Umoja Onboarding

1 — Last update: 29 December 2023

United Nations - DOS

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1. What's New!

The topics listed below provide an overview of what's new in the online version of the Onboarding in Umoja iManual since its original publication on 23-03-2022. Content throughout this manual has been expanded, revised or is new.

Initial Publication 23 March 2022



1.1. Initial Publication

The content in this manual is based on a conversion of the PDF manual last updated on 27.04.2016. The following changes to that content are incorporated in this manual:

- Updated processing of Preboard Request Medical Clearance
- Updated processing of IT04787
- Updated processing of IT3344

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2. About this Manual

This is a living document and the contents are subject to change as changes are made to **HR Policies, Procedures and Processes**. Though you may print the document for your convenience, **ONLY** this online document is considered the authoritative source for **HR Procedures and Processes**. This is a replacement of the current PDF Umoja Job aid which were used for Umoja Go Live.

Before you proceed with this Manual, we are assuming that you are already aware of the basics of Umoja. It will be helpful if you have some exposure to the HR functions normally conducted in the United Nations.

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3. About Onboarding

Onboarding is the final administrative process of filling a position with a selected candidate resulting in the granting of a new appointment. Once the offer of appointment is made and the selected candidate accepts it, arrangements are made so that the selected candidate may commence the appointment on a mutually agreed upon date.

This guide has been compiled to serve as a reference tool for the implementation of Umoja. It includes consolidated information regarding the onboarding phase. The topics covered herein are:

- Initial Appointment Fixed Term International
- Initial Appointment Temporary International
- <u>Reappointment Fixed Term International</u>
 - Reappointment of a Former staff member separated in IMIS
 - Reappointment without a Break Fixed Term International
 - Reappointment of Incoming UN Common System International
- <u>Reappointment Temporary International</u>
 - <u>Reappointment of Former staff member neither retiree nor language</u>
 - Reappointment after Retirement Temporary International
 - Reappointment PA Language Daily International
 - Reappointment after Retirement PA WAE Language
- Initial Appointment Fixed Term Local
- Initial Appointment Temporary Local
- <u>Reappointment Fixed Term Local</u>
 - Reappointment without a Break Fixed Term Local
- <u>Reappointment Temporary Local</u>
- <u>Special movements Secondment, Transfers, and Loans from Common System</u>



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3.1. Scope

This document covers prerequisite documents/actions, provides step-by-step processes and procedures an HR Partner must know to accurately administer end-to-end onboarding transactions for selected candidates who will be granted a temporary or a fixed-term appointment in Umoja. It also references policy which you must review for guidance. You can click on the Knowledge Gateway icon below to go to the guidance portal.





3.2. About Onboarding Requests

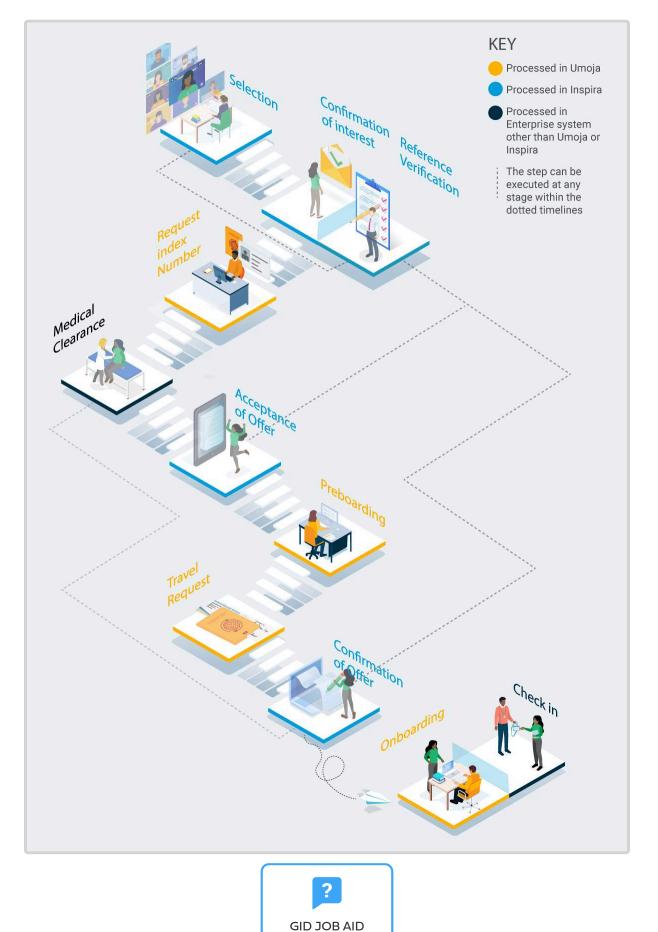
This manual aims to provide everything you need to process various types of onboarding requests that require processing in Umoja and provides all the prerequisites and procedures for each request type. Policy reference has been included for each request type, so that the documentation for each request type stands on its own. Prerequisites have been provided for each request type, enabling you to focus on the instructions in the appropriate chapter with minimal cross-referencing to external documents.



3.2.1. Stages of Onboarding Progress

Umoja onboarding refers to the period of time starting from when the offer has been confirmed for a temporary or fixed-term appointment. This assumes all clearances have been granted (reference checks and medical) and the staff member is about to travel to the duty station or, if there is no travel, to report on the first day. However please note that as part of the onboarding process, Umoja must be used to request index number and *inspira* <u>Offer Management Module</u> must be used to request medical clearance. Please refer to the <u>Medical Clearance procedures</u> in this manual, and the procedures in the <u>Global Index Number Requestor iManual</u>. With this caveat, the Umoja onboarding workflow can be said to begin right after the time when the *inspira* Offer Management has been completed.

Onboarding contains several steps and involves the use of multiple systems. The workflow also involves both an on-line and off-line work.



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3.2.2. Processing Onboarding Related Requests

Onboarding is not a static activity but a process. It encompasses all the administrative procedures required up to the point the selected candidate's data is in Umoja and he or she is created as an active staff member allowing for proper administration. Therefore, processing onboarding-related requests should follow a clear process, which this guide emphasises throughout.

The best practice for each request type is to follow the direction of the guide:

- 1. Review the policy and practice for the request type
- 2. Review the prerequisite documentation
- 3. Review the procedures for processing the approval of the request type
- 4. Follow each procedure to conclusion
- 5. Carefully review and approve the request in Umoja

You are strongly urged to develop a good practice of following this process and completing each activity and procedure in the order required. Procedural steps will require you to enter data in fields, select from dropdown lists, and turn indicators on or off. These steps should be followed according to the rules defined in this guide, which emphasize the policy and practice framework.

While it is often possible to move a Personnel Action (PA) forward by entering any value in a field, the resulting errors can lead to erroneous information being entered into the system. Rescinding PAs is a complicated process in Umoja and should be avoided whenever possible, as it will lead to significant delays in the processing of vital staff member's entitlements or even salary. Erroneous information can also lead to incorrect payments to staff members, and complicated recoveries.

If you are uncertain of the rules governing data entry for a PA and this guide cannot provide answers, stop work and seek guidance from an experienced HR Partner.

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4. Offer Management Procedures

Offer management procedures that must be completed prior to executing any appointment or reappointment include:

- Requesting a new, or Confirming the use of an existing Index Number (refer to the "GID job aid" for more information).
- Preboard Request Medical Clearance
- Confirm MSD has cleared the applicant
- <u>Record Medical Clearance with Physician's Statement</u>
- <u>Record Security Clearance</u>





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Preboard Request Medical Clearance

Medical Clearances – ST/Al/2011/3

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

Medical clearance conducted as part of the onboarding process is requested through the *inspira* <u>OM Module</u>. As part of the OM workflow, medical clearance for the following medical clearance types can only be initiated in inspira:

- Change of Duty Station
- Pre-recruitment
- Type of Job

Medical clearance through Umoja can only be raised for the following medical clearance types (all other medical clearance types – while visible- are disabled in Umoja):

- Non-inspira recruitment/movement
- Extension beyond retirement
- Extension of appointment

The Umoja medical clearance type "non-inspira recruitment/movement" is for OM cases where candidates have not been selected through inspira, e.g. lateral reassignments under the authority of the Head of Entity or placement of staff under the authority of the ASG OHR, to name a few.

As a result of improvements to the interface between Umoja and EarthMed, additional information is required when submitting Medical Clearance requests. <u>Infotype 0487</u> (Security/ Medical Clearance) now includes a Duty Station field, which must be completed with the personnel subarea code for the duty station at which the staff member will be working. This field is required for both onboarding and change of duty station medical clearances.

- Follow the Preboard Request Medical Clearance procedure documented in the <u>Onboarding job aid</u> for all *inspira* recruitments. For non-*inspira* recruitments/movements, extension beyond retirement and extension of appointment update the staff members' records in Umoja.
- 2. On infotype 0487 select MCLR for Clearance Type, and the values for Clearance Category and Application Status appropriate for the Staff Member you are processing; and enter or search for the Duty Station (Personnel Subarea) at which the Staff Member will be working. When searching using the Duty Station Text field, the * wild card character can be used.



It is mandatory to complete this field even though you can currently validate and save the record without providing a value for Duty Station. A change making Duty Station a required field is pending.

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Confirm MSD has Cleared the Applicant

To confirm that MSD has cleared the applicant, use PA20 to display <u>infotype 0487</u> (Security/ Medical Clearance). When cleared, EarthMed will update Umoja with the date of clearance and the EarthMed ID for requests initiated in *inspira* and in Umoja.

The most recent clearance records will be shown on infotype 0487.

As per the provisions of <u>ST/AI/2011/3</u> on Medical Clearance, medical clearances are normally valid for one year from the date of issuance.

When viewing IT0487 using PA20:

Clearance Type	MCLR Medical Clearance
Clearance Information	
Clearance Category	01 Pre-Recruitment
Application Status	M2 Medical: Fit
Reference Number	00775038160115021325
Remarks	
s/m being recruited on	a 2 year FTA in DGACM/DD/STS

- For medical clearances issued by Medical Services and updated in Umoja via EarthMed
 - Start date Date the HR Partner submitted the request for medical clearance
 - Chng (date) Date MSD issued the clearance
- For medical clearances based on a certificate issued by a medical practitioner and recorded manually by the HR Partner in Umoja,
 - Start date represents the issuance date of the clearance.
 - Chng (date) field does not appear.

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Record Medical Clearance

For medical clearances that are not automatically updated in Umoja from EarthMed, you must use PA30 to record the clearance, e.g., a physician's certificate of health. As per the provisions of <u>ST/AI/2018/4</u> on Medical Clearance, medical clearances are normally valid for three months from the date of issuance, and for the duty station and job type for which it was granted. This date of issuance is used as the effective date for the medical clearance record.

To record such medical clearances manually, follow the procedures for <u>Preboard Request</u> <u>Medical Clearance</u>, but

- Use the issuance date of the certificate of health as the effective date. Enter this date in the Start text box on infotype 0487, (Security/Medical Clearance) and
- Select M2: Medical: Fit for Status of Clearance.

Status	Status Description
B1	Background: Received
B2	Background: Verified
B3	Background: Pending
B4	Background: Unconfirmed
B5	Background: Not Verified
M1	Medical: Requested
M2	Medical: Fit
M3	Medical: Not Fit
M4	Medical: Pending Clearance
S0	Security: Not ready for clearance submission
S1	Security: Ready to be sent for security clearance
S2	Security: Sent to department of security & safety
S3	Security: Cleared
S4	Security: Denied

For Temporary Appt < 6 months:

- Initial Appointment for < enter # of days/months > period.
- Physician's statement dated < enter date > from personal medical doctor received.
- Medical certificate will be valid for one year from the date on the statement < enter validity period >.

For Temporary Appointments where a doctor's note is sufficient:

• Type medically cleared in the remarks section and reference the doctor's note with date for record purposes.

For Initial Appointment regardless of duration:

• Requires medical clearance, as determined by the United Nations Medical Director.

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Record Security Clearance

Security clearance must be obtained prior to starting travel. Use PA30 to record new security clearance(s) prior to executing an onboarding PA.

This infotype will appear during the execution of onboarding PAs (initial appointment, reappointment) to allow you to record the status of the security clearance at the time of onboarding. If security clearance was not entered prior to the execution of the onboarding PA, you may follow the instructions starting in step 6 below.

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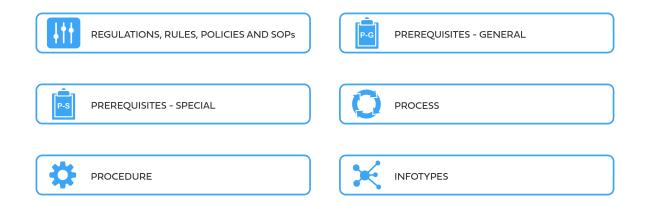
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5. Initial Appointment – Fixed Term (International)

Before proceeding you should become familiar with the following information:



When a newly recruited staff member arrives at the duty station following a recruitment via the *Staff Selection System* including review by a **Central Review Body** and the person has never worked for the Secretariat before, an **Initial Appointment Personnel Action** must be completed. This Personnel Action (PA) creates a record of the staff member's data in Umoja enabling him or her to receive salary and emoluments at the category, grade, and step under the terms and conditions of service in the offer of appointment.

The first step in the process is to ensure that the selected candidate has an Index Number, which should have already been requested at the time of the offer management. If, however, you have not yet requested an Index Number for the new Staff Member (refer to the "GID job aid" for more information).





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International

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of international fixed term initial appointments and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Article IV Appointment and promotion Staff Regulation 4.1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.5: Staff in posts subject to international recruitment

Staff Rule 4.11: Types of appointment

Staff Rule 4.13: Fixed-term appointment

Administration of Fixed Term Appointments – ST/AI/2013/1

Rules in setting the EOD dates

"Medical Clearances – <u>ST/AI/2018/4</u>

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> Pension Fund – JSPB/G.4/Rev. 24

Article 21: Participation

Young Professionals Programme Roster

Young professionals programme – ST/AI/2012/2/Rev.1

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Section 3: Conditions applicable to external candidates who are successful in a competitive language examination

Young professionals programme – ST/AI/2012/2/Rev.1/Amend 1

Section 7: Selection and appointment of successful candidates

Language Examinations Roster

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5.2. Procedures

Use the following procedures to:

- Preboard PA
- Add Household Member
- Initial Appointment Fixed Term International
- Secondment, Transfers, and Loans from Common System



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5.2.1. Initial Appointment – Fixed Term

As best practice, familiarize yourself with the following infotypes used in this procedure.

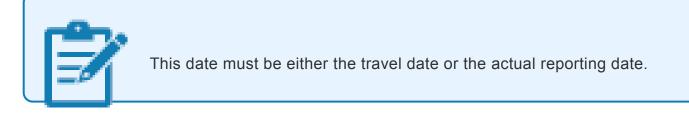
Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.



- 2. Click 🕑 button
- 3. Enter the staff member's Index Number in the *Personnel No*. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box.
 - b. Click \square to display the list of options for the Reason for Action.

Personnel Action	s		
Ø			
Find by Alignment of the search of the	Personnel No. Pers Start	s.Assgn	
fill Free search	Personnel Actions		
	Action Type	Personn EE group	EE subg
	*** APPOINTMENT ***		-
	Pre Boarding		· ·
	Initial Appointment		
	Reappointment		
	Reappointment After Retirement		
	Reappointment w/o Break		
	Reinstatement		
	Renewal/Extension of Appt		
	Conversion of Appointment		



- 4. Click 🕑 to validate entries.
- 5. Click W to execute the action.



6. Click \square to display the list of options for Reason for Action.

Personnel action		
Action Type	Initial Appointment	
Reason for Action		

- 7. Click Initial Appointment to Select.
- 8. Click \checkmark to confirm selection.

🔄 Rea	son for Action (1) 20 Entries fou	nd
R	estrictions	
	▋▓▓▓▓▓₽₽₽	
	Type: 05	
Name o	of action type: Initial Appointment	
ActR	Name of reason for action	
01	Initial Appointment	
04	Interagency Transfer	
07	Interagency Rem Loan	
10	Interagency Non Reimb Loan	
11	Secondment (incoming)	
30	*** Only For Temp Appts ***	
31	Emerg Surge Natural Disaster	
33	Emerg Surge Conflict/Violence	
35	Seasonal/peak work requirement	
37	Replacement on Special Leave	
39	Replacement on Sick Leave	
41	Replacement on Maternity Leave	
43	Replacement on Paternity Leave	
45	Replacement on Temp Assign	
47	Temp Appt Pending Selection	
49	Special Project Finite Mandate	
51	Temp Conf Language Staff	
53	WAE Conf Language Staff	
55	WAE non-Language Staff	
60	Others	



Reasons for Fixed-Term Appointments are restricted to reasons 01 to 11 inclusive.DO NOT select any reasons 30 to 60 for fixed-term appointments.

Initial Appointment

Used for initial appointments that are not the result of Interagency transfer, secondment or loans.

Interagency Transfer ()

Used for Staff Members who are appointed as a result of an interagency transfer.

Interagency Rem Loan

Used for Staff Members who are appointed as a result of an interagency reimbursable loan.

Interagency Non Reimb Loan ()

Used for Staff Members who are appointed as a result of an interagency non reimbursable loan.

Secondment (incoming)

Used for Staff Members who are initially appointed as a result of an interagency incoming secondment or as a result of a secondment from a government.

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Organizational assignment		
Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above
	Concerned C	

a. Click 🧭 to validate entry.

10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.

Organizational assignme	nt	
Position	310173	20 P3 1102 ADMINISTRATIVE OF
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

	If the position remains 9999999, or does not have funding, the Staff Member will not be paid.
	a. Click 🕑 to validate entry.
11.	ick ⊟ to save the record

12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.

🖻 Infotype	<u>E</u> dit <u>G</u> oto	Extras	S⊻stem	Help			
0		• « 日	😞 😒	👷 I 🖨 🕅	KI20.	G 🕄 I 🛱 🗖	🕜 🖳
Copy Pe	rsonal Dat	ta (000	2)				
🗟 🗟 🧟							
Pers. No.	10001118		Pers.Assgn	9999999	9 10001118	•	V
Name				NAT	British	Emp. Stat	Active
EE Group	International	Staff	USOO	New York	Org D	M OUSG	
EE Subgrp	R Professional 8	k Above					
Start		Это з	1.12.9999				

• Infotype 0002 (Personal Data) is populated with the information from the current Personal

Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.

- Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
- For example, if the staff member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

- a. Click 💟 to validate entry
- 13. Click \blacksquare to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype IT0000</u>.
 - Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

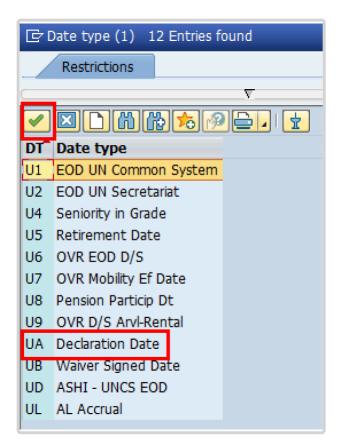
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \square to save the record.
- 16. For a Fixed-Term appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date for the Staff Member as per the current rules in force. [ddmmyyyy, the date Staff Member will turn 65 if appointed after 01.01.2014]
 - U1 EOD UN Common System [ddmmyyyy] ⁽¹⁾
 - U2 EOD UN Secretariat [ddmmyyyy] (1)
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click **UA Declaration Date** to select.
- 18. Click 🗹 to confirm the selection.
- 19. Enter the Declaration date in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select **Fixed Term** option from the dropdown list for Contract Type.

Contractual Regulations			-
Contract Type	Fixed Term	-	Valid Until
	Fixed Term	*	T
Additional fields	Consultant	*	
Rules Series ID	Ind. Contractor		-
Status ID	UN Volunteer UN Police Officer		-
Recruitment. Indicator	Military Observer		•
Contract Status	Staff Officer	111	
Contract Term	Non-staff Others Govt Provided Person		-
Contractual Payment Stat			•
	Non Active Status	*	L
0	Not Applicable	٣	r
Remarks			



For purposes of onboarding staff, HR partners should select only from the first three options:

- Continuing: for continuing appointments
- Fixed-term: for fixed-term appointments
- Temporary: for Temporary appointments
- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. Select the appropriate option as the method of recruitment from the <u>Status ID</u> dropdown menu.

Additional fields		
Rules Series ID	_	
Status ID	v	
Recruitment. Indicator	CRB recruitment	•
Contract Status	GS & Rel Recruit Exam YPP	-
Contract Term	NCRE [prior 2011]	*
Contractual Payment Sta	G to P [prior 2011] G to N [prior 2011] Prof Lang Comp Exam	~
Remarks	Top Echelon Appointment GS Competitive Exam Prof Lang Coord Exam Assoc Tran. Support Exam Lang Teacher Exam	

reference checks this option should be left blank.

If the Staff Member has been provisionally appointed pending the completion of

24. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Additional fields			
Rules Series ID		-	
Status ID	CRB recruit	ment 🔻	
Recruitment. Indicate	or	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Payment	Status Order	Prorated	•

25. Select the appropriate option for <u>Contract Status</u> from the dropdown menu.

Additional fields			
Rules Series ID		•	
Status ID	CRB recruit	ment 🔻	
Recruitment. Indicator		Yes	*
Contract Status			
Contract Term Contractual Payment Status Order Remarks		Expert	
		Geographical Language Limited Other Retiree Retiree - language	

- 26. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 27. Click 🗹 to acknowledge the message

글 Display Messages	
Ty Message Text	Det.
Start date after initial entry date (03.08.2015)	Q
Correct errors 🕄 🖓 🗞 * Technic	

- 28. Click 🔮 to validate values.
- 29. Click \square to save the record.
- 30. Click to select the <u>NPO Assignment Type</u> All initial appointments are **permanent movements**.

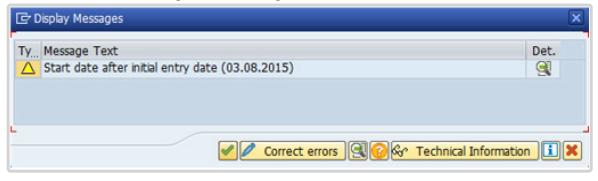
🔄 Infotype 🗄	dit <u>G</u> oto Extr <u>a</u> s	System I	<u>H</u> elp
	▼ « [i 🖶 🕅 🖄 i 🎝 🗘 🎝 🎝 i 🌄 🖬 🥥 🖳
Create NP	0 Assignment	(3344)	
la 🖓 🖓			



32. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.

Movement / Travel Rec	quirements	
Assignment requires ch	ange in Duty Station: Yes 	○ No
Shipment option	Unaccompanied Shipment (Assign/C	
Shipment details	RLG : \$15,000 @ Dependent rate	

- a. Click 🧭 to validate selection.
- 33. Click 🗹 to acknowledge the message



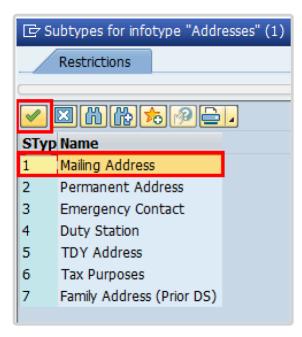
34. Click 🥙 to validate values.

🔄 Infotype 🛛 🛓	dit <u>G</u> oto	Extras	System	Help
	•] « 日	🔕 🐼	😪 🗁 🕅 🖄 । 🎗 🎝 🗘 🎝 💭 💭 🔜 📿 🖳
Create NP	0 Assign	ment (3	3344)	
🔊 🗟 🧟				

- 35. Click \blacksquare to save the record.
- 36. Count for Mobility should only be checked for a Staff Member hired on posts subject to international recruitment with an initial appointment, reappointment or assignment for one year or longer. Therefore, it should always be checked for a fixed-term initial appointment or reappointment as the minimum length for these appointments is 1 year. Non-removal entitlement: DO NOT CHECK
 - a. Click Solution to validate selections, you may have to click Solutions more than once to acknowledge messages at the bottom of the screen.

¢	Infotype	Edit	Goto		System	10
0			•] « 日	🔕 🙆	😪 🗁 🖄 🖄 । 🏝 🏝 🎝 🕽 🚍 🛛 🥥 🖷
4	Create N	IPO A	ssigni	ment (3344)	
-	象 🞝 ۱					

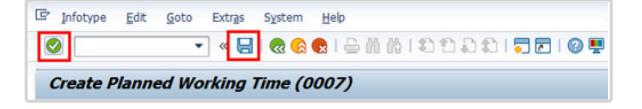
- 37. Click \square to save the record.
- 38. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.



a. Click 🗹 to confirm selection,

- 39. Enter the details of the Staff Member's mailing address.
 - a. Click 🕑 to validate selections,
- 40. Click \blacksquare to save the record.
- 41. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype.
- 42. Select the work schedule for this particular Staff Member. Most Staff Members will have a **Normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Please be sure to select a valid work schedule and verify that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 - no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this intotype as time evaluation will not run properly.



a. Click \bigotimes to validate selections, you may have to click \bigotimes more than once to acknowledge messages at the bottom of the screen.

- 43. Click 🔙 to save the record.
- 44. You **MUST** enter the Pay scale Group and Level information for <u>infotype 0007</u> (Planned Working Time) then **validate and save** or Payroll will **NOT** run for this staff member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

a. Click Solution to validate entries, you may have to click Solution more than once to acknowledge messages at the bottom of the screen.

3	Infotype	Edit	Goto	Wage types	Extras	System <u>H</u> elp
0			•] « 日 🛛	8	⊖ ∅ \$ 1 \$ 1 \$ 1 \$ 0 ∅ 0 0
0	create B	asic	Pav (C	008)		

- 45. Click \square to save the record.
- 46. In <u>infotype 0008</u> you indicate if the staff member is entitled to Pension participation. The following menu options are available for:

Fund Details Status	Schema
---------------------	--------

Contributing : If the Staff Member has an initial appointment of more than 6 months.	Standard Schema : This indicates the Staff Member is part of standard Pension Participation.
Non-Contributing : If the Staff Member has an initial appointment of less than 6 months.	SLWOP Schema : This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund.
Validating: Should not be used for Initial Appointment or Reappointment.	This should NEVER be selected for an Initial Appointment or Reappointment.

PF Number			Reason	
Fund Details				
Status	Contributing	*	Participation date	01.09.2015
Schema	Standard Schema	-		

The system automatically sets the Staff Member's status to Contributing because of their Fixed-Term appointment. Also, note that the Participation date is automatically generated by the system and cannot be changed.

a. Click 🥙 to validate the values.



- 47. Click \square to save the record.
- 48. You should record all passports and visas held by the staff member.



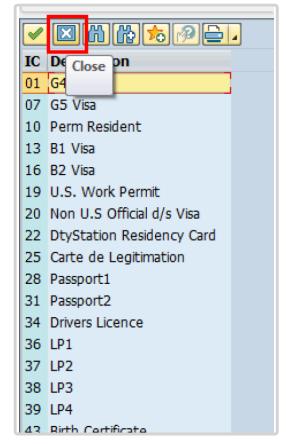
- 49. Click \checkmark to confirm selection.
- 50. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxx]
 - Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

- 51. Click \blacksquare to save the record.
- 52. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

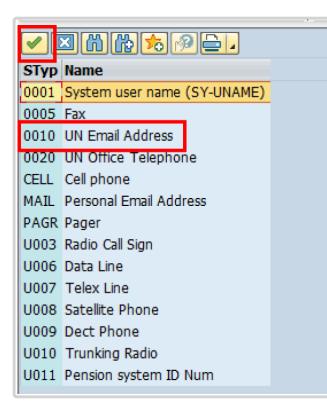
• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- 53. Minimally, you should record an email address for the Staff Member. Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone



- 54. Click \checkmark to confirm selection.
- 55. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 56. Click \blacksquare to save the record.
- 57. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 58. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of this PA will create a new, duplicate record in <u>infotype</u>

<u>0487</u> (Security/Medical Clearance) with a new effective date, the same as the effective date of this PA you are executing.

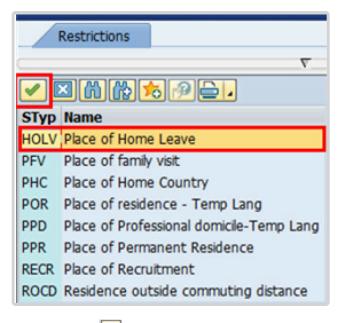
a. Click 🕒 to continue with the PA



- 59. For fixed-term appointments, you should minimally record the Staff Member's **Place of Recruitment**.
 - <u>NPO Entitlement Country and City Menu Key</u>

In the case of International Staff Members, you must record their Place of Home Leave or exceptionally, the Place of Home Country (see below) as the date on which it is established is one of the elements used to calculate the Staff Member's repatriation entitlement upon separation.

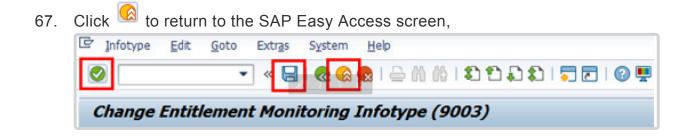
a. Click HOLV label



- 60. Click 🗹 to confirm selection.
- 61. Enter the Country [xxxxxx] and City [xxxxxx], and Airport Code [xxxx] for the place of Home Leave. Click on <u>World Airport Codes</u> to identify the airport code.

The place of home leave must be established for all international staff, even for those serving in the same country as their nationality.

- a. Click 🥙 to validate entry,
- 62. Click \blacksquare to save the record.
- 63. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click is to proceed to the next infotype.
- 64. Infotype 9003 (Entitlement Monitoring), the last in this PA, records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 65. Click 🥙 to validate entry,
- 66. Click 🔚 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.



You should execute a T-code PA20 to review the PA and <u>infotypes</u> to which you made changes in this transaction. Each Personnel Action completed should be documented by adding a note (T-code PA30) to the record saved on the <u>infotype 0000</u> (Actions).



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PRIVACY NOTICE

TERMS OF USE

Last modified: 15 December 2023

Infotypes Used

Infotypes found in Initial Appointment PAs

Infotype #	Description	More Info
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	(1)
0016	Contract Elements	
3344	NPO Assignment	
0960	NPO Mobility and Hardship Allowance	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	(1)
0185	Personal IDs	(1)
0105	Communications	
0487	Security/Medical Clearance	
3244	NPO Entitlement Country and City	1
9003	Entitlement Monitoring	

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.

Click on Infotypes below for a complete list.





Last modified: 18 March 2022

6. Initial Appointment – Temporary (International)

Before proceeding you should become familiar with the following information:

ļĦ	REGULATIONS, RULES, POLICIE	S AND SOPs	P-G	PREREQUISITES - GENERAL
	Q	PROCESS		
<i>.A.</i>	PRACTICE		*	PROCEDURE
	×	INFOTYPES		

Temporary appointments are used to meet seasonal or peak workloads and specific short-term requirements. When a newly recruited staff member who has never worked for the Organization before arrives in the duty station following a recruitment against a temporary job opening, an Initial Appointment Personnel Action must be completed. This Personnel Action (PA) will create the Staff Member's data in Umoja enabling him or her to receive salary and emoluments at the category, grade, and step under the terms and conditions of service in the offer of appointment.

The first step in the process is to ensure that the candidate has an Index Number. If you have not yet requested an Index Number for the new staff member (see the procedures in the GID job aid below).





Last modified: 15 December 2023

6.1. Initial Appointment Temporary – International

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of international temporary initial appointments and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u>

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.5: Staff in posts subject to international recruitment

Staff Rule 4.12: Temporary appointment

Administration of Temporary Appointments – ST/AI/2010/4/Rev.1

Rules in setting the EOD dates

"Medical Clearances – <u>ST/AI/2018/4</u>

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

Visa status of non-United States staff members serving in the United States, members of their household and their household employees, and staff members seeking or holding permanent resident status in the United States – <u>ST/AI/2000/19</u>

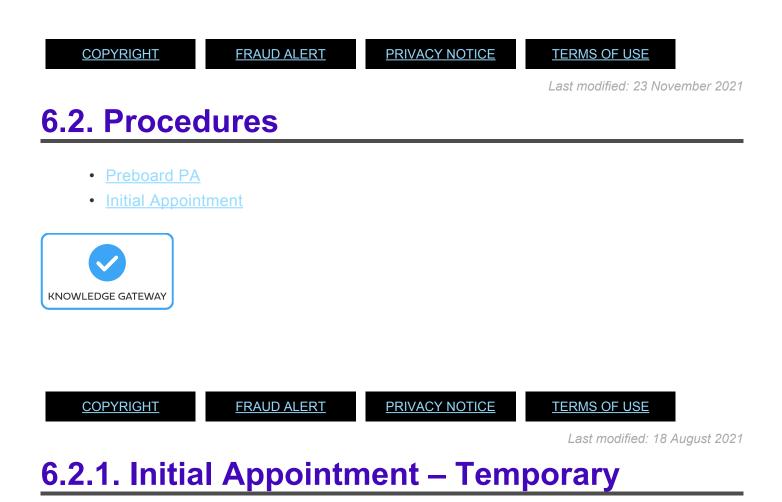
<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 24</u>

Article 21: Participation

Use of <u>When Actually Employed</u> " Contracts for Special Representatives, Envoys and other Special High-Level Positions – <u>SST/SGB/283</u>

Agreement between the United Nations Common System/Chief Executives Board for Coordination and the Association Internationale desInterprètes de Conférence, regulating the Conditions of Employment of Short-Term Conference Interpreters – as of 1 July 2012

Agreement between the United Nations System/Chief Executives Board for Coordination and the Association International des Traducteurs de Conference regulating the Conditions of Employment of Short-Term Translators and Persons Serving in Related Functions – as of 1 January 2013



As best practice, the following infotypes should be reviewed:

1. Start the transaction using the menu path or transaction code, e.g.PA40.

🔄 <u>M</u> enu <u>E</u> dit j	<u>F</u> avorites Extr <u>a</u> s	S <u>y</u> stem <u>H</u> elp
PA40	• R	i 🔍 😪 🔍 🖨 🖁 🚷
Enter > Easy Ac	cess	
🗔 🕞 💫 I 🐆	🏡 🧷 🛛 👻 🔺	

- 2. Click 🕑 button
- 3. Enter the staff member's Index Number in the Personnel No.. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box.
 - b. Click \square to display the list of options for the Reason for Action.

Personnel Action	\$		
Ø			
Collective searc M Search Term	Personnel No. Pers Start	i.Assgn	
• 🛗 Free search	Personnel Actions		
	Action Type	Personn EE group	EE subg
	*** APPOINTMENT ***		•
	Pre Boarding		· ·
	Initial Appointment		
1	Reappointment		
	Reappointment After Retirement		
	Reappointment w/o Break		
	Reinstatement		
	Renewal/Extension of Appt		
	Conversion of Appointment		

Ż	This date must be either the travel date or the actual reporting date.

4. Click 🕑 to validate entries.

5. Click $^{\textcircled{2}}$ to execute the personnel action.



6. Click 🗇 to display the list of options for Reason for Action

Personnel action		
Action Type	Initial Appointment	*
Reason for Action		
		

- 7. Click Replacement on Temp Assign. to Select. ①
- 8. Click \checkmark to confirm selection.



Temporary appointment options are to be chosen between reasons 31 and 60 only as follows:

- Emerg Surge Natural Disaster: Used for staff members that are recruited for temporary positions created to deal specifically with natural disasters
- Emerg Surge Conflict/Violence: Used for staff members that are recruited for temporary positions created to deal specifically with conflict and violence issues
- Seasonal/peak work requirement: Used for staff members that are recruited for positions created to meet the demands of seasonal/peak work periods of limited duration (e.g. temporary positions created during the General Assembly period)
- **Replacement on Special Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Special Leave
- **Replacement on Sick Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Sick Leave
- **Replacement on Maternity Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Maternity Leave
- **Replacement on Paternity Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Paternity Leave
- Replacement on Temp Assign: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Temporary Assignment
- **Temp Appt Pending Selection**: Used for staff members that are recruited on a position that is currently vacant and the selection process is underway
- Special Project Finite Mandate: Used to recruit staff members to work on a project with

a finite mandate and a duration of less than one year

- **Temp Conf Language Staff**: Used for language staff members that are recruited temporarily on a language position
- WAE Conf Language Staff: Used for language staff members that are recruited on a language position but will be paid on a When-Actually-Employed basis
- WAE non-Language Staff: Used for staff members that are recruited on a nonlanguage position and that will be paid on a When-Actually-Employed basis
- Others: Used for other reasons not covered under any of the options above
- 9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

a. Click 🕑 to validate entry.

10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.

Position	310173	P3 1102 ADMINISTRATIVE OF
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🕑 to validate entry.
- 11. Click 🔲 to save the record
- 12. Note the header information has been dynamically updated after saving infotype 0000

(Actions) and that the staff member's Employee Status has changed to Active.

- Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID job aid.
- Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
- For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

- a. Click 🧭 to validate entry
- 13. Click \square to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignments) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u>.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

* 99, enter the correct Payr.area. 99 may appear during reappointments of separated staff members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Temporary appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date for the Staff Member as per the current rules in force. [ddmmyyyy, the date staff member will turn 65 if appointed after 01.01.2014]
 - U1 EOD UN Common System [ddmmyyyy] ()
 - U2 EOD UN Secretariat [ddmmyyyy] ⁽¹⁾
 - U4 Seniority in Grade [ddmmyyyy]

- U5 Retirement Date [ddmmyyyy]
- You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.

G	Date type (1) 12 Entries fo	ound
/	Restrictions	
<	x C ((((((((((((((((((
DT	Date type	
U1	EOD UN Common System	
U2	EOD UN Secretariat	
U4	Seniority in Grade	
U5	Retirement Date	
U6	OVR EOD D/S	
U7	OVR Mobility Ef Date	
U8	Pension Particip Dt	
U9	OVR D/S Arvl-Rental	
UA	Declaration Date	
UB	Waiver Signed Date	
UD	ASHI - UNCS EOD	
UL	AL Accrual	

- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date [ddmmyyyy] in the Date text box.
 - a. Click \bigcirc to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click Temporary.

Contractual Regulations			
Contract Type	Fixed Term	-	Valid Until
Additional fields	Continuing Fixed Term	+	
Rules Series ID	Temporary Consultant		
Status ID	Ind. Contractor		•
Recruitment. Indicator	UN Volunteer UN Police Officer		
Contract Status	Military Observer	111	-
Contract Term	Staff Officer Non-staff Others		•
Contractual Payment State	Govt Provided Person		•
	Language IC Non Active Status	-	
	Not Applicable	¥	
Remarks			

- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click Yes.

Rules Series ID		-	
Status ID	CRB recruit	ment 💌	
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Paymen	t Status Order	Prorated	•

24. Select the appropriate option for <u>Contract Status</u> from the dropdown menu. Click Other.

Additional fields		
Rules Series ID	•	
Status ID	*	
Recruitment. Indicator	No	-
Contract Status		
Contract Term	Expert	
Contractual Payment Status Order	Geographical Language Limited	
	Other	
Remarks	Retiree Retiree - language	

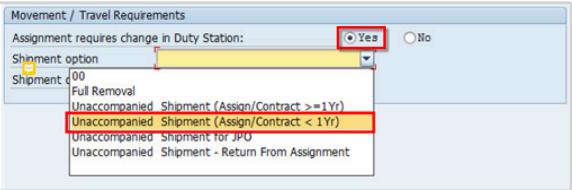
- 25. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 26. Click \square to save the record.
- 27. Click 🗹 to acknowledge the message

Message Text Start date after initi		
C Denie Anee nieel une	al entry date (03.08.2015)	
2 orane obce areer mile	arenuy date (05.06.2015)	9

28. Click to select the <u>NPO Assignment Type</u>. All initial appointments are **permanent movements**.

5	Select	Assignment Type			
	Туре	Description]]]
	LO	Loan to another Agency			
	PM	Permanent Movement			
	SE	Secondment to another Ag			
	ZA	Separated / Retired			
	SL	Special Leave Without Pay			
	TA	Temporary Assignment			
					*
					-
	4 ₽	444	۰	۲	
Se	elect	Cancel			

- 29. Click Select to confirm selection.
- 30. Click Unaccompanied Shipment (Assign/Contract <1Yr) for temporary appointments. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.



31. Click *RLG:* \$1500 for s/m only Shipment details list.

Movement / Travel Re	quirements	
Assignment requires ch	hange in Duty Station:	Yes No
Shipment option	Unaccompanied Shipment (Assign/C	•
Shipment details		
	00	
	Unacc shipment : 100 Kg	
	RLG : \$1500 for s/m only	

- a. Click 🥙 to validate selection.
- 32. Click 🗹 to acknowledge the message

y Message Text D	Det.
Start date after initial entry date (03.08.2015)	Q

33. Click 🕑 to validate values.

C Infotype Edi	<u>G</u> oto Extr <u>a</u> s S <u>v</u> stem <u>H</u> elp
	💌 🖌 🗟 🕲 🖶 🕅 🖗 I 🎝 🕄 💭 🔛 🖉 🖷
Create NPO	Assignment (3344)
🗟 🗟 🧟	

- 34. Click \blacksquare to save the record.
- 35. Count for Mobility should only be checked for a Staff Member hired on posts subject to international recruitment with an initial appointment, reappointment or assignment for one year or longer. In this scenario the Staff Member is being appointed for less than one year and is neither entitled to the Mobility count nor Non-Removal Allowance, so neither should be checked.
 - a. Click 🕒 to skip to next infotype,



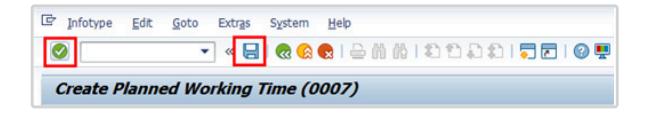
36. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.

🔄 Si	ubtypes for infotype "Addresses" (1)
_/	Restrictions
	◙╓╠╞┉╘╷
_	Name
1	Mailing Address
2	Permanent Address
3	Emergency Contact
4	Duty Station
5	TDY Address
6	Tax Purposes
7	Family Address (Prior DS)

- a. Click 🗹 to confirm selection,
- 37. Enter the details of the Staff Member's mailing address.
 - a. Click 🙋 to validate selections,
- 38. Click \blacksquare to save the record.
- 39. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 40. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Vork schedule rule	NORM	UNHQ Normal 8hrs	
Time Mgmt status	9 - Time	evaluation of planned times	•

Please be sure to select a valid work schedule and verify that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this infotype as time evaluation will not run properly.



a. Click Solution to validate selections, you may have to click Solutions more than once to acknowledge messages at the bottom of the screen.

- 41. Click \blacksquare to save the record.
- 42. You **MUST** enter the Pay scale Group and Level information for this infotype then **validate and save** or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

Click Set to validate entries, you may have to click Set more than once to acknowledge messages at the bottom of the screen.



- 43. Click 🔚 to save the record.
- 44. In this infotype you indicate if the staff member is entitled to Pension participation. The following menu options are available for the:

|_. Fund Details Status |_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months. | **Standard Schema**: This indicates the Staff Member is part of standard Pension Participation. | | **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. | | **Validating**: Should not be used for Initial Appointment or Reappointment. | This should NEVER be selected for an Initial Appointment or

p((((.

PF Number			Reason	
Fund Details				
Status	Contributing	•	Participation date	01.09.2015
Schema	Standard Schema	-		

a. Click 🥙 to validate the values.

¢	Infotype	Edit	Goto	Extr <u>a</u> s	System	Help
0			•] < 日	🚷 🔊	😪 । 🗁 🕅 🖄 । 🎝 🎝 🎝 🕽 । 🛜 📰 । 🎯 🖳
C	reate N	PO P	ensio	n Fund	ls (096	1)

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45. Click \blacksquare to save the record.

46. The <u>infotype 0961</u> (NPO Pension Funds), requires you to save personal ID information. It is imperative to add the permanent resident information if the Staff Member has a permanent residence status in another country

Additionally, the visa and the passport information should always be entered. Click *Passport*.

 Image: A start of the start of	◙╓╠҂๏๏╘ェ
IC	Description
01	G4 Visa
07	G5 Visa
10	Perm Resident
13	B1 Visa
16	B2 Visa
19	U.S. Work Permit
20	Non U.S Official d/s Visa
22	DtyStation Residency Card
25	Carte de Legitimation
28	Passport1
31	Passport2
34	Drivers Licence
36	LP1
37	LP2
38	LP3
39	LP4
43	Birth Certificate
46	Marriage Certificate

- 47. Click 🗹 to confirm selection,
- 48. Complete the field for Passport1
 - ID number [xxxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxxx]
 - Country of issue [xxxxxx]

- a. Click 🥙 to confirm entries.
- 49. Click \blacksquare to save the record.
- 50. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click 🔟 to proceed to the next infotype.
- 51. Minimally, you should record an email address for the Staff Member Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

	◙╓╠╞╝╘╴
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

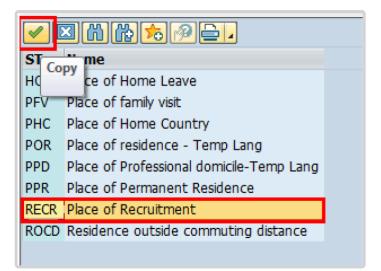
- 52. Click \checkmark to confirm selection.
- 53. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🙋 to validate entry,
- 54. Click \square to save the record.
- 55. Follow the steps above to enter all available forms of Communication. When complete, Click is to proceed to the next infotype.
- 56. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> 0487 (Security/Medical Clearance) with a new effective date, the same as the effective date of this PA you are executing.

a. Click 🗳 to continue with the PA

Copy Security/ Medical Clearance (0487)	

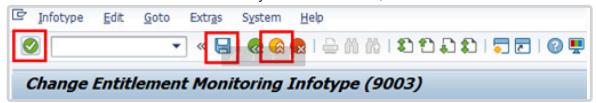
- 57. For temporary appointments, you should minimally record the Staff Member's **Place of Recruitment**.
 - <u>NPO Entitlement Country and City Menu Key</u>
 - a. Click **RECR** label



- 58. Click \checkmark to confirm selection.
- 59. Enter the Country and City, and Airport Code for the place of Recruitment. Click on <u>World Airport Codes</u> to identify the airport code.

NPO Entitlement Count	ry and City
Country & City Type	RECR Place of Recruitment
Country	
City	
Airport Code	

- a. Click 🧭 to validate entry,
- 60. Click \blacksquare to save the record.
- 61. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click to proceed to the next infotype.
- 62. The <u>infotype 9003</u> (Entitlement Monitoring), in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 63. Click 🗹 to validate entry,
- 64. Click 🔄 to save the record. An email notification will be sent to the staff member and the PA will appear in ESS.
- 65. Click 🧟 to return to the SAP Easy Access screen,





You should execute T-code PA20 to review the PA and <u>Infotypes</u> to which you made changes in this transaction, Each personnel action completed should be documented by adding a note (T-code PA30) to the record saved on the Actions (0000) infotype.



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Infotypes Used

Infotypes found in Initial Appointment Temporary PAs

Infotype #	Description	More Info
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	1
0016	Contract Elements	
3344	NPO Assignment	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	1
0185	Personal IDs	1

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0105	Communications	
0487	Security/Medical Clearance	
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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7. Reappointment – Fixed Term (International)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	PREREQUISITES - GENERAL
PROCESS	
INFOTYPES	

A reappointment Personnel Action for a fixed-term appointment is completed when a former staff member is onboarded following a recruitment through the Staff Selection system including those not reviewed by a central review body. This Personnel Action (PA) will update the Staff Member's former data in Umoja and enable the HR Partner to administer the Staff Member and include him/ her in Payroll.

The maximum number of accrued annual leave days that can be paid out upon separation from a fixed-term appointment is 60. However, when a Staff Member is reappointed less than 12 months after a separation from a fixed-term, they are only entitled to payment of any accrued annual leave under the fixed-term appointment minus any balance paid out under the prior appointment up to the maximum of 60. For staff who are reappointed after one year of separation, prior payments would not be taken into consideration in the calculation of annual leave balance. This information should be communicated to the Staff Member during their induction.

Additional requirements for specific lengths of breaks need to be taken into account when rehiring a former Staff Member. For example, a Staff Member who has separated from a fixed-term, permanent, or continuing appointment will be ineligible for re-employment on the basis of a temporary appointment for a period of 31 days following a separation.

Furthermore, in Umoja, the reappointment of Staff Members moving from a Temporary Appointment to a Fixed-Term Appointment gives rise to a new type of personnel action (PA). In the case of Staff Members separating under the aforementioned circumstances, whereby the appointments will be back to back (i.e. they will be separated one day and reappointed the following day), a Reappointment w/o Break PA must be executed.

Please note that although the terminology 'without break in service' is used, legally, the continuity of the Staff Member's appointment has been broken as a separation is required to move from a temporary to a fixed-term appointment. Staff rule 4.17 (b) indicates that a Staff Member's appointment shall be fully applicable without regard to any period of former service and when a Staff Member is re-employed under this rule, the service shall not be considered as continuous between prior and new appointments.

The Reappointment w/o Break PA can only be executed following a Special Separation w/o Break PA, details on which can be found in the Separations job aid.

Finally, note that by application of rule 4.17 (b), since continuity of service is broken upon separation, in cases of reappointment, the new EOD date will be used for determination of eligibility to any entitlement or for application of any rule that requires a specific seniority.

In Umoja, the reappointment of a retired Staff Member also gives rise to a new type of personnel action (PA). In the case of a Staff Member who returns to service after they have been separated from the organization through retirement, or a Staff Member who resigned and is receiving early retirement pension benefits. a Reappointment after Retirement PA must be executed.

These and other cases will be further discussed in the policy and procedural sections below. It is evident that reappointments require special care and knowledge of rules by the HR partner, who must closely examine the prior employment history to determine what type of reappointment PA must be executed whether or not a specific break is required and how this reappointment will affect the entitlements and seniority of the reappointed Staff Member.

Reappointment Personnel Actions

The following are the personnel actions that will be covered in this chapter:

- <u>Reappointment</u>
- <u>Reappointment without a Break</u>
- Reappointment of former Staff Members separated prior to Umoja deployment
- <u>Reappointment of Incoming UN Comon System</u>

The first step in the process is to ensure that the candidate has a valid Index Number. If you have not yet reviewed/requested an Index Number for the former Staff Member (see the procedures in the GID job aid below).



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7.1. Reappointment Fixed Term – International

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of international fixed terms reappointment and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Article IV Appointment and promotion Staff Regulation 4.1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.5: Staff in posts subject to international recruitment

Staff Rule 4.13: Fixed-term appointment

Staff Rule 4.17: Re-Employment

Section 3: Appointment and re-employment

Administration of Fixed Term Appointments – ST/AI/2013/1

Rules in setting the EOD dates

"Medical Clearances – ST/AI/2018/4

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Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> Pension Fund – JSPB/G.4/Rev. 24

Article 21: Participation

Young Professionals Programme Roster

Young professionals programme – ST/AI/2012/2/Rev.1

Section 3: Conditions applicable to external candidates who are successful in a competitive language examination

Section 7: Selection and appointment of successful candidates

Language Examinations Roster

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7.2. Procedure

- Preboard PA
- Add HHM
- <u>Reappointment Fixed Term</u>
 - <u>Reappointment without a Break</u>
 - Reappointment of a Former staff member separated in IMIS
 - Reappointment of Incoming UN Comon System
- Secondment, Transfers, and Loans from Common System





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7.2.1. Reappointment – Fixed Term

As best practice, familiarize yourself with the <u>infotypes</u> used in this procedure.

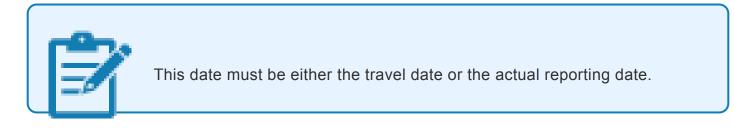
Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.



- 2. Click 📀 button
- 3. Enter the staff member's Index Number in the Personnel No. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box.
 - b. Click to display the list of options for the Reason for Action.

Personnel Action	s				
Ø					
Find by * & Person M Collective searc M Search Term	Personnel No. Pe Start	ers.Assgn			
• 🛗 Free search	Personnel Actions				
	Action Type	Personn	EE group	EE subg	
	*** APPOINTMENT ***				*
	Pre Boarding				*
	Initial Appointment				
	Reappointment				
	Reappointment After Retirement				
	Reappointment w/o Break				
	Reinstatement		-		
	Renewal/Extension of Appt				
	Conversion of Appointment				



- 4. Click 🕑 to validate entries.
- 5. Click W to execute the action.



6. Click 1 to display the list of options for Reason for Action.

Action Type	Initial Appointment	-
Reason for Action	T a	

7. Click Initial Appointment to Select.

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8. Click \checkmark to confirm selection.

🔄 Reason for Action (1) 20 Entries found						
R	estrictions					
	<u></u>					
	Type: 05					
Name of action type: Initial Appointment						
ActR	Name of reason for action					
01	Initial Appointment					
04	Interagency Transfer					
07	Interagency Rem Loan					
10	Interagency Non Reimb Loan					
11	Secondment (incoming)					
30	*** Only For Temp Appts ***					
31	Emerg Surge Natural Disaster					
33	Emerg Surge Conflict/Violence					
35	Seasonal/peak work requirement					
37	Replacement on Special Leave					
39	Replacement on Sick Leave					
41	Replacement on Maternity Leave					
43	Replacement on Paternity Leave					
45	Replacement on Temp Assign					
47	Temp Appt Pending Selection					
49	Special Project Finite Mandate					
51	Temp Conf Language Staff					
53	WAE Conf Language Staff					
55	WAE non-Language Staff					
60	Others					



Reasons for Fixed-Term Appointments are restricted to reasons 01 to 11 inclusive. DO NOT select any reasons 30 to 60 for fixed-term appointments.

Initial Appointment

Used for initial appointments that are not the result of Interagency transfer, secondment or loans.

Interagency Transfer ()

Used for Staff Members who are appointed as a result of an interagency transfer.

Interagency Rem Loan

Used for Staff Members who are appointed as a result of an interagency reimbursable loan.

Interagency Non Reimb Loan ()

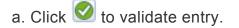
Used for Staff Members who are appointed as a result of an interagency non reimbursable loan.

Secondment (incoming)

Used for Staff Members who are initially appointed as a result of an interagency incoming secondment or as a result of a secondment from a government.

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Organizational assignment	nt	
Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above



10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.

Position	310173	20 P3 1102 ADMINISTRATIVE OF
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- 11. Click \blacksquare to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.
 - Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
 - For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.

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Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British staff member with dual citizenship in the US must have Othr/Birth set to of the USA.

- a. Click 💽 to validate entry
- 13. Click \blacksquare to save the record.
- 14. The values reflected in<u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u>.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

* 99, enter the correct Payr.area. 99 may appear during reappointments of separated

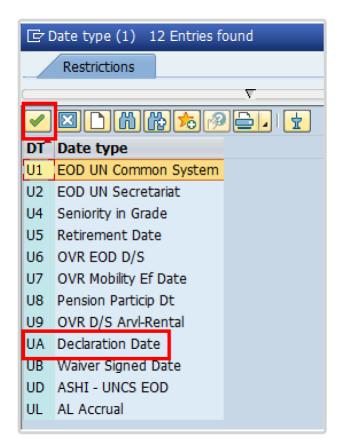
Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Fixed-Term appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the staff member as per the current rules in force. (The date staff member will turn 65 if appointed after 01.01.2014)
 - U1 EOD UN Common System [ddmmyyyy] ()
 - U2 EOD UN Secretariat [ddmmyyyy] ⁽¹⁾
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Fixed Term*.

Contractual Regulations						
Contract Type	Fixed Term	-]	Valid Until		
	Fixed Term	*				
Additional fields	Consultant	*				
Rules Series ID	Ind. Contractor		-			
Status ID	UN Volunteer UN Police Officer		-			
Recruitment. Indicator	Military Observer				•	
Contract Status	Staff Officer	aff Officer		•		
Contract Term	Non-staff Others Govt Provided Person				•	
Contractual Payment Stat					•	
	Non Active Status	*				
0 dia	Not Applicable	٣				
Remarks						



For purposes on onboarding staff, HR partners should select only from the first three options:

- Continuing: for continuing appointments
- Fixed-term: for fixed-term appointments
- Temporary: for Temporary appointments
- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. Select the appropriate option as the method of recruitment from the <u>Status ID</u> dropdown menu.

Additional fields		
Rules Series ID	_	
Status ID		
Recruitment. Indicator	CRB recruitment	•
Contract Status	GS & Rel Recruit Exam	-
Contract Term	NCRE [prior 2011]	•
Contractual Payment Sta	G to P [prior 2011] G to N [prior 2011] Prof Lang Comp Exam	•
Remarks	Top Echelon Appointment GS Competitive Exam Prof Lang Coord Exam Assoc Tran. Support Exam Lang Teacher Exam	

If the Staff Member has been provisionally appointed pending the completion of reference checks this option should be left blank.

24. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Rules Series ID		-	
Status ID	CRB recruit	ment 🔹	
Recruitment. Indicat	tor	No	
Contract Status		No	
Contract Term		Yes	
Contractual Paymen	t Status Order	Prorated	•

25. Select the appropriate option for <u>Contract Status</u> from the dropdown menu.

Additional fields			
Rules Series ID		*	
Status ID	CRB recruit	uitment 👻	
Recruitment. Indicato	or	Yes	•
Contract Status		[-
Contract Term		Expert	
Contractual Payment	Status Order	Geographical	
Contractual Payment Status Order Remarks		Language Limited Other Retiree Retiree - language	

- 26. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 27. Click 🗹 to acknowledge the message

Ty Message Text		Det.
🛆 Start date after initial entry da	ate (03.08.2015)	Q
	Correct errors	

- 28. Click 🔮 to validate values.
- 29. Click \square to save the record.
- 30. Click to select the <u>NPO Assignment Type</u> All initial appointments are **permanent movements**.

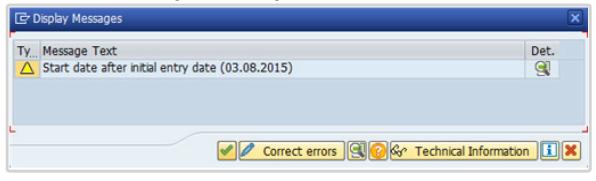
🔄 Infotype 🗄	dit <u>G</u> oto Extr <u>a</u> s	System I	<u>H</u> elp
	▼ « [i 🖶 🕅 🖄 i 🎗 🎝 🗘 🎝 🎝 💭 🔽 i 🥝 🖳
Create NP	0 Assignment	(3344)	
la 🖓 🖓			



32. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.

Movement / Travel Requirements					
Assignment requires ch	ange in Duty Station: Yes 	○ No			
Shipment option	Unaccompanied Shipment (Assign/C				
Shipment details	RLG : \$15,000 @ Dependent rate				

- a. Click 🧭 to validate selection.
- 33. Click 🗹 to acknowledge the message



34. Click 🥙 to validate values.

🔄 Infotype 🛛 🛓	dit <u>G</u> oto	Extras	System	Help
	•] « 日	🔕 🐼	😪 🗁 🕅 🖄 । 🎗 🎝 🗘 🎝 💭 💭 🔜 📿 🖳
Create NP	0 Assign	ment (3	3344)	
🔊 🗟 🧟				

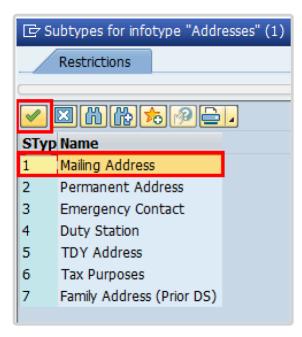
- 35. Click ⊟ to save the record.
- 36. Count for Mobility should only be checked for a Staff Member hired on posts subject to international recruitment with an initial appointment, reappointment or assignment for one year or longer. Therefore, it should always be checked for a fixed-term initial appointment or reappointment as the minimum length for these appointments is 1 year. Click to select.

Non-removal entitlement: DO NOT CHECK

a. Click validate selections. You may have to click validate selections acknowledge messages at the bottom of the screen.



- 37. Click ⊟ to save the record.
- 38. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.



a. Click 🗹 to confirm selection,

- 39. Enter the details of the Staff Member's mailing address.
 - a. Click 🕑 to validate selections,
- 40. Click \blacksquare to save the record.
- 41. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 42. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Please be sure to select a valid work schedule and that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this intotype as time evaluation will not run properly.



a. Click 🗹 to validate selections. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.

- 43. Click \blacksquare to save the record.
- 44. You **MUST** enter the Pay scale Group and Level information for this infotype then validate and save or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

a. Click 🕙 to validate entries. You may have to click 🥙 more than once to acknowledge messages at the bottom of the screen.

🖙 Infotype	Edit	Goto	Wage types	_	-	Help	
		•] « 🔒 🛛	8 😡 😒		12222	🔽 🗷 🎯 🖳
Create E	Basic I	Pay (C	008)				

- 45. Click \square to save the record.
- 46. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for:

[_. Fund Details Status [_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months.]*Standard Schema*: This indicates the Staff Member is

part of standard Pension Participation. || **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months.

Validating: Should not be used for Initial Appointment or Reappointment. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.| p((((.

PF Number			Reason	
Fund Details				
Status	Contributing	•	Participation date	01.09.2015
Schema	Standard Schema	-		

The system automatically set the Staff Member's status to Contributing because of their Fixed-Term appointment. Also, note that the Participation date is automatically generated by the system and cannot be changed.

a. Click 🥙 to validate the values.



- 47. Click \blacksquare to save the record.
- 48. You should record all passports and visas held by the Staff Member. Click Passport.



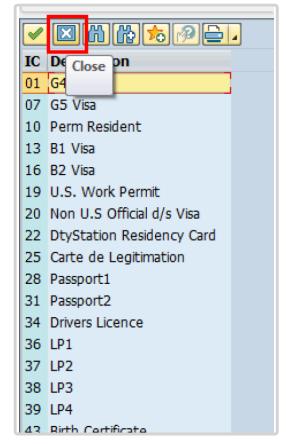
- 49. Click 🗹 to confirm selection,
- 50. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxx]
 - Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

- 51. Click \blacksquare to save the record.
- 52. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- 53. Minimally, you should record an email address for the Staff Member Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

	◙╓╠╞╸╔╴
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

- 54. Click 🗹 to confirm selection.
- 55. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 56. Click \blacksquare to save the record.
- 57. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 58. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this job aid and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> <u>0487</u> (Security/Medical Clearance) with a new effective date, the same as the effective

date of this PA you are executing.

a. Click 🕒 to continue with the PA

Copy Security/ Medical Clearance (0487)

- 59. For fixed-term appointments, you should minimally record the Staff Member's **Place of Recruitment**.
 - <u>NPO Entitlement Country and City Menu Key</u>

In the case of International Staff Members, you must record their Place of Home Leave or exceptionally, the Place of Home Country (see below) as the date on which it is established is one of the elements used to calculate the Staff Member's repatriation entitlement upon separation.

a. Click HOLV label

	Restrictions
	ν.
	◪ѨѨ҉ѻฅ๒╻
STyp	Name
HOLV	Place of Home Leave
PFV	Place of family visit
PHC	Place of Home Country
POR	Place of residence - Temp Lang
PPD	Place of Professional domicile-Temp Lang
PPR	Place of Permanent Residence
RECR	Place of Recruitment
ROCD	Residence outside commuting distance

- 60. Click 🗹 to confirm selection.
- 61. Enter the Country [xxxxxx] and City [xxxxxx], and Airport Code [xxxx] for the place of Home Leave. Click on <u>World Airport Codes</u> to identify the airport code.

The place of home leave must be established for all international staff, even for those

serving in the same country as their nationality.

- a. Click 🧭 to validate entry,
- 62. Click \blacksquare to save the record.
- 63. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click is to proceed to the next infotype.
- 64. The <u>infotype 9003</u> (Entitlement Monitoring), in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 65. Click 🥙 to validate entry,
- 66. Click 😾 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 67. Click 🧟 to return to the SAP Easy Access screen,



You should execute T-code PA20 to review the PA and <u>infotypes</u> to which you made changes in this transaction. Each personnel action completed should be documented by adding a note (T-code PA30) to the record saved on the <u>infotype 0000</u>.



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Reappointment without a Break

This PA is restricted to situations of a reappointment following a Special Separation without a break (SM is separated one day and reappointed the next day). In these cases, there is no need to complete a preboard PA.

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Reappointment of a Former Staff member separated in IMIS

For former staff members separated prior to Umoja deployment (i.e., separated in IMIS, the pre-cursor to Umoja), or who need to travel upon reappointment.

Staff members who were separated in IMIS (whose records may or may not have been uploaded to Umoja) will not have a <u>Preboard PA</u> in their Umoja history and will be missing <u>infotype 0017</u> (Travel Privileges), the infotype needed for travel. In these cases, a Preboard PA must be completed prior to the execution of the Reappointment PA. Please refer to the <u>Preboard</u> procedures chapter of this job aid. If the Staff Member is travelling with a spouse and/or children, they would also need to be <u>added as household members for preboard</u> <u>purposes</u>.

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Reappointment of Incoming UN Common System

For staff members coming to the Secretariat on Secondment, Interagency Transfer, or Interagency Loan, who have previously had an initial appointment processed by the Secretariat in IMIS or Umoja, a Reappointment PA is executed, using the appropriate reason for Action as follows:

- Interagency Rem Loan: for reimbursable loans from the Common System
- Interagency Non Reimb Loan: for non-reimbursable loans from the Common System
- Secondment (incoming): for secondments

However, please beware that:

- You must be particularly vigilant about entering the U1 date with the EOD UN common system.
- If the staff is in receipt of mobility the effective date of the mobility should be adjusted in U7 and the seniority in grade in U4.
- The next WIG needs to be overriden in <u>infotype 0008</u> (Basic Pay)
- The start date of the <u>infotype 3244</u> (NPO Entitlement Country and City) must match the EOD common system date (U1)
- In <u>infotype 0960</u> (NPO Mobility and Hardship Allowance) you need to enter the additional counts for mobility if applicable.
- If infotype 2013 comes up to enter the AL balance contained in the administrative details of the staff member, DO NOT use. Skip this infotype and enter the AL balance and home leave points after you execute the onboarding PA using a PA30, infotype 2012.

After the executing of the Reappointment PA:

- If you are processing incoming secondments or transfers, you will also need to enter the time served prior to joining the UN Secretariat in infotype 0552 using a PA30. This is so that the repatriation grant is properly computed upon separation.
- If you need to update the historical mobility records, you need to create an entry in infotype 9960 using a PA30



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Infotypes Used

Infotypes found in Reappointment Fixed Term PAs

Infotype #	Description	More Info
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	()
0016	Contract Elements	
3344	NPO Assignment	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0960	NPO Mobility and Hardship Allowance	
0961	NPO Pension Funds	
0185	Personal IDs	
0105	Communications	
0487	Security/Medical Clearance	
3244	NPO Entitlement Country and City	()
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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8. Reappointment – Temporary (International)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	Prerequisites - general
PROCESS	PROCEDURE

Temporary appointments are used to meet seasonal or peak workloads and specific short-term requirements. When a former staff member is rehired on a temporary appointment, a Reappointment Personnel Action must be completed.

The maximum number of accrued annual leave days that can be paid out upon separation from a temporary appointment is 18. However, when a Staff Member is reappointed less than 12 months after a separation, they are only entitled to payment of any accrued annual leave under the temporary appointment minus any balance paid out under the prior appointment up to the maximum of 18. For staff who are reappointed after one year of separation, prior payments would not be taken into consideration in the calculation of annual leave balance. This information should be communicated to the Staff Member during their induction.

Additional requirements for specific lengths of breaks need to be taken into account when processing a Reappointment PA. For example, a Staff Member who has separated from a fixed-term, permanent, or continuing appointment is ineligible for re-employment on a temporary appointment for a period of 31 days following a separation.

Furthermore, in Umoja, the reappointment of a retired Staff Member gives rise to a new type of Personnel Action (PA). In the case of Staff Members returning to service after they have been separated from the Organization through retirement, or who are claiming an early retirement pension benefit, a Reappointment after Retirement PA must be executed.

The employment of retirees under Temporary Appointment gives rise to very specific restrictions (regarding break-in service, earnings threshold and length of appointment) that

must be observed when processing onboarding.

Finally, note that by application of rule 4.17 (b), since continuity of service is broken upon separation, in cases of reappointment, the new EOD date will be used for determination of eligibility to any entitlement or for application of any rule that requires a specific seniority.

These and other cases will be further discussed in the policy and procedural sections below. It is evident that reappointments require special care and knowledge of rules by the HR partner, who must closely examine the prior employment history to determine what type of Reappointment PA must be executed, whether or not a specific break is required and how this reappointment will affect the entitlements and seniority of the reappointed Staff Member.

The first step in the process is to ensure that the candidate has a valid Index Number. If you have not yet reviewed/requested an Index Number for the former Staff Member (see the procedures in the GID job aid below).





8.1. Reappointment Temporary – International

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of international temporary reappointment and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

Staff Rules and Staff Regulations of the United Nations – ST/SGB/2018/1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.5: Staff in posts subject to international recruitment

Staff Rule 4.12: Temporary appointment Section 3: Appointment and re-employment Section 5: Eligibility Section 7: Salaries and related allowances Section 10: Medical insurance Section 11: Travel-related entitlements Section 12: Staff members serving under a when-actually-employed contract Section 13: Staff members governed by the agreements with the Association internationale des traducteurs de conférence and the Association internationale des interprètes de conférence. Section 16: Permanent residency

Staff Rule 4.17: Re-Employment

Administration of Temporary Appointments – ST/AI/2010/4/Rev.1

Section 2: Use and duration of temporary appointments

Rules in setting the EOD dates

"Medical Clearances – ST/AI/2018/4

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

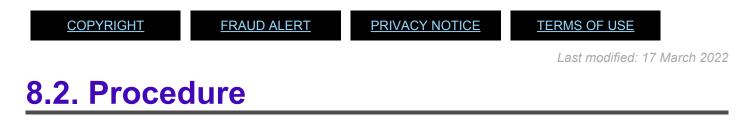
Section 6: Procedures, forms and documentation for medical clearance on initial appointment

Visa status of non-United States staff members serving in the United States, members of their household and their household employees, and staff members seeking or holding permanent resident status in the United States – <u>ST/AI/2000/19</u>

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 24</u>

Article 21: Participation

Use of <u>When Actually Employed</u> " Contracts for Special Representatives, Envoys and other Special High-Level Positions – <u>SST/SGB/283</u>



- Preboard PA
- <u>Reappointment Temporary</u>
 - <u>Reappointment of a Retired staff member</u>
 - Reappointment PA Language Daily
 - <u>Reappointment After Retirement PA WAE Language</u>



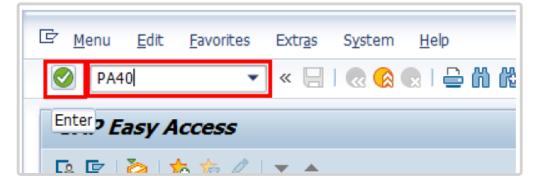
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8.2.1. Reappointment – Temporary

As best practice, familiarize yourself with the infotypes used in this procedure.

Procedure

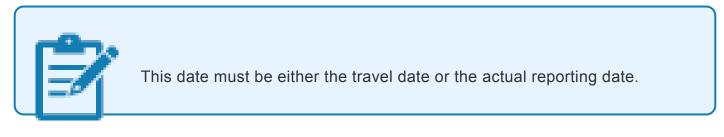
1. Start the transaction using the menu path or transaction code, e.g.PA40.





- 3. Enter the staff member's Index Number in the Personnel N text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box.
 - b. Click \square to display the list of options for the Reason for Action.

Personnel Action	5				
Ø					
Collective searc M Search Term	Personnel No. Pers	s.Assgn			
• 🛗 Free search	Personnel Actions				
	Action Type	Personn	EE group	EE subg	
	*** APPOINTMENT ***				*
	Pre Boarding			2	*
	Initial Appointment			2	-
	Reappointment				
	Reappointment After Retirement				
	Reappointment w/o Break				
	Reinstatement				
	Renewal/Extension of Appt				
	Conversion of Appointment				



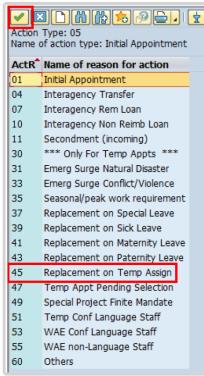
- 4. Click Solution to validate entries.
- 5. Click W to execute the personnel action.

. 🧐	Personnel Actions

6. Click to display the list of options for <u>Reason for Action</u>

Personnel action		
Action Type	Initial Appointment	*
Reason for Action		

- 7. Click Replacement on Temp Assign to select.
- 8. Click \checkmark to confirm selection.



Δ

Temporary appointment options are to be chosen between reasons 31 and 60 only as follows:

- Emerg Surge Natural Disaster: Used for staff members that are recruited for temporary positions created to deal specifically with natural disasters
- Emerg Surge Conflict/Violence: Used for staff members that are recruited for temporary positions created to deal specifically with conflict and violence issues
- Seasonal/peak work requirement: Used for staff members that are recruited for positions created to meet the demands of seasonal/peak work periods of limited duration (e.g. temporary positions created during the General Assembly period)

- **Replacement on Special Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Special Leave
- **Replacement on Sick Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Sick Leave
- **Replacement on Maternity Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Maternity Leave
- **Replacement on Paternity Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Paternity Leave
- Replacement on Temp Assign: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Temporary Assignment
- **Temp Appt Pending Selection**: Used for staff members that are recruited on a position that is currently vacant and the selection process is underway
- Special Project Finite Mandate: Used to recruit staff members to work on a project with

a finite mandate and a duration of less than one year

- **Temp Conf Language Staff**: Used for language staff members that are recruited temporarily on a language position
- WAE Conf Language Staff: Used for language staff members that are recruited on a language position but will be paid on a When-Actually-Employed basis
- WAE non-Language Staff: Used for staff members that are recruited on a nonlanguage position and that will be paid on a When-Actually-Employed basis
- Others: Used for other reasons not covered under any of the options above
- 9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position	Integration: default posi	
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

a. Click 🧭 to validate entry.

10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.

Position	310173	20 P3 1102 ADMINISTRATIVE OF
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🕑 to validate entry.
- 11. Click \square to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the staff member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal

documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.

- Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
 - For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

a. Click 🕑 to validate entry

- 13. Click \blacksquare to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u> (Actions).

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

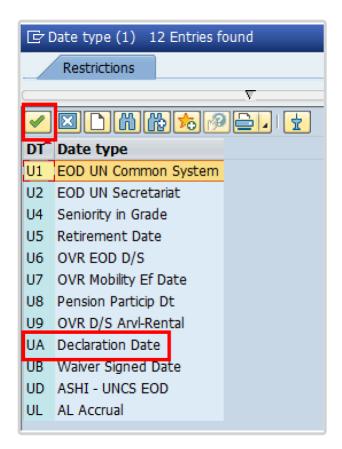
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Temporary appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after 01.01.2014)
 - U1 EOD UN Common System [ddmmyyyy] 🕕
 - U2 EOD UN Secretariat [ddmmyyyy] ⁽¹⁾
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date [ddmmyyyy] in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Temporary*.

Contractual Regulations			
Contract Type	Fixed Term	-	Valid Until
Additional fields	Continuing Fixed Term	4	
	Temporary		
Rules Series ID	Consultant		_
Status ID	Ind. Contractor UN Volunteer		•
Recruitment. Indicator	UN Police Officer		•
Contract Status	Military Observer	11	•
Contract Term	Staff Officer Non-staff Others		•
Contractual Payment State			•
	Language IC		
	Non Active Status	*	
	Not Applicable	Ŧ	
Remarks			

- 22. Enter the expiration date of the appointment [ddmmyyyy] in the Valid Until text box. [ddmmyyyy]
- 23. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Additional fields			
Rules Series ID		•	
Status ID	CRB recruit	ment 🔻	
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Paymen	t Status Order	Prorated	•

24. Select the appropriate option for <u>Contract Status</u> from the dropdown menu.

Additional fields		
Rules Series ID	•	
Status ID	*	
Recruitment. Indicator	No	•
Contract Status		
Contract Term	Expert	Ĩ
Contractual Payment Status Order	Geographical Language Limited	
	Other	
Remarks	Retiree Retiree - language	

- 25. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 26. Click \square to save the record.
- 27. Click 🗹 to acknowledge the message

Message Text Start date after initi		
C Denie Anee nieel une	al entry date (03.08.2015)	
2 orane obce areer mile	arenuy date (05.06.2015)	9

28. Click to select the <u>NPO Assignment Type</u>. All initial appointments are **permanent movements**.

5	Select	Assignment Type			
	Туре	Description			[]]
	LO	Loan to another Agency			
	PM	Permanent Movement			
	SE	Secondment to another Ag			
	ZA	Separated / Retired			
	SL	Special Leave Without Pay			
	TA	Temporary Assignment			
					•
	4 ₽	444	4	۲	
Se	elect	Cancel			

- 29. Click Select to confirm selection.
- 30. Click Unaccompanied Shipment (Assign/Contract <1Yr) for temporary appointments.

If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.



31. Click RLG: \$1500 for s/m only in the Shipment details list.

Movement / Travel Re	quirements	
Assignment requires ch	hange in Duty Station:	Yes No
Shipment option	Unaccompanied Shipment (Assign/C	•
Shipment details		
	00	
	Unacc shipment : 100 Kg	
	RLG : \$1500 for s/m only	

- a. Click 🕑 to validate selection.
- 32. Click 🗹 to acknowledge the message

y Message Text	Det.
Start date after initial entry date (03.08.2015)	9

33. Click 🗹 to validate values.

C įr	nfotype	Edit	<u>G</u> oto	Extr <u>a</u> s	System	Help
			•] « 日	🔕 🔕	😡 🗁 🕅 🏠 । 🏝 🏝 🛼 🗐 💌 🖳 🥥 🖳
Cri	eate N	PO A	ssigni	ment (.	3344)	
	🗟 🧟					

- 34. Click \square to save the record.
- 35. Count for Mobility should only be checked for a Staff Member hired on posts subject to international recruitment with an initial appointment, reappointment or assignment for one year or longer.
 - a. Click 🚺 to skip to next infotype,



36. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.

🖙 Si	ubtypes for infotype "Addresses" (1)
	Restrictions
	◙╓╠р
_	Name
1	Mailing Address
2	Permanent Address
3	Emergency Contact
4	Duty Station
5	TDY Address
6	Tax Purposes
7	Family Address (Prior DS)

- a. Click 🗹 to confirm selection,
- 37. Enter the details of the Staff Member's mailing address.
 - a. Click 🔮 to validate selections,
- 38. Click \blacksquare to save the record.
- 39. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 40. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Vork schedule rule	NORM	UNHQ Normal 8hrs	
Time Mgmt status	9 - Time	evaluation of planned times	-

Please be sure to select a valid work schedule and verify that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this infotype as time evaluation will not run properly.



a. Click 🗹 to validate selections. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.

- 41. Click \blacksquare to save the record.
- 42. You **MUST** enter the Pay scale Group and Level information for this infotype then **validate and save** or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

1. Click 🕑 to validate entries. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.



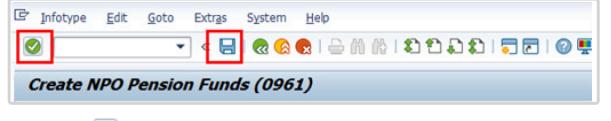
- 43. Click \square to save the record.
- 44. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for:

Fund Details Status	Schema
Contributing : If the Staff Member has an initial appointment of more than 6 months.	Standard Schema : This indicates the Staff Member is part of standard Pension Participation.
Non-Contributing: If the Staff Member has an initial appointment of less than 6 months. Validating: Should not be used for Initial Appointment or Reappointment.	SLWOP Schema : This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.

PF Number			Reason	
Fund Details				
Status	Contributing	-	Participation date	01.09.2015
Schema	Standard Schema	-		

a. Click 🕑 to validate the values.

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- 45. Click ⊟ to save the record.
- 46. The next infotype requires you to save personal ID information. It is imperative to add the permanent resident information if the Staff Member has a permanent residence status in another country. Additionally, the visa and the passport information should always be entered. Click *Passport*.



- 47. Click \checkmark to confirm selection,
- 48. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]

- Valid to [ddmmyyyy]
- Place of issue [xxxxxxx]
- Country of issue [xxxxxx]
 - a. Click 🔮 to confirm entries.
- 49. Click \blacksquare to save the record.
- 50. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- · Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- 51. Minimally, you should record an email address for the Staff Member. Use the Staff

Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- · UN Office Telephone
- · Cell Phone

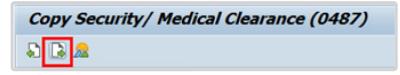


- 52. Click \checkmark to confirm selection.
- 53. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 54. Click \blacksquare to save the record.
- 55. Follow the steps above to enter all available forms of Communication. When complete, click it proceed to the next infotype.
- 56. If you need to record a <u>Medical or Security Clearance</u> because the <u>Clearance Type</u>, <u>Clearance Category</u>, <u>Application Status or Reference Number</u> fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> of this manual and remember to

save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> 0487 (Security/Medical Clearance) with a new effective date, the same as the effective date of this PA you are executing.

a. Click 🗳 to continue with the PA



- 57. For temporary appointments, you should minimally record the staff member's **Place of Recruitment**.
 - <u>NPO Entitlement Country and City Menu Key</u>
 - a. Click **RECR** label



- 58. Click 🗹 to confirm selection.
- 59. Enter the Country and City, and Airport Code for the place of Recruitment. Click on <u>World Airport Codes</u> to identify the airport code.

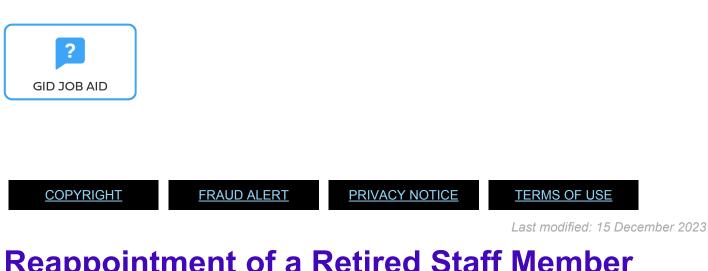
NPO Entitlement Count	ry and City
Country & City Type	RECR Place of Recruitment
Country	
City	
Airport Code	

- a. Click 🧭 to validate entry,
- 60. Click \blacksquare to save the record.
- 61. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click to proceed to the next infotype.
- 62. The infotype 9003 (Entitlement Monitoring), in this PA for records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 63. Click 🧭 to validate entry,
- 64. Click 🔄 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 65. Click 🧟 to return to the SAP Easy Access screen,

	? Infotype	Edit				
I	Ø		•] « 🖪	@ 6	2 🗁 🕅 🏠 釣 釣 釣 釣 訂 🔽 🛛 🛛 🖳 🔛
	Change	Entit	lemen	t Moni	toring	Infotype (9003)



You should execute T-code PA20 to review the PA and infotypes to which you made changes in this transaction. Each personnel action completed should be documented by adding a note (T-code PA30) to the record saved on the infotype 0000 (Actions).



Reappointment of a Retired Staff Member

Retiree Restrictions:

Retirees are defined as "former staff members who are re-employed who are age 55 or older who are in receipt of pension benefits". Pension benefits can refer to both full pension and early retirement benefits. Reemployment of retirees is subject to certain conditions that must be observed:

- 1. Retirees, except for language service staff, in receipt of pension benefits are subject to an earnings threshold of USD \$22,000 per calendar year and cannot have a cumulative period of service in excess of six months per calendar year.
- 2. The earnings threshold for retired language service staff cannot be more than the equivalent of 125 days of monetary compensation, per calendar year. Additionally, they may not be re-employed for more than 125 days per calendar year.
- Former staff who are re-employed after they have started claiming a pension benefit may not be re-employed at a level higher than that at which they separated from the Organization.

4. Retirees will be ineligible for re-employment for a period of three months following separation and cannot be reappointed on a fixed-term contract.

If someone separates from the Organization even after the age of 55, but at the time of reappointment they are not in receipt of pension benefit, they are not retirees and they can be hired as any other external applicant on a fixed-term or temporary appointment as long as they are not over the mandatory retirement age. Provided they meet the requirements, they could be reappointed at a higher level and grade than that at the time of separation.

However, once the former Staff Member separates and starts claiming a pension benefit, they are to be treated as retirees and the above conditions will apply. It is therefore very important to always check with a former Staff Member over the age of 55 to determine if they are claiming pension, as the answer to the question will determine if they are retirees or not and whether the above conditions apply.

Umoja has specific PAs for both separation and reappointment of retirees. The separation PAs for retirees

- assign the status of "retiree" in the system (instead of withdrawn)
- · allow for the application of ASHI and
- trigger the interface with Pension.

This is true for separations due either as a result of reaching mandatory age of retirement, or as a result of resignation to claim the early retirement benefit of the Pension Fund.

Having the status of "retiree" is a prerequisite for processing the Reappointment of Retiree PA. So not only does the HR Partner need to check a reappointed Staff Member who is over the age of 55 whether they are in receipt of pension benefit, but before processing the Reappointment of Retiree PA, the HR Partner must also ensure that the correct separation PA was executed, and the "retiree" status is correctly reflected in the system for those who are retirees.

While the Retirement PAs (as a result of reaching mandatory retirement age or a resignation in order to claim early retirement) assign the status of "retiree", we may have cases of former staff who are in receipt of pension at the time of reemployment but do not have a status of retiree in Umoja. This might be the case if at the time of their separation they were not eligible or did not intend to claim pension. For instance, a Staff Member whose appointment expired at age 45 would have a separation as a result of expiration of appointment and the status in Umoja would be withdrawn. If they come back for reemployment at age 56 and at that time they are claiming

early retirement pension benefits, they are retirees and would be subject to the conditions of reemployment of retirees. In such cases, the correct PA is a reemployment of retiree, but we first need to change their status from withdrawn to "retiree". If you come across such situations, please contact your help desk.

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Reappointment PA – Language Daily

This procedure can be used to reappoint a former staff member who is not a retiree into a temporary language post paid at the daily rate. It can also be used to recruit at the monthly rate, the only difference being the selection of the Monthly instead of the Daily rate in the field Contract term in infotype 0016 (Contract Elements).

In the event you are reappointing a former Staff Member who is not a retiree to a temporary language daily contract, you need to select the reappointment after retirement PA instead of a reappointment PA. All other instructions remain the same.

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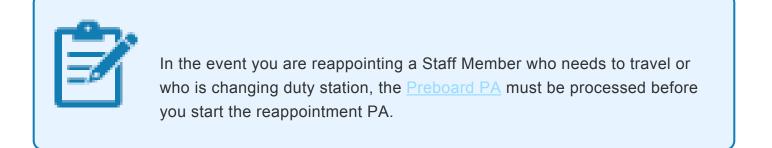
Last modified: 17 March 2022

Reappointment After Retirement PA – WAE Language

This procedure is used for reappointments of former staff members who are in receipt of pension who are recruited on WAE temporary language positions For reappointments of language staff who are not retirees see prior procedure.

The procedure below showcases language WAE appointments for retirees. If the retiree is being hired on a temporary language daily or monthly, you need to execute the Reappointment after Retirement PA but you should refer to the prior procedure for specific options to be selected for this type of temporary appointment.

If you are processing a reappointment of a WAE for a non-retiree, select the Reappointment PA and then follow the procedures for WAE as indicated below.



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Infotypes Used

Infotypes found in Reappointment Temporary PAs

Infotype #	Description	More Info.
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	()
0016	Contract Elements	
3344	NPO Assignment	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	()
0185	Personal IDs	()
0105	Communications	

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0487	Security/Medical Clearance	
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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9. Initial Appointment – Fixed Term (Local)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	PREREQUISITES - GENERAL
PROCEDURE	INFOTYPES

The first step in the process is to ensure that the candidate has an Index Number. If you have not yet requested an Index Number for the new staff member (see the procedures in the GID job aid below).





9.1. Initial Appointment Fixed Term – Local

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of national fixed term initial appointments and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Article IV Appointment and promotion Staff Regulation 4.1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

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Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.11: Types of appointment

Staff Rule 4.13: Fixed-term appointment

"Administration of Fixed Term Appointments – ST/AI/2013/1/Corr.1

Rules in setting the EOD dates

"Medical Clearances – <u>ST/Al/2018/4</u> Section 2: Medical clearance for initial appointment Section 3: Validity of medical documentation and medical clearance Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 24</u>

Article 21: Participation



9.2. Initial Appointment – Fixed Term

As a best practice, familiarize yourself with the <u>infotypes</u> used in this procedure.

Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.

☞ <u>M</u> enu <u>E</u> dit	<u>F</u> avorites Extr <u>a</u> s	S <u>y</u> stem <u>H</u> elp			
PA40	▼ « 📙	i 🔍 😪 🔍 i 🖨 🕅 🕻			
Enter > Easy Access					
🖸 🕞 💫 I 🏡	📩 🖉 🛛 👻 🔺				

- 2. Click 🙆 button
- 3. Enter the staff member's Index Number in the Personnel No. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box. This date must be actual reporting date.
 - b. Click I to display the list of options for the Reason for Action.

Personnel Action	IS							
Q								
Find by * & Person • M Collective searc • M Search Term • M Free search	Personnel No. Per Start	rs.Assgn						
• In Free search	Personnel Actions							
	Action Type	Personn EE group	EE subg					
	*** APPOINTMENT ***		•					
	Pre Boarding		· ·					
	Initial Appointment							
	Reappointment							
	Reappointment After Retirement							
	Reappointment w/o Break	No.						
	Reinstatement							
	Renewal/Extension of Appt							
	Conversion of Appointment							

- 4. Click 🕑 to validate entries.
- 5. Click W to execute the action.



6. Click to display the list of options for Reason for Action.

Personnel action		
Action Type	Initial Appointment	-
Reason for Action	l l	

- 7. Click Initial Appointment to Select.
- 8. Click 🗹 to confirm selection.

LE7 Rea	ason for Action (1) 20 Entries four	no			
F	Restrictions				
	3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				
Action	Type: 05				
	of action type: Initial Appointment				
ActR	Name of reason for action				
01	Initial Appointment				
04	Interagency Transfer	•			
07	Interagency Rem Loan				
10	Interagency Non Reimb Loan				
11	Secondment (incoming)				
30	*** Only For Temp Appts ***				
31	Emerg Surge Natural Disaster				
33	Emerg Surge Conflict/Violence				
35	Seasonal/peak work requirement				
37	Replacement on Special Leave				
39	Replacement on Sick Leave				
41	Replacement on Maternity Leave				
43	Replacement on Paternity Leave				
45	Replacement on Temp Assign				
47	Temp Appt Pending Selection				
49	Special Project Finite Mandate				
51	Temp Conf Language Staff				
53	WAE Conf Language Staff				
55	WAE non-Language Staff				
60	Others				

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

a. Click 🧭 to validate entry.

- Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area is displayed. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.
 - If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
 - If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve it.
 - If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🕑 to validate entry.
- 11. Click \square to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - <u>Infotype 0002</u> (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal

document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.

- Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
 - For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.

Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

- a. Click 💟 to validate entry
- 13. Click \square to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organization Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u> (Action).
 - Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

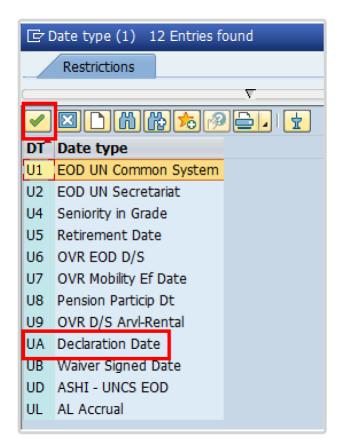
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the staff member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Fixed-Term appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after 01.01.2014)
 - U1 EOD UN Common System [ddmmyyyy] ⁽¹⁾
 - U2 EOD UN Secretariat [ddmmyyyy] (1)
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Fixed Term*.

Contract Type	Fixed Term	-		Valid Until			
	Fixed Term	-				-	
Additional fields	Consultant	•					
Rules Series ID	Ind. Contractor		•				
Status ID	UN Volunteer		-				
Recruitment. Indicator	UN Police Officer Military Observer				-		
Contract Status	Staff Officer	111			-		
Contract Term	Non-staff Others Govt Provided Person Language IC Judge				-		
Contractual Payment State					*		
	Non Active Status	*					
Remarks	Not Applicable	Ŧ					

- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. Select the appropriate option as the method of recruitment from the <u>Status ID</u> dropdown menu.

Additional fields		
Rules Series ID	_	
Status ID	_	
Recruitment. Indicator	CRB recruitment	-
Contract Status	GS & Rel Recruit Exam	-
Contract Term	NCRE [prior 2011]	-
Contractual Payment Sta	Prof Lang Comp Exam	•
Remarks	Top Echelon Appointment GS Competitive Exam Prof Lang Coord Exam Assoc Tran. Support Exam Lang Teacher Exam	

If the Staff Member has been provisionally appointed pending the completion of reference checks this option should be left blank.

24. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Additional fields			
Rules Series ID	V	-	
Status ID	CRB recruit	ment 🔻	
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Payment	t Status Order	Prorated	•

25. Select the appropriate option for <u>Contract Status</u> from the dropdown menu.

Additional fields	
Rules Series ID	-
Status ID	*
Recruitment. Indicator	No
Contract Status	
Contract Term	Expert
Contractual Payment Status Order	Geographical Language
	Other
Remarks	Retiree - language

- 26. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🧭 to validate entries.
- 27. Click \checkmark to acknowledge the message

🔄 Display Messages	x
Ty Message Text	Det.
△ Start date after initial entry date (03.08.2015)	9
Correct errors	🗞 Technical Information 🚺 🗶

- 28. Click 🕑 to validate values.
- 29. Click \blacksquare to save the record.
- 30. Click to select the <u>NPO Assignment Type</u> All initial appointments are **permanent movements**.

🔄 Infotype	Edit	Goto	Extr <u>a</u> s	System	Help
		•] « 日	🔕 🙆	😪 । 🗁 🖄 🖄 🗈 🏝 🛱 🕽 🗮 🕄 🥥 🖳
Create	NPO A	ssign	ment (3344)	
🔊 🗟 🧟					

31. Click Select to confirm selection.

🖙 Infotype	Edit	<u>G</u> oto	Extr <u>a</u> s	System	Help				
		•] « 日	🔕 🙆	😡 I 🖨	的份目	221	1 🕄 🛛	0 🖳
Create I	VPO A	ssigni	ment (3344)	8				
🔊 🗟 🧟									

- 33. Click \square to save the record.
- 34. The HR Partner should minimally enter the addresses for Mailing Address and

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Permanent Address, and the Emergency Contact information.

🔄 Si	ubtypes for infotype "Addresses" (1)				
Restrictions					
	◪װ╠๖๏๏๖				
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)				

a. Click 🗹 to confirm selection,

- 35. Enter the details of the Staff Member's mailing address.
 - a. Click 🕑 to validate selections,
- 36. Click \blacksquare to save the record.
- 37. Follow the steps above to enter all the available addresses. When done click is proceed to next infotype,
- 38. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Please be sure to select a valid work schedule and that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is

0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this infotype as time evaluation will not run properly.



a. Click 🗹 to validate selections. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.

- 39. Click \square to save the record.
- 40. You **MUST** enter the Pay scale Group and Level information for this infotype then **validate and save** or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the staff member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

a. Click 🕑 to validate entries. You may have to click 🧐 more than once to acknowledge messages at the bottom of the screen.



- 41. Click ⊟ to save the record.
- 42. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for:

Fund Details Status	Schema
Contributing : If the Staff Member has an initial appointment of more than 6 months.	Standard Schema : This indicates the Staff Member is part of standard Pension Participation.
Non-Contributing: If the Staff Member has an initial appointment of less than 6 months. Validating: Should not be used for Initial Appointment or Reappointment.	SLWOP Schema : This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.

PF Number			Reason	•
Fund Details				
Status	Contributing	-	Participation date	01.09.2015
Schema	Standard Schema	-		

The system automatically set the Staff Member's status to Contributing because of their Fixed-Term appointment. Also note that the Participation date is automatically generated by the system and cannot be changed.

a. Click 🧭 to validate the values.



- 43. Click ⊟ to save the record.
- 44. You should record all passports and visas held by the Staff Member. Click Passport.

	◙Ѩ╠Ҍ҄ፇѐӏ
IC	Description
01	G4 Visa
07	G5 Visa
10	Perm Resident
13	B1 Visa
16	B2 Visa
19	U.S. Work Permit
20	Non U.S Official d/s Visa
22	DtyStation Residency Card
25	Carte de Legitimation
28	Passport1
31	Passport2
34	Drivers Licence
36	LP1
37	LP2
38	LP3
39	LP4
43	Birth Certificate
46	Marriage Certificate

- 45. Click \checkmark to confirm selection,
- 46. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxx]
 - Country of issue [xxxxxx]

- a. Click 🔮 to confirm entries.
- 47. Click \square to save the record.
- 48. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank accounts in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

 For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- Minimally, you should record an email address for the Staff Member. Use the Staff Member's personal email address, if their UN Email address is not yet available. Click UN Email Address.

If available, enter also:

- UN Office Telephone
- Cell Phone

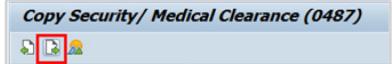
Image: Stype in the second
0001 System user name (SY-UNAME) 0005 Fax 0010 UN Email Address 0020 UN Office Telephone CELL Cell phone MAIL Personal Email Address
0005 Fax 0010 UN Email Address 0020 UN Office Telephone CELL Cell phone MAIL Personal Email Address
0010 UN Email Address 0020 UN Office Telephone CELL Cell phone MAIL Personal Email Address
0020 UN Office Telephone CELL Cell phone MAIL Personal Email Address
CELL Cell phone MAIL Personal Email Address
AAIL Personal Email Address
PAGR Pager
J003 Radio Call Sign
J006 Data Line
J007 Telex Line
J008 Satellite Phone
J009 Dect Phone
J010 Trunking Radio
J011 Pension system ID Num

- 50. Click 🗹 to confirm selection.
- 51. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 52. Click \blacksquare to save the record.
- 53. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 54. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of this PA will create a new, duplicate record in <u>infotype</u> <u>0487</u> (Security/Medical Clearance) with a new effective date, the same as the effective

date of this PA you are executing.

a. Click 🕒 to continue with the PA



- 55. The last <u>infotype 9003</u> (Entitlement Monitoring), in this PA records completion of the action. Click *Yes* to select the Action Completed Flag documenting that the action has been completed. When you choose *Yes*, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 56. Click 🥙 to validate entry,
- 57. Click 🔄 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 58. Click 🧟 to return to the SAP Easy Access screen,



You should execute T-code PA20 to review the PA and <u>infotypes</u> to which you made changes in this transaction, Each personnel action completed should be documented by adding a note (T-code PA30) to the record saved on the <u>infotype 0000</u> (Actions).



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Infotypes Used

Infotypes found in Initial Appointment PAs

Infotype #	Description	More Info
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	()
0016	Contract Elements	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	()
0185	Personal IDs	()
0105	Communications	
0487	Security/Medical Clearance	
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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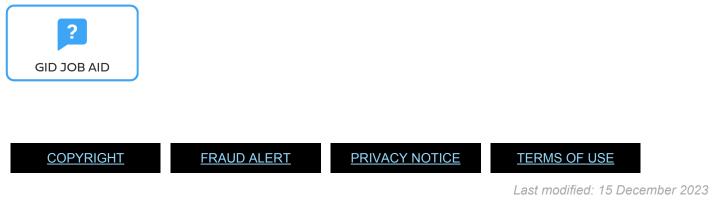
Last modified: 18 March 2022

10. Initial Appointment – Temporary (Local)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	Prerequisites - general
PRACTICE	

The first step in the process is to ensure that the candidate has an Index Number. If you have not yet requested an Index Number for the new staff member (see the procedures in the GID job aid below).



10.1. Initial Appointment Temporary – Local

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of national temporary initial appointments and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – ST/SGB/2018/1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

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Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.12: Temporary appointment

Administration of Temporary Appointments – ST/AI/2010/4/Rev.1

Rules in setting the EOD dates

"Medical Clearances - ST/AI/2018/4

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 24</u> Article 21: Participation

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10.2. Initial Appointment – Temporary

As a best practice, familiarize yourself with the <u>infotypes</u> used in this procedure.

Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.

☞ <u>M</u> enu	<u>E</u> dit	<u>F</u> avorites	Extr <u>a</u> s	S <u>y</u> stem	<u>H</u> elp	
PA4	0		· « 📙	। 🗟 🚫	👷 I 🖨	ሸ ሹ
Enter > Ea	asy Ac	cess				
	> 1 🔸	÷ 1	-			

- 2. Click 🧭 button
- 3. Enter the staff member's Index Number in the Personnel No. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box. This date must be the actual reporting date.
 - b. Click to display the list of options for the Reason for Action.

Personnel Action	IS		
•			
Find by * A Person Collective searc M Search Term	Personnel No. Pers Start	.Assgn	
• 🛗 Free search	Personnel Actions		
	Action Type	Personn EE group	EE subg
	*** APPOINTMENT ***		•
	Pre Boarding		_
	Initial Appointment		
	Reappointment		
	Reappointment After Retirement		
	Reappointment w/o Break		
	Reinstatement		
	Renewal/Extension of Appt		
	Conversion of Annointment		

- 4. Click Solution to validate entries.
- 5. Click W to execute the personnel action.

	Personnel Actions
۲	

6. Click to display the list of options for <u>Reason for Action</u>

Action Type	Initial Appointment	*
iccion type		

- 7. Click Replacement on Temp Assign to select. 1
- 8. Click 🗹 to confirm selection.

ActR	Name of reason for action
01	Initial Appointment
04	Interagency Transfer
07	Interagency Rem Loan
10	Interagency Non Reimb Loan
11	Secondment (incoming)
30	*** Only For Temp Appts ***
31	Emerg Surge Natural Disaster
33	Emerg Surge Conflict/Violence
35	Seasonal/peak work requirement
37	Replacement on Special Leave
39	Replacement on Sick Leave
41	Replacement on Maternity Leave
43	Replacement on Paternity Leave
45	Replacement on Temp Assign
47	Temp Appt Pending Selection
49	Special Project Finite Mandate
51	Temp Conf Language Staff
53	WAE Conf Language Staff
55	WAE non-Language Staff
60	Others



Temporary appointment options are to be chosen between reasons 31 and 60 only as follows:

- Emerg Surge Natural Disaster: Used for staff members that are recruited for temporary positions created to deal specifically with natural disasters
- Emerg Surge Conflict/Violence: Used for staff members that are recruited for temporary positions created to deal specifically with conflict and violence issues
- Seasonal/peak work requirement: Used for staff members that are recruited for positions created to meet the demands of seasonal/peak work periods of limited duration (e.g. temporary positions created during the General Assembly period)
- **Replacement on Special Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Special Leave
- **Replacement on Sick Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Sick Leave
- Replacement on Maternity Leave: Used for staff members that are recruited on a

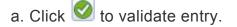
position that is currently vacant because the incumbent is on Maternity Leave

- **Replacement on Paternity Leave**: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Paternity Leave
- Replacement on Temp Assign: Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Temporary Assignment
- **Temp Appt Pending Selection**: Used for staff members that are recruited on a position that is currently vacant and the selection process is underway
- Special Project Finite Mandate: Used to recruit staff members to work on a project with

a finite mandate and a duration of less than one year

- **Temp Conf Language Staff**: Used for language staff members that are recruited temporarily on a language position
- WAE Conf Language Staff: Used for language staff members that are recruited on a language position but will be paid on a When-Actually-Employed basis
- WAE non-Language Staff: Used for staff members that are recruited on a nonlanguage position and that will be paid on a When-Actually-Employed basis
- Others: Used for other reasons not covered under any of the options above
- 9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above



- 10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.
 - If any of these values are incorrect make sure you have entered the correct Position

number, and correct if necessary.

- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

a. Click 🧭 to validate entry.

- 11. Click \square to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the staff member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.
 - Update any missing fields, as applicable, based on the staff member's **original verified** documentation.
 - For example, if the staff member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

a. Click 🧭 to validate entry

- 13. Click \square to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u>.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

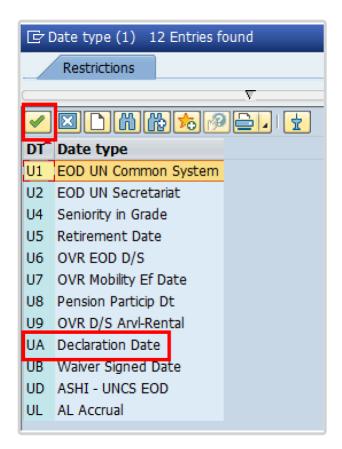
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Temporary appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after 01.01.2014)
 - U1 EOD UN Common System [ddmmyyyy] ()
 - U2 EOD UN Secretariat [ddmmyyyy] ⁽¹⁾
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date [ddmmyyyy] in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Temporary*.

Contractual Regulations					
Contract Type	Fixed Term	•	Valid Until		
Additional fields	Continuing Fixed Term	+			
Rules Series ID	Temporary Consultant		•		
Status ID	Ind. Contractor		•		
Recruitment. Indicator	UN Volunteer UN Police Officer	11		•	
Contract Status	Military Observer	22		•	
Contract Term	Staff Officer Non-staff Others			-	
Contractual Payment State	Govt Provided Person			-	
	Language IC Non Active Status	-			
	Not Applicable	¥			
Remarks					

- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click Yes.

Additional fields			
Rules Series ID	N.	-	
Status ID	CRB recruit	ment 🔻	
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Payment	t Status Order	Prorated	•

24. Select the appropriate option for <u>Contract Status</u> from the dropdown menu. Click Other.

Additional fields		
Rules Series ID	•	
Status ID	*	
Recruitment. Indicator	No	*
Contract Status		
Contract Term	Expert	Ī
Contractual Payment Status Order	Geographical Language	
	Other	
Remarks	Retiree Retiree - language	

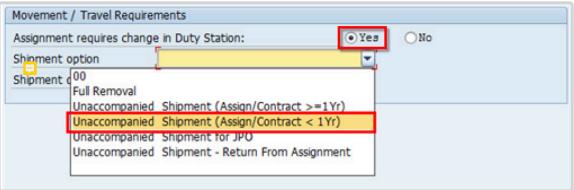
- 25. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 26. Click \square to save the record.
- 27. Click 🗹 to acknowledge the message

Message Text Start date after initi		
C Denie Anee nieel une	al entry date (03.08.2015)	
2 orane obce areer mile	arenuy date (05.06.2015)	9

28. Click to select the <u>NPO Assignment Type</u>. All initial appointments are **permanent movements**.

3	Select	Assignment Type			
	Туре	Description			[]]
	LO	Loan to another Agency			
	PM	Permanent Movement			
	SE	Secondment to another Ag			
	ZA	Separated / Retired			
	SL	Special Leave Without Pay			
	TA	Temporary Assignment			
					*
					-
	4 Þ		4	۲	
Se	elect	Cancel			

- 29. Click Select to confirm selection.
- 30. Click Unaccompanied Shipment (Assign/Contract <1Yr) for temporary appointments. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the staff member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.



31. Click *RLG:* \$1500 for s/m only on Shipment details list.

Movement / Travel Re	quirements	
Assignment requires ch	hange in Duty Station:	Yes No
Shipment option	Unaccompanied Shipment (Assign/C	•
Shipment details		
	00	
	Unacc shipment : 100 Kg	
	RLG : \$1500 for s/m only	

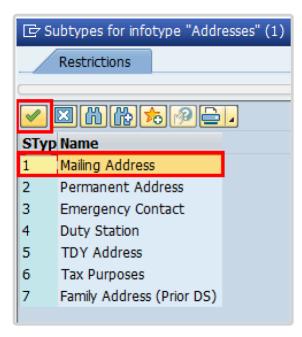
- a. Click 💽 to validate selection.
- 32. Click 🗹 to acknowledge the message

y. Message Text	Det.
Start date after initial entry date (03.08.2015)	Q

33. Click 🕑 to validate values.

🖙 Infotype	<u>E</u> dit <u>G</u> oto	Extras	S <u>v</u> stem	Help
		• « 日	🔕 🔕	😪 🗁 🕅 🏠 🏝 🏝 🛱 🚍 🖂 🖳 🖳
Create N	PO Assigi	nment (.	3344)	
🔊 🕞 🧟				

- 34. Click \square to save the record.
- 35. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.



a. Click 🗹 to confirm selection,

- 36. Enter the details of the Staff Member's mailing address.
 - a. Click 🕑 to validate selections,
- 37. Click \blacksquare to save the record.
- 38. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 39. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Nork schedule rule	NORM UNHQ Normal 8hrs		
Time Mgmt status	9 - Time	evaluation of planned times	-



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Please be sure to select a valid work schedule and that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this infotype as time evaluation will not run properly.



a. Click 🗹 to validate selections. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.

- 40. Click \square to save the record.
- 41. You **MUST** enter the Pay scale Group and Level information for this infotype then **validate and save** or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

1. Click Solution to validate entries. You may have to click Solutions more than once to acknowledge messages at the bottom of the screen.

¢	Infotype	Edit	Goto	Wage types		System	
0			•] « 日 🛛	😪 😪		11112
4	Create B	asic l	Pay (O	008)			

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42. Click ⊟ to save the record.

43. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for the

|_. Fund Details Status |_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months.|*Standard Schema*: This indicates the Staff Member is part of standard Pension Participation.| | **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months.

Validating: Should not be used for Initial Appointment or Reappointment. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.|

PF Number			Reason		
Fund Details					
Status	Contributing	•	Participation date	01.09.2015	
Schema	Standard Schema	-			

a. Click 🕑 to validate the values.

¢	Infotype	Edit	<u>G</u> oto	Extr <u>a</u> s	S <u>y</u> stem	Help
0			•] < 🖯	🔕 🙆	😪 । 🗁 🕅 🏠 । 🏝 🏝 🛱 । 🚍 🖻 । 🥝 💻
(Create N	PO P	ensio	n Fund	ls (096	51)

- 44. Click \blacksquare to save the record.
- 45. The next infotype requires you to save personal ID information. It is imperative to add the permanent resident information if the Staff Member has a permanent residence status in another country.

Additionally, the visa and the passport information should always be entered. Click *Passport*.



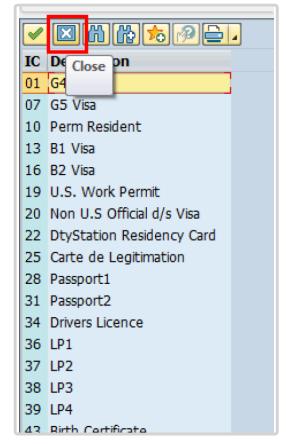
- 46. Click 🗹 to confirm selection,
- 47. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxxx]
 - Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

- 48. Click \blacksquare to save the record.
- 49. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank accounts in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- 50. Minimally, you should record an email address for the Staff Member Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

	◙╓╠╞╸╔╴
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

- 51. Click 🗹 to confirm selection.
- 52. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🔮 to validate entry,
- 53. Click \blacksquare to save the record.
- 54. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 55. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the<u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> <u>0487</u> with a new effective date, the same as the effective date of this PA you are

executing.

a. Click 🕒 to continue with the PA



56. For temporary appointments, you should minimally record the Staff Member's: **Place of Recruitment:**

Used to record the place from which the Organization recruited and travelled the Staff Member upon initial appointment or reappointment.

- NPO Entitlement Country and City Menu Key
 - a. Click RECR label

	3 M M 📩 🔊 🖨 🗸	
ST	me	
нс	ce of Home Leave	
PFV	Place of family visit	
PHC	Place of Home Country	
POR	Place of residence - Temp Lang	
PPD	Place of Professional domicile-Temp Lang	
PPR	Place of Permanent Residence	
RECR	Place of Recruitment	
ROCD	Residence outside commuting distance	

- 57. Click \checkmark to confirm selection.
- 58. Enter the Country and City, and Airport Code for the place of Recruitment. Click on World Airport Codes to identify the airport code.

ry and City
RECR Place of Recruitment

a. Click 🧭 to validate entry,

- 59. Click \blacksquare to save the record.
- 60. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click 🖾 to proceed to the next infotype.
- 61. The <u>infotype 9003</u> (Entitlement Monitoring), in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 62. Click 🕑 to validate entry,
- 63. Click 😾 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 64. Click 🧖 to return to the SAP Easy Access screen,



You should execute T-code PA20 to review the PA and <u>infotypes</u> to which you made changes in this transaction. Each personnel action completed should be documented by adding a note (T-code PA30) to

the record	saved on the <u>infotype</u>	<u>• 0000</u> .	
? GID JOB AID			
<u>COPYRIGHT</u>	FRAUD ALERT	PRIVACY NOTICE	TERMS OF USE

Last modified: 15 December 2023

Infotypes Used

Infotypes found in Temporary Appointment PAs

Infotype #	Description	More Info
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	(1)
0016	Contract Elements	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	()
0185	Personal IDs	
0105	Communications	
0487	Security/Medical Clearance	

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9003

Entitlement Monitoring

Click on Infotypes below for a complete list.



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Last modified: 18 March 2022

11. Reappointment – Fixed Term (Local)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	PREREQUISITES - GENERAL
PROCEDURE	INFOTYPES

The first step in the process is to ensure that the candidate has a valid Index Number. If you have not yet reviewed/requested an Index Number for the former staff member (see the procedures in the GID job aid below).



These regulations, rules, policies and standard operating procedures (SOP) apply to administration of national fixed terms reappointment and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Article IV Appointment and promotion Staff Regulation 4.1

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

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Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.13: Fixed-term appointment

<u>Staff Rule 4.17: Re-Employment</u> Section 3: Appointment and re-employment

Administration of Fixed Term Appointments – ST/AI/2013/1/Corr.1

Rules in setting the EOD dates

"Medical Clearances – <u>ST/AI/2018/4</u>

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 24</u>

Article 21: Participation



11.2. Reappointment – Fixed Term

As a best practice, familiarize yourself with the <u>infotypes</u> used in this procedure.

Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.

🖙 <u>M</u> enu <u>E</u> dit	<u>F</u> avorites	Extr <u>a</u> s	S <u>y</u> stem	<u>H</u> elp	
Ø PA40	•	« 📙	I 🗟 🚱	👷 I 🚔	ሸ ሹ
Enter Easy A	ccess				
🗔 🖙 👌 🖄	📐 🦕 🖉 1	• •			

- 2. Click 🙆 button
- 3. Enter the staff member's Index Number in the Personnel No. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box. This date must be the actual reporting date.
 - b. Click \square to display the list of options for the Reason for Action.

Personnel Action	\$				
Q					
Find by * A Person • M Collective searc • M Search Term • M Free search	Personnel No. Pers Start	s.Assgn			
BB rice search	Personnel Actions				
	Action Type	Personn E	EE group	EE subg	
	*** APPOINTMENT ***				*
	Pre Boarding				-
	Initial Appointment				-
1	Reappointment				
	Reappointment After Retirement				
	Reappointment w/o Break				
	Reinstatement				
	Renewal/Extension of Appt				
	Conversion of Annointment				

- 4. Click Solution to validate entries.
- 5. Click W to execute the action.



6. Click \Box to display the list of options for Reason for Action.

Action Type	Initial Appointment	
Reason for Action	Ta l	

- 7. Click Initial Appointment to select.
- 8. Click 🗹 to confirm selection.

Restrictions	
Action Type: 05 Name of action type: Initial Appointment ActR [®] Name of reason for action 01 Initial Appointment	
Action Type: 05 Name of action type: Initial Appointment ActR [•] Name of reason for action 01 Initial Appointment	
ActR ^A Name of reason for action	
01 Initial Appointment	
04 Interagency Transfer	•
07 Interagency Rem Loan	
10 Interagency Non Reimb Loan	
11 Secondment (incoming)	
30 *** Only For Temp Appts ***	
31 Emerg Surge Natural Disaster	
33 Emerg Surge Conflict/Violence	
35 Seasonal/peak work requirement	
37 Replacement on Special Leave	
39 Replacement on Sick Leave	
41 Replacement on Maternity Leave	
43 Replacement on Paternity Leave	
45 Replacement on Temp Assign	
47 Temp Appt Pending Selection	
49 Special Project Finite Mandate	
51 Temp Conf Language Staff	
53 WAE Conf Language Staff	
55 WAE non-Language Staff	
60 Others	

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

a. Click 🧭 to validate entry.

- 10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.
 - If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
 - If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
 - If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🕑 to validate entry.
- 11. Click \blacksquare to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal

documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Job Aid.

- Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
- For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

a. Click 🕑 to validate entry

- 13. Click \blacksquare to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u>.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

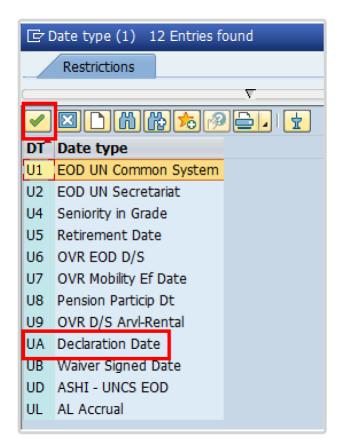
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click 🕑 to validate values. You may have to click 🥙 multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Fixed-Term appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after 01.01.2014]
 - U1 EOD UN Common System [ddmmyyyy] (1)
 - U2 EOD UN Secretariat [ddmmyyyy] ⁽¹⁾
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Fixed Term*.

Contract Type	Fixed Term	J.		Valid Until		V	
	Fixed Term			Valu Offici			
Additional fields	Consultant	*					
Rules Series ID	Ind. Contractor		-				
Status ID	UN Volunteer		-				
Recruitment. Indicator	UN Police Officer Military Observer				-		
Contract Status	Staff Officer	111			•		
Contract Term	Non-staff Others Govt Provided Person				•		
Contractual Payment State					•		
	Non Active Status	*					
Remarks	Not Applicable	Ŧ					

- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. Select the appropriate option as the method of recruitment from the <u>Status ID</u> dropdown menu.

Additional fields		
Rules Series ID	_	
Status ID	_	
Recruitment. Indicator	CRB recruitment	-
Contract Status	GS & Rel Recruit Exam	-
Contract Term	NCRE [prior 2011]	-
Contractual Payment Sta	Prof Lang Comp Exam	•
Remarks	Top Echelon Appointment GS Competitive Exam Prof Lang Coord Exam Assoc Tran. Support Exam Lang Teacher Exam	

If the Staff Member has been provisionally appointed pending the completion of reference checks this option should be left blank.

24. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Additional fields					
Rules Series ID		-			
Status ID	CRB recruitment				
Recruitment. Indicat	tor	No			
Contract Status		No			
Contract Term		Yes			
Contractual Paymen	t Status Order	Prorated	•		

25. Select the appropriate option for <u>Contract Status</u> from the dropdown menu. Click Other.

Additional fields	
Rules Series ID	-
Status ID	•
Recruitment. Indicator	No
Contract Status	
Contract Term	Expert
Contractual Payment Status Order	Geographical Language
	Other
Remarks	Retiree Retiree - language

- 26. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🧭 to validate entries.
- 27. Click 🗹 to acknowledge the message

🖻 Display Messages	
Ty Message Text	Det.
△ Start date after initial entry date (03.08.2015)	g
Correct erro	rs 🕄 🕜 🔗 Technical Information 🚺 🕷

- 28. Click 🕑 to validate values.
- 29. Click \blacksquare to save the record.
- 30. Click to select the <u>NPO Assignment Type</u> All initial appointments are **permanent movements**.

🖙 Infotype Edit	<u>G</u> oto Extr <u>a</u> s S <u>y</u> stem <u>H</u> elp
	💌 🗧 🧟 🕲 🖨 🕅 🖄 🗳 🖨 💭 💭 🔜 🖉 🖳
Create NPO	ssignment (3344)
la 🖪 🧟	

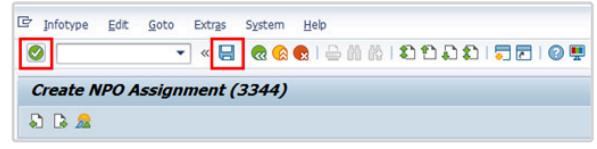
- 31. Click Select to confirm selection.
- 32. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.

Movement / Travel Requi	rements
Assignment requires char	ige in Duty Station: ONO
Shipment option	Unaccompanied Shipment (Assign/C
Shipment details	RLG : \$15,000 @ Dependent rate

a. Click 🕑 to validate selection.

33. Click 🗹 to acknowledge the message

34. Click 🥙 to validate values.



- 35. Click \square to save the record.
- 36. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.



a. Click 🗹 to confirm selection,

- 37. Enter the details of the Staff Member's mailing address.
 - a. Click 🗹 to validate selections,
- 38. Click \blacksquare to save the record.
- 39. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 40. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Please be sure to select a valid work schedule and verfity that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do not skip this infotype as time evaluation will not run properly.



a. Click Solution to validate selections. You may have to click Solution more than once to acknowledge messages at the bottom of the screen.

- 41. Click \square to save the record.
- 42. You **MUST** enter the Pay scale Group and Level information for this infotype then validate and save or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate.

Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

a. Click Solution to validate entries. You may have to click Solution more than once to acknowledge messages at the bottom of the screen.



- 43. Click 😾 to save the record.
- 44. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for the

|_. Fund Details Status |_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months.|*Standard Schema*: This indicates the Staff Member is part of standard Pension Participation.| | **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months.

Validating: Should not be used for Initial Appointment or Reappointment. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.|

NPO Pension Fu	nds			
PF Number			Reason	•
Fund Details				
Status	Contributing	•	Participation date	01.09.2015
Schema	Standard Schema	-		

The system automatically set the Staff Member's status to Contributing because of their Fixed-Term appointment. Also, note that the Participation date is automatically

generated by the system and cannot be changed.

a. Click 🕑 to validate the values.

🔄 Infotype	Edit	Goto	Extr <u>a</u> s	System	Help
0		•] < 日	🔕 🔕	😪 । 🗁 🕅 🕼 । 🎝 🗅 💭 🎝 । 🥽 🛃 । 🎯 🖳
Create N	IPO P	ensio	n Fund	ls (096	1)

- 45. Click \square to save the record.
- 46. You should record all passports and visas held by the Staff Member. Click Passport.

\checkmark	◙╓╠҂╗╝╘╷
IC	Description
01	G4 Visa
07	G5 Visa
10	Perm Resident
13	B1 Visa
16	B2 Visa
19	U.S. Work Permit
20	Non U.S Official d/s Visa
22	DtyStation Residency Card
25	Carte de Legitimation
28	Passport1
31	Passport2
34	Drivers Licence
36	LP1
37	LP2
38	LP3
39	LP4
43	Birth Certificate
46	Marriage Certificate

- 47. Click 🗹 to confirm selection,
- 48. Complete the field for Passport1
 - ID number [xxxxxxx]

- Date of issue [ddmmyyyy]
- Valid to [ddmmyyyy]
- Place of issue [xxxxxx]
- Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

- 49. Click \blacksquare to save the record.
- 50. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank accounts in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN

emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click I to proceed to the next infotype.
- 51. Minimally, you should record an email address for the Staff Member. Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

	◙╓╠р
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

- 52. Click 🗹 to confirm selection.
- 53. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 54. Click \blacksquare to save the record.
- 55. Follow the steps above to enter all available forms of Communication. When complete, click 🖾 to proceed to the next infotype.
- 56. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> <u>0487</u> (Security/Medical Clearance) with a new effective date, the same as the effective

date of this PA you are executing.

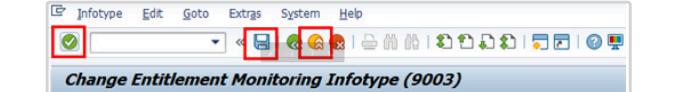
a. Click 🕒 to continue with the PA

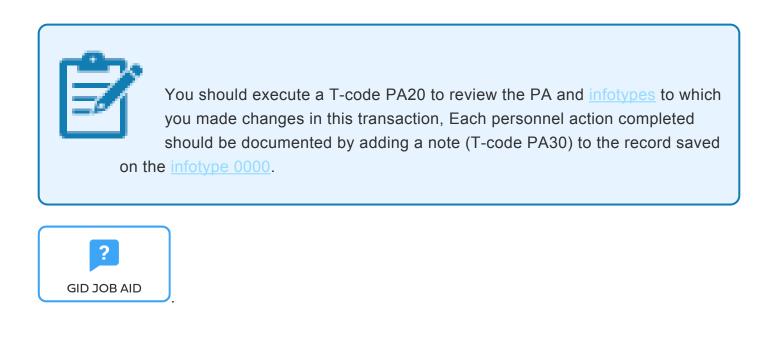


57. For fixed-term appointments, you should minimally record the Staff Member's **Place of Recruitment:**

Used to record the place from which the Organization recruited and travelled the Staff Member upon initial appointment or reappointment.

- <u>NPO Entitlement Country and City Menu Key</u>
 - a. Click 🕑 to validate entry,
- 58. Click \blacksquare to save the record.
- 59. Click \blacksquare to proceed to the next infotype.
- 60. The <u>infotype 9003</u> (Entitlement Monitoring), in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 61. Click 🥙 to validate entry,
- 62. Click 🗐 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 63. Click 🧟 to return to the SAP Easy Access screen,





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Infotypes I	lsed		

Infotypes found in Reappointment Fixed Term PAs

Infotype #	Description	More Info.
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	(i)
0016	Contract Elements	
0006	Addresses	
0007	Planned Working Time	

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0008	Basic Pay	
0961	NPO Pension Funds	i
0185	Personal IDs	i
0105	<u>Communications</u>	
0487	Security/Medical Clearance	
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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12. Reappointment – Temporary (Local)

Before proceeding you should become familiar with the following information:

REGULATIONS, RULES, POLICIES AND SOPS	Prerequisites - general
	INFOTYPES

Local Staff as defined by SR 4.4.

SR 4.4 -Staff in posts subject to local recruitment

a) All staff in the General Service and related categories, except as stipulated in staff rule 4.5 (
c) below, shall be recruited in the country or within commuting distance of each office,
irrespective of their nationality and of the length of time they may have been in the country.
The allowances and benefits available to staff members in the General Service and related
categories shall be published by the Secretary-General for each duty station.

b) National Professional Officers shall be of the nationality of the country where the office concerned is located.

c) A staff member subject to local recruitment under this rule shall not be eligible for the allowances or benefits indicated under staff rule 4.5 (a).

The first step in the process is to ensure that the candidate has a valid Index Number. If you have not yet reviewed/requested an Index Number for the former staff member (see the procedures in the GID job aid below).



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12.1. Reappointment Temporary – Local

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of national (see Staff Rule 4.4) temporary reappointment and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u>

Staff Rule 1.5: Notification by staff members and obligation to supply information

Staff Rule 4.1: Letter of appointment

Staff Rule 4.2: Effective date of appointment

Staff Rule 4.3: Nationality

Staff Rule 4.4 Staff in posts subject to local recruitment

Staff Rule 4.12: Temporary appointment Section 3: Appointment and re-employment Section 5: Eligibility Section 7: Salaries and related allowances Section 10: Medical insurance

Staff Rule 4.17: Re-Employment

Administration of Temporary Appointments – ST/AI/2010/4/Rev.1 Section 2: Use and duration of temporary appointments

Rules in setting the EOD dates

"Medical Clearances – <u>ST/AI/2018/4</u>

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

<u>UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff</u> <u>Pension Fund – JSPB/G.4/Rev. 25</u>

Article 21: Participation

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As a best practice, familiarize yourself with the infotypes used in this procedure.

Procedure

1. Start the transaction using the menu path or transaction code, e.g.PA40.



- 2. Click 🙆 button
- 3. Enter the staff member's Index Number in the Personnel No. text box.
 - a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box. This date must be the actual reporting date.
 - b. Click to display the list of options for the Reason for Action.

Personnel Action	ıs					
•						
Find by * & Person * M Collective searc * M Search Term * M Free search	Personnel No. Pers	s.Assgn				
- In Free search	Personnel Actions					
	Action Type	Personn EE group	EE subg			
	*** APPOINTMENT ***		•			
	Pre Boarding		_			
	Initial Appointment					
	Reappointment					
	Reappointment After Retirement					
	Reappointment w/o Break					
	Reinstatement					
	Renewal/Extension of Appt					
	Conversion of Annointment					

- 4. Click 🕑 to validate entries.
- 5. Click W to execute the Personnel Action.

2	Personnel Actions

6. Click 🗇 to display the list of options for Reason for Action

Action Type	Initial Appointment	
Reason for Action		

- 7. Click Replacement on Temp Assign to select. ()
- 8. Click \checkmark to confirm selection.

ActR	Name of reason for action
01	Initial Appointment
04	Interagency Transfer
07	Interagency Rem Loan
10	Interagency Non Reimb Loan
11	Secondment (incoming)
30	*** Only For Temp Appts ***
31	Emerg Surge Natural Disaster
33	Emerg Surge Conflict/Violence
35	Seasonal/peak work requirement
37	Replacement on Special Leave
39	Replacement on Sick Leave
41	Replacement on Maternity Leave
43	Replacement on Paternity Leave
45	Replacement on Temp Assign
47	Temp Appt Pending Selection
49	Special Project Finite Mandate
51	Temp Conf Language Staff
53	WAE Conf Language Staff
55	WAE non-Language Staff
60	Others



Temporary appointment options are to be chosen between reasons 31 and 60 only as follows:

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- a. Click 🕑 to validate entry.
- 10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The Employee group":#employee-group-menu and Employee subgroup fields are automatically populated based on the Organizational Management information for the position.

- If any of these values are incorrect make sure you have entered the correct Position number, and correct if necessary.
- If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.
- If the Employee group and/or subgroup are incorrect, enter the correct values.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🕑 to validate entry.
- 11. Click \blacksquare to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Requestor Job Aid.
 - Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
 - For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.



Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

- a. Click 💟 to validate entry
- 13. Click \square to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information established in <u>infotype 0000</u>.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

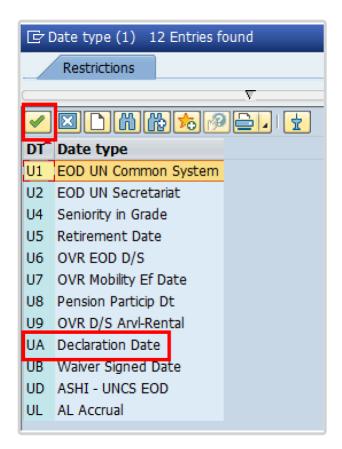
* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click ⊟ to save the record.
- 16. For a Temporary appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after 01.01.2014)
 - U1 EOD UN Common System [ddmmyyyy] 🕕
 - U2 EOD UN Secretariat [ddmmyyyy] ()
 - U4 Seniority in Grade [ddmmyyyy]
 - U5 Retirement Date [ddmmyyyy]
 - You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.



- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date [ddmmyyyy] in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click *Temporary*.

Contractual Regulations			
Contract Type	Fixed Term	-	Valid Until
Additional fields	Continuing Eixed Term	+	
Rules Series ID	Temporary Consultant		•
Status ID	Ind. Contractor		
Recruitment. Indicator	UN Police Officer Military Observer Staff Officer Non-staff Others		•
Contract Status		11	•
Contract Term			•
Contractual Payment State			•
	Non Active Status	-	
Remarks	Not Applicable	*	

- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click Yes.

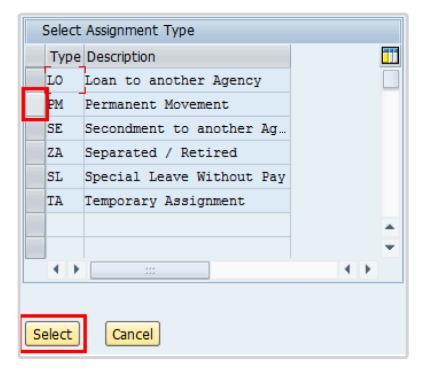
Additional fields			
Rules Series ID		· ·	
Status ID	CRB recruit	CRB recruitment	
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Paymen	t Status Order	Prorated	•

24. Select the appropriate option for <u>Contract Status</u> from the dropdown menu. Click Other.

Additional fields		
Rules Series ID	•	
Status ID	*	
Recruitment. Indicator	No	-
Contract Status		
Contract Term	Expert	
Contractual Payment Status Order	Geographical Language Limited	
	Other	
Remarks	Retiree Retiree - language	

- 25. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 26. Click \square to save the record.
- 27. Click 🗹 to acknowledge the message

28. Click to select the <u>NPO Assignment Type</u>. All initial appointments are **permanent movements**.



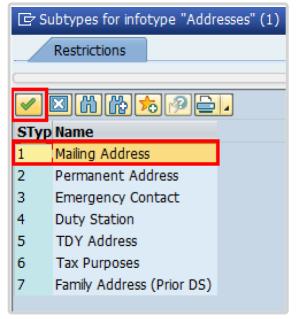
- 29. Click Select to confirm selection.
 - a. Click 🕑 to validate selection.
- 30. Click \checkmark to acknowledge the message

🖻 Display Messages	
Ty Message Text	Det.
Start date after initial entry date (03.08.2015)	g
Correct errors 🕄 🕜 🗞	Technical Information

31. Click 🕑 to validate values.

🔄 Infotype	<u>E</u> dit <u>G</u> oto	Extr <u>a</u> s Syster	n <u>H</u> elp			
	-) « 日 🛛 🤇	8 😪 🗁 // // / 🗈 🗅 🗗 📭 🖉 💻			
Create NPO Assignment (3344)						
🔊 🖪 🧟						

- 32. Click \blacksquare to save the record.
- 33. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information.



- a. Click 🗹 to confirm selection,
- 34. Enter the details of the Staff Member's mailing address.
 - a. Click 🔮 to validate selections,
- 35. Click \square to save the record.
- 36. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype,
- 37. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Work schedule rule	NORM	UNHQ Normal 8hrs	
Time Mgmt status	9 - Time	9 - Time evaluation of planned times	

Λ

Please be sure to select a valid work schedule and that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 – no time evaluation time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do Not skip this infotype as time evaluation will not run properly.



a. Click Solution to validate selections, You may have to click Solutions more than once to acknowledge messages at the bottom of the screen.

- 38. Click \square to save the record.
- 39. You **MUST** enter the Pay scale Group and Level information for this infotype then **validate and save** or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. Once the infotype has been saved the correct date will automatically populate in this field. DO NOT enter the date in the field provided as this field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

1. Click 🗹 to validate entries. You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.



- 40. Click \blacksquare to save the record.
- 41. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for the

|_. Fund Details Status |_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months.|*Standard Schema*: This indicates the Staff Member is part of standard Pension Participation.| | **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months.

Validating: Should not be used for Initial Appointment or Reappointment. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.| p((((.

F Number			Reason	
Fund Details				
Status	Contributing	•	Participation date	01.09.2015
Schema	Standard Schema	-		

a. Click 🥙 to validate the values.

🔄 Infotype	Edit	<u>G</u> oto	Extr <u>a</u> s	S <u>v</u> stem	Help		
0		•] « 日	🔕 🚫	👷 । 🗁 🕅 🏠 🕄 🔁 🖓 💭 💭 💭 🔛 । 🥝 🖳		
Create NPO Pension Funds (0961)							

- 42. Click 😾 to save the record.
- 43. The next infotype requires you to save personal ID information. It is imperative to add

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the permanent resident information if the Staff Member has a permanent residence status in another country.

Additionally, the visa and the passport information should always be entered. Click *Passport*.



- 44. Click 🗹 to confirm selection,
- 45. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxx]
 - Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

46. Click \square to save the record.

47. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number

	◪◚;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;					
IC	De Close pn					
01	G4					
07	G5 Visa					
10	Perm Resident					
13	B1 Visa					
16	B2 Visa					
19	U.S. Work Permit					
20	Non U.S Official d/s Visa					
22	DtyStation Residency Card					
25	Carte de Legitimation					
28	Passport1					
31	Passport2					
34	Drivers Licence					
36	LP1					
37	LP2					
38	LP3					
39	LP4					
42	Rirth Cortificato					

• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

a. When completed, click is to proceed to the next infotype.

48. Minimally, you should record an email address for the Staff Member Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

		◙╓╠ӽ७₽₽╻
	STyp	Name
	0001	System user name (SY-UNAME)
	0005	Fax
	0010	UN Email Address
	0020	UN Office Telephone
	CELL	Cell phone
	MAIL	Personal Email Address
	PAGR	Pager
	U003	Radio Call Sign
	U006	Data Line
	U007	Telex Line
	U008	Satellite Phone
	U009	Dect Phone
	U010	Trunking Radio
	U011	Pension system ID Num
I		

- 49. Click 🗹 to confirm selection.
- 50. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🧭 to validate entry,
- 51. Click \blacksquare to save the record.
- 52. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 53. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record exists, and should be the record you verified prior to executing this PA. In this case, you must skip this record as saving this record during the execution of the PA will create a new, duplicate record in <u>infotype</u> <u>0487</u> (Security/Medical Clearence) with a new effective date, the same as the effective

date of this PA you are executing.

a. Click 🗳 to continue with the PA



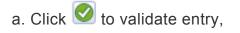
54. For temporary appointments, you should minimally record the Staff Member's **Place of Recruitment:**

Used to record the place from which the Organization recruited and travelled the Staff Member upon initial appointment or reappointment.

a. Click RECR label

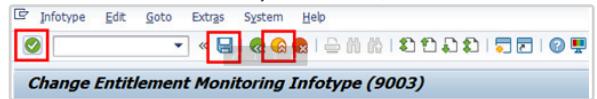


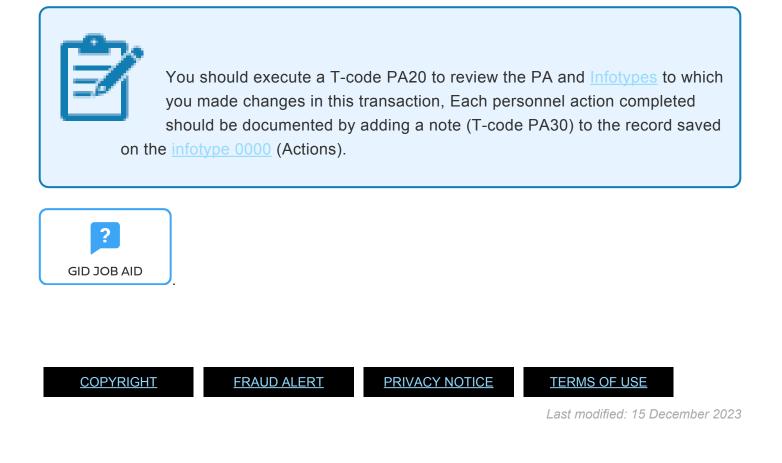
55. Click \checkmark to confirm selection.



- 56. Click \blacksquare to save the record.
- 57. Click \bowtie to proceed to the next infotype.

- 58. The infotype 003 (Payroll Status) in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below.
- 59. Click 🧭 to validate entry,
- 60. Click 🔄 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.
- 61. Click 🧟 to return to the SAP Easy Access screen,





Infotypes Used

Infotypes found in Reappointment Temporary PAs

Infotype #	Description	More Info.
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	1
0016	Contract Elements	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0961	NPO Pension Funds	1
0185	Personal IDs	1
0105	Communications	
0487	Security/Medical Clearance	
9003	Entitlement Monitoring	

Click on Infotypes below for a complete list.



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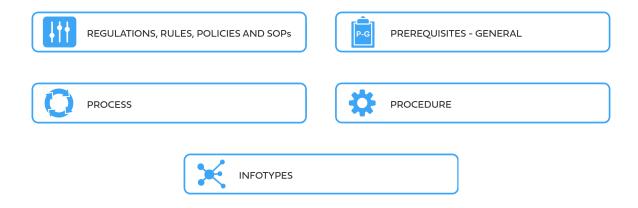
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Last modified: 18 March 2022

13. Special Movements

Secondment, Transfers, and Loans from the Common System

Before proceeding you should become familiar with the following information:



For staff members coming to the Secretariat on Secondment, Interagency Transfer, or Interagency Loan for the first time, an Initial Appointment PA is executed, using the appropriate Reason for Action as follows:

- Interagency Rem Loan: for reimbursable loans from the Common System
- Interagency Non Reimb Loan: for non-reimbursable loans from the Common System
- Secondment (incoming): for secondments
- Interagency Movements (Loans, Secondments, Transfers)

However, please beware that:

• You must be particularly vigilant about entering the U1 date with the EOD UN common system

• If the staff is in receipt of mobility the effective date of the mobility should be adjusted in U7 and the seniority in grade in U4.

- The next WIG needs to be overriden in infotype 0008 (Basic Pay)
- The start date of the <u>infotype 3244</u> (NPO Entitlement Country and City)place of home leave must match the EOD common system date (U1)
- In <u>infotype 0960</u> (NPO Mobility and Hardship Allowance) you need to enter the additional counts for mobility if applicable.

• If infotype 2013 comes up to enter the AL balance contained in the administrative details of the Staff Member, DO NOT use. Skip this infotype and enter the AL balance and home leave

points after you execute the onboarding PA using a PA30 infotype 2012.

After the executing of the initial appointment PA:

• If you are processing incoming secondments or transfers, you will also need to enter the time served prior to joining the UN Secretariat in infotype 0552 using a PA30. This is so that the repatriation grant is properly computed upon separation.

• If you need to update the historical mobility records, you need to create an entry in infotype 9960 using a PA30.

The first step in the process is to ensure that the candidate has a valid Index Number. If you have not yet reviewed/requested an Index Number for the new Staff Member (see the procedures in the GID Requestor job aid below).



13.1. Special Movements

These regulations, rules, policies and standard operating procedures (SOP) apply to administration of special movements and have been developed over time. The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Article IV Appointment and promotion Staff Regulation 4.1

Status, basic rights and duties of United Nations staff members – ST/SGB/2016/9

Staff Rule 1.5 – Notification by staff members and obligation to supply information

Staff Rule 4.1 – Letter of appointment

Staff Rule 4.2 – Effective date of appointment

Staff Rule 4.3 – Nationality

Staff Rule 4.5 – Staff in posts subject to international recruitment

Staff Rule 4.11: Types of appointment

Staff Rule 4.13: Fixed-term appointment

Administration of Fixed Term Appointments – ST/AI/2013/1

Rules in setting the EOD dates

"Medical Clearances – ST/AI/2018/4

Section 2: Medical clearance for initial appointment

Section 3: Validity of medical documentation and medical clearance

Section 6: Procedures, forms and documentation for medical clearance on initial appointment

UNJSPF: Regulations, Rules and Pension Adjustment System of the United Nations Joint Staff Pension Fund – JSPB/G.4/Rev. 25

Article 21: Participation

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13.2. Interagency Movements (Loans, Secondments, Transfers)

In certain cases, United Nations common system staff members with permanent, continuing or fixed-term appointments may be eligible to proceed on transfer, secondment or loan from the UN Secretariat to an agency, fund or programme within the UN Common System that is a signatory to the *Inter-Organization Agreement Concerning Transfer, Secondment or Loan of Staff Among the Organizations Applying the United Nations Common System of Salaries and Allowances or vice versa*. The following paragraphs provide a brief summary of the agreement. Full information can be accessed in the <u>Inter-Organization Agreement</u> document.

The movements governed by the Inter-Organization Agreement are referred to in *inspira* as interagency movements, and for the relevant movements the *inspira* terms are referenced in this process guide. The movement is initiated once a suitable candidate is identified by the receiving organization following a selection process or a request from the receiving organization for a specific Staff Member for a limited period.

The Inter-Organization Agreement does not give any organization the right to transfer, second or loan a Staff Member to another organization without the Staff Member's consent. It does not of itself give the Staff Member rights which are enforceable against an organization. It merely sets out what the organizations will normally do. The agreement can only be enforced to the extent that either the organizations have included appropriate provisions in their administrative rules, or the parties have accepted to apply it in the individual case.

Loans, secondments and transfers are mechanisms to promote staff mobility within the UN Common system to foster the sharing of knowledge and expertise among UN common system organizations and to encourage career development.

- Interagency loans
- Interagency secondments
- Interagency Transfers
- <u>Secondment from government service</u>

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Interagency loans (definition from the Inter-Organization Agreement)

An interagency loan does not normally exceed one (1) year but can be further extended subject to the agreement of all parties. Loans usually result from temporary selections in the receiving organization. During the loan period, the staff member is subject to the administrative supervision of the receiving organization but has no contractual relationship with it. Staff members will continue to be subject to the Staff Regulations and Rules of the releasing organization and retain their contract with the releasing organization.

Loans can be **reimbursable**, (if the cost of the release of the staff will be given back to the

releasing organization), or **non-reimbursable**. At the end of the loan period, Staff Members are expected to return to the releasing organization unless they resign from their position in the releasing organization to transfer to the receiving organization. Loan agreements need to be prepared, usually by the releasing entity, for signatures of releasing entity, receiving entity and the Staff Member concerned. A provision on return right of the Staff Member is usually included in the loan agreement and highly recommended.

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Interagency secondments (definition from the Inter-Organization Agreement)

An interagency secondment is the movement of a staff member from one organization to another for a fixed period, normally not exceeding two years, during which the Staff Member will normally be paid by and, except as otherwise provided in the inter-organization agreement, be subject to the staff regulations and rules of the receiving organization, but will retain his or her rights of employment in the releasing organization. The period of secondment may be extended for a further fixed period by agreement among all the parties concerned.

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Interagency Transfers (definition from the Inter-Organization Agreement)

An interagency transfer is a permanent movement of a staff member from one organization to another with no right of return to the releasing organization. The candidate relinquishes contractual ties with the releasing organization and will be given another contract with the new organization. Employment by an organization of a former Staff Member of another organization, after a break in service not exceeding twelve months, may, with the agreement of the parties concerned, be treated as if it were a transfer. As the SMC VIII held in Sarajevo in April 2019, the Staff Management Committee agreed that "When a Staff Member with a permanent or continuing appointment joins the Secretariat through inter-agency transfer, they should be granted a continuing contract", was endorsed by the Secretary-General on 29 April 2019. It is thus reminded that effective from that date, any staff holding a career appointment (permanent, continuing or indefinite) who joins the UN Secretariat on inter-agency transfer, shall be granted a continuing appointment.

Service in the releasing organization will be counted for service credit purposes, as if it had been completed in the receiving organization at the duty stations where the Staff Member served.

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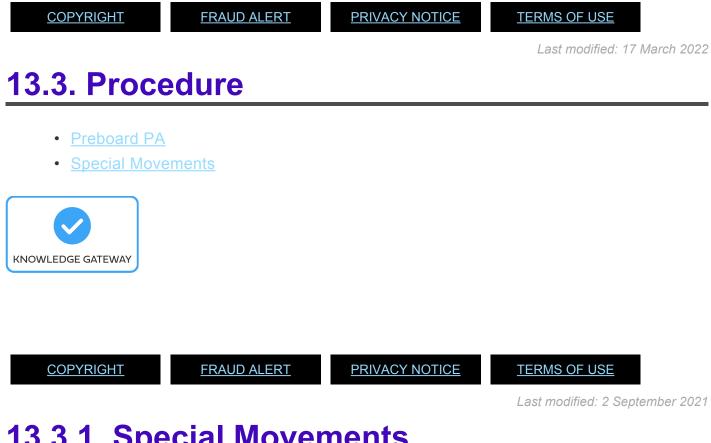
Last modified: 17 March 2022

Secondment from government service

All candidates who are selected for a Secretariat staff position who may have maintained a contractual relationship with a government, regardless of the level they are selected for, shall be recruited on secondment from their government unless they provide evidence that they have resigned and that their resignation was accepted by the government employer indicating the effective date of the resignation. All active-service military or police officers selected for seconded posts, receiving headquarters or mission appointments serve on secondment from their governments.

A secondment from a Member State is a recruitment of an individual serving with a government to serve in an entity of the Secretariat for a limited period. The individual is appointed, paid by and subject to the Regulations and Rules of the UN, but retains the right to return employment, advancement and pension rights in the releasing government upon separation from service with the United Nations.

The agreement to be recruited on secondment should be obtained from the Permanent Mission to the United Nations through a Note Verbale prior to the secondment of an individual, as well as for any extension of appointment. As per <u>ST/SGB/2016/9</u>, since being on a leave arrangement from an employer other than the UN may constitute a conflict of interest, any leave arrangement from government service while working for the UN should be addressed in a tripartite secondment agreement between the UN, the government and the staff member providing the terms of and conditions of such a secondment agreement.



13.3.1. Special Movements

As a best practice, familiarize yourself with the infotypes used in this procedure.

Procedure

Start the transaction using the menu path or transaction code, e.g.PA40. 1.



- 2. Click 🙆 button
- Enter the staff member's Index Number in the Personnel No. text box. 3.

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.

- a. Enter the effective date [ddmmyyyy] of the appointment in the Start text box. This date must be either the travel date or the actual reporting date.
- b. Click to display the list of options for the Reason for Action.

Personnel Action	s				
Ø					
Find by * A Person * Collective searc * Search Term	Personnel No. Personnel No.	s.Assgn			
• 🛗 Free search	Personnel Actions				
	Action Type	Personn	EE group	EE subg	
	*** APPOINTMENT ***				*
	Pre Boarding			8	+
	Initial Appointment				-
	Reappointment				
	Reappointment After Retirement				
	Reappointment w/o Break				
	Reinstatement				
	Renewal/Extension of Appt				
	Conversion of Annointment				

- 4. Click 🕑 to validate entries.
- 5. Click $\stackrel{\text{lee}}{\longrightarrow}$ to execute the action.



6. Click \Box to display the list of options for Reason for Action.

Personnel action		
Action Type	Initial Appointment	*
Reason for Action		

7. Click Initial Appointment to select.

8. Click \checkmark to confirm selection.



Reasons for Fixed-Term Appointments are restricted to reasons 01 to 11 inclusive. DO NOT select any reasons 30 to 60 for fixed-term appointments.

Initial Appointment

Used for initial appointments that are not the result of Interagency transfer, secondment or loans.

Interagency Transfer (1)

Used for Staff Members who are appointed as a result of an interagency transfer.

Interagency Rem Loan (i)

Used for SMs who are appointed as a result of an interagency reimbursable loan.

Interagency Non Reimb Loan

Used for SMs who are appointed as a result of an interagency non reimbursable loan.

Secondment (incoming) ⁽ⁱ⁾

Used for Staff Members who are initially appointed as a result of an interagency incoming secondment or as a result of a secondment from a government.

9. Enter the id number for the position the Staff Member will occupy in the Position text box.

Organizational assignment		
Position		Integration: default posi
Personnel area	US00	United States of America
Employee group	1	International Staff
Employee subgroup	PR	Professional & Above

- a. Click 🥙 to validate entry.
- 10. Once the position number has been entered and validated, the position title is displayed and the Organizational assignment area. The <u>Employee group</u> and <u>Employee subgroup</u> fields are automatically populated based on the Organizational Management information for the position.
 - Review the values displayed for each field and make the necessary corrections.
 - If the Position number is correct, but the title is incorrect, contact your OM Administrator to resolve.

If the position remains 9999999, or does not have funding, the Staff Member will not be paid.

- a. Click 🧭 to validate entry.
- 11. Click \blacksquare to save the record
- 12. Note the header information has been dynamically updated after saving <u>infotype 0000</u> (Actions) and that the Staff Member's Employee Status has changed to Active.
 - Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the Staff Member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Requestor Job Aid.
 - Update any missing fields, as applicable, based on the Staff Member's **original verified** documentation.
 - For example, if the Staff Member is married and related but does not provide the marriage certificate until they come on board, you would update the Since field here.

Special Note Regarding Staff Members Subject to Taxation on their UN Emoluments: It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/ Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

- a. Click 🧭 to validate entry
- 13. Click \square to save the record.
- 14. The values reflected in <u>infotype 0001</u> (Organizational Assignment) for Enterprise Structure and Personnel Structure are derived from the position number information

established in infotype 0000.

Enterprise Structure

Verify the Subarea (Duty Station) in the Enterprise Structure section.

If incorrect, enter, or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

Personnel Structure

Verify the Payroll area (Payr.area). If the Payr.area is

* 99, enter the correct Payr.area. 99 may appear during reappointments of separated Staff Members if their Payr.area was set to 99 (Not Payroll Relevant) as part of the separation process. This must be corrected or the Staff Member will not be paid.

Any inaccuracies related to position must be corrected since entitlements may be impacted. (i.e. if personnel area/sub area are wrong, the post adjustment, if applicable, would pick up the wrong value. If payr.area is not corrected from 99, the Staff Member will not be paid.)

If the information is correct proceed with validation and saving.

a. Click Solution to validate values. You may have to click Solution multiple times to acknowledge messages displayed at the bottom of the screen.

- 15. Click \blacksquare to save the record.
- 16. For a Fixed-Term appointment you should complete ()
 - Seniority in Grade is the length of time the Staff Member has been at the same grade level. For initial appointments, this matches the EOD date.
 - You will need to manually calculate the retirement date [ddmmyyyy] for the Staff Member as per the current rules in force. (the date Staff Member will turn 65 if appointed after

01.01.2014)

- U1 EOD UN Common System [ddmmyyyy] ⁽ⁱ⁾
- U2 EOD UN Secretariat [ddmmyyyy] ()
- U4 Seniority in Grade [ddmmyyyy]
- U5 Retirement Date [ddmmyyyy]
- You must also enter a Declaration Date. Click to display the list of options and locate the Declaration Date value.

🖙 Date type (1) 12 Entries found						
_/	Restrictions					
	Σ					
	◙▷₥╠☆ፇ읕レェ					
DT	Date type					
U1	EOD UN Common System					
U2	EOD UN Secretariat					
U4	Seniority in Grade					
U5	Retirement Date					
U6	OVR EOD D/S					
U7	OVR Mobility Ef Date					
U8	Pension Particip Dt					
U9	OVR D/S Arvl-Rental					
UA	Declaration Date					
UB	Waiver Signed Date					
UD	ASHI - UNCS EOD					
UL	AL Accrual					

- 17. Click UA Declaration Date to select.
- 18. Click \checkmark to confirm the selection.
- 19. Enter the Declaration date [ddmmyyyy] in the Date text box.
 - a. Click 🕑 to confirm the selection.
- 20. Click \square to save the record.
- 21. Select the appropriate option from the dropdown list for Contract Type. Click Fixed

Term.

Contract Type	Fixed Term	-	Valid Until
	Fixed Term	٠	
Additional fields	Consultant	*	
Rules Series ID	Ind. Contractor		-
Status ID	UN Volunteer UN Police Officer		-
Recruitment. Indicator	Military Observer		-
Contract Status	Staff Officer	111	-
Contract Term	Non-staff Others Govt Provided Person		-
Contractual Payment State			
	Non Active Status	*	
	Not Applicable	Ŧ	



For purposes on onboarding staff, HR partners should select only from the first three options:

- Continuing: for continuing appointments
- Fixed-term: for fixed-term appointments
- Temporary: for Temporary appointments
- 22. Enter the expiration date [ddmmyyyy] of the appointment in the Valid Until text box.
- 23. Select the appropriate option as the method of recruitment from the Status ID <u>Status ID</u> dropdown menu.

Additional fields		
Rules Series ID	_	
Status ID	_	
Recruitment. Indicator	CRB recruitment	-
Contract Status	GS & Rel Recruit Exam	-
Contract Term	NCRE [prior 2011]	•
Contractual Payment Sta	G to P [prior 2011] G to N [prior 2011] Prof Lang Comp Exam	•
Remarks	Top Echelon Appointment GS Competitive Exam Prof Lang Coord Exam Assoc Tran. Support Exam Lang Teacher Exam	
	Lang Teacher Exam	

If the Staff Member has been provisionally appointed pending the completion of reference checks this option should be left blank.

24. The Recruitment Indicator is used to record if the Staff Member is entitled to being travelled by the Organization (for those recruited outside the commuting distance to the duty station). This field is for record purposes only. Click *Yes*.

Additional fields			
Rules Series ID	N.	•	
Status ID	CRB recruit	ment 🔻	- 92
Recruitment. Indicat	tor	No	-
Contract Status		No	
Contract Term		Yes	
Contractual Payment	t Status Order	Prorated	*

25. Select the appropriate option for <u>Contract Status</u> from the dropdown menu. Click *Geographical*.

Additional fields			
Rules Series ID		*	
Status ID	CRB recruit	CRB recruitment	
Recruitment. Indicato	or	Yes	*
Contract Status		5	-
Contract Term		Expert	
Contractual Payment	Status Order	Geographical	
Contract Term Contractual Payment Status Order Remarks		Language Limited Other Retiree Retiree - language	

- 26. The comments entered in the remarks field of <u>infotype 0016</u> (Contract Elements) will appear in the Special Conditions section of the LOA. Use only if you need to add remarks to the LOA.
 - a. Click 🕑 to validate entries.
- 27. Click 🗹 to acknowledge the message

⊡ Display Messages		
Ty Message Text		Det.
Start date after initial entry of the start date after initial entry of the start date after initial entry of the start date after a start date a st	late (03.08.2015)	g
		17,000,000,000

- 28. Click 🔮 to validate values.
- 29. Click \square to save the record.
- 30. Click to select the <u>NPO Assignment Type</u> All initial appointments are **permanent movements**.

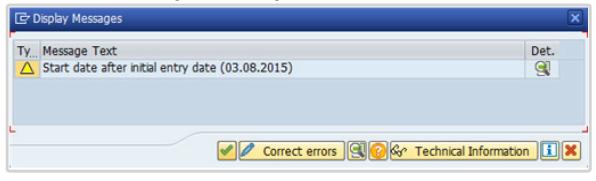
🔄 Infotype 🗄	dit <u>G</u> oto Extr <u>a</u> s	System I	<u>H</u> elp
	▼ « [i 🖶 🕅 🖄 i 🎗 🎝 🗘 🎝 🎝 💭 🔽 i 🥝 🖳
Create NP	0 Assignment	(3344)	
la 🖓 🖓			



32. If the Staff Member is entitled to travel upon initial appointment, select Yes and record the appropriate <u>shipment options</u> selected by the Staff Member. This information is for record purposes only. No payments are processed through this infotype. You must process the Off-Cycle payments through the Off-cycle form in the Portal or the shipment through Travel. See the Movement Related Entitlements job aid for details.

Movement / Travel Rec	uirements	
Assignment requires ch	ange in Duty Station: Yes 	○ No
Shipment option	Unaccompanied Shipment (Assign/C	
Shipment details	RLG : \$15,000 @ Dependent rate	

- a. Click 🧭 to validate selection.
- 33. Click 🗹 to acknowledge the message



34. Click 🥙 to validate values.

Infotype Edit	<u>G</u> oto Extr <u>a</u> s S <u>v</u> stem <u>H</u> elp
	💽 🗸 🖶 🧟 🕲 🖨 🕅 🖄 🗳 🗗 🖓 🎝 🖬 🖓 🖳
Create NPO	ssignment (3344)
🔊 🕼 🧟	

- 35. Click 🔙 to save the record.
- 36. Count for Mobility should only be checked for a Staff Member hired on posts subject to international recruitment with an initial appointment, reappointment or assignment for one year or longer. Therefore, it should always be checked for a fixed-term initial appointment or reappointment as the minimum length for these appointments is 1 year. Click to select.

Non-removal entitlement: DO NOT CHECK

a. Click validate selections. You may have to click validate selections acknowledge messages at the bottom of the screen.



- 37. Click \blacksquare to save the record.
- 38. The HR Partner should minimally enter the addresses for Mailing Address and Permanent Address, and the Emergency Contact information. -style">

🔄 Subtypes for infotype "Addresses" (1)				
	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)			

- a. Click 🗹 to confirm selection.
- 39. Enter the details of the Staff Member's mailing address.
 - a. Click 🕑 to validate selections,
- 40. Click \blacksquare to save the record.
- 41. Follow the steps above to enter all the available addresses. When done click 🖾 to proceed to next infotype.
- 42. Select the work schedule for this particular Staff Member. Most Staff Members will have a **normal** work schedule for the duty stations but there are exceptions. Be sure to pick the right one for your case.

Please be sure to select a valid work schedule and that the Time Mgmt status is always 9-Time evaluation of planned times. If the option shown is 0 - no time evaluation, time evaluation will NOT run for this Staff Member. Once these two options are correctly set and validated, you MUST save the record. Do Not skip this infotype as time evaluation will not run properly.



a. Click 🗹 to validate selections, You may have to click 🗹 more than once to acknowledge messages at the bottom of the screen.

- 43. Click ⊟ to save the record.
- 44. You **MUST** enter the Pay scale Group and Level information for this infotype then validate and save or Payroll will **NOT** run for this Staff Member.

Once you have validated the information, the Wage types and amounts should populate. Review to ensure the information reflects the correct emoluments for the Staff Member.

Notice the Next Increase (new Within Grade Increment) is not accurately reflected. The correct date will automatically populate in this field when the infotype is saved. DO NOT enter a date in the Next Increase field provided as this

field is used for override purposes only. Review <u>infotype 0008</u> (Basic Pay) using PA20 after you approve this PA, to confirm the correct date has been populated.

a. Click Solution to validate entries. You may have to click Solution more than once to acknowledge messages at the bottom of the screen.

🖙 Infotype	Edit	<u>G</u> oto	Wage types	Extras	System	Help
		•] « 日 🛛	8 8		111111
Create E	Basic I	Pay (O	008)			

- 45. Click \square to save the record.
- 46. In this infotype you indicate if the Staff Member is entitled to Pension participation. The following menu options are available for the

[_. Fund Details Status [_. Schema | | **Contributing**: If the Staff Member has an initial appointment of more than 6 months.]*Standard Schema*: This indicates the Staff Member is

part of standard Pension Participation. || **Non-Contributing**: If the Staff Member has an initial appointment of less than 6 months.

Validating: Should not be used for Initial Appointment or Reappointment. | **SLWOP Schema**: This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.|

PF Number			Reason	*
Fund Details				
Status	Contributing	•	Participation date	01.09.2015
Schema	Standard Schema	-		

In this example, the system automatically set the Staff Member's status to Contributing because of their Fixed-Term appointment. Also, note that the Participation date is automatically generated by the system and cannot be changed.

a. Click 🥙 to validate the values.



- 47. Click \blacksquare to save the record.
- 48. You should record all passports and visas held by the Staff Member. Click Passport.



- 49. Click 🗹 to confirm selection,
- 50. Complete the field for Passport1
 - ID number [xxxxxxx]
 - Date of issue [ddmmyyyy]
 - Valid to [ddmmyyyy]
 - Place of issue [xxxxxx]
 - Country of issue [xxxxxx]

a. Click 🔮 to confirm entries.

- 51. Click \blacksquare to save the record.
- 52. Follow the steps above to enter all available <u>Personal IDs</u>. At a minimum, enter all passports and visas presented by the Staff Member.

Also enter the following, as applicable.

- G4 visa
- Non U.S. Official d/s Visa
- Drivers License
- Birth Certificate
- Marriage Certificate
- Tax Identification Number



• Special Note Regarding Staff Members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For Staff Members who have bank account in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding Staff Members Subject to Taxation of UN Emoluments:

For Staff Members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all Staff Members, but especially for Staff Members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the Staff Member's official UN country of nationality. For those Staff Members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British Staff Member with dual citizenship in the US must have Othr/Birth set to of the USA.

• For Staff Members who are nationals of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For Staff Members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click is to proceed to the next infotype.
- 53. Minimally, you should record an email address for the Staff Member. Use the Staff Member's personal email address, if their UN Email address is not yet available. Click *UN Email Address*.

If available, enter also:

- UN Office Telephone
- Cell Phone

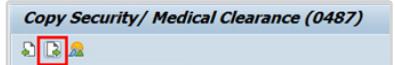
	◙╓╠╞╗╘╻
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

- 54. Click 🗹 to confirm selection.
- 55. Enter the Staff Member's UN email address in the ID/number text box.
 - a. Click 🔮 to validate entry,
- 56. Click \blacksquare to save the record.
- 57. Follow the steps above to enter all available forms of Communication. When complete, Click 🖾 to proceed to the next infotype.
- 58. If you need to record a <u>Medical or Security Clearance</u> because the Clearance Type, Clearance Category, Application Status or Reference Number fields are blank, refer to the procedures in the <u>Offer Management Procedures</u> chapter of this manual and remember to save this record.

If these fields are populated then a clearance record already exists and should correspond with the record you verified prior to executing this PA. In this case, you must skip the existing record as saving it during the execution of the PA will create a new, duplicate record in <u>infotype 0487</u> (Security/Medical Clearance) with a new incorrect

effective date, wich is the effective date of this PA you are executing.

a. Click 🕒 to continue with the PA



- 59. For fixed-term appointments, you should minimally record the Staff Member's Place of Recruitment.
 - <u>NPO Entitlement Country and City Menu Key</u>

In the case of International Staff Members, you must record their Place of Home Leave or exceptionally, the Place of Home Country, as shown below. The date on which it is established is one of the elements used to calculate the Staff Member's repatriation entitlement upon separation.

a. Click HOLV label

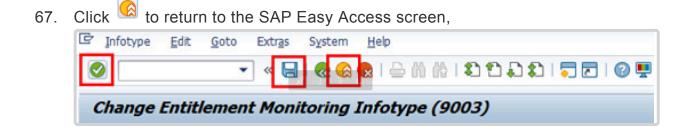
Restrictions				
	V			
	◪ѨѨ҉ҡ҅ฅЀӏ			
STyp	Name			
HOLV	Place of Home Leave			
PFV	Place of family visit			
PHC	Place of Home Country			
POR	Place of residence - Temp Lang			
PPD	Place of Professional domicile-Temp Lang			
PPR	Place of Permanent Residence			
RECR	Place of Recruitment			
ROCD	Residence outside commuting distance			

- 60. Click 🗹 to confirm selection.
- 61. Enter the Country and City, and Airport Code for the place of Home Leave. Click on <u>World Airport Codes</u> to identify the airport code.

The place of home leave must be established for all international staff, even for those

serving in the same country as their nationality.

- a. Click 🕑 to validate entry,
- 62. Click \blacksquare to save the record.
- 63. Follow the steps above to enter all available NPO Entitlement Countries / Cities. When completed, click is to proceed to the next infotype.
- 64. The infotype 9003 (Entitlement Monitoring), in this PA records completion of the action. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically display the date you completed the action, as indicated in the screen below. Click Yes list item.
- 65. Click 🥙 to validate entry,
- 66. Click 🔄 to save the record. An email notification will be sent to the Staff Member and the PA will appear in ESS.



You should execute a T-code PA20 to review the PA and <u>Infotypes</u> you changed in this transaction. Each personnel action completed should be documented by adding a note (T-code PA30) in <u>infotype 0000</u> of the saved record.



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Infotypes Used

Infotypes found in Special Movement PAs

Infotype #	Description	More Info.
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0041	Date Specifications	()
0016	Contract Elements	
3344	NPO Assignment	
0960	NPO Mobility and Hardship Allowance	
0006	Addresses	
0007	Planned Working Time	
8000	Basic Pay	
0961	NPO Pension Funds	()
0185	Personal IDs	(])
0105	Communications	
0487	Security/Medical Clearance	
3244	NPO Entitlement Country and City	()
9003	Entitlement Monitoring	

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Click on Infotypes below for a complete list.

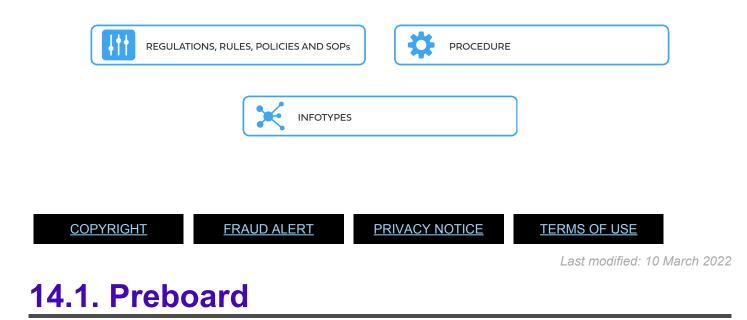




Last modified: 17 March 2022

14. Preboard

Before proceeding you should become familiar with the following information:



The **Preboard PA** should be manually executed when:

- the inspira interface is not available;
- a Staff Member is being onboarded and requires travel; or
- a Staff Member is separated in one duty station, and is being reappointed in a different duty station to which the staff member will be travelled. The <u>Preboard PA</u> is used in this situation to change the staff member's organizational unit, ensuring that the proper entity is charged for the travel and that the travel request is routed to the **HR Partner** in the correct entity.



The <u>Preboard PA</u> should only be executed after confirmation that medical clearance has been completed.



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14.2. Preboard PA

The procedure for preboarding a staff member for a temporary international appointment is exactly the same as that for a fixed-term appointment.



Since dependants are not entitled to be travelled at the Organization's expense for temporary appointments, the preboard for household members should never be executed in cases of temporary appointments.



The Preboard PA should only be executed after confirmation that medical clearance has been completed.

As best practice, the following infotypes should be reviewed:

1. Start the transaction using the menu path or transaction code, e.g.PA40.



- 2. Click 🗹 button
- 3. Enter the staff member's Index Number in the Personnel No. text box. [xxxxxxxx]
- 4. Enter the date of the Preboard PA in the Start text box. [dd/mm/yyyy]



This date must be:

- at least one day after the creation date of the Index Number, and
- prior to or equal to the date of processing the travel request, and
- at least one day before the EOD date.

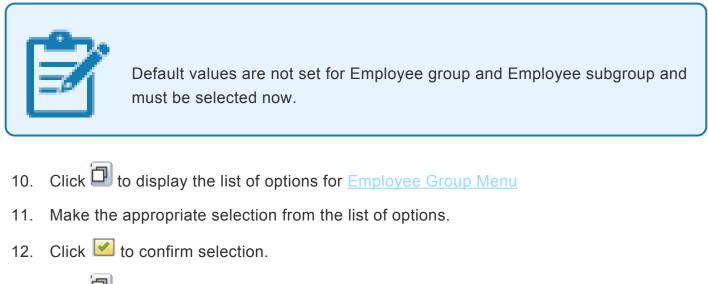
a. Click 🥙 to validate entries.

- 5. Click to select the *Preboard* personnel action.
- 6. Click ^(A) to execute the action.
- 7. Click 🗇 to display the list of options for <u>Preboard Reason for Action Menu Key</u>
- 8. Click label Manual No Onb. Form
- 9. Click 🗹 to confirm selection.

Please note the interface and the ESS onboarding form are currently unavailable. All HR Partners should therefore ALWAYS select Manual – No Onb. Form when processing all Preboard PAs until further notice.
 Additionally, please note any reasons for action with asterisks (***) should NEVER be selected. They simply represent a header in the reason for action list.



Under the Organizational Assignment section, the Position defaults to 99999999 and should not be changed at this time. Position 99999999 is a placeholder and will be replaced during execution of the onboarding PA. The value for Personnel area is determined during execution of the Request for Index Number PA. The Personnel area setting here will determine the Personnel Subarea (Duty Station) options you can choose from on IT0001 later in this PA.



- 13. Click 🗇 to display the list of options for Employee Subgroup Menu
- 14. Make the appropriate selection from the list of options.
- 15. Click \checkmark to confirm selection.
- 16. Click validate entries, you may have to click value more than once to acknowledge messages at the bottom of the screen.

C Infotype	<u>E</u> dit <u>G</u> oto Extr <u>a</u> s	S <u>v</u> stem <u>H</u> elp
0	• 4 🖯	🗟 😪 । 🗁 ଲି ଲି । ସି ସି କି ସି ମି 🗐 🔽 । 🞯 🖳
Copy Act	ons (0000)	
🔉 🖪 🧟	Execute info group	Change info group

- 17. Click \blacksquare to save the record.
- 18. Infotype 0002 (Personal Data) is populated with the information from the current Personal Data record. Review this information. It should match the information from the legal document(s) (passport, birth certificate, etc) submitted. In the event that any changes are required, you can only make the changes if the staff member provides new legal documentation supporting the change (new passport, marriage certificate, etc). Follow the procedures for entering information as documented in the GID Requestor Job

Aid.



Special Note Regarding staff members Subject to taxation on their UN Emoluments:

It is critically important to accurately capture the UN Nationality for all staff members, but especially for staff members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the staff member's official UN country of nationality. For those staff members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British staff member with dual citizenship in the US must have Othr/Birth set to of the USA.

- a. Click 🕑 to validate entries.
- 19. Click \blacksquare to save the record.
- 20. Verify the Subarea (Duty Station) in the Enterprise Structure section. If incorrect, enter or select the correct option from the text box dropdown. The Subarea field is required for this infotype.

CoCode	1000 United Nations	
Pers.area	US00 United States of Americ	ca Subarea US00 New York
Cost Ctr		Bus. Area
Personnel Stru	icture	
EE group	1 International Staff	Payr.area 99 🗇 Not Payroll Relevant
EE subgroup	PR Professional & Above	Pos. Type 🔻
	Plan	
Organizational		
Organizational Percentage	100.00 🔁 Assignme	ent
	100.00 Resignme 99999999 Integration: defau	
Percentage		

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The Payroll area should NEVER be changed during execution of the Preboard PA. The Payroll area will be correctly established during execution of the appropriate onboarding PA.

- 21. Click Assignment to add the staff member's Organizational Unit, used to route travel requests to the appropriate HR Partners.
- 22. Click 🧭 to validate entries.
- 23. Click \blacksquare to save the record.
- 24. Next, <u>infotype 006</u> (Addresses) is required for the creation of the staff member's Business Partner (BP) number, without which the staff member cannot be traveled.
 - a. Click Mailing Address.
- 25. Click \checkmark to confirm selection.
- 26. Enter the staff member's mailing address.
 - a. Click 🧭 to validate entries,
- 27. Click \blacksquare to save the record.
- 28. Enter as many address types as possible. Minimally, the Mailing Address must be entered.
 - a. When 🖾 done, click to continue.
- 29. It is imperative to add the **permanent resident information** if the staff member has a permanent residence status in another country. Additionally, the **visa and the passport information** should always be entered.

Please note that the TAX ID Number is a requirement if the staff member is entitled to tax reimbursement by the Organization or if the staff member has a bank account in Argentina, Brazil, Venezuela, Colombia, or Chile.

Remember, the original document should be verified during the staff member's induction.

a. Make the appropriate selection from the list of options.

		▼				
 Image: A start of the start of						
IC	Description					
01	G4 Visa		*			
07	G5 Visa		Ξ.			
10	Perm Resident					
13	B1 Visa					
16	B2 Visa					
19	U.S. Work Permit					
20	Non U.S Official d/s Visa					
22	DtyStation Residency Card		-			
25	Carte de Legitimation					
28	Passport1					
31	Passport2					
34	Drivers Licence					
36	LP1					
37	LP2		-			
38	LP3					
39	LP4					
43	Birth Certificate					
46	Marriage Certificate					
40	HN Grounde Daee					

- 30. Click 🗹 to confirm selection.
- 31. Enter the:
 - ID number [xxxxxxx]
 - Date of issue [dd/mm/yyyy]
 - Valid to date [dd/mm/yyyy]
 - Place of issue [xxxxxxx]
 - Country of issue [xxx]

Personal IDs	
ID type	▼
ID number	
Date of issue	
Valid to	
Place of issue	
Country of issue	

a. Click 🕑 to validate entries.

- 32. Click \square to save the record.
- 33. Follow the steps above to enter all available <u>Personal IDs</u>, including the following, as applicable (see Appendix ID Types for descriptions)
 - G4 visa
 - Perm Resident
 - Non U.S. Official d/s Visa
 - Carte de Legitimation
 - Drivers License
 - Birth Certificate
 - Marriage Certificate
 - Tax Identification Number

<u></u>	
	◩◧;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;
IC	De Close pn
01	
07	G5 Visa
10	Perm Resident
13	B1 Visa
16	B2 Visa
19	U.S. Work Permit
20	Non U.S Official d/s Visa
22	DtyStation Residency Card
25	Carte de Legitimation
28	Passport1
31	Passport2
34	Drivers Licence
36	LP1
37	LP2
38	LP3
39	LP4
42	Rirth Cartificata

• Special Note Regarding staff members with bank accounts in Argentina, Brazil, Venezuela, Colombia, or Chile:

For staff members who have bank accounts in one or more of these countries, TAX Identification Number is a requirement.

• Special Note Regarding staff members Subject to Taxation of UN Emoluments:

For staff members who are required to pay tax on UN income, the following MUST be recorded:

It is critically important to accurately capture the UN Nationality for all staff members, but especially for staff members whose country taxes UN income, e.g. USA. Make sure the UN National field is set to the staff member's official UN country of nationality. For those staff members who have dual citizenship in a country which taxes UN income, make sure the Othr/Birth field is set to that country, e.g. a British staff member with dual citizenship in the US must have Othr/Birth set to **of the USA**.

• For staff members who are nationals of a country that requires taxation of UN

emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999

• For staff members who are Permanent Residents of a country that requires taxation of UN emoluments, e.g. USA

Tax Identification Number record, e.g., USA format xxx-xx-xxxx, with To date, and Valid To date = 31.12.9999 Permanent Resident record, with Country of issue = country that requires taxation of UN emoluments, e.g., USA, and with To date, and Valid To date = 31.12.9999

- a. When completed, click 🖾 to proceed to the next infotype.
- 34. The <u>infotype 0105</u> (Communications) allows you to enter contact information for the staff member. Minimally, the following contact information should be added:
 - Personal Email Address
 - At least one phone number

	◪◍╠₅▨읕◗
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

35. Click **I** to confirm selection.

36. Enter the staff member's Personal email address in the ID/number text box.

Communication	
Туре	MAIL Personal Email Address
ID/number	tonystark@comic.com

- a. Click 🕑 to validate entry,
- 37. Click \square to save the record.
- 38. When complete, Click \square to proceed to the next infotype.
- 39. All security and medical clearances should have taken place and recorded in Umoja prior to executing the Preboard PA.

The most recent clearance records will be shown here on infotype 0487.

a. Click 🗳 to continue with the PA



40. The <u>infotype 9003</u> (Entitlement Monitoring), records completion of the PA. Click Yes to select the Action Completed Flag documenting that the action has been completed. When you choose Yes, the Action Completed On field will automatically populate the date when you complete the action as indicated in the screen below. Click Yes list item.

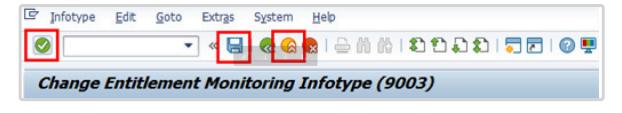
Personnel Action Details	
Subtype Action / Reason Effective Date Action	0302 Personnel action monitoring 0335 03 Pre Boarding
Reason Initiated / Last Update Date Initiated / Last Update By	35 Manual - No Onb. Form
Action Completion Status	
Action Completed On Action Completed Flag	Yes 🔻

41. Click 🔮 to validate entry,

42. Click \blacksquare to save the record.



43. Click 🧟 to return to the SAP Easy Access screen,







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Preboard Reason for Action Menu Key

Hover over each option for more information.

• *New Hire – inspira

Automatically set as the *Reason for Action* when the *inspira* interface creates the Preboard PA for initial appointments. **NOT TO BE USED** for manual creation of the Preboard PA.

• *Reappointment – inspira

Automatically set as the Reason for Action when the *inspira* interface creates the Preboard PA for reappointments of former staff members, who do not have a pre-existing Preboard PA. NOT TO BE USED for manual creation of the Preboard PA.

• Manual – Onb. Form

Used when there is no *inspira* interface data and information must be entered manually to update the ESS Onboarding form. (Since the onboarding form is not in use at this time, DO NOT USE for manual Preboard PA.)

• Manual – No Onb. Form

Used when there is no *inspira* interface data and information must be entered manually prior to processing a PA40 Initial Appointment or Reappointment PA in ECC.)



Please note the *inspira* interface and the ESS onboarding form are currently unavailable. All HR Partners should therefore ALWAYS select Manual – No Onb. Form when processing all Preboard PAs until further notice. Additionally, please note any reasons for action with asterisks (***) should NEVER be selected. They simply represent a header in the reason for action list.

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Infotypes Used

Infotypes found in a Preboard PA

Infotype #	Description	More Info.
0000	Actions	
0002	Personal Data	
0001	Organizational Assignment	
0006	Address	
0185	Personal IDs	
0105	Create Communications	

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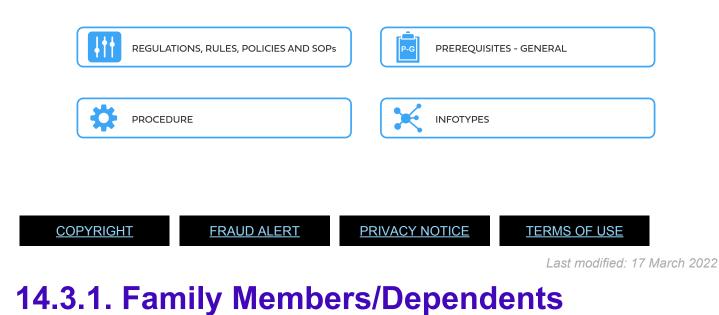
14.3. Add Household Members for Preboard Purposes

Dependants should only be added to a staff member's data following the creation of the

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Preboard PA for the staff member for travel purposes,

Before proceeding you should become familiar with the following information:



The staff rules and regulations provide the policies in the administration of human resources. The major policy documents relevant for this manual are listed below: The official documents are easily accessible within the <u>UN Policy Portal</u>.

"Staff Rules and Staff Regulations of the United Nations – <u>ST/SGB/2018/1</u> Staff Regulation 3.4

Staff Rule 3.6: Dependency allowance Definitions Staff Rule 3.17: Retroactivity of payments

Personal status for purposes of United Nations entitlements – ST/SGB/2004/13/Rev.1

Dependency Status and dependency benefits – ST/AI/2011/5

- Section 2 Dependent Spouse
- Section 3 Dependent child or children
- Section 4 Special provisions
- Section 5 Secondary dependants

<u>Visa status of non-United States staff members serving in the United States, members of their</u> <u>household and their household employees, and staff members seeking or holding permanent</u> <u>resident status in the United States – ST/AI/2000/19</u>

Section 1 – Eligibility for international organization G-4 visa status

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14.3.2. Add Household members

This procedure is used when the Inspira interface that creates the preboard PA is not operational. In this situation, the HR Partner must manually create the household members to allow them to travel with the staff member upon initial or reappointment. Without this action, no travel can be requested for the household members.

- 1. Start the transaction using the menu path or transaction code, e.g.PA30.
- 2. Click after typing PA30 in the Command text box.
- 3. Enter the Staff Member's Index Number in the Personnel No. text box. [xxxxxxxx]
 - Click Strain to validate entry.
- 4. Use <u>infotype 0021</u> (Family Members/Dependatns) by typing *0021* in the <u>Infotype</u> text box.
 - a. Click 🥙 to validate entry
- 5. Enter the date of the Preboard PA in the From text box. [dd/mm/yyyy]
 - a. Click 🗅 to create a new record.
- 6. Make the appropriate selection from the list of options.
 - a. Click 🗹 to confirm selection.
- 7. Enter as much information as possible, minimally include the fields shown here.
 - Last Name
 - First Name
 - Gender
 - Date of Birth

- UN National
- Birthplace
- City of birth
- Marital Status
- Since Enter Marriage date for spouse, Date of birth for a child

The spelling of names must match exactly the spelling used in the passport. See the section on Standards for entering staff member names in the GID job aid.

a. Click 🔮 to validate entry.

Do not click on any of the checkboxes or enter a date in the "In receipt of allowance since" field. The only additional fields required are Marital Status and Since for any type of household member.

- 8. Click 🔙 to save the record. 🕕
 - a. Repeat the steps in this procedure to add as many household members as will be travelled by the Organization upon this appointment.
- 9. Click lo return to the SAP Easy Access Screen.





Infotypes found in Add Household Members for Preboard Purposes

Infoty	pe #	Description
-	•	-

0021	Family Members/Dependents			
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				Last modified: 18 August 2021

15. Resources

This library provides additional resources to assist you with your functions.



- Prerequisites Special
- Prerequisites HHM

Last modified: 30 November 2021

15.1.1. Prerequisites General

The HR Partner must go through the following documentation checklist before processing any onboarding Personnel Action.(refer to the "Global Onboarding Document Checklist")

- Evaluation of Prior Periods of United Nations Employment
- Personnel Number
- <u>Offer Management Document</u>
- <u>National Passport</u>
- Marital Status Documents
- <u>Birth Certificates</u>
- <u>Visa</u>
- Selection Documents
- Induction Documents



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Last modified: 1 November 2021

Evaluation of Prior Employment with the United Nations

The employment history of the reappointed staff member should be evaluated to ensure the correct Personnel Action is executed and to ensure compliance with any break-in-service requirements and adjustments to entitlements (e.g adjustment to Settling-in Grant., 31-day break for Fixed Term Appointments, etc.).

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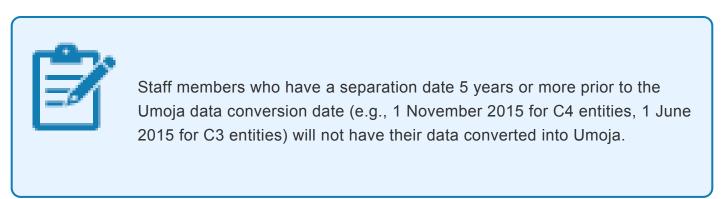
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Personnel number

All staff members have a unique number. Generating an Index Number for new staff members is part of the *inspira* Offer Management process and should be requested via your Global Index Requester. (refer to the "GID Job Aid" for more information).

A reappointed former staff member should have an Index Number associated with their previous appointment(s). This unique number will be used during the approval process in both the portal and ECC to identify the staff member and execute required actions on their behalf.





If the Index Number existed previously in IMIS but the staff member's data has not been converted to Umoja, the HR Partner will have to open a ticket with the Operational Support Desk (OSD) requesting a data conversion or a confirmation of the Index Number. Once reviewed by OSD, the Index Number will be made available in Umoja as the staff member's Index Number (see the procedures in the GID job aid).



Dependants will no longer have an individual Index Number. In Umoja, the dependants will have a unique identification number that is a derivative of the staff member's Index Number (e.g. Staff member with Index Number 12345678 has two children with the following identification number: 12345678-0201 and 12345678-0202. Please note different extensions exist for different dependant types.



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Offer Management Documents

When a candidate is selected for a job opening, the Hiring Manager will submit a recommendation for recruitment to the HR Partner, who will send an offer to the candidate through the offer management module in *inspira*. The Offer Management module in *inspira* will

produce several key documents that should be referenced during the approval process of the Initial or Reappointment PA. Other documents will be provided by the staff member in the course of onboarding. These documents include:

- Offer of Appointment and Acceptance
- Personal History Profile (PHP)/Personal History (P.11 form)
- Designation (if applicable)
- Verification of Highest Degree and Current/Last Employer)
- Reference Check
- Medical Clearance

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Medical Clearance

Regarding the following required documentation, a thorough review of the staff member's Official Status File should be conducted prior to their arrival. If required documentation has been verified from original and is on file, there is no need to request a second time.

Before proceeding you should become familiar with the following information in "Medical Clearances – <u>ST/AI/2018/4</u>

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National Passport(s):

The **HR Partner** shall verify the original national passport of the staff member as well as the national passports of eligible dependants, if available. All national passports must be current,

valid passports from a recognised country. Copies of the verified original(s) must be maintained in the OSF.

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Marital Status Documents

Originals of the marriage certificates or separation/divorce documents must be verified and include the names of the staff member and spouse/ex-spouse, the city and country in which the marriage, separation or divorce was concluded, and the date. Copies of the verified original(s) must be maintained in the OSF.

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Birth Certificates

The HR partner must verify the original birth certificates for the staff member and eligible dependants upon reporting to duty. Children cannot be established as dependants without the verification of an original birth certificate and may require additional documentation depending on the staff member's personal status (i.e. divorced Staff Members who are not the custodial parent must provide proof of support satisfactory to the Organization). Copies of the verified original must be maintained in the OSF.

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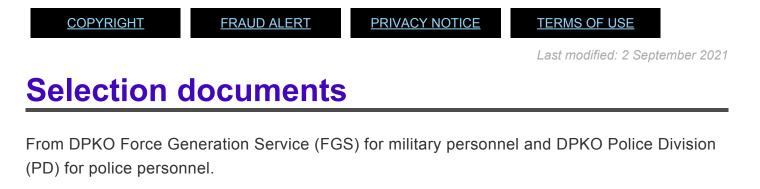
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Visa

The Organization should make visa arrangements for the selected candidate at the appropriate time prior to, or upon arrival at the duty station as required by the host country. If the candidate

claims to have a valid visa, the HR Partner must verify it to confirm that it is a current, original and valid visa issued by the proper authorities. Original visas should also be verified for all dependants, if applicable. Copies of the verified original(s) must be maintained in the OSF.



The following selection documents are required for:

- Military personnel Form DPKO Force Generation Service (FGS)
- Police personnel DPKO Police Division (PD)

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Induction Documents

The staff member should be provided with any hardcopy documents that must be completed in person (off-line documents) during their induction. The following information and documents are required to process the Staff Member's new appointment Personnel Action(s):

- Documents to be completed upon arrival
- <u>Check the position number and funding</u>
- <u>Civilian Pre-deployment training CPT-mission-only</u>

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Documents to be completed upon arrival:

- Designation, Change or Revocation of Beneficiary (P.2) must be printed and signed even if it is completed through ESS, otherwise it will not be valid
- Declaration Oath of Office (P.34)
- Authorization for Direct Deposit of Salary (F.48)
- Salary Distribution Request form for staff member in the field (F.248)
- United Nations Joint Staff Pension Fund (UNJSPF) -Designation of Recipient of a Residual Settlement under Article 38 of the Regulations (PENS.A/2)
- I-508 Form, Waiver of Rights, Privileges, Exemptions and Immunities (US Permanent Resident Only)

Best practice is to have the staff member (new or already on board), who has US Permanent Residency Status or acquired this status while on board, sign the waiver Form I508 as well as 3 HR Waiver memos only once. The original I508 form must be sent to the US Mission with a copy retained on file.

If the staff member separates and returns to the UN (no matter how long the period of break), as long as they still have the US Permanent Residency Status, no new waiver needs to be signed and the original waiver signature date on file will be maintained as a UB entry on IT0041.

Please note that recording a NEW Waiver Signature date every time a new onboarding PA is executed can result in blocking the creation and distribution of the Statement of Earnings document to the staff member.

 Waiver Memos (US Permanent Resident Only) – a series of 3 memos between the staff member and HR Partner, whereby the HR Partner grants the staff member permission to sign the Waiver and the Staff Member advises the date the Waiver has been signed <u>COPYRIGHT</u>

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Check the position number and funding

The position number will be required during the execution of the onboarding PA and unless there is funding on the position, the Staff Member will not be paid and and the HR Partner will be unable to process salary advance.



In cases of Mission appointments, prior to arrival in the mission, all new staff members must complete training aimed at supporting the Staff Member's transition to living and working in the field. This training lasts approximately one business week and takes place prior to arrival in the mission.

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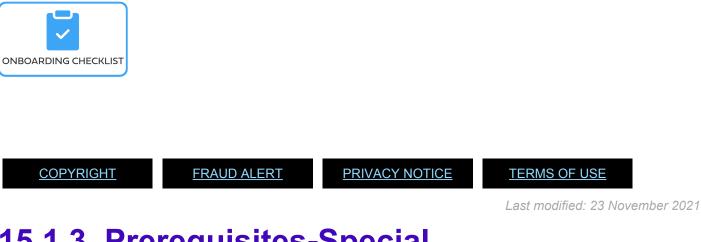
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15.1.2. Prerequisties Local

The HR Partner must go through the following documentation checklist before processing any onboarding Personnel Action (refer to the "Global Onboarding Document Checklist")

- Evaluation of Prior Periods of United Nations Employment
- Personnel Number
- <u>Offer Management Document</u>
- <u>National Passport</u>
- Marital Status Documents

- Birth Certificates
- Induction Documents



15.1.3. Prerequisites-Special

The HR Partner must go through the following documentation checklist before processing any onboarding Personnel Action. (refer to the "Global Onboarding Document Checklist")

Initial Appointment-Fixed Term International

These prerequisities apply to Initial Appointment-Fixed Term International.

Initial Fixed-Term Appointments from Examination Rosters

- Young Professionals Programme Roster
- Language Examinations Roster



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Young Professionals Programme Roster

The Young Professionals Programme (YPP) gives rise to very specific requirements that must be observed when processing the selection and offer management of a successful candidate for initial appointment with the Organization.

- Successful YPP candidates are maintained through a roster system after the successful completion of the YPP examination in a particular job family, which is managed by HRSD – special assessments section. In coordination with Hiring Managers, the Office of Human Resources Management will conduct a matching exercise to fill available P-1 and P-2 positions.
- 2. Successful candidates that have been selected for an available position will be provided an offer of appointment. This roster information must be included in the offer of appointment.
- External candidates will receive a fixed-term appointment for a period of two years, after which they will be granted a continuing appointment subject to satisfactory performance. This information must also be included in the offer of appointment.
- 4. Once the offer of appointment is accepted and clearances are received, the onboarding steps remain the same for YPP candidates as for any other initial fixed-term appointment. Coordination and participation in YPP related activities and events will be handled by the Office of Human Resources Management.

For successful YPP candidates who have more than one nationality, for United Nations purposes their nationality will be the nationality of the State under which they applied for the young professionals programme examination and they will not be able to change that nationality later.

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Language Examinations Roster

Similar to the Young Professionals Programme (YPP), recruitment of staff for language posts gives rise to very specific requirements that must be observed when processing the selection and offer of appointment to a successful candidate for initial appointment with the Organization.

- 1. Successful Language candidates are maintained through a roster system after the successful completion of a Language examination in a specialized language field, which is managed by SAS. When vacant positions are identified, hiring managers review the rosters and make a recommendation for selection to the HR partner. The selected candidate is then removed from the roster. The management of rosters is the responsibility of the Human Resources Services Division.
- 2. External candidates will receive a fixed-term appointment for a period of two years, after which they will be granted a continuing appointment subject to satisfactory performance. This information must be included in the offer of appointment. Internal candidates are placed on SPA for the two-year probationary period and a lien is maintained on their previous post. Upon satisfactory completion of the trial period, they will be promoted to the P3 category and converted to a continuing contract, if they did not have it already. Please refer to the Movements job aid if you are processing an SPA for an internal candidate.
- 3. Once the offer of appointment is accepted and clearances are received, all other onboarding steps remain the same for external Language candidates as for any initial fixed-term appointment.

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15.1.4. Prerequisites Household Members

Establishing family members (1) as household members and processing dependency benefits (1) requires considerable advance preparation on the part of the HR Partner, and staff member.

HR Partner's responsibility – Eligibility Review:

• Review the staff member's appointment status in Umoja (view contract data via PA20) to

ensure eligibility for the dependency allowance.

- Review and use policy and guidelines to verify eligibility for household members to be UN recognized family members.
- Review staff member's current family member profile in Umoja (view family member/ dependents via PA20), noting the existing family members and checking for the following circumstances:
 - No duplicate requests, i.e. adding the same child twice or adding an additional recognized spouse;
 - Claim of EITHER a dependent spouse OR a secondary dependant (Staff members cannot establish both as dependants. In cases of two staff married to each other, only the higher salaried staff member can claim dependency;
 - Staff members in General Services & related categories do not exceed the maximum of 6 dependent children, if applicable.
- Review staff member's official status file for official documents (as listed below) related to UN recognized family members. If the official documents are not on file, the staff member must be instructed by the HR Partner to take action to submit them as per the chart below. The HR Partner will not approve any dependency requests without seeing and verifying original supporting documentation, even if a non-verified copy has been attached to the ESS application.

The staff member's responsibility:

Staff members are required to provide official documentation that clearly shows the
relationship between the staff and the family member. The staff member may submit
documentation to create a household member and later on create a dependency request
or both may be submitted at the same time. Dependency is established when it is
determined that the family member is financially dependent on the staff member. To claim
dependency for these family members, the staff member must also provide some
additional documentation as per the chart in <u>Dependent Types</u>

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Dependant Types

Dependent type	Documentation to prepare for Umoja upload
Spouse	 For a dependent spouse who is employed, an annual wage statement or tax returnshowing that earnings are below the earnings limit For a new spouse or partner (whether dependent or not), marriage certificate, certificate of partnership and the birth certificate or passport of the spouse or part For a separation or divorce, the divorce decree or legal separation documents
Natural or legally adopted child	For a new child, birth certificate and adoption decree if applicable NOTE: Foster care and guardianship do not constitute legal adoption. For staff members who are not custodial parents, and do not have a court document specifying the amount of child support payments, a notarized affidavit from the custodial parent must be provided indicating the amount of support that the staff member provides for the child. The staff member must also provide proof of payments in the form of cancelled cheques, wire or bank transfers;
Stepchild	 For dependent children or step-children between the ages of 18 and 21, completed Certificate of Attendance form as proof of full-ti school attendance For a step child of any age, proof of residence with the staff member, as well as custody agreement If the staff member is in receipt of any governmental assistance (i.e. government grant) in respect of any of his/her dependent children, he/she must report the anr amount of the grant in the ESS application.
Disabled child	 The disability certification by UN Medical Services (This certification must be obta offline). School reports, if available and requested by MSD.(This certification must be obtained offline).
Secondary dependent	 Parent Proof of financial support provided during the year; the amount of support must be at least twice the amount of the allowance. Alternatively, proof of residence the secondary dependent lives with the staff member.

Sibling

Proof of financial support provided during the year the amount of support must at least twice the amount of the allowance. For a sibling between the ages of 18-21, proof of fulltime school attendance.



Non-Recognised spouse: The UN only recognises one spouse. When a staff member is legally married to more than one spouse, only one will be recorded as a spouse and the rest will be recorded in the system as a non-recognised spouse.

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Practice

Initial Temporary Appointments

- When Actually Employed
- When Actually Employed (WAE) Language Appointments
- Language Daily Appointments Interpreters
- Language Daily Appointments Translators
- Language Monthly Appointments Interpreters
- Language Monthly Appointments Translators

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When Actually Employed (WAE) Appointments

Use of "When Actually employed" (WAE) contracts, including those for language, allows the Organization to retain the services of individuals for work of an irregular or discontinuous nature, for assignments with uncertain duration or no clearly predefined schedule, and to ensure the availability at short notice of persons with special skills. Recruitment of staff members on WAE appointments gives rise to very specific restrictions that must be observed when processing the onboarding of a successful candidate for initial appointment with the Organization.

- WAE contracts should normally be issued for a period of six months at a time and should specify the maximum number of days that may be worked in the aforementioned period and should not exceed four and one-half months worked (two-thirds of overall contract period).
- 2. WAE appointments do not give rise to annual, special or sick leave and do not carry any entitlement to dependency or other benefits or allowances.
- 3. If applicable, representation allowance may be paid on a pro-rated basis.
- 4. WAE appointments give rise to daily subsistence allowance (DSA) where appropriate, in respect of days actually worked.
- 5. Staff members on WAE appointments are excluded from participation in the United Nations Joint Staff Pension Fund. This information must be included in the offer of appointment.
- 6. Salary and post adjustment for WAE appointments should be paid at the single rate.
- Retirees on WAE in receipt of pension benefits are subject to an earnings threshold of USD \$22,000 per calendar year.

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When Actually Employed (WAE) Language Appointments

Staff members who hold a WAE Language Appointment are subject to the restrictions related to Interpreter or Translator Daily Appointments indicated below in the Language Daily Appointment – Interpreters, and the Language Daily Appointments – Translators sections respectively.

In the case of retirees on WAE Language Appointments, they are subject to the earnings threshold for retired language service staff, which cannot be more than the equivalent of 125 days of monetary compensation, per calendar year. Additionally, they may not be re-employed for more than 125 days per calendar year.

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Language Daily Appointments – Interpreters

The following policy requirements are derived from the agreement between the United Nations/ Chief Executives Board of Coordination and the AIIC. The current agreement is valid from 1 July 2012 to 30 June 2017.

- 1. Appointments are for 59 days or less in a fixed period of time.
- 2. The staff member is paid a daily rate.
- 3. Letters of appointment should reflect (a) place of work; (b) dates of engagement; (c) applicable remuneration rates; (d) reference, where applicable, to a Caisse and/or accident and sickness insurance when the regulatory framework of the hiring Organization provides for this option, and the corresponding percentage to be deducted; and (e) whether the engagement involves travel and whether a daily subsistence allowance (DSA) is payable, and if so, in what form.
- 4. When a period of employment at daily rates is extended in such a way that the extension, together with the original duration of the contract, exceeds 60 days, the provisions governing monthly appointments shall apply from the 61st day.
- 5. Staff members on Language appointments are excluded from participation in the United

Nations Joint Staff Pension Fund. This information must be included in the Letter of appointment.

6. The earnings threshold for retired language service staff cannot be more than the equivalent of 125 days of monetary compensation, per calendar year. Additionally, they may not be re-employed for more than 125 days per calendar year.

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Language Daily Appointments – Translators

The following policy requirements are derived from the agreement between the United Nations/ Chief Executives Board of Coordination and the AITC. The current agreement is valid from 1 January 2013 to 30 June 2017.

- 1. Appointments are for 30 days or less in a fixed period of time.
- 2. The staff member is paid a daily rate.
- 3. Letters of appointment should reflect (a) place of work; (b) dates of engagement; (c) grade level and functional title; (d) applicable remuneration rates; (e) reference, where applicable, to a Caisse and/or accident and sickness insurance when the regulatory framework of the hiring Organization provides for this option, and the corresponding percentage to be deducted; and (f) whether the engagement involves travel and whether a daily subsistence allowance (DSA) is payable, and if so, in what form.
- 4. Staff members on Language appointments are excluded from participation in the United Nations Joint Staff Pension Fund. This information must be included in the Letter of appointment.

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Language Monthly Appointments –

Interpreters

The following policy requirements are derived from the agreement between the United Nations/ Chief Executives Board of Coordination and the AIIC. The current agreement is valid from 1 July 2012 to 20 June 2017.

- 1. Appointments are for 60 days or more in a fixed period of time.
- 2. The staff member is paid a monthly rate.
- 3. Letters of appointment should reflect (a) place of work; (b) dates of engagement; © grade level and functional title; (d) applicable remuneration rates; (e) reference, where applicable, to a Caisse and/or accident and sickness insurance when the regulatory framework of the hiring Organization provides for this option, and the corresponding percentage to be deducted; and (f) whether the engagement involves travel and whether a daily subsistence allowance (DSA) is payable, and if so, in what form.
- 4. Conference interpreters employed as staff members on monthly appointments shall accrue leave at the rate specified in the Staff Rules and Regulations for temporary appointments and upon separation shall be paid the unused leave days in accordance with the Staff Rules and Regulations.
- 5. Staff members on monthly temporary Language appointments are excluded from participation in the United Nations Joint Staff Pension Fund. This information must be included in the letter of appointment.

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Language Monthly Appointments – Translators

The following policy requirements are derived from the agreement between the United Nations/ Chief Executives Board of Coordination and the AITC. The current agreement is valid from 1 January 2013 to 30 June 2017.

1. Appointments are for 31 days or more in a fixed period of time.

- 2. The staff member is paid a monthly rate.
- 3. Letters of appointment should reflect (a) place of work; (b) dates of engagement; © applicable remuneration rates; (d) reference, where applicable, to a Caisse and/or accident and sickness insurance when the regulatory framework of the hiring Organization provides for this option, and the corresponding percentage to be deducted; and (e) whether the engagement involves travel and whether a daily subsistence allowance (DSA) is payable, and if so, in what form.
- 4. Conference interpreters employed as staff members on monthly appointments shall accrue leave at the rate specified in the Staff Rules and Regulations and upon separation shall be paid the unused leave days in accordance with the Staff Rules and Regulations.
- 5. Staff members on monthly temporary Language appointments are excluded from participation in the United Nations Joint Staff Pension Fund. This information must be included in the Letter of appointment.

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15.2. Process

Umoja onboarding refers to the period of time from when a candidate has accepted the offer for a temporary or regular job opening and clearances have been granted through the generation of the initial/reappointment personnel action. However please note that as part of the onboarding process, Umoja must be used to request index number and *inspira* <u>Offer</u> <u>Management Module</u> must be used to request medical clearance. With this caveat, the onboarding workflow can be said to begin right after the time when *inspira* Offer Management has been completed and can involve the submission and processing of documentation on-line or off-line. The process requires considerable advance preparation on the part of the HR Partner and staff member.

Initial Appointments

These processes are used in the administration of international Initial Appointments.

 <u>Staff member/Selected candidate's Responsibilities after the offer</u> management workflow:

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- <u>HR Partner's Responsibilities after the offer management</u> workflow:
- Standard Global Procedures (Preboarding ECC PA40):
- Standard Global Procedures (Onboarding ECC PA40):

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15.2.1. Process Household Members

The process differs depending on whether the submission is for

- · a new family member or dependant, or
- a modification of an existing household member or dependant.

The process is as follows:

Dependency/Household member requests for NEW family members (ESS Workflow)

- 1. The staff member submits original documentation offline for verification by the HR Administrator, who stamps and dates a copy as seen and verified and returns the originals to the Staff Member.
- After checking the Staff Member's family profile and ensuring this is not a duplicate record, Staff Member or HR Administrator enters personal data related to dependency (marriage, newborn child, etc.) in ESS and, if applicable, requests dependency benefits. If no dependency benefits are requested, the approval will be for a household member.
- 3. As part of the submission, the Staff Member or HR Administrator needs to upload the previously verified supporting documentation as an attachment.
- 4. The HR Partner reviews the information provided by the Staff Member in ESS against the verified documentation submitted as attachments and approves if appropriate. The HR Partner will reject applications that are not complete (including missing or not verified documents) explaining the reason for the rejection and pointing out any missing documents, etc. If rejected, the Staff Member or the HR Administrator on behalf of the Staff Member must submit a new application as the system does not allow modification of the current application based on the feedback received at the time of rejection.
- 5. Once the approval is made in ESS, the dependency data is updated in ECC and an

automatic notification of the approval is sent by the system to the Staff Member.

MODIFICATION of data for an EXISTING household member/dependant (Offline and ECC Workflow)

If the Staff Member already has an approved household member or dependant and they want to change some information, the request must be submitted offline to the HR Partner.

- The Staff Member submits a written request to the HR Partner using the P.85 form and clearly indicating what they need to change about a dependant/household member. Some of the most common modifications are:
 - Request for a dependent status or discontinuation of dependency status of a recognized spouse
 - Request to discontinue dependency benefits for a dependent child or secondary dependant.
 - Request for special dependency for a dependent child.
 - These requests require submission of supporting documentation that shows that the conditions to obtain or discontinue the dependency status have been met. Please refer to the table above for specific details on required supporting documentation.
- 2. Upon receipt of the request the HR Partner reviews, and then approves or rejects it. If approved, the data will be entered by the HR Partner directly in ECC and once the PA is approved, Umoja will send an automatic notification to the Staff Member.

Special Dependency Requests

If the Staff Member's child has a disability, certification of the disability from the Medical Services Division (MSD) must be obtained prior to making the special dependency request. [Offline]

For a NEW dependent child (ESS Workflow)

If the Staff Member has never requested dependency for the child, then the Staff Member or HR Administrator on behalf of the Staff Member can submit the special dependency request in ESS.

 The Staff Member submits a request for certification of special dependency to MSD along with the child's medical reports and school reports, if available and requested by MSD. The HR Partner receives a copy of the request only (but not the medical reports). [Offline]

- MSD determines the eligibility for Special Dependency and the next review dates. [Offline]
- 3. The Staff Member and HR Partner receive feedback from MSD. [Offline]
- 4. The Staff Member or HR Administrator on behalf of the Staff Member creates a request for special dependency and checks the disability indicator in ESS, making reference to the communication from MSD in the remarks and attaching the approval from MSD to the ESS request.
- 5. Upon receipt of the request the HR Partner reviews, and then approves or rejects the request in ESS.
- 6. The system will send an automatic notification to the Staff Member regarding the approval/rejection of the special dependency and the next review date.

For an EXISTING dependent child (ECC Workflow)

If the Staff Member already has the child as a recognized dependent, then the request for special dependency is considered a modification of a dependency status and the request must be submitted offline to the HR Partner.

- The Staff Member submits a request for certification to MSD along with the child's medical reports and school reports, if available and requested by MSD. The HR Partner receives a copy of the request only (but not the medical reports). [Offline]
- 2. MSD determines the eligibility for Special Dependency and the review dates. [Offline]
- 3. The Staff Member and HR Partner receive feedback from MSD. [Offline]
- 4. The Staff Member submits a request to the HR Partner to modify the dependency status of the child. [Offline]
- 5. Upon receipt of the request the HR Partner reviews the request and if approved, modifies the dependency status of the child in ECC.
- 6. The Staff Member will be notified regarding the approval/rejection of the special dependency and review date. [Offline]

In exceptional circumstance in which ESS is not accessible for either the Staff Member or the HR Administrator, the HR Partner may also receive all the original documentation in hard copies and process the approval of dependency in ECC using a PA40. The procedure section documents how to approve in both ESS and in ECC.

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Staff member/Selected candidate's Responsibilities after the offer management workflow:

- Inform the receiving office of the first available date for reporting for duty via My Onboarding in *inspira*;
- 2. Obtain visa, if applicable;
- 3. Provide travel information (closest airport, number of dependants traveling with/without the staff member, etc.) and travel to the duty station to report for duty;
- 4. Complete induction paperwork sent offline;
- Meet with HR Partner on entry on duty (EOD) date (or soonest business day thereafter) to review induction paperwork and satisfy any verification requirements (i.e. verification of original required documentation);
- 6. Report to receiving office/manager to assume duties;

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HR Partner's Responsibilities after the offer management workflow:

- 1. Request visa, if applicable, and process, if necessary, a Preboarding Personnel Action to initiate travel;
- 2. Approve the initial appointment HR travel for the new staff member and eligible dependents;
- Advise the selected candidate of the required original documentation to be verified during induction prior to reporting for duty and request an advance copy of documentation for dependents so travel can be authorised for these family members;

- Induct the new staff member verify all original personal documents (i.e. birth certificate, passport, visa, etc.), and advise the new staff member to complete all off-line documentation (i.e. Declaration, Designation of Beneficiary, etc.). Provide brief inperson introduction to the Organization;
- 5. File all required documents in the new staff member's OSF (both hard and digital copies);
- 6. Process Initial Appointment PA in conjunction with the pre-requisites listed below;
- 7. Process in ESS any requests for movement related entitlements that the staff member may be entitled to (assignment grant DSA and lump-sum, relocation grant).
- 8. Approve the designation of beneficiary in ECC.
- 9. Process the addition of dependants. In cases of staff members who needed to travel, spouse and children would already have been set up as household members and so the HR partner may need to update this information to set them up as dependants. If required, this transaction is always made by the HR partner in ECC as it is a modification of an existing record.

If the staff member did not require travel, technically they should be able to use ESS to create household members or dependants. However given that the generation of the EIDMS account may take a few days and that the staff member has presented all original documentation for dependants for verification as part of the onboarding process, the recommendation is to have the HR partner approve the new household members or dependants directly in ECC as part of the onboarding process.

10. Run payroll simulation to confirm that payment will be made as per the PAs executed.

The approval of an Initial Appointment PA for an international Staff Member requires you to define the data for the candidate. It is therefore extremely important to complete it accurately to avoid data correction at a later date.

It is vital that the HR Partner has reviewed the policy and practice for this appointment type, gathered the prerequisite documentation, and has reviewed the information in the system before the finalization of the approval. At the present time, the HR Partner executes a Personnel Action directly in ECC for initial appointments and reappointments.

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Standard Global Procedures (Preboarding ECC – PA40)

In the case of international staff members who are being travelled by the Organization, a Preboarding PA is processed to enable the processing of the staff member's entitlement to travel. Additionally, the pPreboard PA is needed when a staff member is separated in one duty station and is reappointed in a different duty station to which the staff member will be travelled. The preboard PA is used in this situation to change the Staff Member's organizational unit, thus ensuring that the proper entity is charged for the travel and that the travel request is routed to the right HR Partner for approval.

As of the time of publication of this job aid, the *inspira* interface is not functional and the HR Partner must therefore complete the Preboard PA in ECC.

1. After the HR Partner has received medical and reference clearances for the candidate and a confirmation of appointment has been issued, the HR Partner coordinates with the hiring manager and the selected candidate to confirm their start date.

2. Once a date has been agreed upon, the HR Partner executes a Preboarding PA in ECC to allow the request of the candidate's entitlement to travel the candidate.

Standard Global Procedures (Onboarding			
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Standard Global Procedures (Onboarding ECC – PA40)

If there is no travel, then the preboard PA is not required and the HR Partner can execute the initial appointment PA without additional steps.

1. The staff member completes offline form(s) and submits to the HR Partner.

2. The HR Partner reviews form(s) submitted by the staff member and if completed correctly, executes the related personnel action in the system.

3. HR Partner executes an Initial Appointment PA in ECC inputting and saving the proper

information into each infotype.

4. If applicable, the HR Partner requests any movement related entitlements that the staff member may be due through the portal (i.e. DSA, lump-sum payment, relocation grant).



15.3. Finding Policy, Guidance and Practical Advice

To learn how to:

- 1. The <u>Policy Portal</u> for Staff Regulations and Rules, and the Administrative Instructions of the Organization.
- 2. The <u>HRSD Knowledge Management Platform</u> for guidance and practical advice on how to apply the Staff Regulations and Rules. This is also where you'll find the Umoja Job Aids for step-by-step instructions about how to execute transactions in Umoja.

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15.4. InfoTypes

Also called information types, are sets of related data grouped together according to subject matter and identified by their four-digit key. Infotypes are used to maintain master data in ECC. In the case of Human Resources Management, the infotypes used by HR Partners are related to staff members' personnel information.

There are predefined number ranges that Umoja (SAP) has defined for Infotype.

- HR and Payroll Data Infotype \rightarrow 0000 to 0999
- Organizational Data \rightarrow Infotype 1000 to 1999

• Time Data \rightarrow Infotype 2000 to 2999

Infotype #	Description	More Info
	Infotypes Header	
0000	Actions	
0001	Organizational Assignment	
0002	Personal Data	
0003	Payroll Status	
0006	Addresses	
0007	Planned Working Time	
0008	Basic Pay	
0016	Contract Elements	
0017	Travel Privileges	
0021	Family Members/Depentents	
0041	Date Specifications	(i)
0105	Communications	
0185	Personal IDs	(1)
0267	Additional Off-Cycle Elements	
0487	Security/Medical Clearance	
0960	NPO Mobility and Hardship Allowance	
0961	NPO Pension Funds	í
0962	NPO Rental Subsidy	
0963	NPO Agency for Loan or Secondment	
2001	Absences	
3244	NPO Entitlement Country and City	í
3344	NPO Assignment	
9003	Entitlement Monitoring	

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IT0000 (Actions)

This infotype displays an overview of all the important changes in an employee's record (change of duty station, separation, renewal of contract, etc.). **This infotype cannot be skipped.**

It consists of the three following sections:

- **Personnel action** comprises two fields.
 - **Action Type** (the first field) selects the infogroup launched to execute the required Personnel Action, while
 - Reason for Action (the second field) records the reason why the action is being executed. For instance, if *Initial Appointment* is selected as the Action Type, the Reason for Action may be *interagency transfer* or *maternity leave replacement*, etc.

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

- **Status** indicates the employee's entries into and exits from the Organization. This data is used for reporting purposes. The Status field cannot be edited; it defaults to "active," "inactive," "retiree" or "withdrawn" based on the Action Type and Reason for Action previously selected. For instance, if you select "Initial Appointment" for Action Type, Status will default to "active."
- **Organizational assignment** records the Position, Personnel area, Employee Group and Subgroup the data needed for Payroll calculation.

Specific uses: ONBOARDING

- A. Always select the staff member's EOD date as the Start date.
- **B.** Select the relevant option for Reason for Action. Note that the menu options marked with an asterix are no longer active and therefore can no longer be selected.
- C. Enter the Position* number. It automatically populates the group Employee and subgroup fields. Therefore, if the wrong Employee group had been selected during the Preboarding PA, now would be your only chance to fix the error. Before entering the position, make sure that it is vacant.

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Additional information about the Position and its uses is available below.

Umoja Organizational Management Overview



IT0001 (Organizational Assignment)

This infotype stores data pertaining to the staff member's relationship to the organizational and personnel structures — essential data for Payroll.

This infotype cannot be skipped.

It consists of the three following sections:

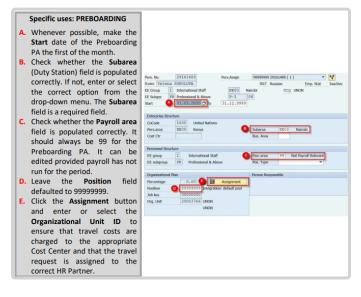
Enterprise Structure

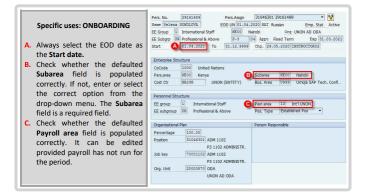
The CoCode (Company Code), Pers.area (Personnel area), and Cost Ctr (Cost Center) fields default to the value entered for Position in infotype Actions (0000). They cannot be edited in this infotype.

Personnel Structure

The EE group (Employee group) and EE subgroup (Employee subgroup) fields 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.

 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.







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Last modified: 17 March 2022

IT0002 (Personal Data)

This infotype stores personal related data, such as a First and Last names, Date of Birth, Gender, Nationality, etc.

Appears in Initial Appointment only.

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

Specific uses: PREBOARDING

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.

Specific uses: ONBOARDING

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.

Pers. No.	29161489 Pers.Assgn 31046301 29161489 🗣
Name Yelena SC	DKOLOVA EOD UN 01.04.2020 NAT Russian Emp. Stat Active
EE Group 1 1	international Staff KE00 Nairobi Org UNON AD ODA
EE Subgrp PR F	Professional & Above P-3 04 Appt Fixed Term Exp 31.03.2021
Start 01	1.04.2020 To 31.12.9999 Changed on 01.06.2020 INSTRUCTOR02
Name	
Title	Miss 💌
Last name	SOKOLOVA Birth name
First name	Yelena
Middle Name	
HR Data	
Date of Birth	02.08.1977
UN National	Russian Othr/Birth
Marital Status	Single Since 02.08.1977
Additional Fields	
City of Birth	Camapa
Country of Birth	Russian Fed.
Gender	Female 💌
Additional fields	
Single Parent	

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Last modified: 2 September 2021

IT0003 Payroll Status

Lists information regarding the staff members Payroll status as locked or not and other key fields important for payroll calculation and retro.



IT0006 (Addresses)

This infotype stores the staff member's contact information. The mailing address is mandatory and indispensable for the creation of the staff member's Business Partner (BP) number. Without this number, the Staff Member can neither be travelled nor paid.

Appears in Initial Appointment only.

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

It consists of the two following sections:

- Address
- Communications

ypes for Addresses (0006)		
7	STy	p Name
ions or subtypes will	1	Mailing Address
t, then the infotype the subtype selected.	2	Permanent Address
	3	Emergency Contact
es can be selected by e drop-down ID Type.	4	Duty Station
ne drop down ib rype.	5	TDY Address
	6	Tax Purposes
	7	Family Address (Prior D

Specific uses: PREBOARDING	
A. Enter the staff member's mailing address.	Pers. No. 29161489 Pers.Assgn 31046301 29161489 Pers. Name Yelena SOKOLOVA EOD UN 01.04.2020 NAT Russian Emp. Stat Active EE Group 1 International Staff KE00 Nairobi Org UNON AD ODA EE Subgrp PR Professional & Above P-3 04 Appt Fixed Term Exp 31.03.2021 Start 01.04.2020 to 31.12.9999 Start Sta
B. Enter the staff member's cell phone.	Address
Specific uses: ONBOARDING	Address type Mailing Address Address line 1 A Address line 2 1234 Place Street City/county Moscow
The Permanent Address and Emergency Contact are available	State/zip code Country Key Russian Fed. Communications
subtypes. Information pertaining to these subtypes can either be	Communication B CELL 35214568
entered at this point by the HR Partner or later by the staff	
member through the Employee Self-Service (ESS) portal.	

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Last modified: 17 March 2022

IT0007 (Planned Working Time)

This infotype stores data pertaining to the staff member's work schedule. This infotype cannot be skipped.

It consists of the two following sections:

• Work schedule rule

This section displays the staff member's weekly working schedule and start day of the week (different duty stations have different start days).

Working time

This section is not editable and indicates the number of working hours and days for all Staff Members.

	Specific uses: ONBOARDING											
A	Select the work schedule from	Pers. No.	29161489		Per	s.Assgn	31	046301	29161489		•	93
	the menu options. Most staff	Name Yelena	SOKOLOVA		EOD (JN 01.	04.2020	NAT	Russian	Emp. Sta	t	Active
	members will have a normal	EE Group 1	International	Staff		KE00	Nairobi			UNON AD ODA		
	work schedule but there are exceptions. So be sure to select	EE Subgrp PR Start	Professional	-	31	P-3		Appt	Fixed Term	Exp	31.(03.2021
	the appropriate one.	Work schedule ru Work schedule ru		NORM	1	Konup Me	rmal 27k	1				
В.	Always select 9 - Time evaluation of planned times.	Time Mgmt statu		4		Kenya No ation of p		-			•	
		Working time										
ті	me evaluation will not run if 0 –	Weekly working I	nours	4(0.00							
n	o time evaluation is selected, and	Weekly workdays	i		5.00							
	e attendances and absences me quotas will not be created.											

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TERMS OF USE

Last modified: 17 March 2022

IT0008 (Basic Pay)

This infotype stores data pertaining to the staff member's Group/Level (Grade/Step) and salary information. Payroll simulation can be run in this infotype. This infotype cannot be skipped.

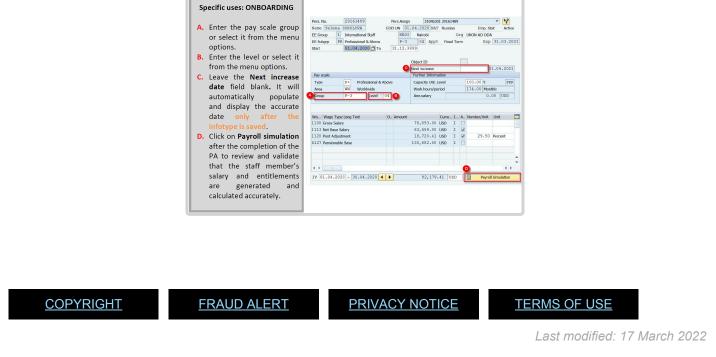
It consists of the two following sections:

• Pay scale

The Type and Area fields default to values based on the EE group and subgroup. Payroll will not run if the Group and Level fields are not filled out.

Wage Type

The Wage Type and Amount fields will populate only after the infotype is saved.



IT0016 (Contract Elements)

This infotype stores data pertaining to the staff member's contract including but not limited to Contract Type, Recruitment Type, Contract Status and Term, and Contractual Payment Status. This infotype cannot be skipped.

It consists of the three following sections:

- Contract Regulation: type and duration of the contract.
- Additional field: recruitment information, contract status and terms.
- Remarks: applicable only to the instances in which a remark in the "Special conditions" section of the Letter of Appointment (LOA) is needed.

Specific Uses: ONBOARDING

- A. Never change the **To** field. It shows the validity date of the record, not the end date of the staff member's contract.
- B. Select the relevant option for Contract Type.
- **C.** Enter the expiry date of the staff member's contract.
- D. Select the relevant option for Status ID. Status ID refers to the method of recruitment.
- E. Select the relevant option for Recruitment Indicator. This field is for record purposes only. It shows whether the staff member required travel.
- F. Select the relevant option for Contract Status.
- **G.** Enter comments in **Remarks** only if needed.

ers. No.		29161489		Pers.	Assgn	31	046301	2916148	9		*	63
Name Yel	ena s	SOKOLOVA		EOD UN	01.0	04.2020	NAT	Russian		Emp.	Stat	Active
E Group	1	International	Staff	6	KE00	Nairobi			org L	NON AD O	DA	
E Subgrp	PR	Professional	2122212		P-3	04						
lart		01.04.202	20 🗇 To	31.	12.999	99 🙆						
Contractual	Pogui	ations		_								
Contract Ty	-	-	Fixed Ter	m		-	Vali	d Until		0	31.03.	2021
contract 1	PC	-	rixed rei		_		Vuin	u ondi		- et		2023
Additional f	ields											
Rules Serie	s ID					-						
Status ID		•	CRB recru	uitment		*						
Recruitmen	t. Indi	cator		E Y	es	1114			-	-		
Contract St	atus			0	ther					-		
Contract Te	rm									*		
Contractual	Paym	ient Status Or	der	P	rorated					•		
G												
Remarks									-			
									_		-	
-									-		-1	
											_	

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Last modified: 17 March 2022

IT0017 (Travel Privileges)

Staff members who were separated in the precursor to Umoja, IMIS, (whose records may or may not have been uploaded to Umoja) will not have a preboard PA in their Umoja history and will be missing IT0017, the infotype needed for travel.

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Last modified: 10 March 2022

IT0021 (Family Members/Dependents)

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Household members/Dependents no longer have an individual index number. In Umoja, the HHM/dependents will have a unique identification number that is a derivative of the staff member's index number. The family member's identification number will include the index number of the staff member and an extension (01xx for spouse, 02xx for children and 03xx for stepchildren.

As an example, a Staff Member with Index Number 12345678 has a spouse, two children and one stepchild. They would have the following identification numbers: 12345678-0101, 12345678-0201,12345678-0202 and 12345678-0301.

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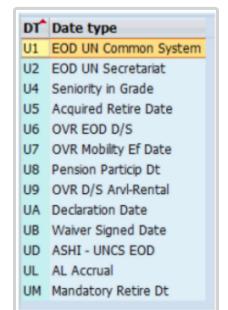
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Last modified: 17 March 2022

IT0041 (Date Specifications)

This infotype lists the important dates in a staff member's professional life. The 13 date types listed include the Entry on Duty (EDO) dates with the UN Common System and UN Secretariat, the Seniority in Grade and Retirement dates. This infotype cannot be skipped.



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The <u>EOD UN Secretariat date</u> is the initial date of uninterrupted service or latest entry date without a break in service, of a staff member with the UN Secretariat on appointment, reappointment, transfer, secondment or loan under the Inter-Organization Agreement.

The <u>EOD UN common system</u> is the initial date of uninterrupted service of a staff member, whether with the UN Secretariat or its Funds and Programmes, or any entity of the UN Common System.

The *UM Mandatory Age of Separation* field will automatically be set to the last day of the month the staff member turns 65.

The *U5 Acquired Right to Retirement* date field does not apply to new staff members unless they transfer from another agency with an existing acquired right to retire at 60 or 62.

Enter the initial uninterrupted date in the Common System in the U! field.

Enter the Start date of the PA in the U2 field.

Create the *U4 Date type*, then enter the EOD date. For interagency transfers, enter the Start date of the PA if the staff member has been promoted or the Seniority in Grade date (provided in the administrative details by the releasing entity) if he/she joins the Secretariat at the same grade level.

Create a *U9 Date type*, then enter the date the staff member arrived at the duty station (if different from the EOD date).

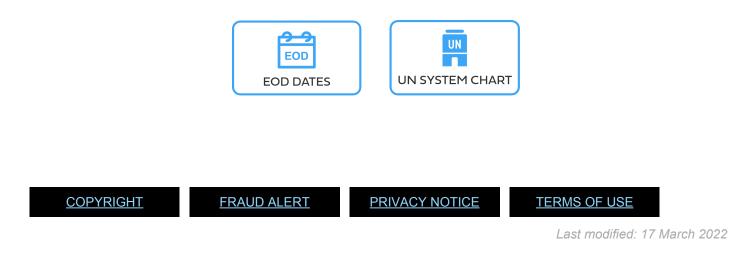
Create a UA Date type, then enter the date the staff member signed the Oath of Office.

					- 64	
		Emp. Stat	Active			
Staff	KE00 Na	irobi	Org UN	ON AD ODA		
Above	P-3 0	4				
to 31	.12.9999					
Date		Dat	e type	Date		
Date		Dat	e type	Date		
01.04.202	0	U2	EOD UN Secretariat	01.04.	2020	
01.04.202	0	U9	OVR D/S Arvi-Rental	02.04.	2020	
03.04.202	0	UM	Mandatory Retire Dt	31.08.	2042	
	Date 01.04.202 01.04.202	Above P-3 0 to 31.12.9999	Above P-3 04 to 31.12.99999 Date Dat 01.04.2020 U2 01.04.2020 U9	Above P-3 04 to 31.12.99999 0 Date Date type 01.04.2020 U2 EOD UN Secretariat 01.04.2020 U9 0VR D/S Arvi-Rental	Above P-3 04 to 31.12.9999 Date type Date Date Date type Date 01.04.2020 U2 EOD UN Secretariat 01.04. 01.04.2020 U2 EOD UN Secretariat 01.04. 02.04.	

In cases of interagency transfers:

Create a *U7 Date type* if the staff member was granted a mobility incentive before his/her transfer, then enter the Mobility Effective date (provided in the administrative details by the releasing entity).

Create a *U8 Date type*, then enter the initial pension participation date (provided in the administrative details by the releasing entity).



IT0105 (Communications)

Lists information regarding the staff member's various forms of communication. This includes but is not limited to UN office Telephone number, UN email address, Cell Phone number, etc. **Appears in Initial Appointment only.**

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

A list of 14 options or subtypes will appear first, then the infotype based on the subtype selected.

Subtypes for Communications (0105)
A list of 14 options or subtypes
will appear first, then the
infotype based on the subtype
selected. These subtypes can be
selected by clicking on the drop-
down ID Type.

Specific uses: PREBOARDING

A. Enter the personal email address which will be useful for travel arrangement.

Specific uses: ONBOARDING

A. Enter the UN email, office telephone number and cellphone number if available.

Pers. No.		29161489		Pers	.Assgn	999	99999	29161489 (1) .	- 93
Name Yel	ena s	SOKOLOVA					NAT	Russian	Emp. Stat	Inactive
EE Group	1	International	Staff		KE00	Nairobi		Org	UNON	
EE Subgrp	PR	Professional	& Above		P-3	04				
Start		01.03.202	20 to	31.	12.9999	(
Communica										
	noite	-								
Туре		MAIL	Personal			-				
ID/number		A solo	cova@gmai	il.com						
		_								

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Last modified: 18 March 2022

IT0185 (Personal IDs)

This infotype stores data pertaining to the staff member's Personal Identification (IDs) documents, including but not limited to Visa, Passport, LP, Birth Certificate, etc. Appears in Initial Appointment only.

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

					_	Desc	-	on				
						G4 V						
	Subtypes for Personal IDs	(0185)				G5 V						
		• •				Perm		dent				
						B1 V						
	A list of 24 options or subty	/pes_will				82 V		_				
	appear first, then the infotyp	be based				U.S.						
	on the subtype selected					Non						
										y Card		
	subtypes can be selected by	clicking				Carte		egiti	matio	n		
	on the drop-down ID Type.					Passp Passp						
	on the drop down ib type.					Drive						
						LP1	rs Lic	ence				
						LP1						
						LP2						
						LP3						
						Birth	Corti	ficate				
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						Trave						
										n Affairs		
						Natio			oreigi	i / tirdii 5		
						U.S.						
						Tax I			ion Nu	mber		
Entorivi	sa and passport information.	Pers. No.	29161489		Pers.	ssgn	99	999999	291614	89(1)		-
		Name Yeler	a SOKOLOVA					NAT	Russian		Emp. Stat	
Rememb	per to check the information		1 International	Staff	2	E00	Nairobi			Org UN		
against	the original documents				12	-3				org on		
-	he staff member's induction.	EE Subgrp	PR Professional	224 N V 0 C 2			04					
uuning u	le stan member s induction.	From	01.03.202	to to	31.1	2.9999						
Spe	cific uses: ONBOARDING	Personal IDs			_				-			
		ID type	Pa	ssport1				*				
Skin this	s infotype if already created											
		ID number	12	3458								
	individual infotype and		100	200 M 10								
as an												
	filled out.											
properly												
properly Optiona	l: Create a subtype per											
properly Optiona		Date of issue	1.	1.2015								
properly Optiona documer	l: Create a subtype per	Date of issue Valid to	·	1.2015								
properly Optiona documer	I: Create a subtype per nt submitted, then enter the		31	summer and the summer state of the summer stat								
properly Optiona documer	I: Create a subtype per nt submitted, then enter the	Valid to	a Mo	.12.2025	~)				

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IT0267 Additional Off- Cycle Elements

Lists information about the disbursed amounts of offcycle payments (Education grant, DSA, lump sum, etc.)

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 Last modified: 2 September 2021

IT0487 (Security/Medical Clearance)

This infotype stores data pertaining to the staff member's security clearance, medical clearance and background screening. It can be created prior to executing a PA in order to request medical clearance.

As part of the OM workflow, medical clearance for the following medical clearance types can only be initiated in *inspira*:

- Change of Duty Station
- Pre-recruitment
- Type of Job

Medical clearance in Umoja can only be initiated for:

- Non-inspira recruitment/movement
- Extension beyond retirement
- Extension of appointment

So always check with the onboarding team whether the medical clearance request has already been submitted in *inspira*. Once the cleared by MSD Earthmed will update Umoja and the staff member records will show as M2 Medically cleared.

If the medical clearance has already been requested by the onboarding team in *inspira*, you must skip this infotype.

If you are initiating the medical clearance in Umoja, the infotype consists of the three following sections:

- Clearance Information
- Remarks
- Additional fields

As a result of improvements to the interface between Umoja and EarthMed, additional information is required when submitting Medical Clearance requests. Infotype 0487 now includes a Duty Station field, which must be completed with the personnel subarea code for the duty station at which the staff member will be working. This field is required for both onboarding and change of duty station medical clearances.

- 1. Follow the Preboard Request Medical Clearance procedure documented in the Onboarding job aid.
- 2. On infotype 0487 (Create Security/Medical Clearance) select
 - _MCLR _for Clearance Type,
 - Non-inspira recruitment/movements for Clearance Category
 - *Medical Requested* for Application Status which creates a reference number. When the Medical Division approves the request, whether initiated in *inspira* or Umoja, the status will automatically change to *Fit*.
 - then enter or search for the Duty Station (Personnel Subarea) at which the Staff Member will be working. When searching using the Duty Station Text field, the * wild card character can be used.

Pers. No. 777815 Pers.Assgn 99999999 00777815 (1)	
Name Noel NGOKENG EOD UN 15.12.2020 NAT Cameroonian Emp. Stat Inac	tiv
EE Group 3 Conf Language Staff ET00 Addis Ababa	
EE Subgrp IR Translator T-IV M9 Appt Non Active Status	
Start 11.01.2023 to 31.12.9999	
Clearance Type MCLR Medical Clearance	
Clearance Information	
Clearance Category 10 Non-inspira recruitment/movements	
Application Status M1 Medical: Requested	
Reference Number 00777815230111212031	
Remarks	
Additional fields	
Duty Station ET00 Addis Ababa	
Sequence No. 0	



It is mandatory to complete the Duty Station field even though you can currently validate and save the record without providing a value. A change will soon be implemented making Duty Station a required field.

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Last modified: 12 January 2023

IT3244 (NPO Entitlement Country and City)

This infotype stores the data pertaining to the staff member's Entitlement eligibility such as Place of Home Leave, Place of Recruitment, Place of Permanent Residence, etc.

It can be created as an individual infotype.

Subtypes for NPO Entitlement Country and City (3244)

A list of 8 options or subtypes will appear first, then the infotype based on the subtype selected.

HOLV Place of Home Leave

- PFV Place of family visit
- PHC Place of Home Country
- POR Place of residence Temp Lang
- PPD Place of Professional domicile-Temp Lang
- PPR Place of Permanent Residence
- RECR Place of Recruitment
- ROCD Residence outside commuting distance

Specific uses: ONBOARDING		
For international staff members,		
create the record for the following subtypes:	Pers. No. 29161489 Pers. Assan 31046301 29161489	0 - 3
HOLV - Place of Home Leave	Name Yelena SOKOLOVA EOD UN 01.04.2020 NAT Russian Emp. Stat	Active
RECR - Place of Recruitment	EE Group 1 International Staff KE00 Nairobi Org UNON AD ODA EE Subgrp PR Professional & Above P-3 04 Appt Fixed Term Exp 31.0	3.2021
	Start 01.04.2020 To 31.12.9999	
Without this record in the system,		
home leave requests will not be	NPO Entitlement Country and City	
approved, and the system will not calculate the repatriation grant at	Country & City Type HOLV Place of Home Leave Country A RU Russian Fed.	
the time of the separation.		
	City B MOSCOW	
A. Select the country of home		
leave from the menu options.		
B. Enter the name of the city .		

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Last modified: 17 March 2022

IT3344 (NPO Assignment)

This infotype stores data pertaining to the staff member's assignment. This infotype cannot be skipped.

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It consists of the three following sections:

• Organizational Assignment: non-editable information related to the characteristics of the Position derived from infotype (0001).

• Movement/Travel Requirements: indicates whether the Organization arranges for the Staff Member's travel and displays the entitlements associated with the travel. This information is for record purposes only and does not generate payment of these entitlements to the Staff Member.

Position Occupancy Details: includes the Expiration and Position Occupancy Clock.
 The Expiration field is used to enter the end date of the temporary movement (assignment, loan or secondment) or SLWOP and only appears in Temporary Movements PAs. The Position Occupancy Clock indicator provides a way to record Staff Members' position occupancy durations. It is one of the key factors in determining their participation in managed mobility.

Spe	ecific uses: ONBOARDING		
	ect Permanent movement 1) for all types of Onboarding	Name Yelena SOKOLOVA EOD UN O100001 Emp. Stat A EE Group 1 International Staff KE00 Nairobi Org UNON AD ODA	
B. Sele req app onk Sele you opt	ect YES if the staff member uired travel (for initial pointment or any type of poarding appointments). ect NO if he/she did not. If i select NO, the Shipment cion and Shipment details ds will not be available.	Assignment Type Permanent Movement Organizational Assignment (from Infotype 0001) Position: 31046301 P3 1102 ADMINISTRATIVE OFFICER Id 5 Duty Station: Nairobi Org.Unit: UNON AD ODA Start Date: 01.04.2020 Manager: Carr Fhilip Position Type: Established Post Fund: Unknown Change Reason: Cost Center: : Unknown Movement / Travel Requirements	4058
shij pre	pose the appropriate oment options if you viously selected YES .	Shipment option C Unaccompanied Shipment (Assign/C_ Shipment details P RLG @Dependent rate	g
shi	pose the appropriate oment details if you viously selected YES .	Position Occupancy Detail	
fro	vays choose the Reset option m the drop-down menu en executing Onboarding s.	Position Occupancy Number 2	

Reason for release

Position Occupancy Detail is an enhanced configuration necessitated by the implementation of Managed mobility (<u>ref. Section 15.2 of ST/AI/2016/1 dated 28 December 2015 on Staff</u> <u>selection and managed mobility system</u>). The objective of this enhancement is to provide a way to record Staff Members' position occupancy durations, which will be one of the key factors in determination of Staff Members' participation in managed mobility.

- <u>Section 1</u> provides the definition of Position Occupancy Limit:
 - Maximum position occupancy limit: the maximum period of time a Staff Member is normally allowed to serve in a rotational position. The maximum position occupancy limit shall be seven years for duty stations classified as H and A, four years for duty stations classified as B and C and three years for duty stations classified as D and E, as established by the International Civil Service Commission;
 - Minimum position occupancy limit: the minimum period of time a Staff Member is normally required to serve in a rotational position prior to choosing to participate in a managed mobility exercise. The minimum position occupancy limit shall be two years of continuous service in a position in duty stations classified as H, A, B and C, and one year of continuous service in duty stations classified as D and E as established by the International Civil Service Commission
- Section 16.1 to 16.6 further states that

Procedure Change

IT 3344 is part of the infogroup when processing a good number of HR PAs, namely onboarding (initial appointment, reappointment, reinstatement), permanent movement (reassignment, transfer, promotion) temporary movement (assignment including temporary grade, temporary promotion, interagency loan), loan w/in Umoja entities and secondment, contract extension/renewal, modify post incumbency, special leave without pay, or separation.

The Position Occupancy detail is a new mandatory section in the NPO Assignment infotype (IT3344) in Umoja's PA module specifically designed to record how the current movement affects the position occupancy limit for purposes of implementation of managed mobility.

New section in IT3344 – Position Occupancy Detail

- HR Partners who have access/means to update IT3344 will be required to maintain this section.
- In IT3344, both fields Expiration and Position Occupancy Clock are mandatory, and under the new configuration, the system requires users to update these two fields first before completing other sections in the infotype. The expiration field is used to enter the end date of the temporary movement (assignment, loan or secondment) or SLWOP and only appears in these PAs. If the expiration field appears, start with this field and then proceed to the Position Occupancy Detail. If there is no expiration field, start with the Position Occupancy Detail. If you do not complete them in this order, you will get an error message

Position Occupancy Clock – This field is used to specify how the current movement affects the position occupancy duration.

Options:

- Reset Used for
 - onboarding (initial appointment, reappointment and incoming interagency movements); or
 - permanent movement (transfer, promotion and reassignment only) PAs to show that the Staff Member occupies a new position which resets the position occupancy clock count to 0.

When this is selected, a new position occupancy number will be automatically assigned by the system upon saving the infotype. This number serves to track the length of the post occupancy even if it spans over various HR movements.

- Resume/Continue Used upon
 - contract extension/renewal on the same position or when the position changes for administrative purposes but the functions continue to be the same;
 - start of a temporary movement (assignment, loan or secondment) or SLWOP with a duration of less than a year; or
 - return from temporary movement or SLWOP, regardless of the duration to signal that the position occupancy clock continues from the count initiated on a previous position.

When this option is chosen, the Position Occupancy Number field (containing the Umoja generated number created to track assignments) becomes active for selection. Click dropdown to display a pop-up window displaying all previous IT3344's Position occupancies, if any, together with the movement type (PM, TA, SL, etc.), and the Start and Expiration date of the period, plus the duration (in months & days).

When you select Resume/Continue, **always pick the last record** that has an expiration date of 31.12.9999 and then click is to confirm selection. The Umoja generated selected position occupancy number will then display in the Position Occupancy Number field.

- Suspend Used upon
 - start of temporary movements or SLWOP with a duration of one year or more; or
 - extension of temporary movements or SLWOP when the total period of assignment or SLWOP adds up to one year or more to temporarily suspend the position

occupancy clock.

- **Not applicable** Used for Staff Members who are not subject to managed mobility. This includes employee group-subgroup 2 through 6:
 - 2 (local staff);
 - 3 (Conference Language Staff);
 - 4 (WAE);
 - 5 (Special Staff);
 - 6 (R/NR Loan to UN);

As well as certain staff within employee group 1:

- JPOs
- 1-GI (International GS);
- · All international staff with temporary appointments; and
- P2 and P3 international language staff.

Not Applicable should be selected for all separation PAs

Once the Position Occupancy Detail information has been completed as per the instruction above, complete the remaining fields on this infotype following the standard instructions for the PA you areprocessing as indicated in the relevant job aids.



IT0960 (NPO Mobility and Hardship Allowance)

This infotype stores data pertaining to the staff member's mobility and cannot be skipped for internationally recruited Staff Members.

It consists of the three following sections:

NPO Mobility – non-editable fields
 Duty station indicates the Staff Member's current duty station.HS Classification refers to
 the degree of hardship a Staff Member is likely to experience in a duty station.

The EOD Duty Station date is the date the Onboarding PA takes effect. The length of time elapsing (years/months/days) is calculated from the PA process date.

The Count for Mobility box is checked for fixed-term appointments or reappointments of an initial period of one year or more, or secondments, transfers or loans for one year or more that involve a change of duty station.

• Mobility — non-editable fields

This section indicates whether the Staff Member has been granted mobility incentive. It displays the number of movements and the mobility end date. It also indicates whether the eligibility date was extended.

The Grant Effective Date field is left blank for Initial Appointment PAs because the Staff Member does not get mobility payment.

The Length of Service is calculated from the EOD date to the current date.

The Qualifying Assignments field shows the Staff Member's number of counts for mobility. It breaks down the counts by duty station.

• Non-removal

This entitlement was discontinued effective 1 July 2016. Staff who were in receipt of the nonremoval allowance as of 30 June 2016 continued to receive the allowance for up to 5 years or until they move to a new duty station.

	Pers. No. 2916	489	Pers.Assgn	3104630	1 29161489	-	43
Specific uses: ONBOARDING	Name Yelena SOKOLO	AV	EOD UN 01.0	4.2020 NAT	Russian	Emp. Stat	Active
	EE Group 1 Interna	tional Staff	KE00	Nairobi	Org U	NON AD ODA	
	EE Subgrp PR Profes	ional & Above	P-3	04 Appt	Fixed Term	Exp 31.03	3.2021
Check the Count for Mobility box	Start 01.0	.2020 🗂 To	31.12.9999)			
if applicable.		12 10 2 24 1					
	NPO Mobility and Hardshi	Allowance					20]
	Duty Station	KEO) Nairobi		• 01.04.20	20 - 30.04.202	20
	HS Classification	BA	PA - All entitlemen	ts		• •	and the second sec
	EOD Duty station	01.	04.2020	0 Yea	rs 0 Months	21 Days	
	Count for Mobility						

e sure the Mob. Exp. Date is	Granted Effective Date		Cnt Add Tot
•	Length of Serv. 21 Days	 DS H Assignments 	0 0
ect. It should be 5 years from	Qualifying Assignments 00	DS A-E Assignments	1 1
OD date.		Mob. Exp. Date	31.03.2025
Nob. Eligibility Extension and	Mob. Eligibility Extension (Exceptional)	Ovr Mob Exp Date	
r Mob. Exp. Date fields must be t blank.	Non-Removal Non-Removal Entitlement Comments		
	Line 1		
	Line 2		
	Line 3		

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IT0961 (NPO Pension Funds)

This infotype stores data pertaining to the staff member's Pension Fund contribution. This infotype cannot be skipped.

It consists of the three following sections:

• NPO Pension Funds

This section indicates whether the Staff Member is contributing to the Pension Fund, the pension number and the start date of the contribution.

- Pensionable Earnings do not edit this section
- Non-Standard Contribution do not edit this section

- 😭

Exp 31.03.2021

130,682.00 USD

Active

Emp. Stat

04.2020

Specific uses: ONBOARDING	
A. Leave the Pension Fund Number field blank. The PF Number field will be automatically populated by the batch interface that	Pers. No. 29161489 Pers.Assgn 31046301 29161489 Name Yelena SOKOLOVA EOD UN 01.04.2020 NAT Russian Emp. Stat EE Group 1 International Staff KE00 Nairobi Org UNON AD ODA EE Subgrp PR Professional & Above P=3 04 Appt Fixed Term Exp Start 01.04.2020 0 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.9999 31.12.910 31.12.9
connects Umoja to the Pension Fund database. B. Select contributing if the staff member has an initial	NPO Pension Funds PF Number Reason Fund Details Participation date 01.04.2020 Schema Stadard Schema Participation date
appointment of more than 6 months. Select non-contributing if the staff member has an initial	Pensionable Earnings Type Group Area Non Standard Contribution
appointment of less than 6 months.	Employer% Employee% IV 21.04.2020 31.12.9999 > Pensionable Base 130,68

Comments Line 1

Line 2 Line 3

C. Always choose Standard Schema when the status is set to contributing.

Leave the other fields blank.

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IT0962 NPO Rental Subsidy

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Lists information regarding the staff member's rental subsidy or deduction including but not limited to Dwelling Rent Type, Reimbursement Type, Rental Amount, Brokers Fee Amount and Pay Date, Dates of Validity, and Landlord information.

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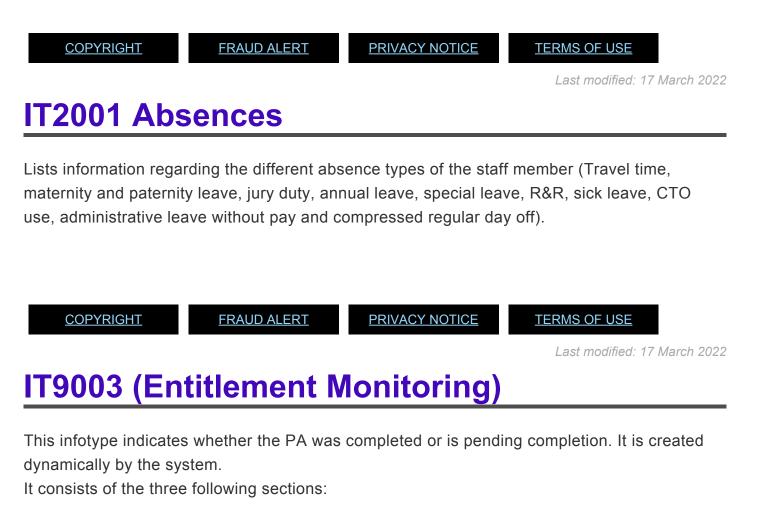
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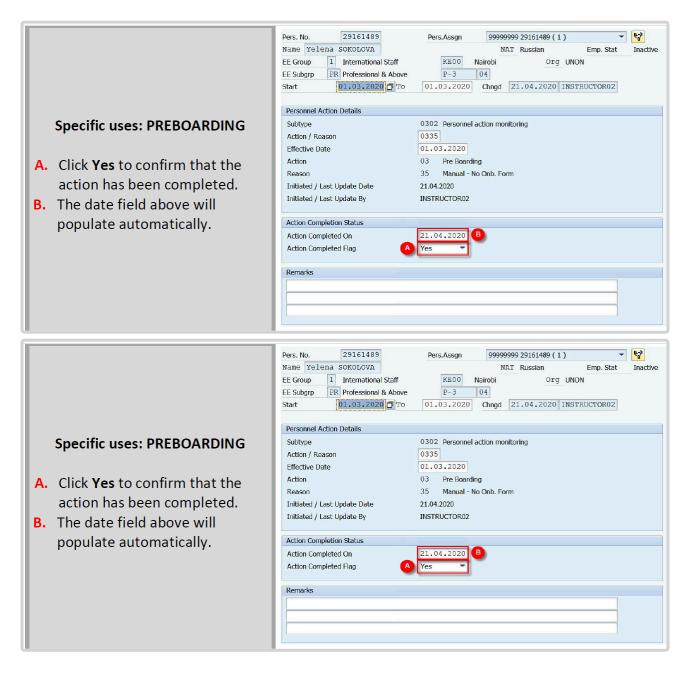
Last modified: 17 March 2022

IT0963 NPO Agency for Loan or Secondment

Lists information regarding a staff member's secondment to or from UN Agencies.



- 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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15.5. Airport Codes

IT3244, NPO Entitlement Country and City, requires you to provide the airport code for the airport the staff member will use for entitlement travel.

If the staff member lives in proximity to a major city, click on <u>World Airport Codes</u> to identify the airport code.

1. Enter the name of the city in the search box and click Search.

2. Locate the code in the IATA column (be sure to use the IATA code).

3. Enter this code in the Airport Code text box on IT3244.

If the Staff Member does not live in a major city, or there is a question as to which airport code to use, contact the travel office for assistance.

ame	Ci	ty							Count	ry			IAT	A	ΙCAO	FAA
Croisette	Ca	Cannes Dieppe						France France				JCA				
St Aubin	Di						1					DP	E	LFAB		
Calais-Dunkerque	Ca	Calais/Dunkerque						France				cq	F	LFAC		
Agen-La Garenne	Ag	Agen/La Garenne					1	France France France France France France				AG	F	LFBA		
Bordeaux-Mérignac	Вс	Bordeaux/Mérignac											BOD	LFBD		
Bergerac-Roumanière	Be	Bergerac/Roumanière Cognac/Châteaubernard La Rochelle/Île de Ré Poitiers/Blard					1					EG	с	LFBE		
Cognac-Châteaubernard (BA 709) Air Base	Co											CN	G	LFBG		
La Rochelle-Île de Ré	La						1					LRI	4	LFBH		
Poitiers-Biard	Po											PIS		LFBI		
Limoges	Lit	Limoges/Bellegarde					1	France				LIG	i	LFBL		
1 2 3 4 5 6 7 8 9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
		34	35	36	37	38	39	40	41	42	43	44	45	46	47	48
49 50 51 52 53 54 55	56	57	58	59 7	60 27	61 3	62	63	64	65	66	67	68	69	70	71

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15.6. Entry-on-Duty (EOD) Dates

The EOD reflects a staff member's continuous service. Any service that is interrupted by a separation, even if a reappointment is processed the following day, breaks a Staff Member's continuity of service. There are two EOD dates in Umoja:

- The "EOD UN Secretariat" date is the initial date of uninterrupted service or latest entry date without a break in service of a Staff Member with the United Nations Secretariat on appointment, reappointment, or transfer, secondment or loan under the Inter-Organisation Agreement.
- The "EOD UN Common System" date is the initial date of uninterrupted service of a Staff

Member, whether with the UN Secretariat, or it's Funds and Programmes, or any entity of the UN Common System.

Rules in setting the EOD dates

The basic rule in setting a Staff Member's EOD is continuity of service with the Secretariat and the Organizations of the UN Common System. If a separation action from the Organization is processed and the Staff Member is reappointed to the Organization in accordance to <u>Staff Rule</u> <u>4.17</u>, then the service is not considered as continuous between the prior and new ppointment, and the Staff Member's EOD is re-set to the date of reappointment with the Organization.



Periods of special leave without pay do not impact on any of the EOD dates, although they will affect accrual of service credits or the calculation of specific entitlements.



Resetting EODs after a separation/break-in-service has no impact on staff entitlements. Since the Contractual Reform in July 2009, for those staff recruited in accordance with the formal selection procedure under ST/AI/ 2010/3, when a Staff Member with a fixed-term appointment separates from the Organization, he/she shall be paid all accrued entitlements under the terms and conditions of his/her current appointment, including when applicable termination indemnity, repatriation grant, commutation of accrued annual leave. When a Staff Member receives a new appointment in the United Nations Common System less than twelve months after separation, the amount of any payment on the account of the above are adjusted in accordance with Staff Rule 4.17 ©. In addition, the new appointment is fully applicable without regard to any period of former service.

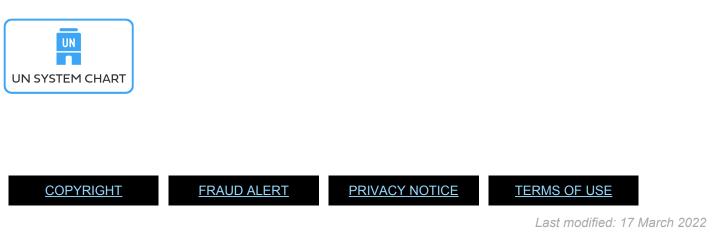
Example scenarios

EODs for UN Secretariat and UN Common System will be recorded in Umoja, the following scenarios will help exemplify those two dates.

- Scenario A
- <u>Scenario B</u>

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- Scenario C
- Scenario D
- <u>Scenario E</u>
- <u>Scenario F</u>



Scenario A

When a staff member joins the UN Secretariat on initial appointment, his/her "EOD UN Secretariat" and "EOD Common System" dates are the effective date of that appointment with the UN Secretariat.

Example: a staff member who was initially appointed to the Secretariat on 1 July 2009 and there is no interruption of service (no separation action with the Organization, will have his/her EODs as follows:

- EOD UN Common System: 01/07/2009
- EOD UN Secretariat: 01/07/2009



Scenario B

When a staff member from another UN Organization (i.e. Funds and Programmes or a UN Common System organization) joins the UN Secretariat on an inter-agency secondment, loan or transfer his/her "EOD UN Secretariat" is the effective date of his/her temporary assignment or movement to the Secretariat. However, EOD Common System date remains his/her entry-

on-duty date at his/her releasing organization.

Example: if a Staff Member joined the Secretariat on an inter-agency secondment from UNICEF on 1 January 2019, and was initially appointed with UNICEF on 1 November 2006, then his/her EODS are as follows:

- EOD UN Common System: 01/11/2006
- EOD UN Secretariat: 01/01/2019

Example: if a Staff Member joined the Secretariat on an inter-agency transfer from UNDP on 1 April 2018, and was initially appointed with UNDP on 1 August 1998, then his/her EODs are as follows:

- EOD UN Common System: 01/08/1998
- EOD UN Secretariat: 01/04/2018



Scenario C

In a case where a staff member transferred from the UN Secretariat to another UN organization and then returns to UN Secretariat under an inter-agency agreement, the "EOD UN Secretariat" will be the most recent appointment effective date with the Secretariat. The "EOD UN Common System" will be the first appointment effective date with the UN Secretariat.

Example: a staff member initially appointed with the Secretariat on 15 September 1999, who was transferred under the inter-agency agreement to UNFPA on 1 March 2005, and re-joined the Secretariat under an interagency transfer on 1 May 2019, will have his/her EODs as follows:

- EOD UN Common System: 15/09/1999
- EOD UN Secretariat: 01/05/2019

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Scenario D

If a staff member re-joins the United Nations Secretariat after a separation or retirement, his/ her "EOD Secretariat" and "EOD UN Common System" will be the effective date of his/her reappointment. A separation or retirement denotes a break in service. If followed by a Reappointment, the EODs will be reset to the Reappointment effective date, in line with Staff Rule 4.17.

Example: a staff member who was initially appointed to the Secretariat on 28 October 1992, who was separated COB 1 February 2017, and who is reappointed on 1 January 2019, will have their EODs reset to the effective date of his latest appointment:

- EOD UN Common System: 01/01/2019
- EOD UN Secretariat: 01/01/2019

By the same token, if a staff member joins the Secretariat after having separated or retired from another UN organization, he/she will have both the EOD UN Secretariat and the EOD UN Common System dates reset to that date on which he/she joins the Secretariat.

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Scenario E

If a staff member joins the Secretariat under a temporary appointment, separates from his/her temporary appointment, and is reappointed under fixed-term appointment the following day, his/her EODs will be the date of his latest appointment. EODs are not carried over between temporary and fixed-term appointment.

Example: a staff member joins the Secretariat under a temporary appointment on 9 September 2018, separates from his/her temporary appointment on 31 December 2018, and is reappointed under fixed-term appointment effective 1 January 2019, his/her EODs will be:

- EOD UN Common System: 01/01/2019
- EOD UN Secretariat: 01/01/2019

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Scenario F

If a staff member of the Secretariat resigns from his/her current appointment in a particular duty station to take a new appointment in another duty station, his/her "EOD UN Secretariat" and "EOD UN Common System" will be the effective date of his/her reappointment in the other duty station.

Example: a staff member in the General Service category who joined the Secretariat in Nairobi on 10 May 1996, resigned from his/her position in Nairobi COB 31 March 2018, and is reappointed in New York effective 1 April 2019, will have his/her EODs reset to the effective date of his/her reappointment in New York:

- EOD UN Common System: 01/04/2019
- EOD UN Secretariat: 01/04/2019



15.7. Global Onboarding Document Checklist

The HR Partner(s) should complete each section of the checklist prior to the start of any onboarding PA.

You can click on the Onboarding Checklist below to bring you directly to the site.





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15.8. Transaction Codes – T Codes

Also called transaction codes, are the codes used to execute different actions in Umoja.

Hover over each option for more information.

• PA20: Inquire

is the T-code used for displaying staff members' data.

• PA30: Update

is the T-code used to maintain staff members' data.

• PA40: Personnel Action (PA)

is the T-code used to execute Personnel Actions (PA).





Last modified: 10 March 2022

15.9. UN System Chart

Please review the "UN System Chart" to get a full overview of the organization.



15.10. Useful Terms

With the implementation of Umoja, many common terms currently used in the Organization, and in particular, used in connection with the previous system of record, the Integrated Management Information System (IMIS), have been replaced with the SAP language of Umoja. Below are just a few key terms.

• Employee Self-Service (ESS)

is the self-service portal of Umoja used by staff members to maintain personal information, request entitlements, leave, travel, benefits, view approvals, time balances, etc.

Manager Self Service (MSS)

is a self-service portal in SAP that managers will use to review and approve the requests of supervisees (leave requests, overtime, and compensatory time off.

• ERP Central Component (ECC)

is used by the HR Partner to review, process, and approve transactions related to various types of personnel actions (either initiated by the HR Partner or staff member.

Infotypes ()

also called information types, are sets of related data grouped together according to subject matter and identified by their four-digit key. Infotypes are used to maintain master data in ECC. In the case of Human Resources Management, the infotypes used by HR Partners are related to staff members' personnel information.

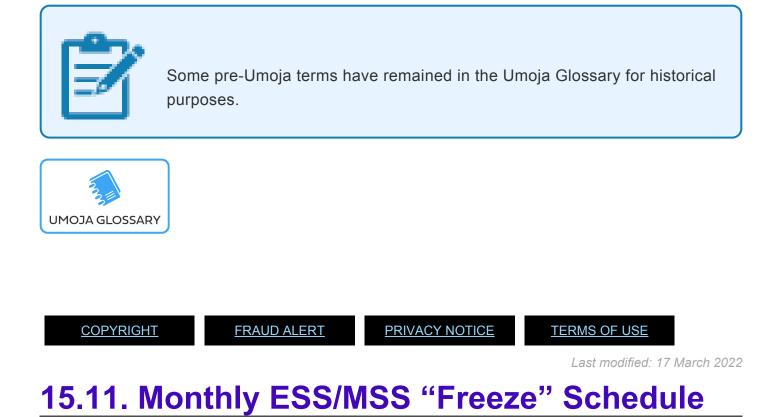
HR Partner

The HR Partner can also submit requests on behalf of a staff member and in addition the HR Partner has approval rights. However, if an HR Partner submits a request on behalf of a staff member, the request cannot be approved by the same HR Partner. Instead that request will need to be reviewed and approved by a different HR Partner. The HR Partner role also encompasses the travel administrator role so HR Partners can submit travel requests on behalf of staff members.

HR Administrator

The HR Administrator has the ability to complete requests in ESS on behalf of the staff member. After the HR administrator enters Umoja on behalf of the staff member, the actual steps to complete such requests are the same as those used by the staff member when making the request themselves.

Click on the Umoja Glossary below to review the complete list of terms.



As part of the monthly payroll processing, specific Umoja Employee Self-Service functionalities will be unavailable during the dates listed below.

Please refer to the table below for availability of ESS/MSS functionalities during the freeze:

Umoja ESS/MSS freeze due to payroll processing			
Process	Display	Request	Approval
Travel Requests	Yes	Yes	Yes
Group Travel	Yes	Yes	Yes
Shipment Requests	Yes	Yes	Yes
Travel Expense Report	Yes	Yes	Yes
All Leave Requests Except Maternity Leave	Yes	Yes	Yes
Maternity Leave Request	Yes	Yes *	Yes *
Monthly & Annual Time Statement	Yes	N/A	Yes
Personal Data	Yes	No	No
Beneficiary	Yes	No	No
Family Member Documents	Yes	No	No
Personal Documents	Yes	No	No
Bank Details	Yes	No	No
Off-Cycle Payments (HR Partners)	Yes	No	No
Letter of Appointment (HR Partners)	Yes	N/A	N/A
Health & Life Insurance Plans	Yes	No	No
Rental Subsidy	No	No	No
Family Members & Dependents	No	No	No
Address	No	No	No

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* Yes, but only for maternity leave starting after the current payroll month.

Please contact Umojapayroll@un.org with any inquiries regarding staff members in payroll areas L1, IF, I1, SS, SC and SW.

Find this message and all broadcasts on the UN Intranet-iSeek

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 Dropdown lists
 Image: Comparison of the second seco

- <u>Contract Status</u>
- <u>Contract Types</u>
- Date Type Menu
- Employee Group Menu
- NPO Entitlement Country and City Menu Key
- Pension Funding and Schema
- Pension Participation
- <u>Reasons for Temporary Appointment Options</u>
- <u>Shipment Options</u>
- <u>Status ID Menu</u>
- Personal ID Types

Last modified: 1 November 2021

Contract Status

Hover over each option for more information.

• Expert

This indicates the staff member has been recruited for a position that requires

expertise in a particular field. The position is subject to the conditions of service for an expert position.

Geographical

This indicates the staff member has been recruited for a geographical position, which is subject to the system of desirable ranges.

• Language

This indicates the staff member has been recruited from the roster of competitive examinations for posts requiring specific language skills.

Limited

This indicates the staff member's contract is limited to the position or office they have been recruited to encumber.

Other

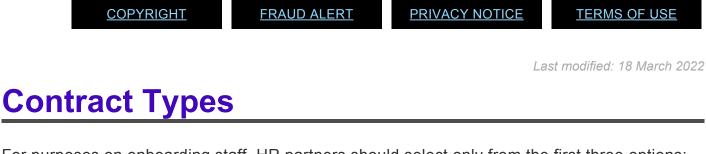
This option should be used for all appointment types that do not fit into another contract status type. This contract status should be used for all General Service staff members (except in the case of a retiree status).

Retiree

This indicates the staff member is a retiree who is receiving a pension from the UNJSPF and therefore is subject to the USD \$22,000 annual earnings limit before they are required to re-join the Pension.

• Retiree – Language

This indicates the staff member is a retiree previously employed in a language position and subject to the 125 day annual limit imposed on retirees for language services.



For purposes on onboarding staff, HR partners should select only from the first three options:

- Continuing: For continuing appointments
- Fixed-term: for fixed-term appointments
- Temporary: for Temporary appointments



Hover over each option for more information.

• EOD UN Common System (U1) ()

Used to record the initial date of appointment (initial date of uninterrupted service/ latest entry date without break in service) with any UN Common System entity.

• EO UN Secretariat(U2) (i)

Used to record the initial date of appointment (initial date of uninterrupted service/ latest entry date without break in service).

• Seniority in Grade (U4)

Used to record the staff member's seniority in grade

• Retirement Date (U5)

Used to record the staff member's retirement date (for all incoming staff member's effective 01.01.2014 this date will be the last day of the month in which they reach age 65).

• U6, U7 and U9

Only to be used exceptionally, when an Override in the date is required to ensure proper calculation of an an entitlement.

• OVR EOD D/S (U6)

Used to amend converted records for mobility purposes.

• OVR Mobility Ef Date (U7)

Used to record the Grant Mobility date if not properly picked up on conversion or if granted by another agency/Fund/Programme in cases of Interagency movements.

• OVR D/S ArvI-Rental (U9)

Used to override the arrival date at the duty stations for rental subsidy purposes. Used for staff serving in a Schema A duty stations who were recruited within commuting distance of the duty station as they had a date of arrival at the duty station prior to taking up the appointment with Organization.

• Pension Particip Dt (U8)

Date populated automatically through the Interface with the UNJSPF that captures the start date of participation in the Fund. This date will be the most recent date of contribution under the current appointment and it is NOT to be maintained by HR Partners.

• Declaration Date (UA)

Used to record the date the staff member signed their Oath of Office.

• Waiver Signed Date (UB)

Used to record when a staff member serving in the US has signed the waiver (I-508, Request for Waiver of Certain Rights, Privileges, Exemptions and Immunities). The signing of the waiver is a prerequisite for tax reimbursements and should be signed by anyone with an immigration status (such as permanent residency) that requires them to pay US taxes.

• ASHI-UNCS EOD (UD)

This date is reserved for use by the Benefits Administrators as it's directly related to After Service Health Insurance.

• AL Accrual (UL)

Date that will be dynamically populated when processing Special Separation. Do not modify or change. The system will delimit the Leave Infotypes upon separation and when processing the Reappointment without a break PA, the clock will be reset here for AL accrual purposes.



If the staff member is a permanent resident of the US, and this date is not recorded, the Tax Unit will not be able to process their tax reimbursements.

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Employee Group Menu

Hover over each option for more information.

International Staff

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Staff members who are entitled to International benefits based on the positions the staff member encumbers (e.g. positions in the Professional and higher categories, FS positions, etc.).

Local Staff

Staff members who are in posts subject to local recruitment as per "staff rule 4.4".

Conf Language Staff

Professional staff members who are being hired temporarily for conference language jobs (translation, interpretation, etc.). Also to be used for WAE language contracts.

• WAE Staff

Staff members who are not performing language functions and are on "When Actually Employed" status and will be paid only for actual days worked.

Special Staff

Used for all tribunal judges, the Chair of ACABQ, the ICSC Chair, the ICSC Vice Chair, \$1 contact staff, and MICT judges.

• R/NR Loan to UN

Staff members who are on reimbursable or non-reimbursable loan from another UN agency.

Admin by UN Agency

Staff member who are hired for Secretariat positions but are administered by other UN agencies (UNDP, etc.).

• Benefits

Used for individuals other than active staff and non-staff who are in receipt of benefits (survival benefit, appendix D, etc.).

External

Individuals who require a mini-master record in the system to allow for travel or for other Organizational reasons (e.g. meeting participants).

• Military/Police

Individuals who are military or police and are on loan from Member State governments. These individuals are paid by the Organization and receive MSA.

Non Staff no Payroll

Individuals who are not staff members but are paid by the Organization (e.g. Consultants and Individual Contractors).

Non Staff on Payroll

Individuals who are not staff members, but are paid on payroll (postal workers).



Hover over each option for more information.

Field Service Officer

Staff members recruited for a Field Service Officer position.

• Field Service

Staff members recruited for a Field Service position.

GS International

Staff members recruited for a General Service position, who are internationally recruited and therefore entitled to international benefits.

• JPO/Associate Expert

Staff members recruited for the Junior Professional Officer / Associate Expert program under bilateral agreements between the UN and Donor Countries for development projects.

Professional & Above

Staff members recruited for Professional and above positions.



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NPO Entitlement Country and City Menu Key

Hover over each option for more information.

• Place of Home Leave:

Used to record the staff member's official place of home leave.

• Place of family visit:

Used to record the staff member's official place of family visit travel.

• Place of Home Country:

Used only in exceptional cases where the staff member has a place of home leave that is different from the home country/ country of nationality. **This is a required field in these circumstances**.

Place of Permanent Residence:

Used to record the place of permanent residence for staff members who were authorised to acquire or maintain Permanent Resident status in another country.

• Place of Recruitment:

Used to record the place from which the Organization recruited and travelled the staff member upon initial appointment or reappointment.

Residence outside of commuting distance:

Obsolete option. **DO NOT USE**

Applicable for Temporary Language Staff Only

• Place of residence – Temp Language:

Used to record the current residence for temporary language staff, which is used to

determine in the case of off-site contracts, if the staff member is entitled to Headquarters or Worldwide rates.

• Place of Professional domicile – Temp Lang:

Used to record the professional domicile for temporary language staff, which is used to determine whether the staff member is entitled to Headquarters or Worldwide rates and if they are being recruited locally or globally.

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Pension Funding and Schema

Fund Details status:

• Contributing:

If the Staff Member has an initial appointment of more than 6 months.

• Non-Contributing

If the Staff Member has an initial appointment of less than 6 months. Validating: Should not be used for Initial Appointment or Reappointment.

Schema menu:

• Standard Schema:

This indicates the Staff Member is part of standard Pension Participation.

• SLWOP Schema:

This indicates that the Staff Member who is on Special Leave without Pay is making full contributions (to cover both the Staff Member's and the organization's contributions) to the Pension Fund. This should NEVER be selected for an Initial Appointment or Reappointment.

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Pension Participation

When changing a staff member's pension contribution status from Non-Contributing to Contributing during the execution of a Temporary Reappointment PA, or establishing the date upon initial appointment, you must pay particular attention to the Start date for the NPO Pension Funds record.

The pension participation date is established or reset as follows:

Pension Participation date

Day 1 of the initial appointment, reappointment or extension, if the initial appointment, reappointment or extension is for a period of 6 months or more.

Example 1: A staff member's initial appointment was for less than six months (01.01.2020 through 31.03.2020). The staff member is not entitled to Pension.

or

The first day of the seventh month if six months of service on a series of appointments of less than 6 months without a break or more than 30 days between appointments have been completed prior to the appointment, reappointment or extension.

Example 2: A staff member has an initial three-month appointment (15.01.2020 – 14.03.2020) followed after a short break by a four-month temporary reappointment (01.04.2020 through 31.07.2020). The staff member starts to contribute to the pension fund effective the first day of the seventh month, which is 01.07.2020 The start date of the infotype defaults to the effective date of the reappointment, 01.04.2020. Leave this as is and select non-contributing because as of the effective date of the appointment the pension participation is non-contributing.

Once you have completed the Onboarding PA:

1. run a PA30 and copy IT0961 (Pension participation).

1. On the copy screen, change the start date of the header to the correct pension participation date (01.07.2020) and select contributing as a pension status.

3. When you validate and save you will see a prompt asking you to delimit the prior record (from 01.04.2020).

4. Click Ok and then save the record.

This will delimit the prior non-contributing record and create the new contributing record effective 01.07.2020.

Pension Funding and Schema



Temporary appointment options are to be chosen between reasons 31 and 60 only as follows:

Hover over each option for more information.

Emerg Surge Natural Disaster

Used for staff members that are recruited for temporary positions created to deal specifically with natural disasters.

Emerg Surge Conflict/Violence

Used for staff members that are recruited for temporary positions created to deal specifically with conflict and violence issues.

Seasonal/peak work requirement

Used for staff members that are recruited for positions created to meet the demands of seasonal/peak work periods of limited duration (e.g. temporary positions created during the General Assembly period).

Replacement on Special Leave

Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Special Leave.

Replacement on Sick Leave

Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Sick Leave.

Replacement on Maternity Leave

Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Maternity Leave.

Replacement on Paternity Leave

Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Paternity Leave.

Replacement on Temp Assign

Used for staff members that are recruited on a position that is currently vacant because the incumbent is on Temporary Assignment.

Temp Appt Pending Selection

Used for staff members that are recruited on a position that is currently vacant and the selection process is underway.

• Special Project Finite Mandate

Used to recruit staff members to work on a project with a finite mandate and a duration of less than one year.

Temp Conf Language Staff

Used for language staff members that are recruited temporarily on a language position.

WAE Conf Language Staff

Used for language staff members that are recruited on a language position but will be paid on a When-Actually-Employed basis.

WAE non-Language Staff

Used for staff members that are recruited on a non-language position and that will be paid on a When-Actually-Employed basis.

• Others

Used for other reasons not covered under any of the options above.



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Shipment Options

Hover over each option for more information.

Shipment Menu Options

Full Removal

used when there is a complete removal of household goods.

Unaccompanied Shipment (Assign/Contract >= 1Yr)

used when the staff member opted for unaccompanied shipments for assignments or contracts for one year or longer.

Unaccompanied Shipment (Assign/Contract < 1Yr)

used when the staff member opted for unaccompanied shipments for assignments or contracts for less than one year.

Unaccompanied Shipment for JPO

used if the staff member is a Junior Professional Officer (JPO) and has opted for unaccompanied shipment.

Unaccompanied Shipment – Return From Assignment

used when the staff member is returning to their original duty station and has opted for unaccompanied shipment.

Shipment details Menu Options for Unaccompanied Shipment (Assign/Contract < 1Yr)

Unacc shipment : 1000 kg for s/m only

used if the staff member opted to have their personal effects shipped up to a maximum weight of 1000 kg.

Unacc shipment : 1000kg / 300kg / 500kg

used if the staff member with eligible family members opted to have their personal effects shipped up to a maximum weight of 1000kg for the staff member himself, 500 kg for the first eligible family member and 300 kg for each additional eligible dependent.

• RLG : \$15,000 – Single rate

used if the staff member with no eligible family member opted to receive relocation grant (RLG) of US\$10,000 to cover the expenses of the move.

• RLG : \$18,000 @ Dependent rate

used if the staff member with eligible family members, provided that at least one eligible family member travels to the duty station at the United Nations expense, opted to receive a relocation grant (RLG) of US\$15,000 in lieu of the unaccompanied shipment.

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Status ID Menu

Hover over each option for more information.

CRB recruitment

The staff member's recruitment has been approved by the CR Bodies and they have successfully completed the required reference checks.

• GS & Rel Recruitment Exam

This indicates the staff member has successfully passed any exams associated with their category prior to employment.

• YPP

This indicates the staff member was successful in the Young Professionals Program exam and has been recruited by the Organization as part of the program. This option will also be used for successful G to P/ G to N staff members who are successful in the YPP exam.

• NCRE (prior 2011)

This indicates the staff member was successful in the National Competitive Recruitment Examination and is being promoted from the General Service and related categories to the Professional category.

• G to P (prior 2011)

This indicates the staff member was successful in the National Competitive Recruitment Examination (now the YPP exam) and has been recruited by the Organization as part of the former program.

• G to N (prior 2011)

This indicates the staff member was successful in the National Competitive

Recruitment Examination and is being promoted from the General Service and related categories to the Professional category.

• Prof Lang Comp Exam

This indicates the staff member was successful in the Organization's Language Professional examination and has been recruited by the Organization. This option will also be used for current GS and related staff members who have passed a Language Professional Examination.

Top Echelon Appointment

This indicates the staff member has been recruited by the Organization to serve in a top echelon position (e.g. Under Secretary General).

• GS Competitive Exam

This indicates the staff member was successful in a GS Competitive Examination (e.g. Statistical Assistant exam, Accounting Assistant exam, etc.) and is being recruited or promoted by the Organization for a position at the G-6 level or above in a specialized area.

• Prof Lang Coord Exam

This indicated that the staff member was successful in a competitive examination for language coordinator and is being recruited to this professional position.

Asso Tran. Support Exam

Used for Associate Translator examination. DO NOT use as it only appears in records transferred from the legacy system, IMIS.

• Lang Teacher Exam:

This indicates the staff member was successful in the Organization's Language

Teacher Exam and is being recruited by the Organization to server as a Language Teacher.

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Personal ID Types

Subtypes for IT0185 (Personal IDs)

• G4 Visa

This personal ID is required by International staff members working in the United States. It is a non-immigrant visa, which allows foreign officers and employees of an international organization to perform duties that related to the international organization. This should be used to record the visa information of the staff member.

G5 Visa

This personal ID is required for domestic employees who are accompanying an employer (G4 Visa holder) while they are on assignment in the United States. A domestic employee is generally a member of the household staff, such as a cook, butler, chauffeur, housemaid, nanny, or gardener. This should be used to record the visa information of the staff member's domestic employee(s), if applicable.

Perm Resident

This personal ID must be recorded if the staff member holds Permanent Residence status in a country other than their home country. If the staff member is a Permanent Resident of the United States, the HR Partner should ensure that their information is

recorded in IT0185 and that they have signed the waiver (the waiver date should have been recorded in IT0041 (Date Specifications).

B1 Visa

This visa is issued to individuals who plan to perform some business related activities within the United States for a limited time (up to 6 months).

• B2 Visa

This visa is known as a visitor visa and is issued to individuals who wish to enter the United States for non-business purposes. It is a non-immigrant visa, which allows foreign nationals to enter the United States for tourism/visitation purposes. This should be used to record the visa information of the staff member's eligible dependents, if applicable.

• U.S. Work Permit

This document is issued to foreign nationals living in the United States who have received explicit permission to work in the United States.

• Non U.S. Official d/s Visa

This Non U.S. visa may be required by some International staff members working in countries other than their home country or the US upon initial appointment, reappointment, reassignment, or temporary assignment. This should be used to record the visa information of the staff member and any eligible dependents.

DtyStation Residency Card

A residency Card may be required for some International staff members working in countries other than their home country upon initial appointment, reappointment, reassignment, or temporary assignment.

Carte de Legitimation

This personal ID is a permanent residency card issued by the Swiss Federal Department of Foreign Affairs (DFAE) for staff members and eligible dependents in Geneva.

Passport 1

This personal ID should be used to record the staff member's passport information. Kindly note the HR Partner should only record this information once the passport has been verified from original.

• Passport 2

This personal ID should be used to record the staff member's second passport information. In some exceptional instances staff members may have two valid passports.

Drivers Licence

This personal ID should be used to record the staff member's driver's licence. For all staff members who operate vehicles as part of their official duties, this personal ID should be entered. Additionally, for local staff members who do not have as valid passport, a driver's licence can serve as a valid form of ID.

• Laissez-passer (LP1, LP2, LP3, LP4)

This personal ID is the laissez-passer and is issued by the Organization to be used for official travel purposes. This valid travel document can be used like a national passport.

In certain circumstances a staff member will travel to certain countries that will not allow the staff member entry if proof that the staff member has been to other particular countries is found (i.e. passport stamp). As such the staff member may be allowed to hold two laissez-passers to avoid being refused entry into a country for official business purposes.

When a staff member who holds two laissez-passers is in the process of renewing their LPs they may be issued newer LPs without the cancellation of the expiring LPs. In this case the staff member may have up to four valid LPs.

Birth Certificate

This personal ID is used to record the birth certificate information of a staff member. Kindly note the HR Partner should only record this information once the birth certificate has been verified from the original.

Marriage Certificate

This personal ID is used to record the marriage certificate information of a staff member. Kindly note the HR Partner should only record this information once the marriage certificate has been verified from original.

• UN Grounds Pass

This personal ID is used to record the staff member's grounds pass information.

Travel Document

This personal ID is an identity document issued by a government or international

treaty organization to facilitate the movement of individuals or small groups of persons across international boundaries (for instance, a refugee travel document for those who are refugees or asylees).

• ID Ministry of Foreign Affairs

This personal ID may be used to record the personal ID issued by the Ministry of Foreign Affairs in the home country of the staff member.

• U.S. PID#

This personal ID is a number issued by the United States Department of State after the staff member has been registered by the Travel and Transportation Section.

Tax Identification Number

This personal ID should be recorded if the staff member is entitled to tax reimbursement by the Organization. An example of this ID is the social security number of a U.S. citizen

In addition the tax ID is required to make bank deposits into accounts held in the following countries.• Argentina

- Brazil
- Venezuela
- Colombia
- Chile

The Tax Identification Number (TIN) syncs with the BP record of the staff member for those countries listed.



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15.12. Umoja OM Overview

"Umoja OM Overview"





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