Umoja HR Mini-Master

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United Nations - DOS

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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 iseek: <u>HR Mini Master Offline Form</u>.

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 <u>HR Mini Master Offline Form</u>.. 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 <u>HR Mini Master offline form</u> 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 backing 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.



- 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 <u>IT0185</u> infotype (Personal IDs) and Subtype: TN.

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← → ₩ ₩ ₩ ₩ ▷ ☆ Find by • ♣ Person • ♣ Collective search help • ♣ Search Term • ♣ Free search	Pers. No. 88039763 Name Alexa Vergara EE Group E EE Subgrp E2 Participant From 01.09.20	Pers.Assgn C000 Bo t Adv Mtg 117 to 31.12.9999	999999999 88039763 (1) <u>NAT</u> Colombian Emp. Stat Inactiv gota Chg 25.09.2017 NQUINTER
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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).



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 <u>IT0185</u> 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.

- Raise an <u>iNeed</u> 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 <u>do</u> <u>not</u> 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 <u>Index Number</u> 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.

- 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.



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.



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 <u>Global Index Requestor Role in Umoja</u> 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 <u>Global Index Requestor Role in Umoja</u> for steps on Searching and Requesting an index number.



3.1. Creating New Index Number

Refer to the <u>Global Index Requestor Role in Umoja</u> for steps on Searching and Requesting an index number.



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



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.

Personnel Actions		
Q		
Find by		
• Ag Person	Personnel No. 10000195 Pers.Assgn 99999999 10000195 (1)	
 M Collective search help 	Name Jane UNHQ1-17 NAT Spanish Emp. Stat Inactiv.	
• In Search Term	EE Group X Non Staff no Payroll US00 New York	
- In Pree search	EE Subgrp XA Create Index Number	
	Start	
	Personnel Actions	
	Action Type Personn EE group EE subg	
	Separation Pre Reinstatement	
	Change Org Unit.	
	*** NON STAFF ***	
	Pre Boarding Non Staff	
	Enter Non-Staff no PY/External	
	Enter Miltary/Police Person	
	Enter Non-Staff on PY	
	Enter Separated s/m	
	Maintain All Non-Staff	
	Exit Al Non-Staff	
	Enter Benefits Admin. Retiree	
	Enter Benefits Admin. Surv/Oth	
	Maintain Benefits Admin. Prsn	
	Exit Benefits Admin. Person	

Click image to open expanded view



- 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.
- <u>Actions (0000):</u>
- Personal Data (0002):

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- <u>Create Addresses (0006):</u>
- Create Contract Elements (0016):
- Create Personal IDs (0185):
- Create Security/ Medical Clearance (0487):
- Create Communication (0105):
- Change Entitlement Monitoring (9003):



Upon receipt of the <u>HR Mini Master form</u>, perform the following steps:

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

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	Reappointment After Retirement			
	Reappointment w/o Break			
	Reinstatement			
	Renewal/Extension of Appt			
	Conversion of Appointment			
	Change in Category			
	Change in Level for ST Lang			
	Change in Contract Elements			
	*** MOVEMENT ***			
	Promotion			
	Transfer		-	
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Click image to open expanded view

- 4. After entering the personnel number, click the **Enter** sicon 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).

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A Free search	EE Group E External	CH00 Geneva			
1.007.001.00000000	EE Subgrp E2 Meeting Participant				
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conn.				_	
	Personnel Actions			100	
	Action Type	Personn EE group	EE subg		
	*** APPOINTMENT ***				
	Pre Boarding				
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	Reappointment After Retirement				
	Reappointment w/o Break				
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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

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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** \bigcirc icon.

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rsonnel No. 10000856 Pers.4			
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Pre Boarding Non Staff			
Enter Non-Staff no PY/External			
Enter Miltary/Police Person			
Enter Non-Staff on PY			
Enter Separated s/m			
Maintain All Non-Staff			
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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

- The <u>(blank) *Infotype Copy Actions (0000)*</u> screen appears. Click the Matchcode icon in the Reason for Action field.
- 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.

7 Infotype Edit Goto Extras System Help	/
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Additional actions Start Date Act. Action Type Act. Reason for action	
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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***.

Capy Actions (D000) Capy Acti
EE Group EE Determine
Status 6 R/RE Long to UH 7 A form by UH Apency Cutomerspecific V B softs Prophymett Nations H Mary/Neis
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Employee subgroup (A) Test in the Payrol Employee subgroup (A) Create Index Number Additional actions
Start Date Act. Action Type ActR. Reason for action 12 Entrees found

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. 7.	Click the Matchcode	icon in the <i>Employee subgroup</i> field. yee Subgroup from the list E.g. Consultant .		
8.	Click the Enter \bigotimes icon to confirm the record validity.			
9.	Click the Save unit	<pre>b to save the record.</pre>		

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)*.



3.3.2. Infotype Personal Data (0002) Procedures

- After completing the Actions (0000) infotype, the <u>(blank)*_Infotype Copy Personal Data</u> (0002)_* screen appears. Review the pre-populated data derived from the Index Number record and update the fields, if necessary.
- 2. Click the **Enter** \bigotimes icon to confirm the record validity.
- 3. Click the **Save** \blacksquare icon to save the record.

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Copy Per	sonal Data (0002)				
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Name					
Title	Mr 💌	Name Format			
Last name	MASHA	Birth name			
First name	Hashem	Second Name			
Middle Name	Isuf	Initials			
HR Data					
Date of Birth	31.01.1985				
UN National	Lebanese 💌	Othr/Birth	• •		
Marital Status	Unkn_ 💌	Since	Dependents		
Additional Field:	\$				
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Gender	Male 💌				
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4. The screen for the next infotype appears (blank)_*Organizational Assignment (0001)*_

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3.3.3. Infotype Organizational Assignment (0001) Procedures

- After completing the *Personal Data (0002)* infotype, the <u>(blank)_*Infotype Copy</u> <u>Organizational Assignment (0001)*</u> 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 nonstaff 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** \bigotimes 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 (000)	1)	
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8. After clicking the **Save** licon, the Subtypes for infotype "*Addresses*" pop-up screen appears. Double-click **Mailing Address *from the list.**

subtypes for motype Addresses (1) 7 Endles found		
Restrictions		
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Maling Address Permanent Address Emeroperic Contact	. Stat_ Inactiv_	
Duty Station TDY Address		
Tax Purposes		
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7 Entries found Employee subgroup IXI Consultants Additional actions Start Date Act. Action Type Act	Reson for action	

*Click image to open expanded view

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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 nonstaff and make the record available to issue a meeting participant's contract or initiate travel.

9. The screen for the next infotype appears, Create Addresses.



- 1. After completing the *Organizational Assignment (0001)* infotype, the <u>(blank)_*Infotype</u> <u>Create Addresses (0006)*</u> screen appears. Populate the data in the different fields.
- 2. Click the **Enter** \bigotimes icon to confirm the record validity.
- 3. Click the **Save** 🔙 icon to save the record.

🗟 🗟 🧟 Forei	in address		
Pers. No. 1000 Name Hashem Isuf I	856 Pers.Assgn 99999 ASBA NA	999 10000856 (1) 💌 😭 I Lebanese Emp. Stat Inactiv	
EE Group X Non S EE Subgrp XC UN A Start 26-01-20	taff no Payroll US00 New York encies IC/SC App	Non Active Status	
our contract	<u></u>		
Address			
Address type	Mailing Address	•	
Address line 1	37 monica street		
Address line 2			
City/county	California		
State/zip code	CA 9	0001	
Country Key	USA 👻		
Communications			
Communication			

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Click image to open expanded view

4. Click the **Save** licon, the Subtypes for infotype "*Addresses*" pop-up screen appears.

Infotype Edit	Goto Extras System Help	
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Address		
Address type	Mailing Address	
Address line 1	37 monica street	
Address ine 2		
City/county	California	
State/zip code	CA 90001	
Country Key	USA 👻	
Communications		
Communication		
Start date after int	al entry date (25.01.2016)	D T1E (1) 510 V unrantianno2 BIS
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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.

Subtypes for	Hiotype Addresses (1) 7 En					
Restriction	IS					
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Permanen	t Address			Stat Inactiv_		
Emergeno	y Contact					
Duty Stat	ion					
Tax Purpo	ess 3685					
Family Ad	dress (Prior DS)					
			-			
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7 Entries fou	nd					
7 Entries fou Employee s	nd Jobroup XII Consultan	ts				
7 Entries fou Employee s	nd bgroup X1 Consultan	ts				
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7 Entries fou Employee s Additional as Start Date	nd degroup XI Consultan tions A.t. Action Type	ts ActR	Reason for acton			
7 Entries fou Employee s Additional as Start Date	nd bgroup XI Consultan tions Act. Action Type	ts ActR	Reason for action			
7 Entries fou Employee su Additional au Start Date	nd jogoup XI Consultan tons Act. Action Type	rts ActR	Reason for action			
7 Entries fou Employee s Additional ad Start Date	nd degroup XI Consultan tons Act. Action Type	ts ActR	Reason for action	-		



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 <u>Infotype Create Contract Elements</u> 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.

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

Create Contract Elemen	nts (0016)		
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Create Contract Element	s (0016)		
🔊 💽 🧟 📔 Maintain activities			
No. 10000856 iame Bashem Tauf MASRA EE Group XI Non Staff no Payroll EE Subgrp XC UN Agencies IC/SC start EGassatotic To	Pers.Assgn 99999999 10000856 (1) NAT Lebanese US00 New York Appt Non Active State 31.12.9999	Emp. Stat Inactiv_	
Contractual Regulations			
Contract Type Non-staff O	thers Valid Until		
Additional fields Rules Series ID Status ID Recruitment. Indicator Contract Status Contract Term	V No V		
Contractual Payment Status Order	Prorated		
Remarks			

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



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

☑ Infotype Edit	t Goto Extras System Heb
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Create Pers	onal IDs (0185)
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Pers. No. 10	000856 Pers.Assgn 99999999 10000856 (1) 👻 💱
Name Hashem Isu:	f MASHA NAT Lebanese Emp. Stat Inactiv_
EE Group X No	n Staff no Payroll US00 New York
EE Subgrp XC UN	Agencies IC/SC Appt Non Active Status
From 26	.01.2016 to 31.12.9999
0	
Personal IDs	Decembra
ID type	Passport
ID number	78364734
10 110110-01	
Date of issue	01.05.1998
Valid to	31.05.2018
Place of issue	new york
Country of issue	
	SAD D TIE (1) 510 V unsaptleapp2 INS # 🔄

Click image to open expanded view



1. After completing the Contract Elements (0016) infotype, the Infotype Create Security /

Medical Clearance screen appears. Click the Matchcode icon in the Clearance Type field.



2. In this case, double-click **MCLR Medical Clearance** on the "*Type of Clearance*" pop-up screen.
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|--|---|--|
| Create Security/ Medical Clearance (048) | 7) | |
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tana li anthe III AL | 99 1000055 (1) V V
LCance Dro. 5.47 BetX.
100 100 V V V V V V V V V V V V V V V V | |
| | | |

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

P HB master data Edit Goto Environment System Help	
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Create Security/ Medical Clearance (0487)	
a a a	
Pers. No. 10000561 Pers. Assgn 99999999 10000556 (1) IV Non-Resident Turt MORAL No. Lobensee Emp. Stat. Inact/v Emp. Stat. Inact/v Et sobgn Et sobgn Et sobgn Et sobgn En sobgn Inact/v Et sobgn XL Isbanese Emp. Stat. Inact/v Et sobgn Et sobgn Et sobgn Inact/v Et sobgn XL Isbanese App. Non Active Status App. Non Active Status App. Non Active Status	
Berance Type (MTLR)	
Clearance Category 03	
Application Status	
Reference Number	
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SAV	V T1E (1) 510 • Unsapt1eapp2 INS V -> dia

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 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.



Last modified: 15 August 2021

3.3.7. Infotype Create Communication (0105) Procedures

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

Infotype Edit Goto Extras System Help	
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Conv Communication (0105)	
copy communication (0103)	
40 Da 🚨	
Pers. No. 10000856 Pers.Assgn 99999999 10000856 (1)	
Name Hashem Isuf MASHA NAT Lebanese Emp. Stat Inactiv	
EE Group X Non Staff no Payroll US00 New York	
EE Subgrp XC UN Agencies IC/SC Appt Non Active Status	
Start 26.01.2016 0 to 31.12.9999	
Access to blog	
Communication	
Type MAIL Personal Email Address	
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Click image to open expanded view



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

- After completing the Create Communication (0105) infotype, the <u>Infotype Change</u> <u>Entitlement Monitoring</u> screen appears. Click the **Action Completed Flag** drop-down.
- 2. Select **Yes** from the list.

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Change Entitlement Me	onitoring Infotype (9003)	
la 🔒 🧟		
Pers. No. 10000856 Name Bashem Isuf MASHA EE Group X Non Staff no Payroll EE Subgrp XC UN Agencies IC/SC	Pers.Assgn 99999999 10000856 (1) NAT Lebanese Emp U300 New York Appt Non Active Status	p. Stat. Inactv.
Personnel Artion Datals	12.04.2016 Chinga 25.05.2016 HITRAINOU	01
Subtype Action / Reason Effective Date Action Reason Initiated / Last Update Date Initiated / Last Update By	0302 Personnel action monitoring (2001) 12.044-0204 CAL Enter Non-Staff no PY/External CAL Enter Non-Staff no PY/External CAL Enternal Person EG-E 25.05.2016 H1TRAIN001	
Action Completion Status Action Completed On Action Completed Flag	25.05.2016 Yes	
Remarks	No	
Data hidden by screen modification	ins SA	

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

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Change Entitlement M	Nonitoring Infotype (9003)
la 🕼 🧟	
Pers. No. 10000856	Pers.Assgn 99999999 10000856 (1)
Name Hashem Isuf MASHA	NAT Lebanese Emp. Stat Inactiv
EE Group 🛛 Non Staff no Payro	oli US00 New York
EE Subgrp XC UN Agencies IC/SC	C Appt Non Active Status
Start 12.04.2016 To	12.04.2016 Chngd 25.05.2016 HITRAIN001
Personnel Action Details	
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
Initiated / Last Update By	H1TRAIN001
Action Completion Status	
Action Completed On	25.05.2016
Accord completed on	

Click image to open expanded view



An HR Mini Master Record has been created.



Last modified: 1 November 2021

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 <u>Global Index Requestor Role in Umoja</u> for steps on Searching and Requesting an index number.



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 <u>HR Mini Master form</u>, 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.



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



• • • •		1111	
Fast Entry for Actions			
>			
	7		
m [<u>17.06.2016]</u> _	J		
m <mark>17.06.2016]c</mark> Yersonnel Actions	Darrons SE group SE who		
m <mark>17.06.2016]C</mark> Personnel Actions Action Type Enter Non Staff for Travel	Personn EE group EE subg		

Click image to open expanded view

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

5. Click the* Execute* 🕒 icon.

Fast Entry for Actions						
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Personnel Actions						
Action Type	Personn	EE group	EE subg			
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Click image to open expanded view

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

🖙 HR Master Da	nta Edit Goto System Help
0	
SAP	
•	
Start Date	17.06.2016
Reason f.Action	
EE group	E EE subgroup E2
Personnel area	Pers. subarea
Title	🗠 💌 Gender 🛛 unknown 💌
Last name	[K]
First name	ß

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

🖻 Reason for Action (1) 2 Entries found	
Restrictions	_
Action Type: CB Name of action type: Enter Non Staff for Travel	
ActR ⁴ Name of reason for action	
E2 Meeting Participant E/E2	
IK Contingent M/MH-MS	
2 Entries found	

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



EEGrp	Name of EE group	
1	International Staff	
2	Local Staff	
3	Conf Language Staff	
4	WAE Staff	
5	Special Staff	
6	R/NR Loan to UN	
7	Admin by UN Agency	
в	Benefits	_
E	External	
м	Military/Police	•
x	Non Staff no Payroll	
Y	Non Staff on Payroll	

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:

E2 Meeting Participant E/E2E ExternalE2 Meeting ParticipantTR Contingent M/M Military/M4 Formed POL unit EPU M5	Reason for Action	Employee Group	Employee Subgroup
TR Contingent M/ M Military/ M4 Formed POL unit EPU M5	E2 Meeting Participant E/E2	E External	E2 Meeting Participant
M4-M5 Police Mil.Contingent/Troop	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.

HR Master Da	ta Edit Goto System Help
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Personnel area	US00 Pers. subarea
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Last name	C
First name	C
Middle name	
Birth date	C UN Nationality Marital Stat. Unknwn 🕶



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	CGrpg	
TJ00	Tajikistan	1000	UN	
TL00	Timor-Leste	1000	UN	
TM00	Turkmenistan	1000	UN	
TN00	Tunisia	1000	UN	
тооо	Tonga	1000	UN	
TR00	Turkey	1000	UN	
тт00	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.

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EE group	E EE subgroup E2
Personnel area	US00 Pers. subarea
Title	Gender unknown *
Last name	
First name	C.
Middle name	
Birth date	C UN Nationalty Marital Stat. Unknwn 💌



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.

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- *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**.

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0060 Data Line 0077 Telex Line 0080 Satellike Phone 0090 Dect Phone 0010 Trunking Radio 0011 Pension system ID Num	U003	Radio Call Sign	
1007 Telex Line 1009 Dect Phone 1009 Dect Phone 1010 Trunking Radio 1011 Pension system ID Num	U006	Data Line	
J008 Satelite Phone J009 Dect Phone J010 Trunking Radio J011 Pension system ID Num	U007	Telex Line	
J009 Dect Phone J010 Trunking Radio J011 Pension system ID Num	800U	Satelite Phone	
J010 Trunking Radio J011 Pension system ID Num	U009	Dect Phone	
J011 Pension system ID Num	U010	Trunking Radio	
	U011	Pension system ID Num	

- 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.



- w. Type the cell number of the personnel in the *Number* field. In this case, type **0034892371094**.
- x. Click the **Execute** ⁽¹⁾ 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:



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	 It is used to make the major changes in the Mini Master. These major changes include: 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	It is used to make the minor changes in the Mini Master. These minor changes include: 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.



- 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.)*

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Click image to open expanded view

9. The <u>Change Addresses</u> 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** sicon to confirm the record validity.
- 12. Click the **Save** \blacksquare icon.

Change Addresses (0006)		
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Click image to open expanded view



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 Sicon.

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

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	SAP	4

- 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

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	Basic Data Contract Data Y Payroll Data Y Time Data Benefits Data S () C Infotype text S Actions Period Organizational Assignment C Period From To Period	

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

Pers. No. 1000 Name Hashem Isuf EE Group E Exte EE Subgrp E2 Meet	MASHA	Pers.Assgn	31015626	10000856(1)	-	2
From 01.0	mal ting Participant 02.2016 to	0500	New York	org DESA	Emp. Stat In	uactv
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Date of issue	01.02.2016					
Valid to Place of issue	30.09.2016 Rome, Italy	1	_			
Country of issue	USA	•]				
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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.

- 8. Click the Enter \bigotimes icon to confirm the record validity.
- 9. Click the **Save** \blacksquare icon to save the changes made to the Infotype Personal IDs.

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Create Personal IDs (0185))	
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M Search Term M Free search	From 01.02.2016 to	30.09.2016
	Personal IDs	
	ID type G4 Visa	•
	ID number 5432145	



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

	Pamby Member/Dependents OAI Documents on Dependents From curr.date Addresses ✓ Bank Details ✓ Contract Elements ★ Montoring of Tasks ★	
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Record created		ହୁଏ

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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 <u>Infotype Personnel IDs</u> and press the Enter key.

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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**.



7. Click the **Display** icon.

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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.

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	Vaid to Place of issue	Rome Italy			
	Country of issue	USA ·			
				-	



Last modified: 3 November 2021

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.

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

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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.

Infotype Edit Goto Extras Syst	em Help	
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Additional actions		
Start Date Act. Action Type	ActR Reason for action	
02.09.2014 04 Create Index Number	01 Create Index Number	
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Click image to open expanded view



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.

² Infotype <u>Edit G</u> oto Extrgs System <u>H</u> elp	>	
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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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Title	Ms 💌	Name Format	
Last name	UNHQ1-17	Birth name	
First name	Jane	Second Name	
Middle Name		Initials	
HR Data			
Date of Birth	01.05.1980		
UN National	Spanish 👻	Othr/Bith	
Marital Status	Single 💌	Since 01.05.1980 Dependents	
Additional Fields			
Oty of Bith	Valencia		
Country of Birth	Spain	•	
Gender	Female		

Click image to open expanded view



7.1.4. Addresses (0006):

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



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.

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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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Country of issue	USA	-					



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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Remarks		

Click image to open expanded view



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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Personnel Action Details		
Subtype	0302 Personnel action monitoring	
Action / Reason	CA01	
Effective Date	03.09.2014	
Action	CA Enter Non-Staff no PY/External	
Reason	01 External Person EG=E	
Initiated / Last Update Date	12.01.2016	
Initiated / Last Update By	INSTRUCTOR01	
Action Completion Status		
Action Completed On		
Action Completed Flag	No 🔻	
Remarks		

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