Non-Staff no PY/External), 'Reason' (01 External Person EG=E), 'Initiated / Last Update Date' (25.05.2016), and 'Initiated / Last Update By' (H1TRAIN001). The 'Action Completion Status' section shows 'Action Completed On' (25.05.2016) and 'Action Completed Flag' (Yes). The 'Remarks' section is empty.


Click image to open expanded view

3. Click the **Save**  icon to save the record.

This screenshot is identical to the previous one, showing the same SAP 'Change Entitlement Monitoring Infotype (9003)' screen. The 'Save' icon, represented by a floppy disk, is highlighted with a red box in the top toolbar.

Click image to open expanded view



Click the **Save**  icon to save the data in all the Infotype screens and return to the Personnel Actions screen.

An HR Mini Master Record has been created.

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4. Create HR Mini Master via Fast Entry Method (PA42)

This topic provides information on how to:

- [Searching Existing Personnel IDs](#)
- [Creating HR Mini Master Record via Fast Entry Method](#)
- [Updating HR Mini Master Offline Form](#)

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4.1. Searching Existing Personnel IDs

Refer to the [Global Index Requestor Role in Umoja](#) for steps on Searching and Requesting an index number.


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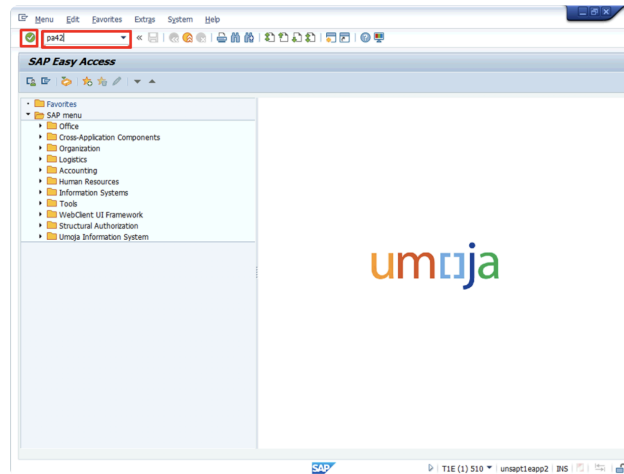
Last modified: 15 August 2021

4.2. Creating HR Mini Master Record via Fast Entry Method

These steps follow the scenario of creating HR Mini Master records for meeting participants (Employee Subgroup E2), formed police unit, and military contingent personnel (Employee Subgroups M4 and M5).

Upon receipt of the [HR Mini Master form](#), perform the following steps:

1. To start the transaction, log in to ECC and type PA42 in the *Command* field.
2. Click the **Enter**  icon.

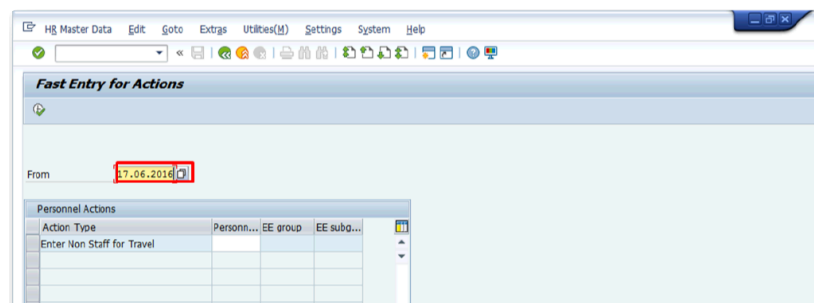


Click image to open expanded view

3. Type the appropriate date in the *From* field. In this case, type **17.06.2016**.



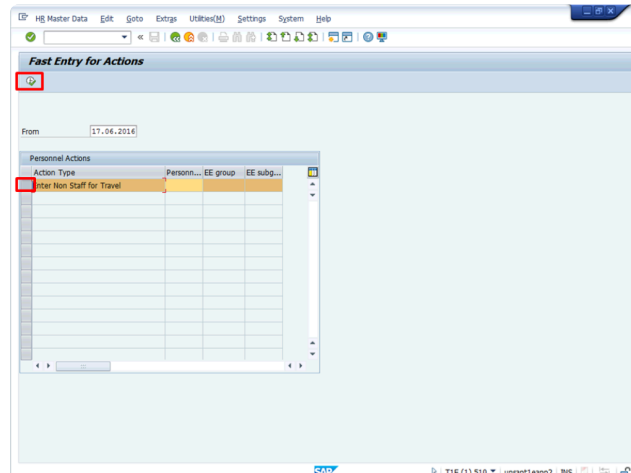
The From date is the date in which the record is required in the system to create a travel request. It should be preferably set to the current date however, if required, it can be set in the past. **This is NOT the date of the travel or the date of the meeting/conference.**



Click image to open expanded view

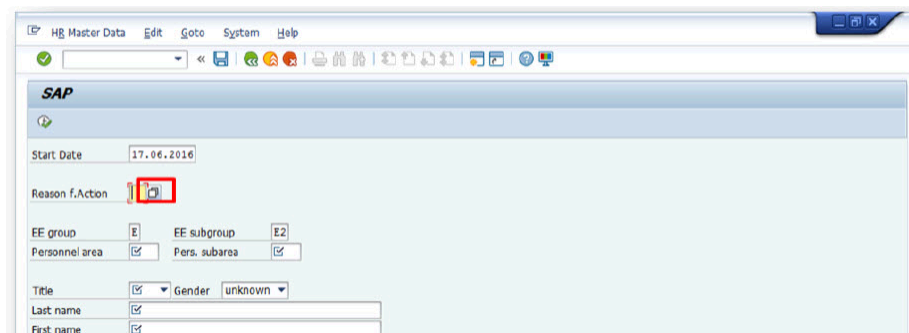
4. Select the appropriate Action Type?>Enter Non Staff for Travel

5. Click the* Execute*  icon.

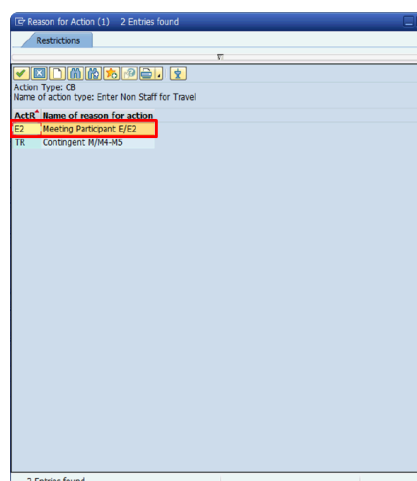


Click image to open expanded view


6. Click the **Matchcode**  icon in the *Reason f.Action* field.



7. Select the appropriate Reason for Action. In this case, double-click **E2 Meeting Participant E/E2**.

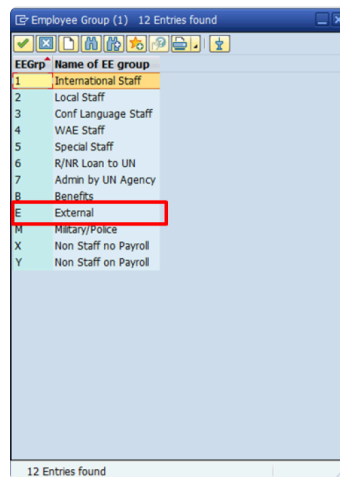


Click image to open expanded view


8. Click the **Matchcode**  icon in the *EE group* field.
9. Select the appropriate Employee Group. In this case, double-click **E External**.



In HR Mini Master “Fast Entry” process, the only applicable options are E for Meeting Participants and M for Contingent members. Any other selection will generate an error and will not allow the record to be saved.



Click image to open expanded view

10. Click the **Matchcode**  icon in the *EE subgroup* field.
11. Select the appropriate Employee Subgroup. In this case, double-click **E2 Meeting Participant**.



It is critical to select the correct combination of Reason for Action, Employee Group, and Employee Sub Group. The system does not accept invalid combinations and will generate an error. The table below shows the correct combination of all the three fields:

Reason for Action	Employee Group	Employee Subgroup
E2 Meeting Participant E/E2	E External	E2 Meeting Participant
TR Contingent M/M4-M5	M Military/Police	M4 Formed POL unit FPU M5 Mil.Contingent/Troop

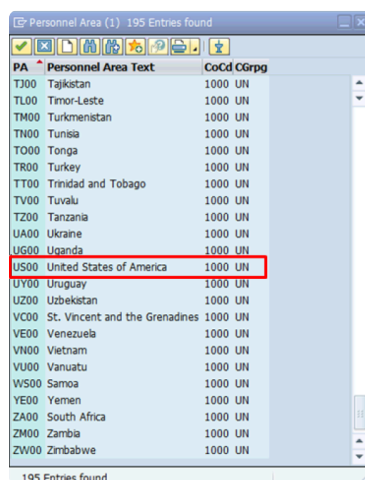
12. Click the **Matchcode**  icon in the *Personnel area* field.



The Personnel Area consists of a four-digit alphanumeric code (for example, US00 = United States of America) and corresponds to the country


where the office that administers the Non-Staff is located (i.e. the office that raises the travel, to which the Non-Staff is assigned to, reporting to, etc.)

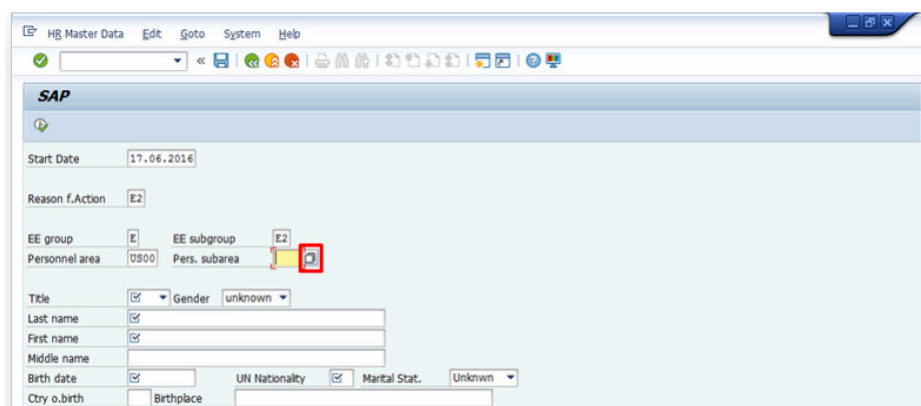
13. Select the appropriate Personnel Area. In this case, double-click **US00**.



PA	Personnel Area Text	CoCd	Cörpg
TJ00	Tajikistan	1000	UN
TL00	Timor-Leste	1000	UN
TM00	Turkmenistan	1000	UN
TN00	Tunisia	1000	UN
TO00	Tonga	1000	UN
TR00	Turkey	1000	UN
TT00	Trinidad and Tobago	1000	UN
TV00	Tuvalu	1000	UN
TZ00	Tanzania	1000	UN
UA00	Ukraine	1000	UN
UG00	Uganda	1000	UN
US00	United States of America	1000	UN
UY00	Uruguay	1000	UN
UZ00	Uzbekistan	1000	UN
VC00	St. Vincent and the Grenadines	1000	UN
VE00	Venezuela	1000	UN
VN00	Vietnam	1000	UN
VU00	Vanuatu	1000	UN
WS00	Samoa	1000	UN
YE00	Yemen	1000	UN
ZA00	South Africa	1000	UN
ZM00	Zambia	1000	UN
ZW00	Zimbabwe	1000	UN

Click image to open expanded view

14. Click the **Matchcode**  icon in the *Pers. subarea* field.




SAP HR Master Data

Start Date: 17.06.2016

Reason f.Action: E2

EE group: E EE subgroup: E2

Personnel area: US00 Pers. subarea: 

Title: ☒ Gender: unknown

Last name:

First name:

Middle name:

Birth date: UN Nationality: ☒ Marital Stat.: Unknown

Ctry o.birth: Birthplace:



The Personnel Subarea is equivalent to a duty station and is a subdivision of the Personnel Area. The Personnel Subarea is also identified by a four-

digit alpha-numeric identification code (for example, New York = US00).

15. Select the appropriate Personnel Subarea. In this case, double-click **US00 New York**.



Click image to open expanded view

16. Now, you will populate different fields using the information as it appears on the meeting participant's identification document (for example, Passport). The following fields are mandatory and must be populated to avoid errors:



Last name and First name are critical fields for travel purposes. Ensure that these entries match exactly the information indicated on the national passport. If the passenger's name indicated on the ticket does not match the information contained in the passport, it may result in denial of boarding, or lead to problems at customs/immigration at the arrival destination. For further details on how to determine Given Name(s) and Surname(s), refer to the Global Index Number Requestor Job Aid.

Click image to open expanded view


- *Title* – This entry needs to match the gender selection. The incorrect combination of title and gender will generate an error.
- *Gender*
- *Last name*
- *First name*
- *Birth date*
- *UN Nationality*

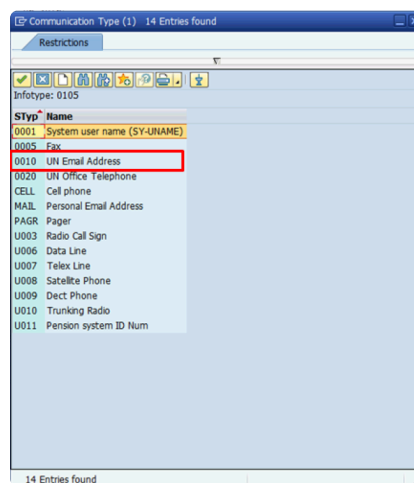
17. Now, you will populate the different fields of the mailing address of the personnel. The following fields are mandatory and must be populated to avoid errors:




The Mailing Address information must not be omitted as it triggers the creation of the BP (Business Partner) record and makes the record available in the Travel portal. If the mailing address of the meeting participant is not known at the time of the creation of the Mini Master, enter a generic address (for example, c/o United Nations Office at Geneva) and update the individual Infotype when the information becomes available.

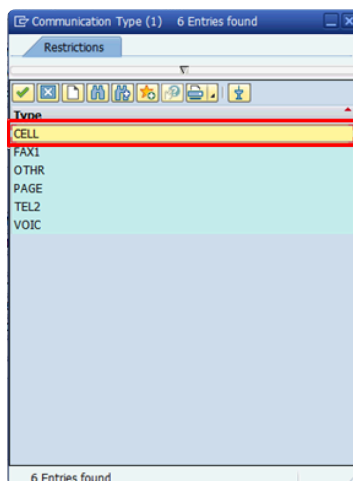
Emergency contact information should also be added.

- Street/House
 - City
 - Country
 - State – mandatory only for addresses in the USA
 - Postal /Zip Code mandatory only for addresses in the USA
- r. Click the **Matchcode**  icon in the *Email* field.
- s. Select the appropriate eMail type. In this case, double-click **0010 UN Email Address**.




Click image to open expanded view

- t. Type the appropriate email id in the *Email* field. In this case, type **123@un.org**.
- u. Click the **Matchcode**  icon in the *Cell* field.
- v. Select the appropriate Communication type. In this case, double-click **CELL**.



Click image to open expanded view

- w. Type the cell number of the personnel in the *Number* field. In this case, type **0034892371094**.
- x. Click the **Execute**  icon.
- y. You have successfully created the Mini Master record for the personnel. The Enter Non Staff for Travel PA generates a Personnel Number for meeting participants/contingent/formed police unit personnel who require to travel and have no record in Umoja.



The Personnel No. generated in this process is an 8-digit number that begins with 88... These numbers are not related to Index Numbers generated via the Global Index Number Request process and are thus not available in the GID system. Personnel Actions for individuals who already have a record in Umoja (Personnel Number) will continue to be processed via transaction PA40.

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4.3. Updating HR Mini Master Offline Form

The Master record for the non-staff individual has been created. The HR Mini Master Processor will now update the HR Mini Master offline form and send or deliver it to the Local Cashier.

To ensure financial information is updated for the non-staff individual:

1. Write the Index Number in the HR Mini Master offline form (General Data section) as as illustrated below:

UNITED NATIONS NATIONS UNIES

HR MINI MASTER REGISTRATION FORM

NOTE: This form is to be used by non-staff individuals including meeting participants and staff administered by other agencies.

Instructions:

1. Please answer each field completely. Note **BOLD** fields are Mandatory. TYPE or PRINT in dark ink.
2. Please attach one of the following official supporting documents: copy of passport, copy of birth certificate, copy of state ID.

Part A - General Data

Title (Mr./Mrs./etc):	Ms		
First Name (as in Government ID):	Aya		
Middle Name (as in Government ID):			
Last Name (as in Government ID):	Monsouri		
Have you worked with the UN in the past?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	If yes, please provide Index Number	10110720
Date of Birth (dd/mm/yyyy):	27/07/1985		
Place of Birth (Country):	Algeria	(City):	Algeris
Gender:	Male <input type="checkbox"/>	Female <input checked="" type="checkbox"/>	
Nationality:	Algerian		
Email Address:	Amonsouri85@yahoo.com		
Telephone Number:	213 233 2233		
Address:	123 Chemin Luciani		
Algeris		Algeria	
(City)	(Zip Code)	(Country)	

Click image to open expanded view

2. Scan the form and send or deliver it to the Local Cashier
3. If a Local Cashier is not available, the updated form is sent by email to one of the treasury hubs that services your location: NYHQ, UNON, UNOG, ESCAP
4. The Local Cashier creates a bank record on behalf of the non-staff member in Umoja Portal
5. The newly created bank record will be routed for approval to the local or hub treasury service centre



The steps for updating HR Mini Master offline form will be the same for the Fast Entry process as well.

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5. Maintaining HR Mini Master

After creating the HR Mini Master record by executing the Enter Non-Staff PA in ECC, you can update the Mini Master using the following T-codes:



PA40 can not be used on HR Mini Master records created using PA42


T-codes	Description
PA40	<p>It is used to make the major changes in the Mini Master. These major changes include:</p> <ul style="list-style-type: none"> • Switching Employee groups (Consultant becoming Individual Contractor) • Changing nationalities • Switching organizational unit (For example, earlier the person was travelling with expenses from DM and now for another UN office) • Changing Contract duration
PA30	<p>It is used to make the minor changes in the Mini Master. These minor changes include:</p> <ul style="list-style-type: none"> • Changing mailing address, telephone number and email • Entering/Updating passport information • Entering/Updating Visa information • Changing Travel privileges

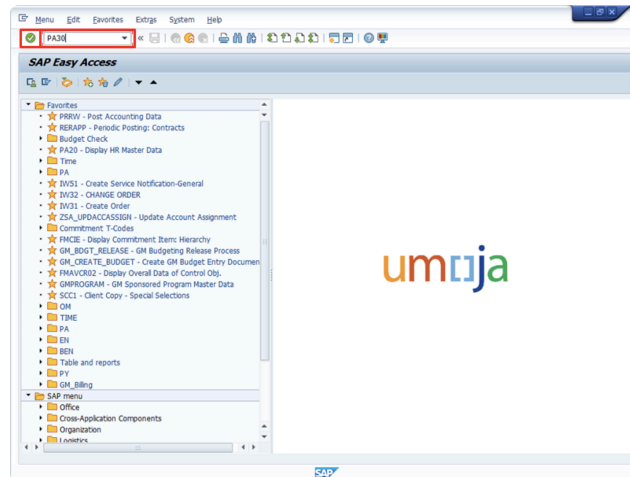
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5.1. Modify an Infotype using PA30

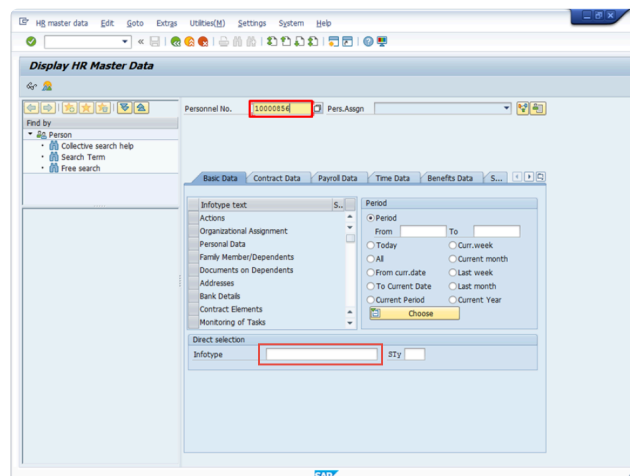
Alternatively, you can modify the Infotypes of the newly created record through PA30 transaction. In this example, let's modify the Infotype for the mailing address of the meeting participant.

1. Type PA30 in the *Command* field.
2. Click the **Enter**  icon.



Click image to open expanded view


3. Enter the index number in the *Personnel No.* field and press the Enter  icon.
4. Click the **Matchcode**  icon in the *Infotype* field.

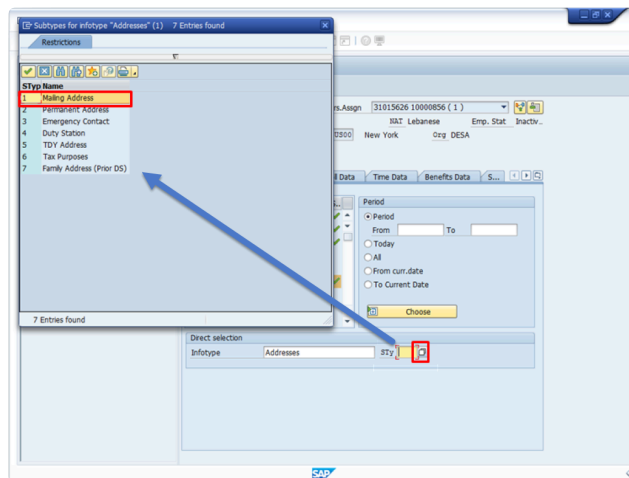


Click image to open expanded view



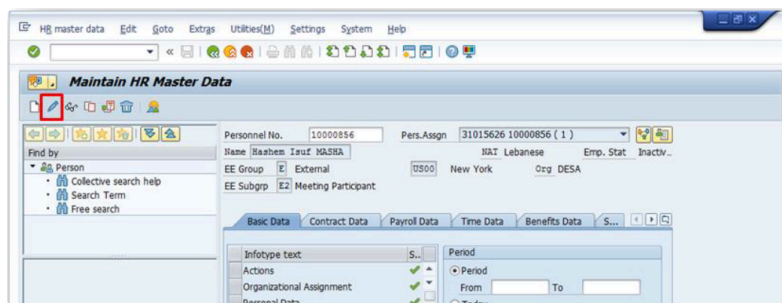
It's quicker to enter the Infotype number directly in the Infotype field at the bottom of the screen. For example, enter **6** for the Infotype Addresses.

5. Select the required Infotype from the list. In this case, double-click **Addresses**.
6. To select the Infotype Subtype, click the **Matchcode**  icon in the STy field.
7. Select the required Subtype from the list. In this case, double-click **Mailing Address**.



Click image to open expanded view

8. To edit the mailing address of the personnel, click the **Change**  icon.



Click image to open expanded view

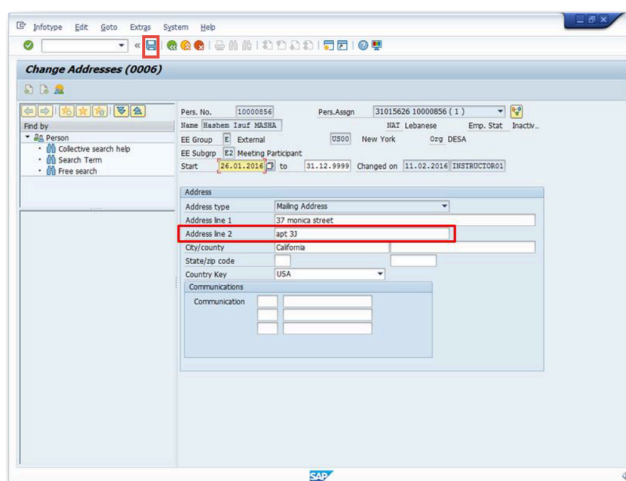
9. The [Change Addresses](#) screen appears. Here, you can make the changes to the mailing address of the personnel. In this case, the changes have been made to the *Address line*

2 field.

10. Edit the information in other fields as required.

11. Click the **Enter**  icon to confirm the record validity.

12. Click the **Save**  icon.



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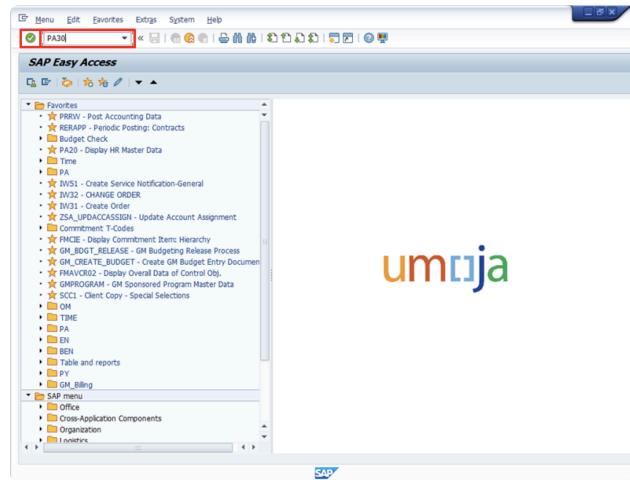
Last modified: 3 November 2021

5.2. Create a new Infotype using PA30

You can create a new Infotypes of the newly created record through PA30 transaction. In this example, let's create an Infotype to add Visa information.

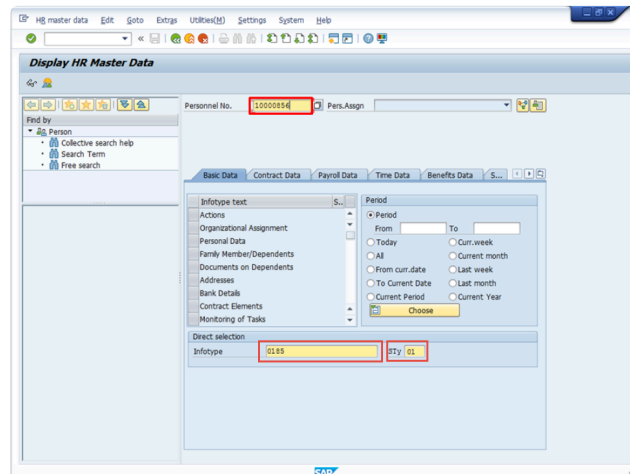
1. Type PA30 in the *Command* field.


2. Click the **Enter**  icon.

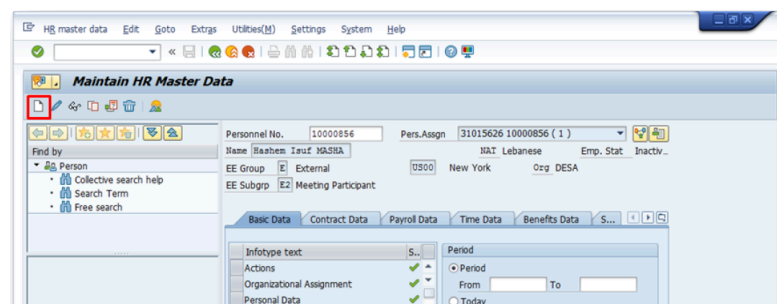


Click image to open expanded view

3. Enter the index number in the *Personnel No.* field and press the Enter  icon.



4. In the *Infotype* field enter the infotype **0185** for **Personal IDs**.
5. In the *Subtype (STy)* field, enter **01** for **G4-Visa**.
6. To add the selected Infotype, click the **Create**  icon



Click image to open expanded view



7. The Personal IDs (0185) screen appears. Here, you can add the visa information by populating the fields such as:

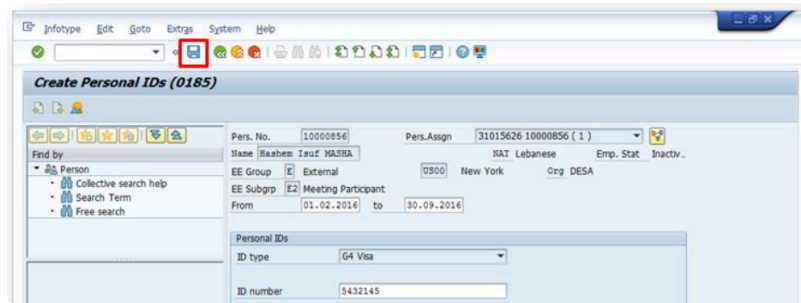
- *ID number*
- *Date of issue*
- *Valid to*
- *Place of issue*
- *Country of issue*

Click image to open expanded view



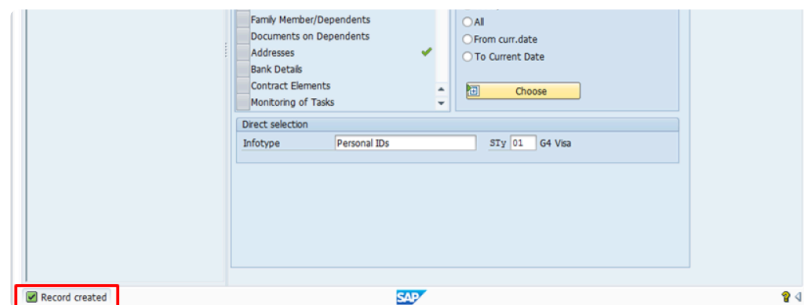
The *From* and *to* fields at the top of the screen should also be populated. These fields refer to the validity of the Infotype and should match the dates of the Visa.

- Click the **Enter**  icon to confirm the record validity.
- Click the **Save**  icon to save the changes made to the Infotype Personal IDs.



Click image to open expanded view

10. A message appears in the status bar indicating that the record has been created/changed successfully.



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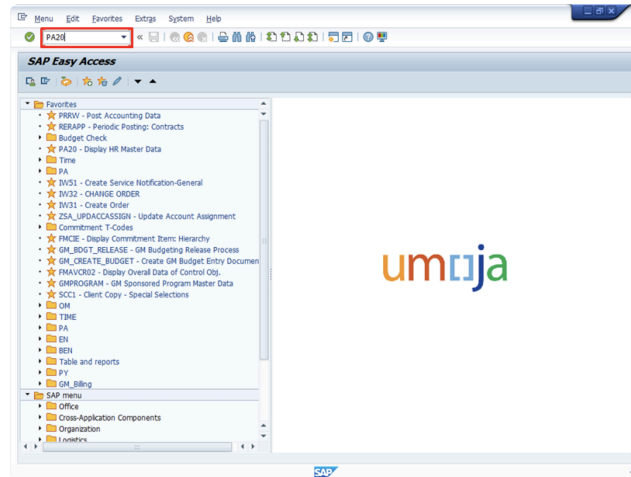
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6. Displaying HR Mini Master Record

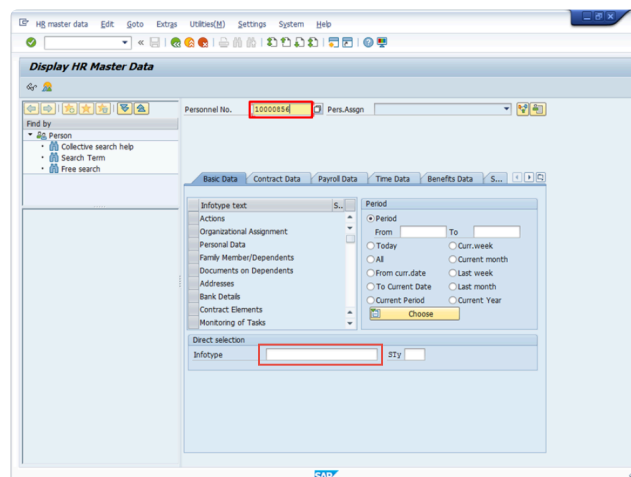
The PA20 transaction is used to display the HR Mini Master record.

1. Enter PA20 in the *Command* field.
2. Click the **Enter**  icon.




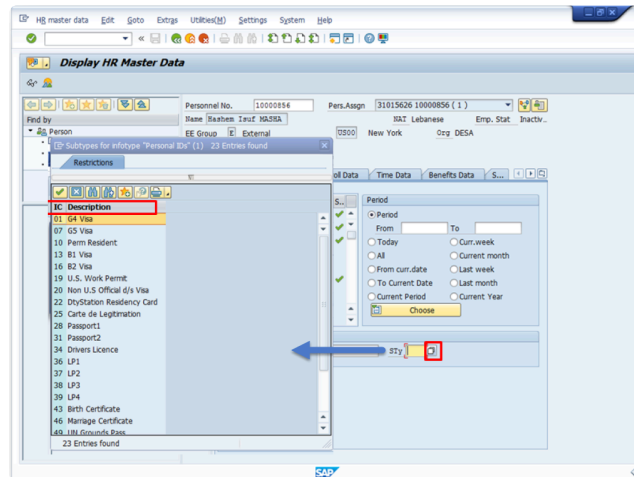
Click image to open expanded view

3. Enter the index number in the *Personnel No.* field and press the Enter  key.
4. Enter the required Infotype number in the *Infotype* field. In this case, type 185 for the [Infotype Personnel IDs](#) and press the Enter  key.



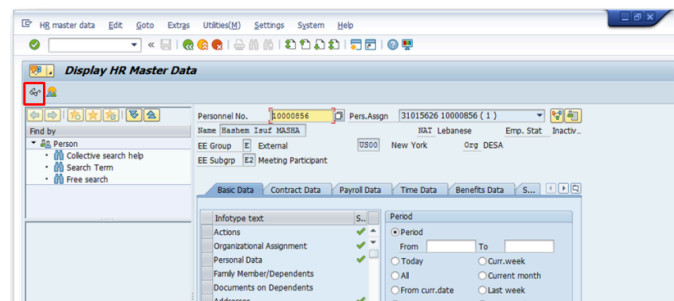
Click image to open expanded view

5. Click the **Matchcode**  icon in the **STy** field to select the **Infotype** subtype.
6. Select the required **subtype** from the list. In this case, double-click **G4 Visa**.



Click image to open expanded view

7. Click the **Display** icon.



Click image to open expanded view

8. The Display Personal IDs (0185) screen appears. Here, you can verify the Visa information that you entered previously using the PA30 transaction.

Click image to open expanded view

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iManual published by United Nations DOS/CDOTSPDF version of the manual may become outdated.
Please always consult this site to get the most updated information.

7. Resources

The following resources are available:

- [InfoTypes for Enter Non-Staff PA](#)
- [GID iManual](#)

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7.1. InfoTypes for Enter Non-Staff PA

Let's view the different Infotypes that will appear in the PA Enter Non-Staff no PY/External.

- [Actions \(0000\):](#)
- [Personal Data \(0002\):](#)
- [Create Addresses \(0006\):](#)
- [Create Contract Elements \(0016\):](#)
- [Create Personal IDs \(0185\):](#)
- [Create Security/ Medical Clearance \(0487\):](#)
- [Create Communication \(0105\):](#)
- [Change Entitlement Monitoring \(9003\):](#)

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7.1.1. Actions (0000):

The Infotype **Actions (0000)** contains information such as Reason for Action, Employment status, Position, Employee group and Employee subgroup.

This infotype cannot be skipped.

It consists of the three following sections:

- *Personnel action* comprises two fields.
 - *Action Type* (the first field) the selection of this field defaults to the Action Type selected in the PA40 screen and cannot be changed from this screen.
 - *Reason for Action* (the second field) every personnel action has to be associated with a reason for action which further describes the purpose of the personnel action. There can be multiple reasons for action per personnel action type. E.g. the reason for action that describes the “Enter Non-Staff Non on Payroll” Action is the following:
01 External Person EG=E
02 Not on Payroll External EG=X
03 Admin by UN Agency EG=7



You can record ONLY one personnel action on a specific date using the same combination Action Type/Reason for Action.

- *Status* specifies the employee position in the organization (e.g. active staff member or retiree). The Status field defaults based on the Action Type and Reason for Action previously selected and cannot be edited from this screen. In the case of Non-Staff Individual, the Status will ALWAYS be “Inactive”
- *Organizational assignment* describes the type of position the individual is occupying and where this position is located in the organization.
 - *Position* – A position is a specific (individual) employee assignment. A position has descriptive data attached to it, such as titles, a specific description (posting), and a job code. Only for consultants, it is currently open the option to be associated with a position.
 - *Personnel Area* represents a geographical location of an organization, in Umoja is the country where the position is located.
 - *Employee Group and Employee Subgroup* — All employees (staff members and non-staff persons) are categorized into employee groups and subgroups. The Employee Group (EEG) represents the contractual status such as International, Local, Conference Language Staff, Non-staff, External, etc. The Employee Subgroup (ESG) represents the category, such as Professional and above, Field Service, General Service, Interpreter, Translator, Military Staff Officer, Meeting Participant, Consultant, etc. The combination of Employee Group and Employee Subgroup determines service conditions of the individual and eligibility for payment

of benefits and entitlements.

For Non-Staff individuals, the information entered in the Organizational Assignment is not relevant to Payroll calculation but is used for reporting purposes or to enable the calculation of the travel entitlements.

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7.1.2. Organizational Assignment (0001):

The Infotype Organizational Assignment (0001) contains organizational information such as position type, payroll area, organization unit, and others.

This infotype cannot be skipped.

It consists of the three following sections:

- **Enterprise Structure:** The *CoCode* (Company Code), *Pers.area* (Personnel area), and *Cost Ctr* (Cost Center) fields default to the value entered for Position in infotype Actions (0000). **They cannot be edited in this infotype.**
- **Personnel Structure:**
 - The *EE group* (Employee group) and *EE subgroup* (Employee subgroup) field default to the values specified in infotype Actions (0000). **They cannot be edited in this infotype.**
 - The *Payroll Area* field groups together employees for which payroll is run at the

same time and sets the dates for the payroll period. The payroll area defaults to 99 – Non Staff Not Through Payroll for Non-Staff whose payments are not processed through payroll.

- *Organizational Plan** displays information pertaining to the employee's position. The *Percentage*, *Job Key* and *Org. Unit* fields default to values based on the Position selected in the Organizational Management (OM) module. The use of Position is only allowed as an option when creating a Consultant record.

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7.1.3. Personal Data (0002):

The Infotype Personal Data (0002) contains personal information such as name, date of birth, marital status and other additional information.

This infotype may be skipped if updated and accurate at the time the PA is executed.

This infotype is automatically populated with the information recorded while requesting the Index Number. The information recorded should match the information provided in the legal documents. If no changes are required, you can skip the infotype.

Now is the time to complete and enrich the record with the missing information. Please check the documents (provided during Onboarding) and update the *Marital Status* and *Since* fields. And remember to fill out the *City of Birth* field: It is a required field.

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7.1.4. Addresses (0006):

The Infotype Create Addresses (0006) contains information such as Address, City and Zip code.



Each non-staff individual **MUST** have at least the Mailing Address saved in their Mini- Master. Failure to add the Mailing Address will cause the default of this subtype to a dummy record

The Mailing Address subtype (for this infotype) cannot be skipped..

It consists of the two following sections:

- Address
- Communications

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7.1.5. Contract Elements (0016):

The Infotype Create Contract Elements (0016) contains contract information such as contract type and contract validity, if applicable.

This infotype cannot be skipped.

It consists of the three following sections:

- **Contractual Regulation:** type and duration of the contract.
- **Additional field:** This section not applicable to Non-staff individuals.
- **Remarks:** This section not applicable to Non-staff individuals.

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7.1.6. Create Communication (0105):

The Infotype Create Communication (0105) contains communication information such as communication type, communication number or email.

It can be skipped provided it has previously been created as an individual infotype through PA30.

The screenshot shows the SAP 'Create Communication' (0105) form. The 'Communication' section is highlighted with a red box, showing 'Type' as 0011 and 'Personal Email Address' as Jane12345@gmail.com. Other fields include Pers. No. 10000195, Pers. Assign. 99999999 10000195 (1), Name Jane 00001-17, EE Group External, EE Subgroup Meeting Participant, and Start/End dates 03.09.2014 to 31.12.9999.

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7.1.7. Create Personal IDs (0185):

The Infotype Create Personal IDs (0185) contains personal ID document information such as ID type, ID number and date of issue.

It can be skipped provided it has previously been created as an individual infotype through PA30.

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7.1.8. Create Security/ Medical Clearance (0487):

The Infotype Create Security/ Medical Clearance (0487) contains information such as clearance type, clearance category and a reference number, if necessary.

This infotype stores data pertaining to the staff member's security clearance, medical clearance, and background screening.

It consists of the two following sections:

- Clearance Information
- Remarks

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7.1.9. Change Entitlement Monitoring (9003):

The Infotype Change Entitlement Monitoring (9003) contains personnel action details and action status.

It consists of the three following sections:

- **Personnel Action Details:** do not edit this section
- **Action Completion Status:** This section sets the PA completion flag. The completion flag is used to generate notifications to the staff member and for reporting purposes.
- **Remarks:** do not edit this section

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