ESS/MSS job aides

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Purpose

In Umoja you will always be required to mark absence from the office through the Employee self service and you will not normally be required to mark your attendance. However when you work outside normal work hours, use flexible work arrangements or have a contract that only calls on your services certain days (such as a WAE contract) you will be required to submit your attendance in ESS.

As there will be no record that you worked those hours or days unless you enter the attendance information in the system, you are advised to be diligent about keeping an accurate attendance record as otherwise it may have an impact on our pay.

Use this procedure to submit requests to record the following attendance types:

- Telecommuting - use to record telecommuting hours/days.
- Overtime (1.5 and 2.0) - use to record overtime hours worked with a 1.5 or 2.0 payment factor, respectively.
- Standby/Oncall - use to record hours spent on Stanby or Oncall.
- CTO Accrual - use to create the CTO quota which can be used later by the CTO absence entry.
- Attendance (Compressed) - This is used to record the "extra" hours that the staff member works on a compressed work schedule. It generates a quota called compressed regular day off which can be used by entering absence type Compressed regular day off (on the 10th day of a 9 in 10 compressed work week). If the quota is not enough, meaning the staff member has not recorded enough "extra" hours for the 10th day, it will not allow the absence to be recorded.
- Attendance When Actually Employed (WAE) - This is used for WAE entries and has to be entered for every day that the WAE staff will be paid (you can use a date range for this entry). Note that the staff member needs to be in the 7DAYWAE work schedule in order for all entries to be paid regardless if it is a weekend.
- Daily Cnf Lng Addl Days (Daily Conference Language Additional Days) - This is for conference language staff (daily) that work during the weekends. Normally, the conference language staff is paid based on a 5 day/week schedule but if the staff works on the weekends, this entry needs to be made to allow additional payment.
- Official Business - use to record hours/days when the staff member is on official business.

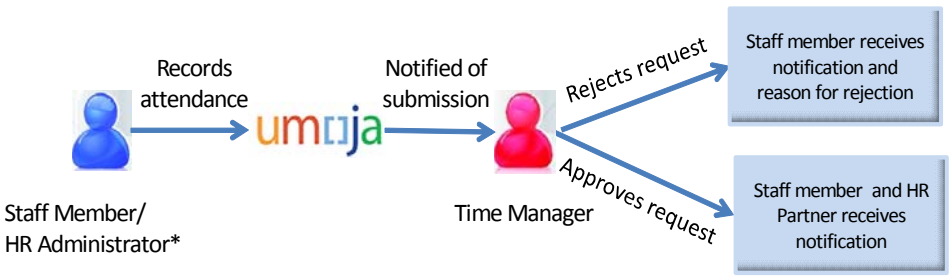
Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.

S



*** HR Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**

1. ***Staff Member*** receives approval offline from the manager to work for certain days/hours.
2. ***Staff Member*** records hours worked leave through the Umoja Employee Self-Service portal.
3. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** approves the request, the request is recorded in ECC and a notification is sent to the ***staff member.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Objectives

As part of the demonstration, we will show you:

1. How to record the days/hours you have worked.
2. How to ensure your secondary time manager(s) receive notification of your request.
3. How to check the status of your request.

Scenario

A ***staff member*** worked 4 hours of CTO on 7 April 2015 and is recording the hours accrued.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

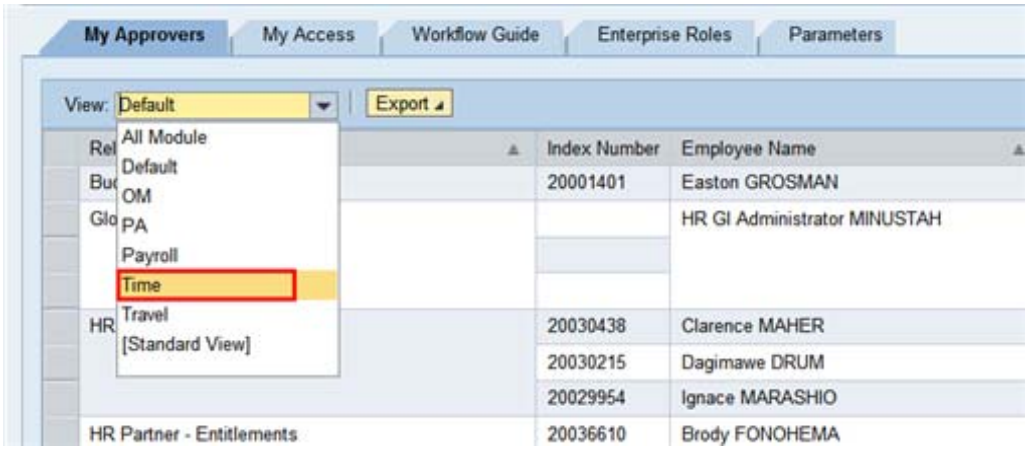
Before we submit a leave request, we will be showing you how to check the time managers and time administrators assigned to you. Every staff member is assigned a primary time manager who is responsible for approving your time related requests. Your primary time manager can delegate the role of time approver to one or more secondary time managers.

Welcome to Umoja



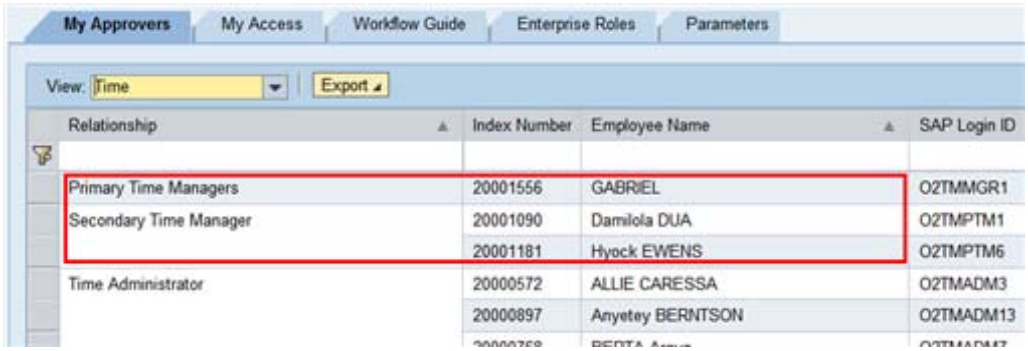
1. Click on the User Map link.

User or Employee Search



2. All managers and administrators assigned to you are listed in the My Approvers table, to view the managers and administrators associated with time, select Time from the View drop-down menu.

User or Employee Search



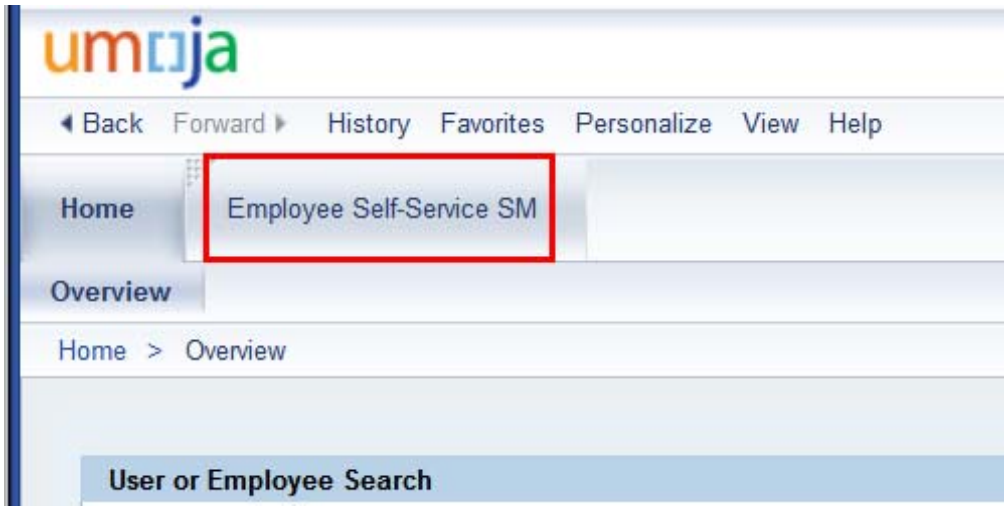
3. The Time Manager(s) and Administrators are listed. Your primary manager is GABRIEL who has assigned two secondary time managers.

Next, we will be demonstrating how to record CTO Accrual.

4. Start the transaction using the menu path:

Employee Self-Service SM>Time Management>Create Leave Request

User Map - Umoja qa portal - Q3J - Windows Internet Explorer



5. Click on the Employee Self-Service SM tab.

Employee Services



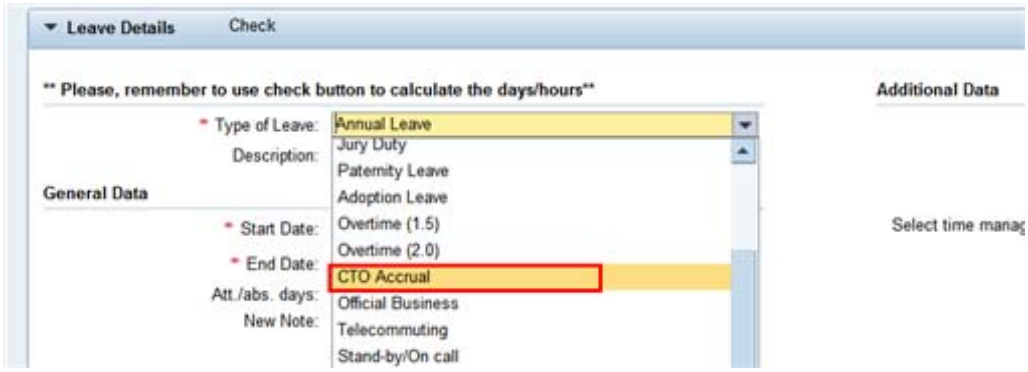
6. Click on the **Time Management** link.

Time Management



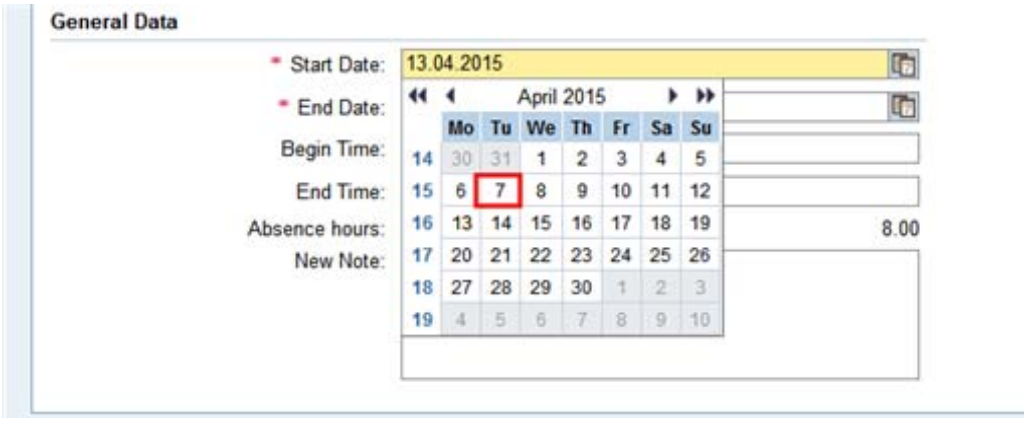
7. Click on the Create Leave Request link.

Humam EVERY - Leave Request: New



8. Select CTO Accrual from the list of leave types.

Humam EVERY - Leave Request: CTO Accrual, 13.04.2015

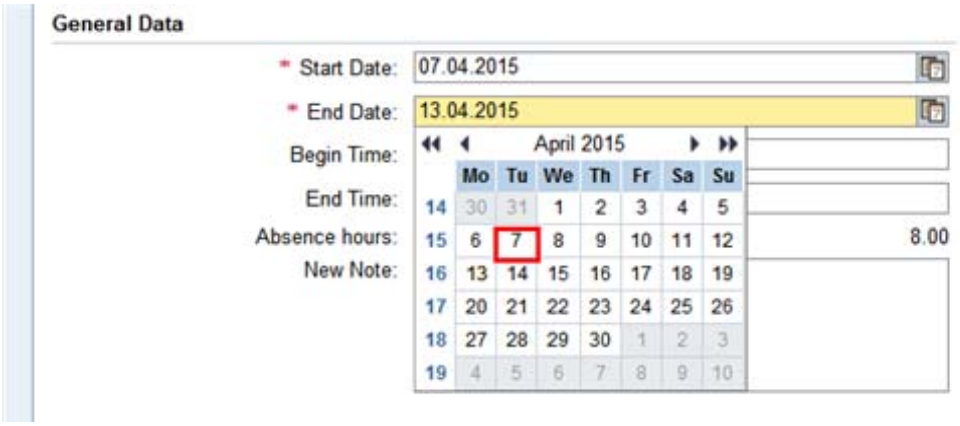


9. Select the date you worked CTO. Dates can be selected from the calendar by clicking on the Calendar icon or entered directly into the field using the DD.MM.YYYY format. In this case, select 7 April from the calendar.

Remember, you can only record days/hours that you have already worked and have been approved by your manager offline, you can not record future hours yet to be completed.

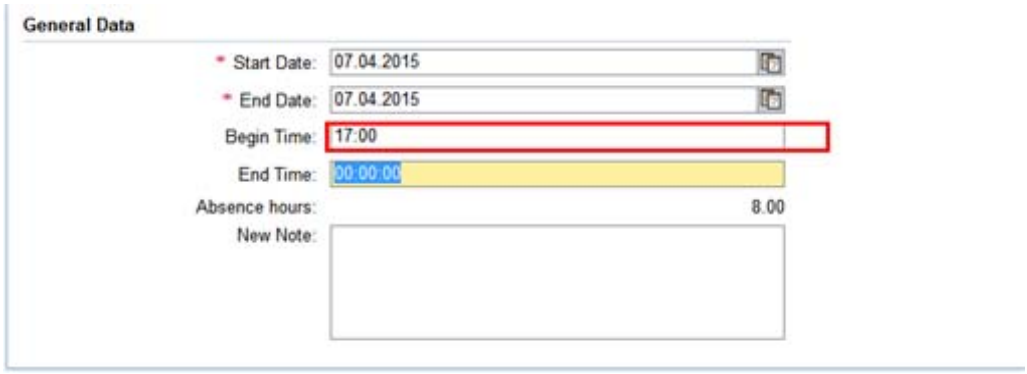
Also, each day of CTO completed must be entered separately, for example if you accrued 4 hrs of CTO on 7 April and 4 hrs on 8 April, these must be recorded separately.

Humam EVERY - Leave Request: CTO Accrual, 13.04.2015



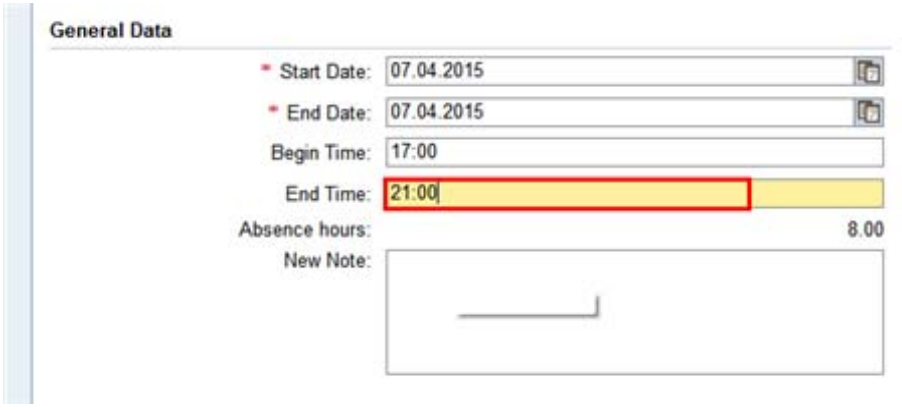
10. Select or enter the date you completed CTO. In this demonstration we entered the end date of 7 April.

Humam EVERY - Leave Request: CTO Accrual, 13.04.2015



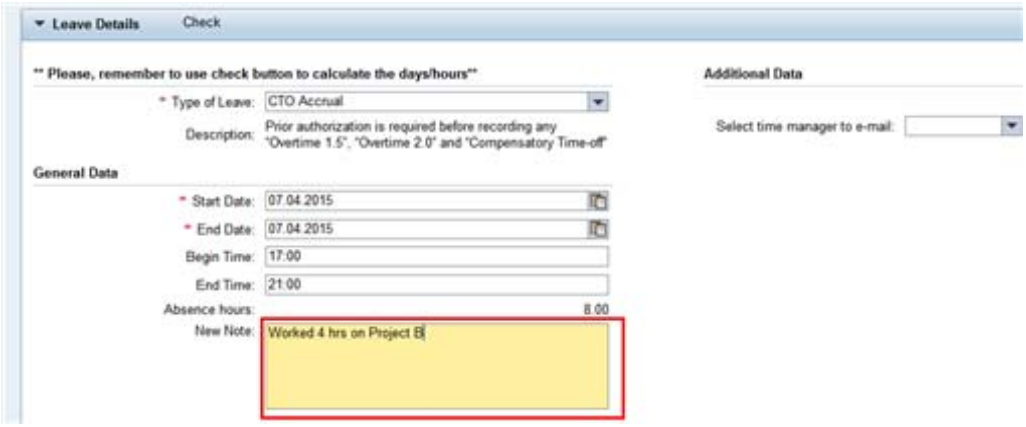
11. Enter the time you started working the CTO hours using the HH:MM:SS format in military (24hr clock) time. In this demonstration, 17:00 (5 PM) was entered.

Humam EVERY - Leave Request: CTO Accrual, 13:04.2015



12. Enter the time you ended working the CTO hours using the HH:MM:SS format in military (24hr clock) time. In this demonstration, 21:00 (9 PM) was entered.

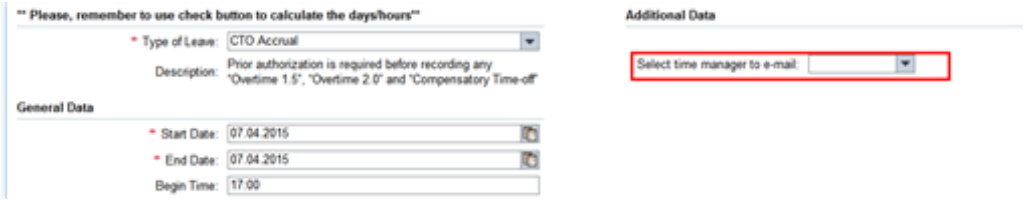
Humam EVERY - Leave Request: CTO Accrual, 13.04.2015



13. You may add remarks or comments in the New Note box, for example we added "Worked 4 hrs on Project B".

Next, we will select the time manager(s) who should receive your request.

Humam EVERY - Leave Request: CTO Accrual, 13.04.2015

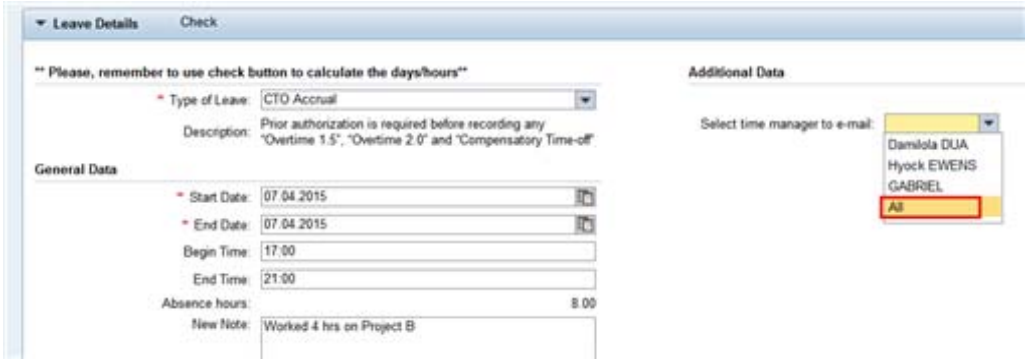


14. Click on the drop-down arrow to view a list of your primary and secondary time managers. The list may be blank if your primary manager has not delegated this responsibility.

Your primary time manager will automatically receive notification of your leave request even if s/he has delegated the time approval function to a secondary manager.

If they have delegated the time responsibility to a secondary time manager, your secondary manager will not be notified of the request unless they are selected from the list of time managers.

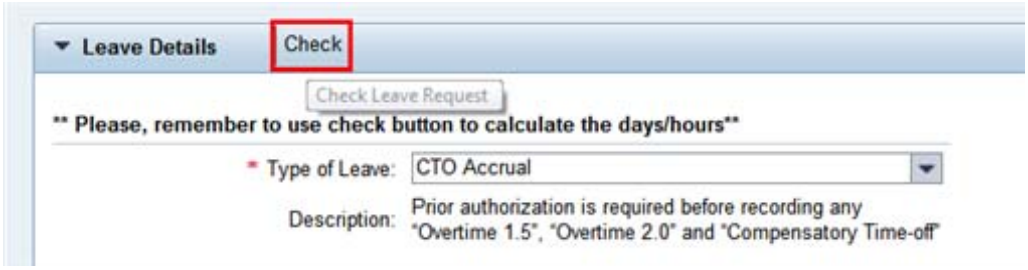
Humam EVERY - Leave Request: CTO Accrual, 13.04.2015



15. Select your secondary time manager from the list of managers who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

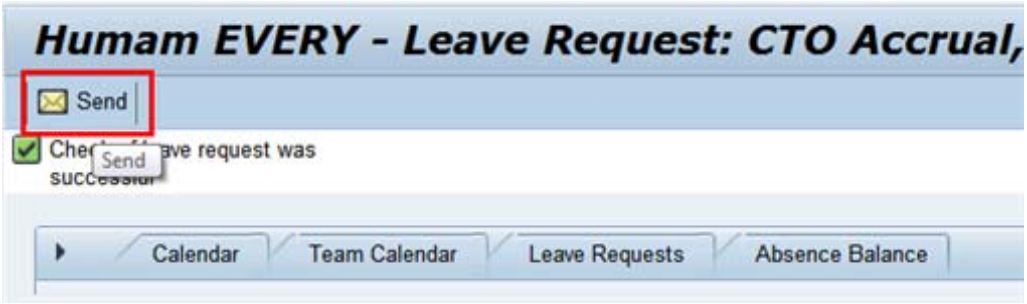
Next, we are going to have the system check your request against any other requests you have submitted.

Humam EVERY - Leave Request: CTO Accrual, 13.04.2015



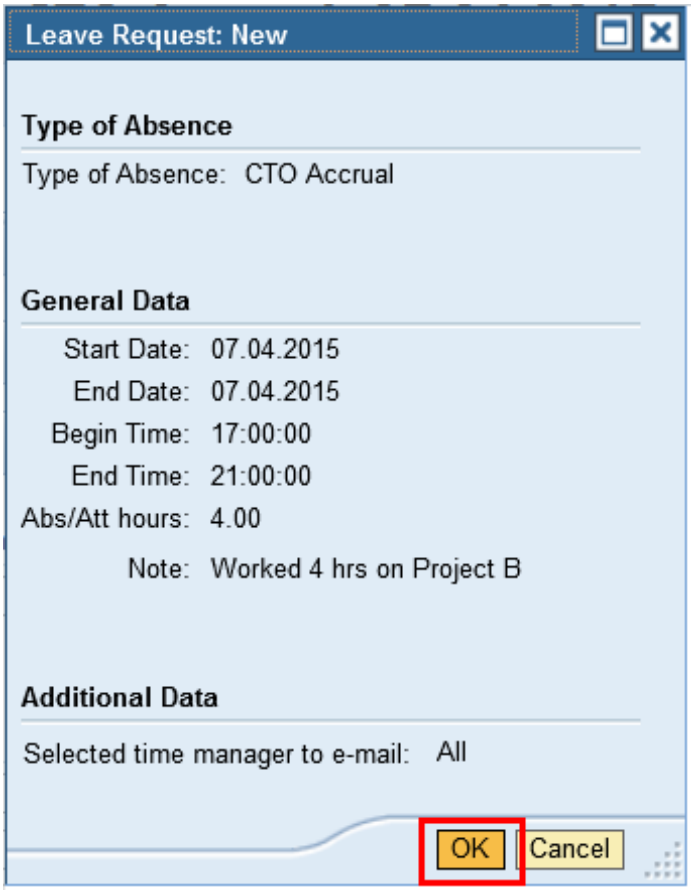
16. Click on the Check button. This will check your request against any other requests you have submitted to ensure there are no conflicts.

Humam EVERY - Leave Request: CTO Accrual, 07.04.2015



17. Click on the Send button. You will be asked to verify the information you entered for the request.

Leave Request: New



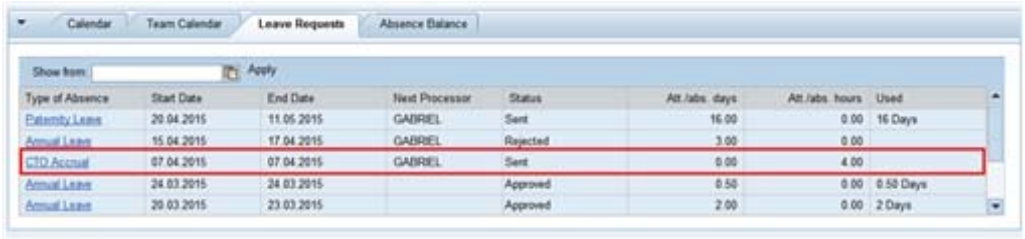
18. Verify the information (dates, note, calculation of used dates and managers who will be notified) and click on the OK button. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

Humam EVERY - Leave Request: New



19. Your request will be sent to your primary time manager and any secondary time manager you selected earlier. Next, click on the Leave Requests tab.

Humam EVERY - Leave Request: New



20. Your request has been sent to your time manager and is shown in the Leave Requests as sent. The status will change when approved. Your Primary time manager will appear in the table but the request will also be sent to any secondary manager you selected in the steps above.

Purpose

Use this procedure to submit requests for the following leave absences:

- Annual Leave - used to record annual leave. The leave amount can be taken at any time provided sufficient time has been accrued by the staff member.
- Annual Leave - Reverse EGT - used to record annual leave due to reverse EGT which is drawn against the staff members annual leave quota.
- Annual Leave - Home Leave - used to record annual leave due to home leave. It is drawn against the staff members annual leave quota and reduces home leave points by 24.
- Annual Leave - Family Visit - used to record annual leave due to family visit and is drawn against the staff members annual leave quota.
- CTO Use - used to record Compensatory Time-Off (CTO) leave and is drawn against the number of pre-approved CTO hours earned by the staff member.
- Compressed Reg Day Off - used to record the 10th day of a 9 in 10 compressed work schedule

Intended Audience

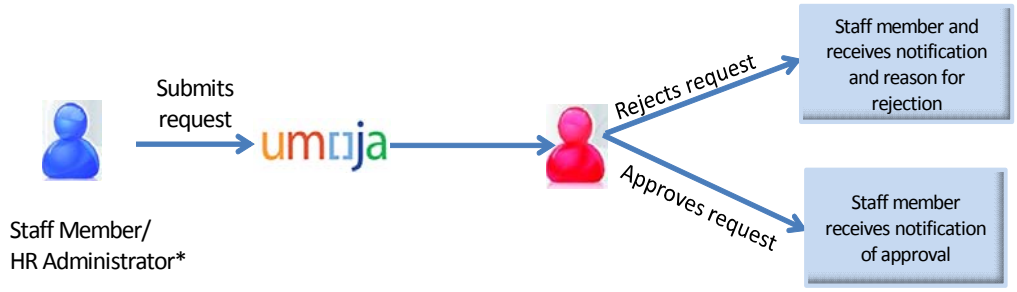
- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.

Below is a description of the types of leaves covered by this procedure and their approval requirements.

S



*** HR Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**

1. ***Staff member*** submits a request for leave through the Umoja Employee Self-Service portal.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** approves the request, the request is recorded in Umoja and a notification is sent to the ***staff member.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Types of leaves requiring single level approval

The following types of leave require approval only from the Time Manager:

- Annual Leave
- Annual Leave - Reverse EGT
- Annual Leave - Home Leave T
- Annual Leave - Family Visit
- CTO Use
- Compressed Reg Day Off

Travel

Some leave requests once approved require the staff member to submit a request for travel entitlements. Leaves that have travel entitlements associated with them are:

- Annual Leave - Home Leave
- Annual Leave - Family Visit
- Annual Leave - Reverse EGT

It is the staff members responsibility to submit the travel request once their leave request has been approved.

Once the travel request has been submitted the HR and Travel teams will review the request for eligibility of entitlement.

Objectives

As part of the demonstration, we will show you:

1. How to check your leave balances.
2. How to check your colleagues approved leave requests.
3. How to submit a leave request for full and half days.
4. How to ensure your secondary time manager(s) receive notification of your request.
5. How to check the status of your request.
6. How to check your new leave balances, after your request has been approved.

Scenario

A ***staff member*** submits a request for two and a half (2.5) days of annual leave starting on 20 March and ending on 23 March with a half day taken on 24 March.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

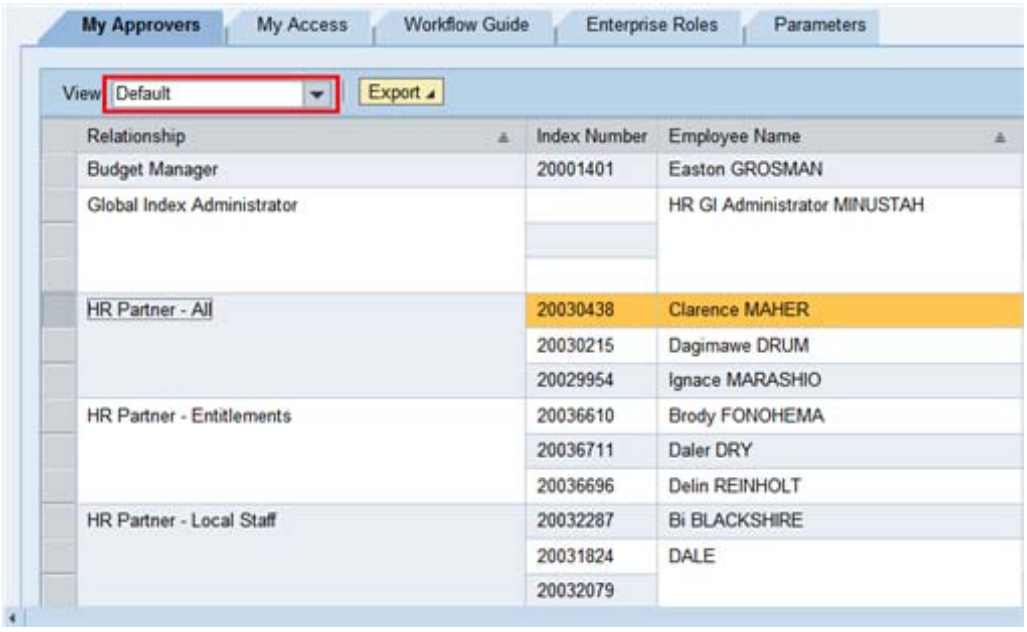
Before we submit a leave request, we will be showing you how to check the time managers and time administrators assigned to you. Every staff manager is assigned a primary time manager who is responsible for approving your time related requests. Your primary time manager can delegate the role of time approver to one or more secondary time managers.

Welcome to Umoja



1. To find out who are your assigned Time Manager(s) and Time Administrator(s) click on the User Map link.

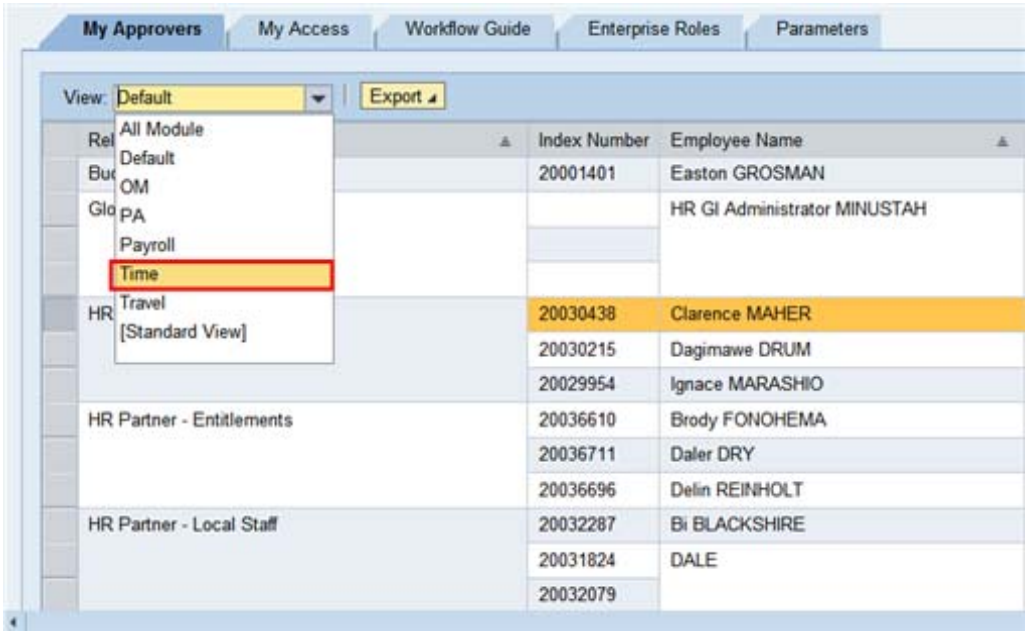
User or Employee Search



2. All managers and administrators assigned to you are listed in the table. To filter the list by the type of processed handled, click on the View drop-down arrow 

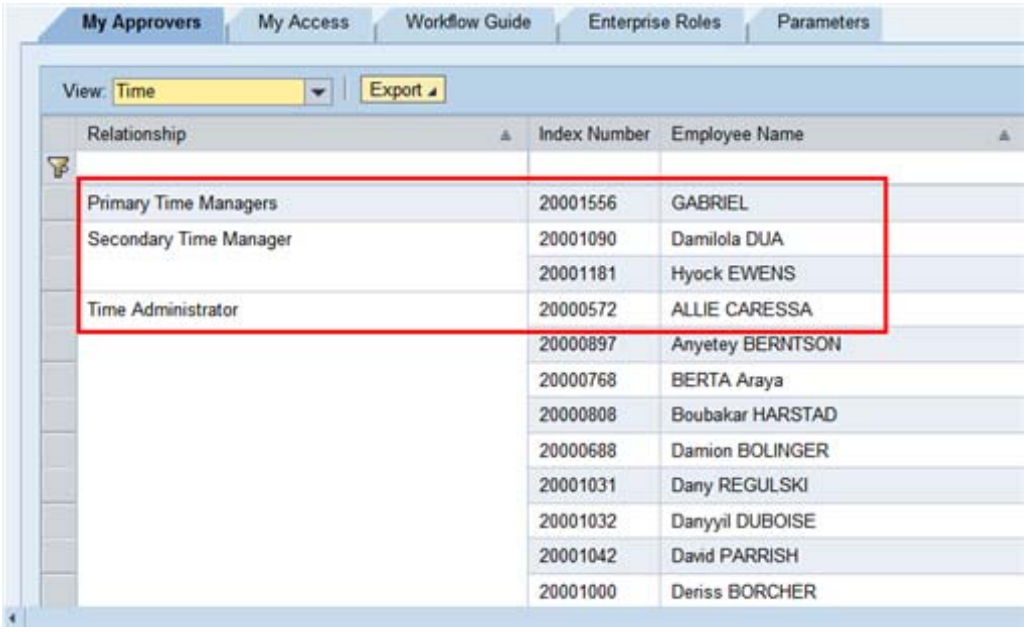
.

User or Employee Search



3. Select Time from the list to filter by the time manager(s) and time administrator(s) assigned to you.

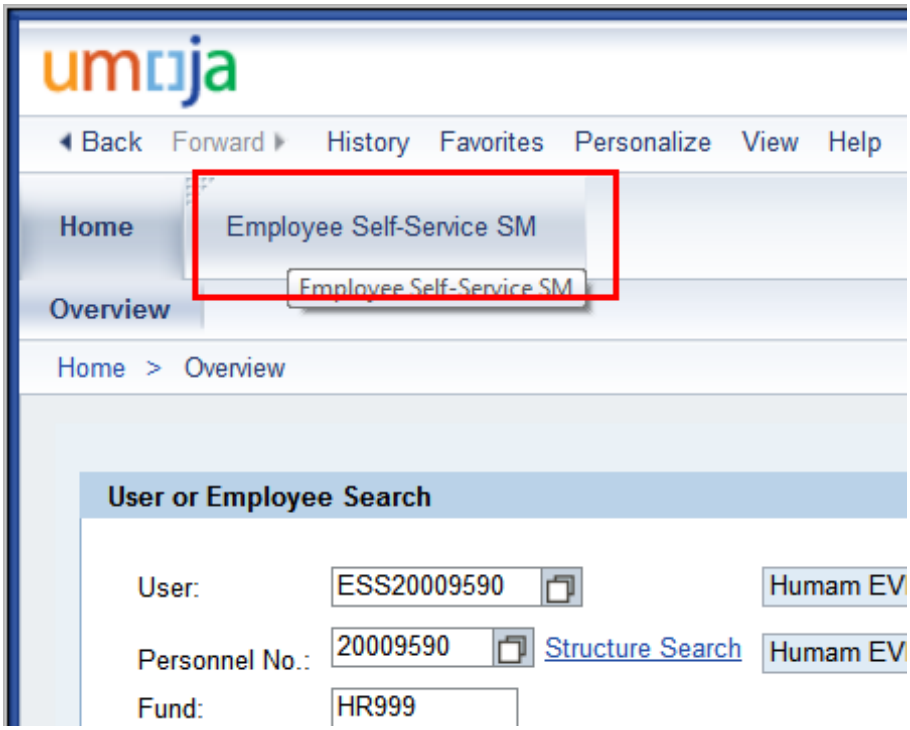
User or Employee Search



4. The Time Manager(s) and Administrators are listed. Your primary manager is GABRIEL who has assigned two secondary time managers.

Next, we will be demonstrating how to create annual leave for 2-1/2 days. It is important to remember that leave requests taken consecutively in days/half days or non-consecutively must be entered separately. First we will demonstrate how to enter the consecutive full days of leave.

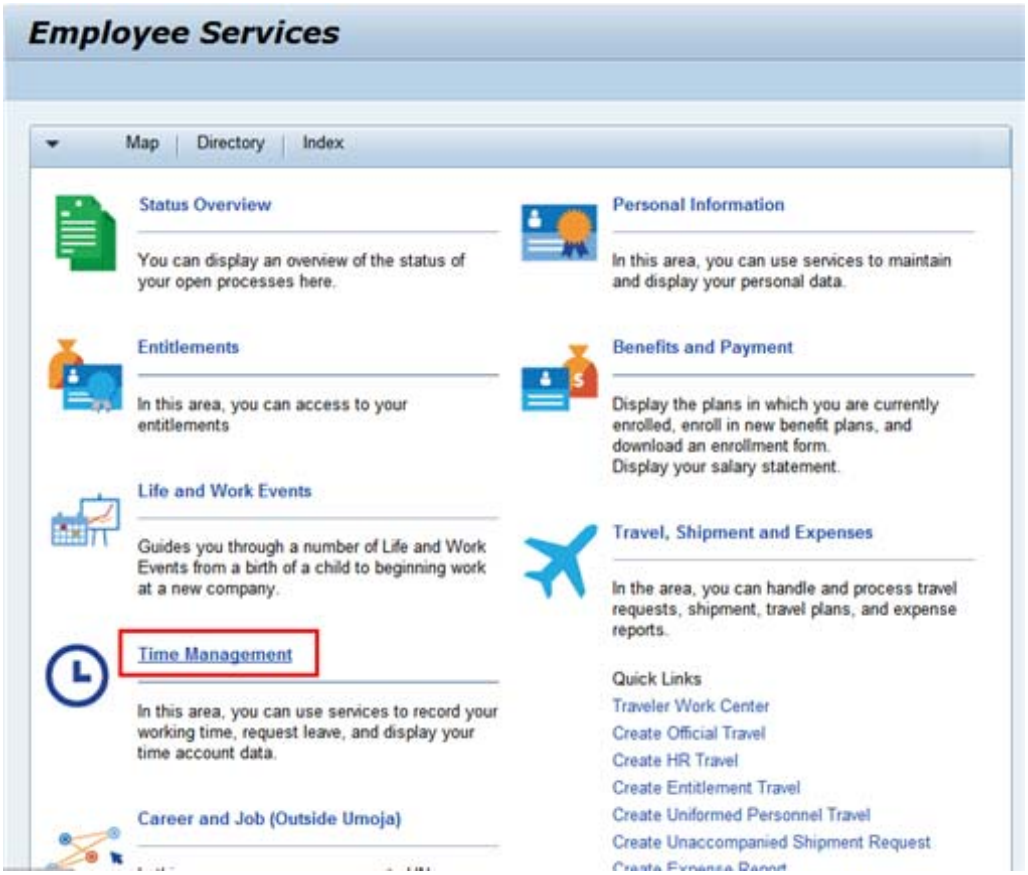
User Map - Umoja qa portal - Q3J - Windows Internet Explorer



5.

Click on the  tab.

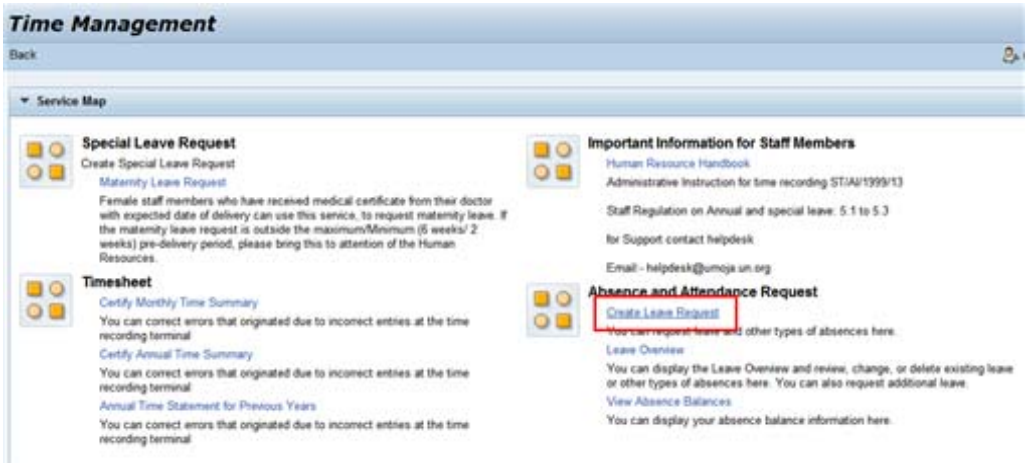
Employee Services



6.

Click on the **Time Management** link.

Time Management

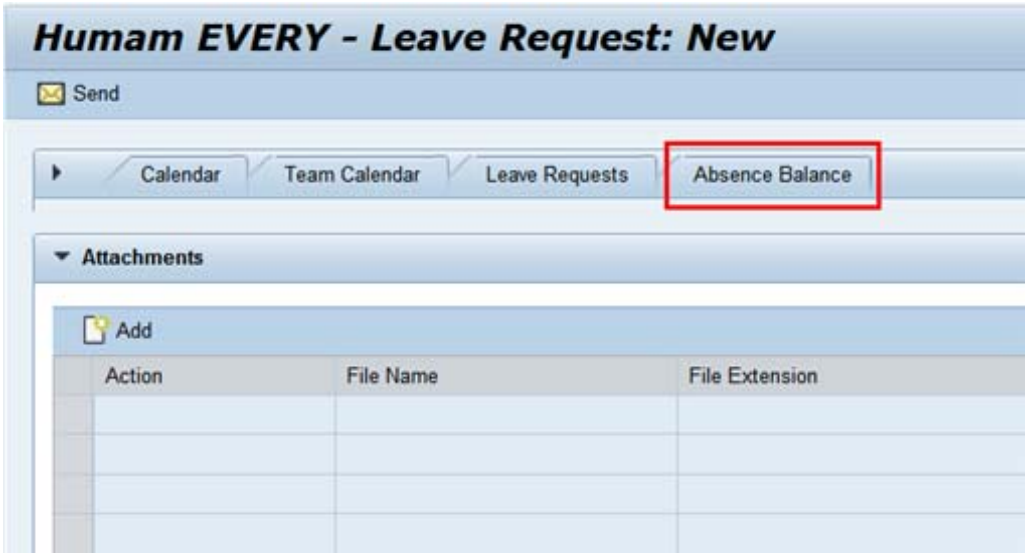


7.

Click on the Create Leave Request link.

The Create Leave Request allows you to submit requests for various types of leaves.

Humam EVERY - Leave Request: New



8. Click on the Absence Balance tab.

Most leave types have a quota (maximum amount of time) that can be taken as leave. You are advised to check your total balance at the time of the request so that you know how much time you can request.

Humam EVERY - Leave Request: New



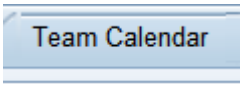
9. Your available balances for the various leave absences that have quotas will be displayed in the Available Balance column.

Next, we will check the Team Calendar. It is important to check this calendar before submitting a request since your manager may not approve your leave request if there are a large number of colleagues absent on the days you want to go on leave.

Humam EVERY - Leave Request: New

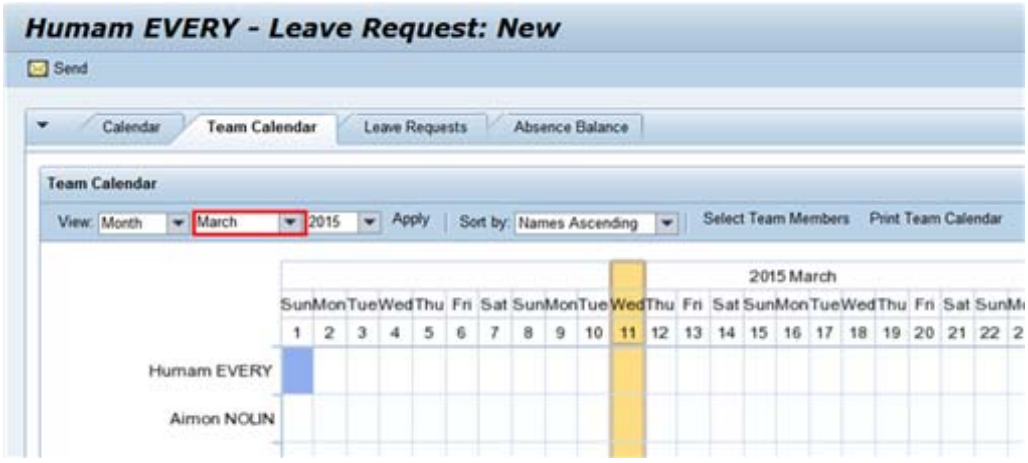


10.

Click on the 

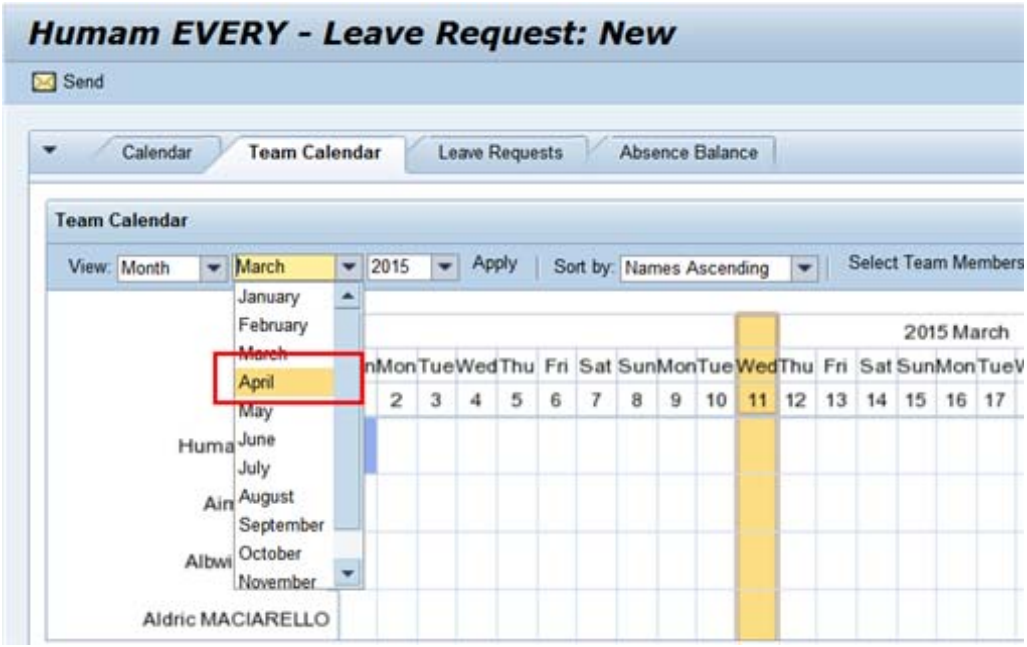
tab. The Team Calendar will display the current month's absences for each member of your team.

Humam EVERY - Leave Request: New



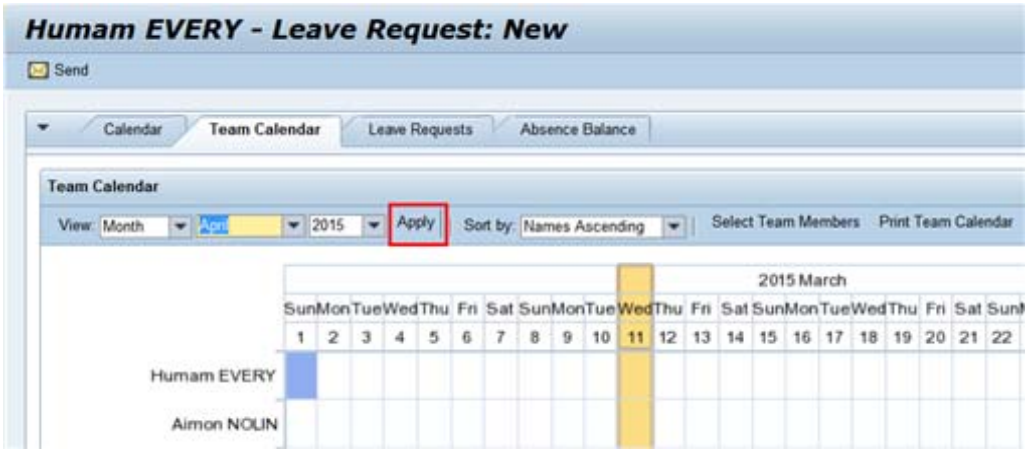
11. To view the team member's absences for a different month click on the drop-down arrow March .

Humam EVERY - Leave Request: New



12. Select the month you wish to view. In our demonstration we will view the team's absences for the month of April.

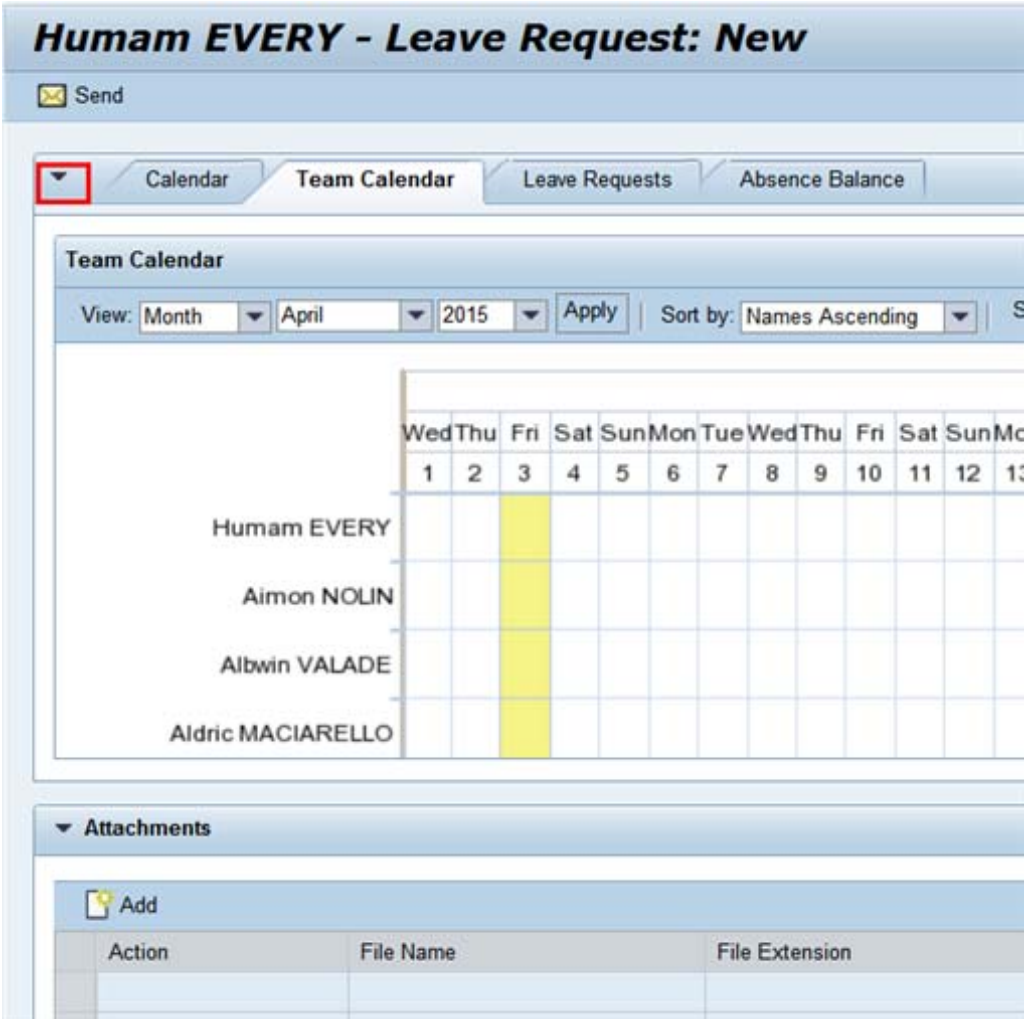
Humam EVERY - Leave Request: New



13.

Click on the Apply button to display the team member's absence for the selected month.

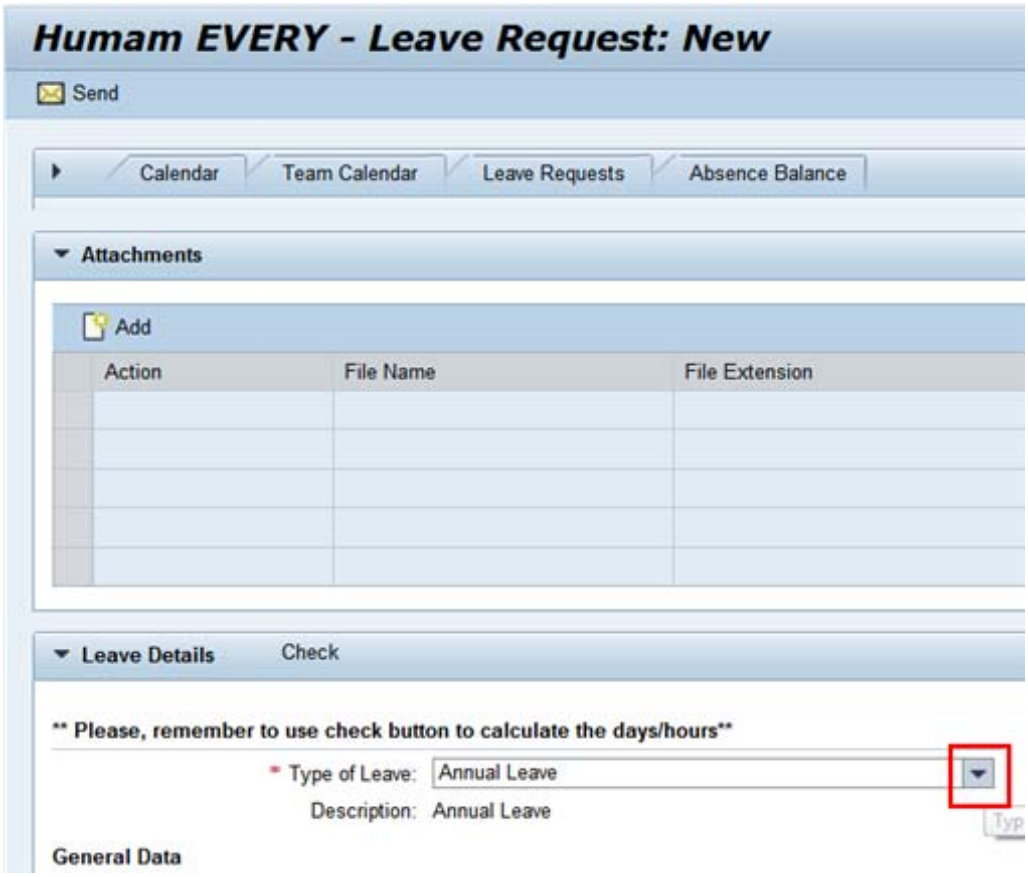
Humam EVERY - Leave Request: New



14. Now that you have checked your absence balances and the team's absence schedule we are ready to create our request.

Click on the drop-down arrow to close this section.

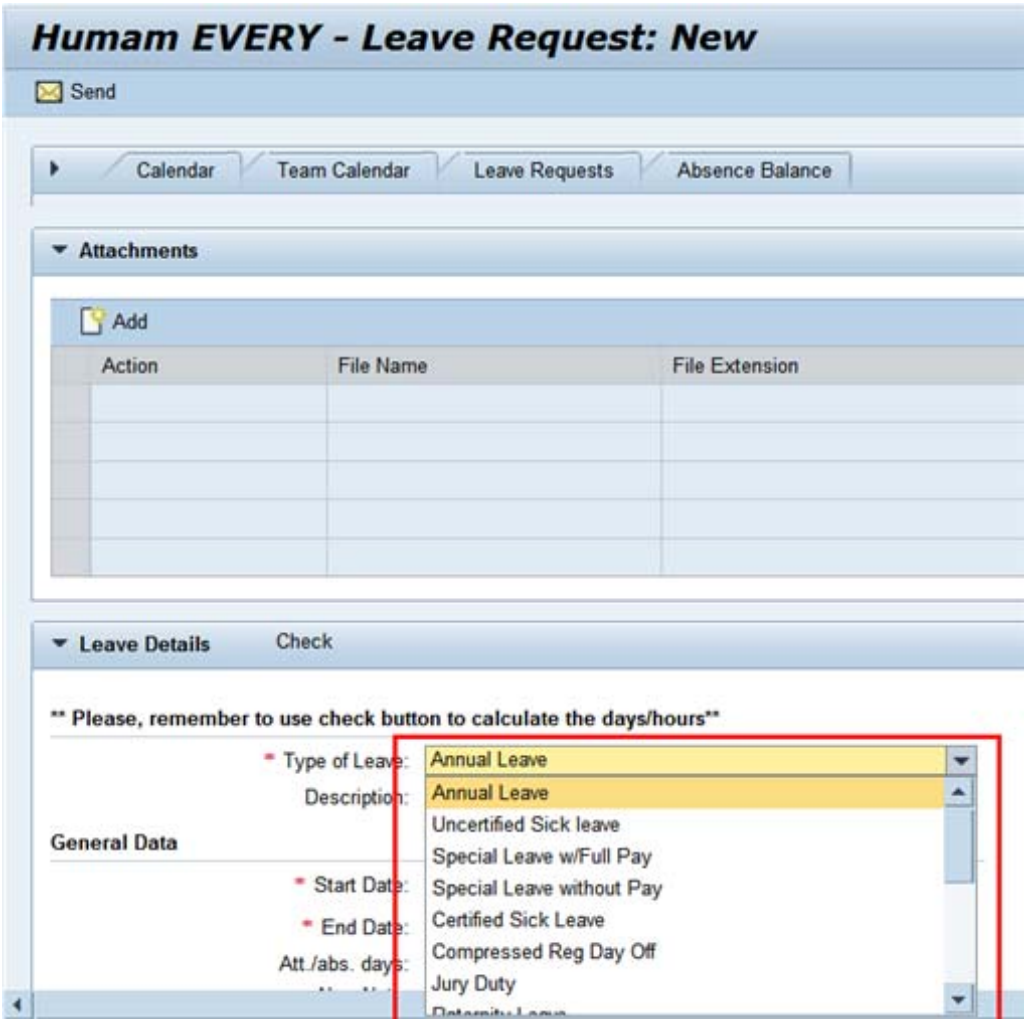
Humam EVERY - Leave Request: New



15.

Click on the drop-down arrow  to view the of leave types available.

Humam EVERY - Leave Request: New



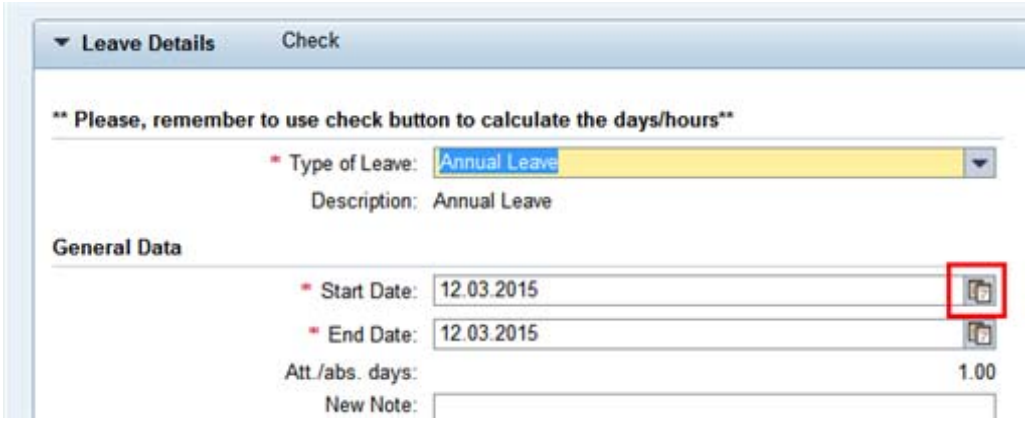
16. Select Annual Leave from the list.

The following steps can be used to request the following leave absence types:

- Annual Leave
- Annual Leave - Home Leave
- Annual Leave - Family Leave
- Annual Leave - Reverse EGT
- Compressed Reg Day Off

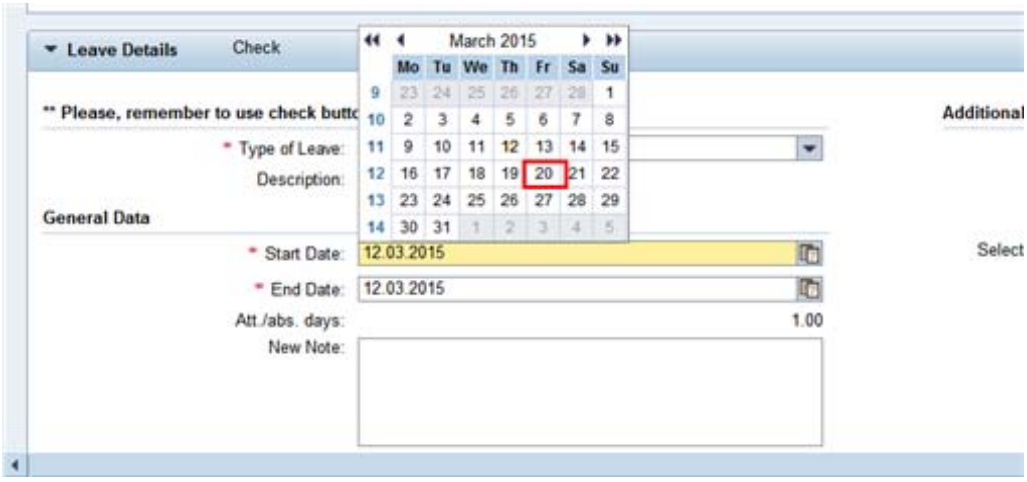
In our demonstration we will be requesting annual leave for 2 -1/2 days

Humam EVERY - Leave Request: New



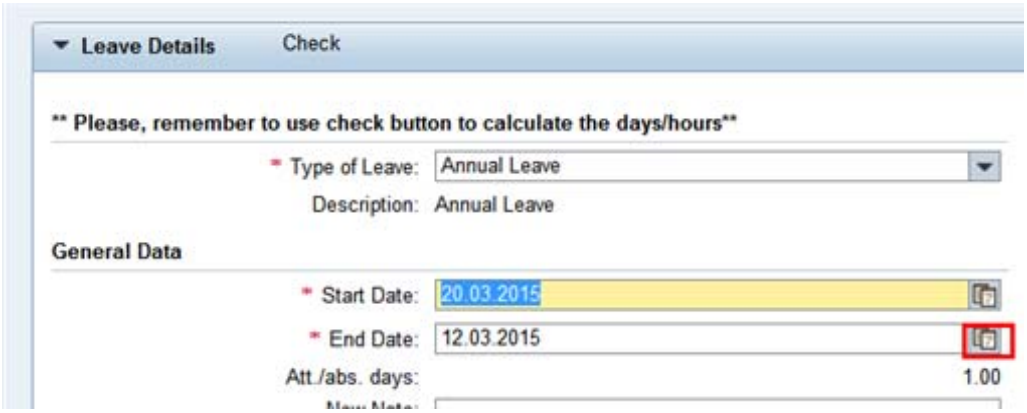
17. Select the date the leave is to start. Dates can be selected from the calendar by clicking on the Calendar  icon or entered directly into the field using the DD.MM.YYYY format.

Humam EVERY - Leave Request: New



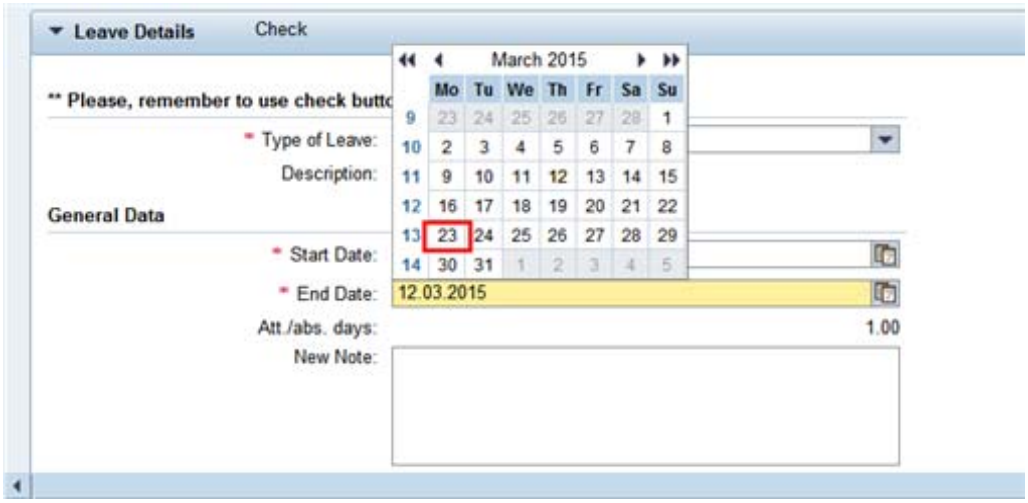
18. On the calendar, select the absence start date. In this demonstration the start date will be 20 March 2015.

Humam EVERY - Leave Request: New



19. Select the date the leave is to end. Dates can be selected from the calendar by clicking on the Calendar icon or entered directly into the field using the DD.MM.YYYY format.

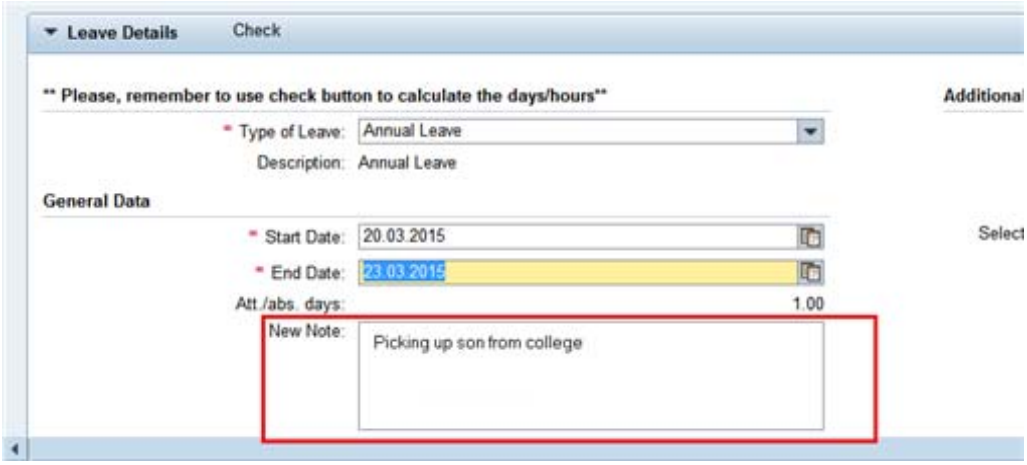
Humam EVERY - Leave Request: New



20. In our demonstration, we will be taking 2 days of absence, from 20 March 2015 to 23 March 2015 inclusive.

The system will ignore Saturday, Sundays and Holidays. If one of those days were selected a message will appear instructing you to choose another start or end date to calculate the days of absence.

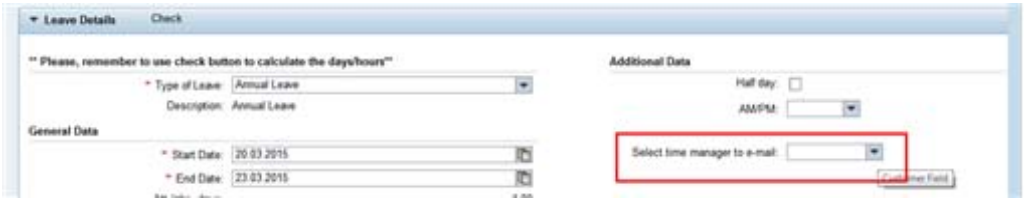
Humam EVERY - Leave Request: New



21. Enter additional information for your time manager in the New Note box. In our demonstration we entered the following text "Picking up son from college".

Next, select the time managers who should receive notification of your request.

Humam EVERY - Leave Request: New

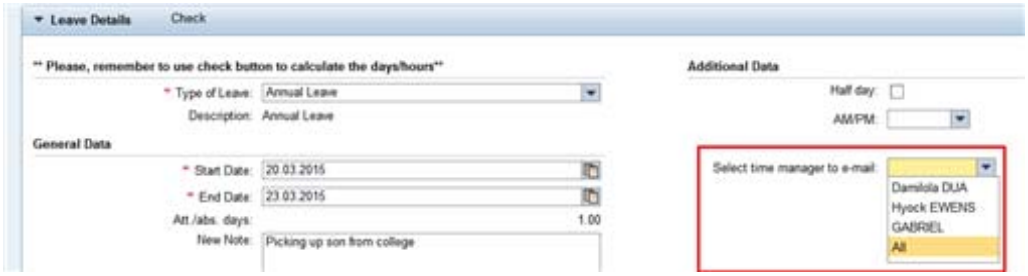


22. Click on the drop-down arrow to view a list of your primary and secondary time managers. The list may be blank if your primary manager has not delegated this responsibility.

Your primary time manager will automatically receive notification of your leave request even if s/ he has delegated the time approval function to a secondary manager.

If they have delegated the time responsibility to a secondary time manager, your secondary manager will not be notified of the request unless they are selected from the list of time managers.

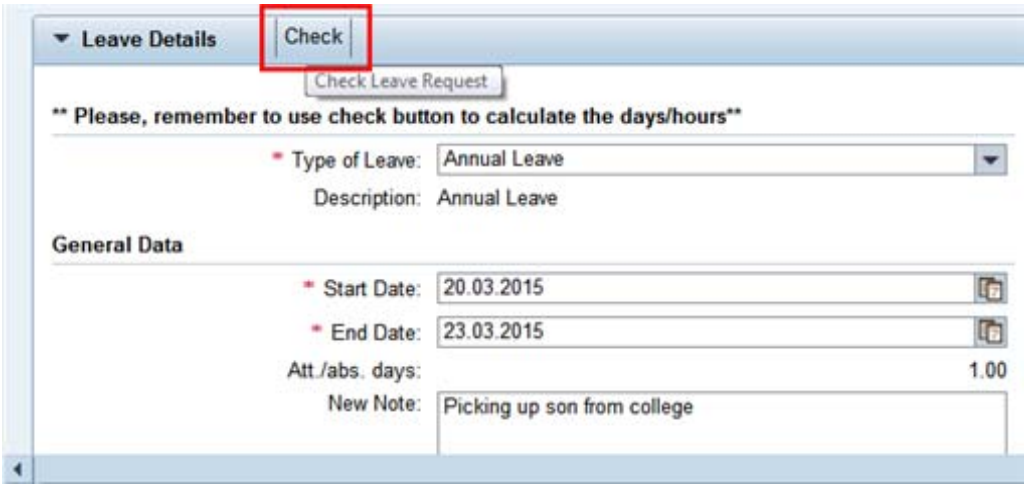
Humam EVERY - Leave Request: New



23. Select your secondary time manager from the list who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

Next, we are going to have the system check your request against your quota.

Humam EVERY - Leave Request: New

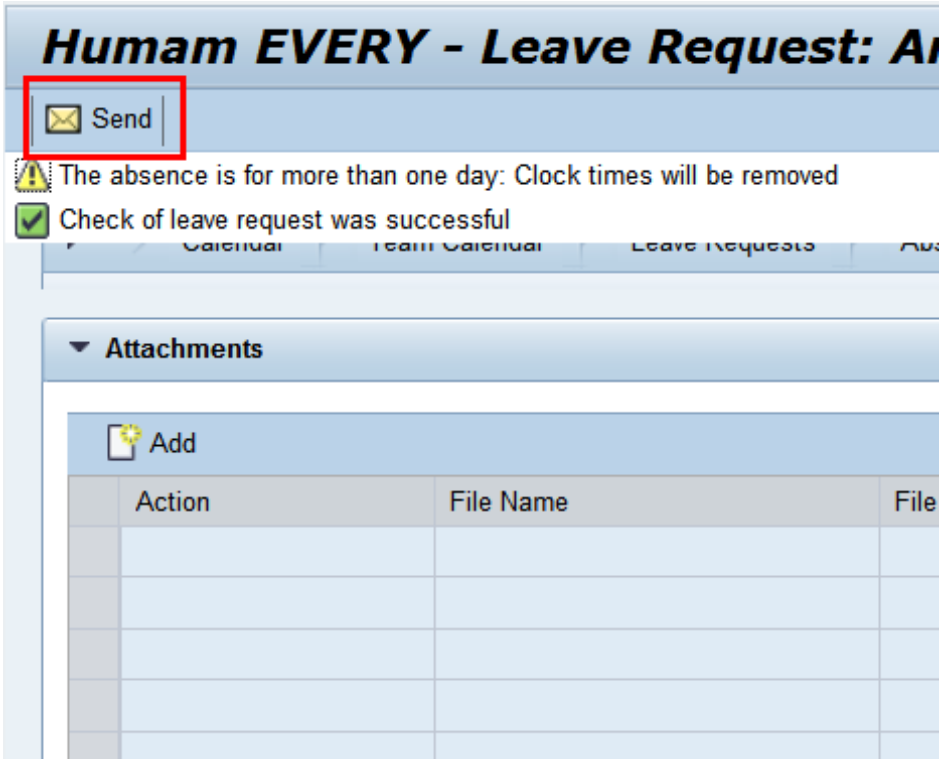


24.

Click on the Check button. The number of request leave days will be calculated.

Next, you are ready to submit your request.

Humam EVERY - Leave Request: Annual Leave, 20.03.2015-23.03.2015



25. Click on the Send button. You will be asked to verify the information you entered for the leave request.

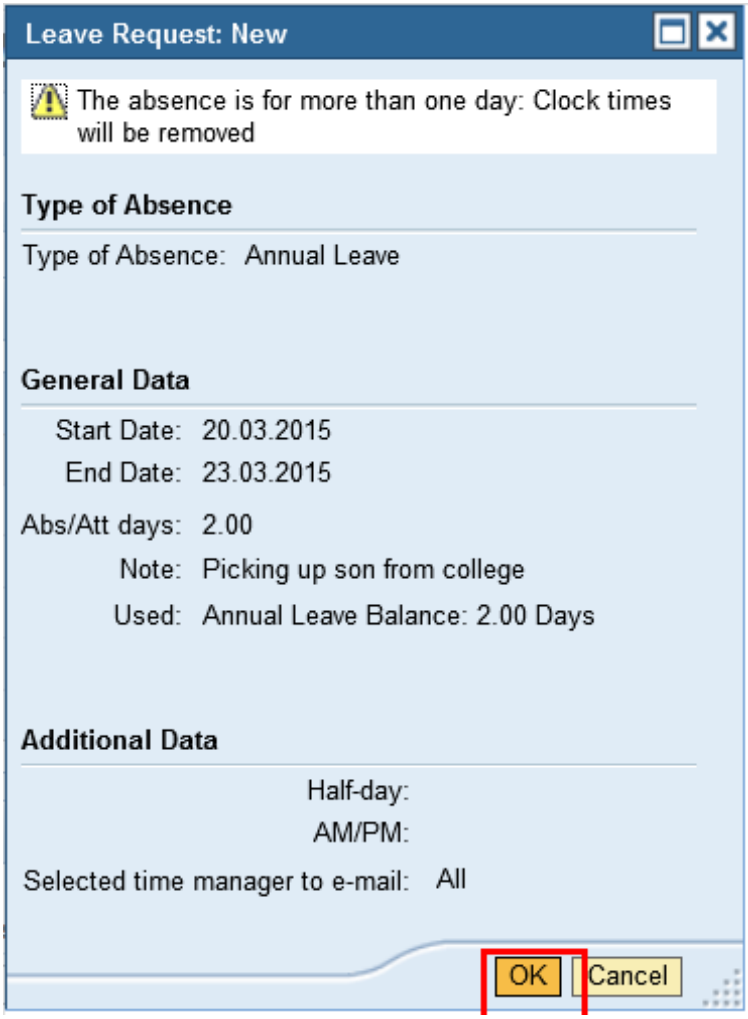
The number of leave days has been calculated.

A message will appear at the top of the screen indicating whether the check was successful or there are conflicts.

The number of leave days has been calculated.

A message will appear at the top of the screen indicating whether the check was successful or there are conflicts.

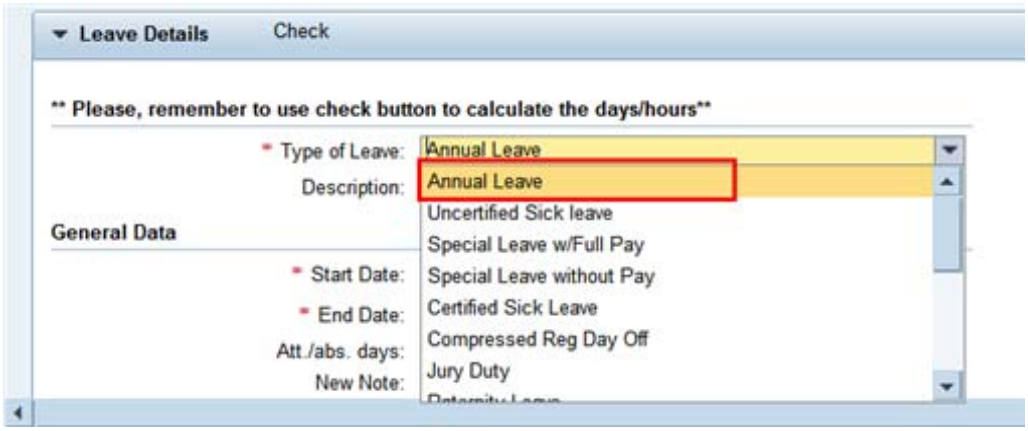
Leave Request: New



26. Verify the information (dates, note, calculation of used dated and managers who will be notified) and click on the OK button. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

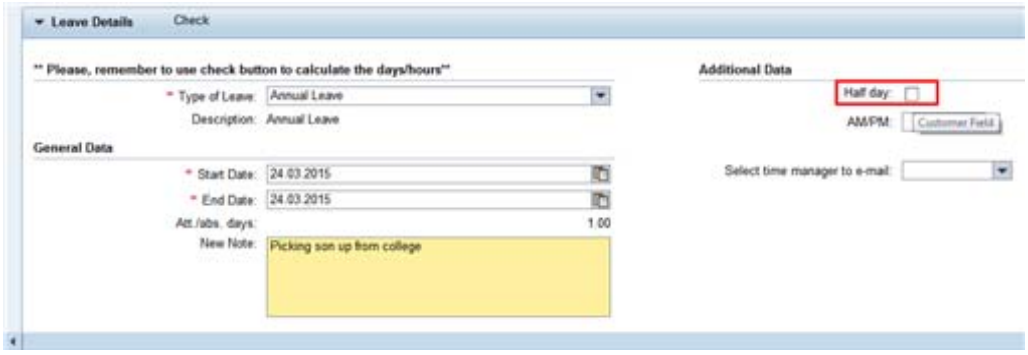
Next, we will be entering the request for a 1/2 day.

Humam EVERY - Leave Request: New



27. Select Annual Leave from the list.

Humam EVERY - Leave Request: New



28. Place a checkmark in the Half day checkbox.

Humam EVERY - Leave Request: New



29. Click on the drop-down arrow on the AM/PM field to display the available options.

Humam EVERY - Leave Request: New



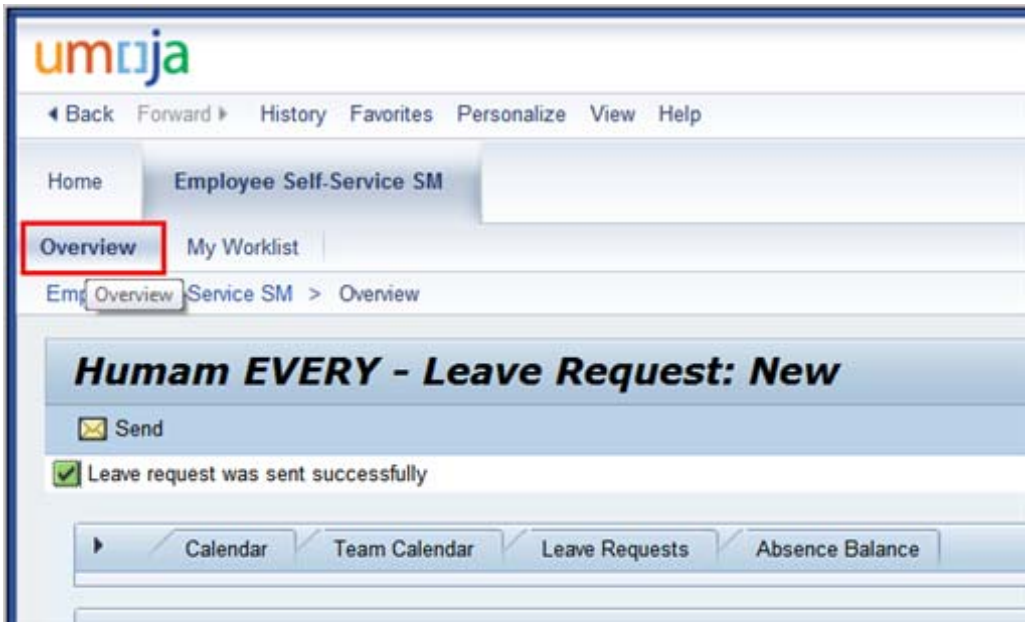
30. Select whether you will be taking the leave in the AM or PM. In our demonstration we will select AM.

Proceed to complete the remaining fields for the date(s) you will be away and the manager(s) you wish to receive notifications by following the instructions outlined in Steps 16 through 26.

Next, once you have submitted your request, your time manager will either approve or reject the request and you will be notified of the decision.

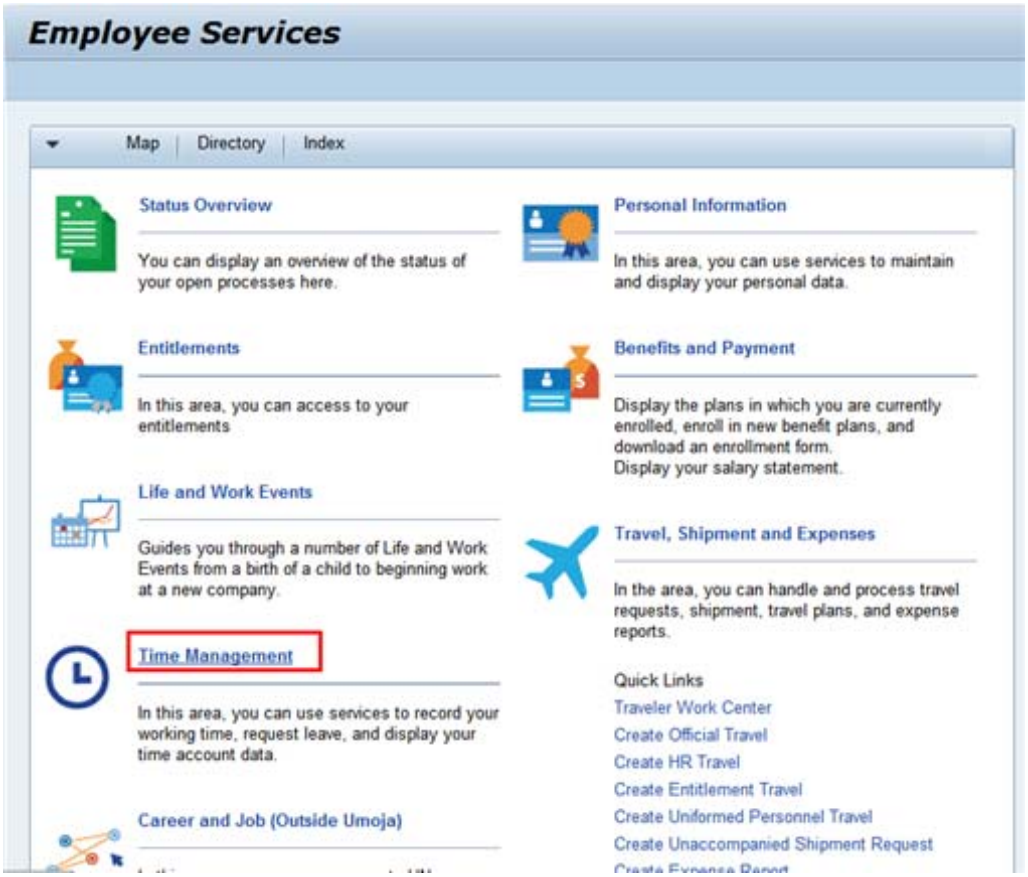
Once you have received notification, you can check the status by performing the following steps.

Create Leave Request - Umoja qa portal - Q3J - Windows Internet Explorer



31. Click on the **Overview** tab to view the status of your requests.

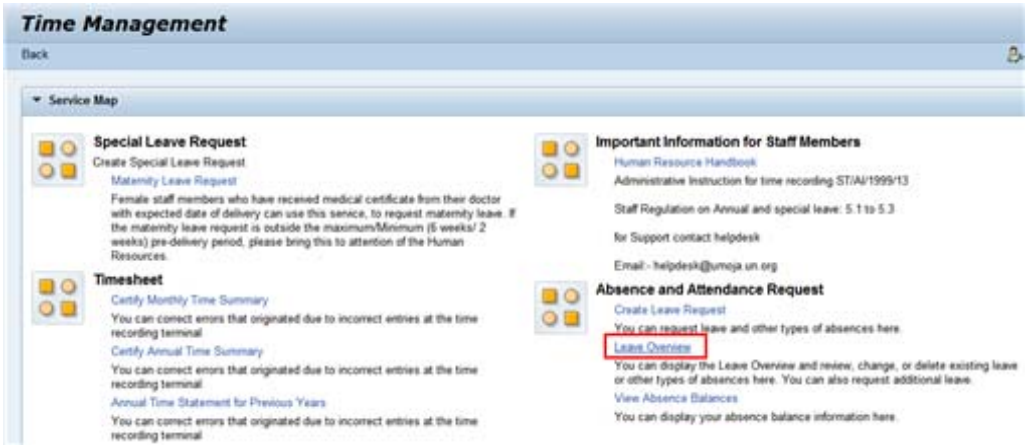
Employee Services



32.

Click on the **Time Management** link.

Time Management



33. Click on the Leave Overview link.

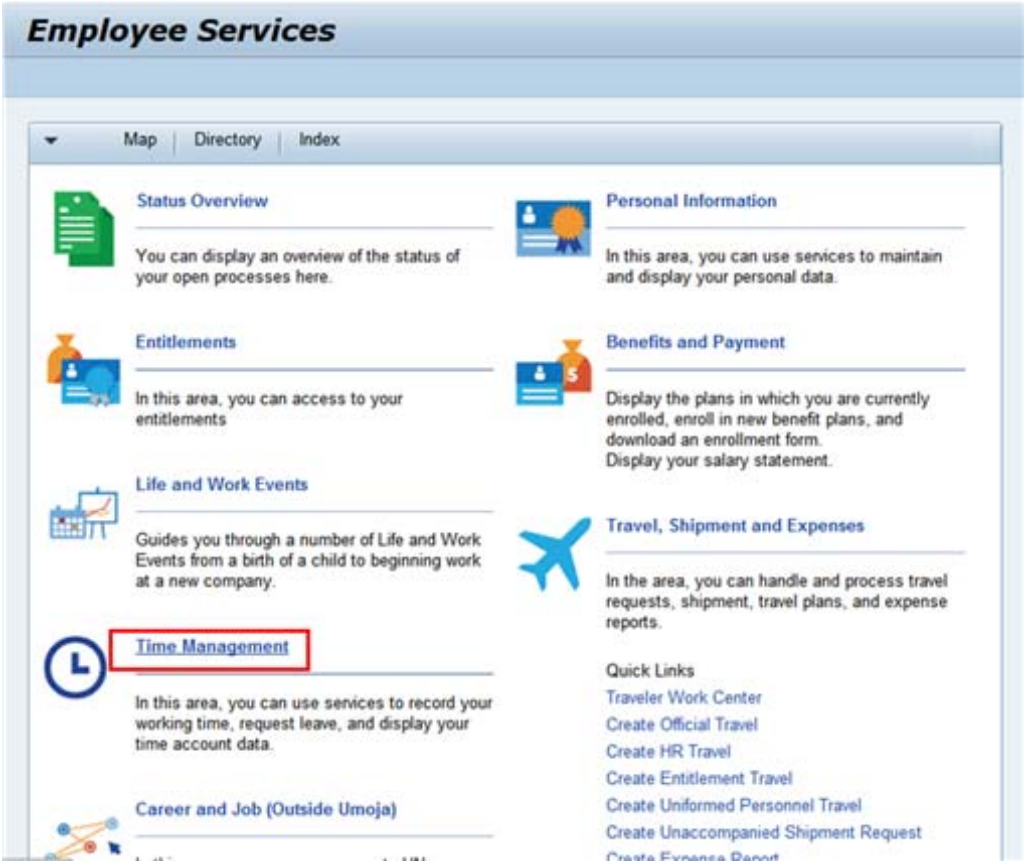
Leave Overview



34. The status of each request will be either Approved or Rejected. For requests with quota the days requested will appear in the Used column.

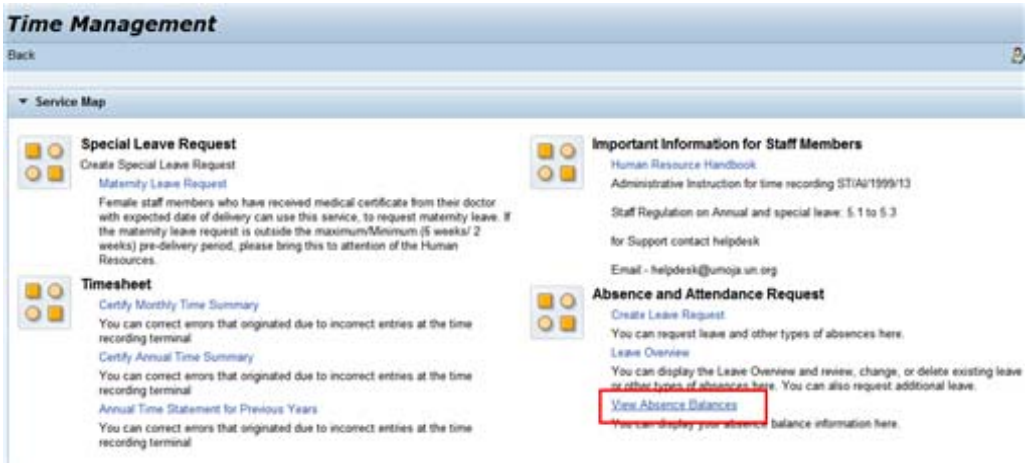
Next, you can check your absence balances by performing the following steps.

Employee Services



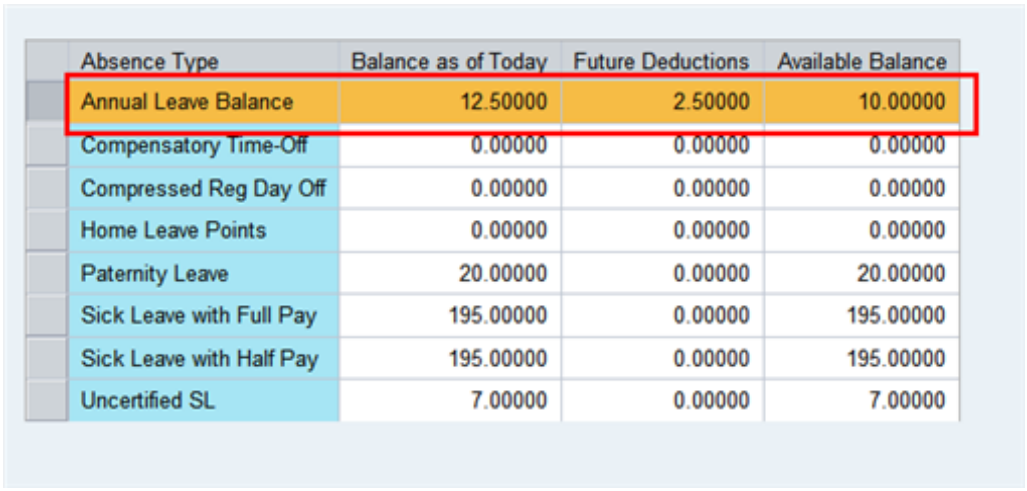
35. Click on the **Time Management** link.

Time Management



36. Click on the View Absence Balances link.

Show Absence Quota



Absence Type	Balance as of Today	Future Deductions	Available Balance
Annual Leave Balance	12.50000	2.50000	10.00000
Compensatory Time-Off	0.00000	0.00000	0.00000
Compressed Reg Day Off	0.00000	0.00000	0.00000
Home Leave Points	0.00000	0.00000	0.00000
Paternity Leave	20.00000	0.00000	20.00000
Sick Leave with Full Pay	195.00000	0.00000	195.00000
Sick Leave with Half Pay	195.00000	0.00000	195.00000
Uncertified SL	7.00000	0.00000	7.00000

37. Note that the 2.5 days requested and approved by your time manager have been deducted from your quota.



If you have submitted a request for Home Leave, Family Visit or Reverse EGT, then once your request has been approved you must submit a request for travel. Once submitted, the HR and Travel teams will review for eligibility of Entitlement.

Purpose

Use this procedure to submit requests for the following leave absences:

- Certified Sick Leave - used to record sick leave with full pay only.
- Uncertified Sick Leave - used for uncertified sick leave (USL is 7 days per cycle).
- Jury Duty - used to record time spend reporting/servicing jury duty.

Intended Audience

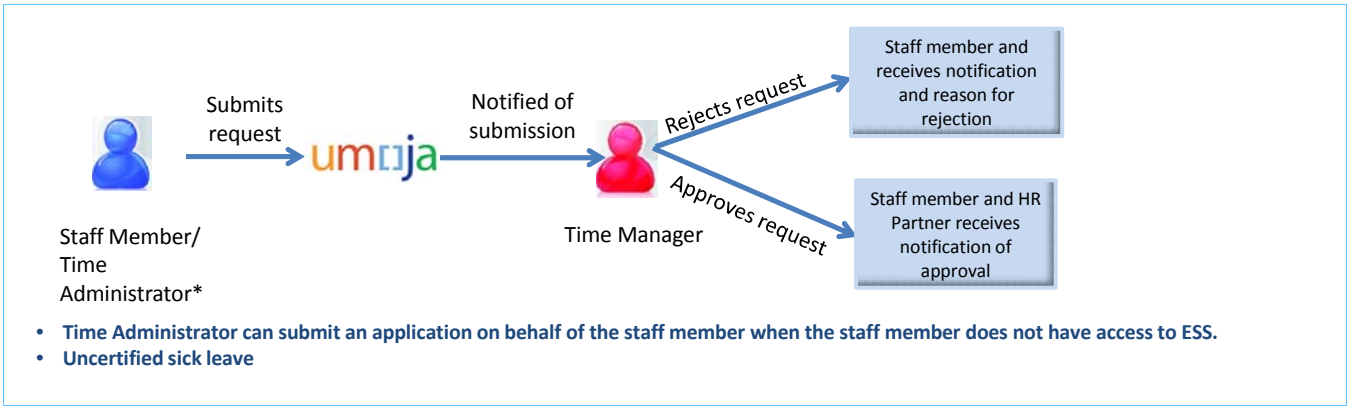
- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.

Different types of leaves may require different levels of approval. Below is a description of the types of leaves covered by this procedure and their approval requirements.

Uncertified Sick Leave



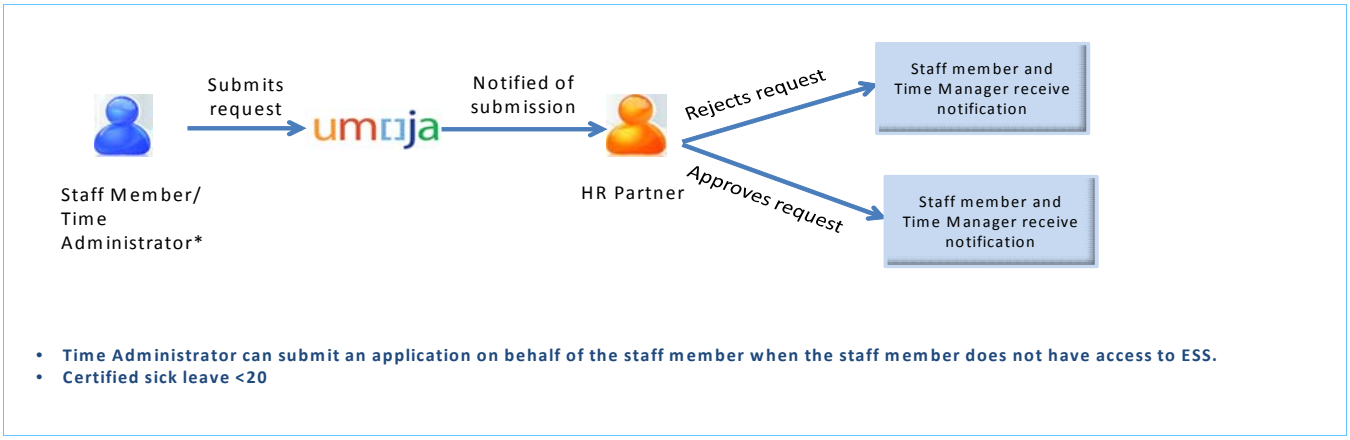
1. ***Staff member*** submits a request for leave through the Umoja Employee Self-Service portal.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.

a. If the ***Time Manager*** approves the request, the request is recorded in ECC and a notification is sent to the ***staff member.*** Uncertified sick leave is not a different quota from sick leave, so any time taken as uncertified sick leave will be deducted from the sick leave with full pay quota.

b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Certified Sick Leave for less than 20 days in a cycle or Jury Duty

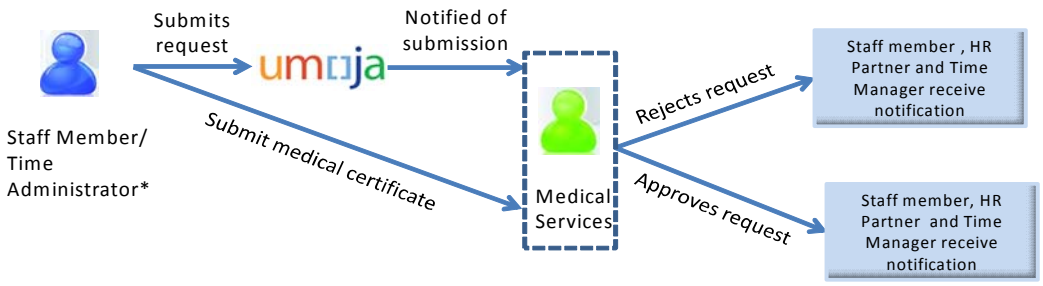
This type of leave requires the approval from the ***HR Partner***.



1. ***Staff member*** submits a request for leave through the Umoja Employee Self-Service portal and attaches a medical certificate without a diagnosis from a licensed practitioner or the notification of jury duty.
2. ***HR Partner*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***HR Partner*** approves the request, the request is recorded in ECC and a notification is sent to the ***staff member*** and ***Time Manager.***
   b. If the ***HR Partner*** rejects the request, the ***staff member*** and ***Time Manager*** are notified. The ***staff member*** will need to create and submit a new request.

Certified Sick Leave for more than 20 days during a leave cycle.

This type of leave requires the approval from ***Medical Services***.



- **Time Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**
- **Certified sick leave >20**

1. ***Staff member*** submits offline a medical certificate with a diagnosis from a licensed medical practitioner to ***Medical Services.***
2. ***Staff member*** submits a request for leave through the Umoja Employee Self-Service portal.
3. Once the system identifies that you are exceeding 20 days of sick leave in a cycle, it will be routed to ***Medical Services*** for review.
4. ***Medical Services*** reviews the request.
   a. If ***Medical Services*** approves it a notification is sent to the ***staff member, HR Partner*** and ***Time Manager.***
   b. If ***Medical Services*** rejects it, the ***staff member, HR Partner*** and ***Time Manager*** are notified. The ***staff member*** will need to create a new request and submit additional information for reconsideration.

Pre-requisites

- For certified sick leave less than 20 days, a medical certification without a diagnosis.
- For certified sick leave greater than 20 days, a medical certification with a diagnosis.
- For jury duty, notification of jury duty.

Objectives

As part of the demonstration, we will show you:

1. How to check your sick leave balances.
2. How to submit a sick leave request
3. How to check the status of your request.

Scenario

A ***staff member*** submits a request for 20 days of certified sick leave starting on 13 April and ending on 11 May.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

1. Start the transaction using the menu path:

Employee Self-Service>Time Management>Create Leave Request

Overview - Umoja training portal - T2J - Windows Internet Explorer



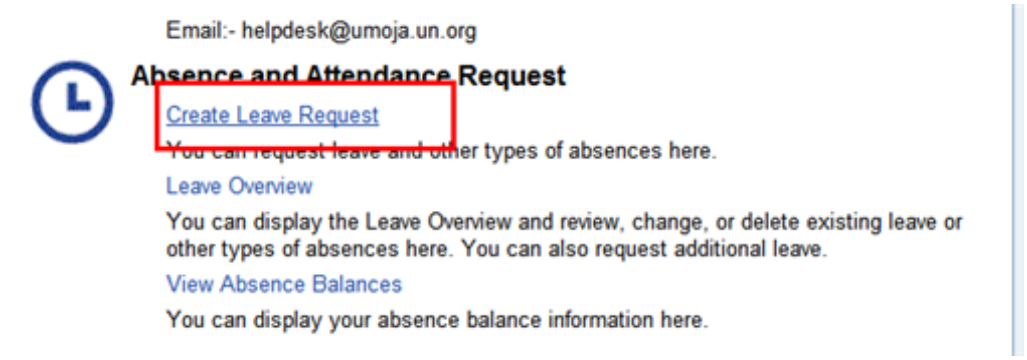
2. Click on the Employee Self-Service SM tab.

Employee Services



3. Click on the Time Management. link.

Time Management.



4. Click on the Create Leave Request link.

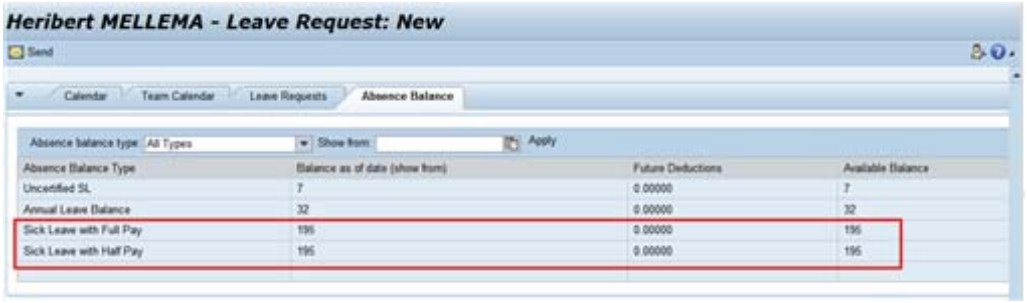
Heribert MELLEMA - Leave Request: New



5. Click on the Absence Balance tab.

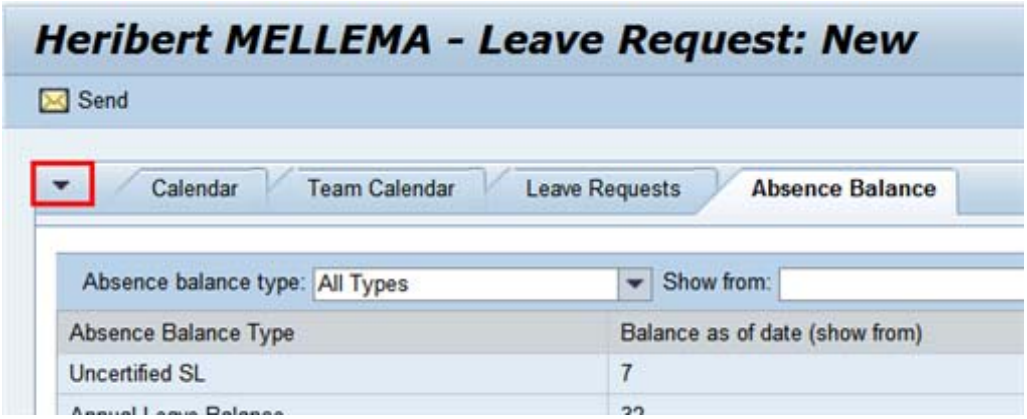
Most leave types have a quota (maximum amount of time) that can be taken as leave. You are advised to check your total balance at the time of the request so that you know how much time you can request.

Heribert MELLEMA - Leave Request: New



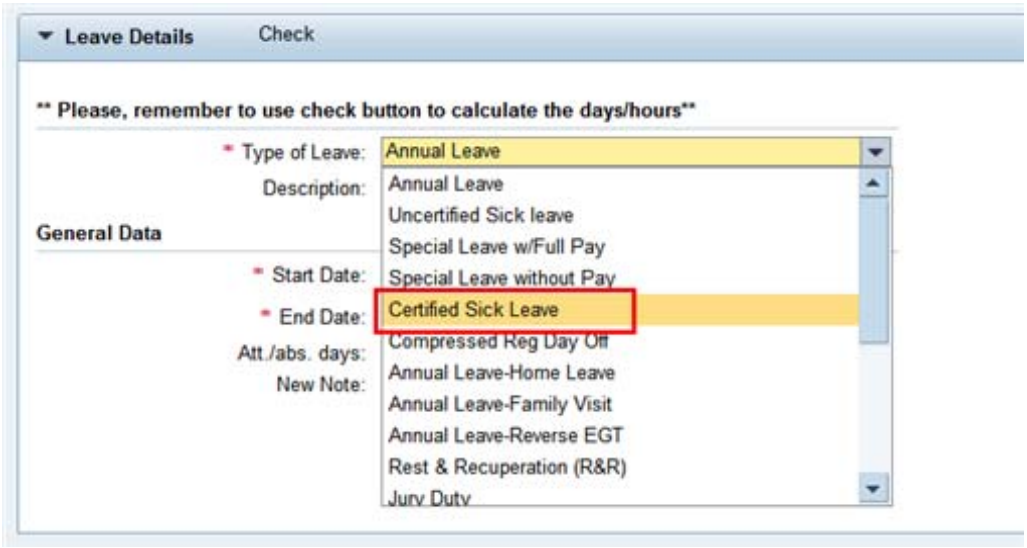
6. Your available balances will be displayed in the Available Balance column. In this scenario, the staff member has a balance of 195 days of sick leave on full pay and 195 on half pay. There are no future approvals that may be deducted from the quota so the total available balance remains 195 for both and we know we can proceed with the request.

Heribert MELLEMA - Leave Request: New



7. Click on the collapse button to close the Absence balance section.

Heribert MELLEMA - Leave Request: New

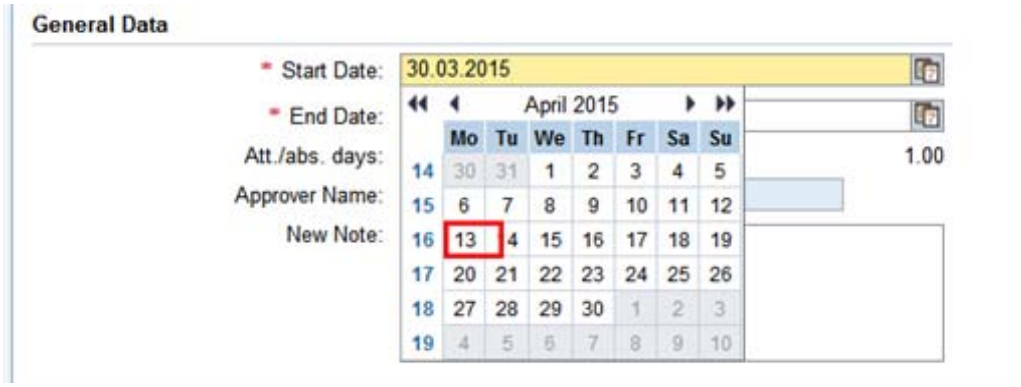


8. Select the type of leave request from the list of options. In this demonstration, we will be selecting "Certified Sick Leave" but the same procedure can be used to select uncertified sick leave or jury duty.

Each of these requests can be made in advance within the following time periods:

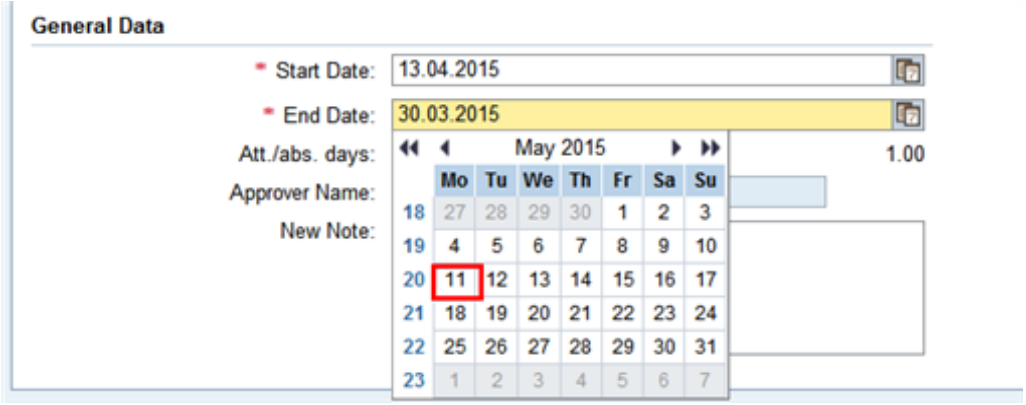
- Jury Duty - 1 month
- Certified Sick Leave - 3 years
- Uncertified Sick Leave - 1 month

Heribert MELLEMA - Leave Request: Certified Sick Leave, 30.03.2015



9. Select the date the leave is to start. Dates can be selected from the calendar by clicking on the Calendar icon or entering directly into the field using the DD.MM.YYYY format. In this demonstration, select 13 April from the calendar.

Heribert MELLEMA - Leave Request: Certified Sick Leave, 30.03.2015



10. Select the date the leave is to end. Dates can be selected from the calendar by clicking on the Calendar icon or entering directly into the field using the DD.MM.YYYY format. In this demonstration, select 11 May from the calendar.

Heribert MELLEMA - Leave Request: Certified Sick Leave, 30.03.2015



11. You may add remarks or comments to the approver in the New Note box, for example we added "I have to take 20 days of certified sick leave".

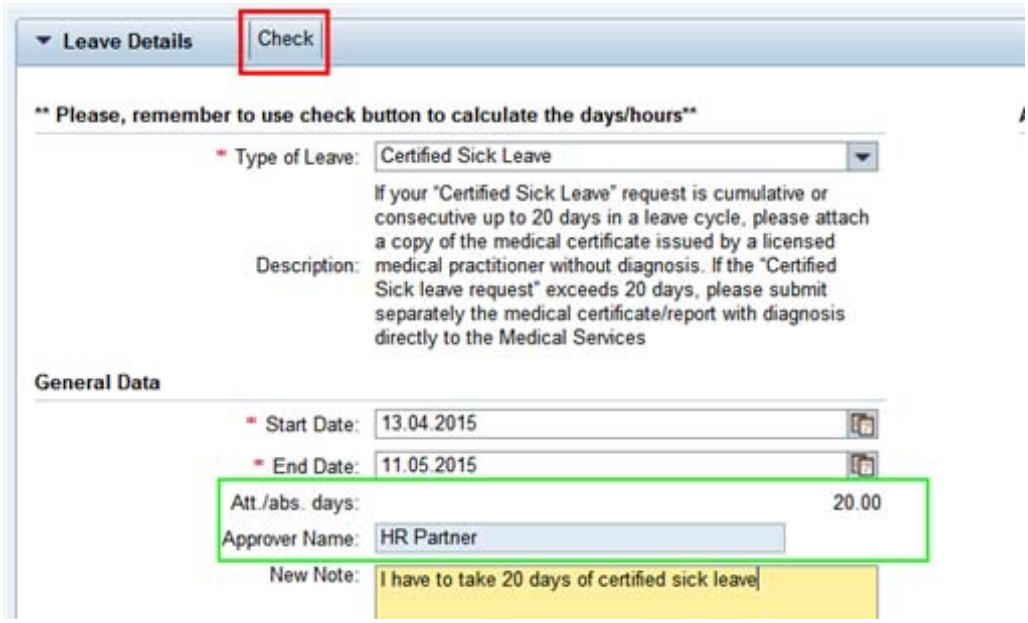
Heribert MELLEMA - Leave Request: Certified Sick Leave, 30.03.2015



12. You can request a half day leave by placing a checkmark in the half day field and selecting whether you are taking the AM or PM off. By default the range of dates are full days, if you click on half days the range of dates will be half days. In this example, the box will not be checked as we are requesting 20 full days.

Remember, half day and full day requests must be entered as two separate requests. You can only use the Employee Self-Service portal to request half days of sick leave on full pay. It cannot be used to request sick leave on half pay, which must be routed offline to the HR Partner.

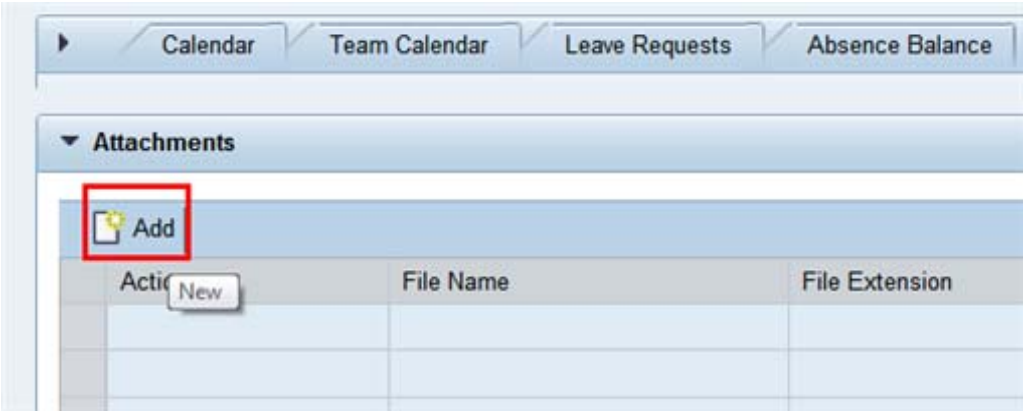
Heribert MELLEMA - Leave Request: Certified Sick Leave, 30.03.2015



13. Click on the Check button. This will check your request against any other requests you have submitted and your leave balances.

The total Att/abs. days will be calculated and the applicable approver will appear in the Approver Name field.

Heribert MELLEMA - Leave Request: New



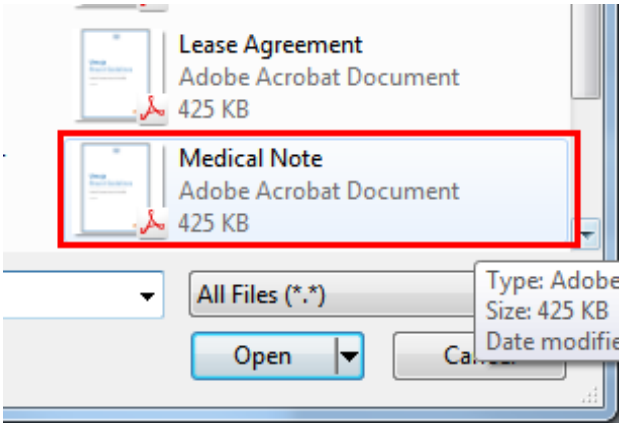
14. Click on the Add button to attach ALL required documents.

Upload New Attachment



15. Click on the browse Browse... button.

Choose File to Upload

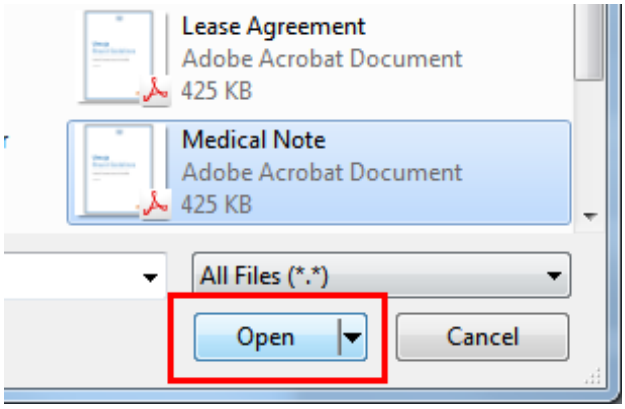


16. Select the document to attach.

- If the sick leave request is for 20 days or less than a medical certificate without a diagnosis is attached.
- If the sick leave request was for more than 20 days, then a medical certificate with a diagnosis would have to be submitted offline to Medical Services simultaneously with the submission of the request.

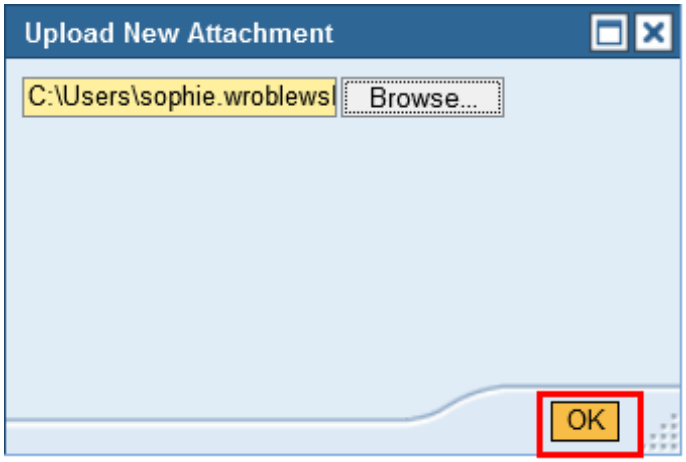
Depending on the number of days requested, the system will determine whether the request will be routed to the HR Partner or Medical Services. In this case, the request will be routed to the HR Partner since it is for 20 days or less.

Choose File to Upload



17. Click on the Open button.

Upload New Attachment



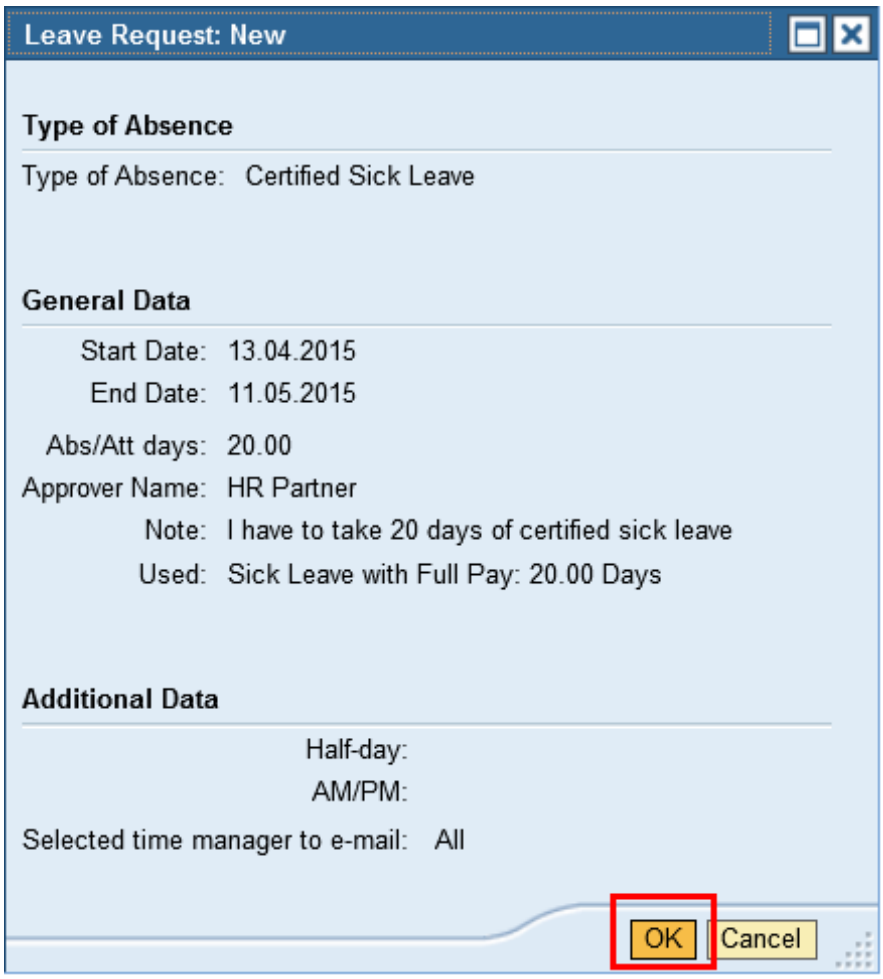
18. Click on the OK button. The attachment will appear in the list.

Heribert MELLEMA - Leave Request: Certified Sick Leave, 13.04.2015-11.05.2015



19. Click on the Send button. You will be asked to verify the information you entered for the request.

Leave Request: New



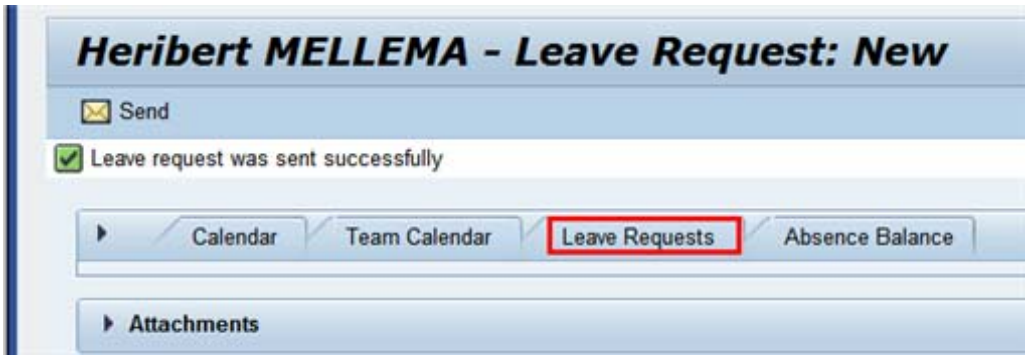
20. Verify the information (dates, note, calculation of used dates and approvers who will be notified) and click on the OK button.

Heribert MELLEMA - Leave Request: New



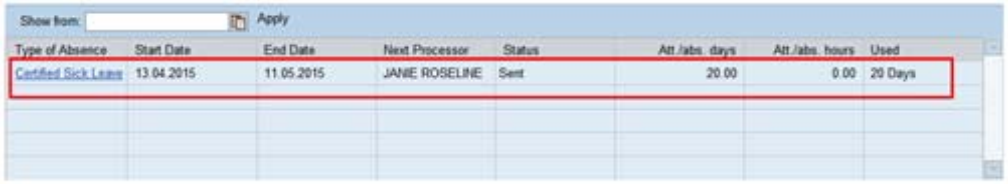
21. Your request will be sent to your HR Partner and a notification will be sent to your time manager.

Create Leave Request - Umoja training portal - T2J - Windows Internet Explorer



22. Click on the Leave Requests tab.

Leave Overview



23. Your request has been sent to your HR Partner and is shown in the Leave Requests as sent. The status will change when approved.

Purpose

This procedure is used by the ***Staff Member*** to submit requests for Rest and Recuperation (R&R) and the travel time for R&R. I

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

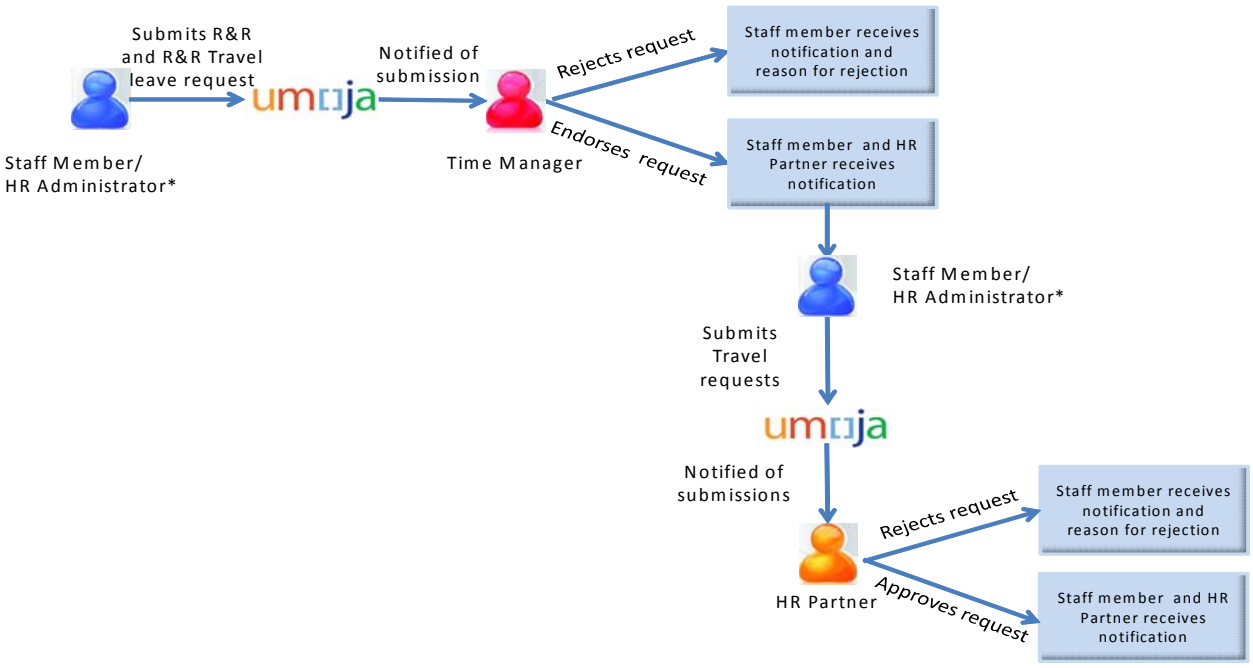
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.



1. ***Staff Member*** submits a request for Rest and Recuperation and R&R Travel.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** endorses the request, a notification is sent to the ***staff member and HR Partner.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.
3. ***Staff Member*** submits a request for Travel. The travel request must be submitted regardless of the mode of travel (UN transportation, lump sum or paid ticket) at the same time as the leave request or when the time manager has endorsed the request.
4. ***HR Partner*** checks eligibility and reviews the request for R&R and R&R Travel through the Umoja Approver Work Centre.
   a. If the ***HR Partner*** approves the leave and travel request, the leave request is recorded in ECC and a notification is sent to the ***staff member.*** The travel request will then continue the travel approval workflow for approval by the certifying officer and travel officer.
   b. If the ***HR Partner*** rejects the request, the ***staff member*** and ***Time Manager*** is notified. The ***staff member*** will need to create and submit a new leave and travel request.

   Note: The HR partner will approve or reject both the travel and leave request at the same time. So it is only upon receipt of the approval by the HR partner that the staff member

can consider that the eligibility to go on R&R has been met. The staff member is not authorised to go on R&R if only the manager has approved.

Pre-requisites

The travel request has to be submitted at the same time as the leave request or after the time manager has endorsed.

Objectives

As part of the demonstration, we will show you:

1. How to submit a request for Rest and Recuperation.
2. How to submit a request for Rest and Recuperation travel time.
3. How to check the status of your request.

Scenario

A ***staff member*** submits a request for Rest and Recuperation from 11 May 2015 to 15 May 2015. They will be traveling to the R&R destination on 10 May 2015 and returning to the duty station on 16 May 2015.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

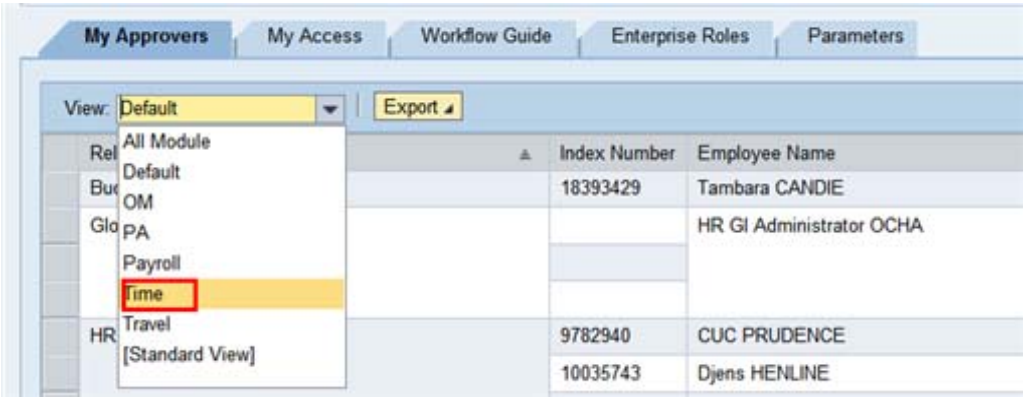
Before we submit a leave request, we will be showing you how to check the time managers and time administrators assigned to you. Every staff member is assigned a primary time manager who is responsible for approving your time related requests. Your primary time manager can delegate the role of time approver to one or more secondary time managers.

Welcome to Umoja



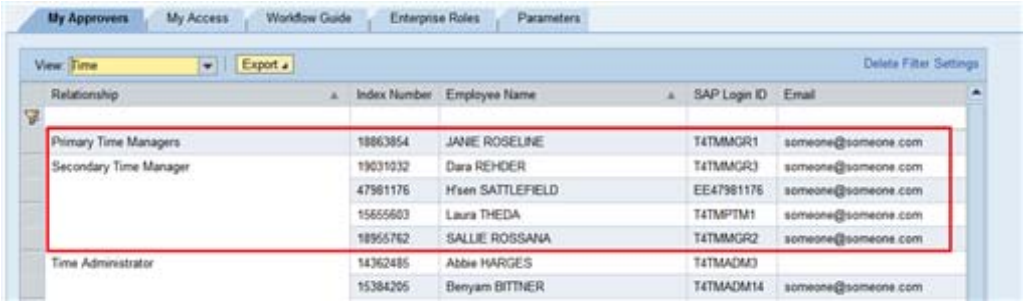
1. To find out who are your assigned Time Manager(s) and Time Administrator(s) click on the User Map link.

User or Employee Search



2. All managers and administrators assigned to you are listed in the My Approvers table, to view the managers and administrators associated with time, select Time from the View drop-down menu.

User and Employee Search



3. The Time Manager(s) and Administrators are listed. Your primary manager is JANE ROSELINE who has assigned four secondary time managers.

Next, we will be demonstrating how to create a a request for Rest and Recuperation.

4. Start the transaction using the menu path:
Employee Self-Service SM>Time Management>Create Leave Request

User Map - Umoja training portal - T2J - Windows Internet Explorer



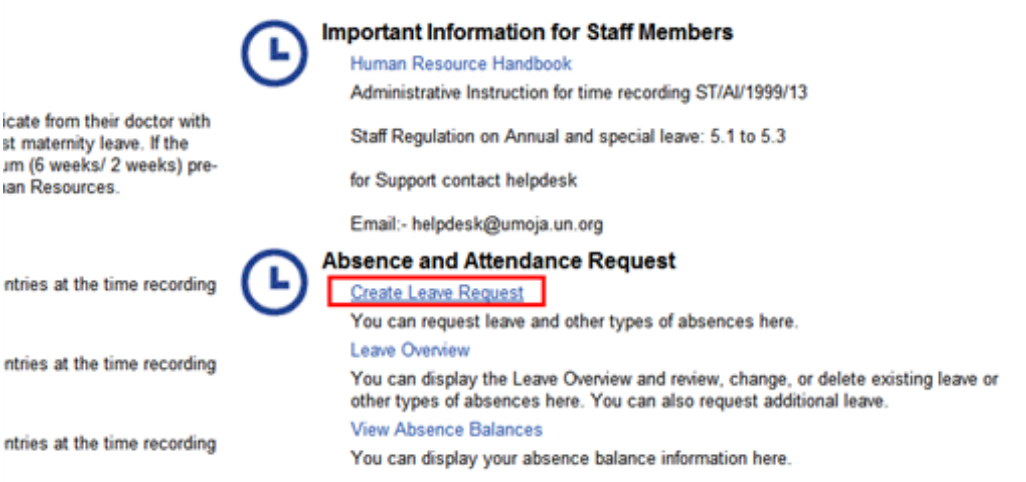
5. Click on the Employee Self-Service SM tab.

Employee Services



6. Click on the Time Management. link.

Time Management.



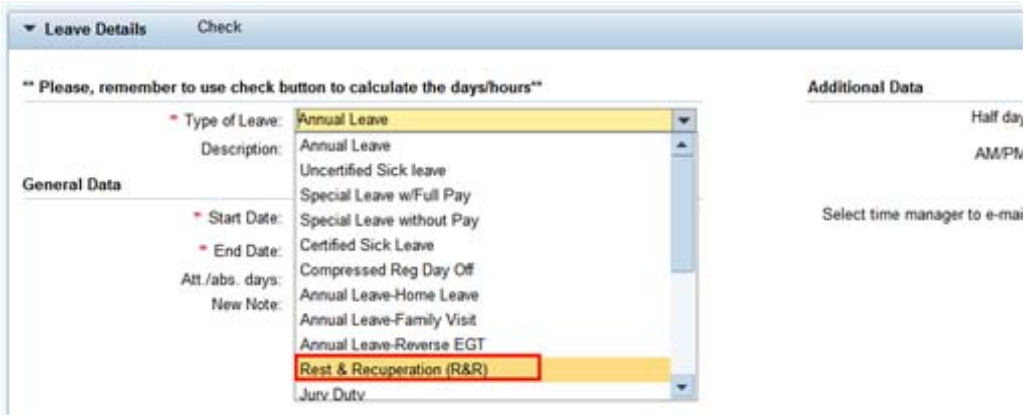
7. Click on the Create Leave Request link.

Mikhaila GISELLE - Leave Request: New



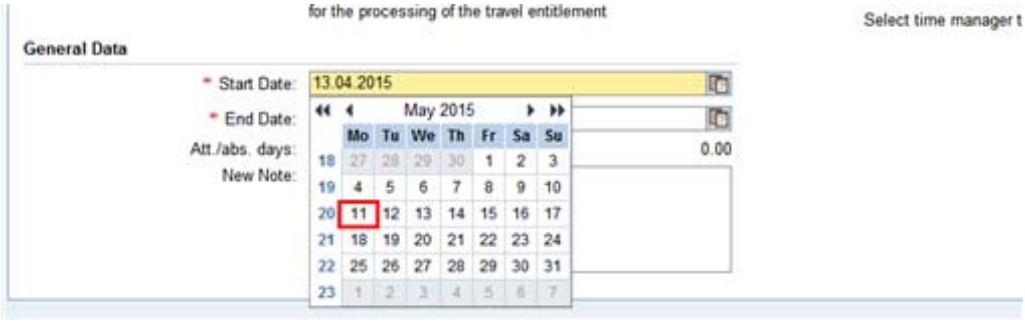
8. Click on the collapse icon to close the Absence Balance section.

Mikhaila GISELLE - Leave Request: New



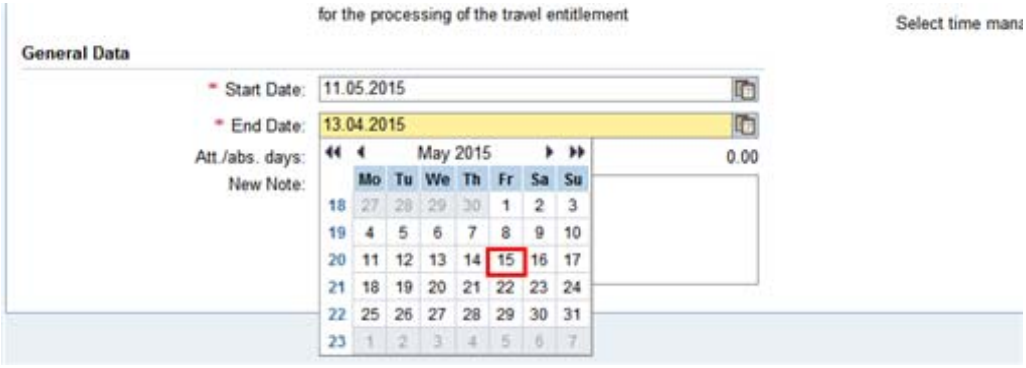
9. Select Rest & Recuperation (R&R) from the list of leave types.

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



10. Select the date the leave is to start. Dates can be selected from the calendar by clicking on the Calendar icon or entered directly into the field using the DD.MM.YYYY format. In this demonstration, select 11 May from the calendar.

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



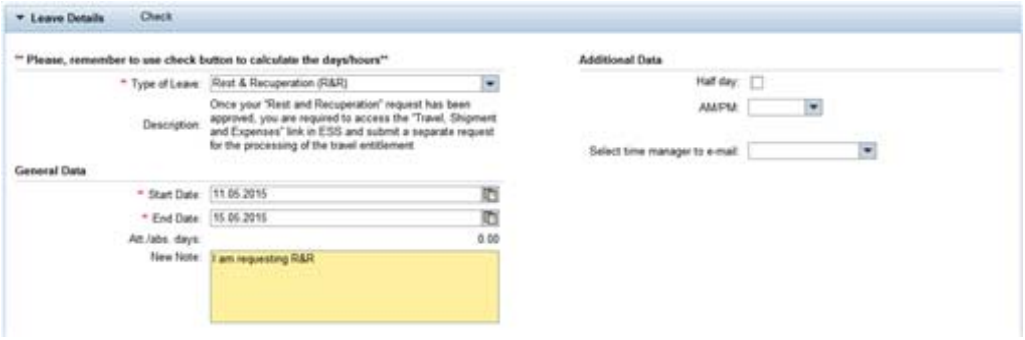
11. Select or enter the date the leave is to end. Dates can be selected from the calendar by clicking on the Calendar icon or entered directly into the field using the DD.MM.YYYY format. In this demonstration, select 15 May 2015.

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



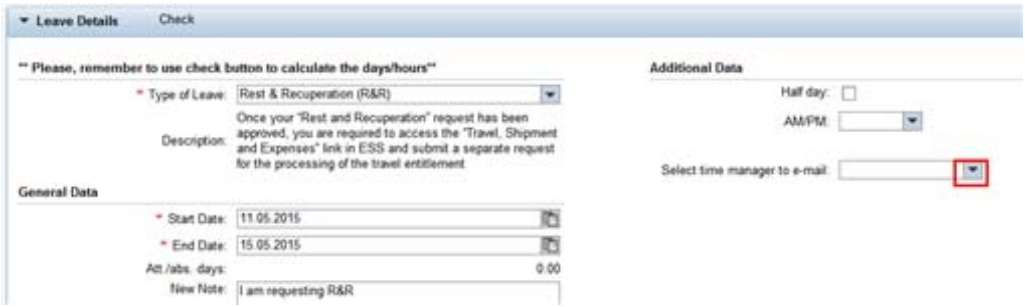
12. You may add remarks or comments in the New Note box, for example we added "I am requesting R&R".

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



Next, we will select the time manager(s) who should receive your request.

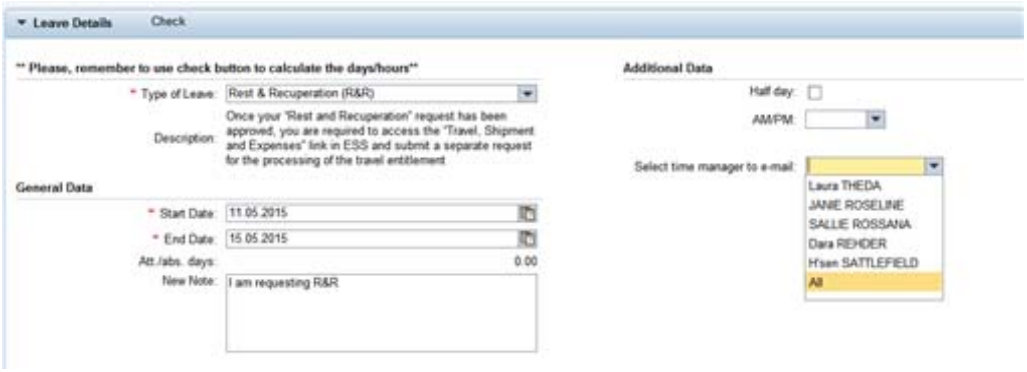
Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



13. Click on the drop-down arrow to view a list of your primary and secondary time managers. The list may be blank if your primary manager has not delegated this responsibility.
Your primary time manager will automatically receive notification of your leave request even if s/he has delegated the time approval function to a secondary manager.

If they have delegated the time responsibility to a secondary time manager, your secondary manager will not be notified of the request unless they are selected from the list of time managers.

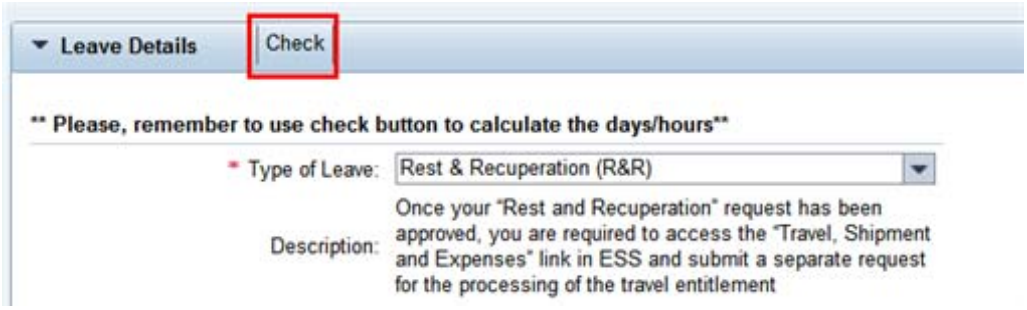
Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



14. Select your secondary time manager from the list of managers who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

Next, we are going to have the system check your request against your leave balances.

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 13.04.2015



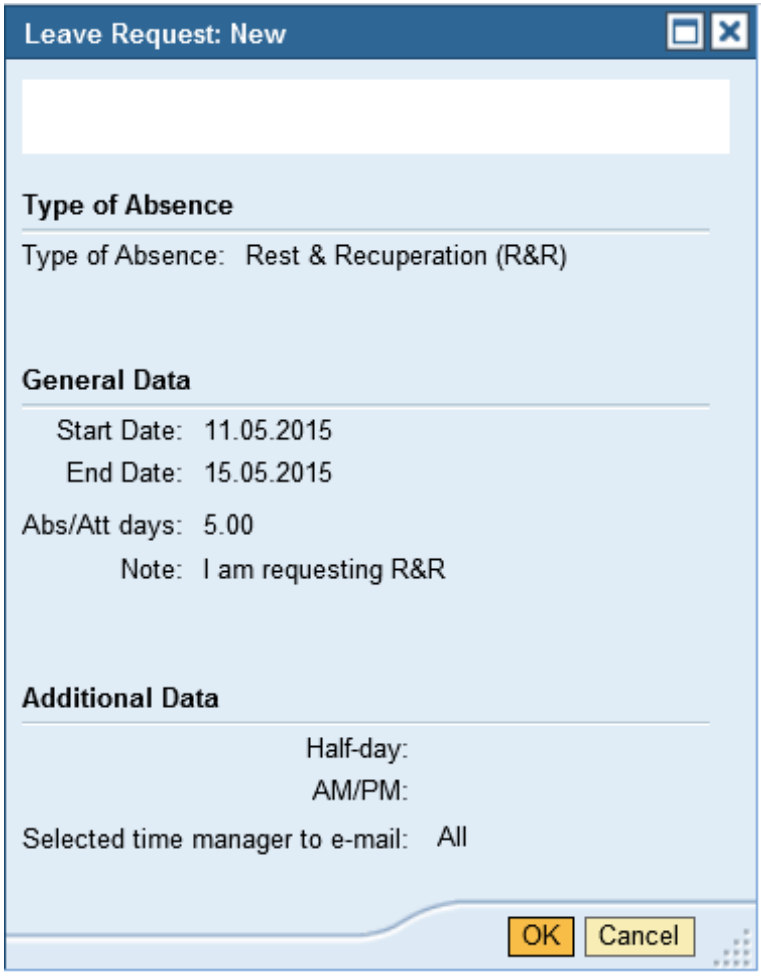
15. Click on the Check button. This will check your request against any other requests you have submitted to ensure there are no conflicts.

Mikhaila GISELLE - Leave Request: Rest & Recuperation (R&R), 11.05.2015-15.05.2015



16. Click on the Send. button. You will be asked to verify the information you entered for the request.

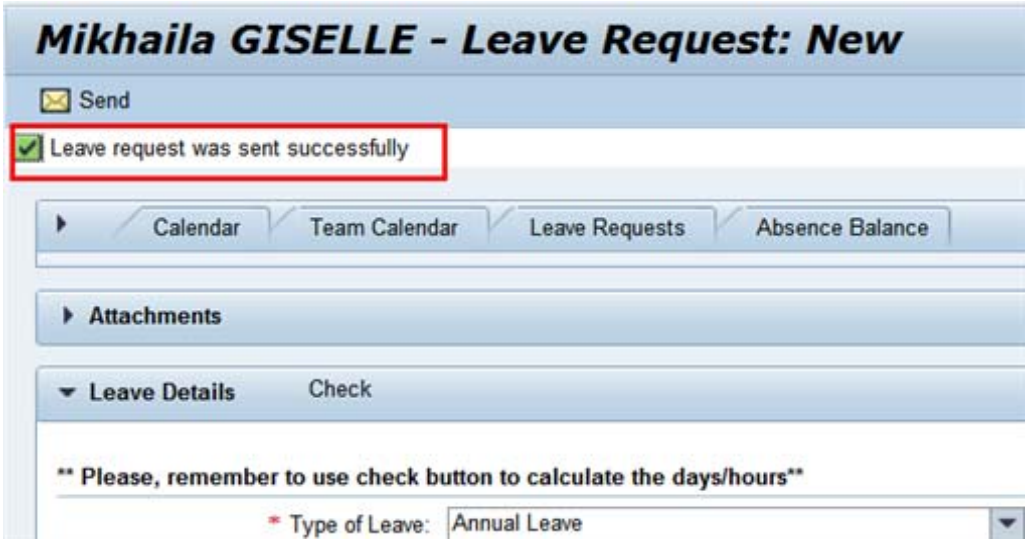
Leave Request: New



17. Verify the information (dates, note, calculation of used dates and managers who will be notified) and click on the OK button.

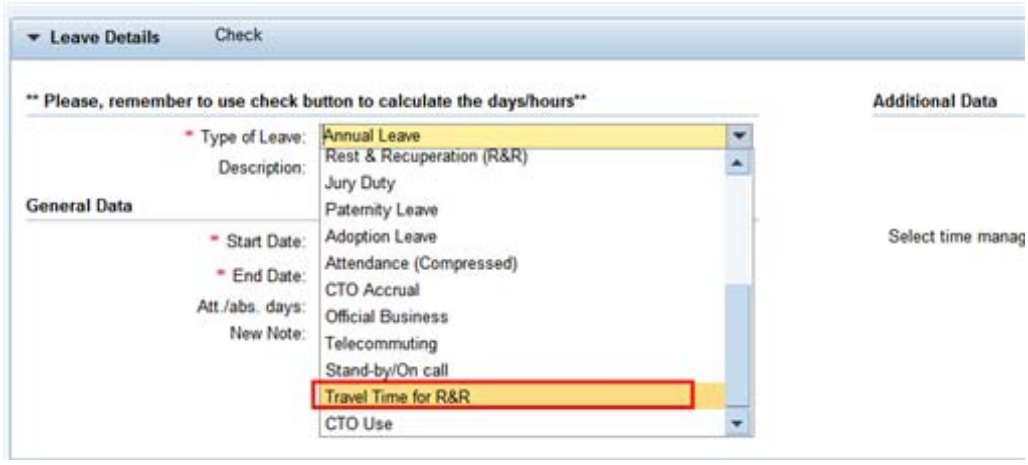
Next, you will need to enter the days you will be traveling for R&R. You will have to enter the time when you will leave and return as two separate requests. First, we will enter the date you will be leaving for R&R.

Mikhaila GISELLE - Leave Request: New



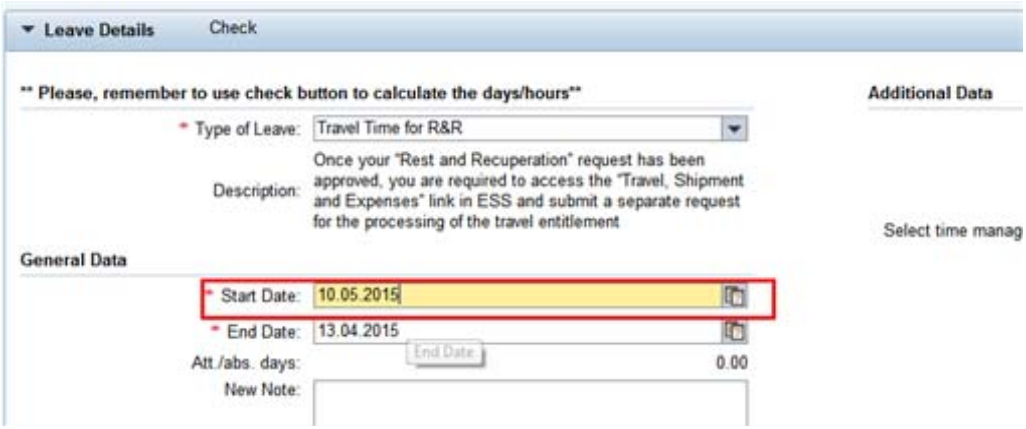
18. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

Mikhaila GISELLE - Leave Request: New



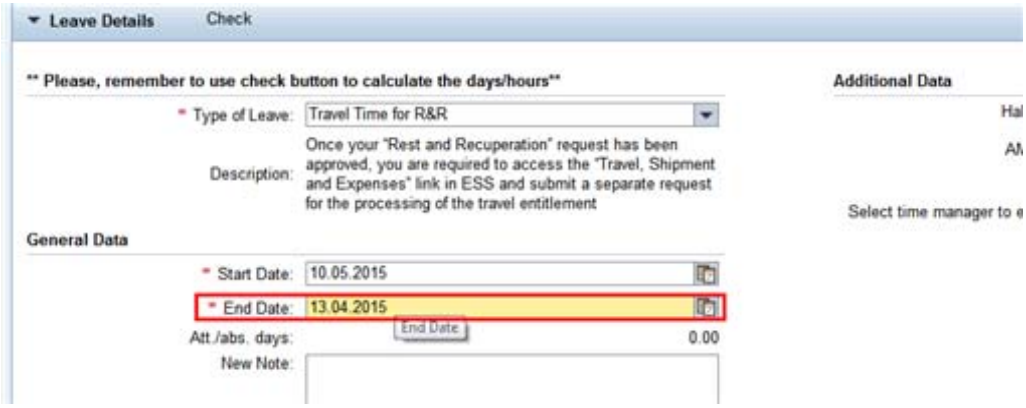
19. Select Travel Time for R&R from the list of leave types.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



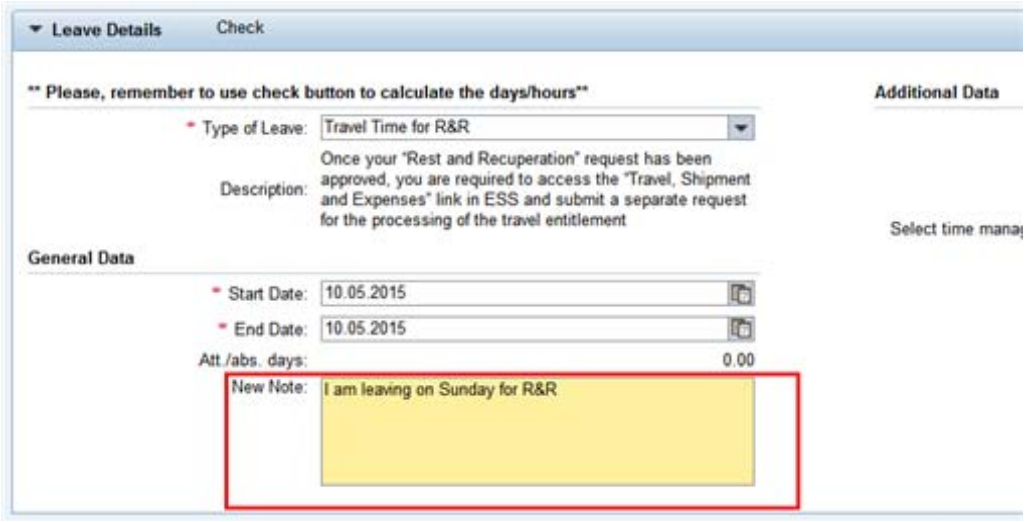
20. Select or enter the start date you will be leaving the duty station for R&R, this is the day before the first day of R&R. In this demonstration we entered the start date of 10 May 2015.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



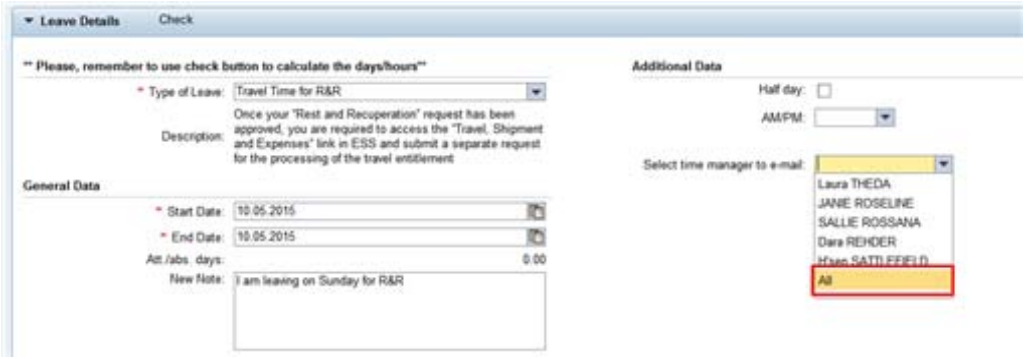
21. Select or enter the end date of your travel from the duty station for R&R, this is the same as the start date. In this demonstration we entered the end date of 10 May 2015.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



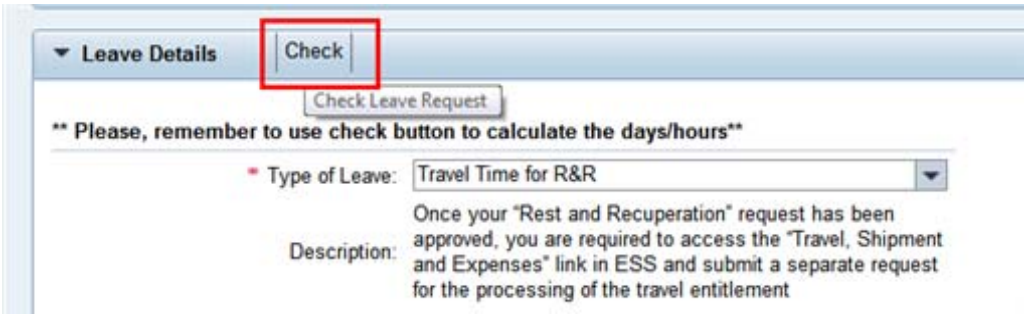
22. You may add remarks or comments in the New Note box, for example we added "I am leaving on Sunday for R&R".

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



23. Select your secondary time manager from the list of managers who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



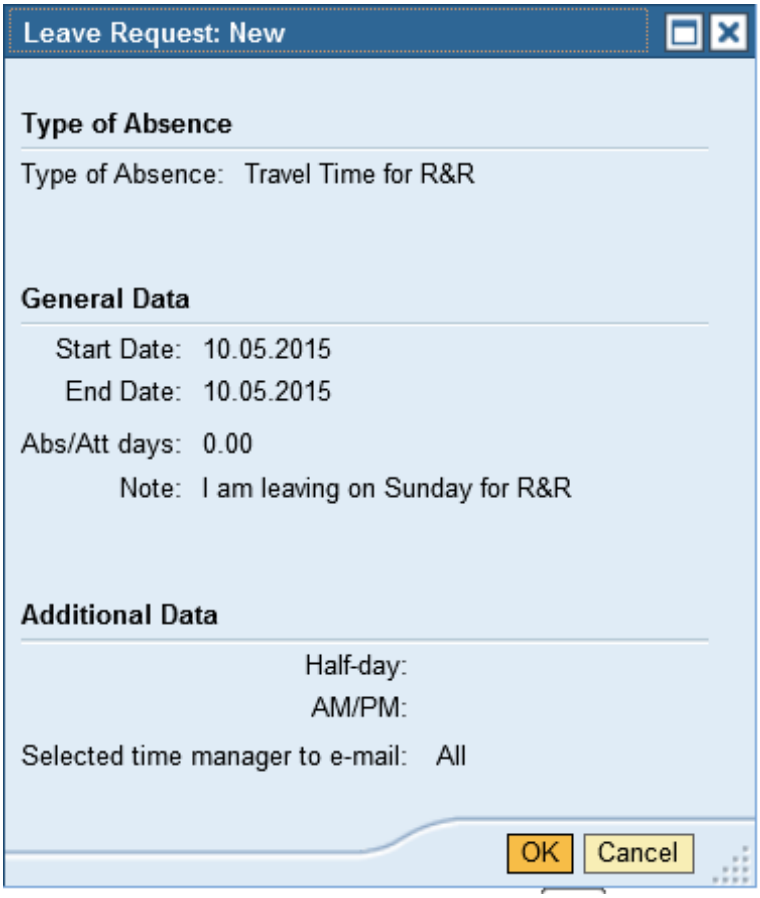
24. Click on the Check button. This will check your request against any other requests you have submitted to ensure there are no conflicts.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 10.05.2015



25. Click Send button Send.

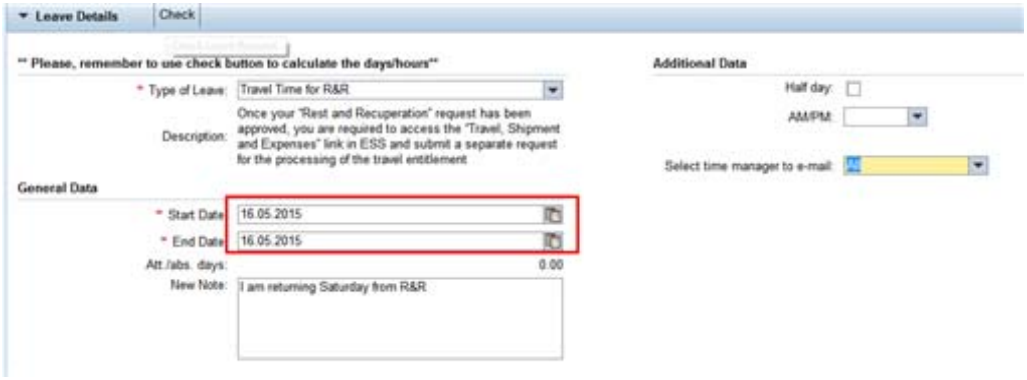
Leave Request: New



26. Verify the information (dates, note, calculation of used dated and managers who will be notified) and click on the OK button. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

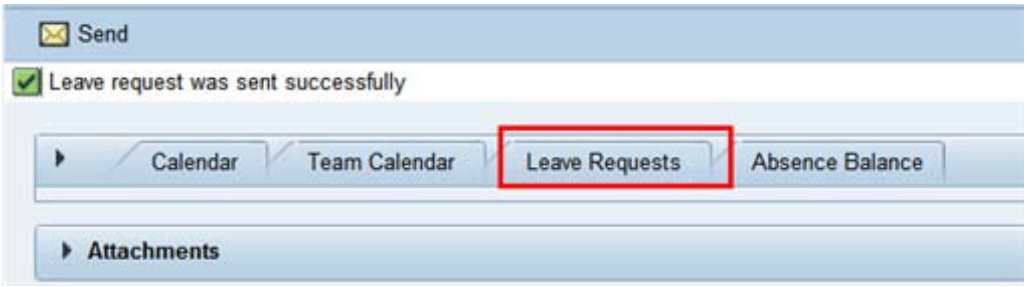
Next, we will enter the Travel time for R&R for the return trip.

Mikhaila GISELLE - Leave Request: Travel Time for R&R, 13.04.2015



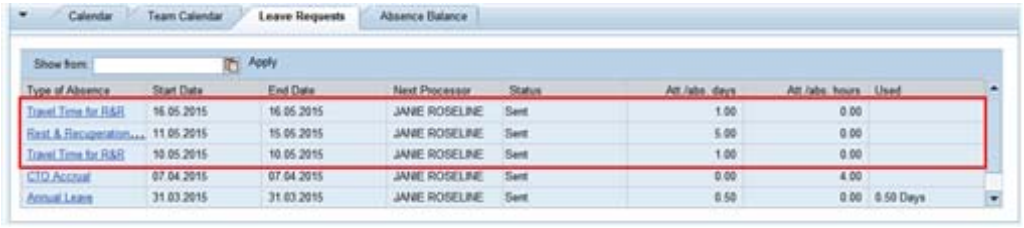
27. Next, record your return to the duty station from R&R travel time. This will be the day after the last day of R&R and the steps are the same as those you just performed for the travel time from the duty station (steps 19 to 25). In this demonstration we will be entering our return date as 16 May 2015.

Mikhaila GISELLE - Leave Request: New



28. Once you have entered and sent your R&R request and From/To R&R Travel requests to your time manager, click on the Leave Requests tab.

Mikhaila GISELLE - Leave Request: New



29. Your requests have been sent to your time manager and are shown in the Leave Requests as sent. The status will change when approved. Your Primary time manager will appear in the table but the request will also be sent to any secondary manager you selected in the steps above.

Next, you must submit a request for travel before your request can be approved by the HR Partner, refer to the documentation on Travel for more information.

Purpose

Use this procedure to submit requests for the following leave absences:

- ***Special Leave with full pay*** - used to request a leave for the following reasons:
  - ***Studies/Research*** - used for advanced study or research that is approved as being in the interests of the organization.
  - ***Adoption*** - used when adopting a child.
- ***Special Leave without pay*** - used to request a leave for the following reasons:
  - ***Studies/Research*** - used for advanced study and research that does not fall under the list of approved studies/research.
  - ***Family Leave*** - used when the staff member needs to take leave to take care of family (child care, family emergency, death in the family etc.)
  - ***Government Service (technical)**** - used when the staff member wants to take leave of absence to work for a government to render temporary services involving functions of a technical nature.
  - ***Military Service*** - used when the staff member needs to take leave to serve in the armed forces of their country.
  - ***Employment Outside UN**** - used when the staff member wants to take temporary employment outside the UN.

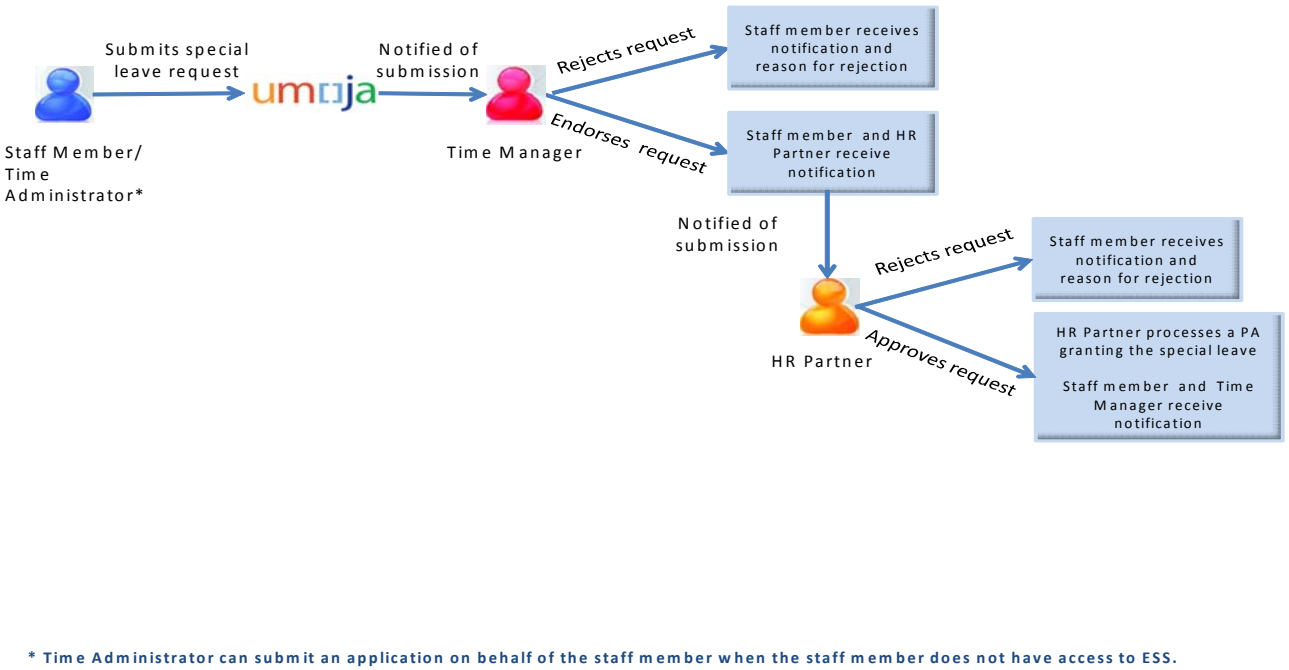
**** In addition to the ESS leave request, these activities require an offline request to the HR partner requesting permission to carry out outside activities.***

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.



* Time Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.

1. ***Staff member*** submits a request for special leave through the Umoja Employee Self-Service portal.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** endorses the request, and a notification is sent to the ***staff member*** and ***HR Partner.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.
3. ***HR Partner*** checks eligibility and reviews the request for special leave through the Umoja Approver Work Centre.
   a. If the ***HR Partner*** approves the special leave, the ***HR partner*** will process a Personnel Action in ECC granting the special leave and then approve the leave request in the ESS Portal. The special leave absence is recorded in ECC and a notification is sent to the ***staff member*** and ***Time Manager.***
   b. If the ***HR Partner*** rejects the request, the ***staff member*** and ***Time Manager*** are notified. The ***staff member*** will need to create and submit a new special leave request.

Objectives

As part of the demonstration, we will show you:

1. How to submit a special leave request
2. How to ensure your secondary time manager(s) receive notification of your request.
3. How to check the status of your request.

Scenario

A ***staff member*** was accepted to a 1 year masters program and submits a request for special leave without pay for 1 year starting 1 May 2015 and ending 30 April 2016.

Menu Path

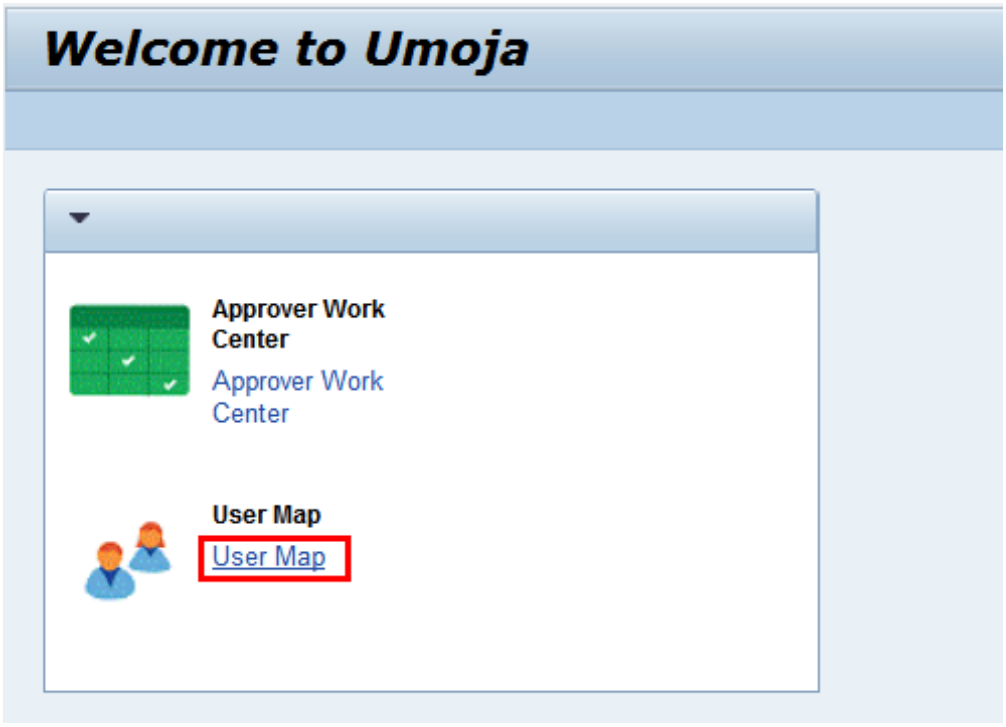
Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

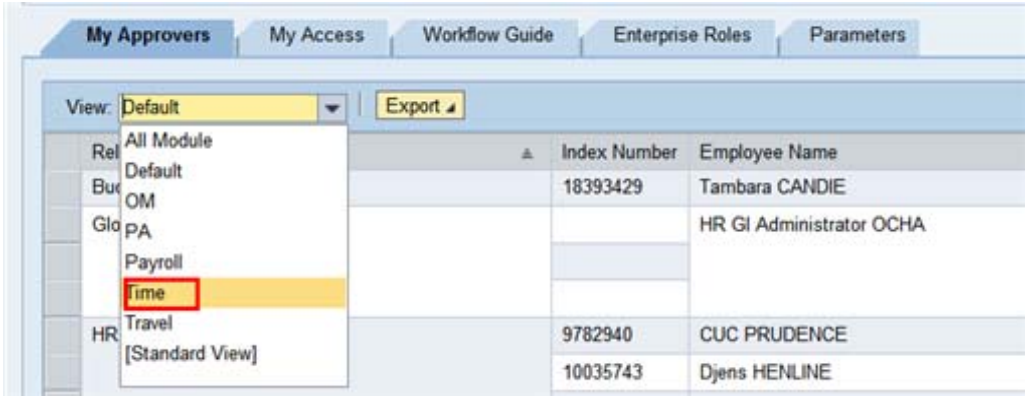
Before we submit a leave request, we will be showing you how to check the time managers and time administrators assigned to you. Every staff member is assigned a primary time manager who is responsible for approving your time related requests. Your primary time manager can delegate the role of time approver to one or more secondary time managers.

Welcome to Umoja



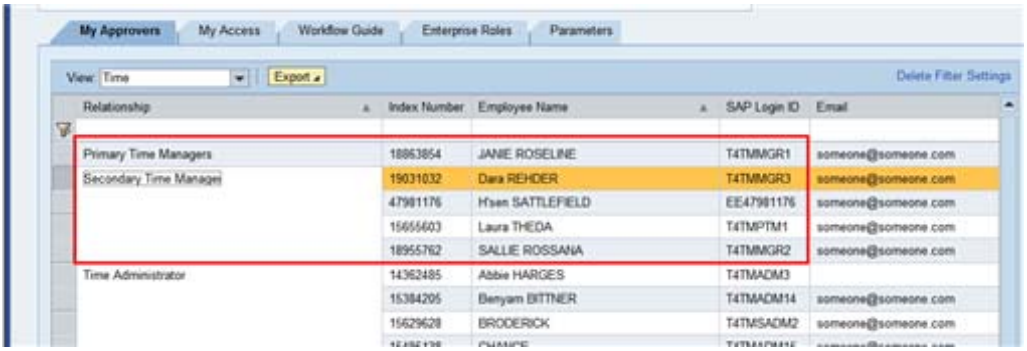
1. To find out who are your assigned Time Manager(s) and Time Administrator(s) click on the User Map link.

User or Employee Search



2. All managers and administrators assigned to you are listed in the My Approvers table, to view the managers and administrators associated with time, select Time from the View drop-down menu.

User or Employee Search



3. The Time Manager(s) and Administrators are listed. Your primary manager is JANE ROSELINE who has assigned four secondary time managers.

Next, we will be demonstrating how to create a request for Special Leave without pay.

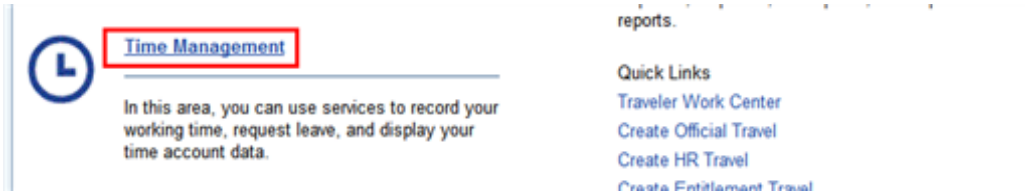
4. Start the transaction using the menu path:
Employee Self-Service SM>Time Management>Create Leave Request

User Map - Umoja training portal - T2J - Windows Internet Explorer



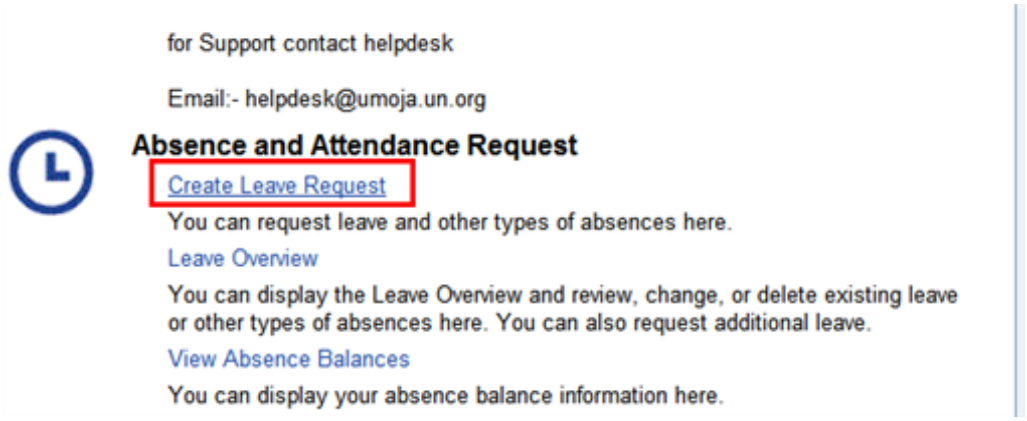
5. Click on the Employee Self-Service SM tab.

Employee Services



6. Click on the Time Management link.

Time Management



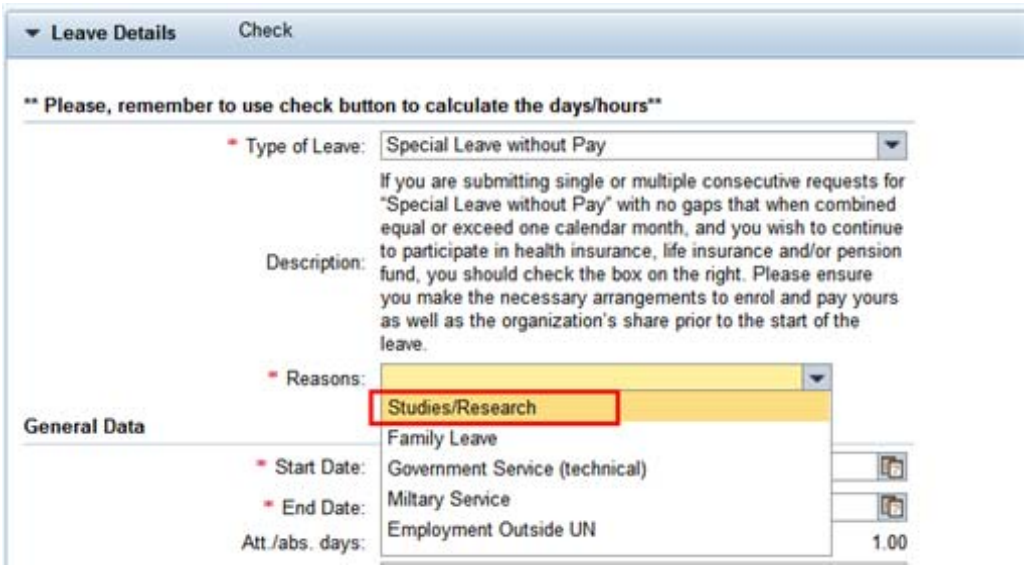
7. Click on the Create Leave Request link.

Humam EVERY - Leave Request: New



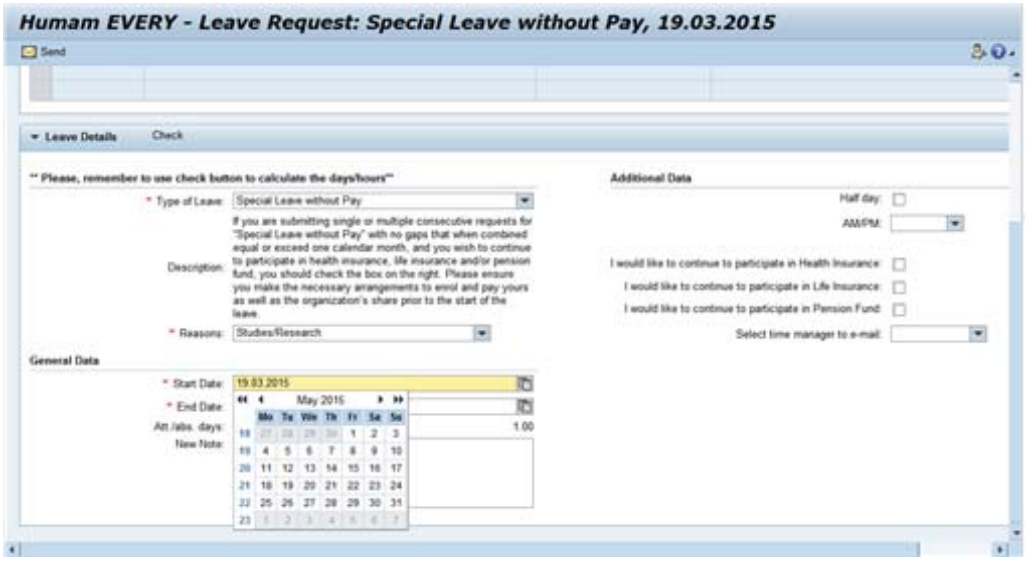
8. Select "Special Leave without Pay" from the list of options.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



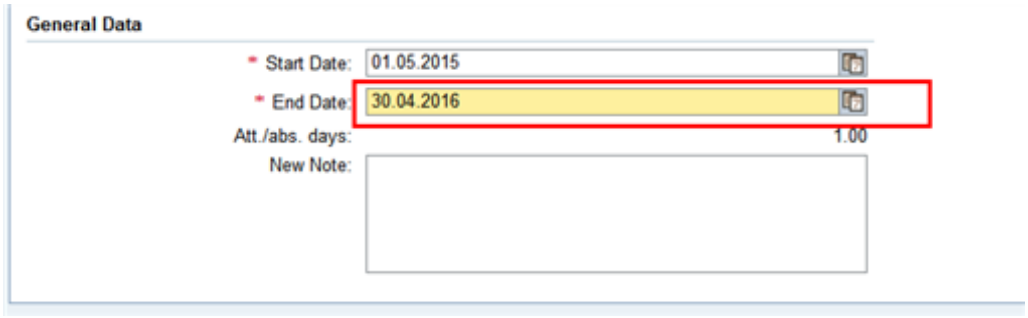
9. Select "Studies/Research" as the reason for the leave from the list of options.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



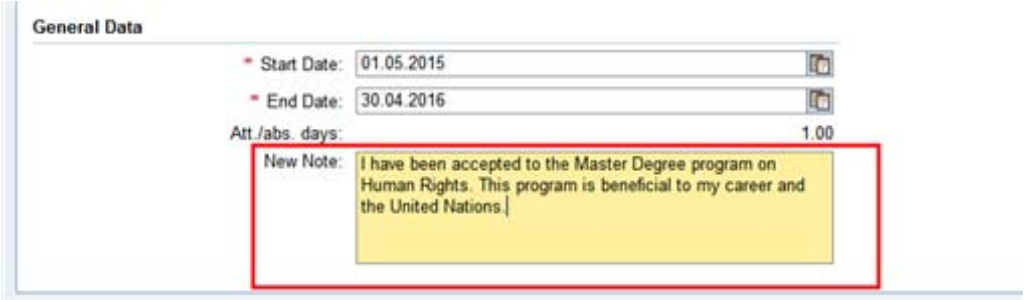
10. Select the date the leave is to start. Dates can be selected from the calendar by clicking on the Calendar icon or entering directly into the field using the DD.MM.YYYY format. In this demonstration, select 1 May 2015 from the calendar.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



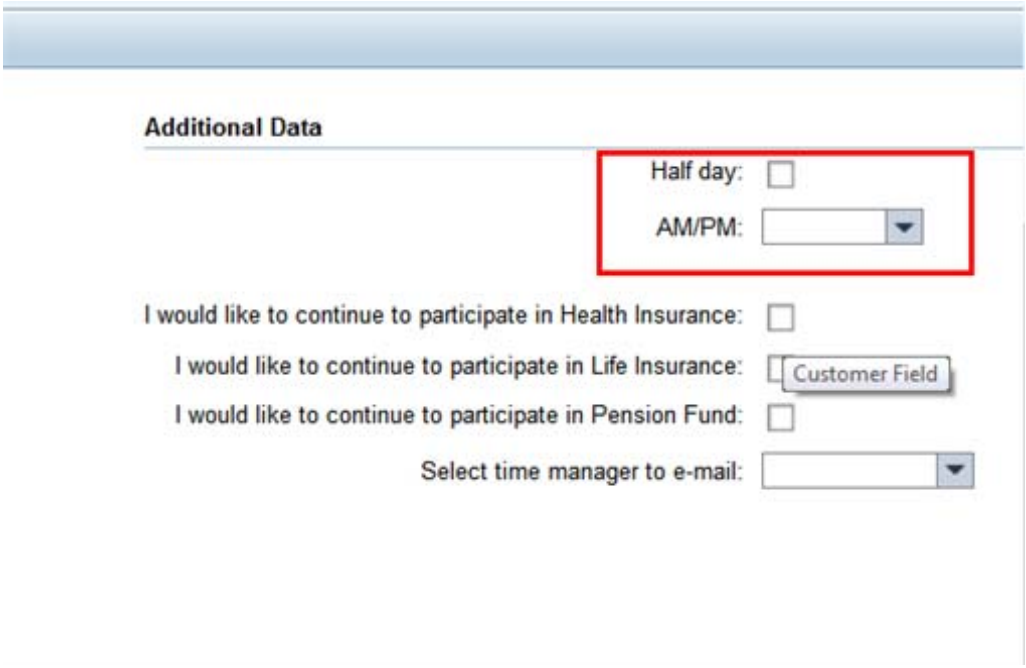
11. Select the date the leave is to end. Dates can be selected from the calendar by clicking on the Calendar icon or entering directly into the field using the DD.MM.YYYY format. In this demonstration, enter 30 April 2016.

Humam EVERY - Leave Request:Special Leave without Pay, 19.03.2015



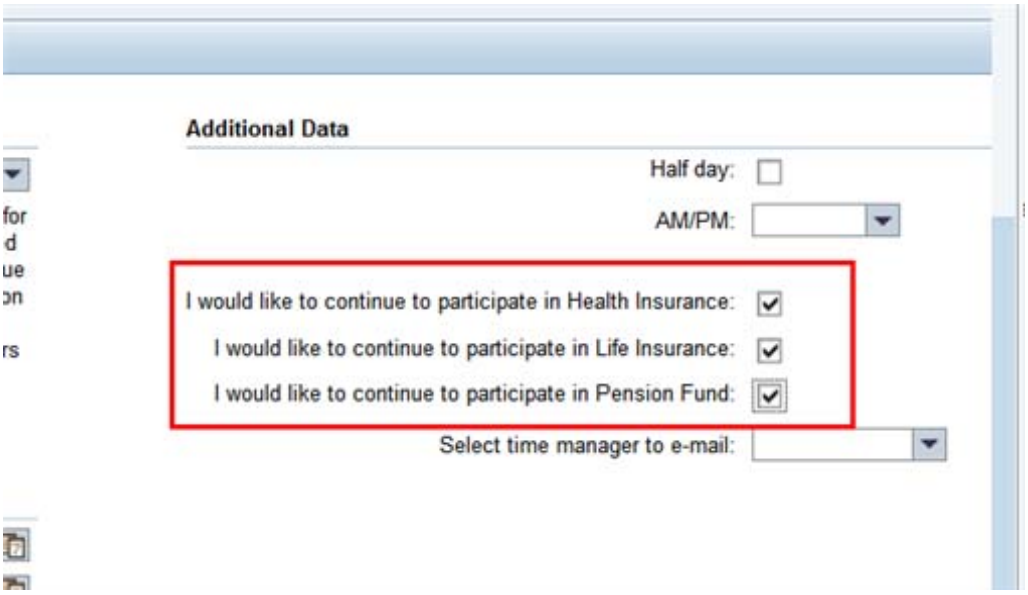
12. You may add remarks or comments in the New Note box, for example we added "I have been accepted to the Master Degree program on Human Rights. This program is beneficial to my career and the United Nations.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



13. You can request a half day leave by placing a checkmark in the half day field and selecting whether you are taking the AM or PM off. By default the range of dates are full days, if you click on half days the range of dates will be half days. In this example, the box will not be checked as we are requesting 251 full days.

Humam EVERY - Leave Request:Special Leave without Pay, 19.03.2015

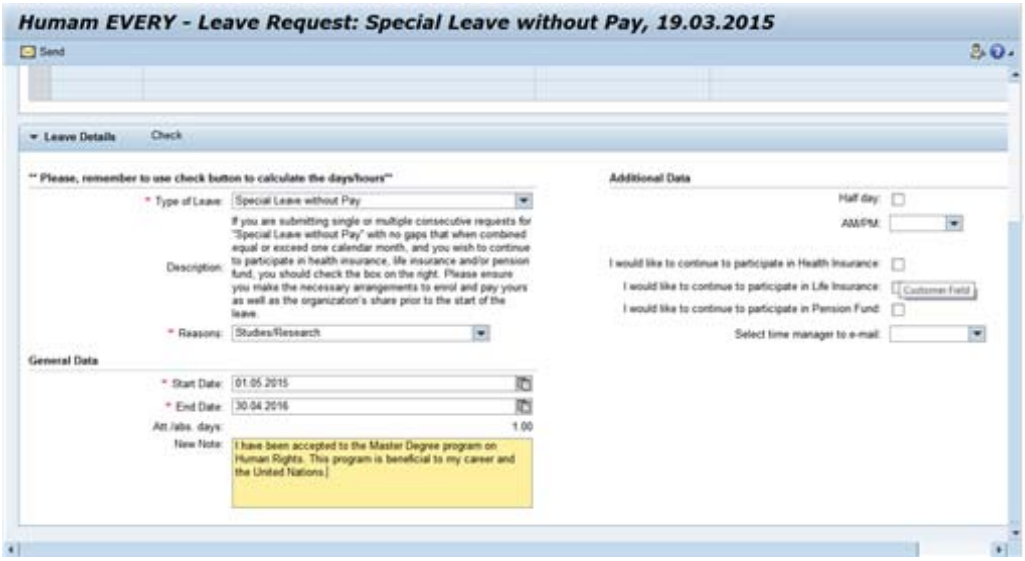


14. If your request for leave is longer than 30 days and you wish to continue to participate in the insurance plans and pension fund, place a check mark next to one or more options.

- I would like to continue to participate in Health Insurance
- I would like to continue to participate in Life Insurance
- I would like to continue to participate in Pension Fund

In this demonstration, we chose to continue to participate in all the options.

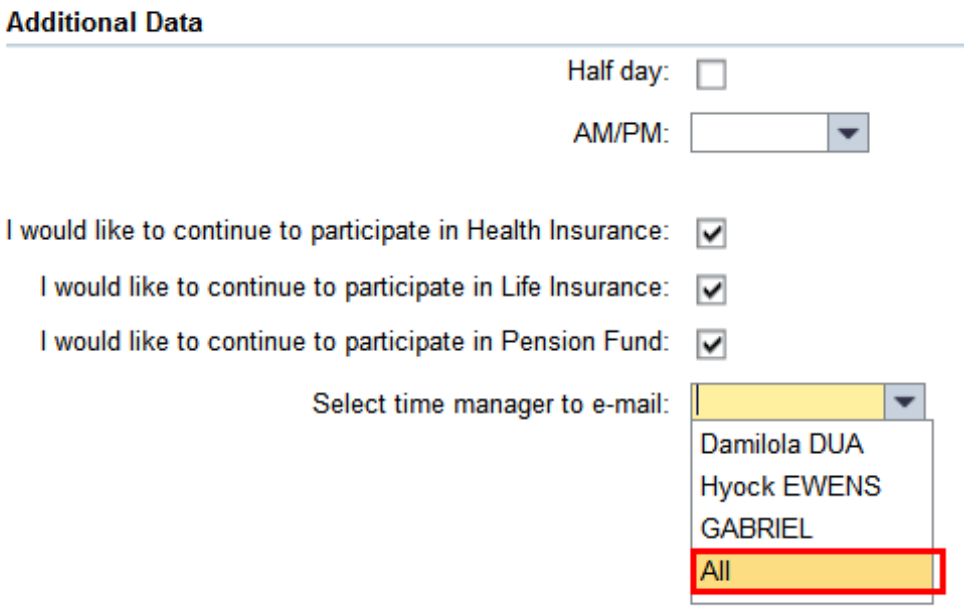
Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



If you choose not to participate in the continuation of benefits at the time of the request, and you change your mind when your leave has started, you will not be allowed to participate in these benefits.

Selecting these options in ESS does not automatically enrol you in the continuation of benefits. You must also contact the Benefits and Pension offices to make the necessary arrangements to enrol and pay your share and the organizations share prior to the start of the leave.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



15. Select your secondary time manager from the list of managers who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

The list may be blank if your primary manager has not delegated this responsibility.

Your primary time manager will automatically receive notification of your leave request even if s/he has delegated the time approval function to a secondary manager.

If they have delegated the time responsibility to a secondary time manager, your secondary manager will not be notified of the request unless they are selected from the list of time managers.

Humam EVERY - Leave Request: New



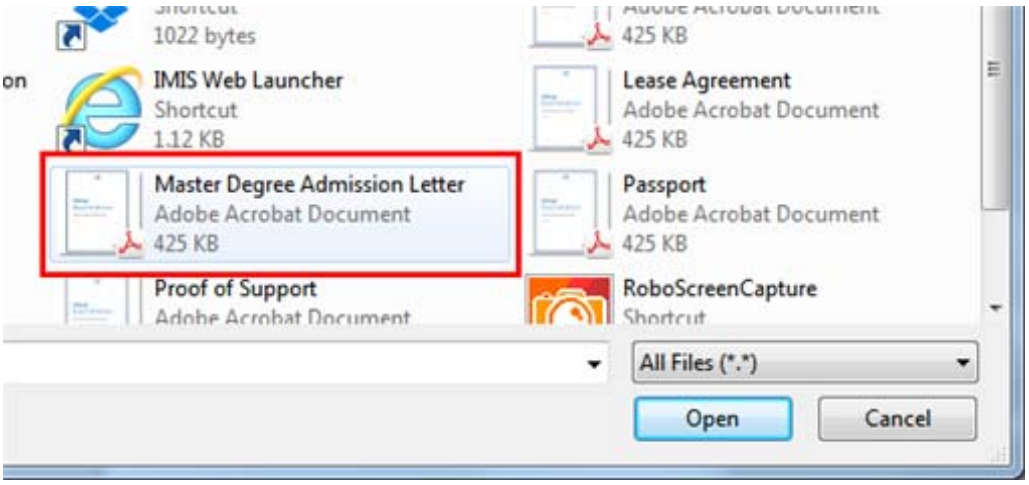
16. Click on the Add button to attach all required documents. In this scenario, the staff member is taking leave to pursue a masters degree so it is necessary to attach the letter of admission to the masters program.

Upload New Attachment



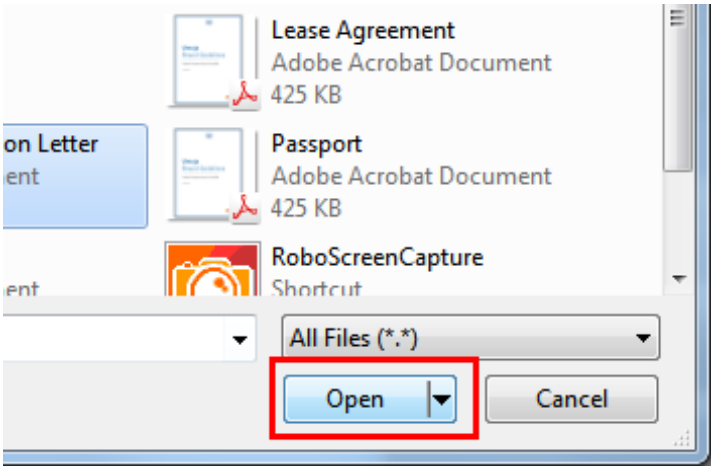
17. Click on the Browse... button.

Choose File to Upload



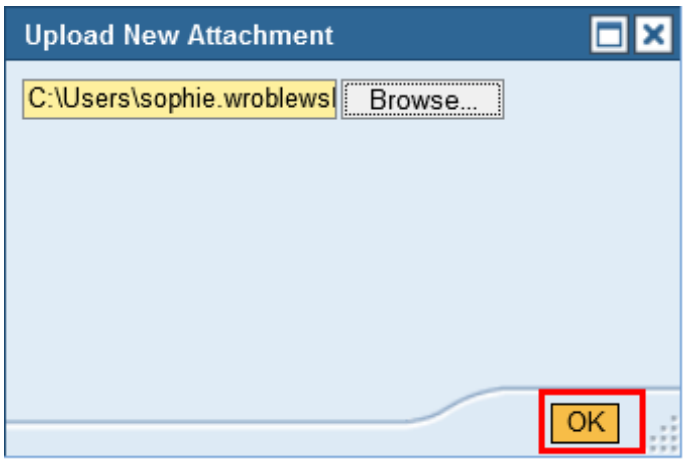
18. Select the document to attach.

Choose File to Upload



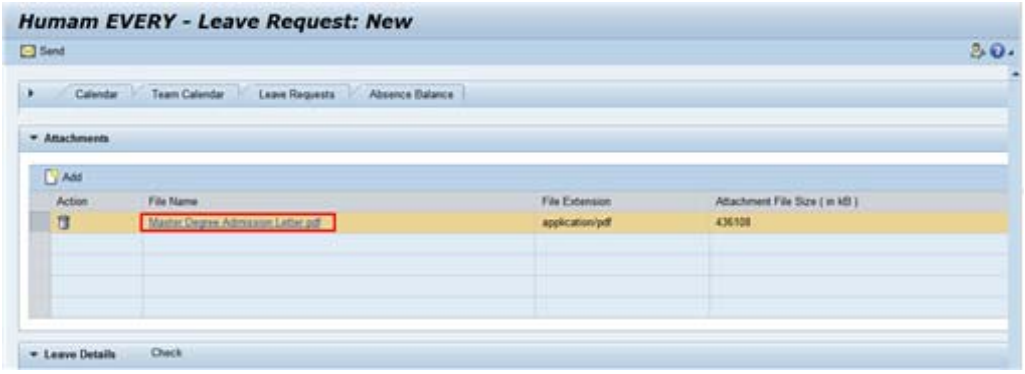
19. Click on the Open button.

Upload New Attachment



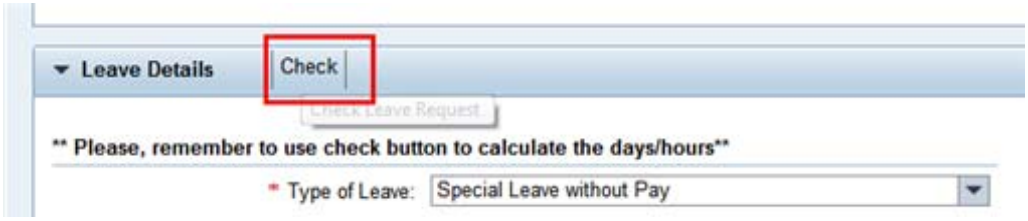
20. Click on the OK button. Next, scroll down to the Leave Details section.

Humam EVERY - Leave Request: New



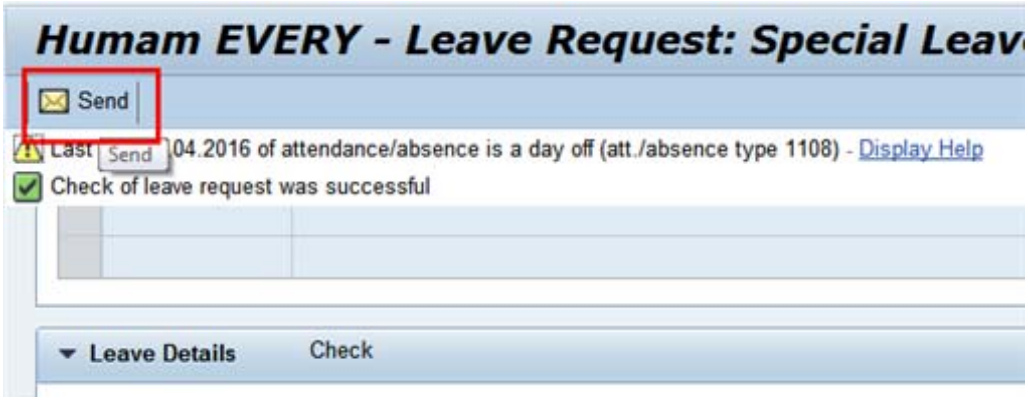
21. The attached document(s) appears in the list.

Humam EVERY - Leave Request: Special Leave without Pay, 19.03.2015



22. Click on the Check button. This will check your request against any other requests you have submitted and your leave balances.

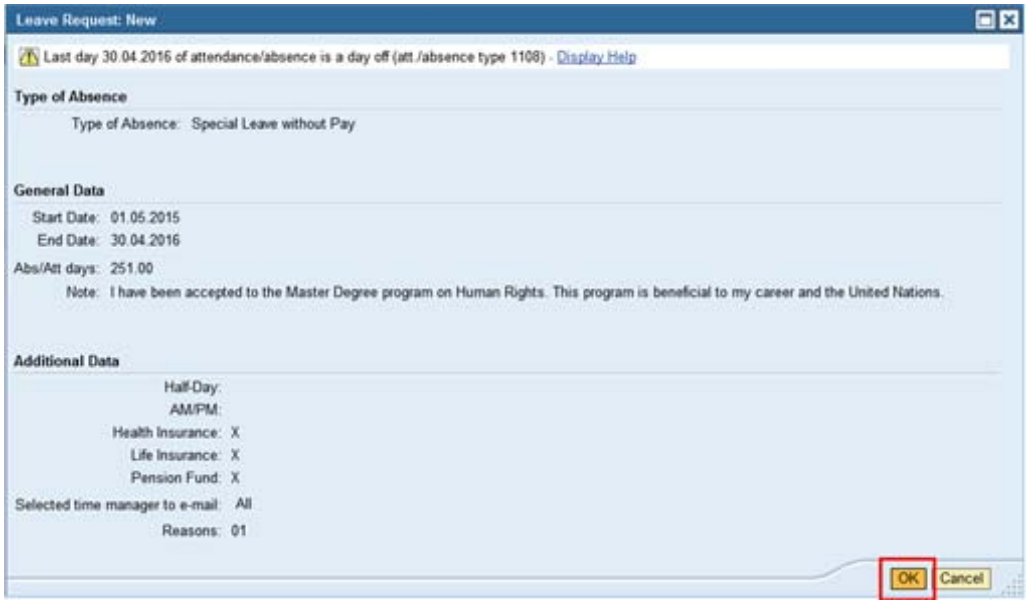
Humam EVERY - Leave Request: Special Leave without Pay, 01.05.2015-30.04.2016



23. Click on the Send button. You will be asked to verify the information you entered for the request.

A message will appear in at the top of the screen indicating whether the check was successful or there are conflicts and the total Att./abs day will be calculated.

Leave Request: New



24. Verify the information (dates, note, calculation of days and managers who will be notified) and click on the OK button. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

The calculated Abs/Att days does not include weekends and UN holidays.

Humam EVERY - Leave Request: New



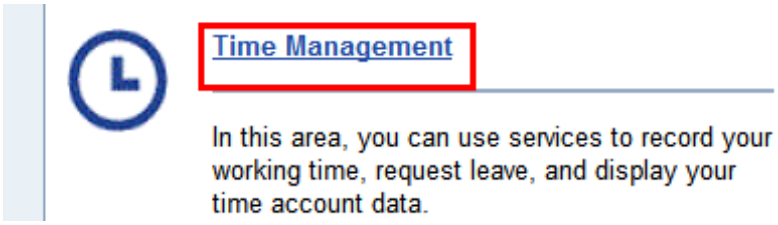
25. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

Create Leave Request - Umoja qa portal - Q3J - Windows Internet Explorer



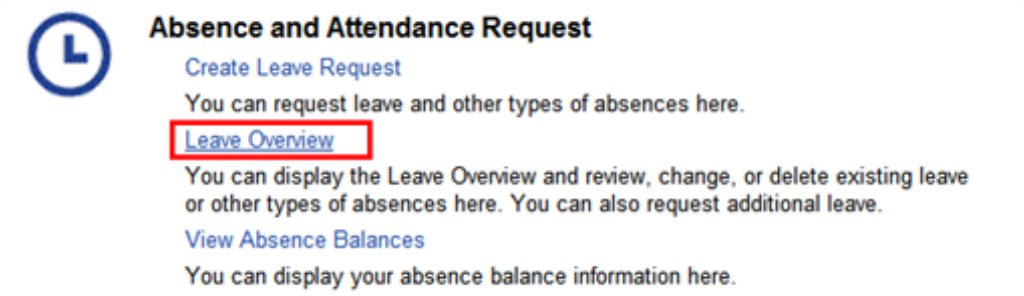
26. Click on the **Overview** tab.

Employee Services



27. Click on the **Time Management** link.

Time Management



28. Click on the Leave Overview link.

Leave Overview



29. Your request has been sent to your time manager and is shown in the Leave Requests as sent. Your Primary time manager will appear in the table but the request will also be sent to any secondary manager you selected in the steps above and to the HR Partner . The status will change when the HR Partner has approved the request.

The Att/abs days reflected in the table include weekends and UN holidays.

Purpose

This procedure is used by the ***Staff Member*** to submit requests for paternity leave.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

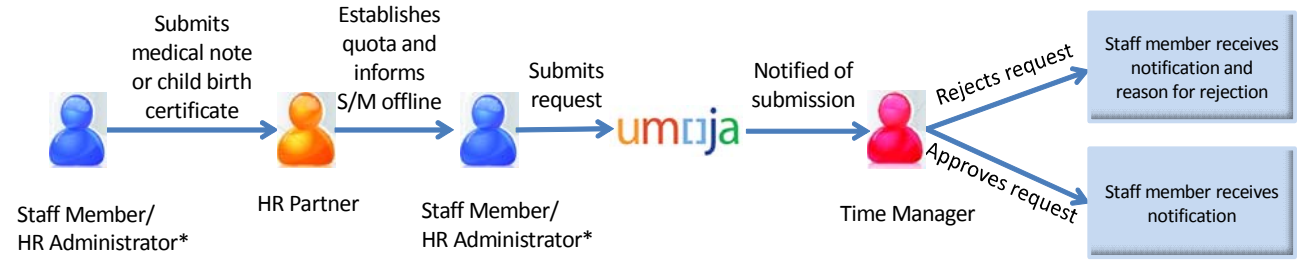
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.



*** HR Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**

1. The ***Staff member*** submits offline to the ***HR Partner*** a medical note with the child's expected delivery date or the child's birth certificate.
2. The ***HR Partner*** checks eligibility and establishes paternity leave quota.

3. The ***Staff Member*** submits request for paternity leave through Umoja Employee Self-Service.
4. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** approves the request, the request is recorded in ECC and a notification is sent to the ***staff member.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Pre-requisites

A certificate from a licensed medical doctor or midwife indicating the expected date of delivery or the official certificate of birth.

Objectives

As part of the demonstration, we will show you:

1. How to check your paternity leave balances.
2. How to submit a paternity leave request for full and half days.
3. How to ensure your secondary time manager(s) receive notification of your request.
4. How to check the status of your request.
5. How to check your new balances leave balances, after your request has been approved.

Scenario

A ***staff member*** submits offline a certificate of pregnancy with an expected delivery date of 20 April 2015 and requests the HR Partner to establish a paternity leave quota starting on 20 April 2015. Once the HR partner approves the quota, the staff member submits a request for paternity leave for 16 days from 20 April 2015 to 11 May 2015.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Create Leave Request

Procedure

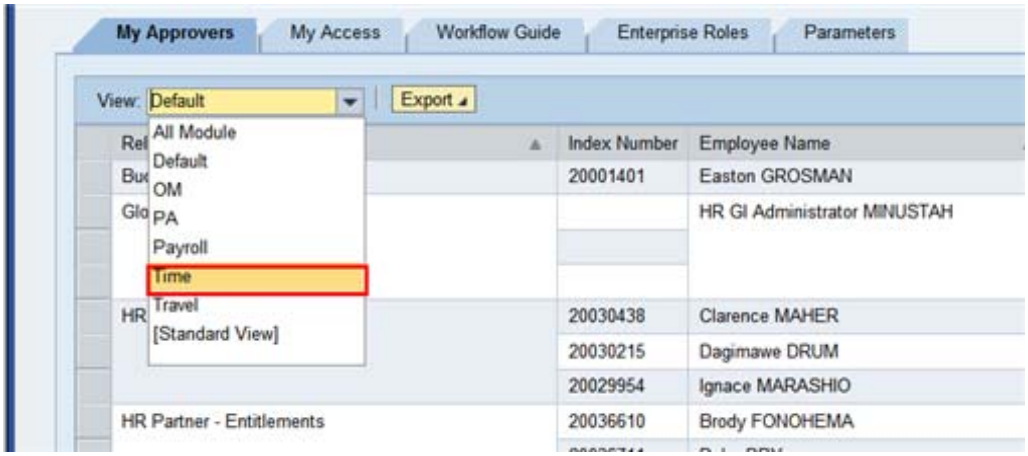
Before we submit a leave request, we will be showing you how to check the time managers and time administrators assigned to you. Every staff member is assigned a primary time manager who is responsible for approving your time related requests. Your primary time manager can delegate the role of time approver to one or more secondary time managers.

Welcome to Umoja



1. To find out who are your assigned Time Manager(s) and Time Administrator(s) click on the User Map link.

User or Employee Search



2. All managers and administrators assigned to you are listed in the My Approvers table, to view the managers and administrators associated with time, select Time from the View drop-down menu.

User and Employee Search



3. The Time Manager(s) and Administrators are listed. Your primary manager is GABRIEL who has assigned two secondary time managers.

Next, we will be demonstrating how to create a paternity leave. It is important to remember that leave requests taken consecutively in days/half days or non-consecutively must be entered separately.

4. Start the transaction using the menu path:

Employee Self-Service SM>Time Management>Create Leave Request

User Map - Umoja qa portal - Q3J - Windows Internet Explorer



5. Click on the Employee Self-Service SM tab.

Employee Services



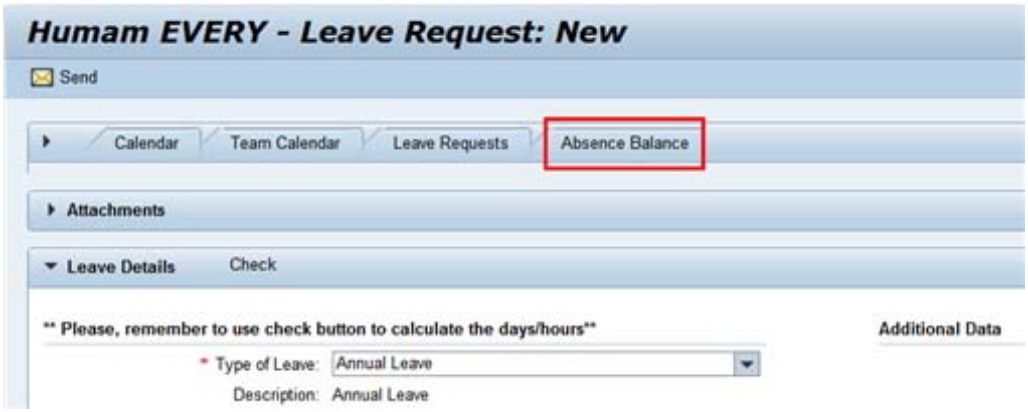
6. Click on the Time Management link.

Time Management



7. Click on the Create Leave Request link.

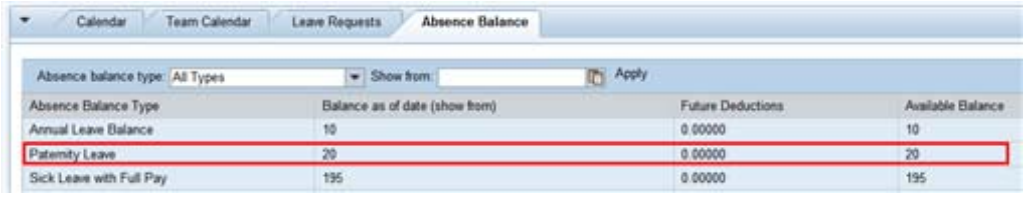
Humam EVERY - Leave Request: New



8. Click on the Absence Balance tab.

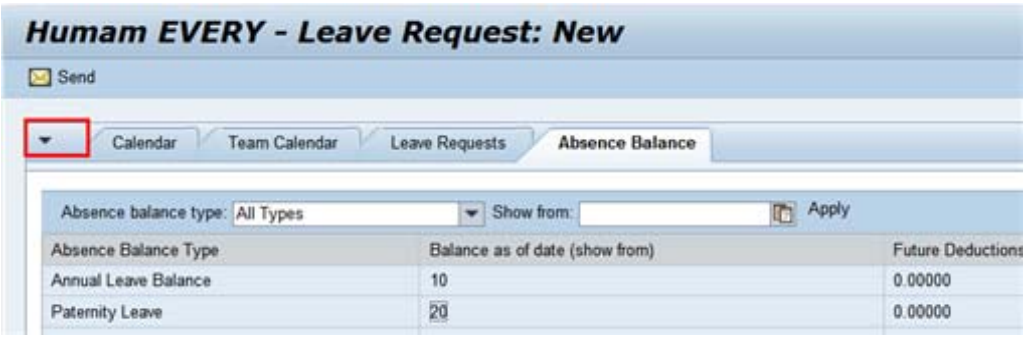
Most leave types have a quota (maximum amount of time) that can be taken as leave. You are advised to check your total balance at the time of the request so that you know how much time you can request.

Humam EVERY - Leave Request: New



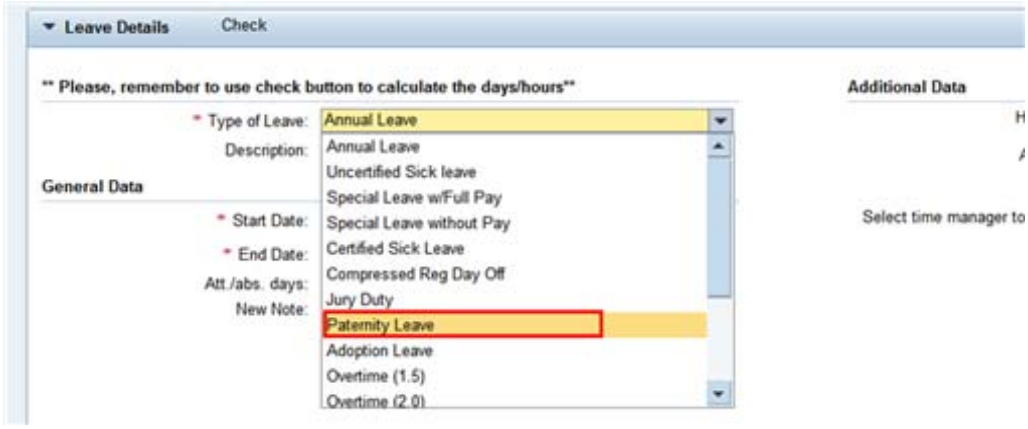
9. Your available balances will be displayed in the Available Balance column. Normally, Paternity Leave will have a zero (0) balance until the applicable documents (medical note or child's birth certificate) are presented to the HR Partner and they establish the quota. In this demonstration, we know the quota has been established because we see a balance of 20, so we can now proceed with the request.

Humam EVERY - Leave Request: New



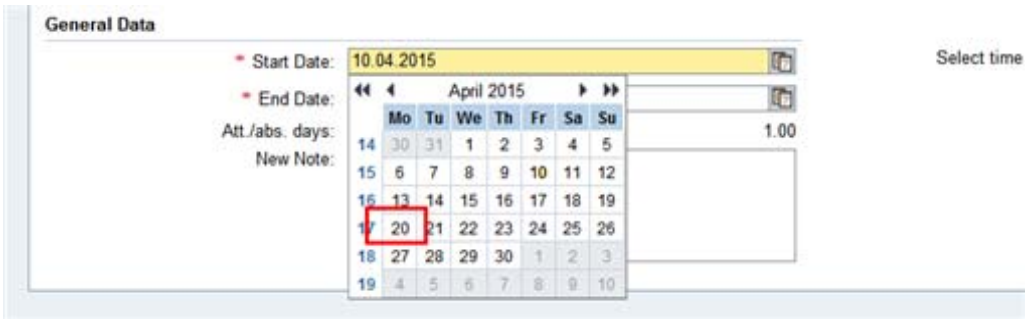
10. Click on the collapse arrow to close the Absence balance section.

Humam EVERY - Leave Request: New



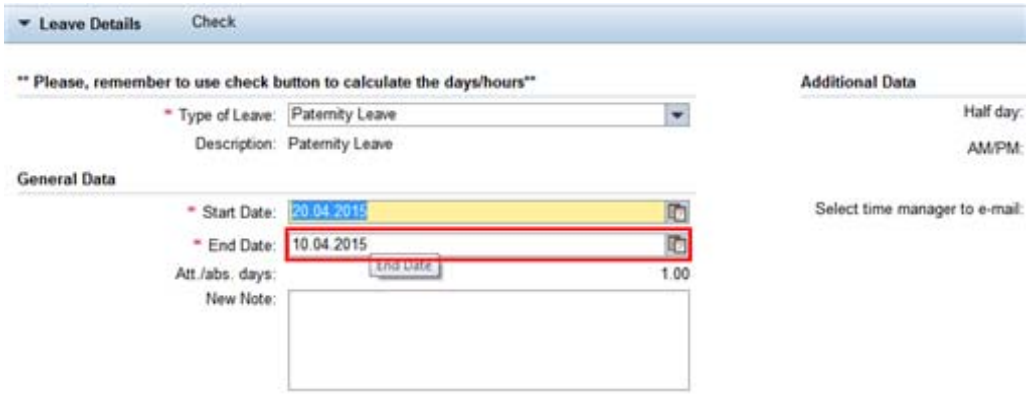
11. Select Paternity leave from the list of leave types.

Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



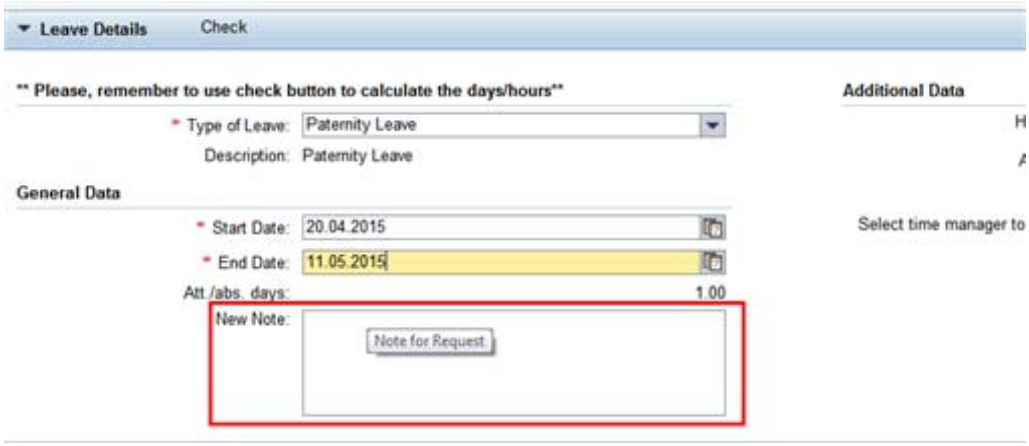
12. Select the date the leave is to start. Dates can be selected from the calendar by clicking on the Calendar icon or entering directly into the field using the DD.MM.YYYY format. In this case, select 20 May from the calendar.

Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



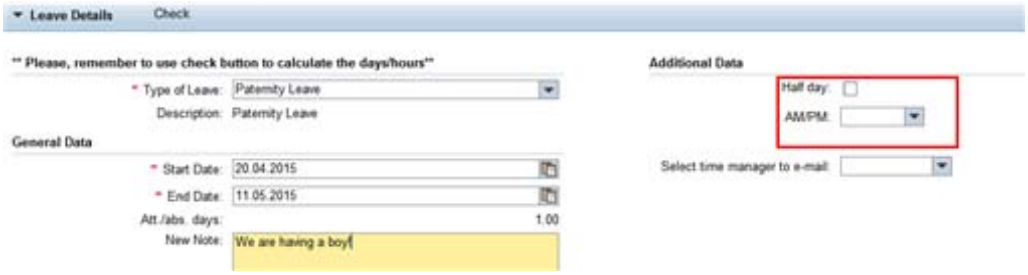
13. Select or enter the date the leave is to end. In this demonstration we entered the end date of 11 May 2015.

Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



14. You may add remarks or comments in the New Note box, for example we added "We are expecting a boy!"

Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



15. You can request a half day leave by placing a checkmark in the half day field and selecting whether you are taking the AM or PM off. By default the range of dates are full days, if you click on half days the range of dates will be half days.

Remember, half day and full day requests must be entered as two separate requests..

Humam EVERY - Leave Request: Paternity Leave, 10.04.2015

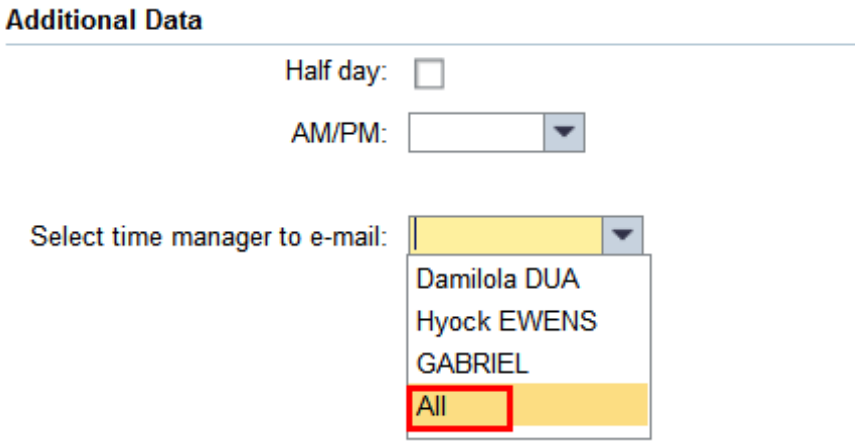


16. Click on the drop-down arrow to view a list of your primary and secondary time managers. The list may be blank if your primary manager has not delegated this responsibility.

Your primary time manager will automatically receive notification of your leave request even if s/ he has delegated the time approval function to a secondary manager.

If they have delegated the time responsibility to a secondary time manager, your secondary manager will not be notified of the request unless they are selected from the list of time managers.

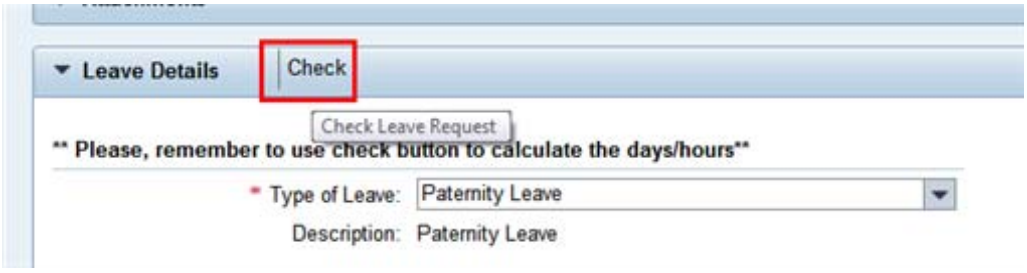
Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



17. Select your secondary time manager from the list of managers who should receive notification of your request or select ALL and all the secondary time managers will receive a notification.

Next, we are going to have the system check your request against your leave balances

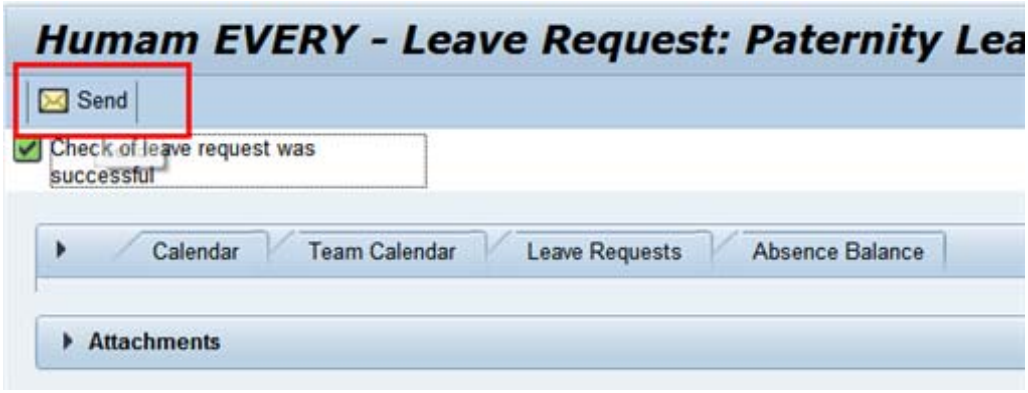
Humam EVERY - Leave Request: Paternity Leave, 10.04.2015



18. Click on the Check button. This will check your request against any other requests you have submitted and your leave balances.

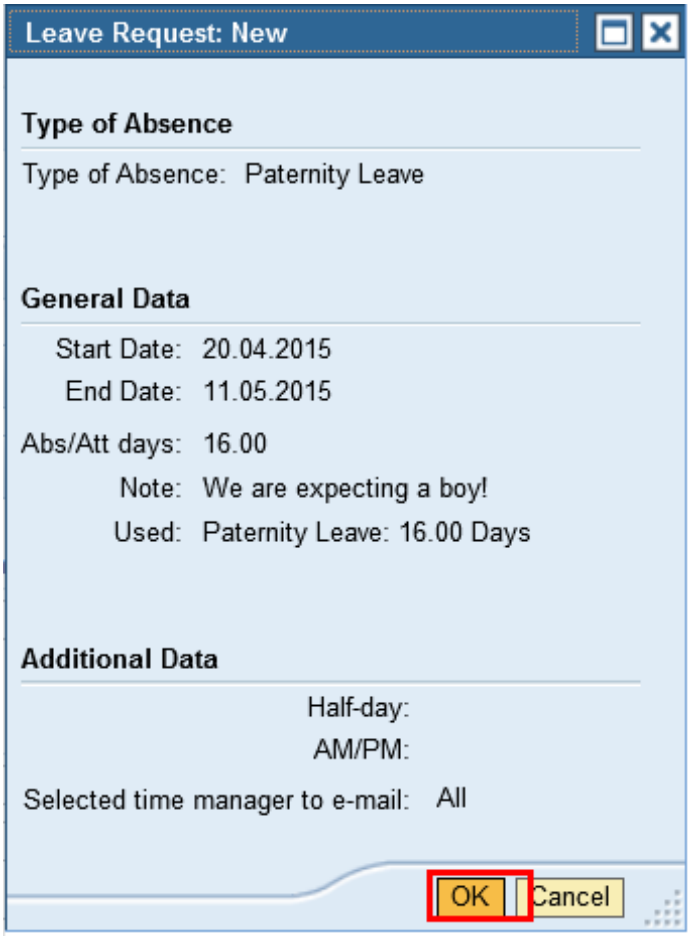
A message will appear in at the top of the screen indicating whether the check was successful or there are conflicts and the total Att./abs day will be calculated.

Humam EVERY - Leave Request: Paternity Leave, 20.04.2015-11.05.2015



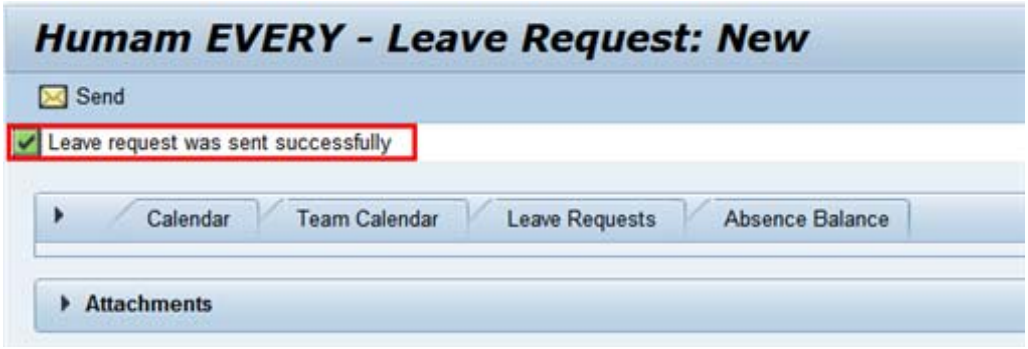
19. Click on the Send button. You will be asked to verify the information you entered for the paternity request.

Leave Request: New



20. Verify the information (dates, note, calculation of used dated and managers who will be notified) and click on the OK button. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

Humam EVERY - Leave Request: New



21. Your request will be sent to your primary time manager and any secondary time manager you selected earlier.

Humam EVERY - Leave Request: New



22. Click on the Leave Requests tab.

Humam EVERY - Leave Request: New



23. Your request has been sent to your time manager and is shown in the Leave Requests as sent. The status will change when approved. Your Primary time manager will appear in the table but the request will also be sent to any secondary manager you selected in the steps above.

Purpose

This procedure is used by the ***Staff Member*** to submit a request for maternity leave.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

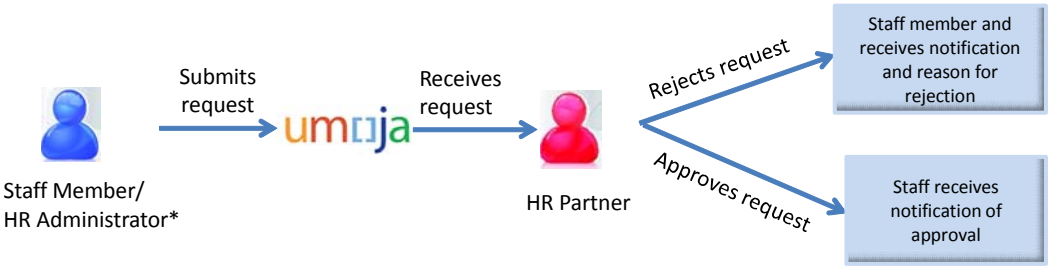
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.



*** HR Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**

1. The ***Staff Member*** submits request for maternity leave through Umoja Employee Self-Service.
2. ***HR Partner*** verifies and reviews the request through the Umoja Approver Work Centre.

a. If the ***HR Partner*** approves the request, the request is recorded in ECC and a notification is sent to the ***staff member.***

b. If the ***HR Partner*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Pre-requisites

A certificate from a licensed medical doctor or midwife indicating the expected date of delivery and that the ***staff member*** is fit to continue to work until a specified date within the six week period before the anticipated delivery date.

Objectives

As part of the demonstration, we will show you:

1. How to submit a request for maternity leave.

Scenario

A ***staff member*** submits a request for maternity leave. The expected delivery date is 20 April 2015.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Time Management> Maternity Leave

Procedure

1. Start the transaction using the menu path:

Employee Self-Service SM>Time Management>Maternity Leave

Welcome to Umoja



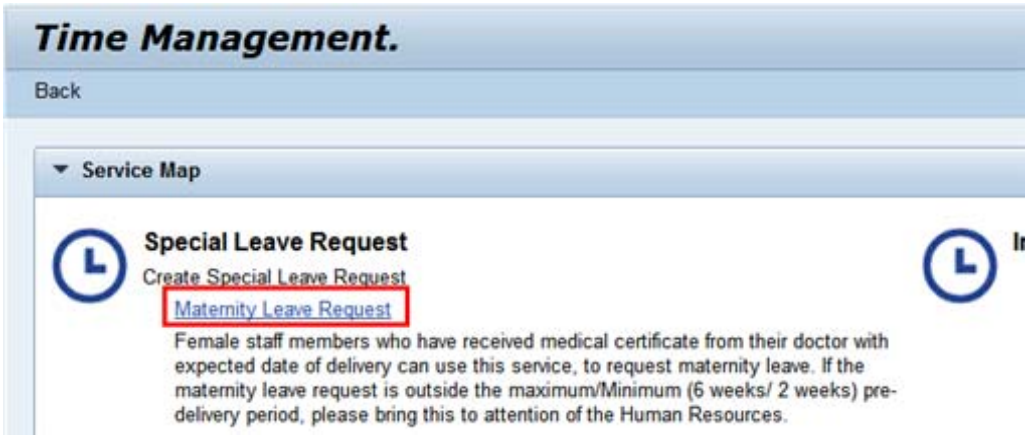
2. Click on the Employee Self-Service SM tab.

Employee Services



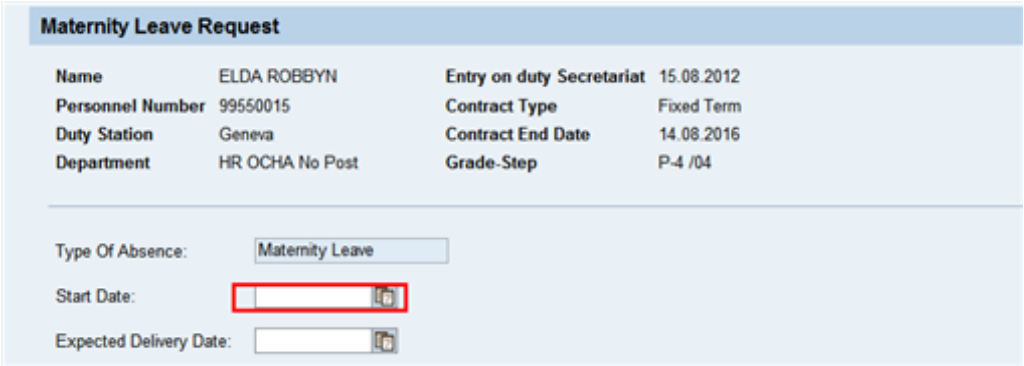
3. Click on the **Time Management.** link.

Time Management.



4. Click on the Maternity Leave Request link.

Fill Out Form Maternity Leave - UN

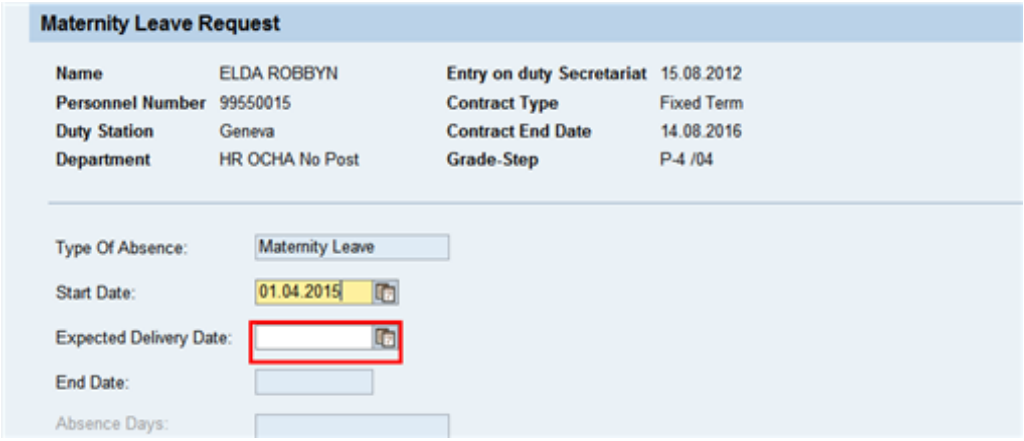


5. Select or enter the date you will be going on Maternity leave. In this demonstration, the staff member plans to continue to work until 1 April 2015.

The start date cannot be less than two (2) weeks prior to the expected date of birth.

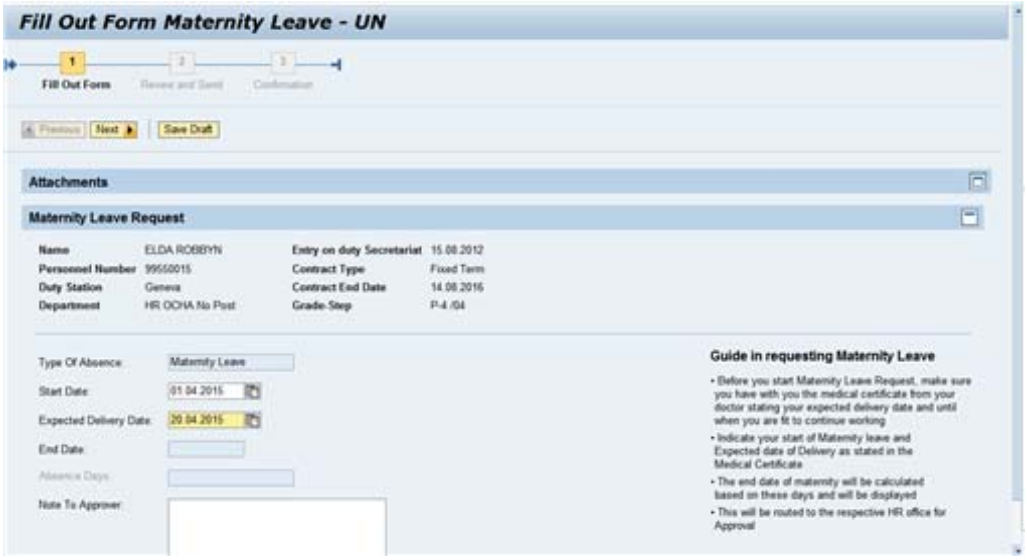
If you plan to take leave between 6 and 2 weeks prior to your delivery date, a doctor's note certifying your ability to continue work until this time is required.

Fill Out Form Maternity Leave - UN



6. Select or enter the expected delivery date. In this demonstration, enter 20 April 2015.

Fill Out Form Maternity Leave - UN



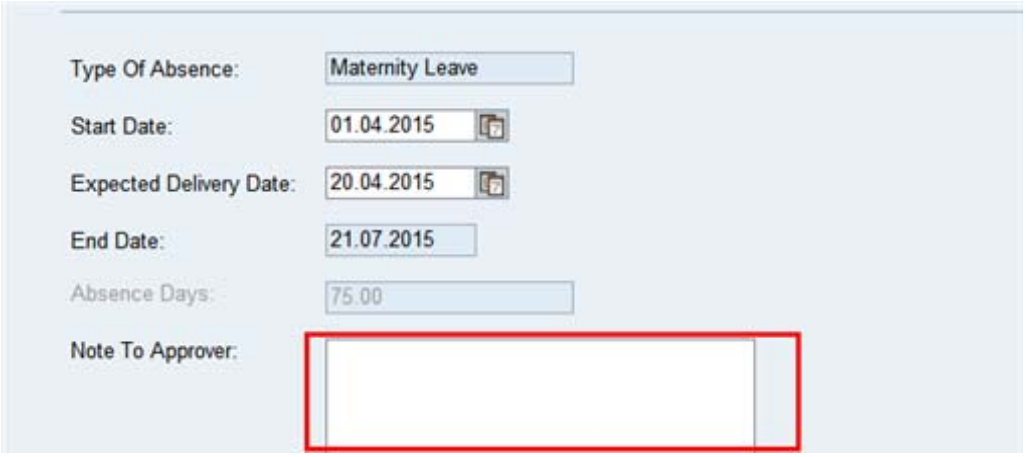
7. Press the Enter key to calculate the End Date and number of absence days.

Fill Out Form Maternity Leave - UN



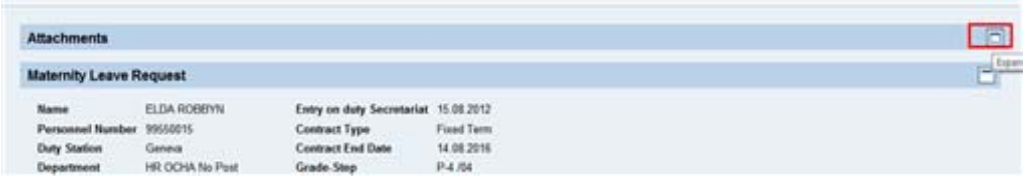
8. The End date and number of absence days is automatically calculated.

Fill Out Form Maternity Leave - UN



9. Enter additional information for the HR Partner in the Note To Approver text box. In this demonstration "We are expecting twins" was entered.

Fill Out Form Maternity Leave - UN



10. Click on the Expand tray button in the Attachments section.

Fill Out Form Maternity Leave - UN



11. Click on the Expand tray button in the Attachment section.

Fill Out Form Maternity Leave - UN



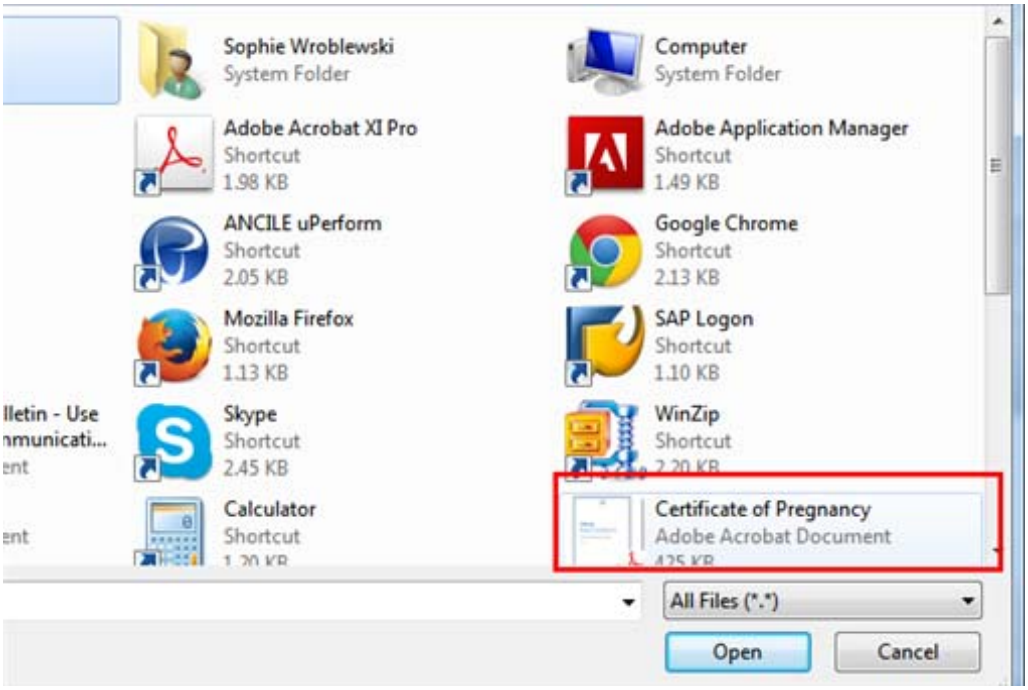
12. Click on the Add Attachment button.

Fill Out Form Maternity Leave - UN



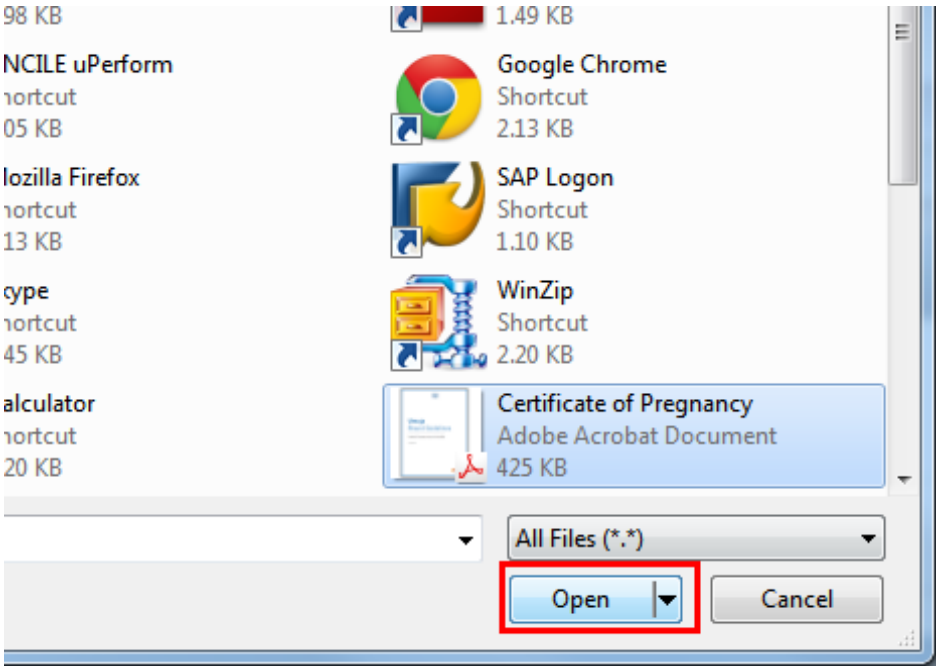
13. Click on the Browse... button.

Choose File to Upload



14. Select the document to attach. You should upload PDF documents only.

Choose File to Upload



15. Click on the Open button.

Fill Out Form Maternity Leave - UN



16. Click on the Upload button.

Fill Out Form Maternity Leave - UN



17. Select the document you just uploaded.

Fill Out Form Maternity Leave - UN



18. Click on the Next button to review your entries.

Review Form Maternity Leave - UN



19. Review the information entered, if you need to make any corrections click on the Previous button.

Review Form Maternity Leave - UN



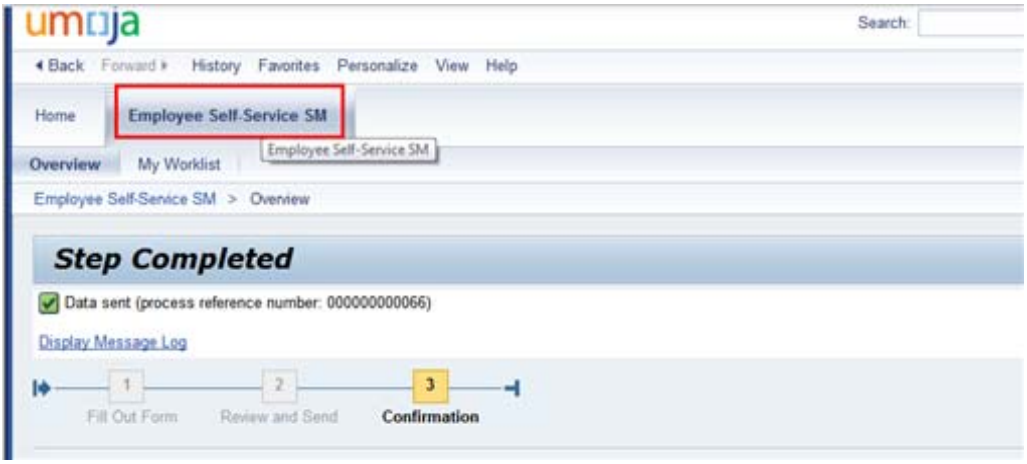
20. Click on the Send button.

Step Completed



21. A message appears indicating whether the request was sent successfully.

Step Completed



22.

Click on the **Employee Self-Service SM** tab to return to the Employee Self-Service menu.

Purpose

This procedure is used by the ***Staff Member*** to certify their monthly time statement.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.

- ***Staff member*** reviews their monthly time statement through the Umoja Employee Self-Service portal.
- The ***staff member*** certifies and submits their monthly time statement through the Umoja Employee Self-Service.

Pre-requisites

It is very important that you keep an accurate and updated record of attendance for each month so that the report correctly reflects the leave taken and you can easily verify and certify the report.

Objectives

As part of the demonstration, we will show you:

- How to view your monthly time statement.
- How to certify and submit your monthly time statement.
- How to save and print your monthly time statement.

Scenario

At the beginning of each month Umoja sends an automated message to all Staff Members to notify the availability of the current Monthly Time and Attendance Certification for the previous month.

The Staff Member logs in the Employers Self Service Portal , reviews the absence record and, if consistent with the actual attendance, confirms the Monthly Certification.

Menu Path

Employee Self Service SM > Time Management>Certify Monthly Time Summary

Procedure

1. Start the transaction using the menu path:

   Employee Self-Service>Time Management>Certify Monthly Time Summary

Overview - Umoja training portal - T2J - Windows Internet Explorer



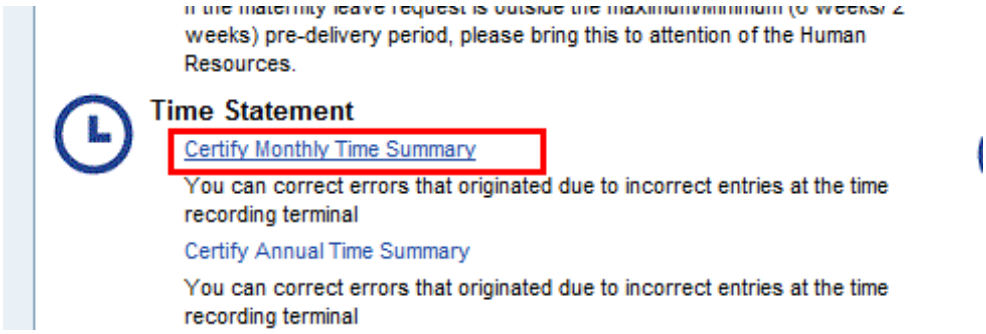
2. Click on the Employee Self-Service SM tab.

Employee Services



3. Click on the Time Management. link.

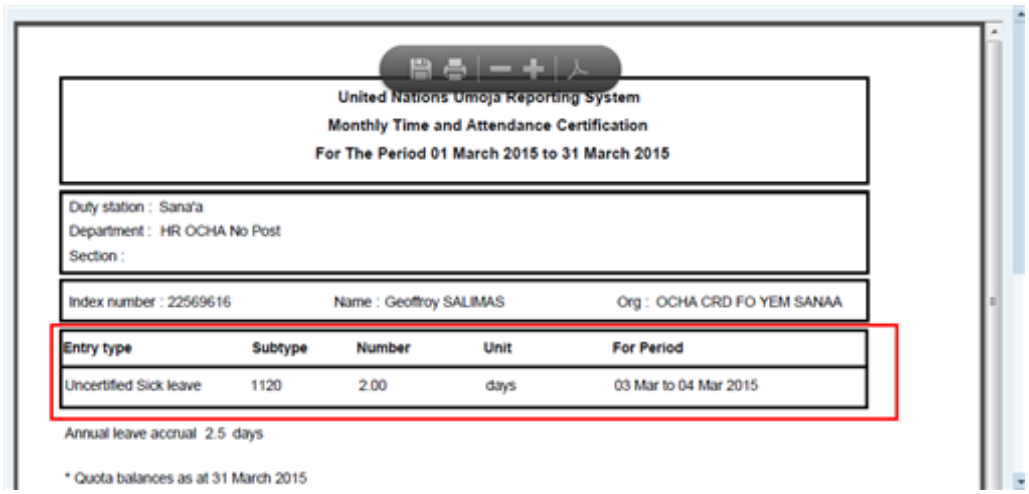
Time Management.



4. Click on the Certify Monthly Time Summary link.

A PDF report will be produced showing the list of absence types taken and the duration of the leave. Please note that this is not a dynamic report and will only show the leave taken as of the date of the generation of the report.

Times Statement Verification Month



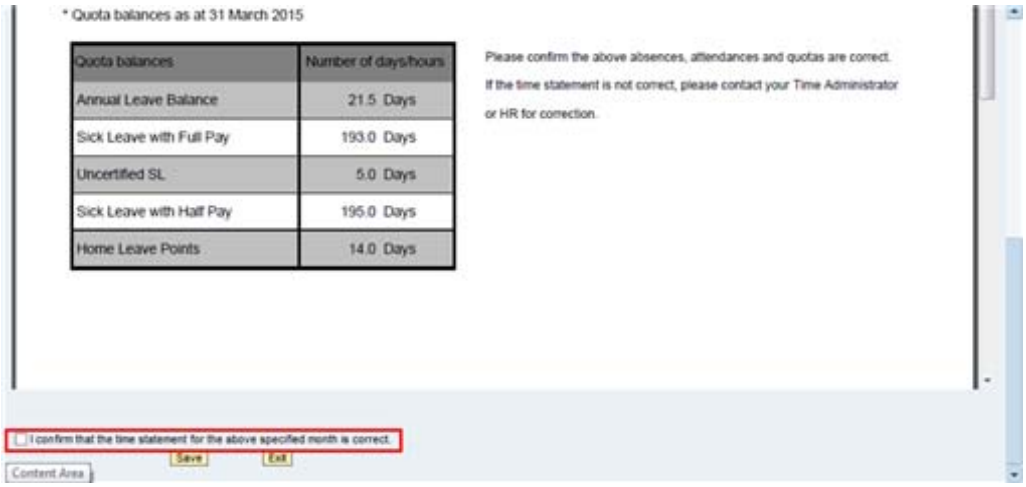
5. Review the Absence record for the month then scroll to the end to the page.

If you identify any discrepancies in the absence record, do not certify the Monthly Time and Attendance Certificate and take the following action(s):

- **Missing absence record:** close the page and submot an absence request for the type of absence and days taken.
- **Leave not utilized or curtailed:**If the leave was already approved, follow the instructions for deleting an approved record. Once your time manager has approved the deletion, you may re-enter the correct leave time taken as a new record and your manager will approve accordingly.

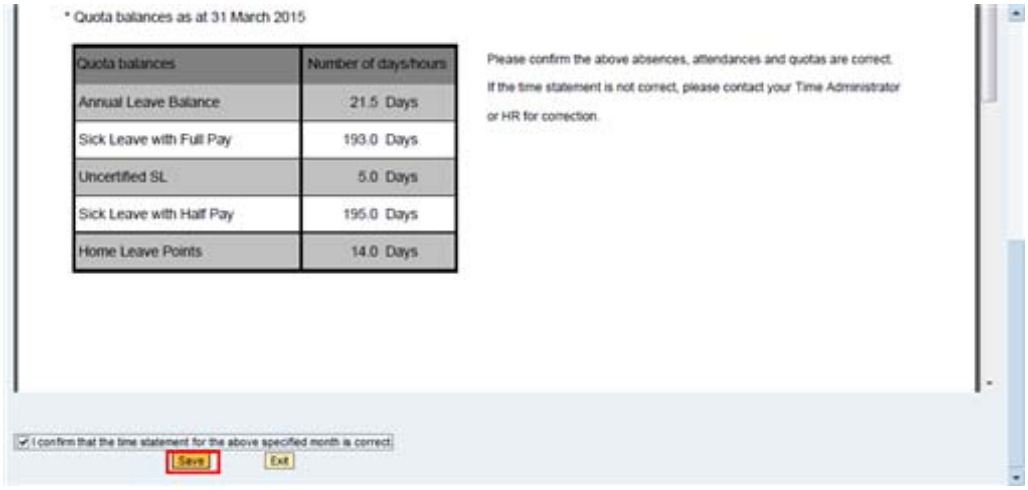
IMPORTANT: whenever you correct any discrepancies (either by adding missing entries or by fixing incorrect data) you will not be able to see the updates in the monthly certification. As indicated earlier, monthly certification reports are generated at the beginning of a month for the previous month. So any corrections made after the report is generated will be viewable in your quota balances but will not be dynamically updated in the monthly report, which will always remain static. That is why it is important to keep your attendance up to date by the end of each month.

Times Statement Verification Month



6. If everything is correct in your Absence Quota balance then select " I confirm that the time statement for the above specified month is correct."

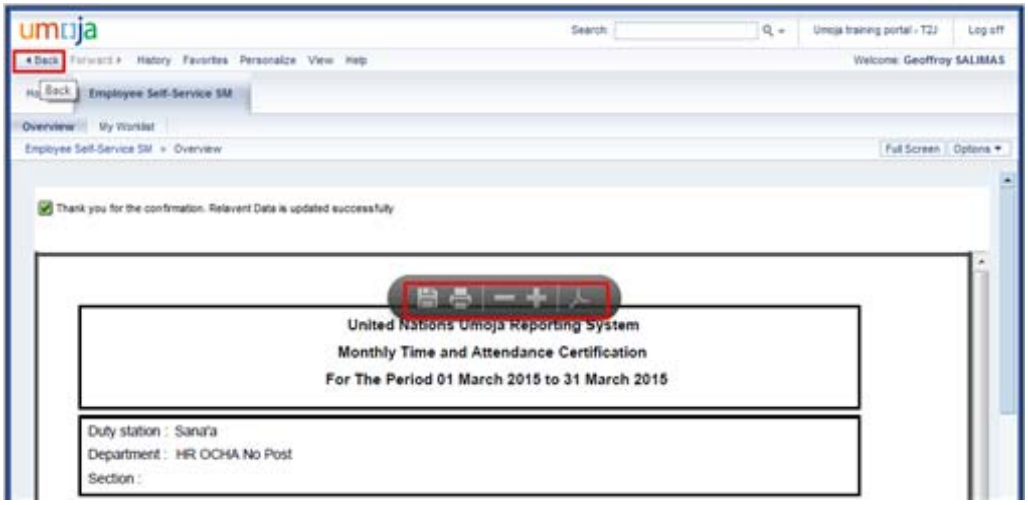
Times Statement Verification Month



7. Click on the Save button to submit your certified Monthly Statement.

The system enables you to save, print and display the Monthly Certification as a PDF document.

Certify Monthly Time Summary - Umoja training portal - T2J - Windows Internet Explorer



8. Click on the Back button to return to the main menu.

Purpose

This procedure is used by the ***Staff Member*** to record their most recent addresses and contact information to their profile. The types of information that should be recorded are:

- **Mailing Address**, address where mail from the United Nations should be sent;
- **Permanent Address,** where your permanent residence is, which may be different than your duty station address;
- **Emergency Contact**, name and contact information for the person who should be notified if an emergency occurs;
- **Duty Station**, address where you will reside while at the duty station, which may be the same as your permanent address;
- **TDY Address (Temporary Duty Assignment)**, address where you will reside during the assignment;
- **Tax Purposes**, address used for tax purposes;
- **Family Address (Prior DS**), address where your family resides.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

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Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.

1. Staff member adds one or more valid addresses and contact information to their profile.
2. Staff member submits the information.
3. The information is saved and appears in the list of addresses.

Pre-requisites

None

Objectives

As part of the demonstration, we will show you:

- How to record your address information in your profile.

Scenario

A ***Staff Member*** has taken a position at another duty station and needs to enter their new address.

Menu Path

- **Employee Self-Service>Personal Information>Addresses**

Procedure

1. Start the transaction using the menu path

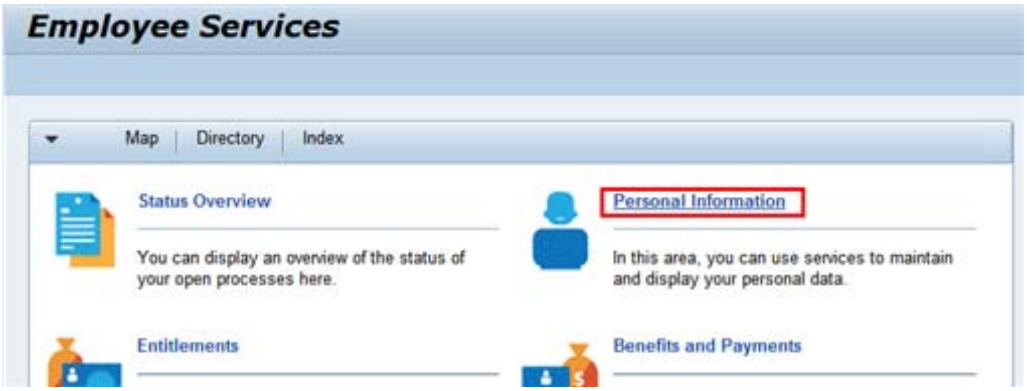
Employee Self-Service SM>Personal Information>Addresses

Overview - Umoja training portal - T2J - Windows Internet Explorer



2. Click on the Employee Self-Service SM tab.

Employee Services



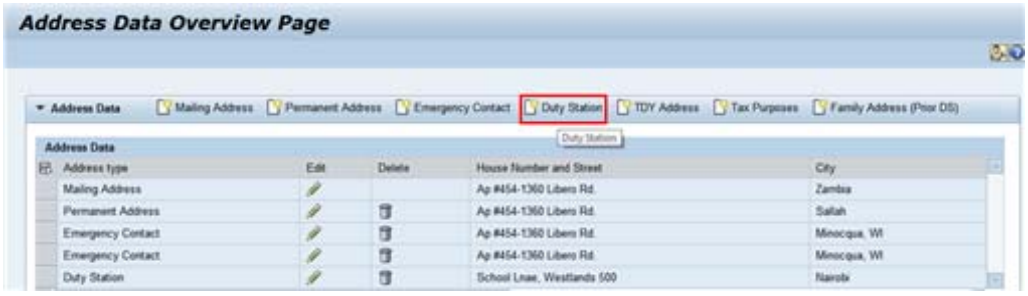
3. Click on the Personal Information link.

Personal Information



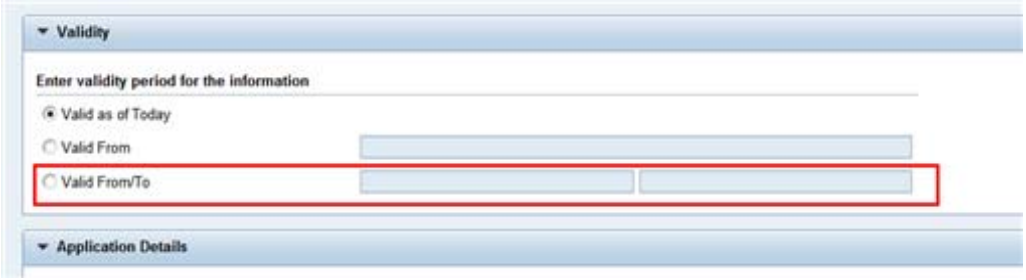
4. Click on the Addresses link.

Address Data Overview Page



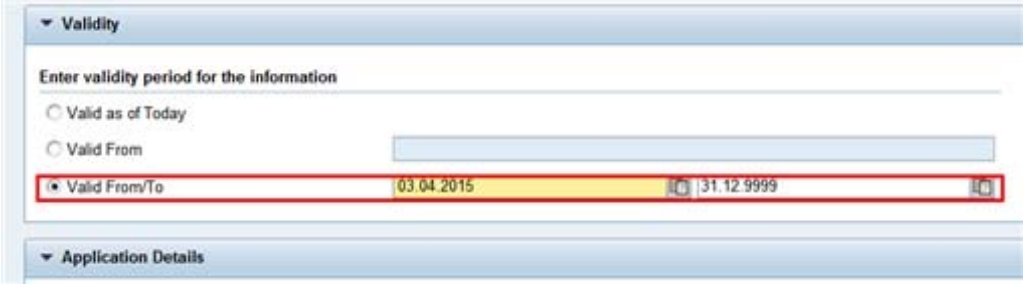
5. Click on the Duty Station button.

Address Data Application



6. Select the ○ Valid From/To button.

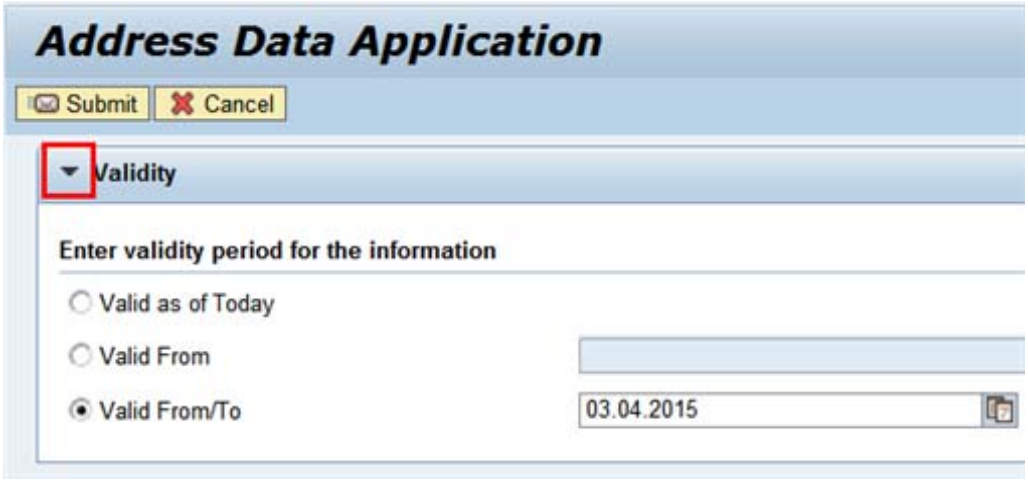
Address Data Application



7. Select or enter the start date of validity of the address, in this case, 03.04.2015

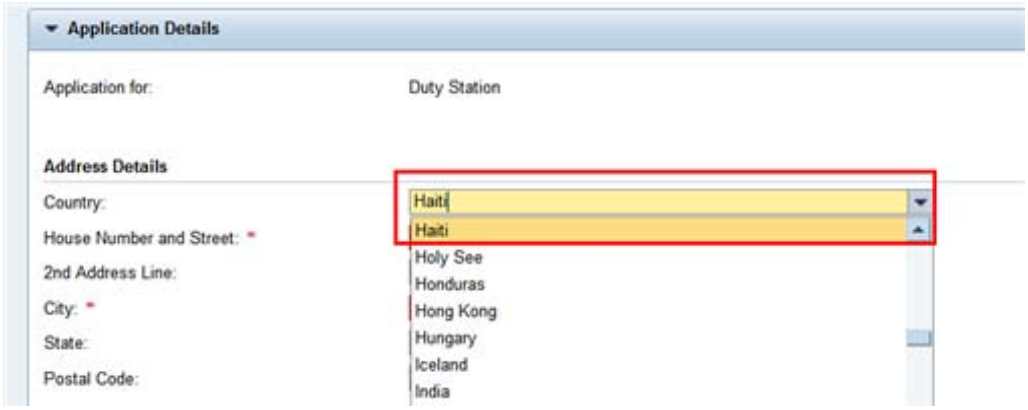
and leave the default date in the Valid To field. Unless you have a known expiration date of the validity of the address, in whcih case you could enter it following the DD.MM.YYYY format.

Address Data Application



8. Click on the collapse button to close this section.

Address Data Application



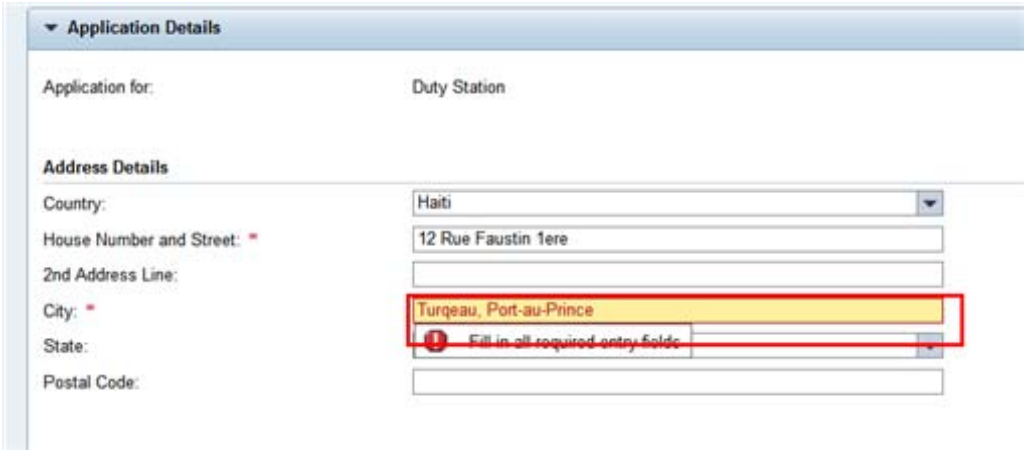
9. Select from the list of options the country where the duty station is located. In this demonstration, the duty station is in Haiti.

Address Data Application



10. Enter the address of the duty station. In this demonstration, enter "12 Rue Faustin 1ere" .

Address Data Application



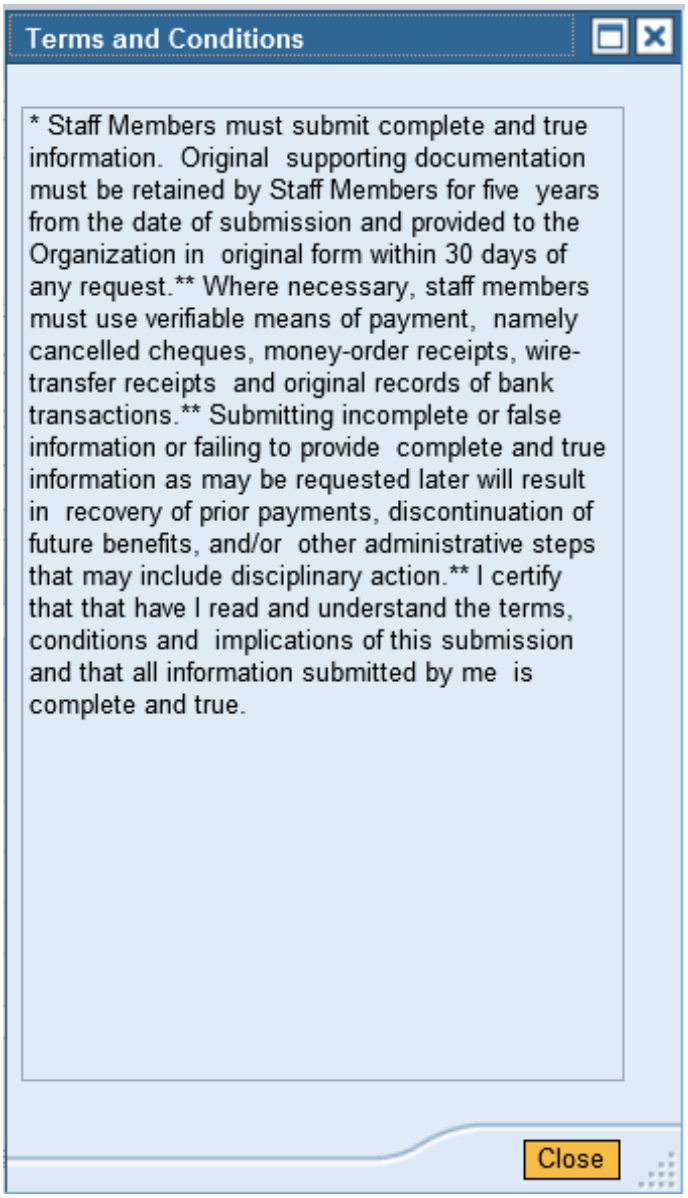
11. Enter the city where the duty station is located. In this demonstration, enter "Turqeau, Port-au-Prince". .

Address Data Application



12. Click on the Terms & Conditions link and review the information.

Terms and Conditions



13. Once you have read the Terms and Conditions, click on the Close button to return to the Address Data Application.

Address Data Application



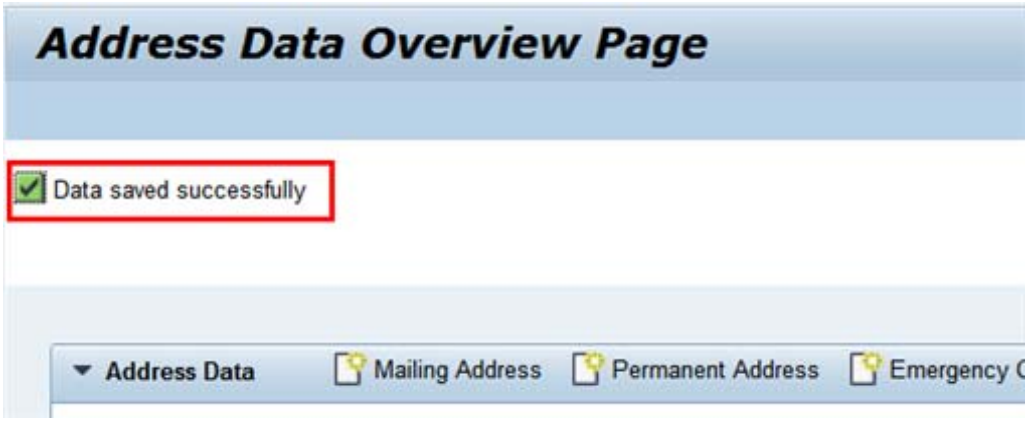
14. Click on the checkbox to acknowledge and accept the Terms & Conditions.

Address Data Application



15. Click on the Submit button.

Address Data Overview Page



16. Message appears that the data was saved successfully.

Address Data Overview Page



17. The Valid To date for the previous duty station has changed to one day before the Valid from date of the new duty station. Click on the Employee Self-Service SM tab to return to the main menu.

Purpose

This procedure is used by the ***Staff Member*** to change their marital status.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.

- ***Staff member*** changes their marital status through the Umoja Employee Self-Service portal.
- ***Staff member*** presents original documents offline to the ***HR Partner***.

Pre-requisites

If the ***staff member*** got married, divorced or they have been widowed, they must present one of the following original documents to the ***HR Partner***.

- **Marriage certificate, certification of partnership or other certificate** showing proof of marriage or union to the staff member; or
- **Death certificate;** or
- **Divorce decree**.

Objectives

As part of the demonstration, we will show you:

- How to change your marital status.

Scenario

A ***staff member*** gets married and changes their marital status from single to married and related.

Note: The change of marital status request will not be completed unless the ***HR Partner*** verifies the original documentation.

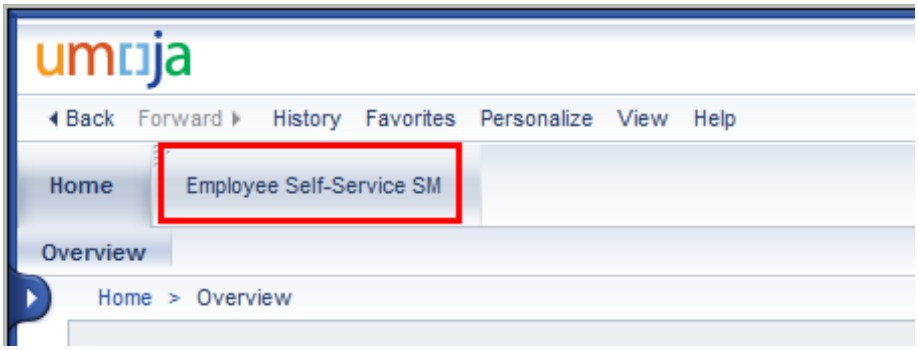
Menu Path

Employee Self Service SM > Personal Information> Personal Data

Procedure

1. Start the transaction logging in the Umoja Employee Self Service Portal.

Overview - Umoja qa portal - Q3J - Windows Internet Explorer



2. Click on the Employee Self-Service SM tab.

Employee Services



3. Click on the Personal Information link.

Personal Information



4. Click on the Personal Data link.

Fill Out Form Personal Data Details



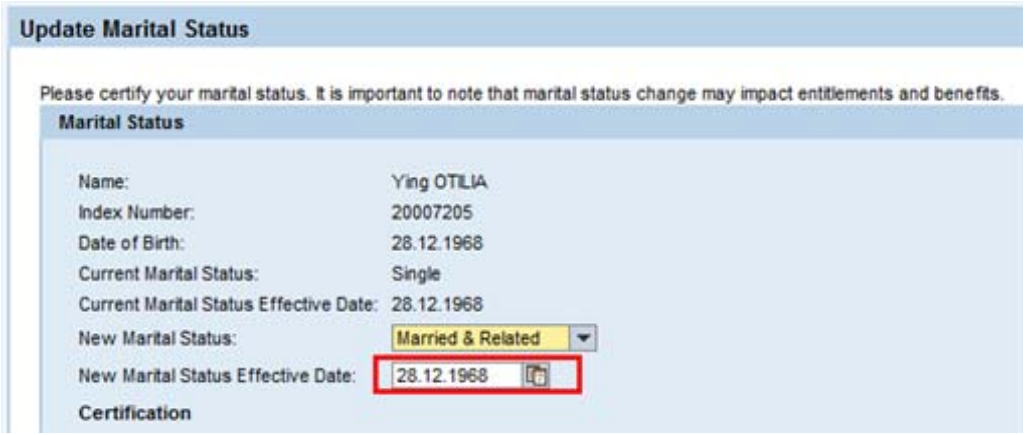
5. In the Marital Status field, click on the [Update] link.

Fill Out Form Personal Data Details



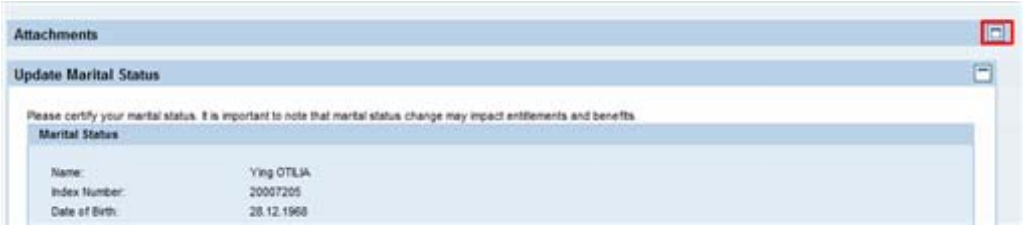
6. In the New Marital Status field, select your new marital status. In this demonstration, select Married & Related from the list.

Fill Out Form Personal Data Details



7. Select the date your new marital status took effect. Dates can be selected from the calendar by clicking on the Calendar icon or entered directly into the field using the DD.MM.YYYY format. The default date in this field is the year of the effective date of the current marital status and needs to be changed to the new effective date of the new marital status. In this case, enter 1 April 2015.

Fill Out Form Personal Data Details



8. Click on the Attachments expand button.

Fill Out Form Personal Data Details



9. Click on the Attachment expand button.

Fill Out Form Personal Data Details



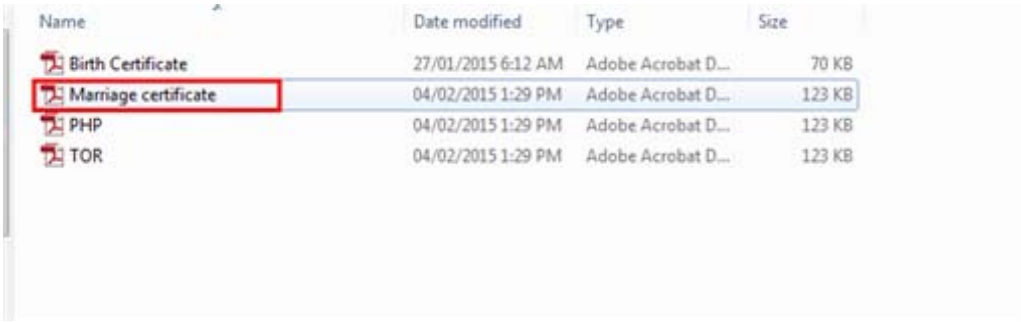
10. Click on the Add Attachment button.

Fill Out Form Personal Data Details



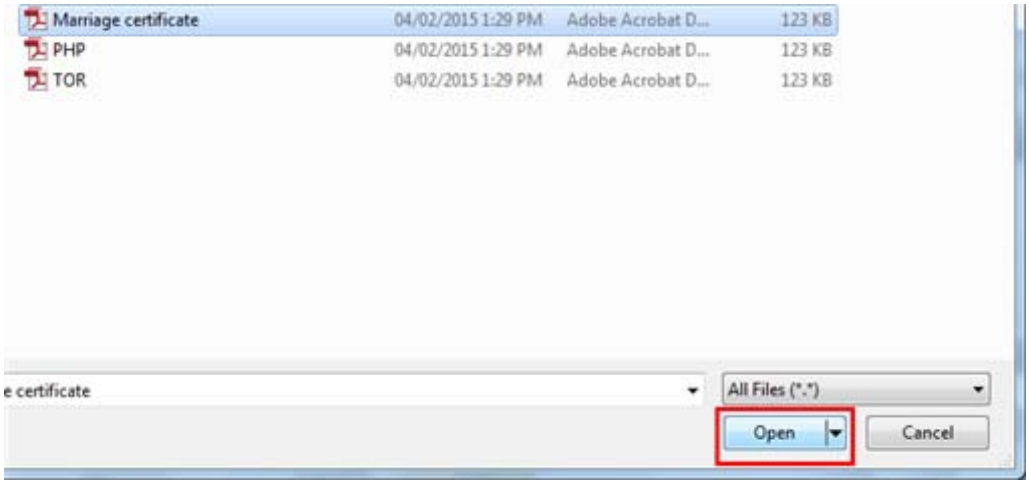
11. Click on the Browse... button.

Choose File to Upload



12. Select the document to attach. You should upload PDF documents only.

Choose File to Upload



13. Click on the Open button.

Fill Out Form Personal Data Details



14. Click on the Upload button.

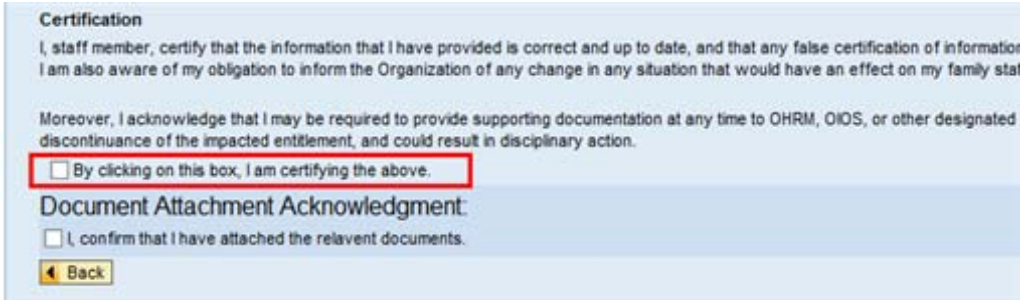
The system will not let you submit the form unless an attachment has been uploaded

Fill Out Form Personal Data Details



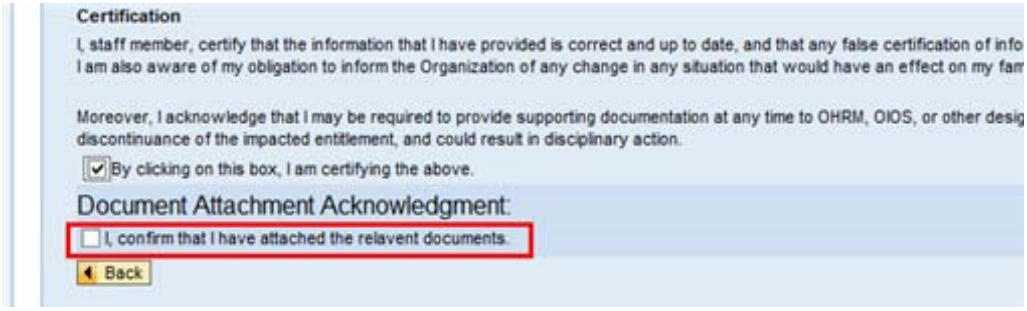
15. Select the document you just uploaded and then scroll to the bottom of the page.

Fill Out Form Personal Data Details



16. Read the certification and then click on the checkbox to acknowledge and accept the terms of certification.

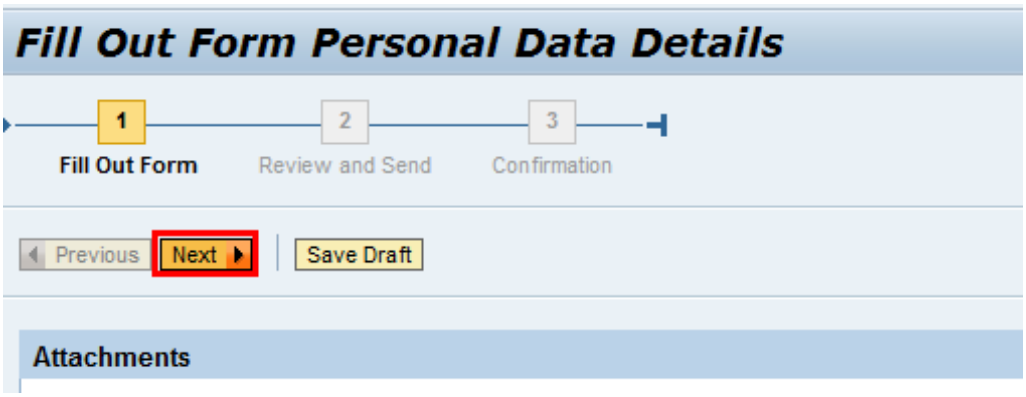
Fill Out Form Personal Data Details



17. Click on the checkbox to aknowledge that you have attached all relevant documents. Then scroll to the top of the page.

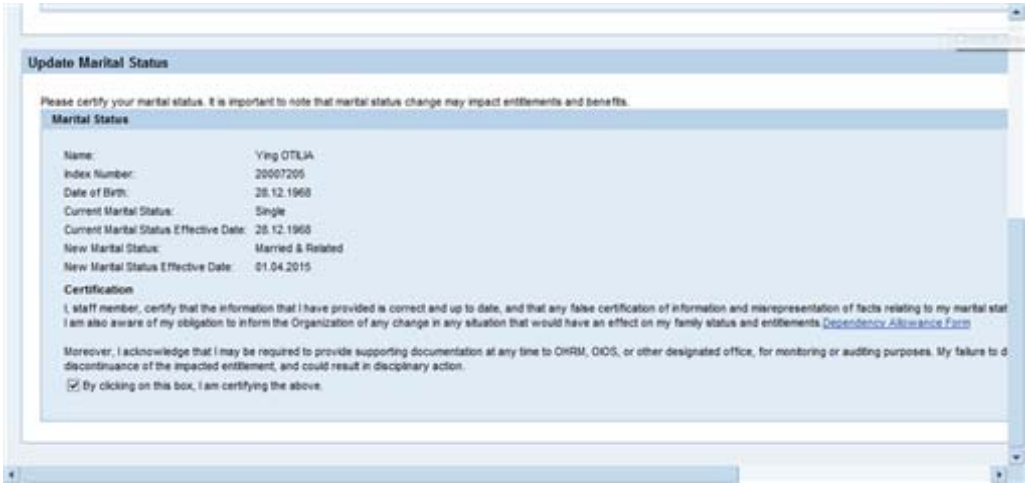
The system will not let you submit the form unless both undertakings have been acknowledged.

Fill Out Form Personal Data Details



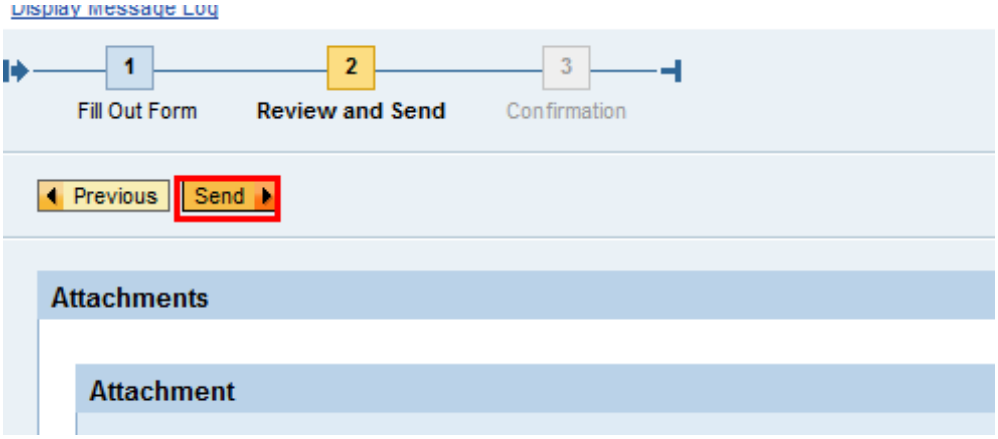
18. Click on the Next button to continue the transaction.

Review Form Personal Data Details



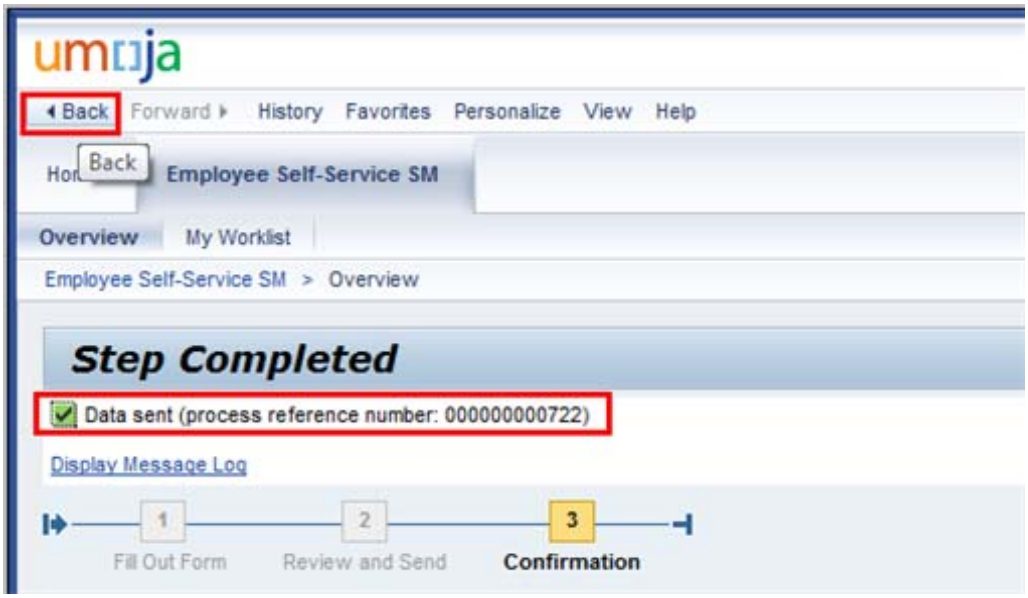
19. Review the information entered , if you need to make any corrections scroll to the top of the page and click on the Previous button.

Review Form Personal Data Details



20. Click on the Send button to sumit the form to the HR Partner.

Personal Data - Umoja qa portal - Q3J - Windows Internet Explorer



21. A message appears indicating whether the request was sent successfully. Click on the Back button to return to the Employee Self Service main menu.

Purpose

This procedure is used by the ***Staff Member*** to nominate beneficiaries and indicate the percentage of their entitlement.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

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Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.

- ***Staff member*** nominates one or more beneficiaries through the Umoja Employee Self-Service portal.
- The ***staff member*** prints the beneficiary (P2) form, and signs it in front of the ***HR Partner***.
- The ***HR Partner*** counter signs the form, places it in the ***staff member's*** file, and approves the beneficiaries in the Umoja Approver Work Centre.

Pre-requisites

None

Objectives

As part of the demonstration, we will show you:

- How to nominate beneficiaries
- Print the Beneficiary (P2) form

Scenario

A ***staff member*** designates three beneficiaries and indicates that they are entitled to 50%, 30% and 20%, respectively.

Menu Path

Employee Self Service SM > Personal Information> Beneficiary Details

Procedure

1. Start the transaction using the menu path:

   Employee Self-Service>Personal Information>Beneficiary Details

Overview - Umoja qa portal - Q3J - Internet Explorer



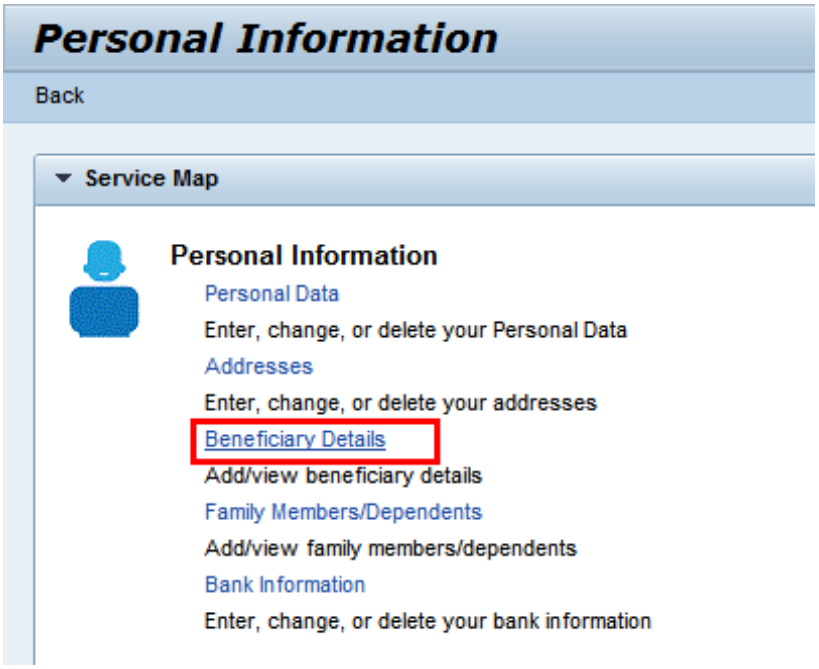
2. Click on the Employee Self-Service SM link.

Employee Services



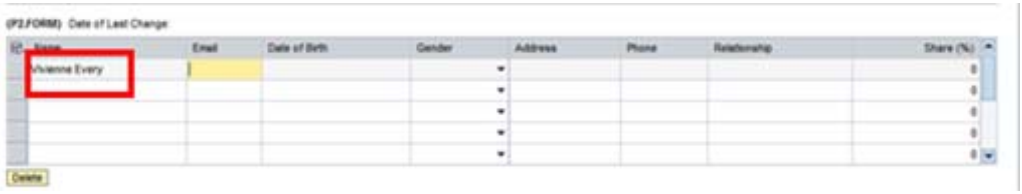
3. Click on the Personal Information link.

Personal Information



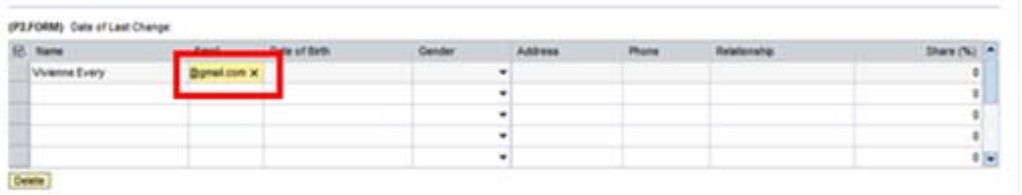
4. Click on the Beneficiary Details link.

Fill Out Form Update Beneficiary Details



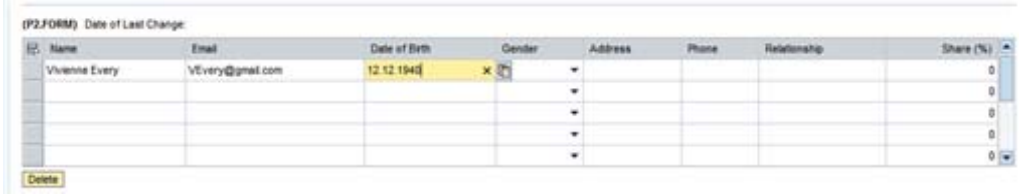
5. In the Name column, enter the first and last name of the beneficiary you want to nominate. In this demonstration, we entered "Vivienne Every".

Fill Out Form Update Beneficiary Details



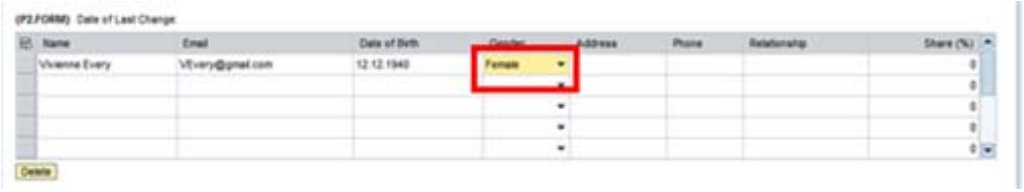
6. In the Email column, enter the email address of the beneficiary. If the beneficiary does not have an email address, leave the field blank. In this demonstration, we entered "VEvery@gmail.com".

Fill Out Form Update Beneficiary Details



7. In the Date of Birth column, select or enter the date of birth of the beneficiary as it appears on the birth certificate or passport, using the DD.MM.YYYY format. In this demonstration we entered "12.12.1940."

FIll Out Form Update Beneficiary Details



8. In the Gender column, select the gender of the beneficiary from the list. In this demonstration, we selected "Female".

Fill Out Form Update Beneficiary Details



9. In the Address column, enter the full mailing address, including zip code (if applicable) and country. In this demonstration we entered " Rue Liberte' Port-au-Prince Haiti".

Fill Out Form Update Beneficiary Details



10. In the Phone column, enter the phone number where the beneficiary can be reached, include the country code and area code (if applicable). In this demonstration, we entered "5095681265".

Fill Out Form Update Beneficiary Details



11. In the Relationship column, enter your relationship to the beneficiary. In this demonstration, we entered "Mother".

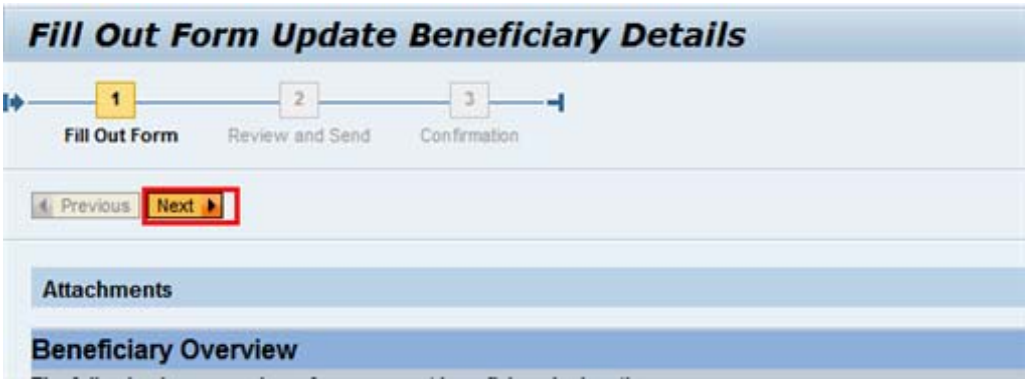
Repeat the above steps for each beneficiary you wish to nominate, In this demonstration, we added two additional beneficiaries.

Fill Out Form Update Beneficiary Details



12. Once you have listed all the beneficiaries and their contact information, proceed to the Share column and enter the percentage of benefits you wish each beneficiary to receive. The total percentage of all the beneficiaries must equal 100%. In this demonstration, we will assign the percentages of 50%, 30% and 20%, adding up to 100%.

Fill Out Form Update Beneficiary Details



13. Click on the Next button.

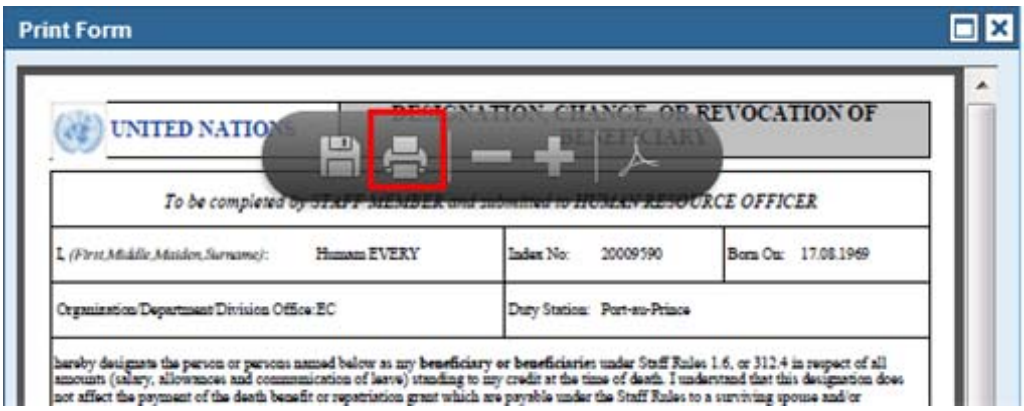
Review Form Update Beneficiary Details



14. Click on the Print button.

Accurately review the information and make all necessary corrections of any errors. You need to click on the PRINT button and print the form now as the system will not let you print the form once submitted.

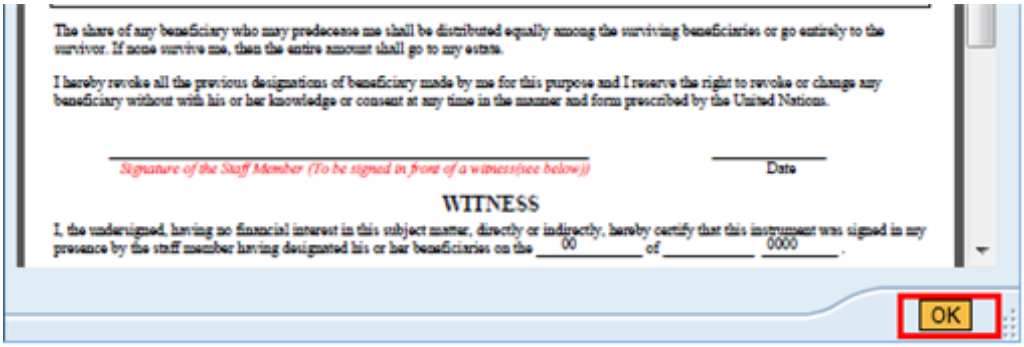
Print Form



15. Click on the Printer icon to print the form.

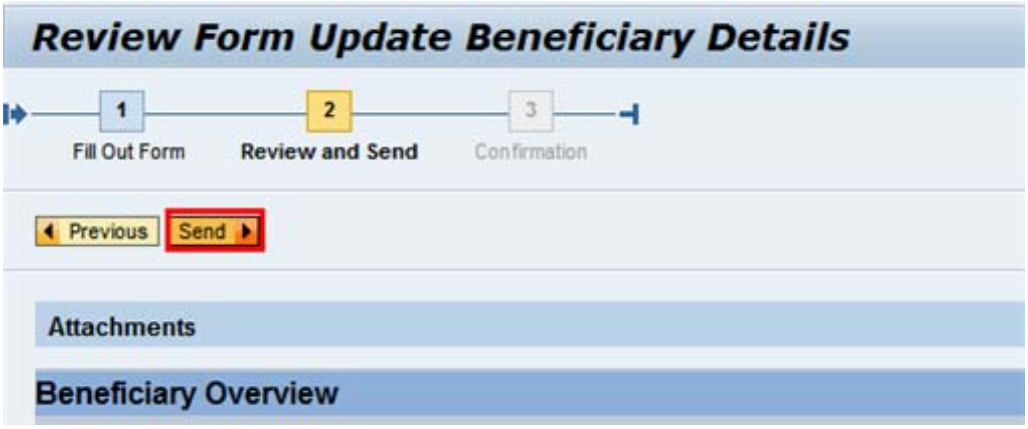
You may have to hover over the top of the Print Form to display the Printer icon. You can also save the form by clicking on the Save icon.

Print Form



16. Once the form has printed, click on the OK button to return to the designated of beneficiaries screen.

Review Form Update Beneficiary Details



17. Click on the Send button to submit to the HR Partner.

Beneficiary Details - Umoja qa portal - Q3J - Internet Explorer



18. Click on the Employee Self-Service SM tab to return to the main menu.

Remember, the beneficiary information entered in ESS will not be approved and legally valid unless the signed ESS copy or P2 form is submitted to the HR Partner for counter signature. If you fail to countersign in the presence of the HR Partner, the previous beneficiary information on file, if any, will be the only valid legal document for beneficiary purposes.

Purpose

This procedure is used by the ***Staff Member*** to submit a request for rental subsidy. The steps are the same for rental subsidy outside North America and Europe and rental subsidy in North America and Europe.

Reference

Factsheets are provided and contain additional information on the different eligibility and documentation requirements for this subject.

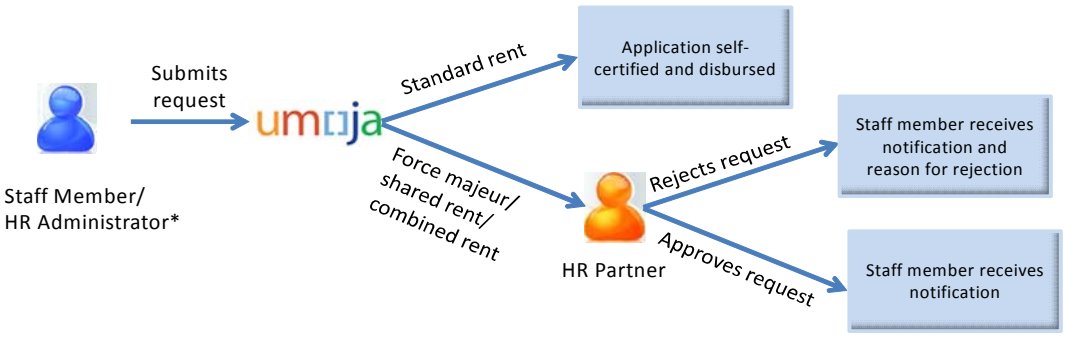
This quick reference, the training simulation and Factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.



*** HR Administrator can submit an application on behalf of the staff member when the staff member does not have access to ESS.**

**** Types of rent**

- **Standard rent:** When the rent claimed is for a single accommodation for the duration of the lease, with or without a broker's fee.
- **Shared rent:** When accommodation is shared with someone other than the spouse.
- **Combined rent:** When the rent claimed is combined for multiple accommodations.

If a rental subsidy is not automatically approved through ESS because the applicant has submitted an application for force majeure, sharing with someone other than spouse or combined rent, the HR Partner is responsible for the following actions:

1. The ***HR Partner*** reviews the policy and guidelines to verify ***staff member's*** eligibility to rental subsidy.
2. The ***HR Partner*** reviews the ***staff member's*** submitted application and documentation
3. The ***HR Partner*** approves or rejects the application. If approved, the disbursement will be made.

Pre-requisites

- Prior to submitting the rental subsidy application, you need to ensure your duty station address is updated with the details of the address on the lease. Please refer to the quick guide on how to add or update your addresses before you start the process of submitting a rental subsidy application.
- Original signed lease agreement and subsequent lease extensions;
- Copy of first month's rent receipt;
- Contract or agreement with the broker; including real estate broker's license number and fee, if applicable;
- Original receipt for payment of broker's fee, if applicable;
- Electric bill, if the electricity is not included in the rent.

Objectives

As part of the demonstration, we will show you:

- How to submit a new request for rental subsidy.

Scenario

A professional level ***staff member*** submits for the first time an application for rental subsidy, they pay a broker's fee and the rent does not include the cost of electricity.

Menu Path

Use the following menu path(s) to begin this process:

Employee Self-Service SM > Overview > Entitlements > Check Entitlement Eligibility > Apply On-line

Procedure

1. Start the transaction using the menu path

   Employee Self-Service SM > Overview > Entitlements > Check Entitlement Eligibility > Apply On-line

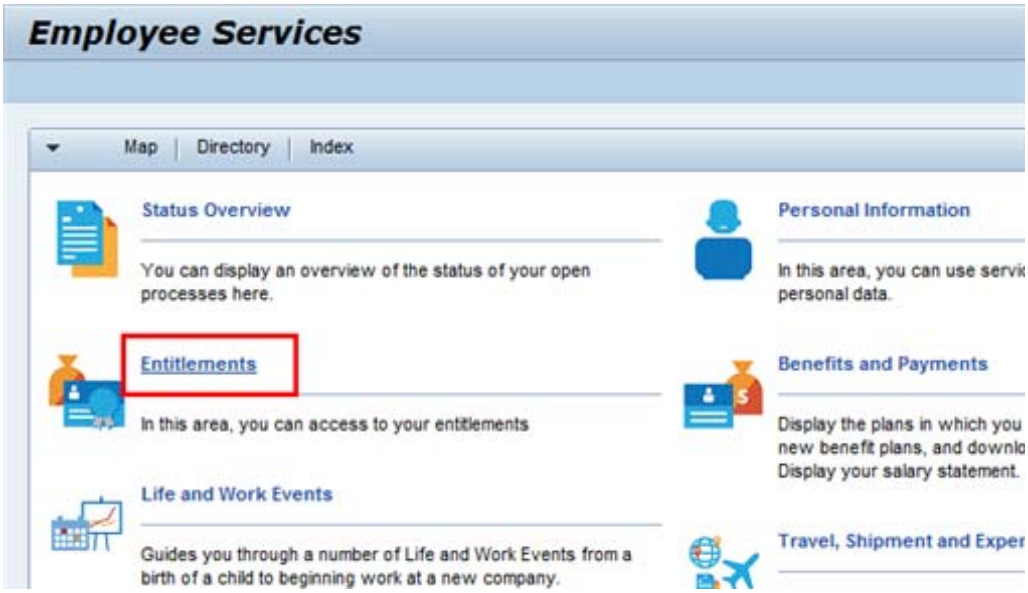
Overview - Umoja qa portal - Q3J - Windows Internet Explorer



2.

Click on the Employee Self-Service SM tab.

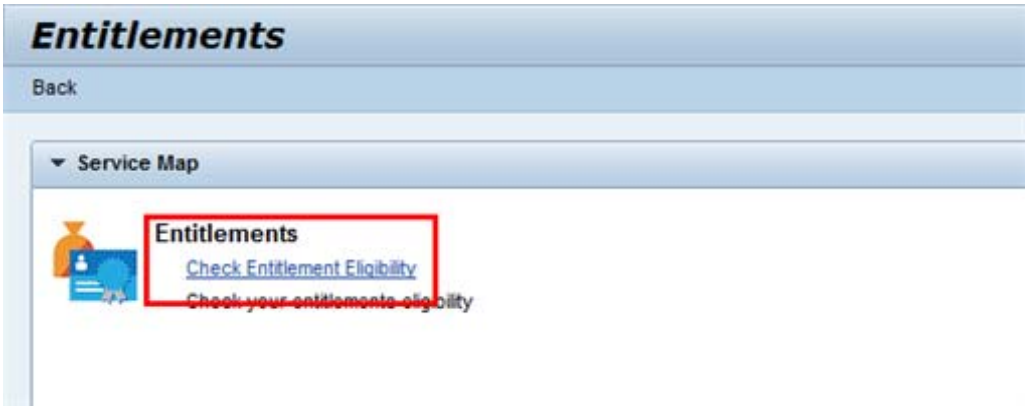
Employee Services



3.

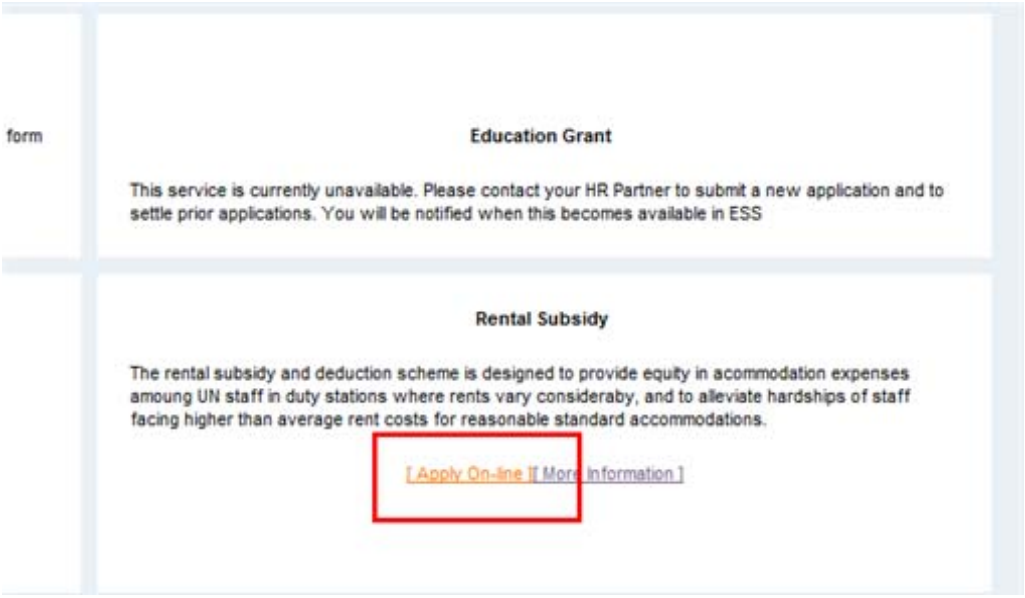
Click on the Entitlements link.

Entitlements



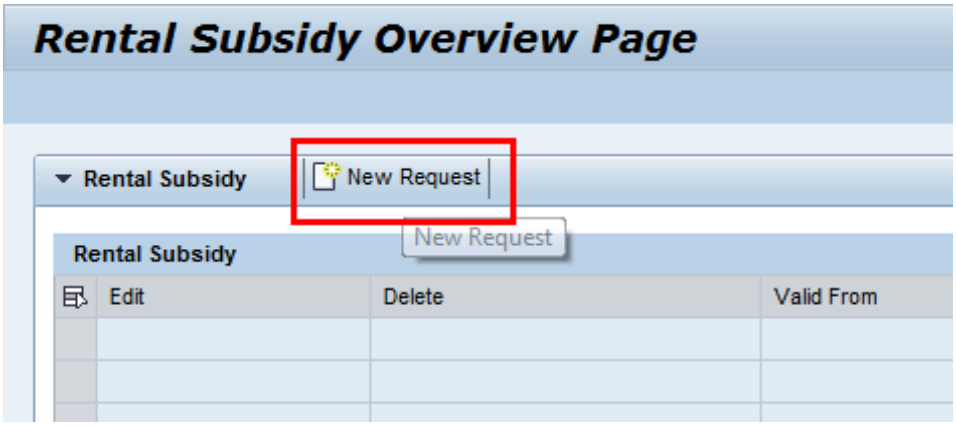
4. Click on the Check Entitlement Eligibility link.

Entitlement Summary Launch Page



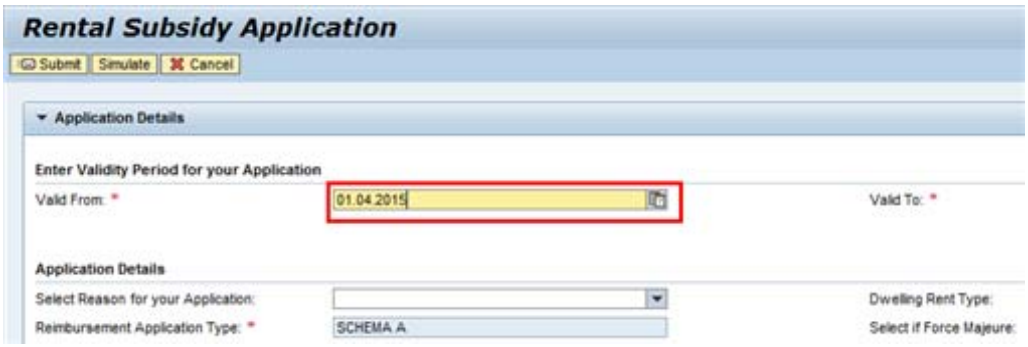
5. Click on the [Apply On-line] link.

Rental Subsidy Overview Page



6. Click on the New Request button.

Rental Subsidy Application



7. Select or enter the Valid From date, using the DD.MM.YYYY format.

The valid from date is the first day of the lease agreement or the first day following the end of the period of payment of the daily subsistence allowance element of the assignment grant, whichever is later.

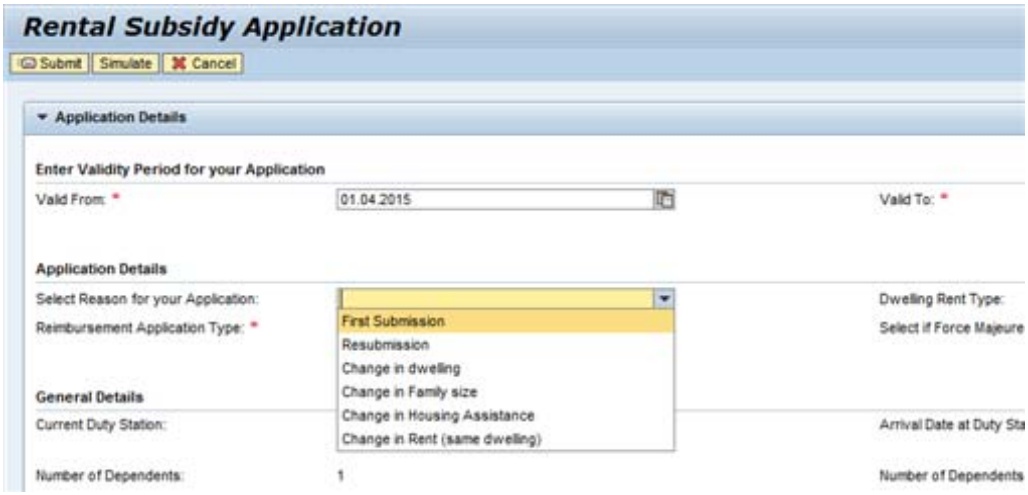
Rental Subsidy Application



8. Select or enter the Valid To date using the DD.MM.YYYY format.

The Valid To date is the date the lease expires.

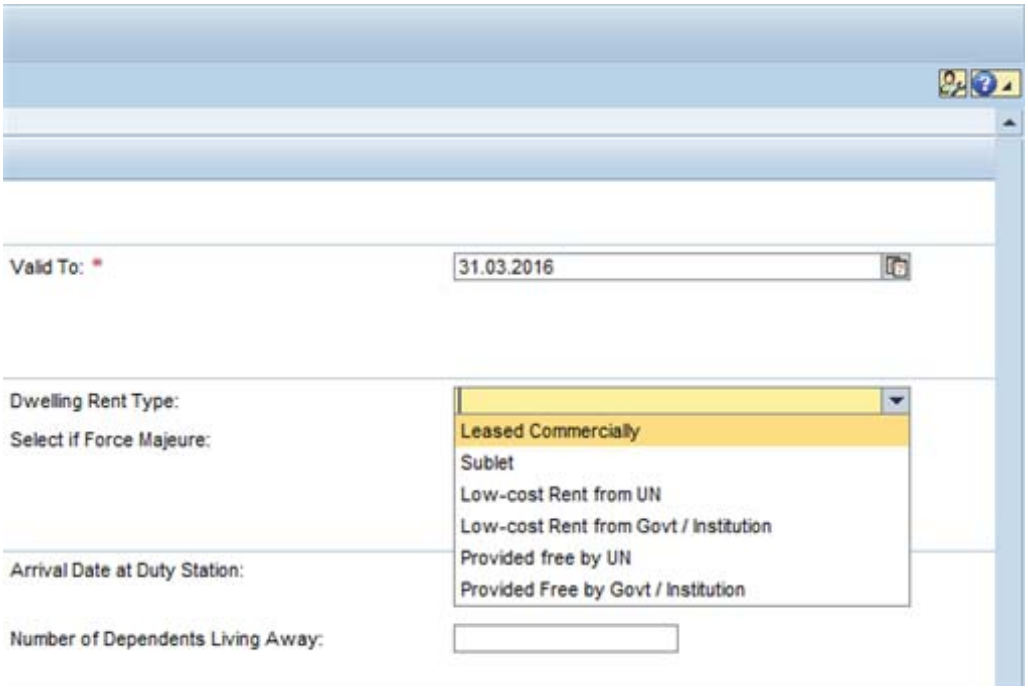
Rental Subsidy Application



9. Select the reason for your application from the list of options. In this case, select First Submission

- *First Submission*- select when this is the first time an application is being submitted. ***This option is selected in this scenario.***
- Resubmission- select if the application is resubmitted because additional information or attachments have been added to the application.
- *Change in dwelling*- select if your residence address has changed.
- *Change in Family Size*- select if the size of your family has changed.
- *Change in Housing Assistance*- select if you have started to receive housing assistance.
- *Change in Rent (same dwelling)* -select if there is any change (increase or decrease) in the amount of rent you are paying. This option may be used when you are given a rebate in rent or the regular rent you pay changes for any reason.

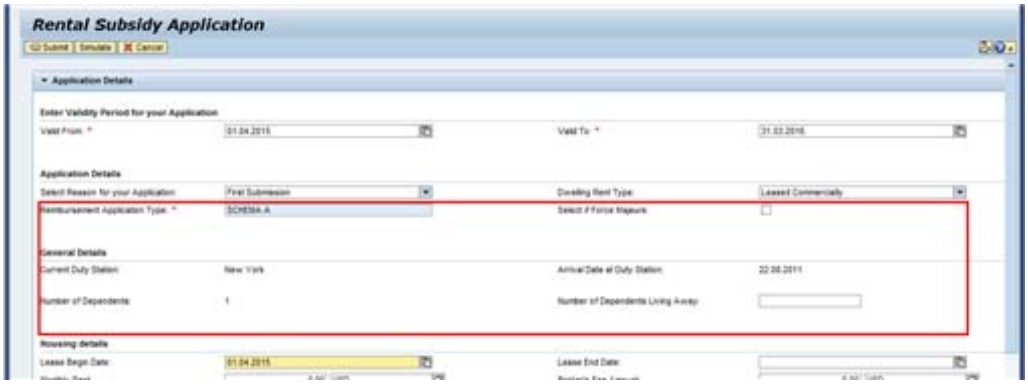
Rental Subsidy Application



10. Select the dwelling type from the list of options as follows:

- *Lease Commercially*- select when you are renting from a commercially owned building. ***This option is selected in this scenario.***
- Sublet- select if you are renting from the tenant and not the building owner.
- *Low-cost Rent from UN*- select if you pay rent to the UN at a substantially lower rate than the average rent for the duty station.
- *Low-cost Rent from Govt/Institution*- select if you pay rent to a Government or a related institution at substantially lower than the average rent for the duty station.)
- *Provided Free by UN*- select if you receive free residence from the UN.
- *Provided Free by Govt/Institution*- select if you receive free residence from a Government or a related institution.

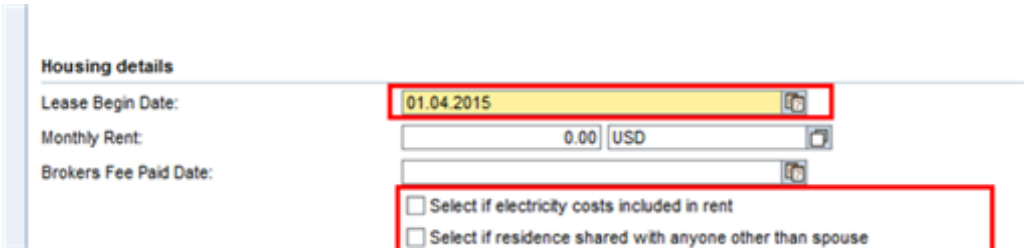
Rental Subsidy Application



11. The schema displayed in the Reimbursement Application Type field is pre-selected and based on your duty station. This will be used to calculate the conditions of the staff member's rental subsidy.

- Select Force Majeure - if there is a change in dwelling.
- Current Duty Station - this is pre-populated with the location of the duty station.
- Arrival Date at Duty Station - this is pre-populated with the date you arrived at the duty station.
- Number of Dependents - this is pre-populated with the number of dependents you had as of the time of the application.
- Number of Dependents Living Away - if any dependants are not living with you at the duty station (including if they are studying away from the duty station) enter the number of dependants who are living away in this field.

Rental Subsidy Application



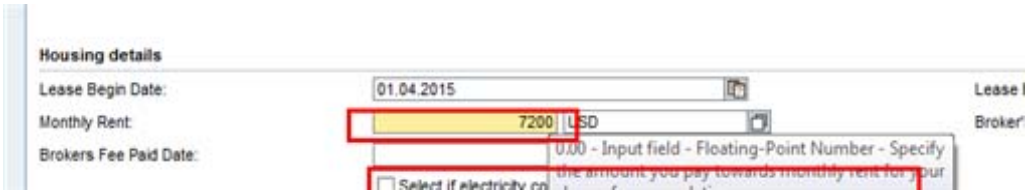
12. Select or enter the date the lease starts.

Rental Subsidy Application



13. Select or enter the expiration date of the lease.

Rental Subsidy Application



14. Enter the amount of rent you are paying and in the type of currency. In this scenario, the staff member and the spouse are living together, so the total amount of rent is entered.

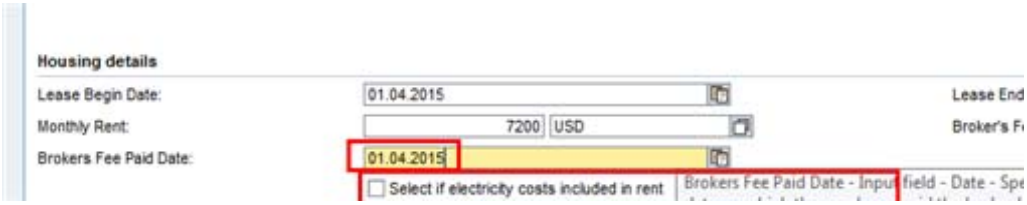
- If the residence is shared with anyone other than the staff member's spouse, you must enter only your share of the rent and the total rent.
- If you are eligible for rental subsidy for multiple accommodations, you must enter the combined rent of both locations.

Rental Subsidy Application



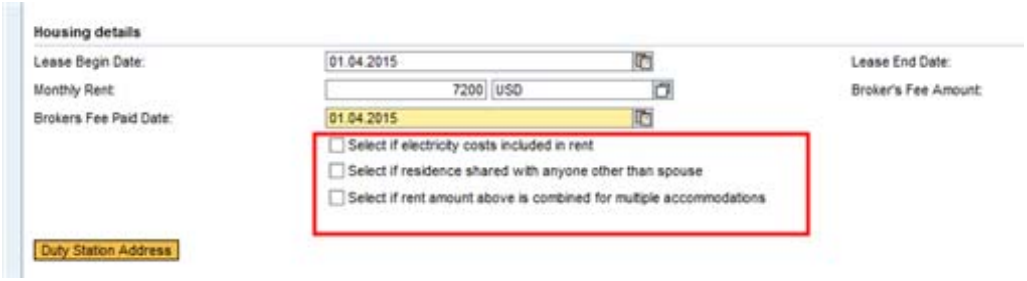
15. Enter the amount paid to the broker and in the type of currency.

Rental Subsidy Application



16. Select or enter the date you paid the broker's fee.

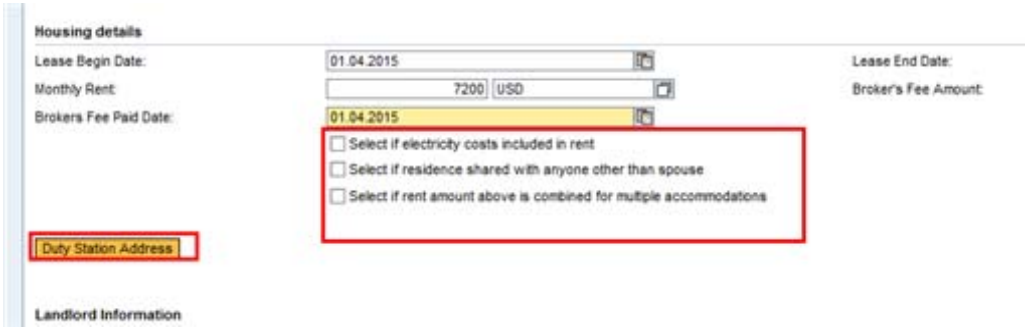
Rental Subsidy Application



17. If applicable, select any of the following options:

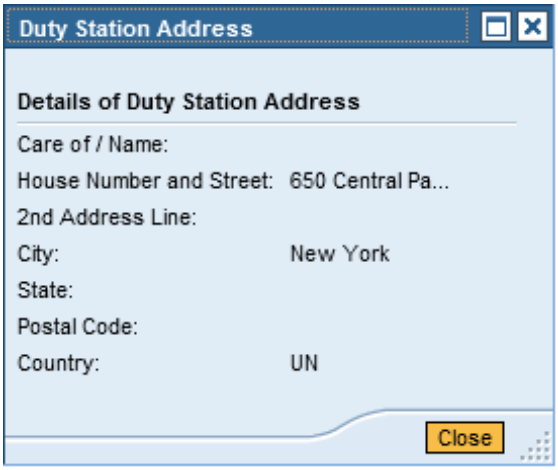
- *Select if electricity costs included in rent*- choose if the rent amount includes the electrical cost. If chosen, you will be asked to enter the number of bedrooms in the residence.
- *Select if residence shared with anyone other than spouse*- choose if you share the residence with anyone other than your spouse and the lease is in your name.
- *Select if rent amount above is combined for multiple accommodations*- choose if you maintain two residences and are claiming rental subsidy for both.

Rental Subsidy Application



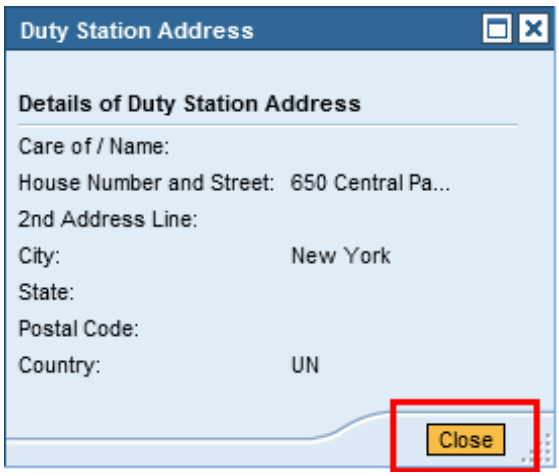
18. Click on the Duty Station Address button to view the address.

Duty Station Address



19. Verify that the Duty Station Address corresponds to the Lease. If not, then you will need to update the Duty Station Address before submitting your request for Rental Subsidy. Refer to the quick guide on how to update Addresses.

Duty Station Address



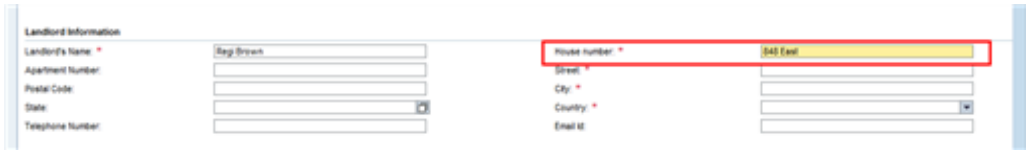
20. Click on the Close button to return to the Rental Subsidy Application.

Rental Subsidy Application



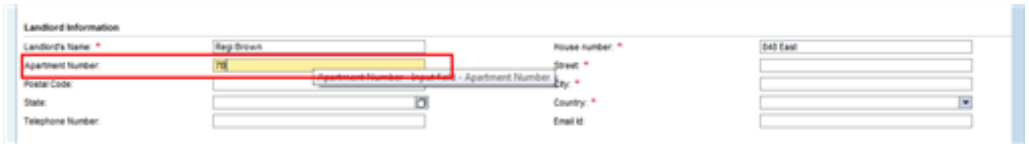
21. Enterenter the first (given) and last (family) name of the landlord.

Rental Subsidy Application



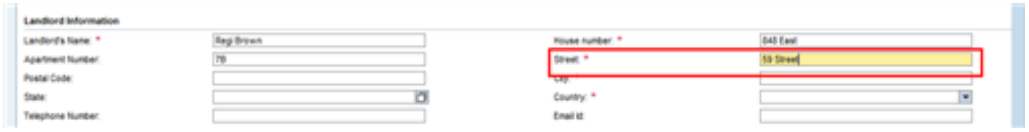
22. Enter the House number only where the landlord resides as it appears on the Lease.

Rental Subsidy Application



23. If applicable, enter the landlord's apartment number.

Rental Subsidy Application



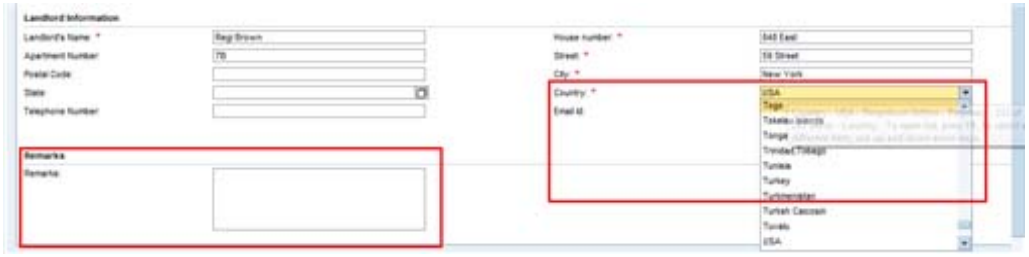
24. Enterenter the name or number of the street where the landlord resides

Rental Subsidy Application



25. Enterthe name of the city, provinces, parishes, etc. where the landlord resides.

Rental Subsidy Application

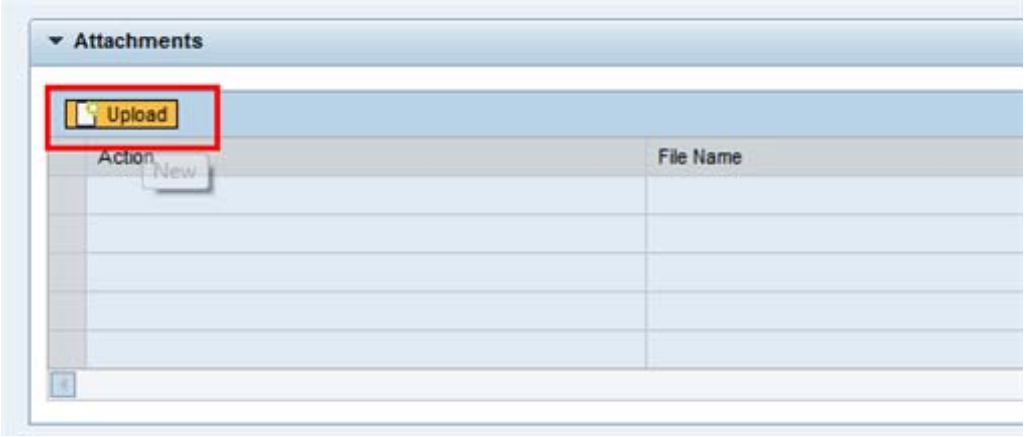


26. Select orenter the name of the country where the landlord resides.

If applicable, enter the email address of the landlord.

Additional information can be entered in the *Remarks* field, such as, in the event you are receiving some type of housing assistance other then through the UN, you must indicate the amount of money received and the source. You may also use this field to add any remarks you may want to have on record on this application.

Rental Subsidy Application

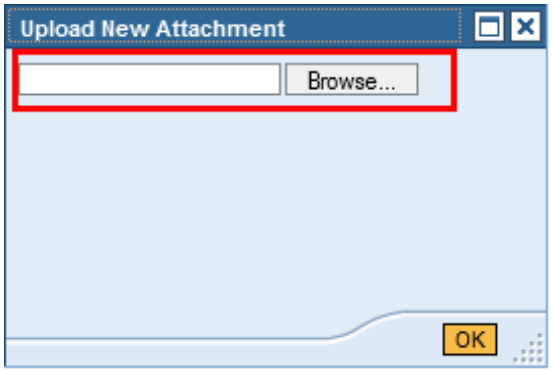


27. Click on the Upload button if you want to attach any of the following documents:

- Original signed lease agreement and subsequent lease extensions;
- Copy of first month's rent receipt;
- Contract or agreement with the broker; including real estate broker's license number and fee;
- Original receipt for payment of broker's fee;
- Electric bill

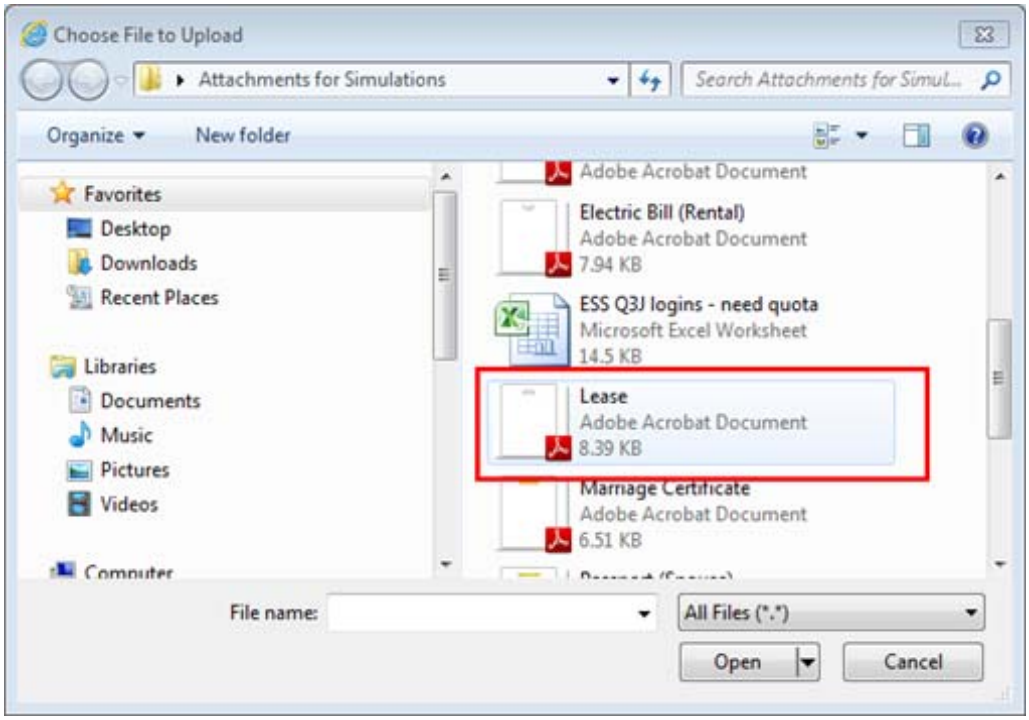
Remember that even if you attach the documentation, the original documentation must be kept for 5 years and you will be required to present it to the HR partner upon request. Failure to submit this documentation when required may result in recoveries and possibly disciplinary actions.

Upload New Attachment



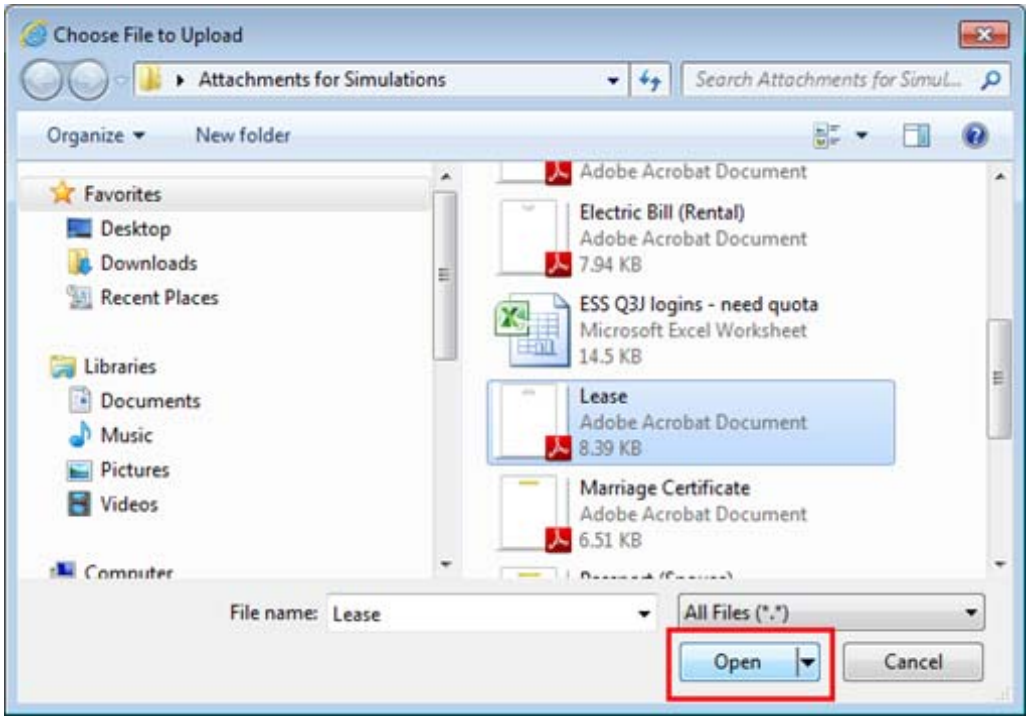
28. Click on the Browse... button. The Choose File to Upload window will open.

Choose File to Upload



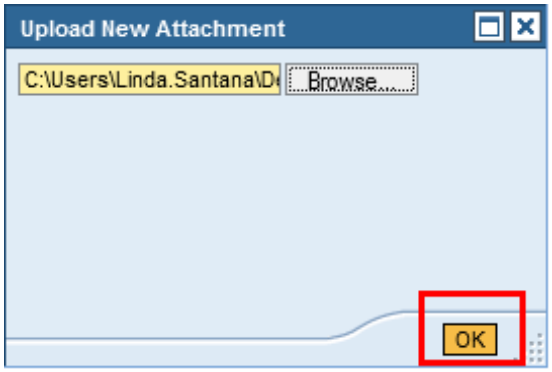
29. Select the document. You should only upload PDF files.

Choose File to Upload



30. Click on the Open button.

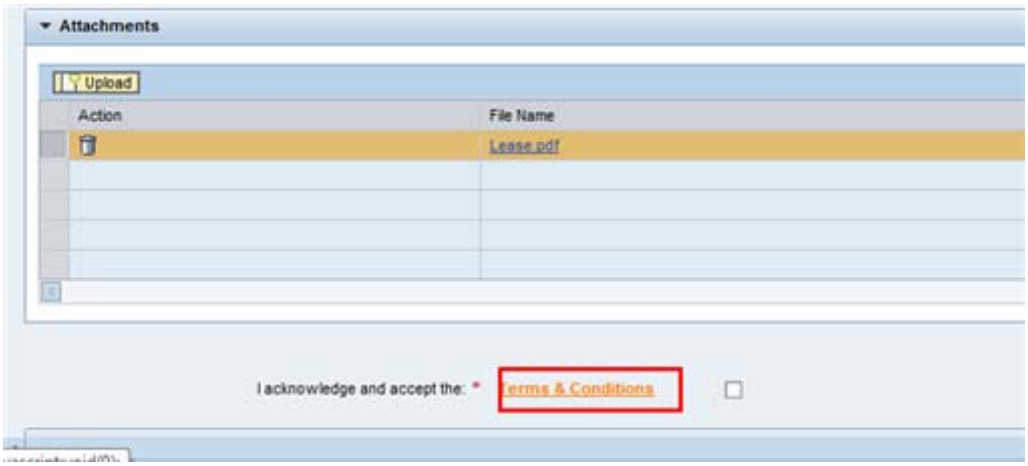
Upload New Attachment



31. Click on the OK button to upload the document.

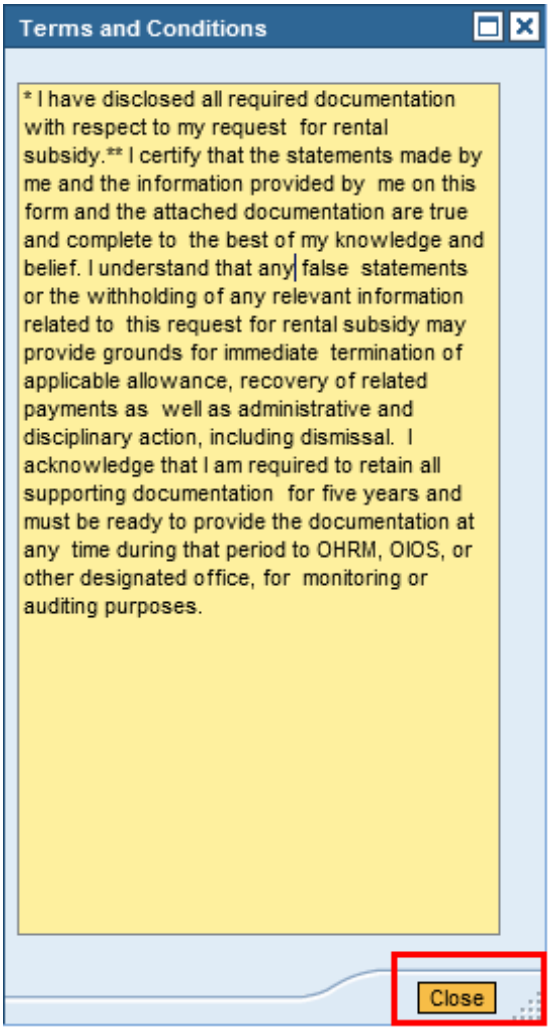
The document has been attached. Repeat the steps for each required document.

Rental Subsidy Application



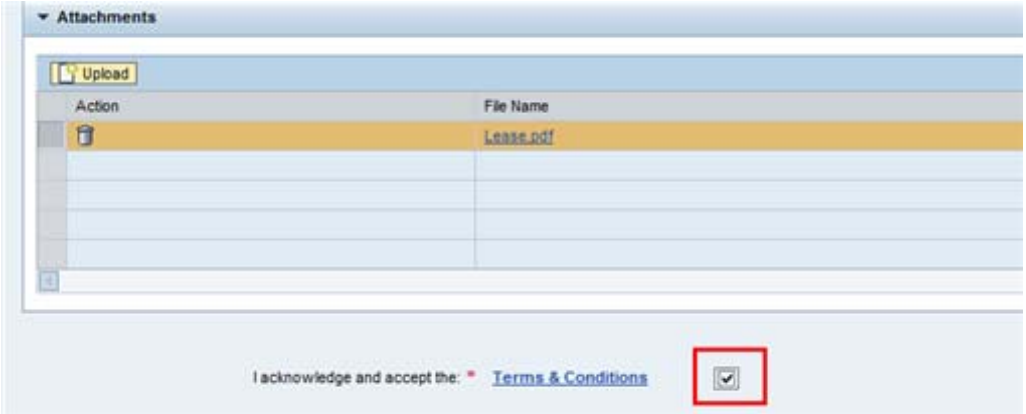
32. Click on erms & Conditions link.

Terms and Conditions



33. Once you have read the Terms and Conditions, click on the Close button to return to the Rental Subsidy Application.

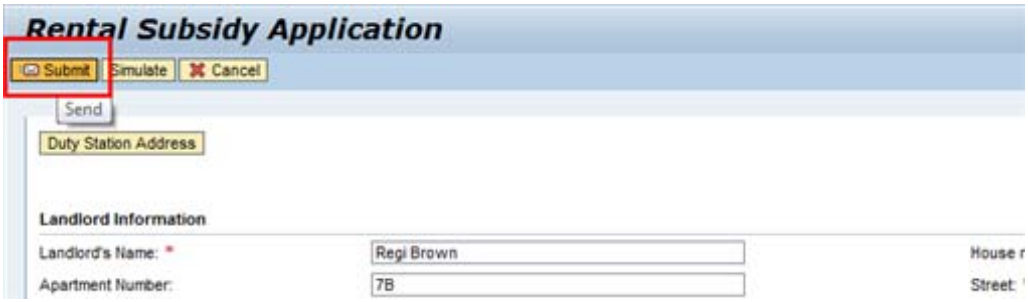
Rental Subsidy Application



34. Click on the checkbox to acknowledge and accept the Terms & Conditions.

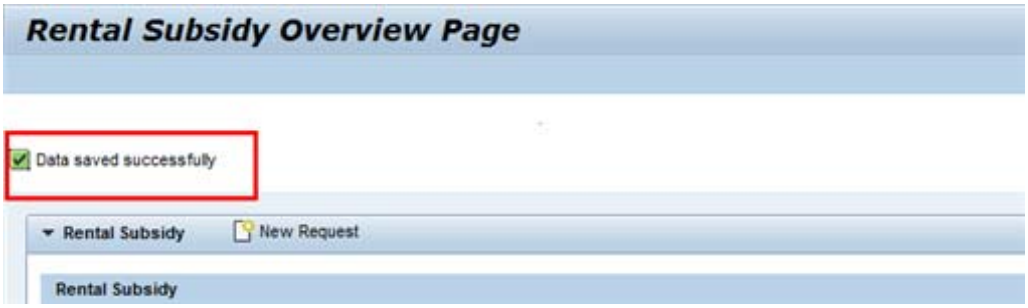
By clicking here you are acknowledging your responsibility to retain and produce all documentation within 5 years of the date of the application.

Rental Subsidy Application



35. Click on the Submit button.

Rental Subsidy Overview Page



36. A message will appear indicating the submission was successful.

In cases of force majeure, shared rent or combined rent, the request is routed to the HR Partner for approval. These types of requests will appear on the "Request in Process" until they have been approved by the HR Partner.

All other cases will be self-certified and approved automatically, so they will not be appear on the "Request in Process".

Check Entitlement Eligibility - Umoja qa portal - Q3J - Windows Internet Explorer



37. Click on the Employee Self-Service SM tab to return to the Employee Services menu.

Purpose

This procedure is used by the ***Staff Member*** to add their spouse as a household member or dependant. The UN only recognizes one spouse, but you may use these procedures to add additional spouses. In this case, the additional spouses will have the status of household members and will be non-recognized spouses for UN purposes. Only the recognized spouse can be a dependant, provided all requirements for dependency are met.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

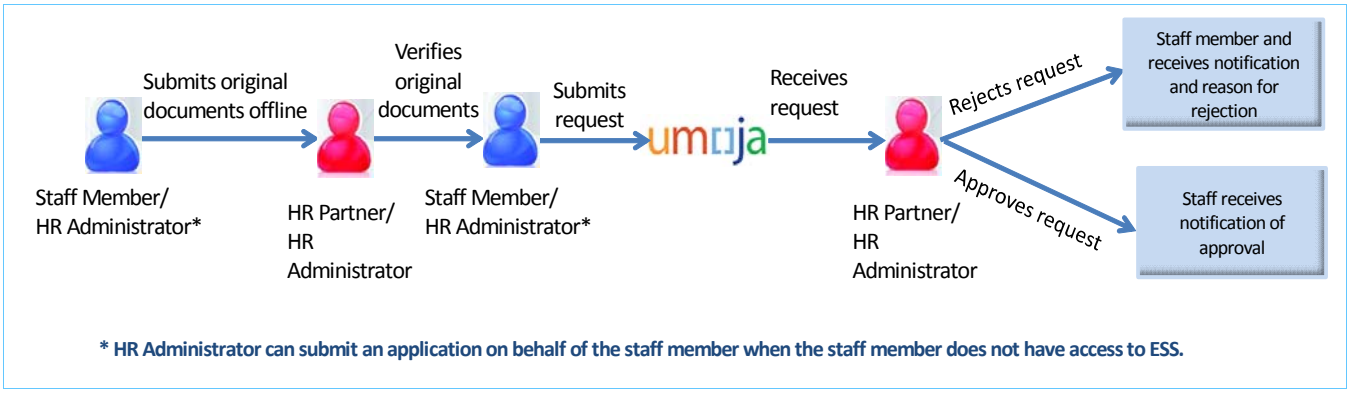
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.



1. ***Staff member*** presents offline all original documentation to the ***HR Partner or HR Administrator***.

2. ***HR Partner*** or ***HR Administrator*** verifies original documentation.
3. ***Staff member*** submits a request to add a household member and dependant through the Umoja Employee Self-Service portal. All required documents that have been verified by the ***HR Partner*** are attached to the submission
4. ***HR partner*** reviews request.
   a. If the ***HR partner*** approves the submission. The spouse appears in the ***staff members'*** *Family Members/Dependents* list.
   b. If the ***HR partner*** rejects the submission. The ***staff member*** is notified and the request is removed from the **Request in Process** section. The ***staff member*** must create a new request with the correct information and submit it for approval.

Pre-requisites

1. Present required documents to ***HR Partner*** prior to submitting request for verification of originals.
2. For establishing your spouse as Household member"
   - **Passport for the spouse** showing date of birth and nationality; and
   - **Marriage certificate, certification of partnership or other certificate** showing proof of marriage or union to the staff member;
3. For establishing your spouse as a Dependant, the following document and verifications are also required:
   - **Spouse's annual wage statement** demonstrating that the spouse is financially dependent (i.e. tax returns or pay stubs showing annual income below the established threshold to consider the spouse financially dependent, etc.). Refer to the Factsheets for the maximum earning thresholds.
   - **Verify** that your marital status has been updated in Personal Information, refer to the applicable Quick Reference for instructions.
   - **Verify** that you are not in receipt of secondary dependency allowance for a parent or sibling. Remember that if you have a secondary dependant, you will need to request to discontinue their dependency before you can apply for the dependency for your spouse.

Objectives

As part of the demonstration, we will show you:

- How to record your spouse as a household member.
- How to declare your spouse as a dependant.

Scenario

A staff member was married on 4 March 2015 and submits a request to add a spouse as a dependant along with the required documents. The staff member has not claimed their parents or sibling as a dependant and the spouse's income does not exceed the maximum earning requirements to be considered a dependant. Refer to Factsheets for the maximum earning thresholds.

Menu Path

Requests to add a spouse as a household member and dependant can be submitted using any one of the following menu paths:

- **Employee Self-Service>Personal Information**
- **Employee Self-Service>Entitlements**
- **Employee Self-Service>Life and Work Events**

You may use any of the three routes to access the dependency page, but for this demonstration, the request will be entered using the **Employee Self-Service>Entitlements** menu path.

Procedure

1. Start the transaction using the menu path:
   Employee Self-Service>Entitlements

Overview - Umoja qa portal - Q3J - Windows Internet Explorer



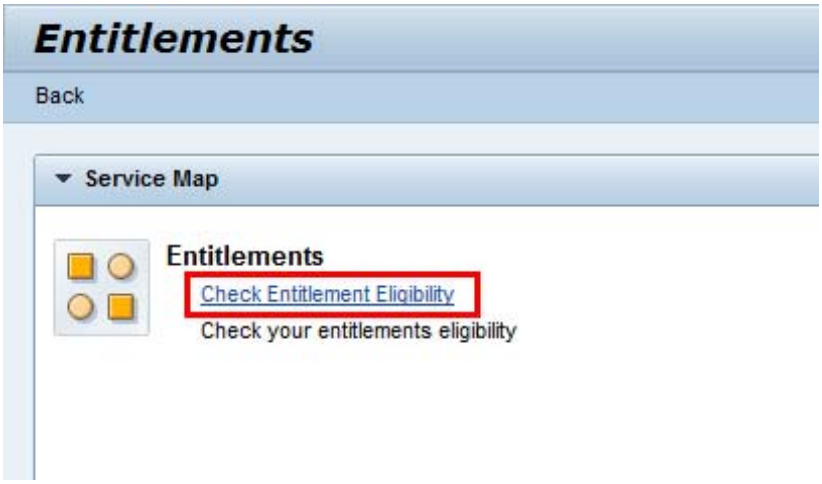
2. Click on the Employee Self-Service SM tab.

Employee Services



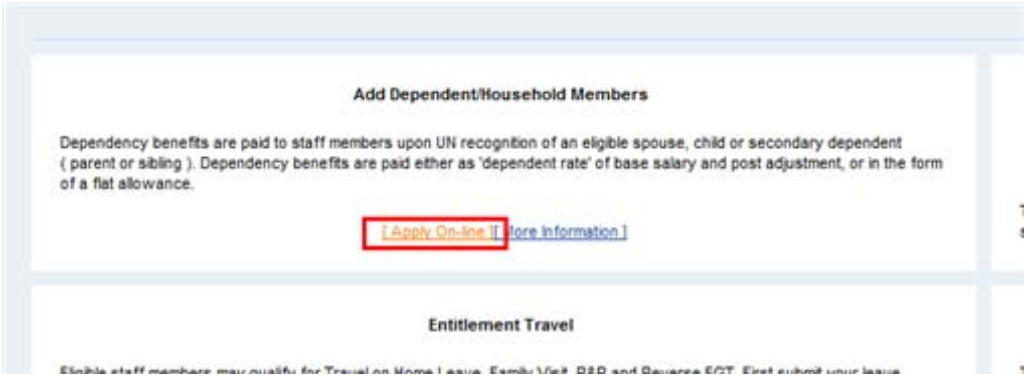
3. Click on the Entitlements link.

Entitlements



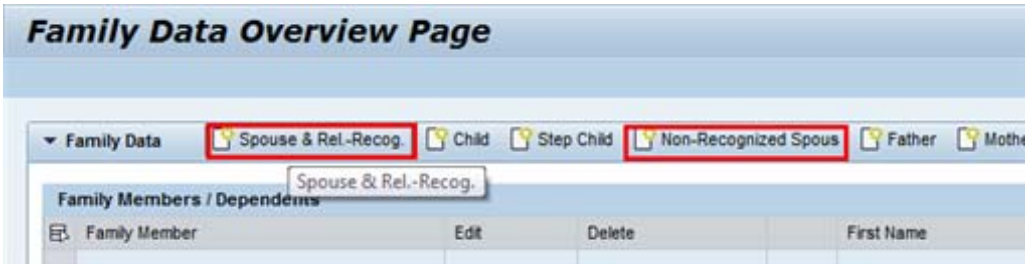
4. Click on the Check Entitlement Eligibility link

Entitlement Summary Launch Page



5. Click on the Apply On-line link.

Family Data Overview Page



6. Click on the Spouse & Rel.-Recog. button to add your spouse.

The United Nations recognizes only one spouse, additional spouses can be added as household members by clicking the Non-Recognized Spouse tab and following the same procedures.

Family Data Application



7. Select or enter the Valid From date, using the DD.MM.YYYY format.

Valid From date in most cases is either:

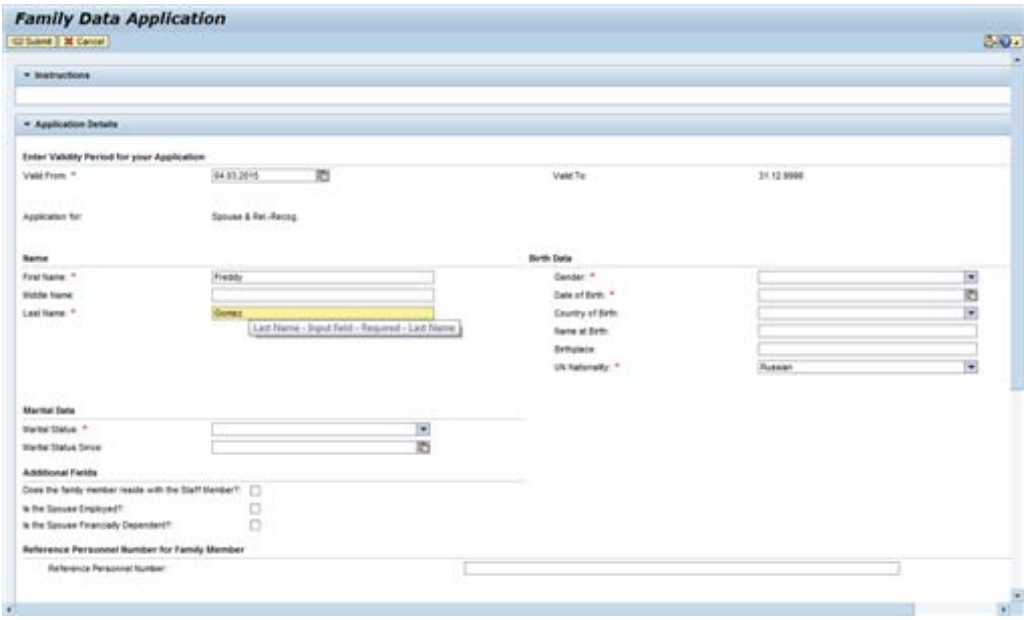
- Date of marriage as it appears on your marriage certificate; or
- Your Entry on Duty date, if you are submitting the request after you were appointed or reappointed (otherwise, your HR Partner would have added them as dependants at that time).

Family Data Application



8. Enter the First Name of the spouse exactly as it appears on the official birth certificate or passport. Do not abbreviate or omit names.

Family Data Application



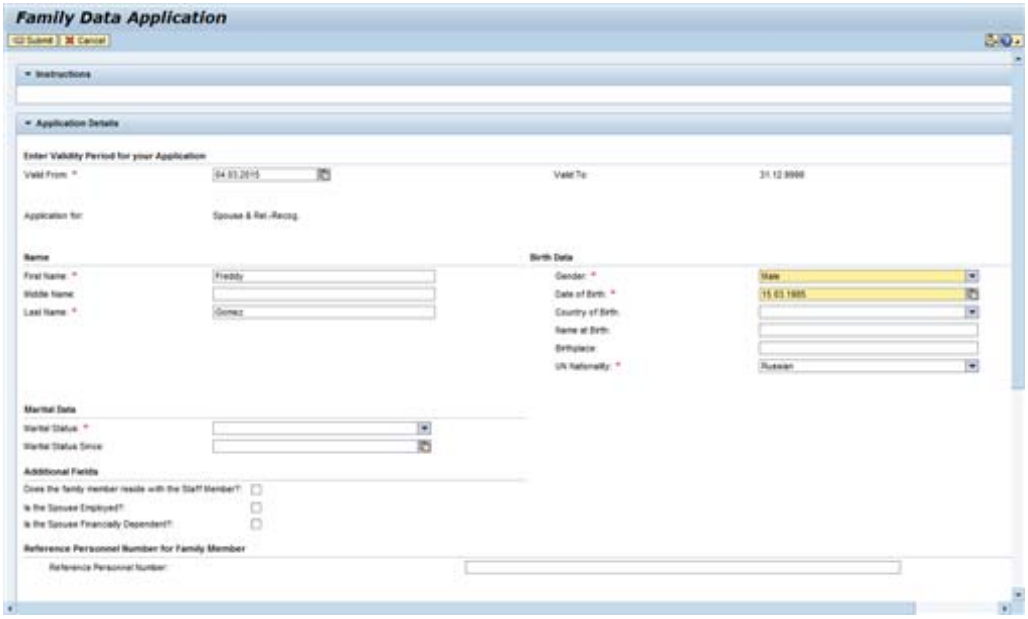
9. Type the Last Name of the spouse, if different than the staff member's family name. Last name must be typed exactly as it appears on the official birth certificate or official passport. Do not abbreviate or omit names.

Family Data Application



10. Click on the drop down menu and select the spouse's gender. In this demonstration our spouse is "Male"

Family Data Application



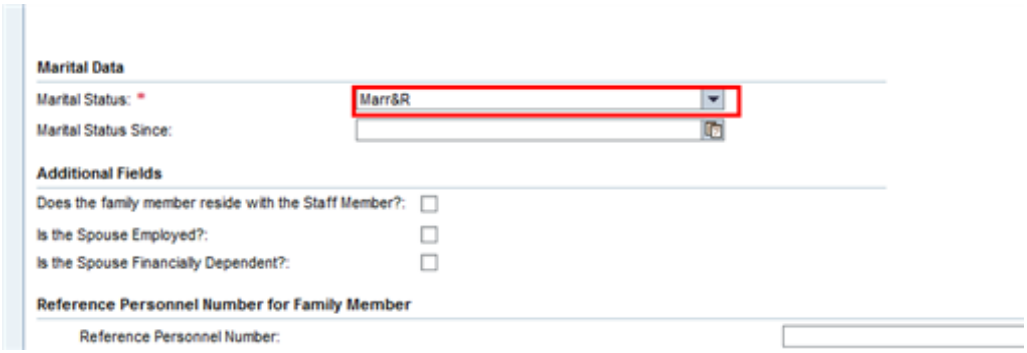
11. Select or enter your spouse's Date of birth, using the DD.MM.YYYY format, as it appears on the official birth certificate or passport.

Family Data Application



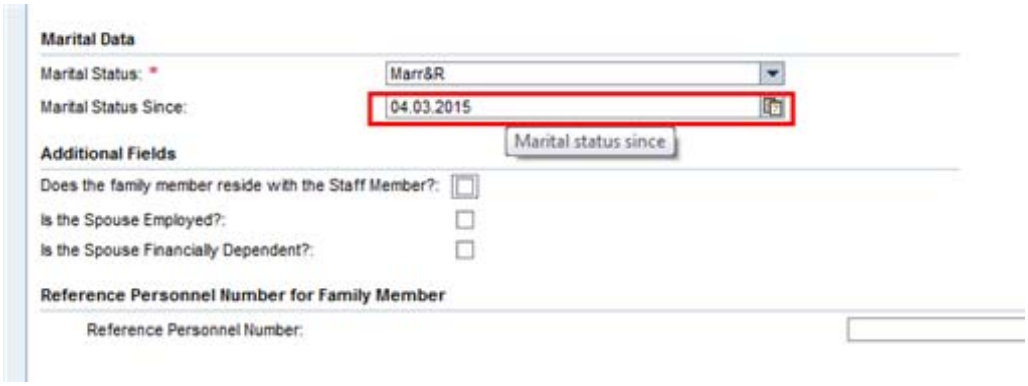
12. Click on the drop down menu to select the UN recognized nationality of your spouse. If your spouse has more than one nationality, select the nationality s/he will be using for visa/travel purposes.

Family Data Application



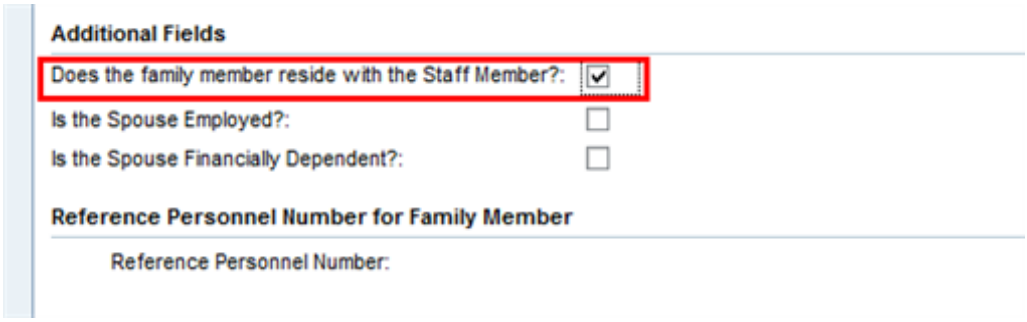
13. Click on the drop down menu and select your spouse's marital status. In this demonstration, "Marr&R" (Married and Related) is selected.

Family Data Application



14. Select or enter the Marital Status since date, using the DD.MM.YYYY format. This is the date of marriage as it appears on the marriage certificate.

Family Data Application



15. If your spouse resides with you, select the "Does the family member reside with the Staff Member?"

Family Data Application



16. If your spouse is employed, select "Is the Spouse Employed?". Additional fields about your spouses' employment will appear next to the Marital Data section above.

If your spouse is employed you will need to complete additional information about their employment and income.

Family Data Application



17. Click on the drop down menu and select the Employer Type from the list. In this demonstration, the spouse is employed outside the UN.

Family Data Application



18. Click on the drop down menu and select the Work Duty Station from the list. In this demonstration, the spouse is employed in "New York".

Family Data Application



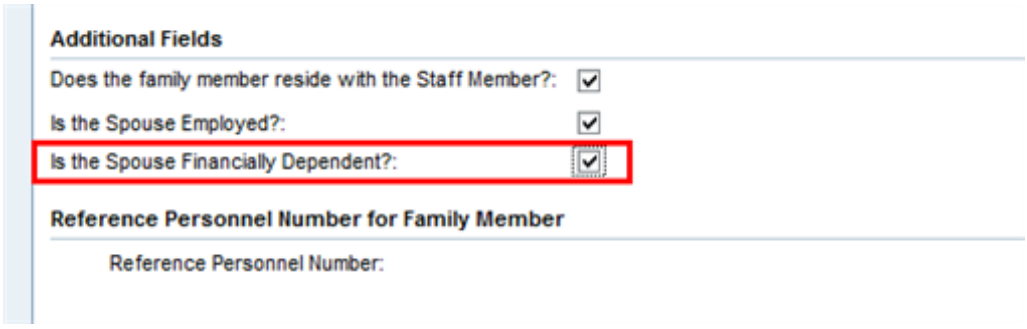
19. Enter the spouse's Employer Name. In this demonstration, the spouse works for Crowne Plaza.

Family Data Application



20. Enter your Spouse's Annual Earnings for the current year. In this demonstration the spouse earns $25,000 USD. Remember you will have to attach the annual wage statement of the spouse.

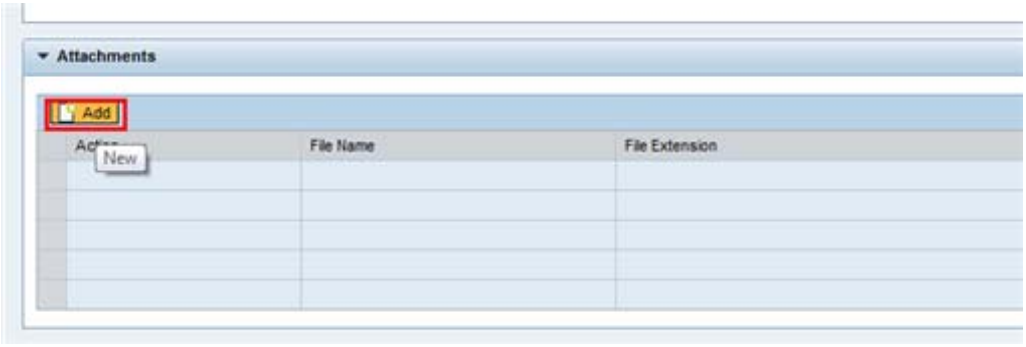
Family Data Application



21. If your spouse is financially dependant on you, select "Is the Spouse Financially Dependent?"

The amount entered will be used to determine the dependency.

Family Data Application



22. Click on the Add button to attach ALL the required documents, pertaining to this request that have been previously verified by an HR partner or HR administrator. Be sure to upload only the copies that have the verification stamp.

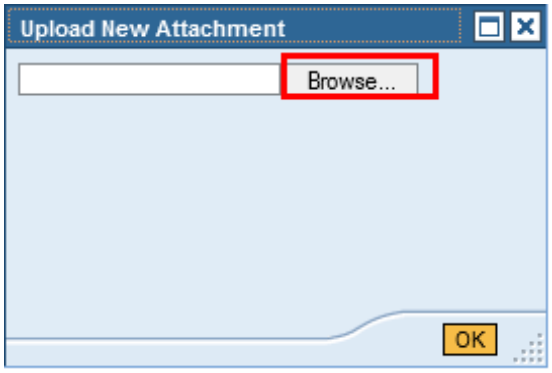
Please note, if this request is incomplete and all required documents with the verification stamp are not attached, the HR Partner will reject your request and you will need to submit a new request.

For this demonstration, you will be attaching:

- **your spouse's annual wage statement**
- **marriage certificate**
- **the biographic data page of your spouse's valid passport**

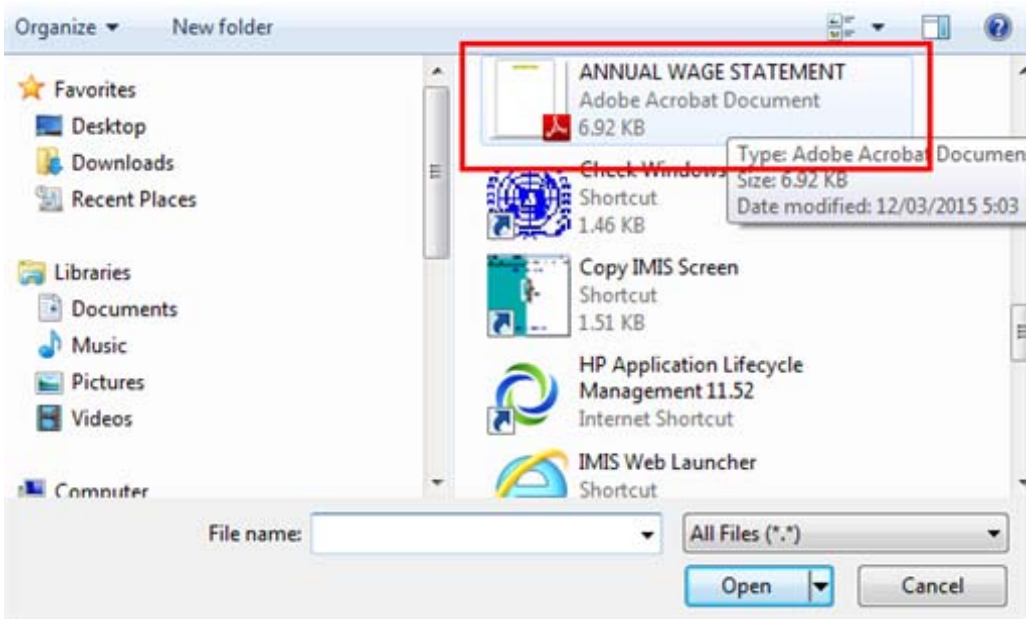
Consult the list of requirements at the beginning of the Quick Reference and Factsheets for other types of cases/situations.

Upload New Attachment



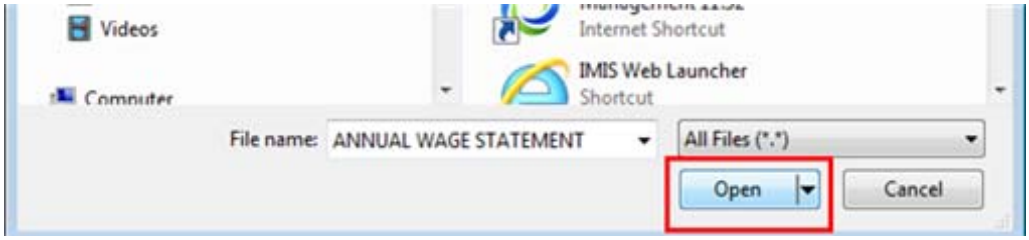
23. Click on the Browse button. The Choose File to Upload window will open.

Choose File to Upload



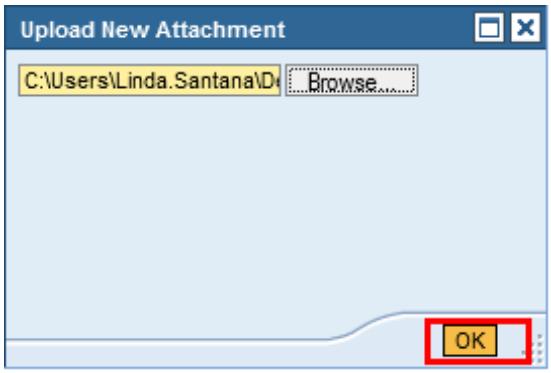
24. Select the required document. You should only upload PDF files.

Choose File to Upload



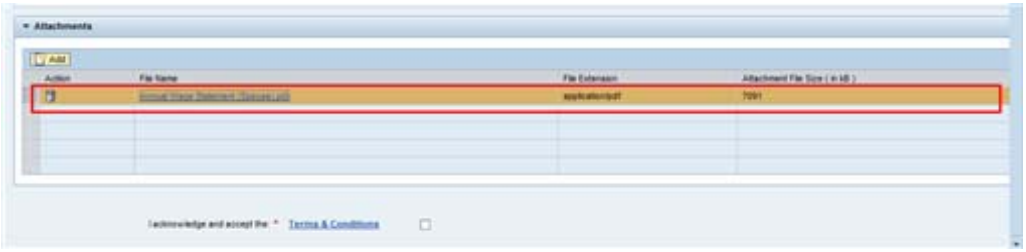
25. Click on the Open button.

Upload New Attachment



26. Click on the OK button to upload the document.

Family Data Application

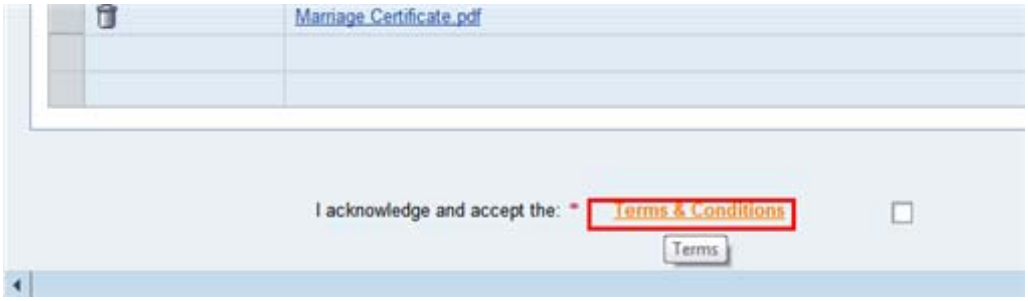


27. The document has been attached. Repeat the steps for each required document.

Remember: You must submit the original required documents to the HR Partner or HR Administrator for verification prior to making the ESS submission. The HR Partner will only approve requests that contain complete documentation or documentation that has been stamped as verified and seen by an HR Partner or HR Administrator.

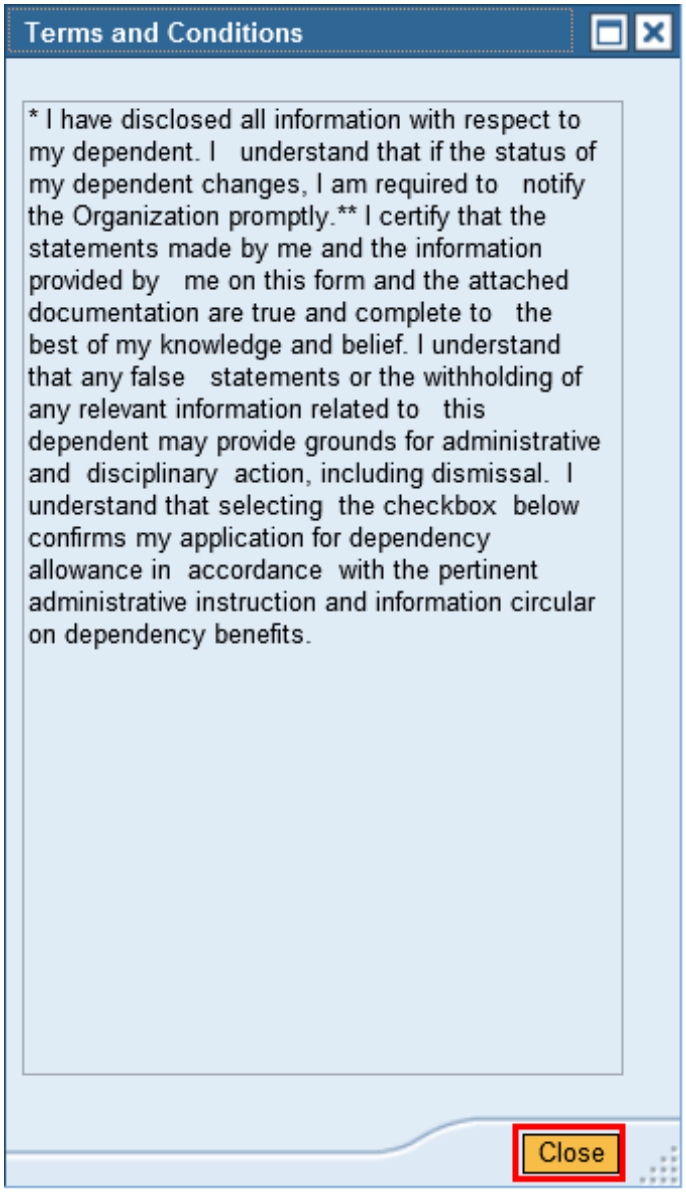
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Family Data Application



28. Click on the Terms & Conditions link and review the information.

Terms and Conditions



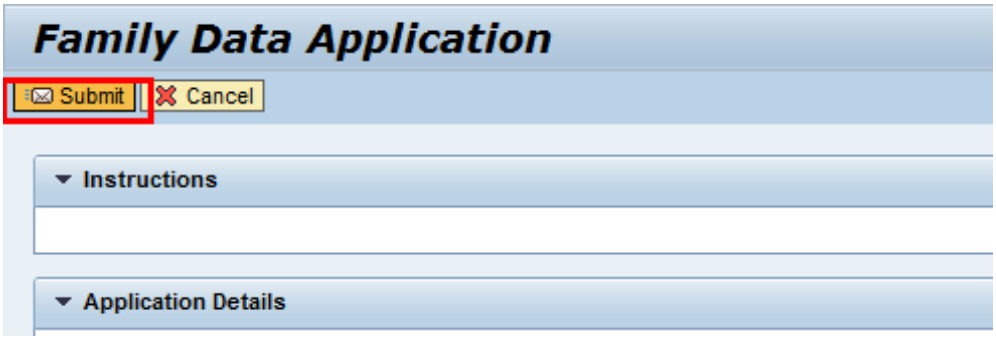
29. Once you have read the Terms and Conditions, click on the lick Close button Close button to return to the Family Data Application.

Family Data Application



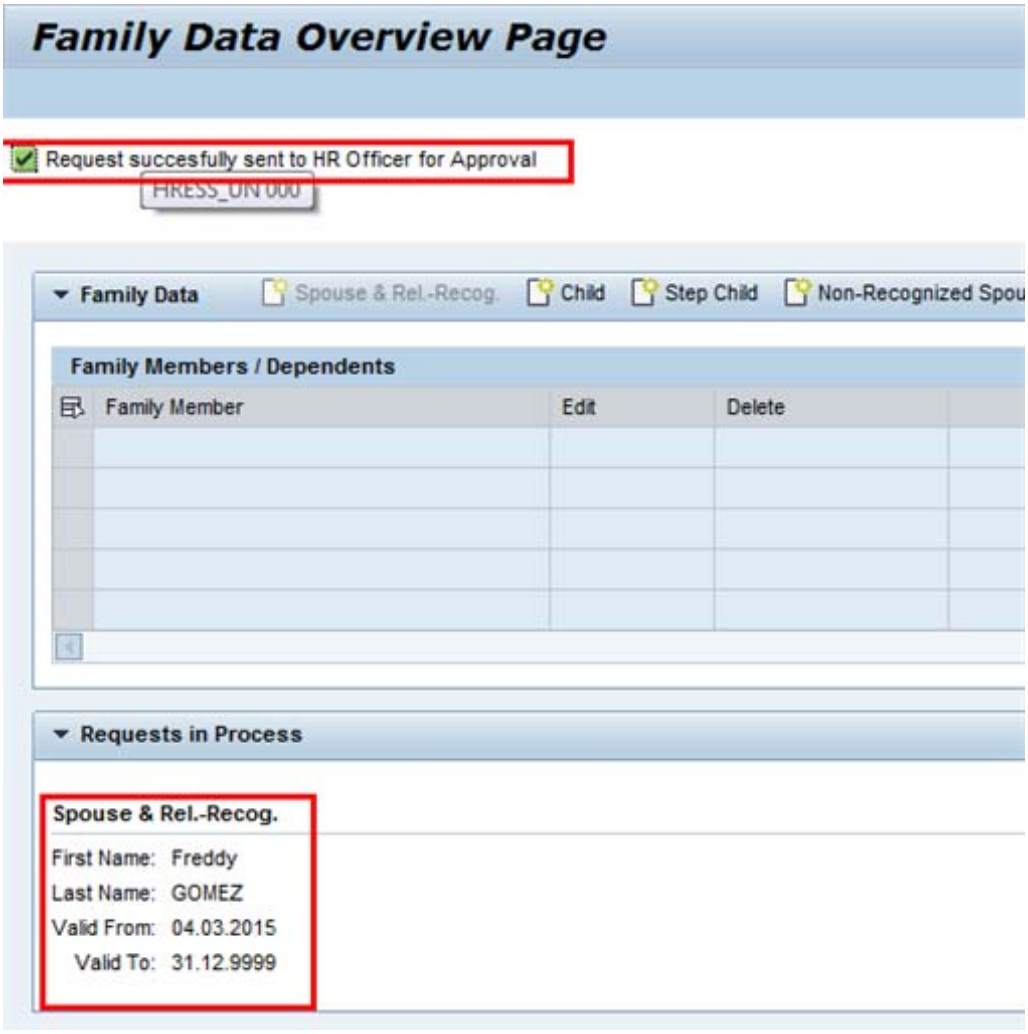
30. Click on the checkbox to acknowledge and accept the Terms & Conditions.

Family Data Application



31. Click on the Submit button.

Family Data Overview Page



32. A message will appear indicating the submission was successful and the submission will appear in the "Requests in Process" until it is approved by the HR Partner. Click on the Employee Self-Service SM tab to return to the Employee Services menu.

Remember, you have 30 days from the date the spouse became a dependant to enrol them into the insurance plan (medical and dental).

Purpose

This procedure is used by the ***Staff Member*** to add a child (biological, adopted or step child) as a household member and/or dependant. The determination as to whether the child becomes a household member or dependant will be made by the HR partner based on the information you provide in this transaction. The procedures for either situation is the same.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

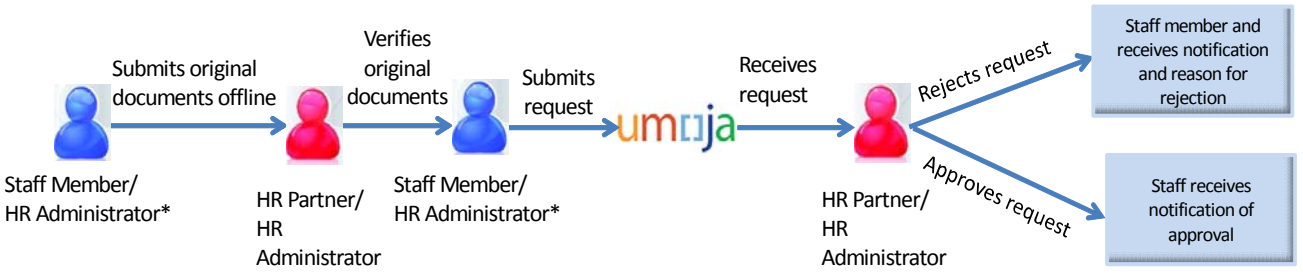
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.



1. ***Staff member*** presents offline all original documentation to the ***HR Partner*** or ***HR Administrator***.

2. ***HR Partner*** or ***HR Administrator*** verifies original documentation.
3. ***Staff member*** submits a request to add a household member and dependant through the Umoja Employee Self-Service portal. All required documents that have been verified by the ***HR Partner*** are attached to the submission
4. ***HR partner*** reviews the request.
   a. If the ***HR partner*** approves the submission. The child appears in the ***staff members'*** **Family Members/Dependents** list.
   b. If the ***HR partner*** rejects the submission. The ***staff member*** is notified and the request is removed from the **Request in Process** section. The ***staff member*** must create a new request with the correct information and submit it for approval.

Pre-requisites

1. Present required documents to ***HR Partner*** prior to submitting request. for verification of originals.
2. Pre-requisites for establishing the child as a household member and dependant:
   - **Birth certificate** showing the relationship to the staff member (biological, step child or adopted parent);
   - **Adoption papers , if applicable,** stating that the child has been legally adopted by the staff member and they have custody rights;
   - **Divorce or custodial papers** stating that the staff member or the spouse (in case of step children) has custody rights of the child.
   - **Educational institution registration** stating the child is attending a full-time educational program, this only applies to children between the ages of 18-21 years.
   - **Certification from the UN medical** services that the child's condition is a disability. You submit confidential medical reports offline to the UN Medical Service asking them to review for Special dependency. Medical services will send the certification to you offline, which then you will submit to the HR Partner.

Objectives

As part of the demonstration, we will show you:

- How to complete the request form to claim a child as a household member and dependent.

Scenario

A ***Staff Member*** has a newborn child born on 01 March 2015 and wants to claim the child as a household member and dependant.

Menu Path

Requests to add a child as a household member and dependant can be enter using any one of the following menu paths:

- **Employee Self-Service>Personal Information**
- **Employee Self-Service>Entitlements**
- **Employee Self-Service>Life and Work Events**

You may use any of the three routes to access the dependency page, but for this demonstration, the request will be entered using the **Employee Self-Service>Entitlements** menu path.

Procedure

1. Start the transaction using the menu path

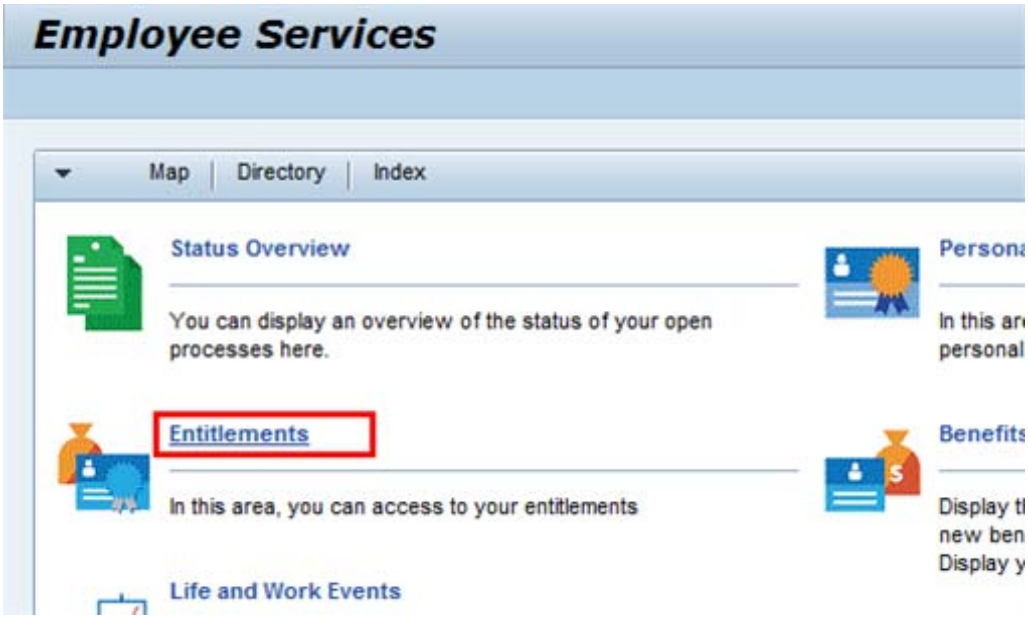
Employee Self-Service>Entitlements>Check Entitlement Eligibility

Overview - Umoja qa portal - Q3J - Windows Internet Explorer



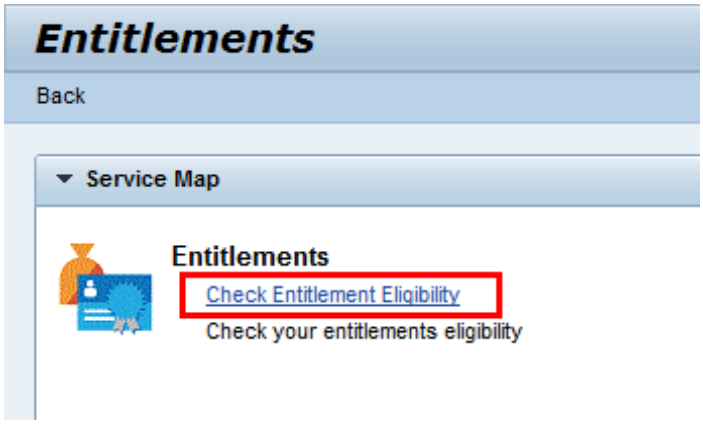
2. Click on the **Employee Self-Service SM** tab.

Employee Services



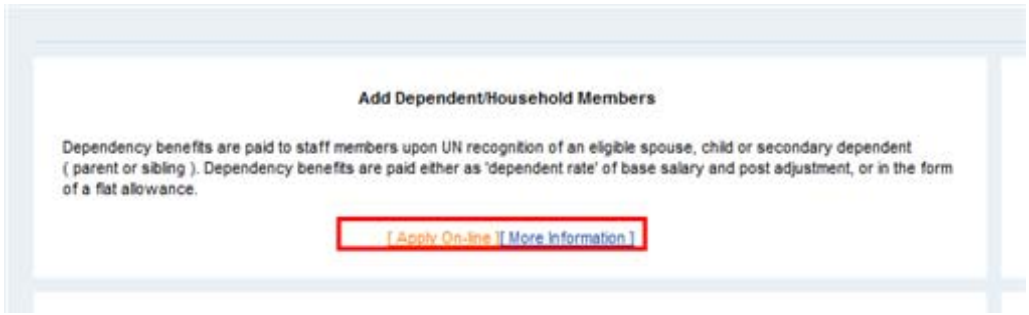
3. Click on the Entitlements link.

Entitlements



4. Click on the Check Entitlement Eligibility link.

Entitlement Summary Launch Page



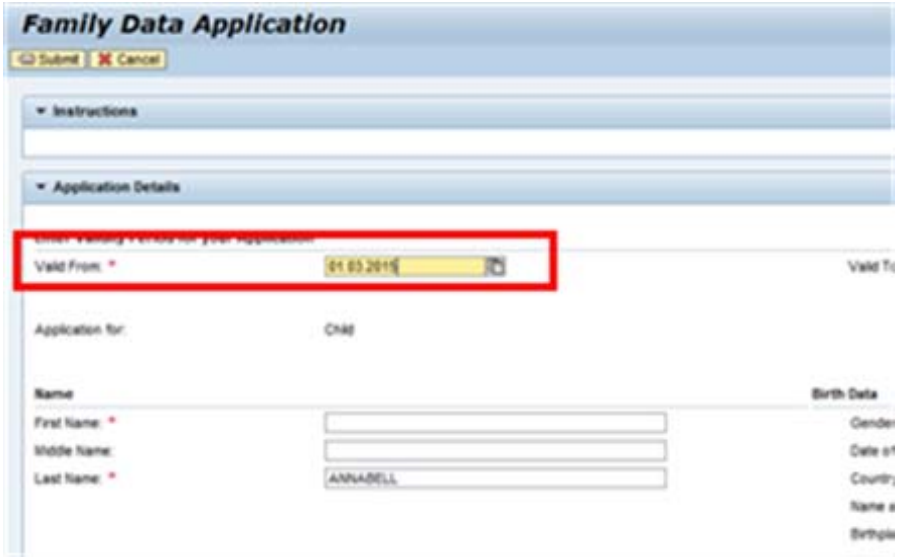
5. In the *Add Dependent/Household Members* section, click on the Apply On-line link.

Family Data Overview Page



6. Click on the **Child** tab to add a child.

Family Data Application

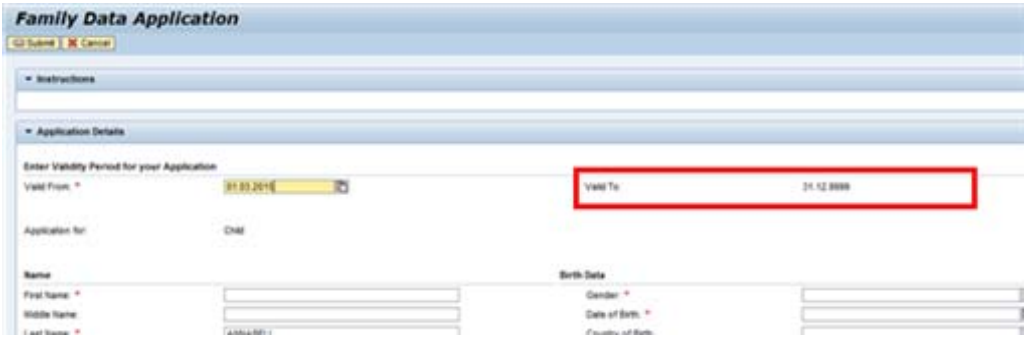


7. Select or enter a **Valid From** date, using the DD.MM.YYYY format. In this demonstration we are entering 01.03.2015 as the Valid From date.

The **Valid From** date should be:

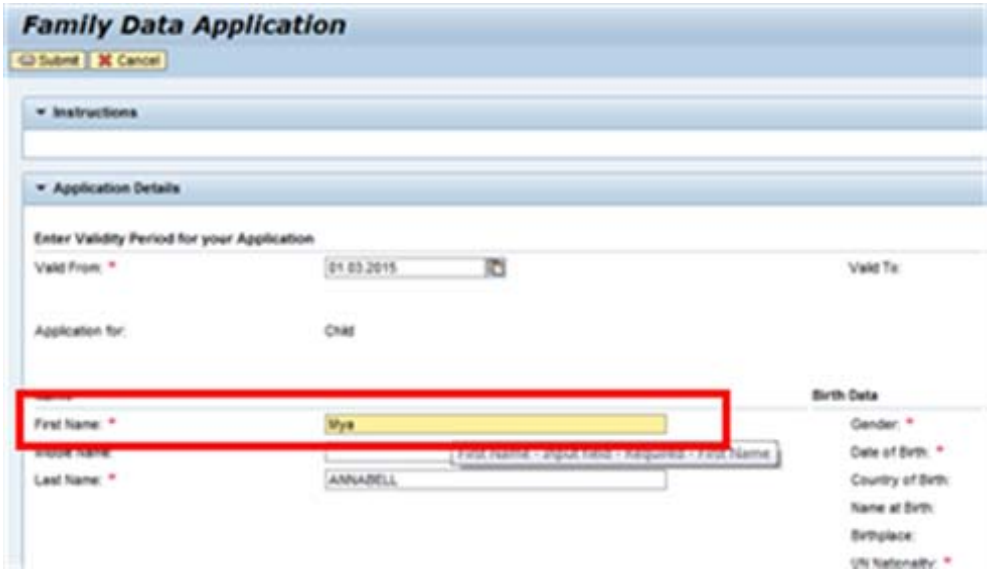
- For a newborn child, the date would be the child's date of birth;
- For an adopted child, the date would be the date when the child was legally adopted;
  - For a step child, the date of the marriage to the biological parent of the child, provided the child lives with you; OR
  - Your Entry on Duty date, if you are submitting the request after you were appointed or reappointed and your HR Partner did not add your child(ren) as dependants at the time of your appointment.

Family Data Application



8. The Valid To date automatically defaults to 31.12.9999.

Family Data Application

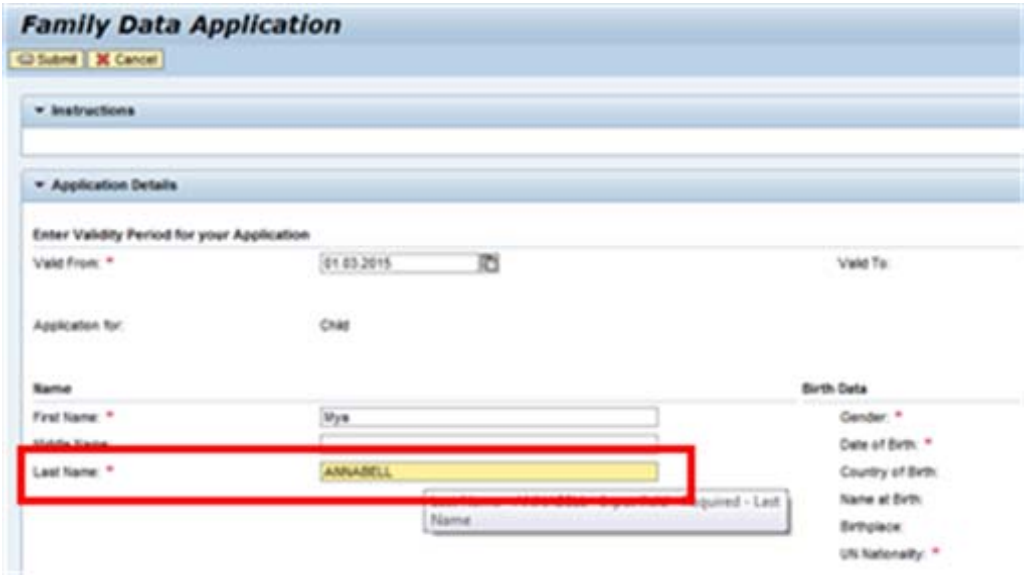


9. Type the child's First Name exactly as it appears on the birth certificate or passport. Do not abbreviate or omit names. If the child has a middle name that also appears on the birth certificate or passport, enter that name as well.

If the child has more than one nationality, enter the name exactly as it is spelled in the passport that will be used to obtain visas and travel for UN purposes.

In this demonstration we will enter the first name "Mya"

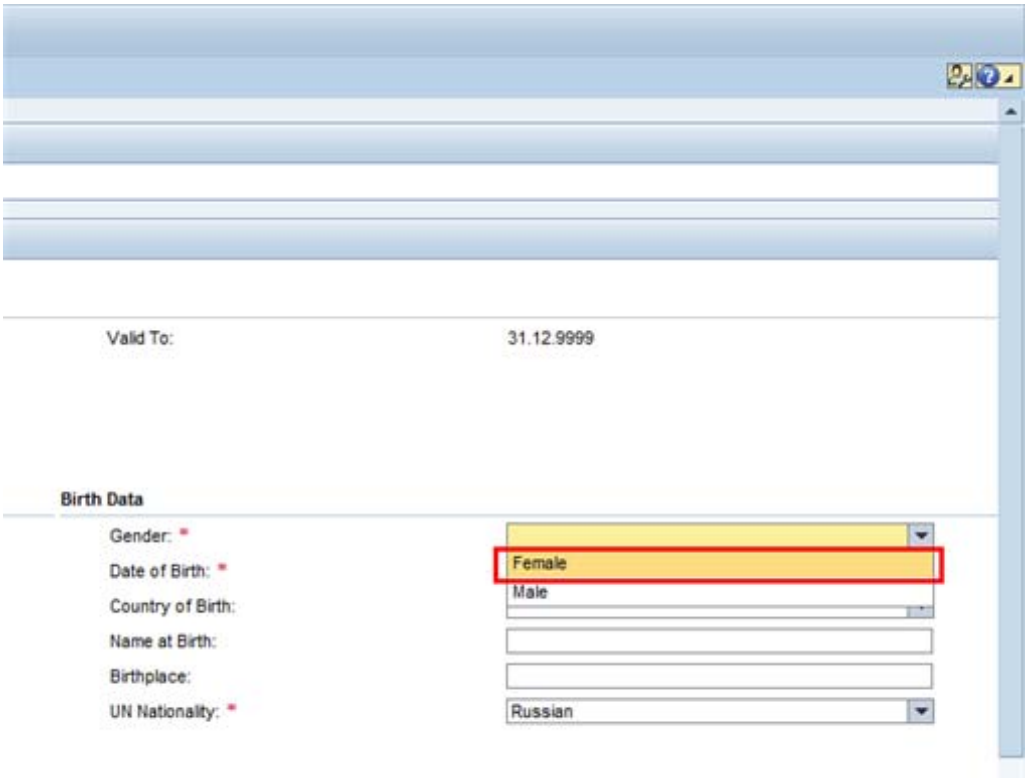
Family Data Application



10. The Last Name defaults to the staff member's last name. If it is different, enter the child's last name (in all capital letters) exactly as it appears on the birth certificate or passport. Do not abbreviate or omit names. In this demonstration, the child has the same last name as the staff member.

In this demonstration we will leave the default last name "Annabell"

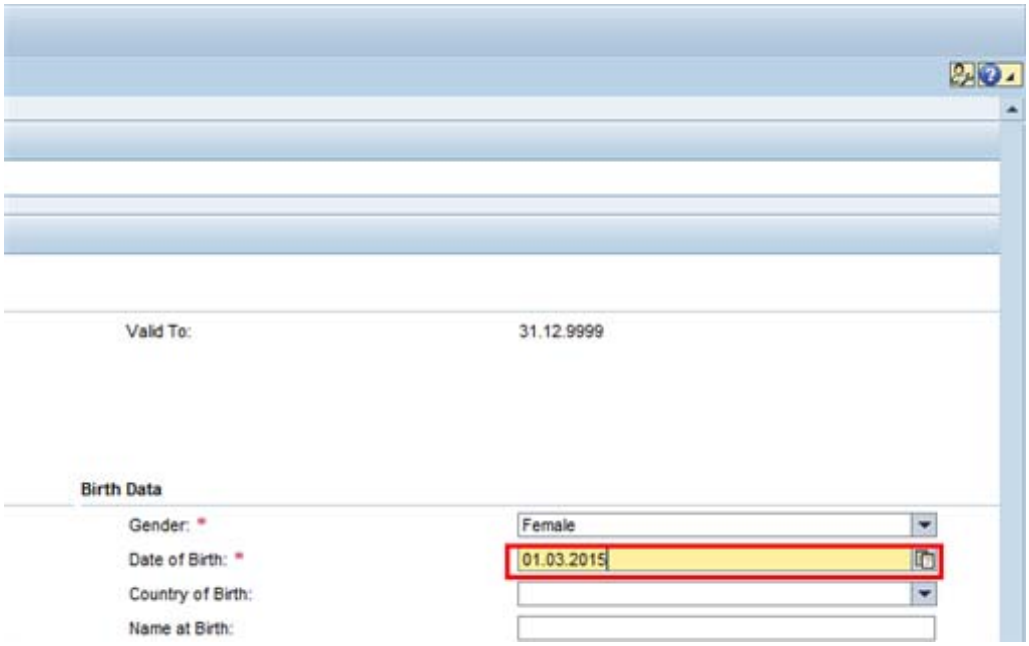
Family Data Application



11. Click on the drop down menu and select the child's gender.

In this demonstration the child is "Female".

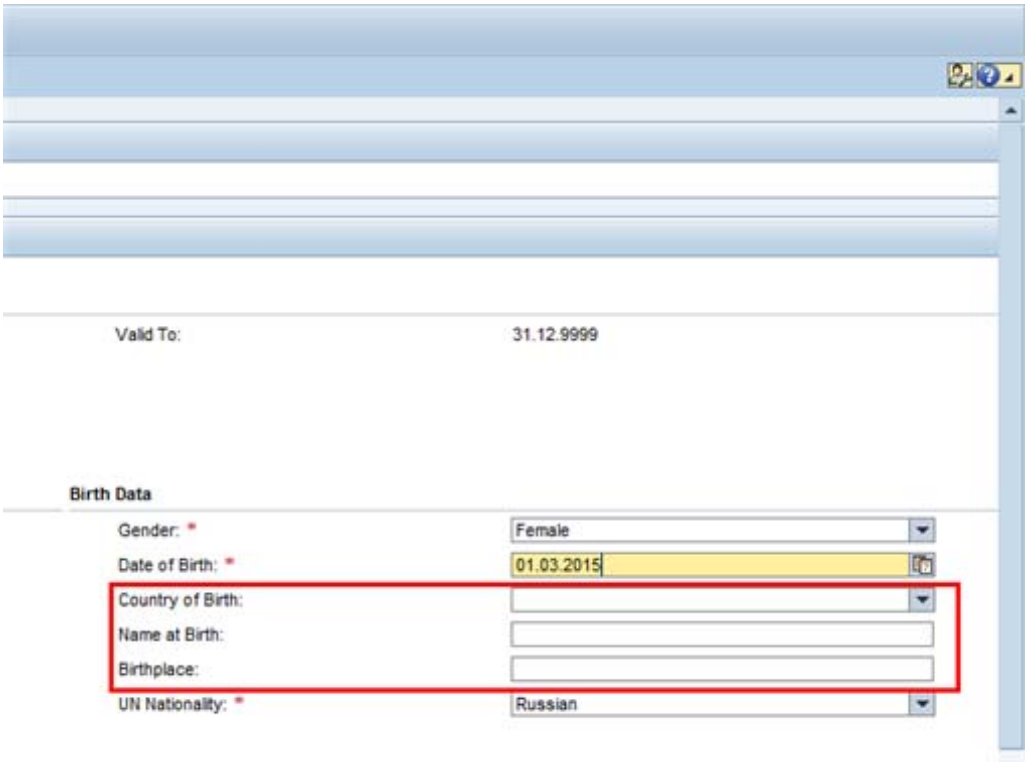
Family Data Application



12. Select or enter the child's date of birth using the DD.MM.YYYY format, as it appears on the birth certificate.

In this demonstration we will enter "01.03.2015"

Family Data Application



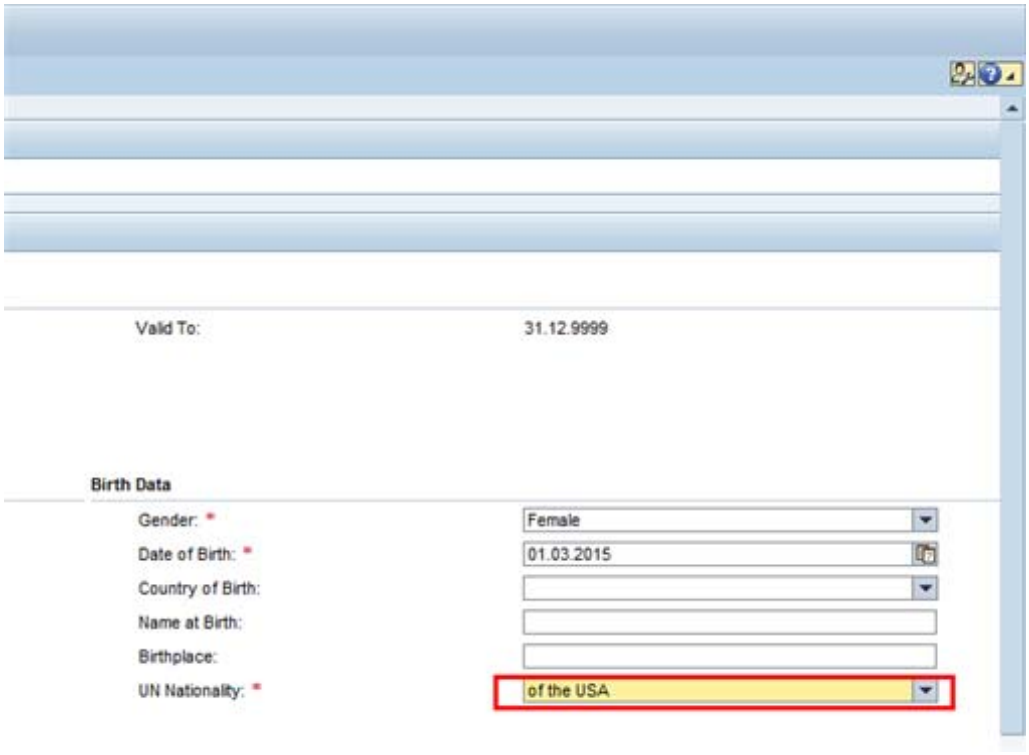
13. Even though it is not mandatory to complete the next three fields, it is suggested that you provide as much information as possible.

Country of Birth - select from the list the country the child was born in.

Name at Birth - enter the first, middle and last name of the child as it appears on their birth certificate or passport, if applicable such as in the case of adoption.

Birthplace - enter the city the child was born in.

Family Data Application



14. Click on drop down menu and select the UN recognized nationality of the child, for UN purposes, only one nationality is recognized. If the child has more than one nationality. Enter the name exactly as it is spelled in the passport that will be used to obtain visas and travel for UN purposes.

Family Data Application



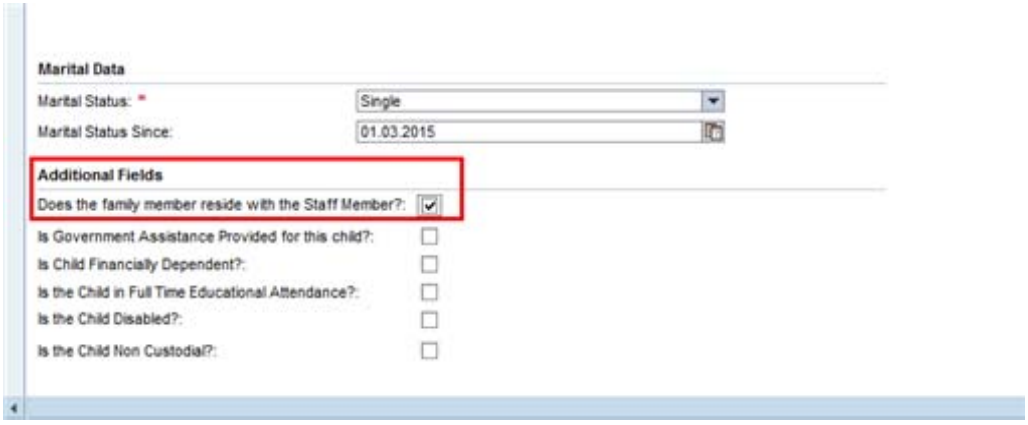
15. Click on drop down menu and select the child's marital status. In most cases, this will be Single.

Family Data Application



16. Select or enter the Marital Status Since date using the DD.MM.YYYY format. In most cases this will be the child's date of birth as it appears on their birth certificate.

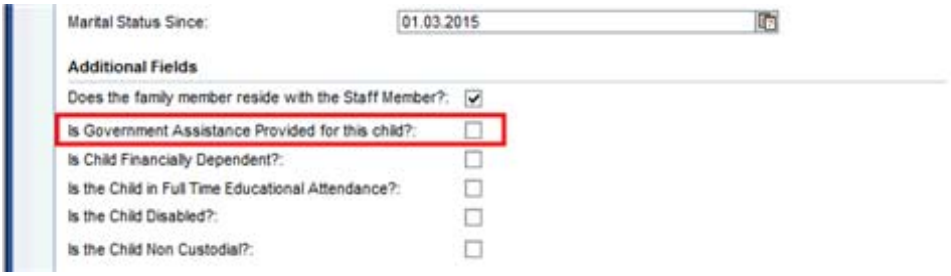
Family Data Application



17. Click on the check box if the child resides with the staff member, if no leave blank.

In this demonstration the child resides with the staff member.

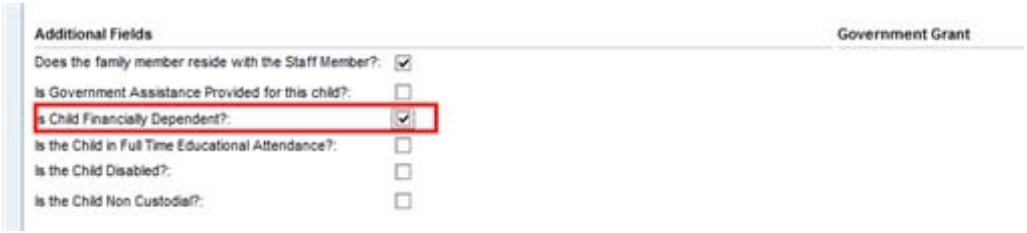
Family Data Application



18. Indicate whether the child receives government assistance. If you select YES, additional fields will pop up and you will be required to enter the amount of government assistance the child received and the currency.

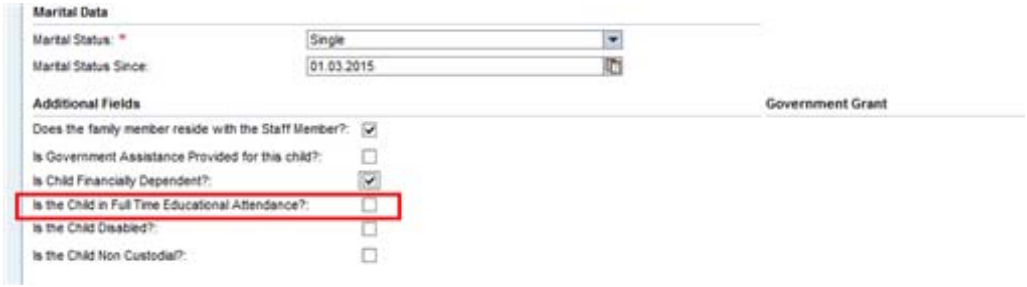
In this demonstration the child does not receive government assistance.

Family Data Application



19. Click on the checkbox if the child is financially dependent on you. Proof of support is required if the child does not live with you and you are not the custodial parent.

Family Data Application



20. Click on the checkbox if the child is between the age of 18 and 21 yrs and in full time school attendance. Proof of school attendance is required.

In this demonstration the child is not between the age of 18 and 21 yrs.

Family Data Application



21. Click on the checkbox if the child is disabled. Medical certification must be obtained from the Medical Services Department.

When you click this box, the HR partner will review the request for special dependency. Special dependency can be granted only after confirmation by the Medical Service that your child's condition is considered to be a disability. Therefore, if you plan to click this checkbox, please note that you should already have a certification of disability from the UN Medical Services.

If you have not submitted the confidential medical reports offline to the UN Medical service and obtained their approval of disability, you may leave this box unchecked. The HR partner will review this request for dependency and you may make an amendment to this submission to request special dependency once the certification of disability is obtained.

In this demonstration the child is not disabled.

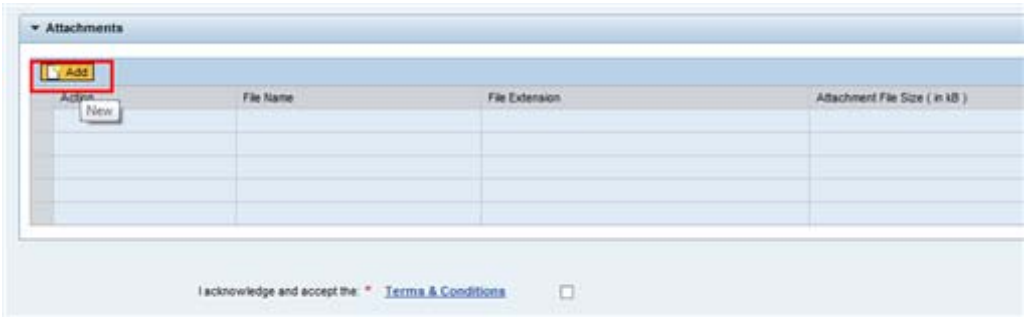
Family Data Application



22. Click on the checkbox if you do not have custody of the child.

In this demonstration the staff member has custody of the child.

Family Data Application



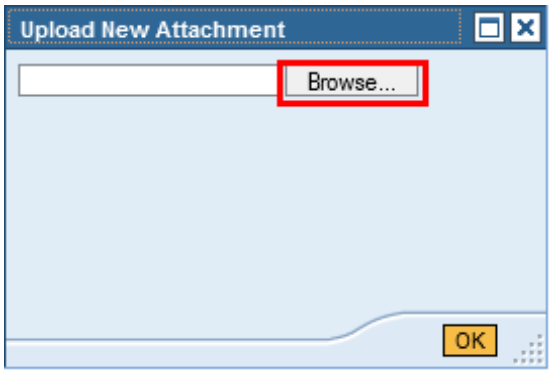
23. Click on the Add button to attach ALL the required documents that have already been seen and verified by the HR Partner HR Administrator. Be sure to upload only the copies with the verification stamp.

In this demonstration you will be attaching the child's birth certificate.

Please note, if this request is incomplete and all the required documents with the verification stamp are not attached, the HR Partner wil l reject your request and you will need to submit a new request.

Consult the list of requirements at the beginning of the Quick Reference and Factsheets for other types of cases/situations.

Upload New Attachment



24. Click on the Browse button. The Choose File to Upload window will open.

Choose File to Upload



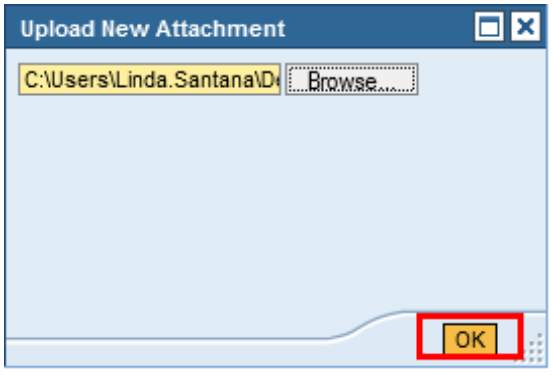
25. Select the required document. You should only upload PDF files.

Choose File to Upload



26. Click on the Open button.

Upload New Attachment



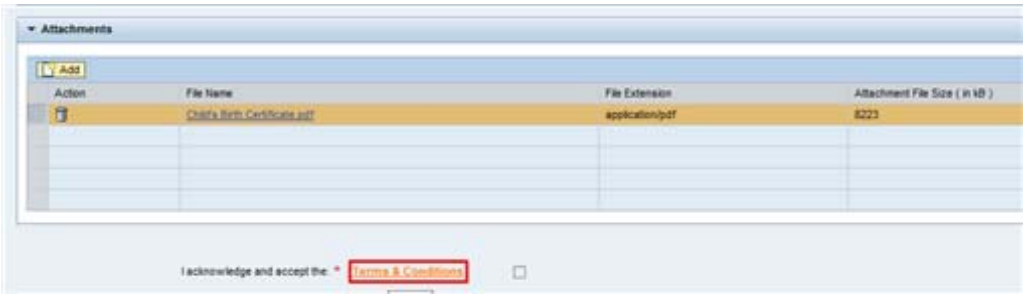
27. Click on the OK button to upload the document.

Family Data Application



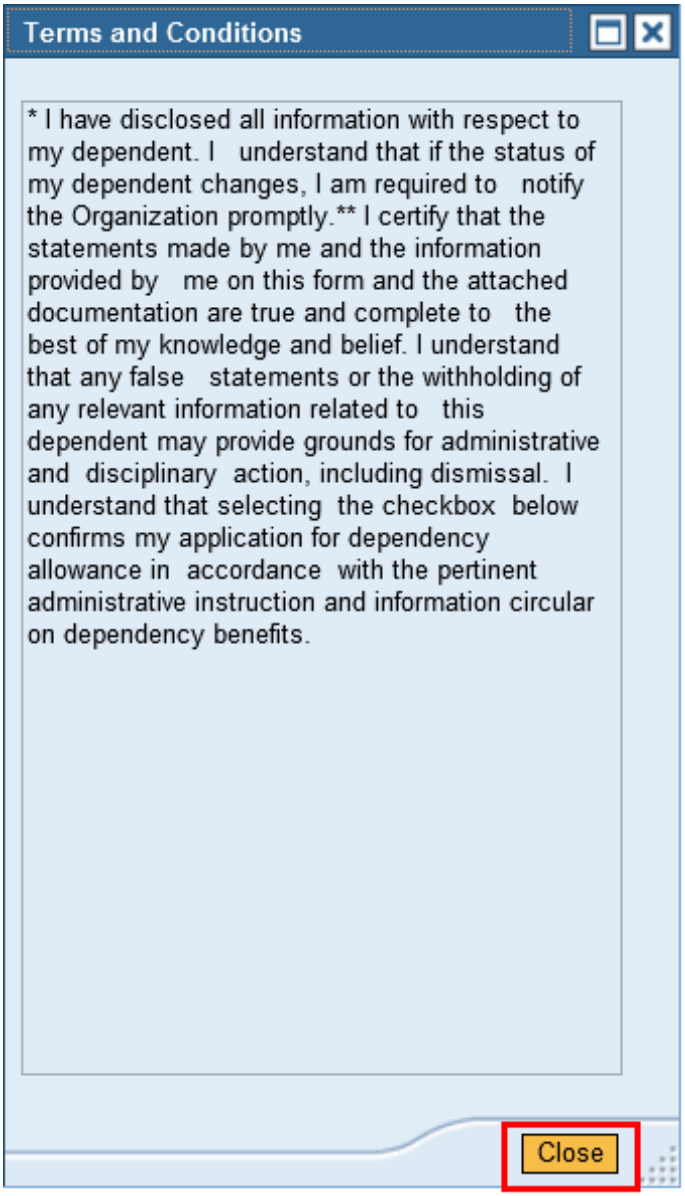
28. The document has been attached. Repeat the steps for each required document.

Family Data Application



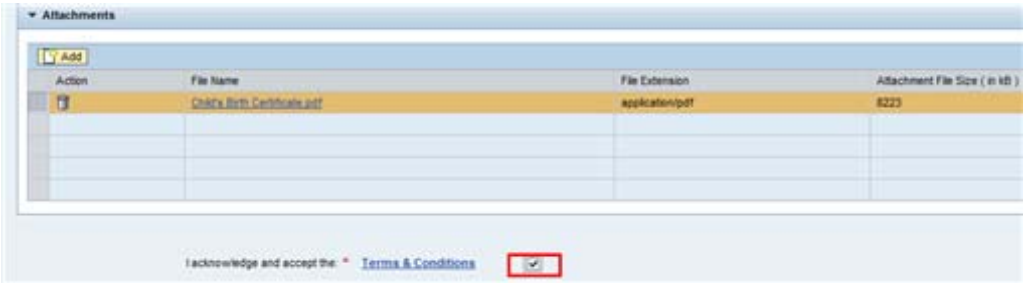
29. Click on the Terms & Conditionslink and review the information.

Terms and Conditions



30. Review the Terms and Conditions and click on the **Close** button when done.

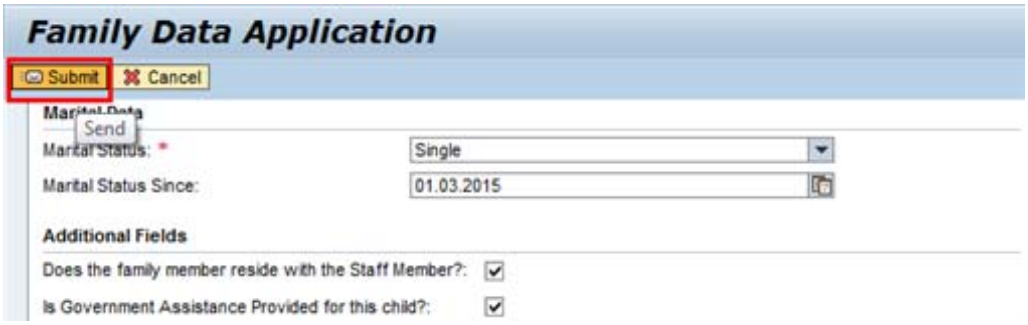
Family Data Application



31. Click on the checkbox to acknowledge and accept the Terms & Conditions.

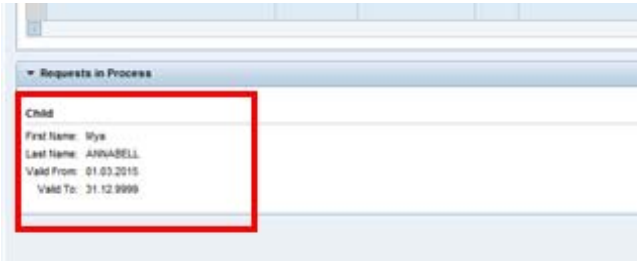
Remember: You must submit the original required documents to the HR Partner or HR Administrator for verification prior to making the ESS submission. The HR Partner will only approve requests that contain complete documentation or documentation that has been stamped as verified and seen by an HR Partner or HR Administrator.

Family Data Application



32. Click on the **Submit** button.

Family Data Overview Page



33. Any submissions will appear in the Requests in Process section until they have been approved by the HR Partner.

Remember: you have 30 days from the date the child becomes a dependant to enrol them into the insurance plan (medical, dental and life).

Purpose

This procedure is used by the ***Staff Member*** to add a Father, Mother or Sibling as a household member or secondary dependant. They can be added as a secondary dependant provided you are not claiming your spouse as a dependant.

Reference

Factsheets contain additional information on the different eligibility and documentation requirements for this subject.

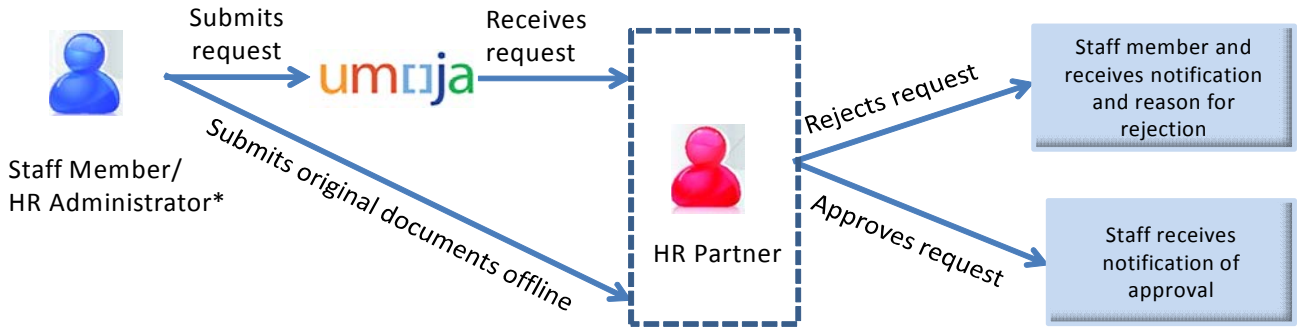
This quick guide, the simulation and the factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.



1. Staff member completes the information about the household member or secondary dependant.

2. ***Staff member*** attaches all required documents in the ESS portal.
3. ***Staff member*** submits the original documentation offline to the ***HR Partner***.
4. ***HR partner*** verifies and reviews submitted documents.
   a. If documents are in order, the ***HR partner*** approves the submission. The household member or secondary dependant appears in the staff members **Family Members/Dependents** list.
   b. If documents are not in order, the ***HR partner*** rejects the submission. The ***staff member*** is notified and the request is removed from the Request in Process section. The ***staff member*** must create a new request with the correct information and submit it for approval.

Pre-requisites

For establishing a parent or sibling as a Household member

- Parent's official birth certificate
- Staff member's official birth certificate showing the relationship to the parent

For establishing a parent or sibling as a Dependant, the additional documents are required:

- Proof of financial support made directly to the secondary dependant, in the form of cancelled cheques, money order or wire transfer receipts or records of bank transactions. The secondary dependant must be reflected as the recipient on all proof of payment. Staff member must provide one half or more of the dependant's support and, in any case, at least twice the amount of the dependency allowance.

Note: Verify that you are not in receipt of dependency allowance for a spouse.

Objectives

As part of the demonstration, we will show you:

- How to record your Father, Mother or Sibling as a household member.
- How to declare your Father, Mother or Sibling as a dependant.

Scenario

A ***staff member*** provides more than half of the financial support for his/her divorced Father who does not live with him/her. The ***staff member*** has not claimed their spouse as a dependant.

Menu Path

Requests to add a parent as a household member and dependant can be enter using any one of the following menu paths:

- **Employee Self-Service>Personal Information**
- **Employee Self-Service>Entitlements**
- **Employee Self-Service>Life and Work Events**

You may use any of the three routes to access the dependency page, but for this demonstration, the request will be entered using the Employee Self-Service>Entitlements menu path.

Procedure

1. Start the transaction using the menu path:

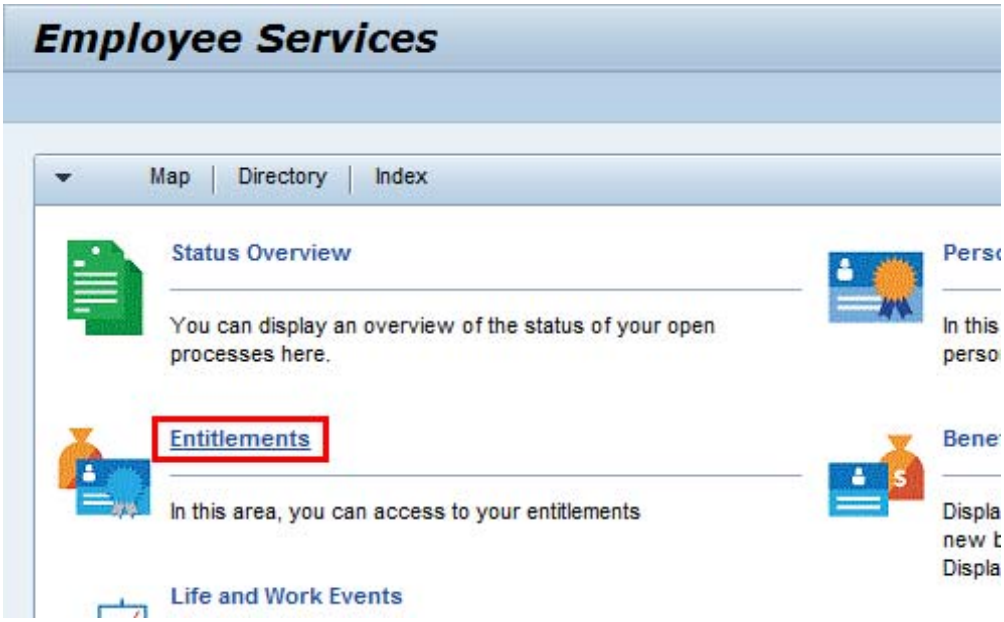
Employee Self-Service>Entitlements

Overview - Umoja qa portal - Q3J - Windows Internet Explorer



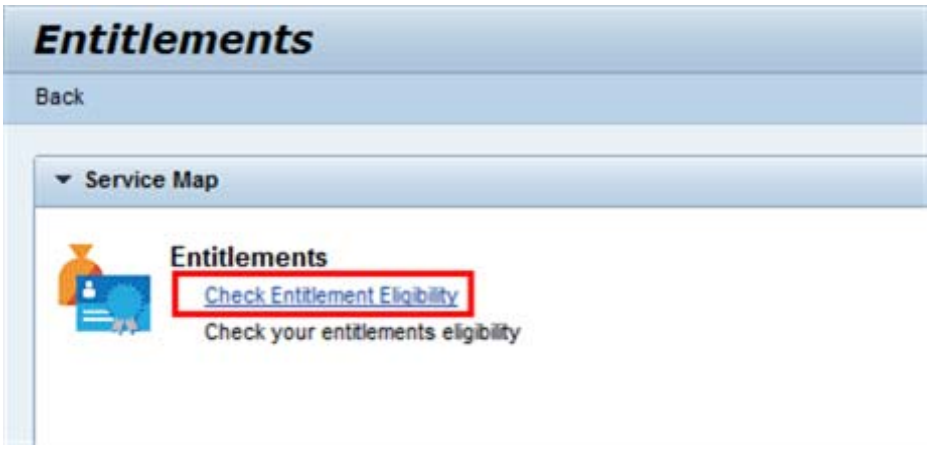
2. Click on the Employee Self-Service SM tab.

Employee Services



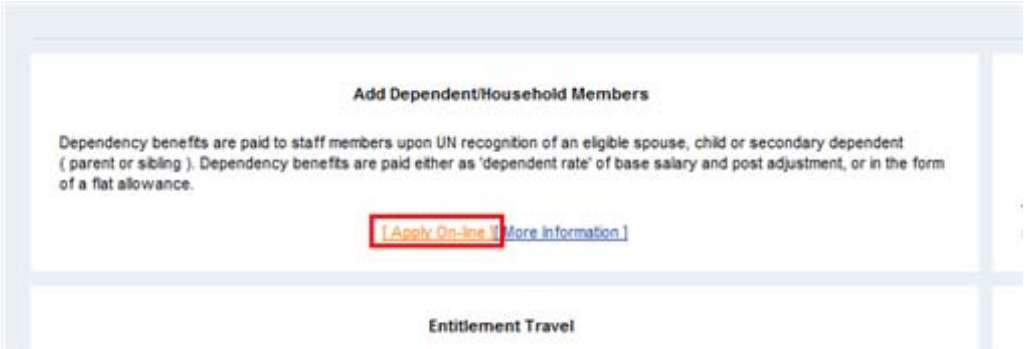
3. Click on the Entitlements link.

Entitlements



4. Click on the Check Entitlement Eligibility link.

NPO addon: Entitlement Summary Launch Page



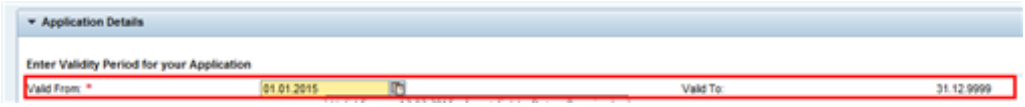
5. Click on the Apply On-line link.

Family Data Overview Page



6. Father, Mother and Sibling are considered secondary dependants and the steps to add them as household members or dependants are the same. In this demonstration, you will be adding your Father, click on the Father button.

Family Data Application



7. Select or enter a Validity Period, using the DD.MM.YYYY format.

For the FROM date, select or enter:

- January of the current year if the staff member was employed at that time and if they can provide either proof of financial support or proof of residency. (whichever is applicable)
- The Entry on Duty date if the staff member was appointed or reappointed after 1 January of the year in which the application is submitted.

For the TO date, select or enter:

- The date the parent will no longer be a dependant. If unknown, leave the default date of 31.12.9999.

Family Data Application



8. Enter the parent's First Name exactly as it appears on the official birth certificate or passport. Do not abbreviate or omit names.

Family Data Application



9. The Last Name defaults to the staff member's last name. Enter the parent's Last Name exactly as it appears on the official birth certificate or official passport. Do not abbreviate or omit names.

Family Data Application



10. Click on the drop down menu and select the parent's gender. In this demonstration, "Male" is selected.

Family Data Application



11. Select or enter the parent's date of birth using the DD.MM.YYYY format, as it appears on the official birth certificate or passport. Remember, you will be required to attach the birth certificate or passport. In this demonstration, "16 Aug 1947" is entered.

Family Data Application



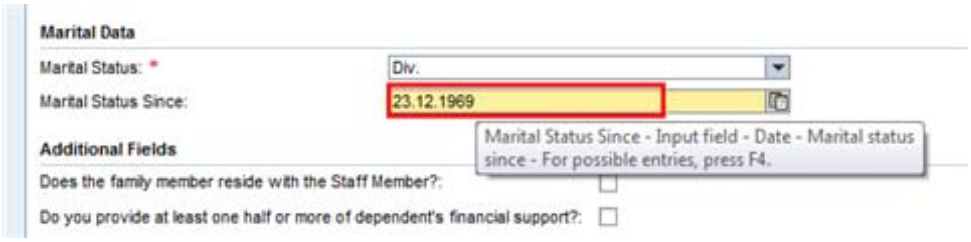
12. Click on the drop down menu to select the nationality of the parent, as it appears on the official birth certificate or passport. For UN purposes, only one nationality is recognized. If the parent has more than one nationality, submit the one with which they will travel/request visas. In this demonstration, the parent is a national of the "USA".

Family Data Application



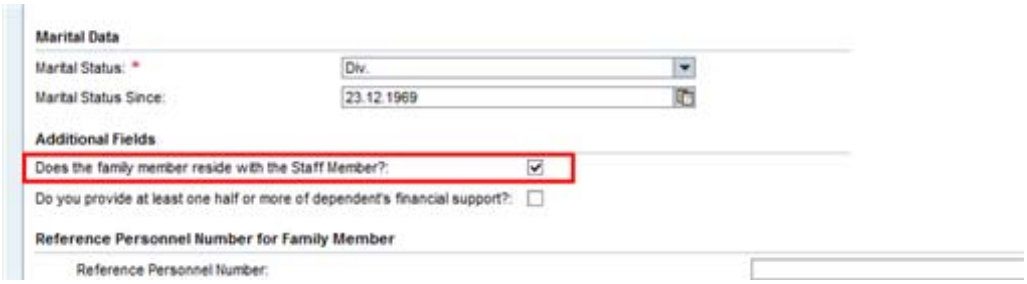
13. Click on the drop down menu and select the marital status of the parent. In this demonstration, the parent is "Div" (Divorced).

Family Data Application



14. Select or enter the Marital Status Since date using the DD.MM.YYYY format. In this demonstration, the parent has been divorced since "23 Dec 1969".

Family Data Application



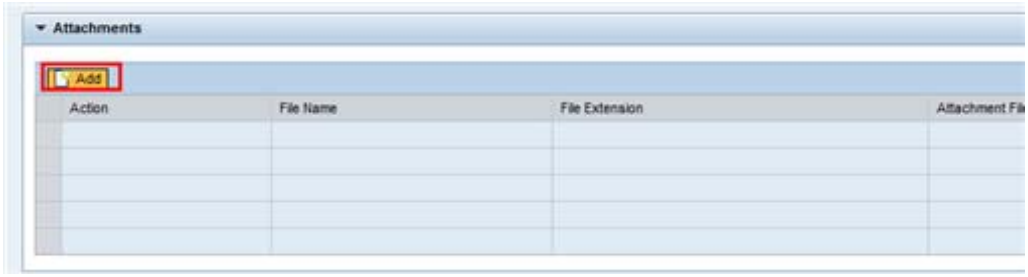
15. If your parent lives with you, select the box after the question "Does the family member reside with the staff member?' If that is the case you must attach proof of residence.

Family Data Application



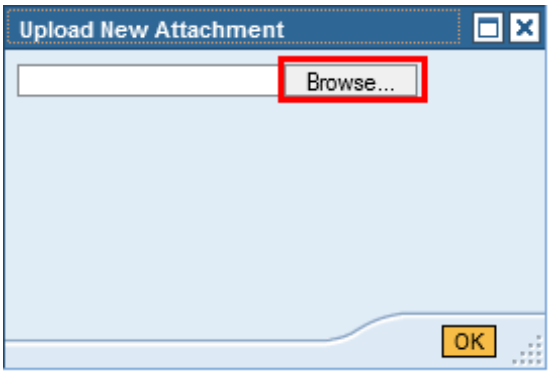
16. If you provide at least half of your parent's financial support select "Do you provide at least one half or more of dependent's financial support?". The answer to the question will determine whether your parent will be given the status of household member or dependent. Remember, if the parent does not reside with you, proof of financial support must be attached if you want to claim them as a dependent.

Family Data Application



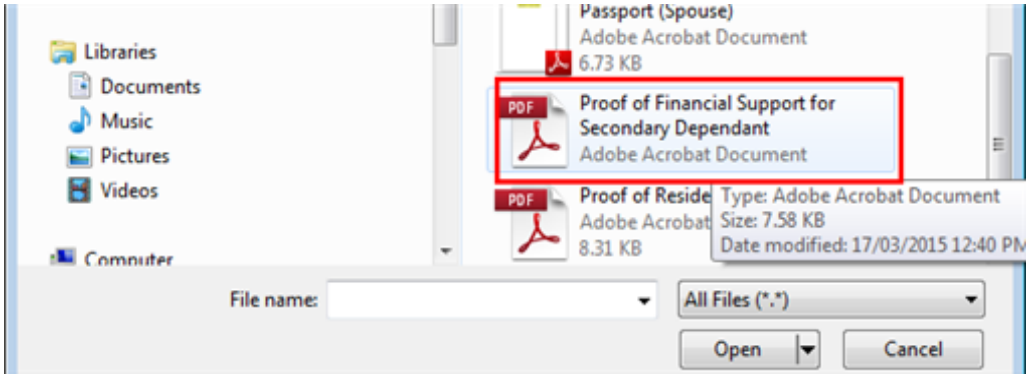
17. Click the Add button to attach ALL the required documents.

Upload New Attachment



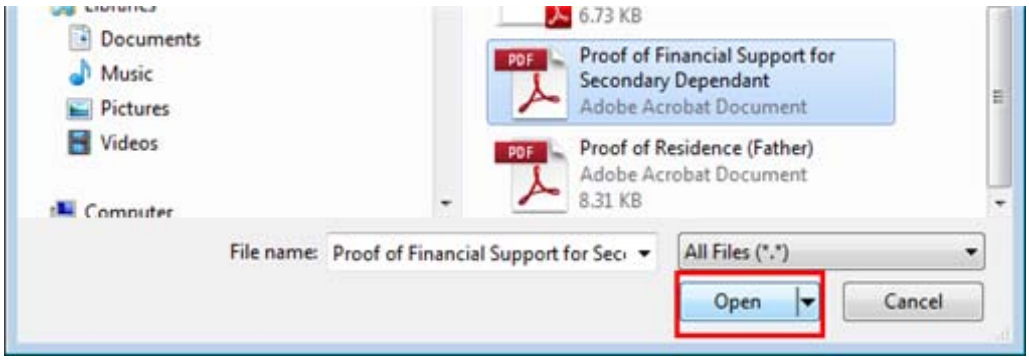
18. Click the Browse button, the Choose File to Upload window opens.

Choose File to Upload



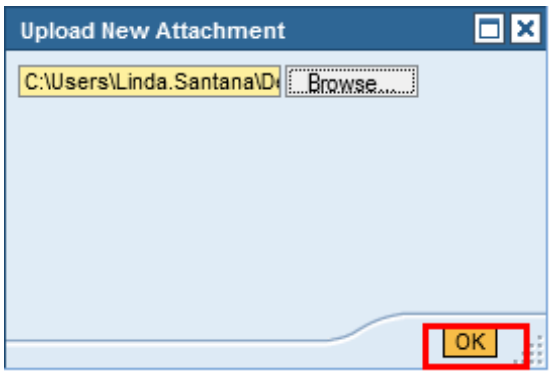
19. Select the required document. The document should be in a PDF format.

Choose File to Upload



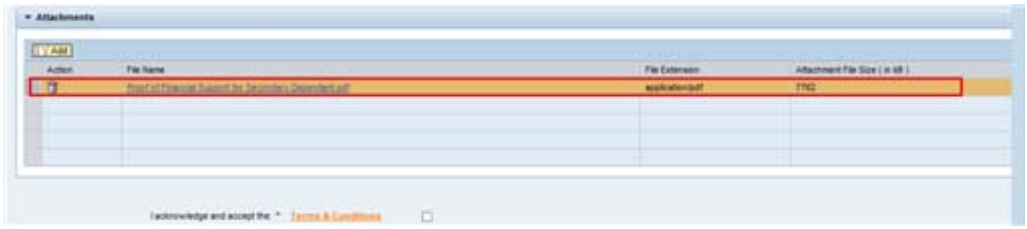
20. Click on the Open button.

Upload New Attachment



21. Click on the OK button to upload the document.

Family Data Application



22. The document has been attached. Repeat the steps for each required document.

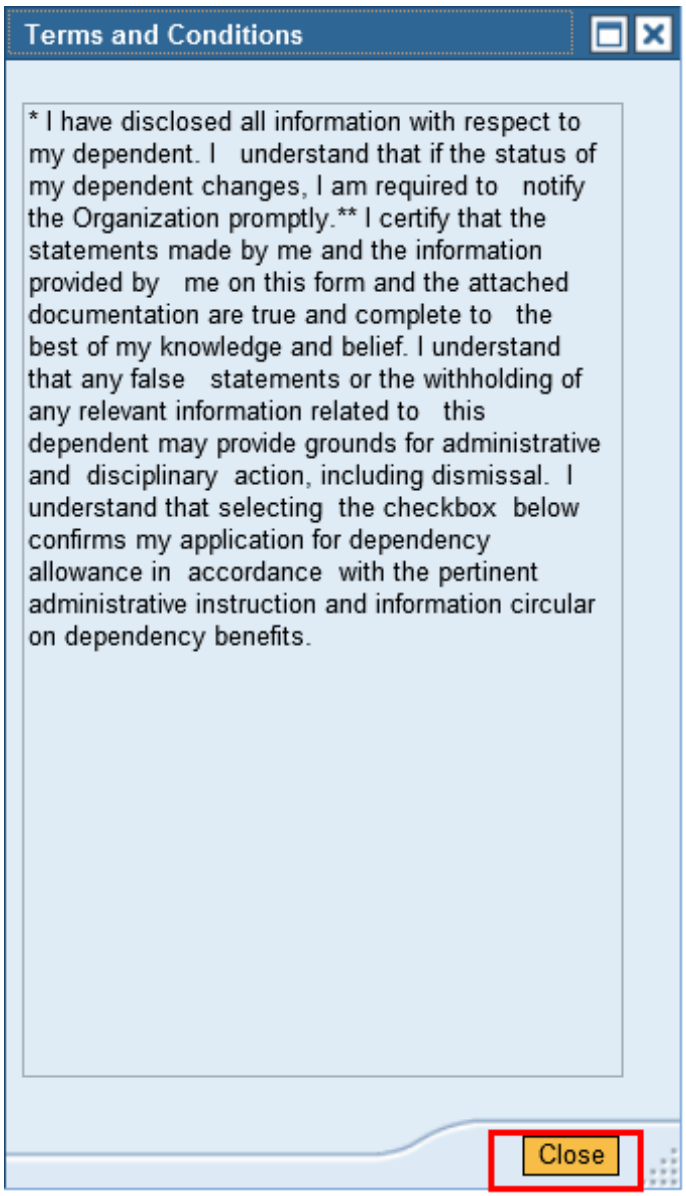
Remember that you must present original required documents to the HR Partner offline. The HR Partner will only approve your request upon receipt and review of ALL original documents submitted here.

Family Data Application



23. Click on the Terms & Conditions link and review the information.

Terms and Conditions



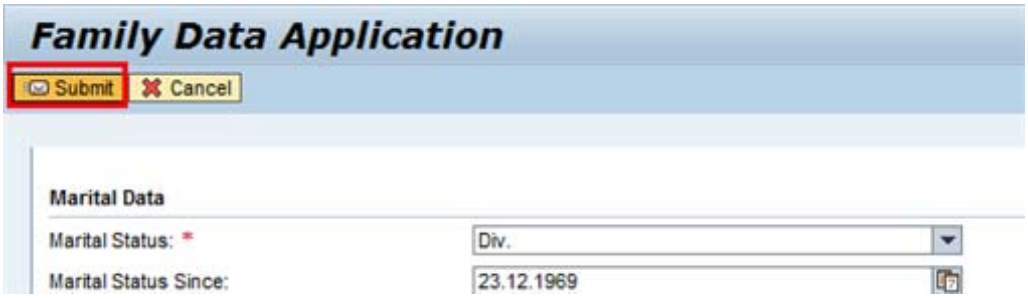
24. Once you have read the Terms and Conditions, click on the Close button to return to the Family Data Application.

Family Data Application



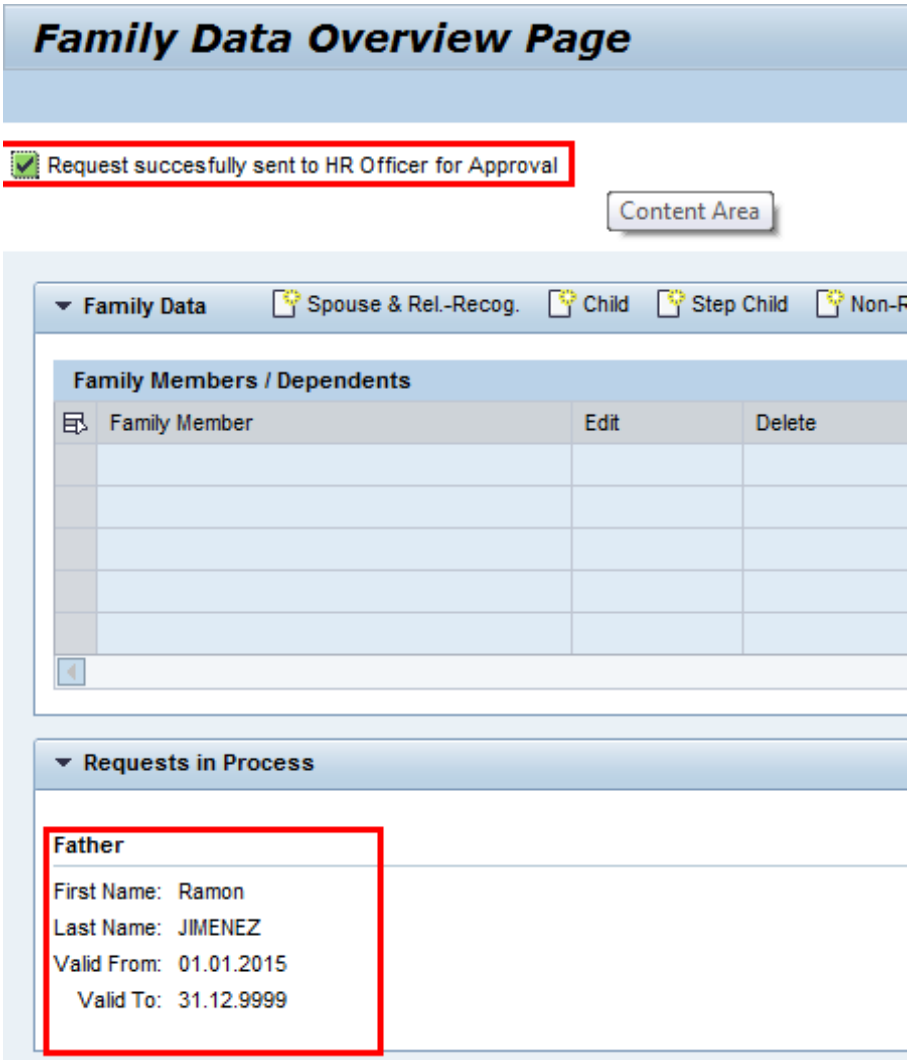
25. Click on the checkbox to acknowledge and accept the Terms & Conditions.

Family Data Application



26. Click on the Submit button.

Family Data Overview Page



27. A message will appear indicating the submission was successful and the submission will appear in the "Requests in Process" until it is approved by the HR Partner. Click on the Employee Self-Service SM tab to return to the Employee Services menu.

Purpose

This procedure is used by the ***Staff Member*** to withdraw or modify the dependant or household member's information.

Reference

Factsheets are provided and contain additional information on the different eligibility and documentation requirements for this subject.

This quick reference guide, the simulation and Factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation

Intended Audience

- ***Staff Member***

Global Process

This process begins after the ***Staff Member*** has logged into the **Umoja** portal.

1. ***Staff member*** locates the request to withdraw.
2. If request has been approved, ***staff member*** submits a request to modify the dependant's information.
3. If request has not been approved, ***staff member*** withdraws the request.

Pre-requisites

None

Objectives

As part of the demonstration, we will show you:

- How to remove a request that has not been processed by the HR Partner.
- How to modify dependant or household member's information that has already been approved by the HR Partner.

Scenario

A ***staff member*** withdraws a request that has not been processed by the ***HR Partner*** and modifies dependant information that has been approved by the ***HR Partner.***

- Demonstration #1 - Withdraw a request that has not been processed by the HR Partner
- Demonstration #2 - Modify a dependant or household member

Menu Path

Withdrawing a household member and dependant can be enter using any one of the following menu paths:

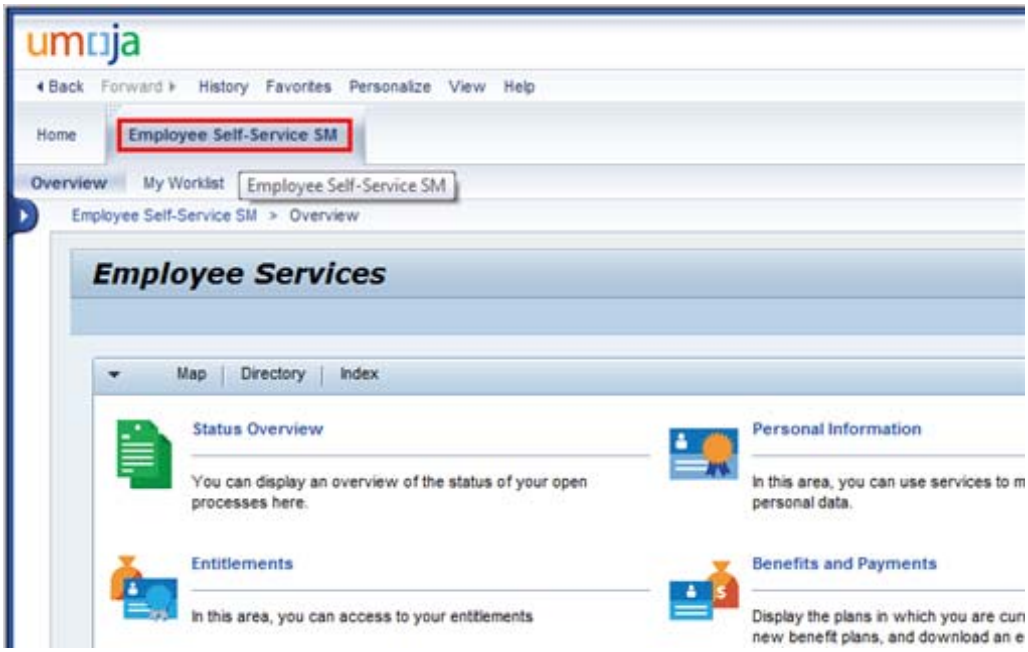
- **Employee Self-Service>Personal Information**
- **Employee Self-Service>Entitlements**
- **Employee Self-Service>Life and Work Events**

For this demonstration, the request will be entered using the **Employee Self-Service>Entitlements** menu path

Procedure

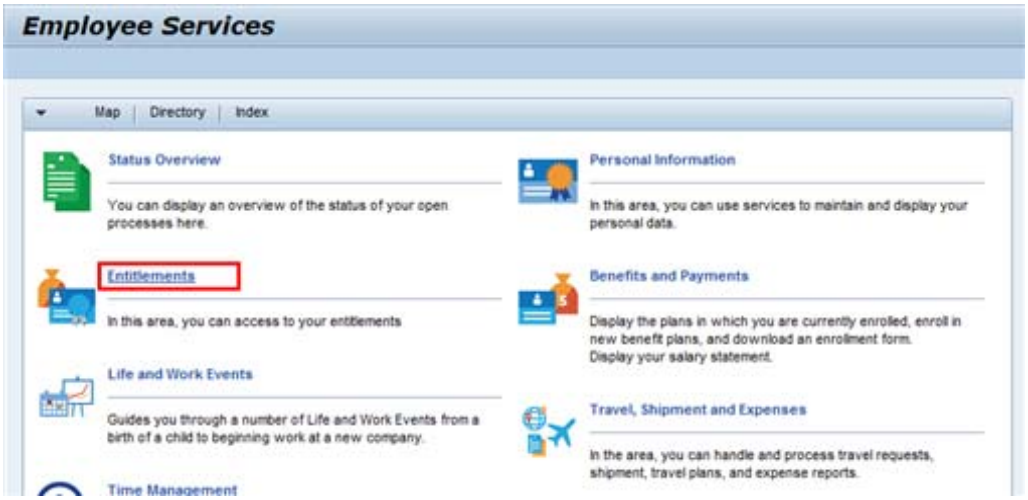
1. Start the transaction using the menu path
Employee Self-Service>Entitlements

Employee Services



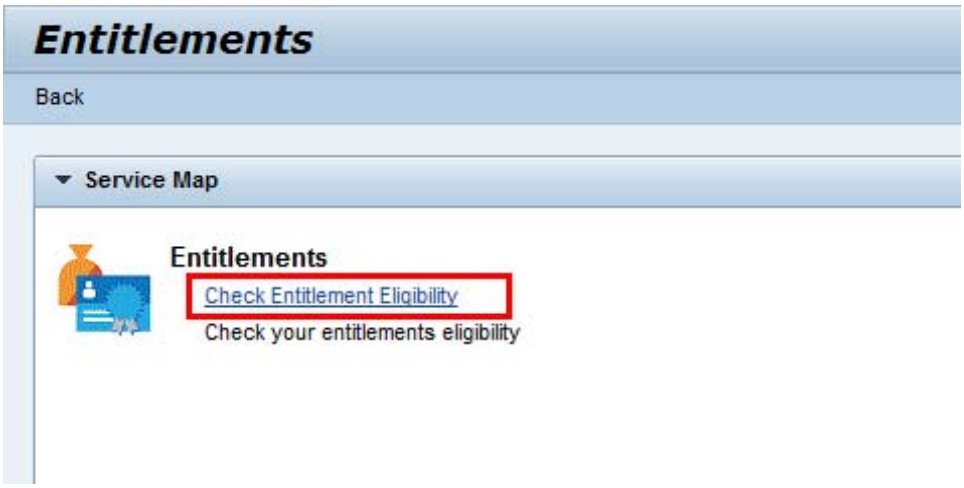
2. Click on the Employee Self-Service SM link

Employee Services



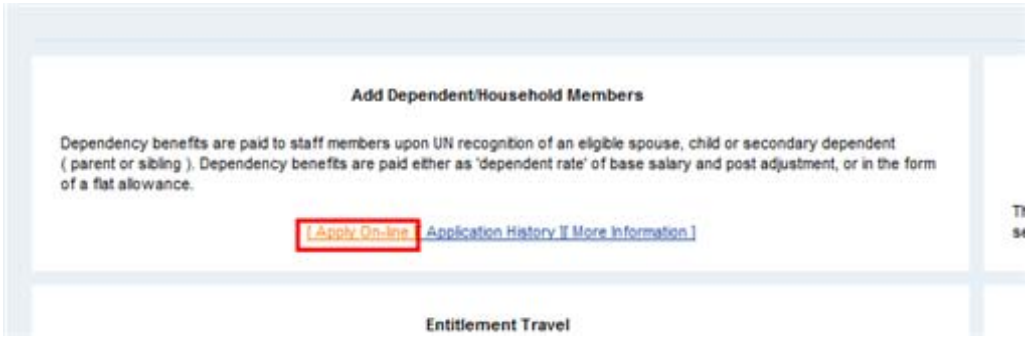
3. Click on the Entitlements link.

Entitlements



4. Click on the Check Entitlement Eligibility link.

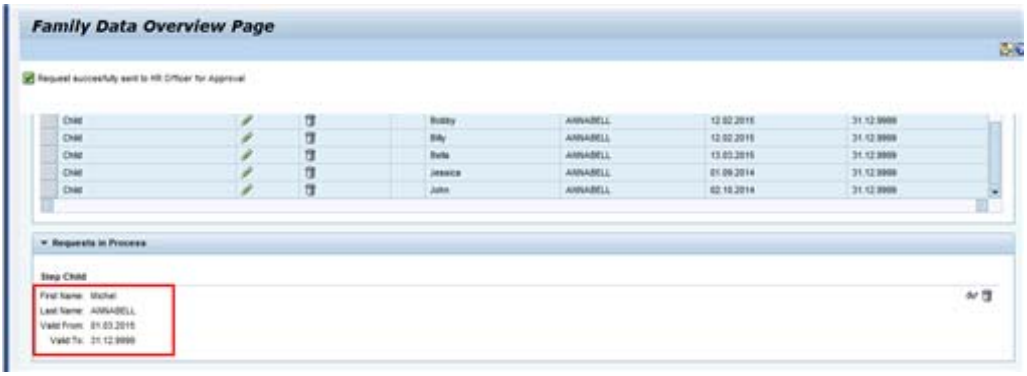
NPO addon: Entitlement Summary Launch Page



5. Click on the Apply On-line link

Demonstration 1 - Withdraw a request that has not been processed by the HR Partner

Entitlements



6. Locate the dependant you want to delete.

Entitlements



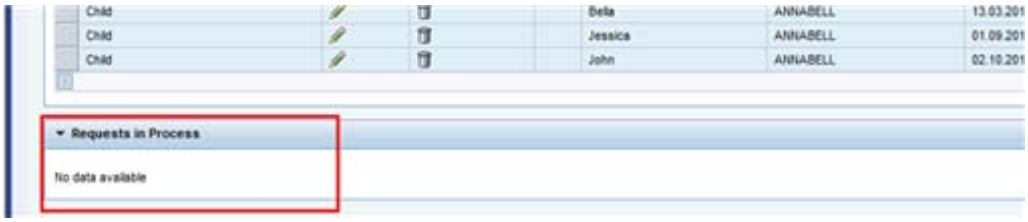
7. Click on the Trash can icon.

Entitlements



8. Click on the Yes button to confirm the deletion.

Entitlements



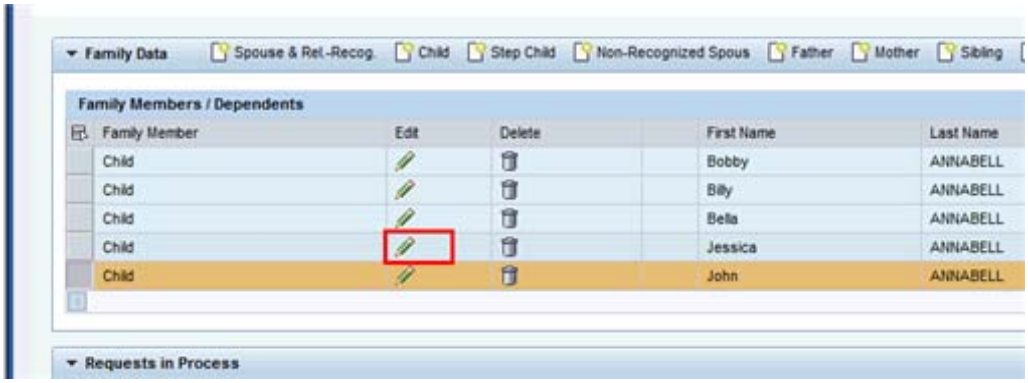
9. The dependant has been removed from the Requests in Process section.

Next, you will modify/withdraw a dependant who has already been approved by the HR Partner. Dependants approved by the HR Partner can only be withdrawn by submitting another request.

In this case you will be modifying a dependants' record with instructions to the HR Partner that the person is to be withdrawn as a dependant.

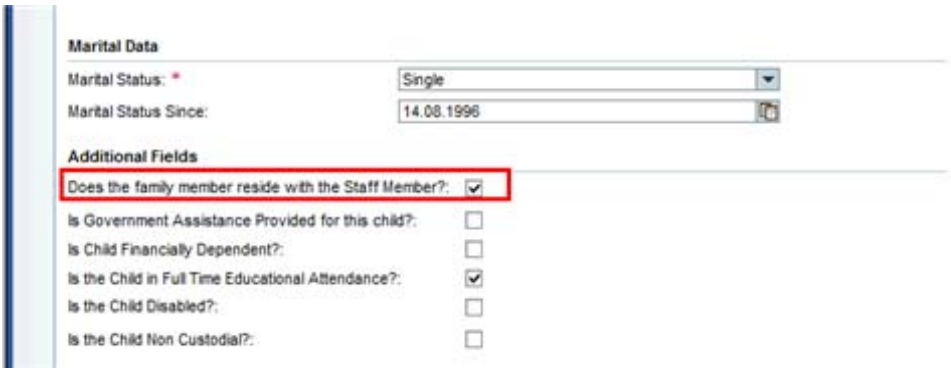
Demonstration 2 - Modify a dependant or household member

Entitlements



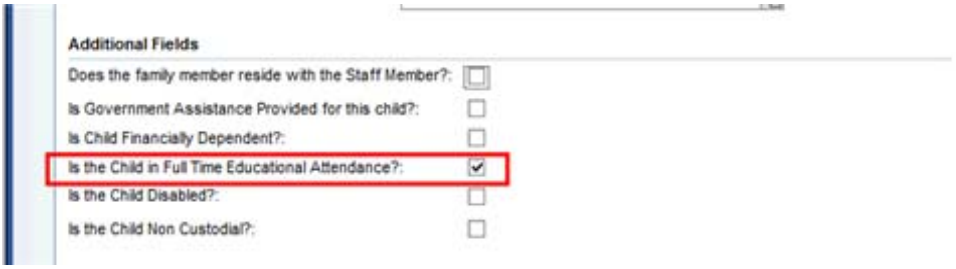
10. Locate the dependant and click on the Edit icon.

Entitlements



11. Scroll down and remove the check mark for "Does the family member reside with the Staff Member?".

Entitlements



12. Remove the checkmark for "Is the Child in Full Time Educational Attendance?".

Entitlements



13. Enter instructions for the HR Partner.

Entitlements



14. In this demonstration we will enter "Jessicia is no longer a dependant".

Entitlements



15. Place a checkmark in the Terms & conditions checkbox.

Entitlements



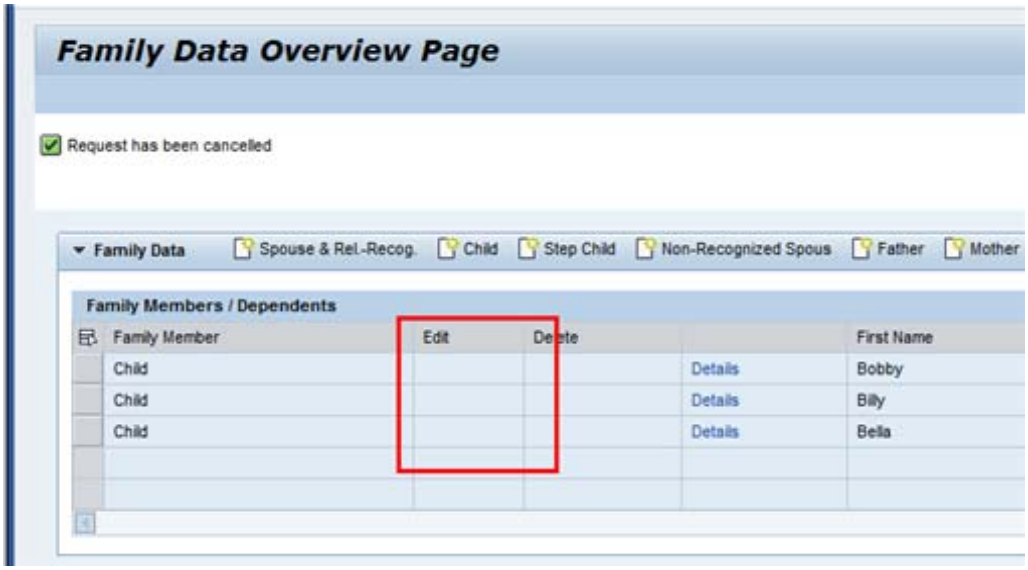
16. Click on the Submit button.

Entitlements



17. Your modification has been sent to the HR Partner for approval..

End of simulation.



18. While pending approval by the HR Partner, you will not be able to edit the record.

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Overview

This Job Aid documents staff members' self-service creation of an Official Travel request. This also applies to Travel Administrator's creation of Official Travel Requests on behalf of staff members and non-staff members who do not have access to Umoja.

Objectives

This Job Aid will walk the staff members or authorized Travel Administrators through the process of creating an Official Travel request as well as sending the request for approval.

Please note that this Job Aid is a condensed version of the steps needed to perform this activity. A complete end-to-end version of the process can be viewed here:

- For Staff Members creating an Official Travel Request, *http://unsapuperform.umoja.un.org/qm/folder-1.11.10310?mode=EU*

- For Travel Administrators creating an Official Travel Request on behalf, *http://unsapuperform.umoja.un.org/qm/folder-1.11.10396?mode=EU*

Note: The above links will lead you to simulations, interactive "recordings" of the Umoja system used to help facilitate a hands-on learning experience.

Users can access simulations in three different modes:

- **Show me**: Users view a video of an entire transaction being conducted
- **Let's do it together**: Users will be prompted to input data at key points during the transaction (recommended)
- **Try it**: Users can complete an entire transaction on their own, with no additional instructions provided

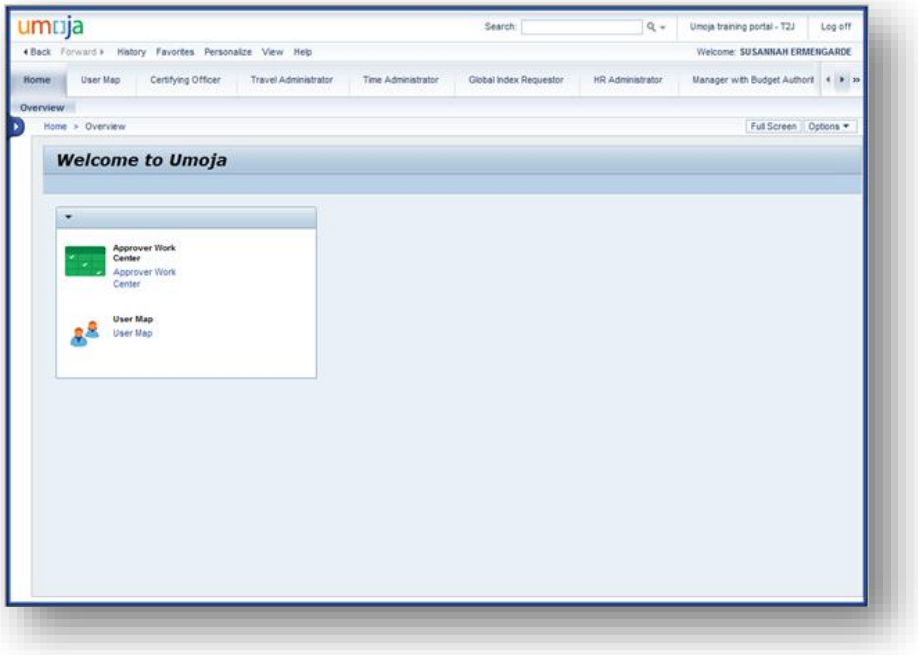
Enterprise Roles

Staff member self-service (available to those staff members with an access to Umoja, otherwise a **Travel Administrator** has the rights to create Travel Requests on staff or non-staff member's behalf).

Please contact your administrative focal point if you are unsure who is performing this role in your Office.

Create Travel Request

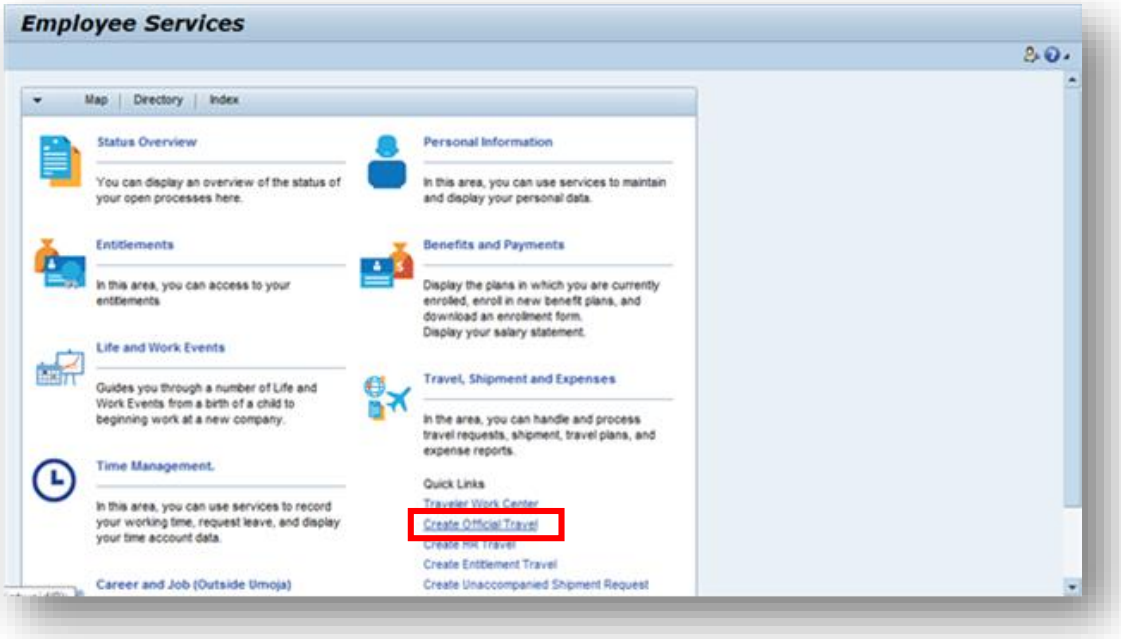
1. Log into Emplyee Self Service Portal.



2. Click the *Employee Self-Service SM* tab at the top of the screen



3. Click *Create Official Travel*

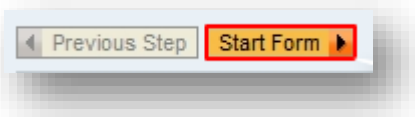


4. Once you enter the Offical Travel Page, you must click the checkboxes that acknowledge reading and understanding of the "Travel Initiation Pre-requisites", and confirm that the supervisor, where applicable, has approved the trip and that the absence was recorded in **Umoja Time Management**.

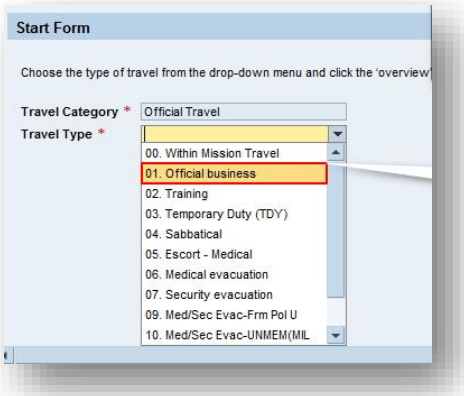
   It is the Traveller's responsibility to ensure that these conditions are met prior to creating the Travel Request.



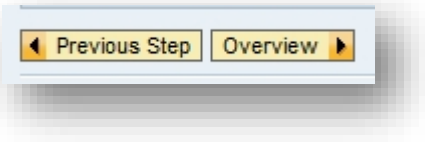
5. Scroll back to the top of the page and click on *Start Form.*



6. Select *Travel Category* and *Travel Type.*



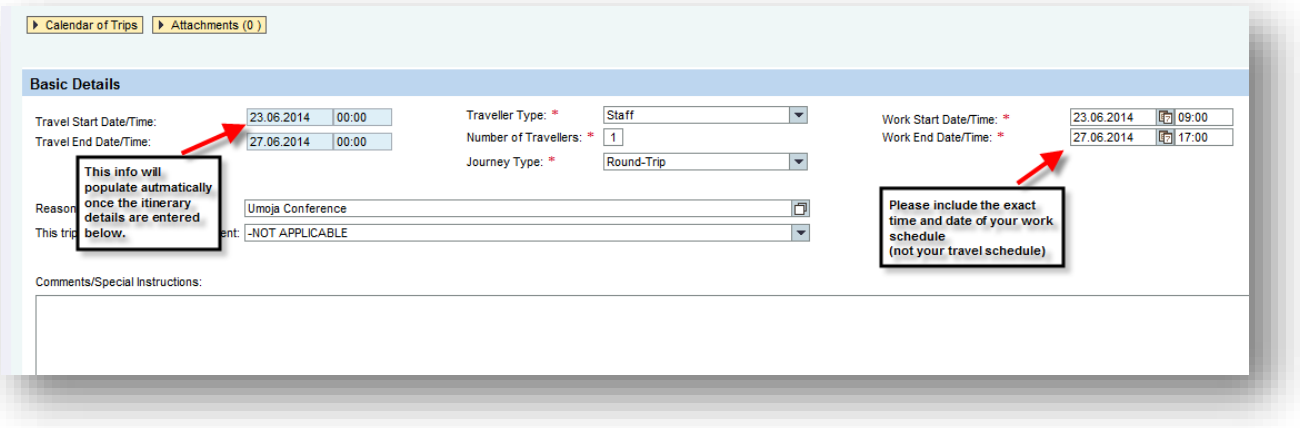
7. Click on *Overview* to go to the next page.



8. Please read the details on this next page to familiarize yourself with travel policies. *Acknowledge* that you have understood the travel policies and click on *General Data* to go to the next page.

Fill in the General Data Page

1. Fill in all the details related to this trip and the official itinerary.

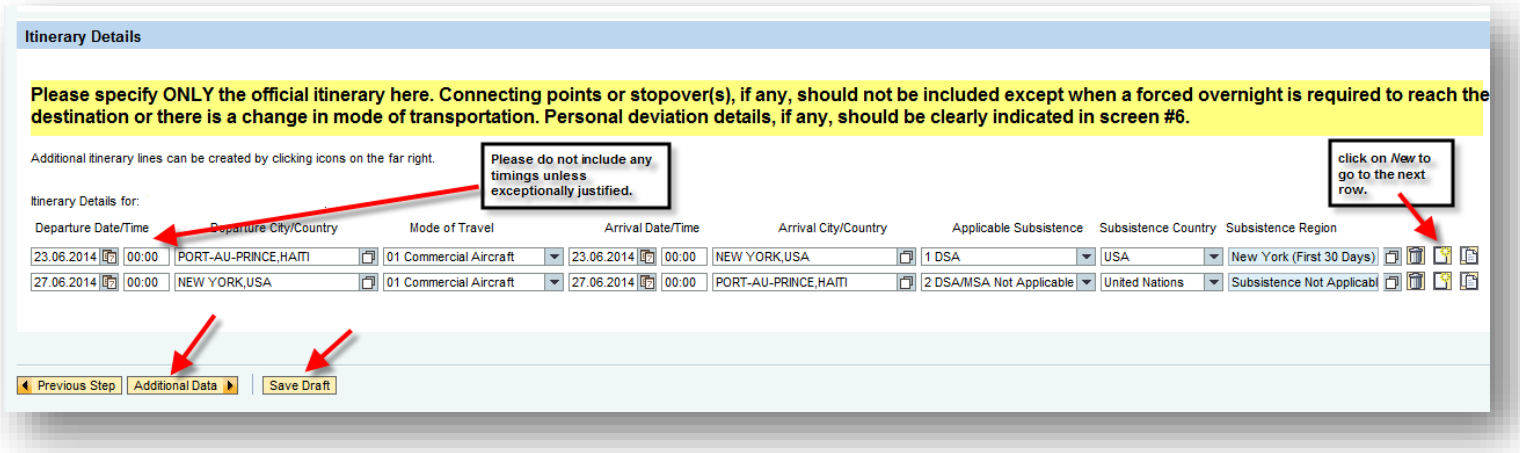


NOTE: If you are combining any other UN Paid Travel, you will have to raise a second Travel Request and crossrefrence it to this Travel Request. To do this, enter the previous Travel Request Number (displayed when a Travel Request is sent for approval) in the **Comments/Special Instructions** field.

2. Below, select *Applicable Subsistence, Subsistence Country* and *Subsistence Region.*

NOTE: as a default, the subsistence allowance will not be calculated for the day of return.

3. After all the *General Data* has been filled in, your screen should look similar to this:



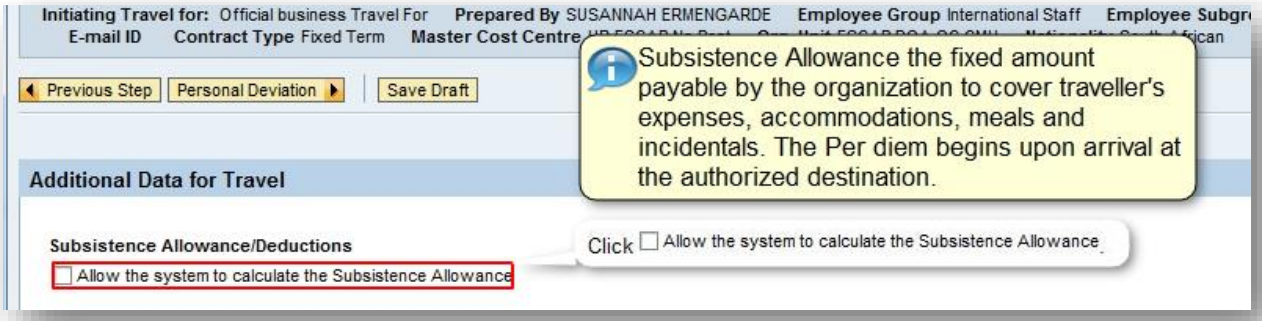
To save time, the **Departure and Arrival City/Country** will auto-complete based on text that you type in these fields, which may eliminate the need to search for a specific value.

4. *Save Draft* and go to *Additional Data*.

NOTE: If you need to add any attachments in *General Data*, you can only do so once you *Save Draft* as the trip needs to be assigned a number by the system.

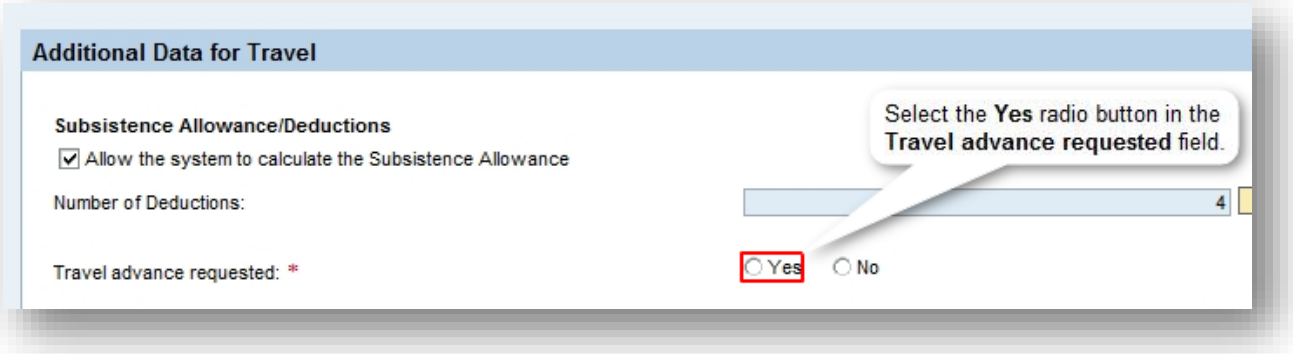
Fill in the Additional Data Page

1. At the top of the screen click on *"I want the system to calculate the Subsistence Allowance"*

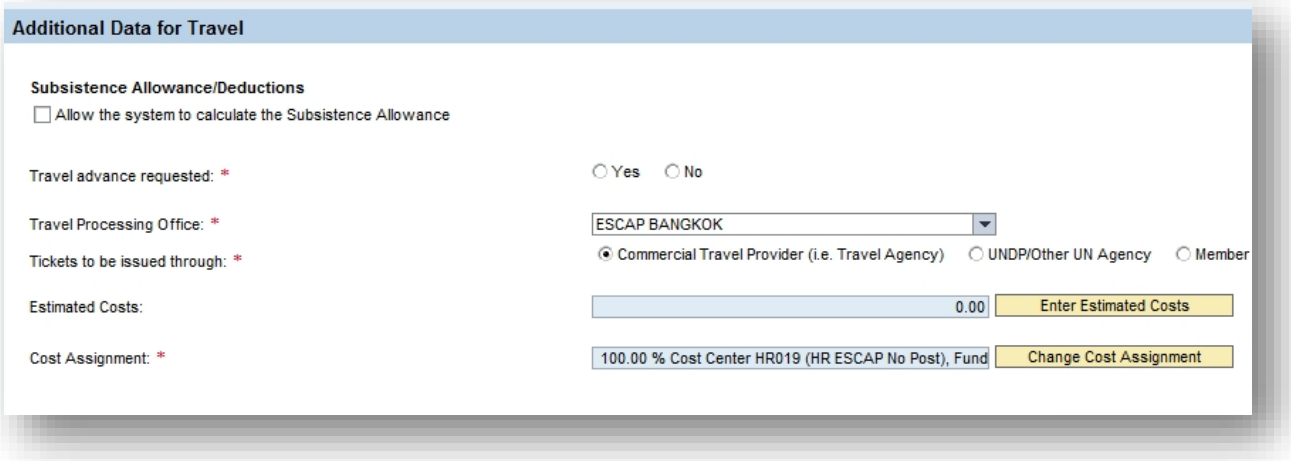


NOTE: This is not applicable if you are a national staff travelling within Home Country (local policy applies) or if you are in receipt of an Ad Hoc DSA.

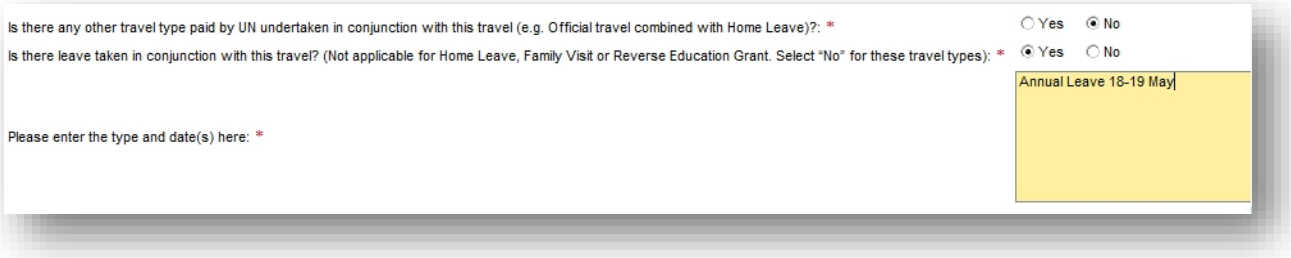
2. Next, click on *Yes* if you require *Travel Advance*. The system will calculate the amount automatically.



3. Answer all other questions listed on this page.



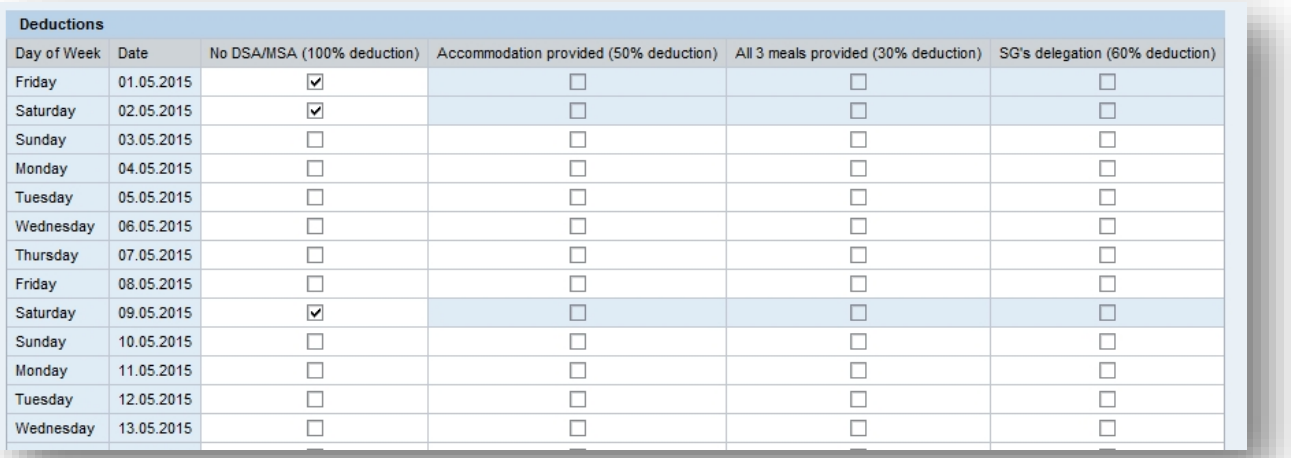
4. If you are taking leave in conjunction with this travel, please indicate the approved leave in the space provided after you answer *Yes* to that question.



5. Click on *Enter Deductions* to select the dates for which you are not entitled to DSA or any portion of it. For example, you would chose this if during your official trip accommodation or all three meals are provided by the organizers.



NOTE: As a default, the system will **not** calculate DSA entitlement for the last travel date; therefore there is no need to indicate it here.

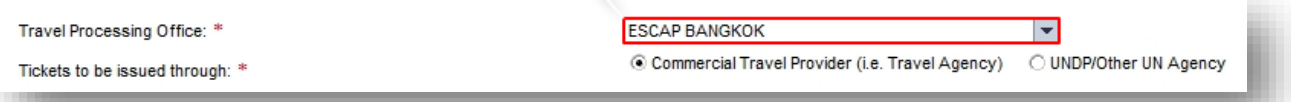


6. Click *Accept* to verify the selected deductions.

7. You will return back to the *Additional Data* Screen.

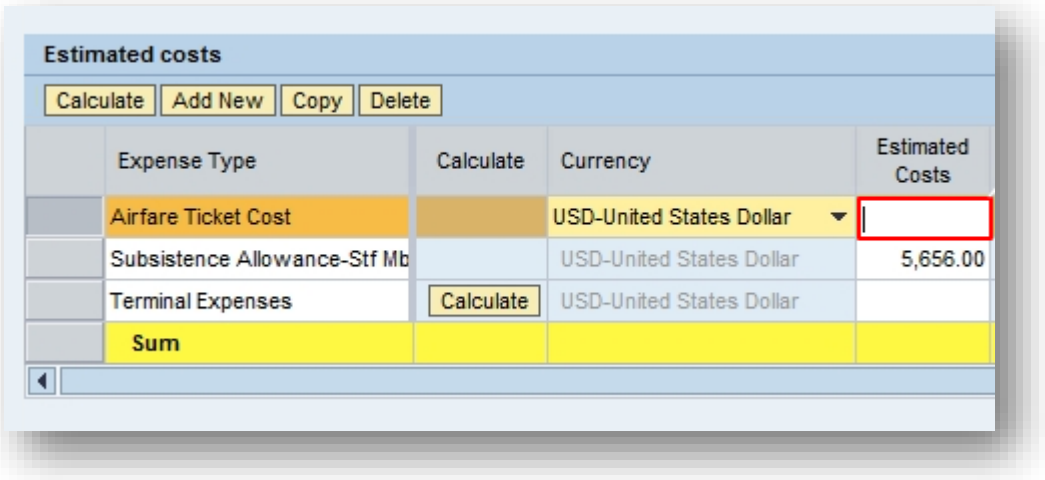
8. The *Travel Processing Office* is displayed as one applicable to your Duty Station by default.

9. Select the appropriate choice for *Tickets to be issued through.*

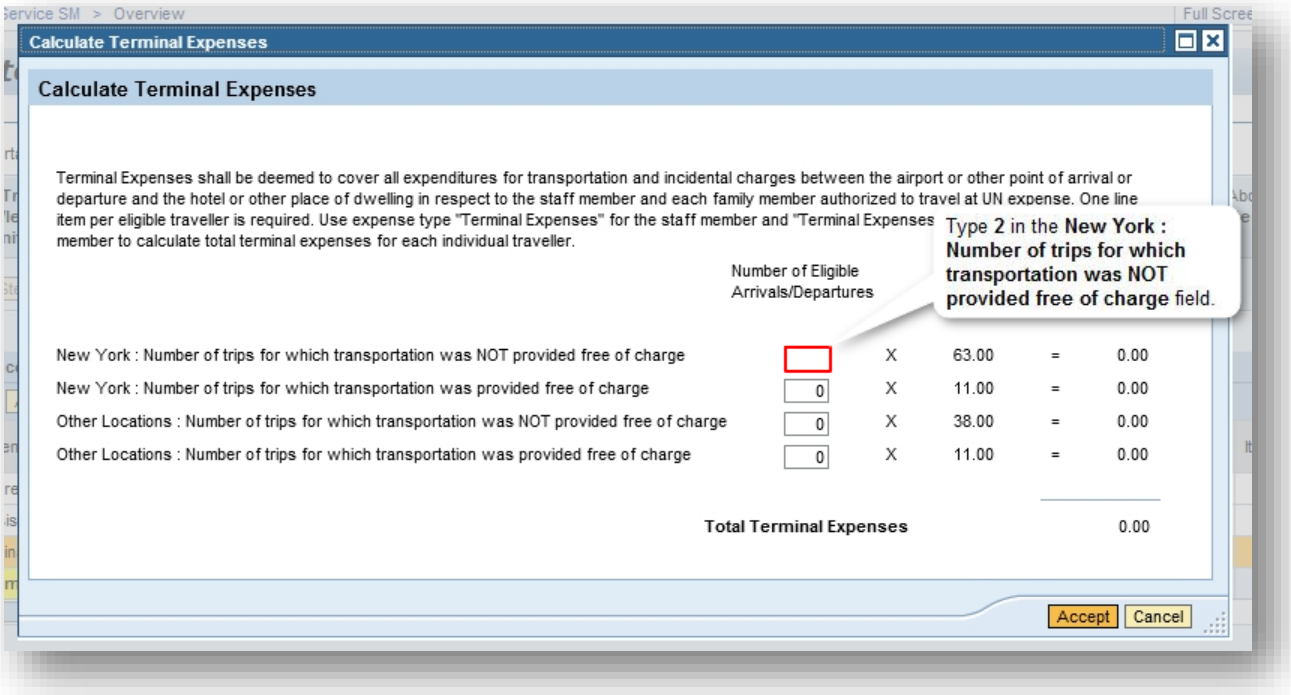


10. Click on *Enter Estimated Costs*. A new screen will appear.

11. In the *Estimated Costs* column, enter your estimated ticket cost (obtained from a Travel Agent or online search). Make sure the correct currency is selected in the *Currency* column.

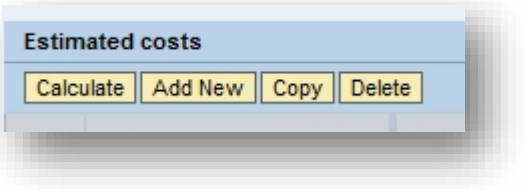


12. Click on the *Calculate* button next to *Terminal Expenses*. This will open a pop-up window where you can enter if the transportation be provided in New York or your duty station, to/from the airport, enter the number of trips, etc..

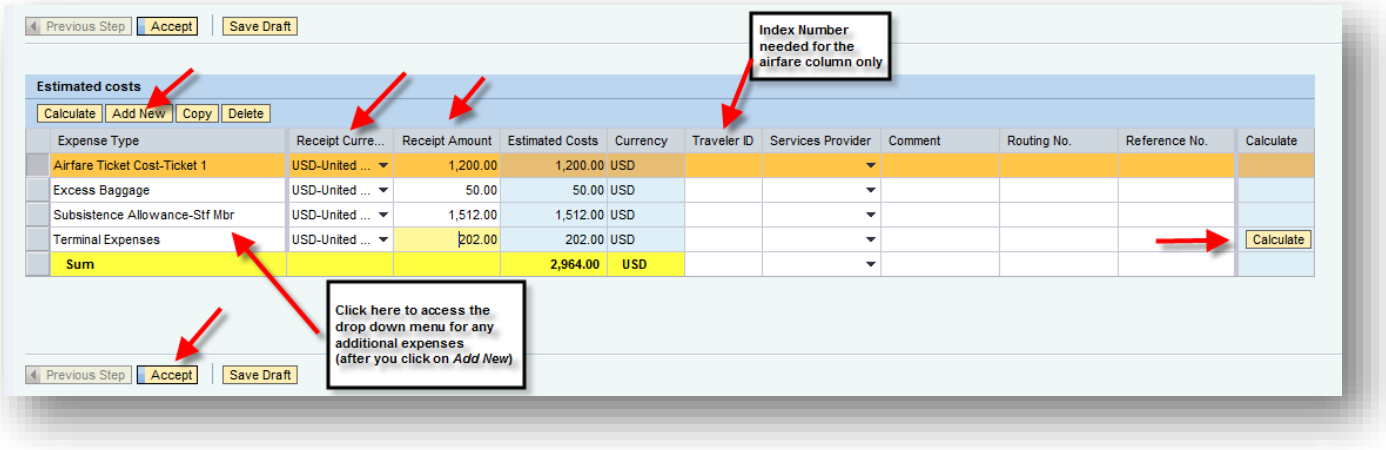


13. Click on Accept, to return to the Enter Estimated Costs page.

14. If you have any other travel related expenses, such as excess baggage, click on *Add New* to enter.



15. Click on *Save Draft,* then *Accept.* (the screen should be similar to the screenshot below)

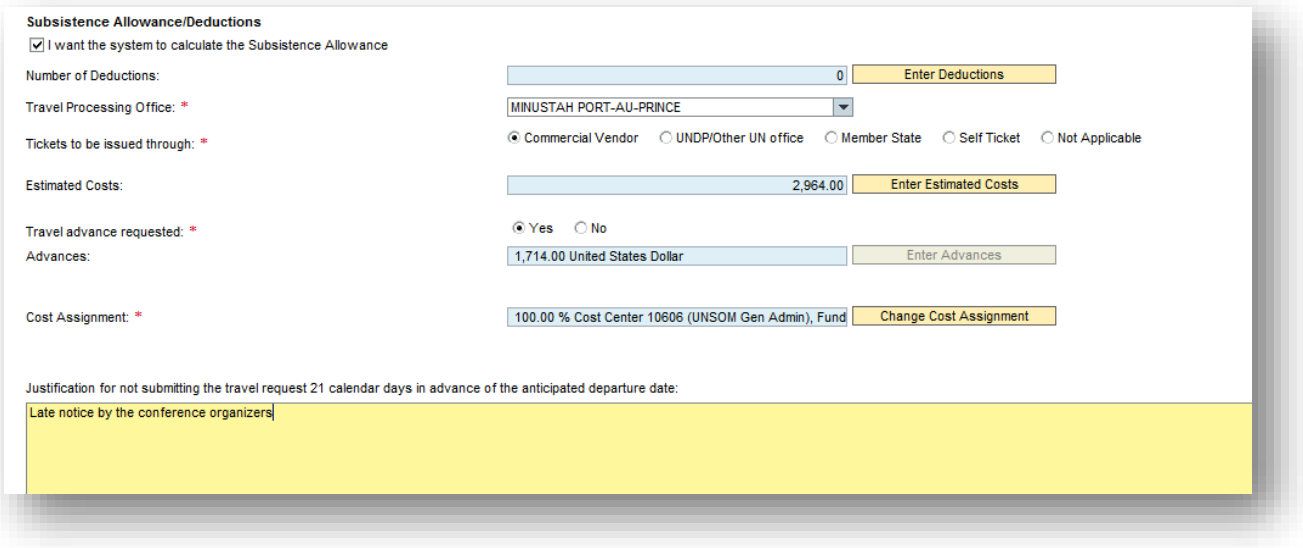


16. You will return to the *Additional Data* Screen.

17. The system will default the cost assignment applicable for your trip. If, however, the trip should be charged to another cost center or split across multiple cost centers, please click on *Change Cost Assignment* and update accordingly.

18. Enter *Travel Justification* if the request was not submitted 21 days in advance. (The system will prompt you to do this, you will not be able to move on unless you enter the reason for late submission)

19. The bottom portion of your *Additional Data Screen* should now look similar to this:



20. Click on *Save Draft* and go to *Personal Deviation*.

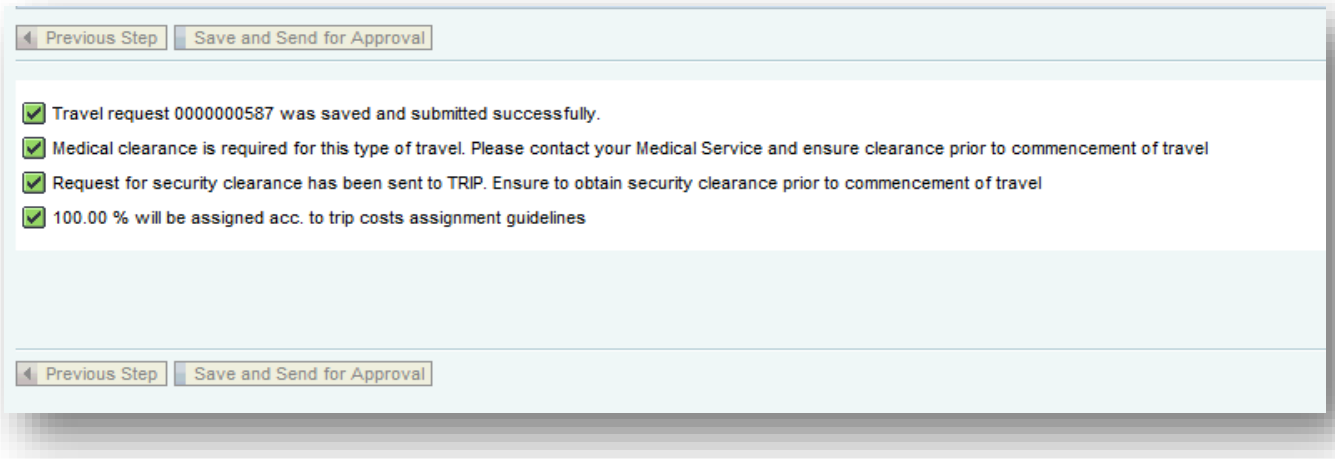
Complete the Request and Send for Approval

1. On *Personal Deviation* page, click *Yes* if, for example, you are taking any annual leave in conjunction with this travel or if you are deviating from your official route for personal reasons and convenience.
   Otherwise click *No* and click on *Review and Send.*

2. On the final page you have a chance to review all your data, make sure it is correct or go back and change if needed.
   Click on *Save and Send for Approval* if you want to submit the request now. If not, then *Save Draft* and you can get back to it later.



3. The final screen should look similar to the screenshot below. If there is any error message, it will appear on this screen. Please follow the instructions on the screen in regards to medical and security requirements as prompted by the system.



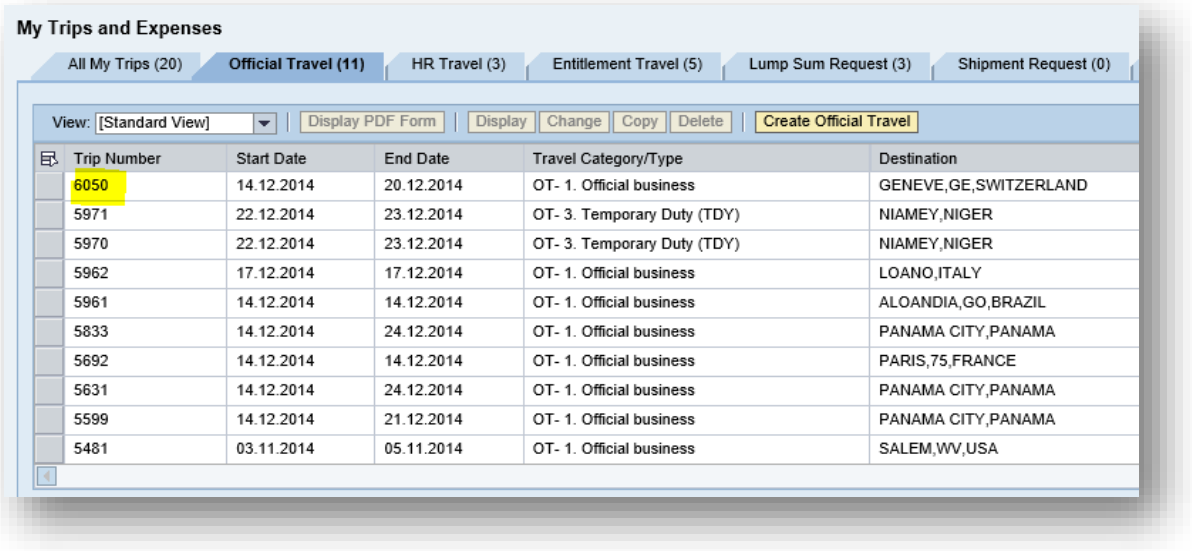
Note: The system automatically triggers a request for security clearance, but in "draft" status **only**. The Traveller is still required to log into the DSS website/TRIP **(trip.dss.un.org)** and finalize the submission of the request. The Traveller is responsible for obtaining his/her security clearance.

General overview on the subsequent approval process

The Official Travel Request, once submitted for approval, will go to a **Travel and Shipment Approver** (formerly Certifying Officer) and to a **Travel Processing Officer** (formerly Travel Unit) for approval and ticketing.

Amending or Deleting an Official Travel Request

You can change or cancel a travel request or **view its status** on the Employee Self Service (ESS) front Screen under *Traveller Work Center*.



Trip Number	Start Date	End Date	Travel Category/Type	Destination
6050	14.12.2014	20.12.2014	OT- 1. Official business	GENEVE,GE,SWITZERLAND
5971	22.12.2014	23.12.2014	OT- 3. Temporary Duty (TDY)	NIAMEY,NIGER
5970	22.12.2014	23.12.2014	OT- 3. Temporary Duty (TDY)	NIAMEY,NIGER
5962	17.12.2014	17.12.2014	OT- 1. Official business	LOANO,ITALY
5961	14.12.2014	14.12.2014	OT- 1. Official business	ALOANDIA,GO,BRAZIL
5833	14.12.2014	24.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5692	14.12.2014	14.12.2014	OT- 1. Official business	PARIS,75,FRANCE
5631	14.12.2014	24.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5599	14.12.2014	21.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5481	03.11.2014	05.11.2014	OT- 1. Official business	SALEM,WV,USA

Find Status of Existing Travel Request

In the Traveller Work Center, scroll to the right to see the current approval status of a particular Travel Request. For example, you can view if a Request is waiting for approval from **Travel and Shipment Approver** or the **Travel Processing Office**.

Deleting an Offical Travel Request

BEFORE THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL

Before the request has been submitted for approval, it can be changed or deleted by following these steps:

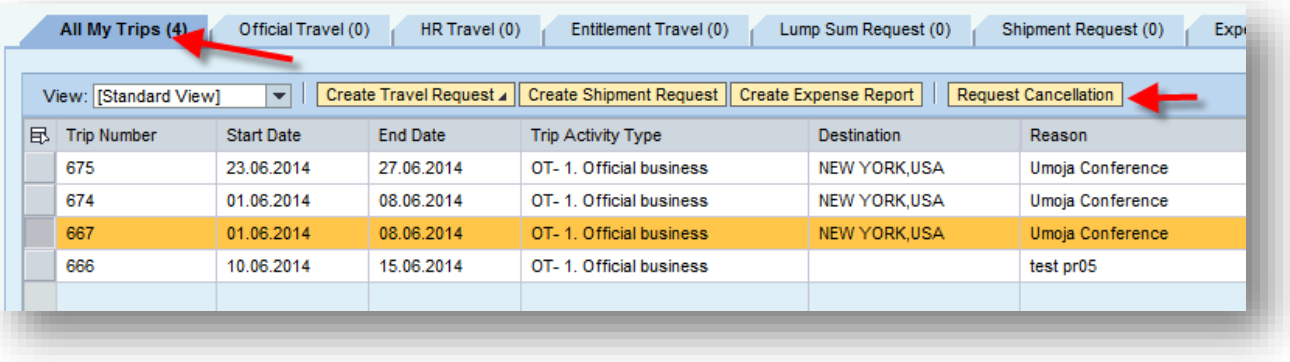
1. Identify your Official Travel Request under the *Official Travel* tab.

2. If deletion is required, click on *Delete* and follow the subsequent steps.

AFTER THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL OR HAS BEEN APPROVED

Once the request has been submitted for approval to a Travel and Shipment Approver, the request can be cancelled by following the steps below:

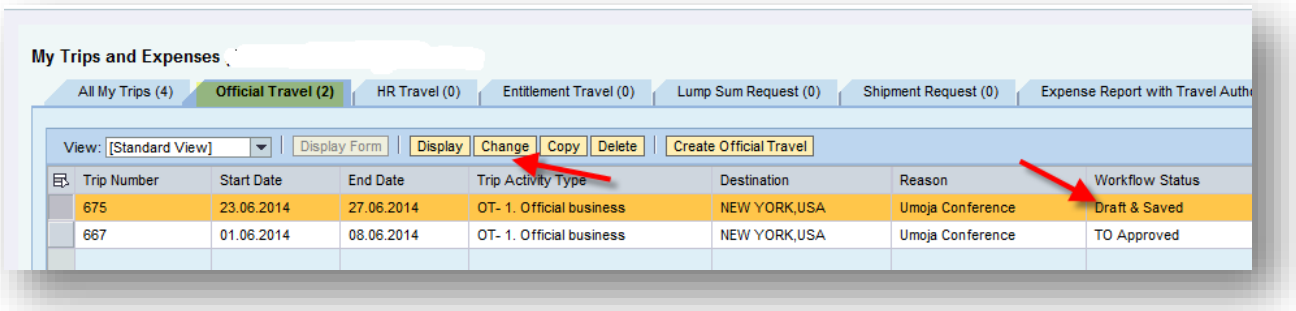
1. Go to Employee Self Service (ESS) – *Traveller Work Center*
2. Find and highlight the Official Travel Request you wish to cancel in All *My Trips* tab.
3. Click on *Request Cancelation*.



Amending an Offical Travel Request

BEFORE THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL

1. Go to Employee Self Service (ESS) – *Traveller Work Center*
2. Under the *Official Travel* tab, find and highlight the request you wish to amend.
3. Click on *Change* to amend the request.



AFTER THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL OR HAS BEEN APPROVED

Once the request has been sent for approval or has been certified and approved, a staff member or a Travel Administrator will have to contact the Certifying Officer (by phone or email, but outside Umoja) to amend the request or return to the staff member to apply any changes.

Purpose

Use this procedure to by the Time Manager (primary and secondary) to approve/endorse leave absence requests submitted by a staff member.

Intended Audience

- ***Time Manager***

The role of the Time Manager is:

- Approve/reject requests from staff members for the following types of leave:
  - Annual Leave
  - Annual Leave - Reverse EGT (Education Grant Travel)
  - Annual Leave - Home Leave
  - Annual Leave - Family Visit
  - CTO Use (Compensatory Time-Off)
  - Compressed Reg Day Off
  - Travel Time for R & R (Rest and Recuperation)
  - Uncertified Sick Leave
  - Paternity Leave
- Endorse staff member's request for:
  - Special Leave
  - Rest and Recuperation
- View absence balances for staff members.
- View Team Calendar to see approved leave for the team

References

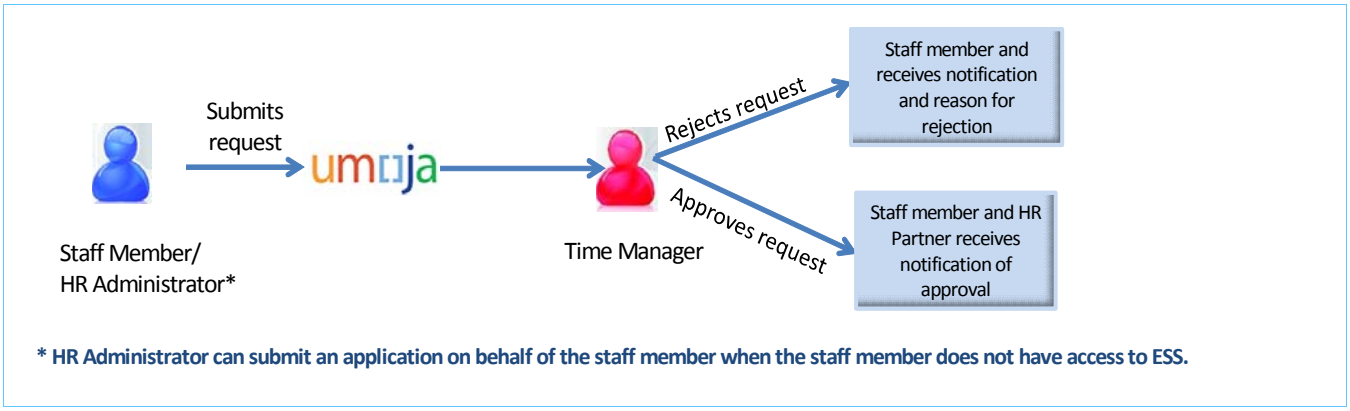
Factsheets are provided and contain additional information on the different eligibility and documentation requirements for this subject.

This quick reference, the training simulations and Factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation.

Global Process

This process begins after the ***staff member*** has logged into the **Umoja Employee Self-Service** application.

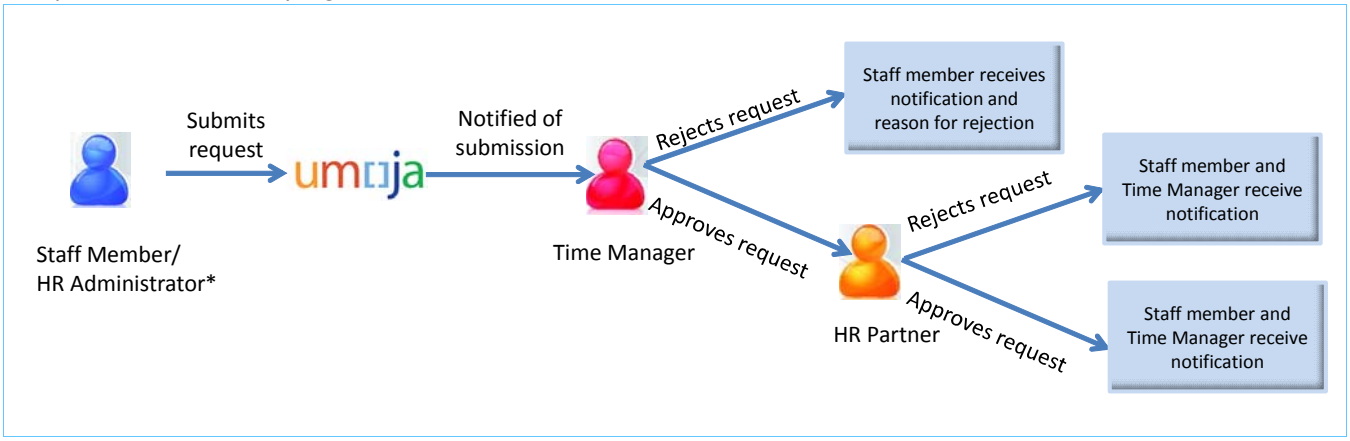
Approval Process



1. ***Staff member*** has submitted a request for leave through the Umoja Employee Self-Service portal.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** approves the request, the request is recorded in Umoja and a notification is sent to the ***staff member.***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.

Endorsement Process

The Time Manager is the first approver but the request is not considered approved until the HR Partner (second approver) agrees to the request.



1. ***Staff member*** has submitted a request for leave through the Umoja Employee Self-Service portal.
2. ***Time Manager*** verifies and reviews the request through the Umoja Approver Work Centre.
   a. If the ***Time Manager*** approves the request, the request is recorded in Umoja and a notification is sent to the ***staff member.*** The request is then forwarded to the ***HR Partner***
   b. If the ***Time Manager*** rejects the request, the ***staff member*** is notified. The ***staff member*** will need to create and submit a new request.
3. ***HR PArtner*** reviews the request through the Umoja Approver Work Centre.
   a. Once approved, the staff member and time adminstrator are notified.

Objectives

As part of the demonstration, we will show you:

1. How to check your team calendar for specific months.
2. How to check the staff member's absence balances.
3. How to approve or reject the request.
4. How to endorse a request that will be sent to the HR Partner for approval.

Scenario

A ***Time Manager*** logs into Umoja and reviews a list of new leave requests that require his/her action.

- Demonstration #1 - the ***Time Manager*** will review and approve a new leave request for a halfday leave on 02 April 2015.
- • Demonstration #2 - the ***Time Manager*** will review and reject a new leave request for 3 days from 15 April 2015 to 17 April 2015.
- • Demonstration #3 - the Time Manager will review and endorse a special leave without pay for 1 year 1 May 2015 through 30 April 2016 so the staff member can pursue their masters degree.

Menu Path

Use the following menu path(s) to begin this process:

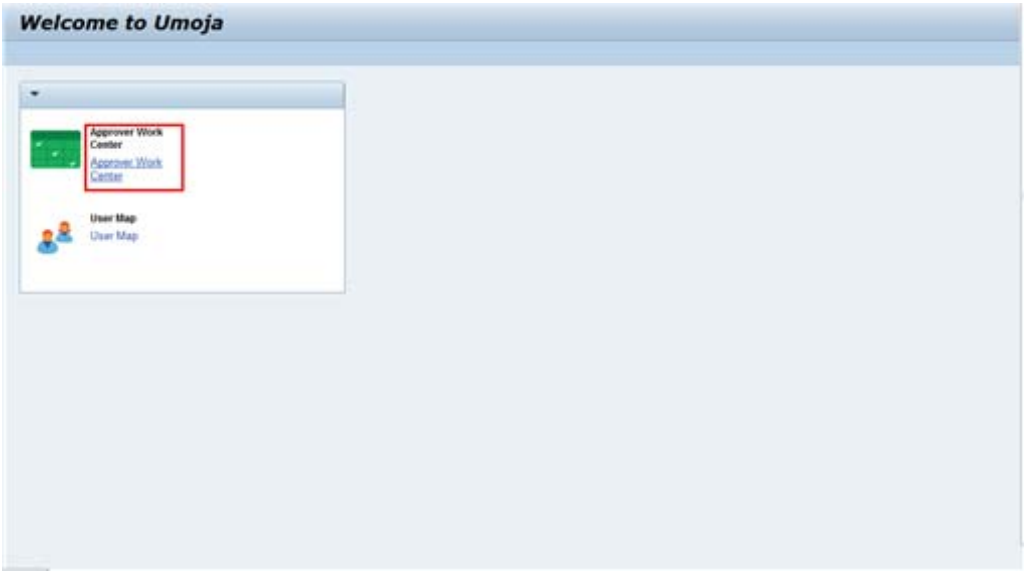
Home>Approver Work Center

Procedure

1. Start the process by using the following menu path:

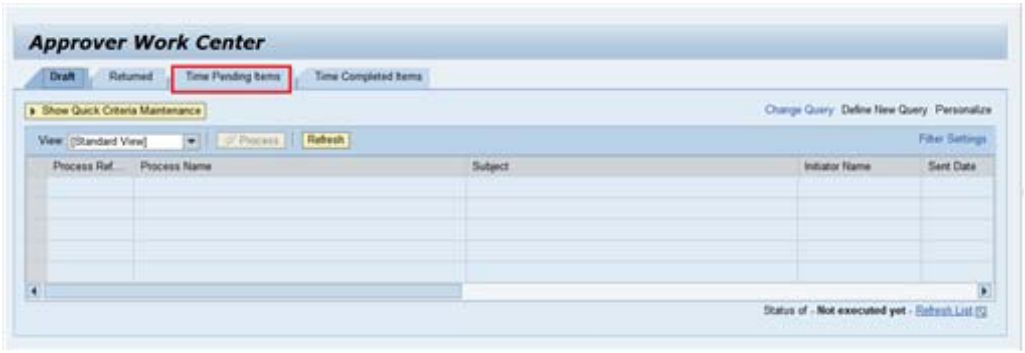
Home>Approver Work Center

Welcome to Umoja



2. From the Home Page, click on the Approver Work Center link.

Approver Work Center



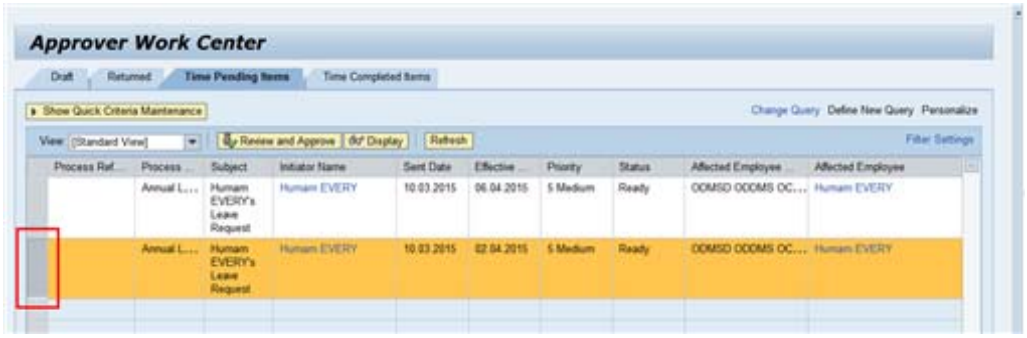
3. In this demonstration we will click on the Time Pending Items tab to review new leave requests.

Depending on your responsibilities you may see multiple tabs. In this demonstration, the manager only has time responsibilities.

- ***Time Pending Items*** - lists the new leave requests that require the time manager's actions. Provides the time manager with the functionality to approve or reject a request.
- ***Time Completed Items*** - list the requests that have been approved or rejected.

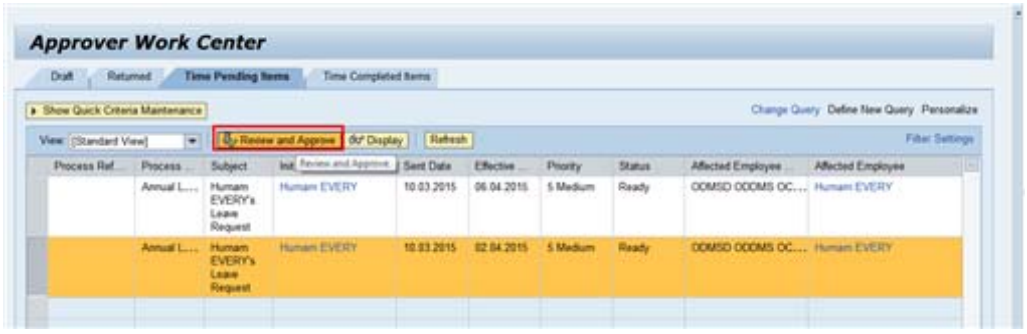
Demonstration #1 - you will review and approve a new leave request

Approver Work Center



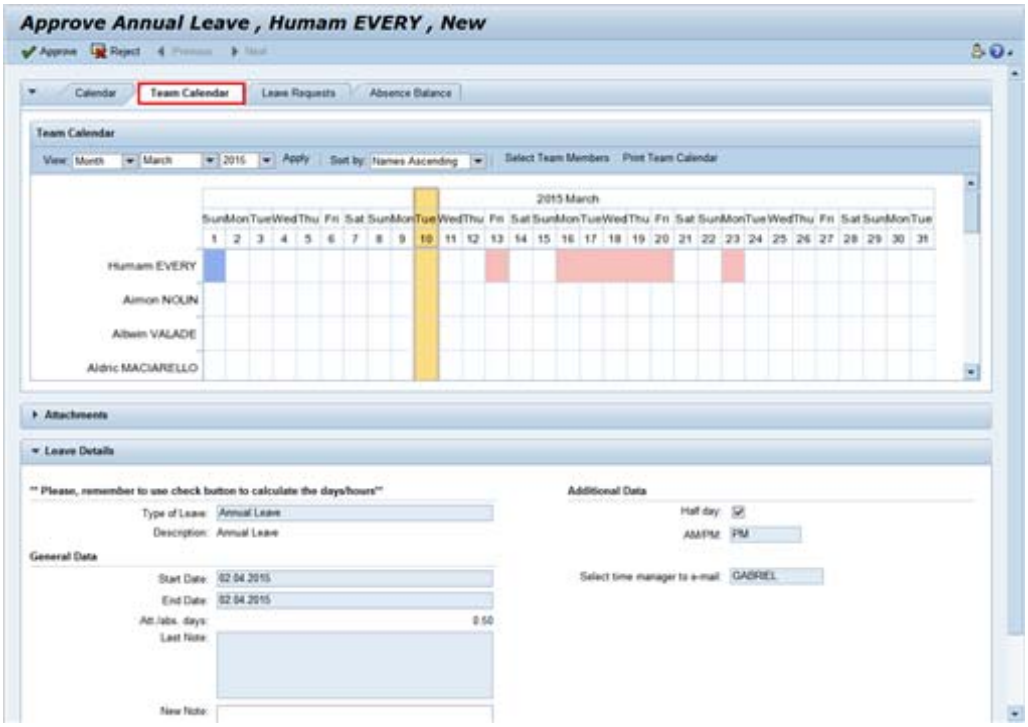
4. Click on the gray box next to the request you want to review.

Approver Work Center



5. Click on the Review and Approve button to review the details of the request.

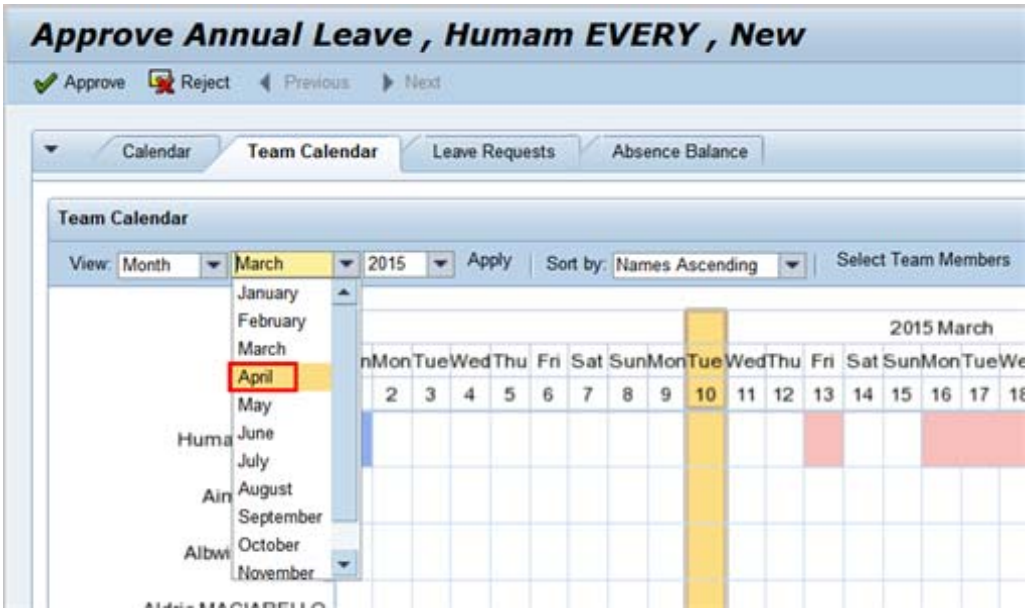
Approve Annual Leave , Humam EVERY , New



6. Click on the Team Calendar tab. The team calendar will display the approved leave for the team for the current month.

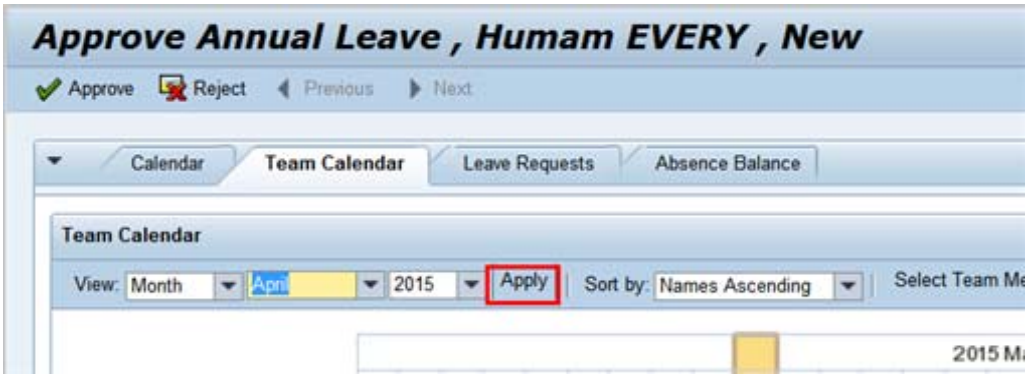
The leave details for the selected staff member will appear in the Leave Details section.

Approve Annual Leave , Humam EVERY , New



7. You may select the month of the request from the pull-down menu of the calendar to check the teams' leave plans. In our demonstration we will select April from the list.

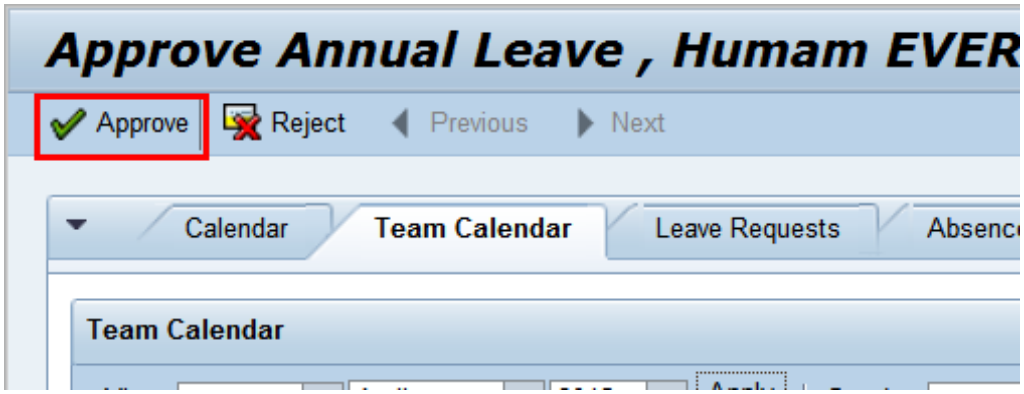
Approve Annual Leave , Humam EVERY , New



8. Click on the Apply button to display the selected month.

Proceed to review the leave plans for the team and the staff member's request in the Leave Details section.

Approve Annual Leave , Humam EVERY , New



9. In our demonstration we will approve the request by clicking on the Approve button.

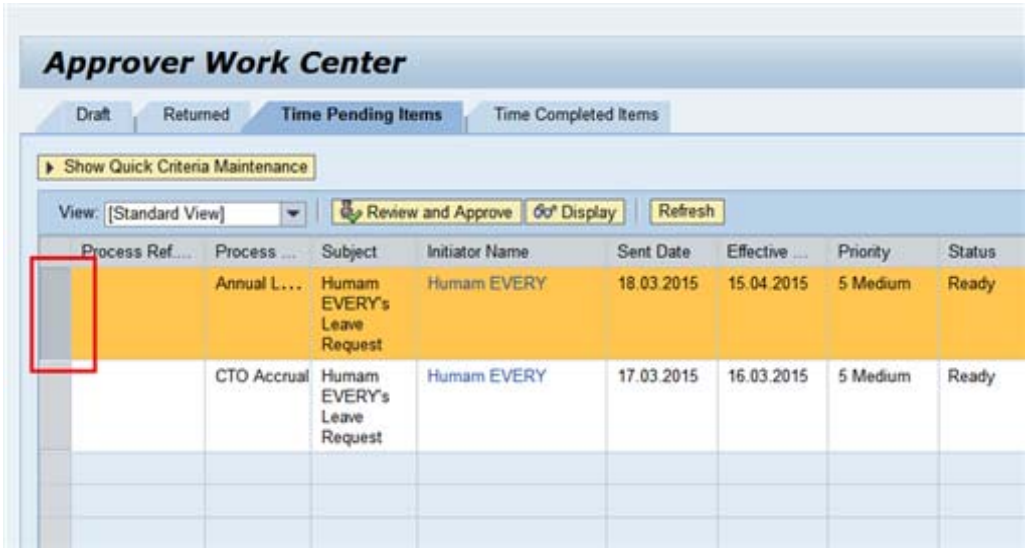
Approve Annual Leave , Humam EVERY , New



10. A message will appear indicating that the approvalwas successful and the request will be moved to the Time Completed Items list. The staff member will receive a notification of the decision.

Demonstration #2 - you will review and reject a new leave request

Approver Work Center



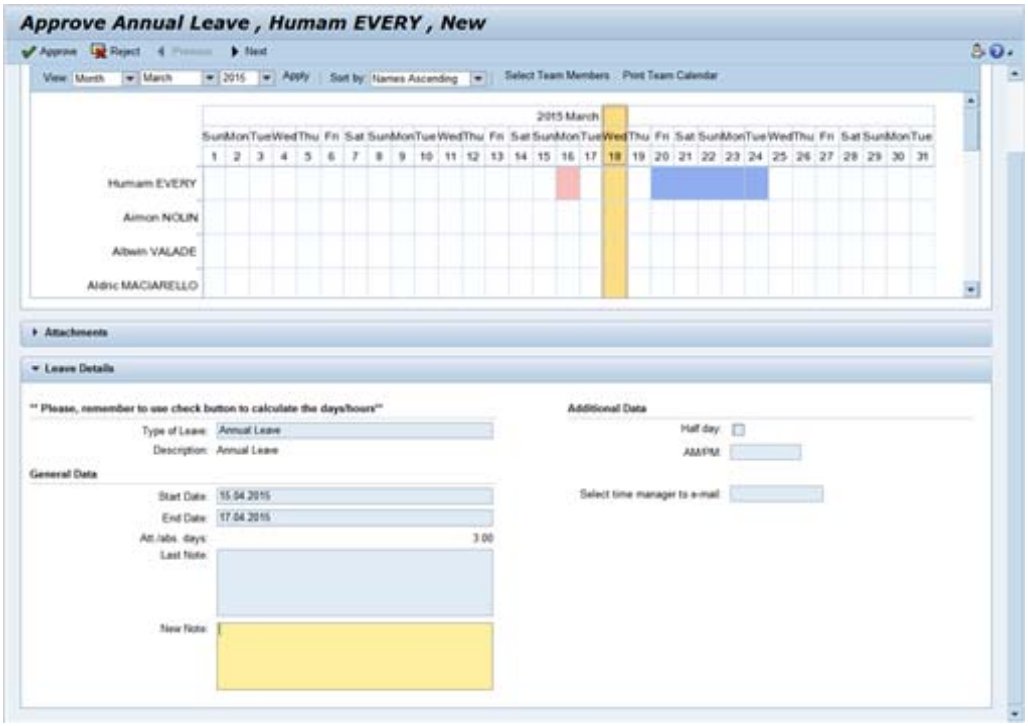
11. Click on the gray box to select the next request you want to review.

Approver Work Center



12. Click on the Review and Approve button.

Approve Annual Leave , Humam EVERY , New

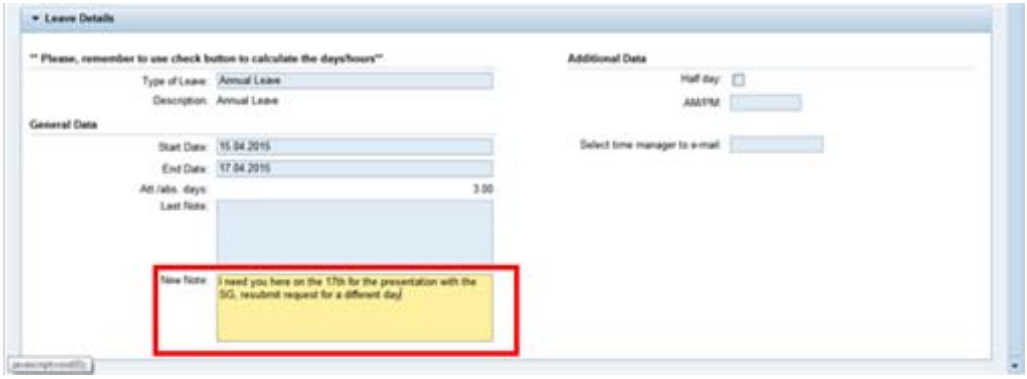


13. Review the information provided as in the previous demonstration.

In this demonstration, the staff member is requesting leave from 15 April 2015 to 17 April 2015 and you decided that you can not approve this absence request.

If you plan to reject the request, you must enter a reason.

Approve Annual Leave, Humam EVERY, New



14. Enter the reason for the rejection in the New Note field. In this demonstration we entered "I need you on the 17th for the presentation with the SG, resubmit request for a different day."

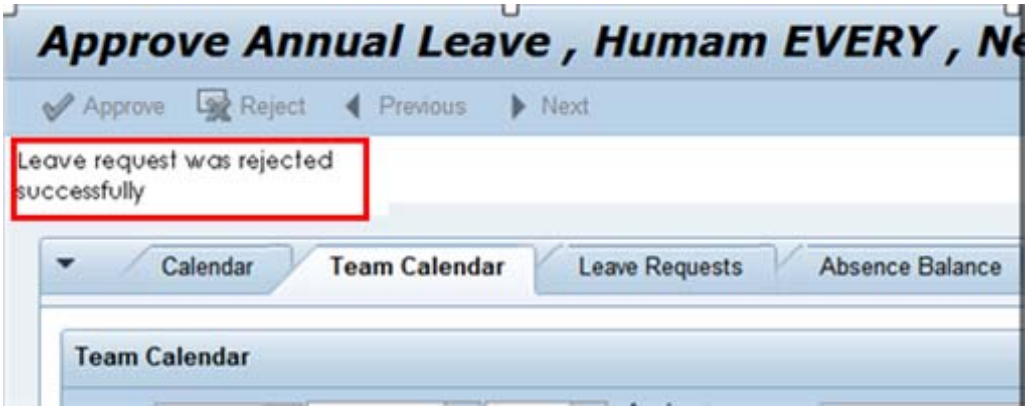
Approve Annual Leave , Humam EVERY , New



15. In our demonstration we will reject the request by clicking on the 

button. .

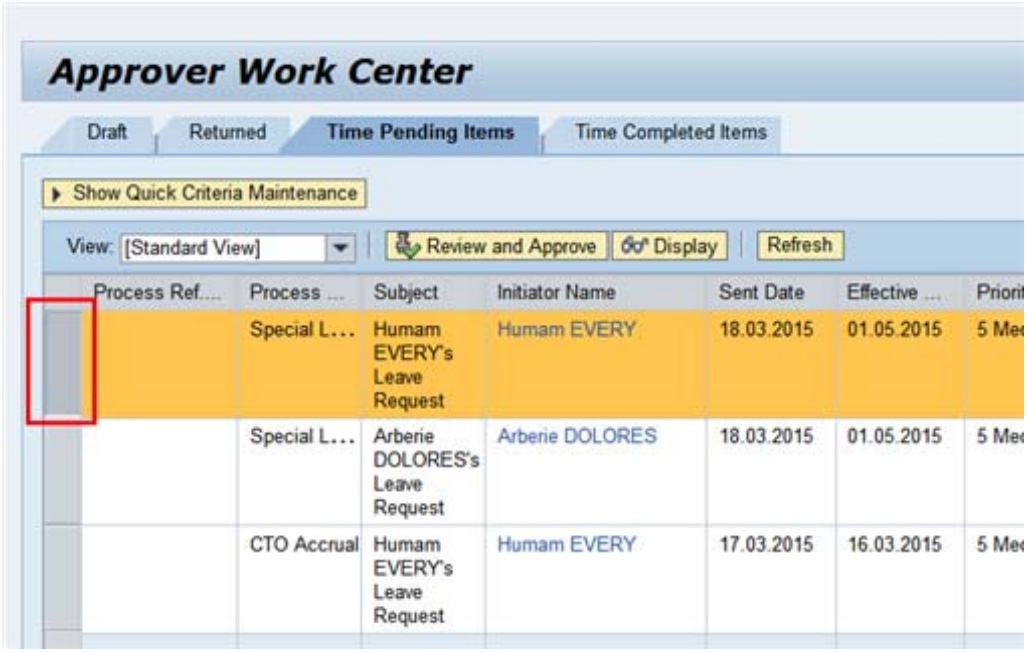
Approve Annual Leave, Humam EVERY , New



16. A message will appear indicating that the rejection was successful and the request will be moved to the Time Completed Items list. The staff member will receive a notification of the decision.

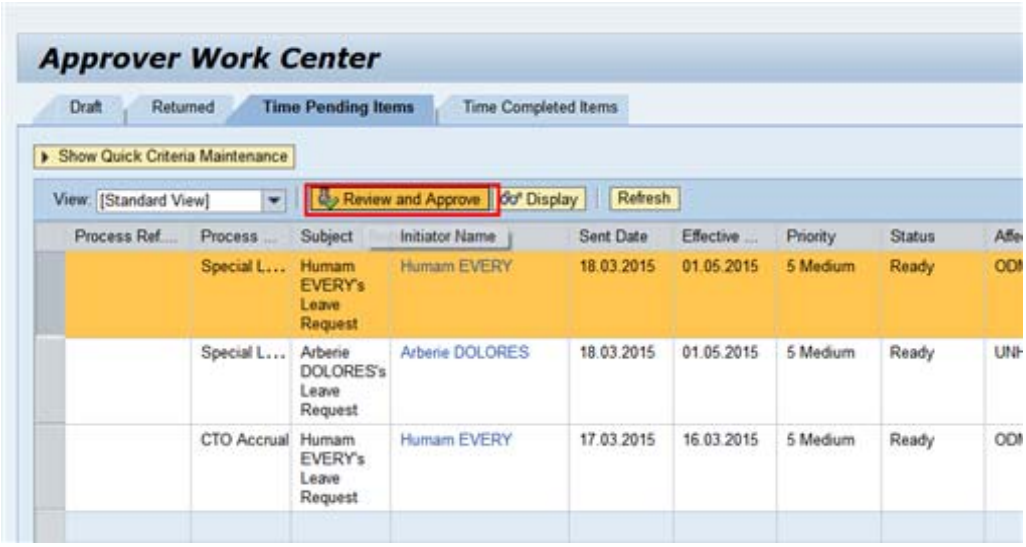
Demonstration #3 - you will review and endorse a special leave request

Approver Work Center



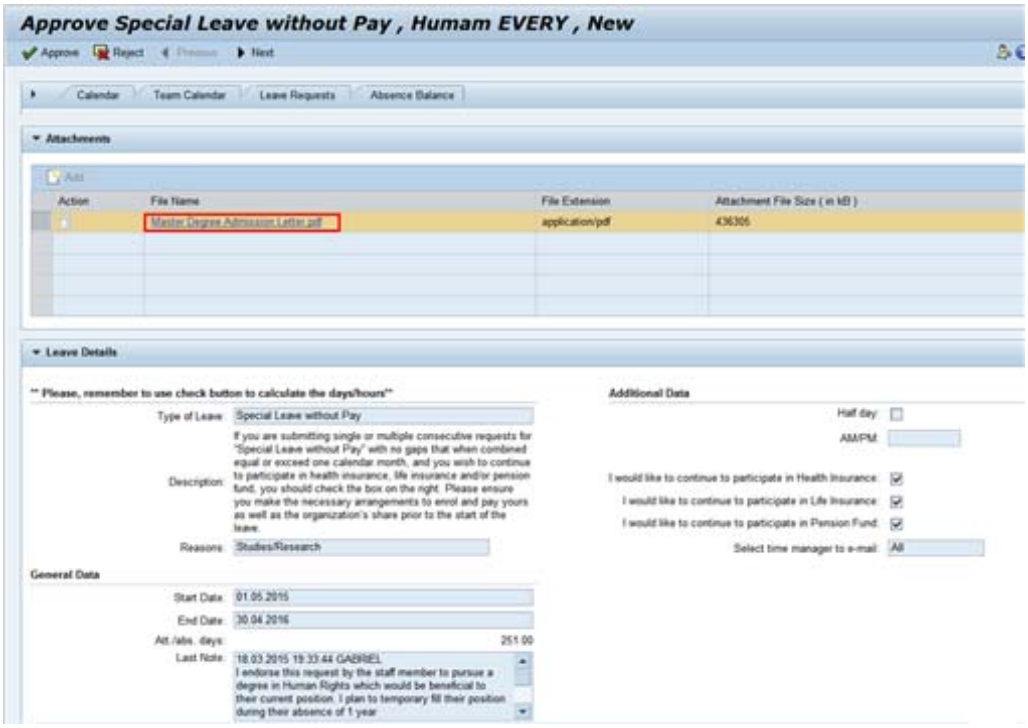
17. Click on the gray box to select the next request you want to review.

Approver Work Center



18. Click on the Review and Approve button.

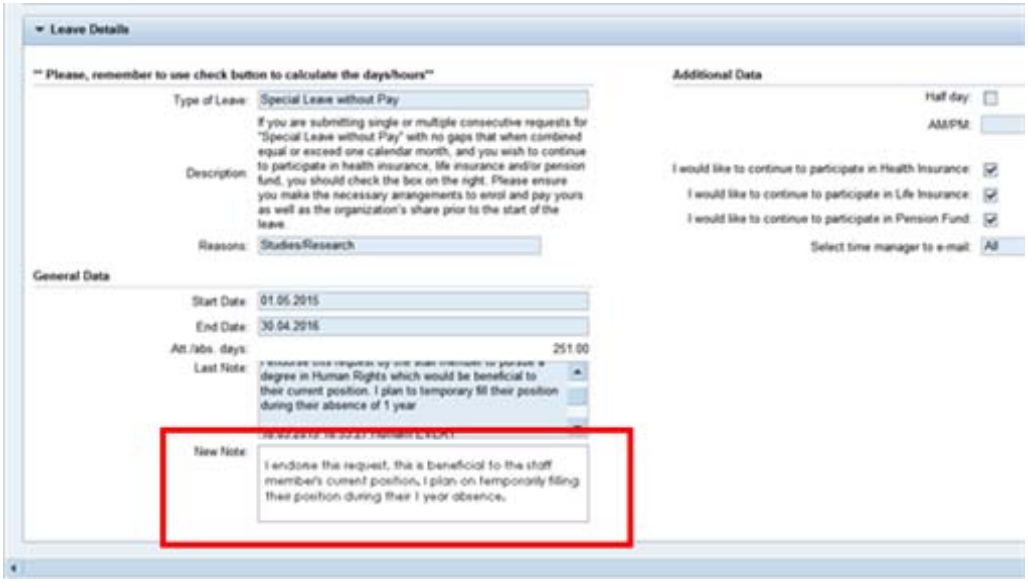
Approve Special Leave without Pay , Humam EVERY , New



19. This is a special leave without pay (SLWOP) request for 1 year so that the staff member can pursue higher education studies. SLWOP request require submission of documentations. In this case, the documentation would be the admission papers.

Click on the attachment link and review the document.

Approve Special Leave without Pay, Humam EVERY, New



20. In this demonstration, we will type the following "I endorse this request, this is beneficial to the staff member's current position. I plan on temporarily filling their position during their 1 year absence."

Approve Special Leave without Pay , Humam EVERY , New



21. Click on the Approve .button.

Approve Special Leave without Pay , Humam EVERY , New



22. A message will appear indicating the request was sent. It will be routed to the HR Partner for approval. The request for SLWOP will only be considered approved once the request has also been cleared by the HR Partner.

Purpose

This procedure is used by the Primary Time Managers to assign the role of secondary time manager to members of their team.

Reference

Factsheets are provided and contain additional information on the different eligibility and documentation requirements for this subject.

This quick reference, the training simulations and Factsheets are provided for information and navigational purposes only. The United Nations Staff Rules and Regulations, and Administrative Instructions are the authoritative documents on this subject and staff members should refer to those documents for the complete eligibility and documentation requirements as it pertains to their situation.

Intended Audience

- ***Time Manager***

The role of the Time Manager is:

- Approve/reject requests from staff members for the following types of leave:
  - Annual Leave
  - Annual Leave - Reverse EGT (Education Grant Travel)
  - Annual Leave - Home Leave
  - Annual Leave - Family Visit
  - CTO Use (Compensatory Time-Off)
  - Compressed Reg Day Off
  - Travel Time for R & R (Rest and Recuperation)
  - Uncertified Sick Leave
  - Paternity Leave
- Endorse staff member's request for:
  - Special Leave
  - Rest and Recuperation
- View absence balances for staff members.
- View Team Calendar to see approved leave for the team

Global Process

The ***Primary Time Manager*** identifies one or more members of his/her team and assigns them the role of ***Secondary Time Manager***.

Pre-requisites

The ***staff member*** must a member of the ***Primary Time Manager's*** team.

Objectives

As part of the demonstration, we will show you:

- How to search for the Organizational Unit of the staff member.
- How to search for a ***staff member*** on your team.
- How to assign the ***staff member*** the role of ***Secondary Time Manager***.
- How to extend the assignment of the ***Secondary Time Manager***.

Scenario

The ***Primary Time Manager*** assigns or extends the assignment of a ***Secondary Time Manager***.

Demonstration #1 - Assigning a new Secondary Time Manager

Demonstration #2 - Extending a Secondary Time Manager's assignment

Menu Path

Use the following menu path(s) to begin this process:

Home>User Map>Secondary Managers

Procedure

1. Start the transaction using the menu path

Home>User Map>Secondary Managers

Welcome to Umoja



2. Click on the User Map link.

User or Employee Search

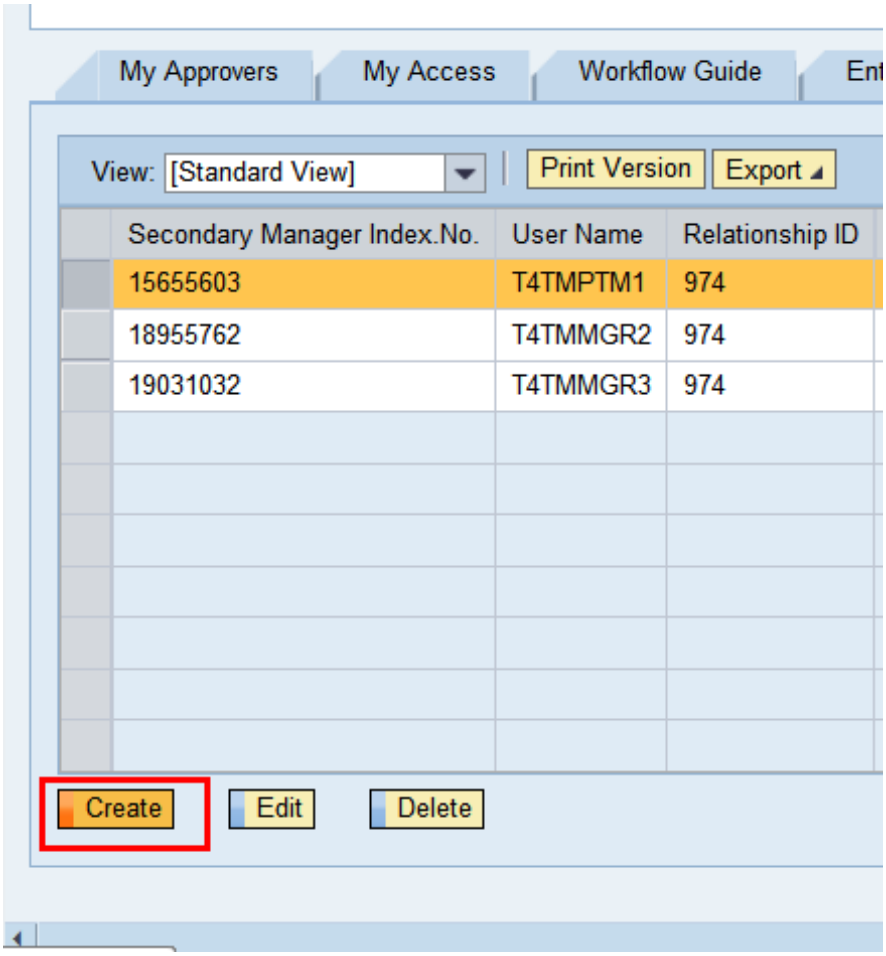


3. Click on the Secondary Managers tab.

If any secondary time managers have been assigned, they will appear in the list as in our example below. Next, you will be adding an additional secondary manager to the existing list.

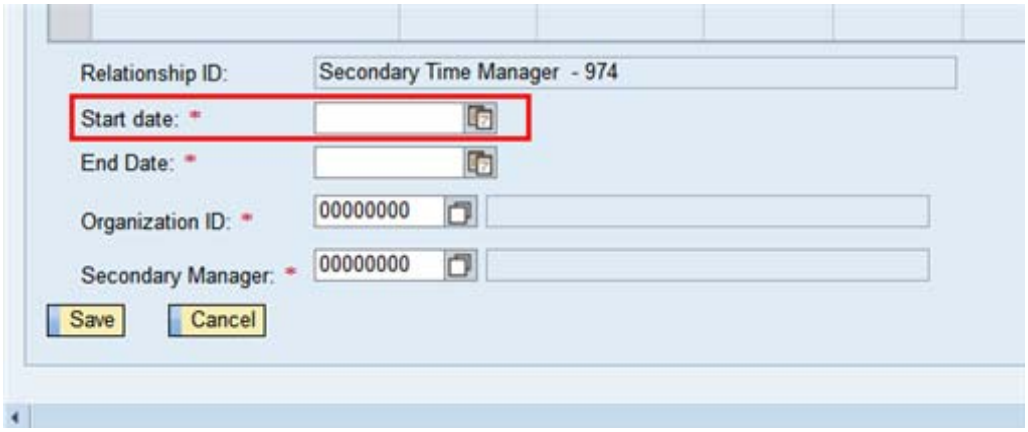
Demonstration #1 - Assigning a new Secondary Time Manager

User or Employee Search



4. Click on the Create button.

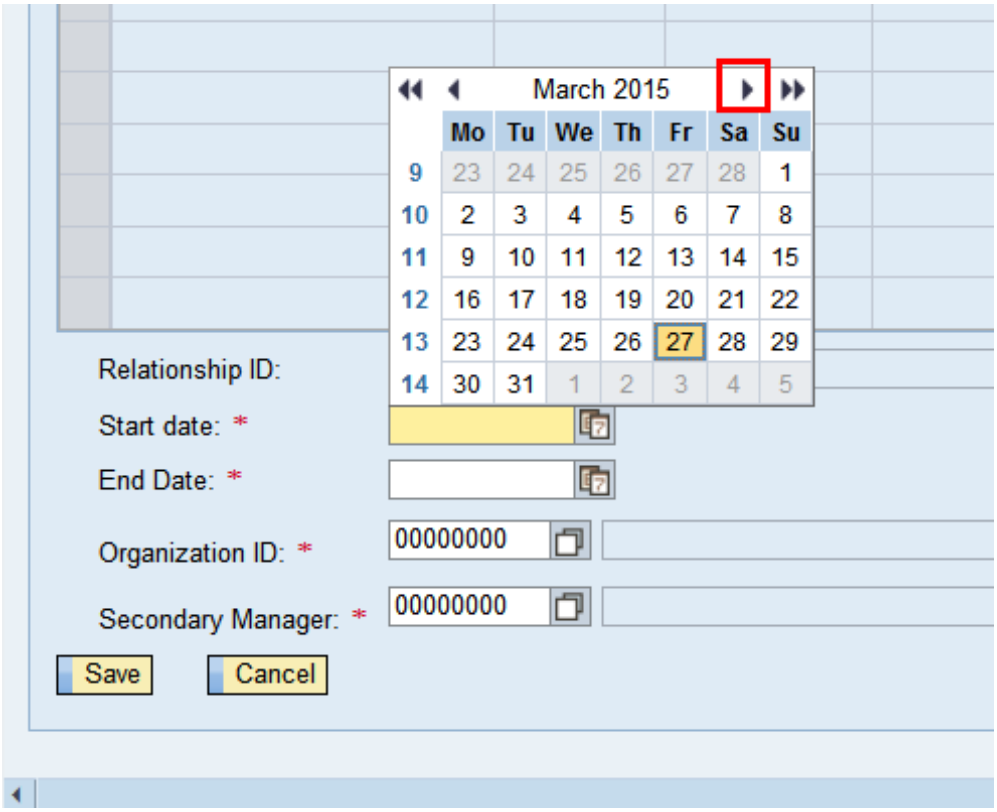
User or Employee Search



5. Select or enter the date you want the secondary time manager's time approval rights to begin. In this demonstration, you will click on the calendar icon to select the date.

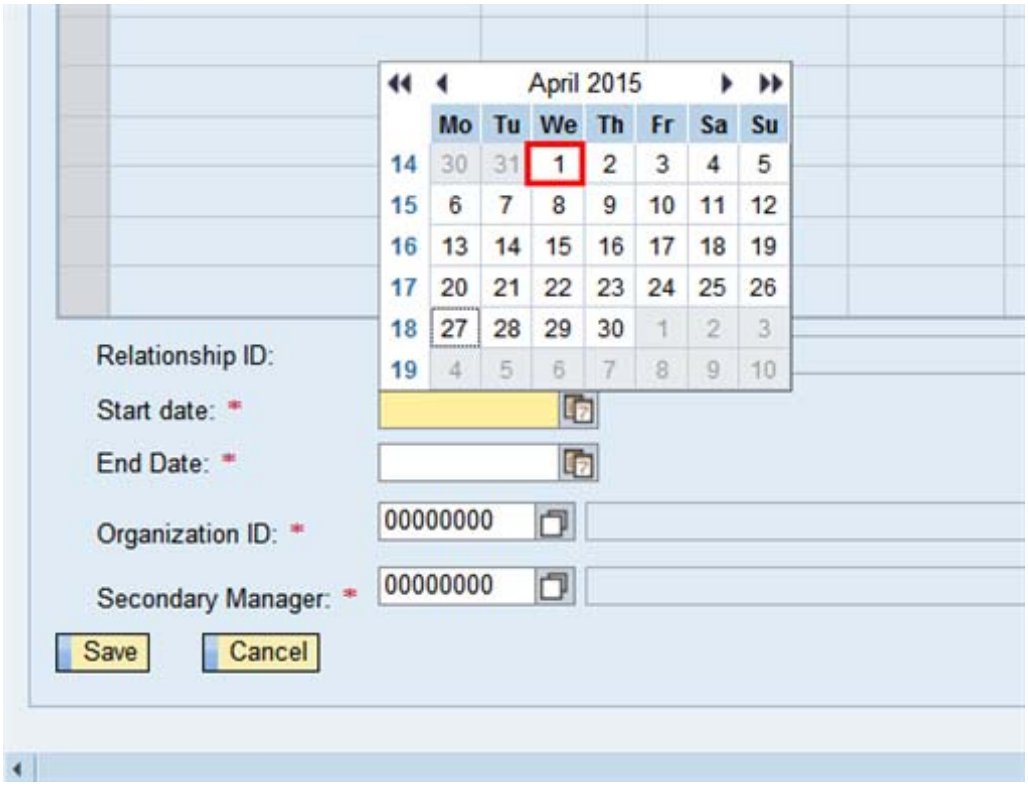
You will be assigning a secondary time manager for the period of 1 April 2015 to 10 April 2015.

User or Employee Search



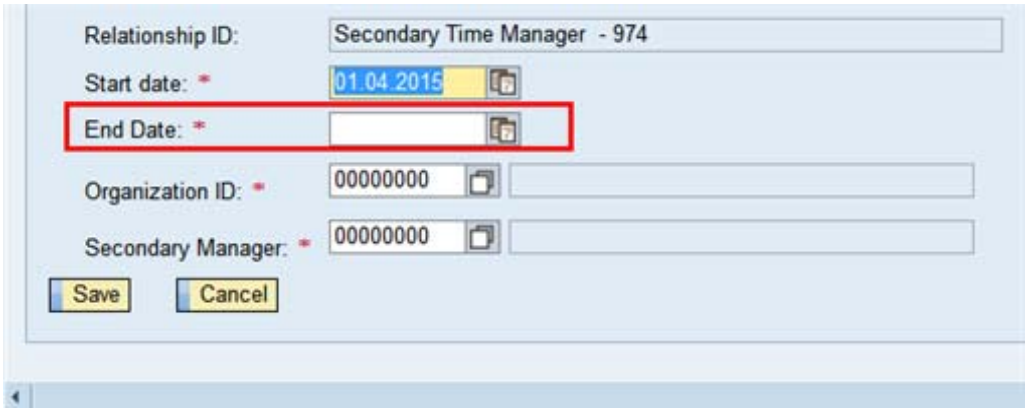
6. Click on the Next Month icon.

User or Employee Search



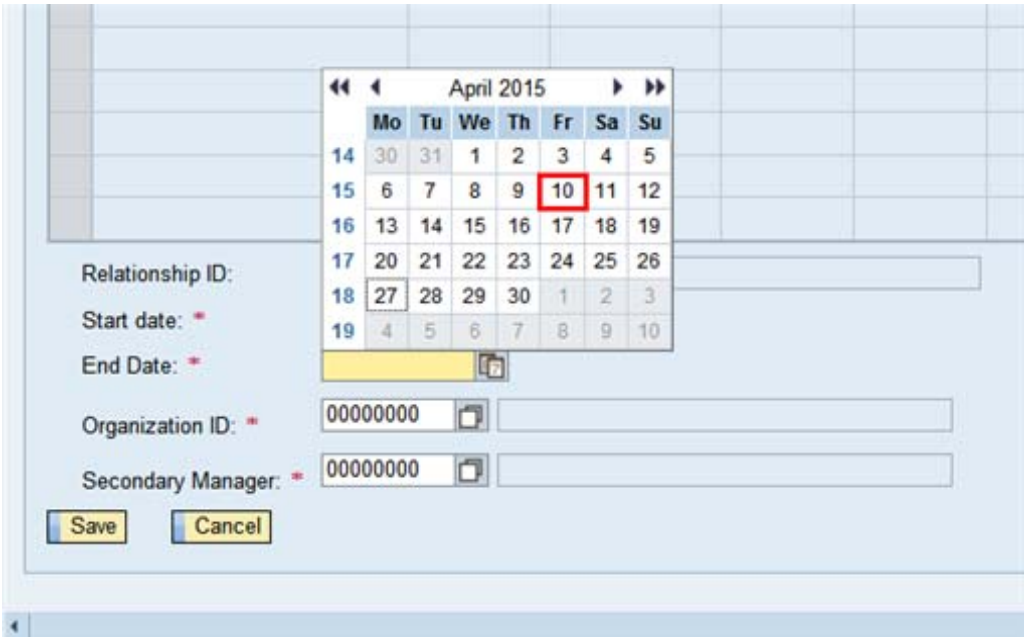
7. Click on the start date. In this demonstration, you will click on the 1st of April.

User or Employee Search



8. Select or enter the date you want the secondary time manager's time approval rights to stop. In this demonstration, you will click on the calendar icon and select a date.

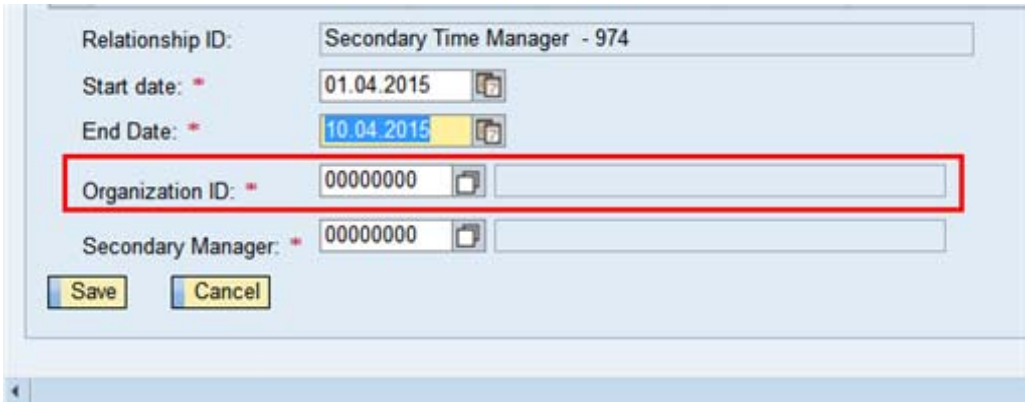
User or Employee Search



9. Click on the end date. In this demonstration you will select the 10th of April. If you do not want the approval rights to end, then enter 31.12.9999.

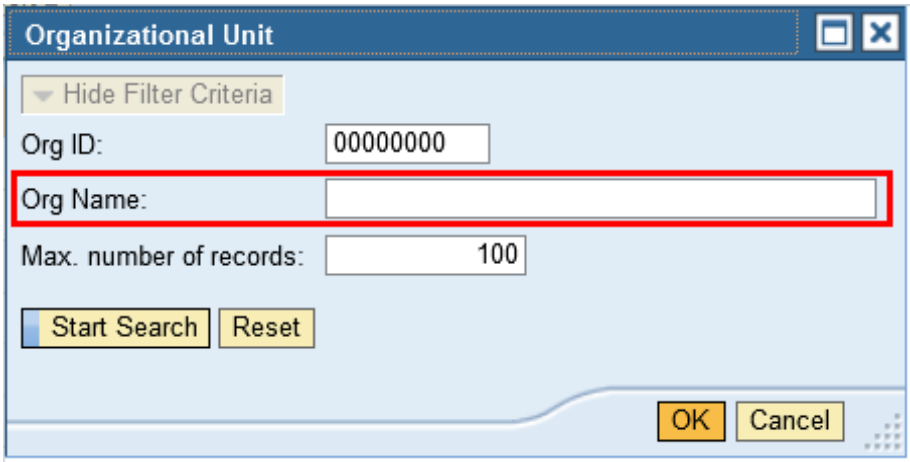
Next, you will be selecting the Organizational Unit of the secondary manager.

User or Employee Search



10. Enter or select the organizational unit ID you will be assigning to the secondary time manager. In this demonstration you will click on the icon to search for the Organization ID.

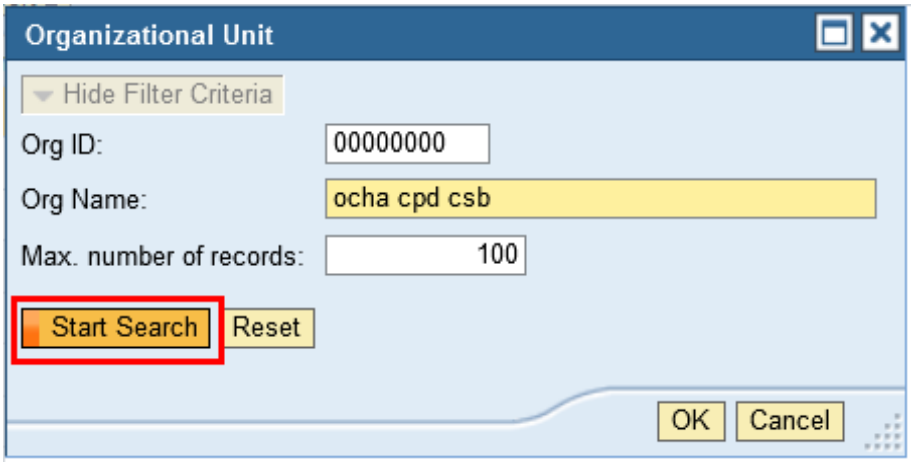
Organizational Unit



11. Enter the organization number or name. In this demonstration you will enter the organization's name OCHA CPD CSB.

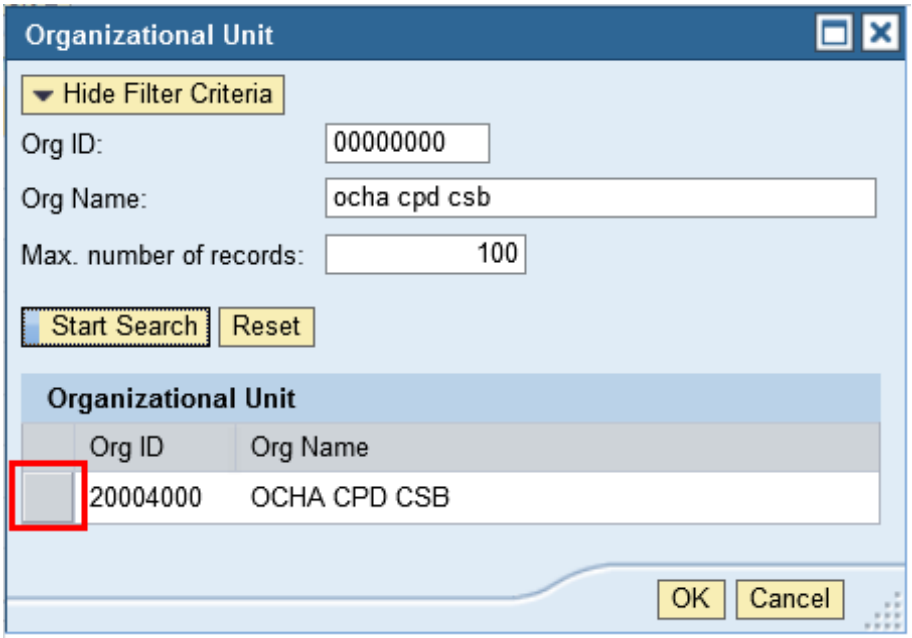
If you do not know the exact acronym for the organization, you can use wildcards (e.g. OCHA*) and a list of all OCHA organizations will appear from which you can select.

Organizational Unit



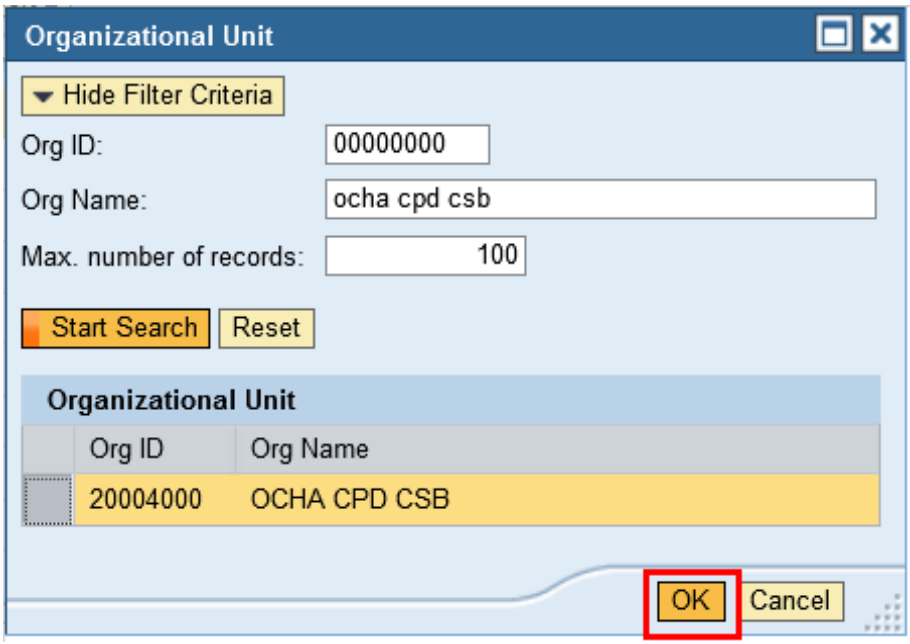
12. Click on the Start Search button.

Organizational Unit



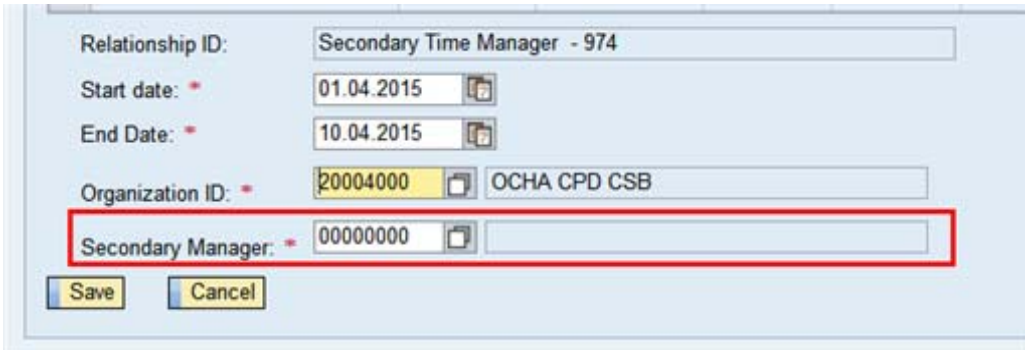
13. A list of organzational units that match the name entered appear. Select the organizational unit by clicking on the gray box next to the applicable unit.

Organizational Unit



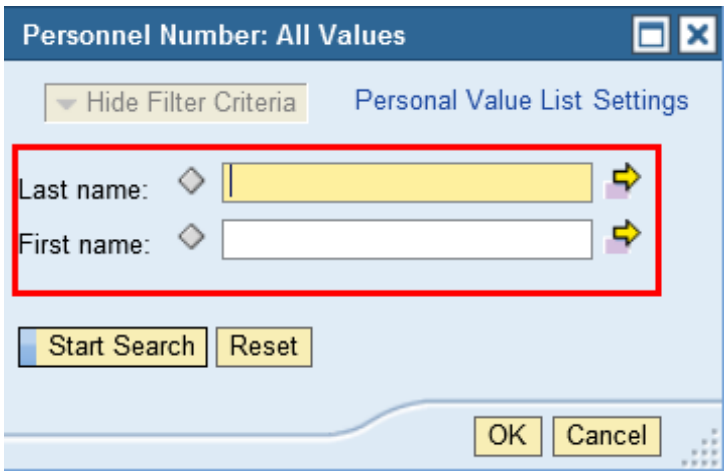
14. Click on the OK button. The information will appear in the Organization ID field.

User or Employee Search



15. If you know the secondary time manager's personnel number, then enter the number, otherwise, click on the icon to search by last and/or first name.

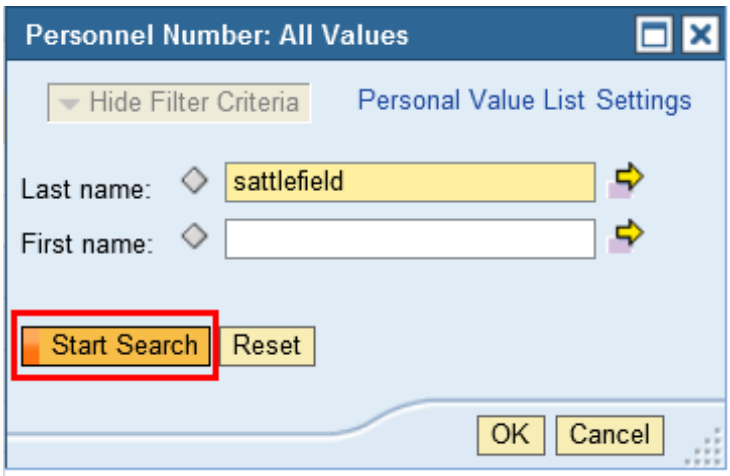
Personnel Number: All Values



16. Enter the secondary time manager's Last and/or first name. In this demonstration, you will enter their last name, "Sattlefield".

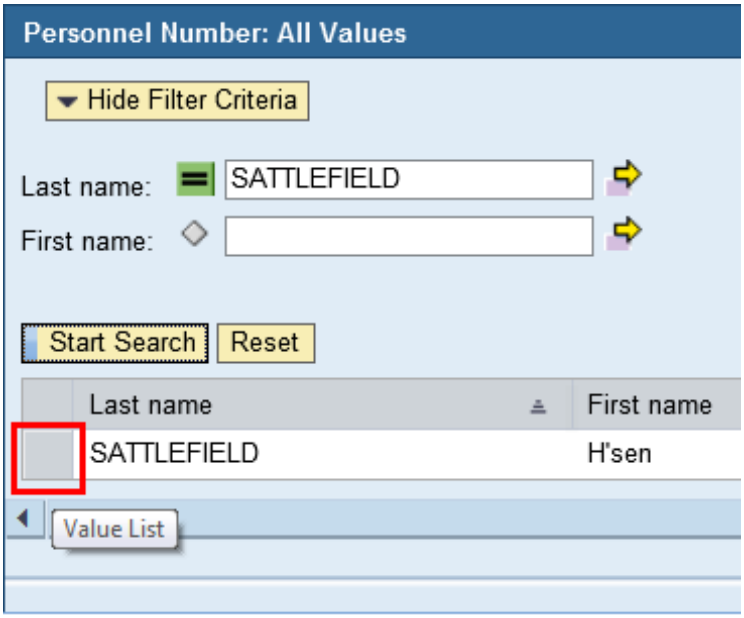
If you do not know the spelling of the name, you can use a wildcard (e.g. Satt*) and a list of members on your team that contain the letters entered will appear for you to select.

Personnel Number: All Values



17. Click on the Start Search button. A list of staff members matching the entry will appear.

Personnel Number: All Values



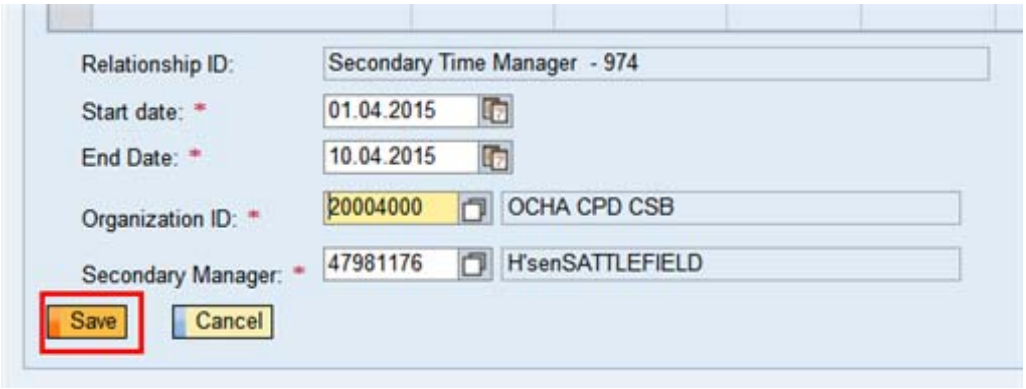
18. Select the applicable staff member by clicking on the gray button next to the staff member's name.

Personnel Number: All Values



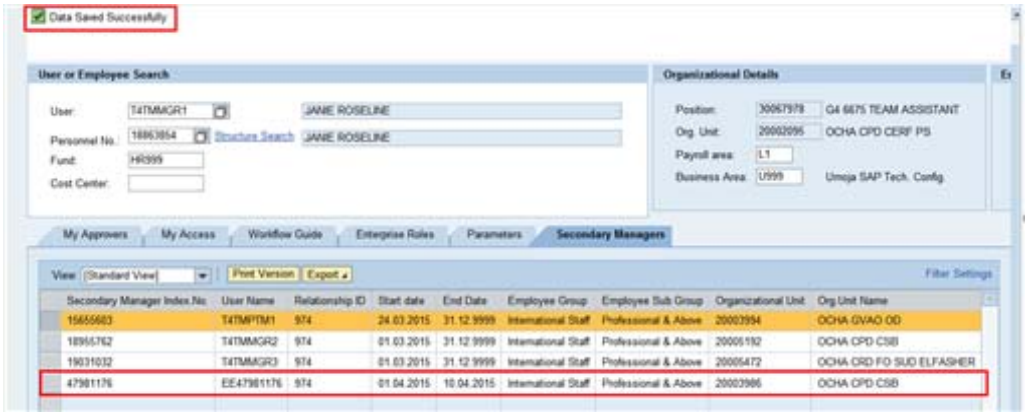
19. Click on the OK button. The selected staff member will appear in the Secondary Manager field.

User or Employee Search



20. Click on the Save button.

User Map - Umoja training portal - T2J



21. A message appears that the assignment of a secondary time manager was successful.

The secondary time manager appears in the list by Index No. (Personnel No.)

Next, you will extend the time period of the secondary time manager's assignment.

Demonstration #2 - Extending a Secondary Time Manager's assignment

You can extend the end date for the secondary time manager by selecting the manager from the list and clicking on the Edit button. If there is a gap between assignments, then you would have to create a new entry. For example:

1 - The secondary time manager's assignment ends on 10 April 2015, if you want to extend it until 24 April 2015, select the manager, click on the Edit button and change the end date.

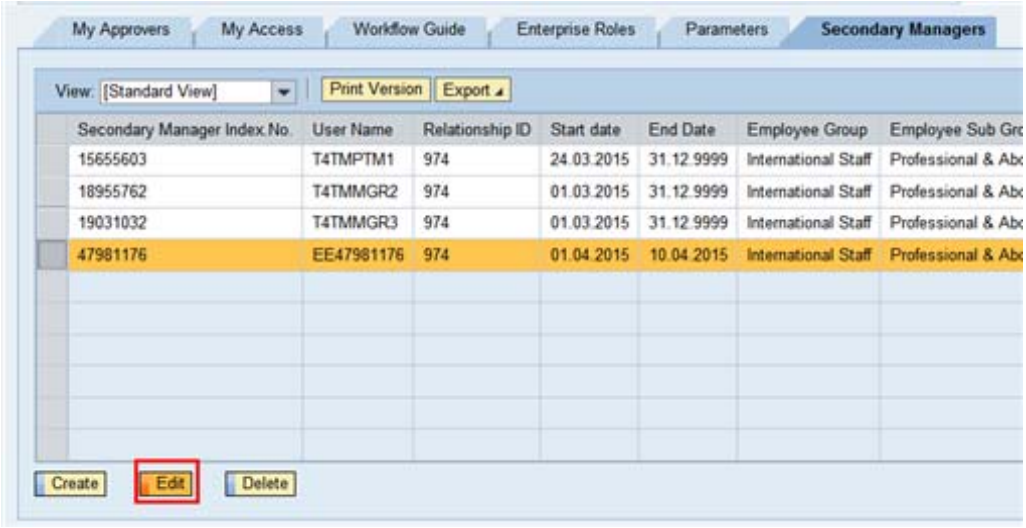
2 - The secondary time manager's assignment ends on 10 April 2015, you want to assign another period of time (1 June 2015 to 15 June 2015), then you would click on the Create button and create a new entry for the time period.

User or Employee Search



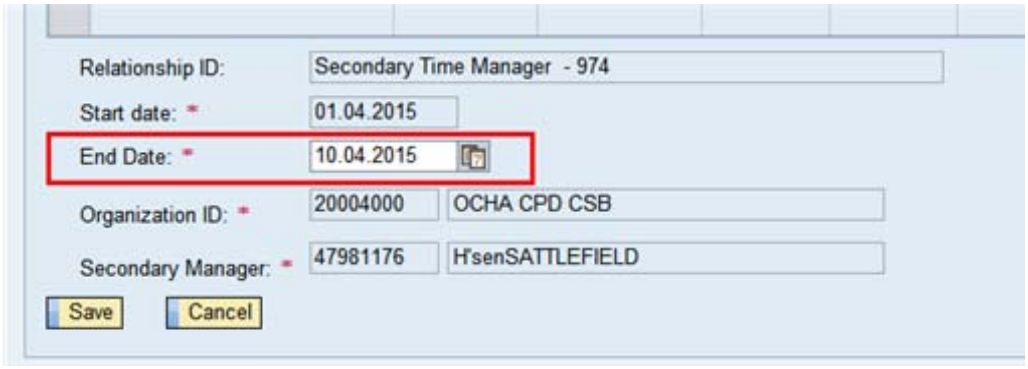
22. Select the Secondary Manager for which you want to extend their assignment by selecting the gray button.

User or Employee Search



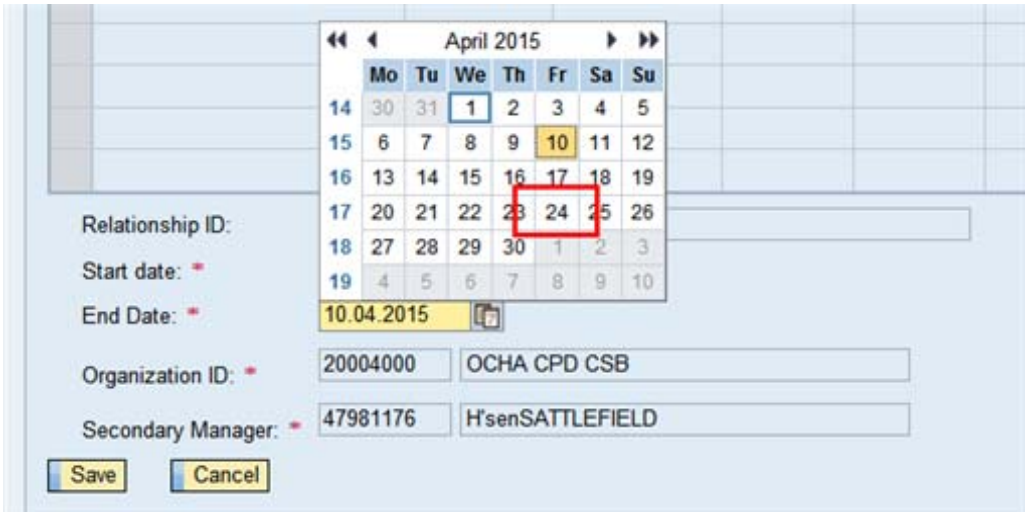
23. Click on the Edit button.

User or Employee Search



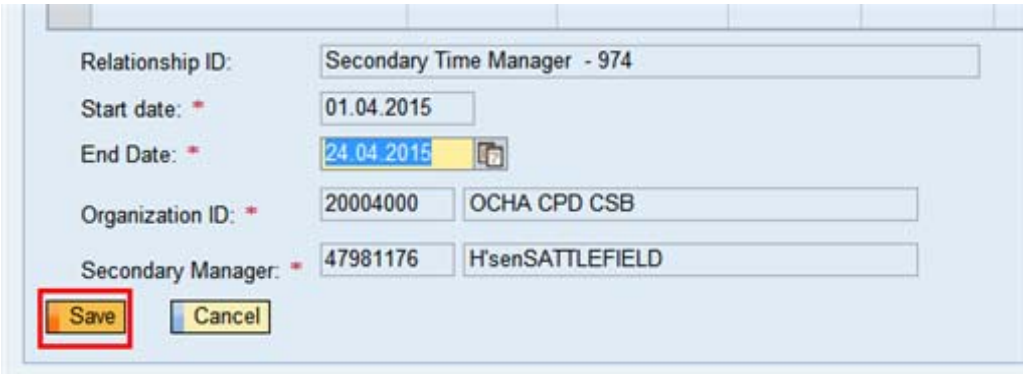
24. Enter or select the date you want to extend the assignment. In this scenario you will be extending the manager's assigment intil 24 April 2015. Click on the calendar button.

User or Employee Search



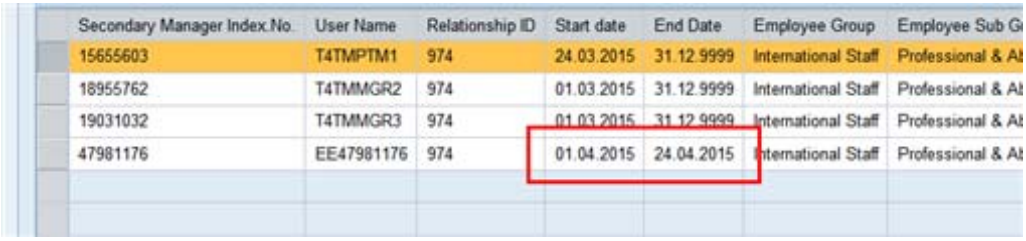
25. Select the date, 24 April 2015.

User or Employee Search



26. Click on the Save button.

User or Employee Search



27. The new End Date for the assignment will appear in the list. Click on any of the tabs to perform your next task.

Overview

This Job Aid documents International Staff Member's Self-Service creation of a Within Mission – for DFS Travel Request. This also applies to Travel Administrator's creation of Within Mission – for DFS Travel on behalf of staff members and non-staff members who do not have access to Umoja.

You will be required to raise a Travel Request in Umoja if any of the following apply:

1. Travel Advance Requested
2. Commercial Air/Rail Ticket Required
3. Duration of Travel exceeds three (3) days
4. Entity decides a Travel Request is required for Within Mission – for DFS Travel

Within Mission Travel may occur without a Travel Request. Staff Member must complete an Expense Report within seven (7) days upon completion of travel; all of the following conditions must apply:

1. Travel Advance NOT requested
2. Commercial Air/Rail Ticket NOT required
3. Duration of Travel does NOT exceed three (3) days

Objectives

This Job Aid will walk the staff member and/or Travel Administrator through the process of creating a Within Mission – for DFS Travel Request as well as sending the request for approval.

Menu Path

Use the following menu path to begin this transaction:

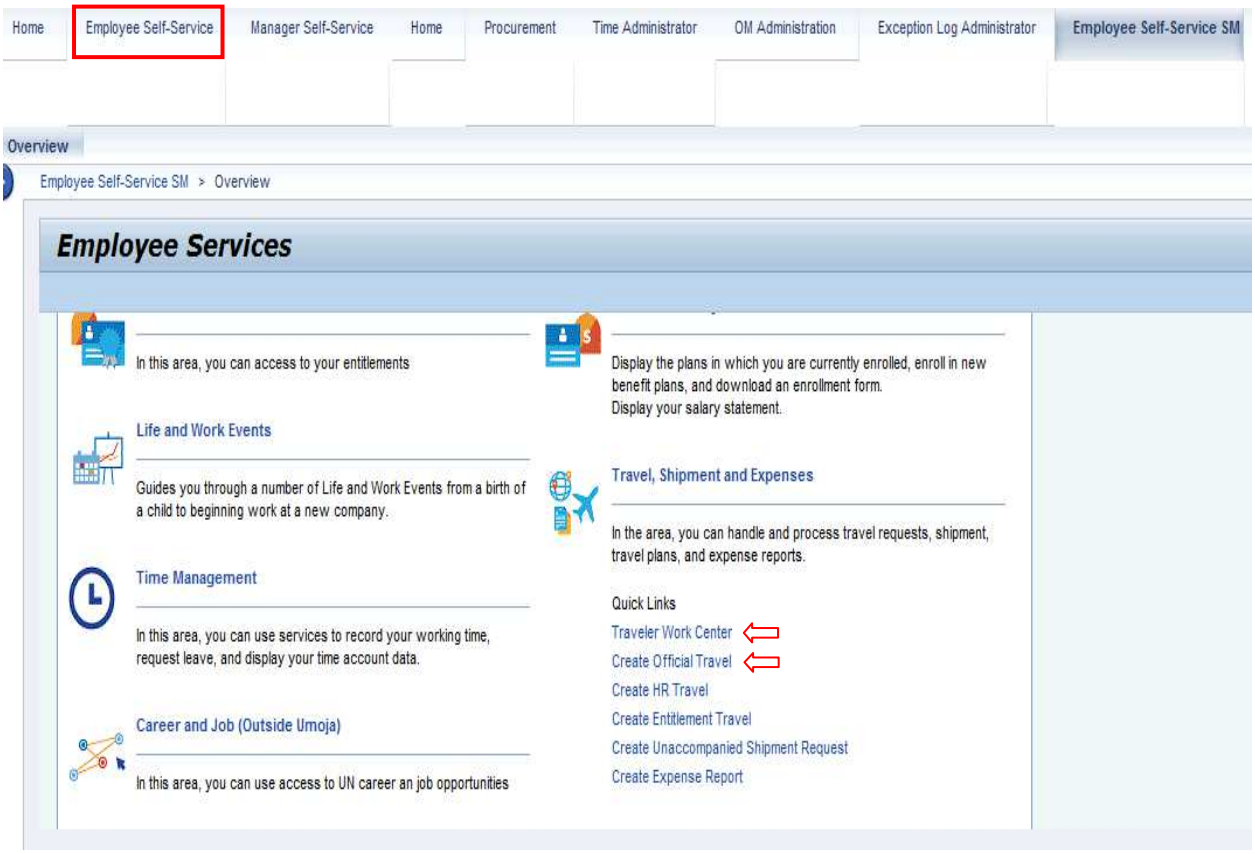
- Employee Self-Service ➔ Time Management (Request Leave)
- Employee Self-Service ➔ Create Official Travel Request or
- Employee Self-Service ➔ Traveler Work Center ➔ Create Travel Request

* *

Procedure (Scenario – Within Mission Travel with Advance)

1. Click on the *Employee Self-Service SM* tab.

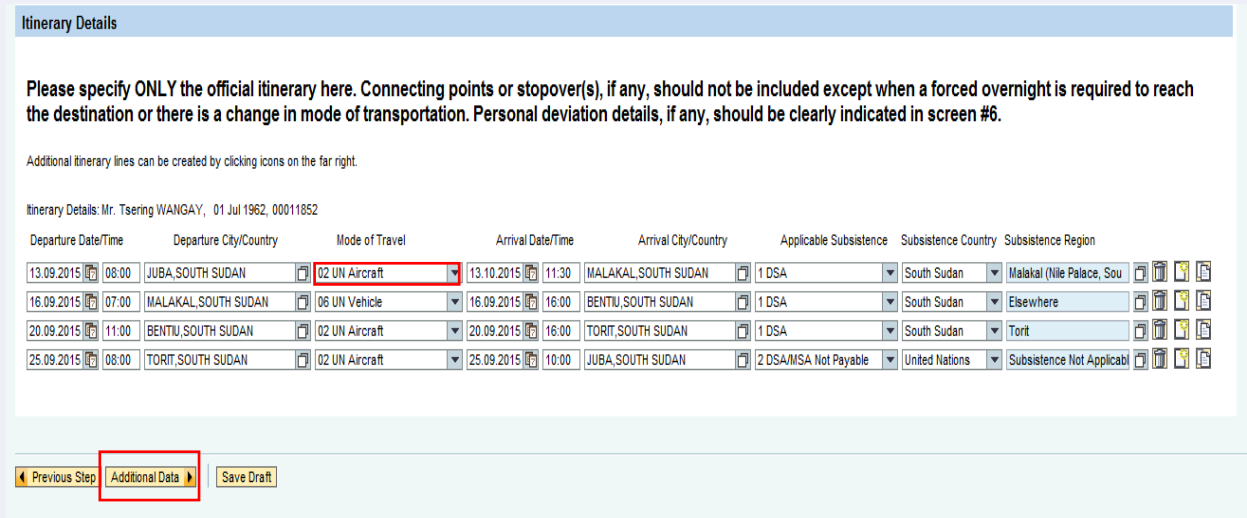
2. Start the transaction using the menu path detailed above to *Create Official Travel Request*.



3. Select the appropriate Travel Type. *"0.Within Mission – for DFS"*
4. Click the *Overview* button and proceed to the *General Data* page to begin entering information about the Traveler's upcoming trip.

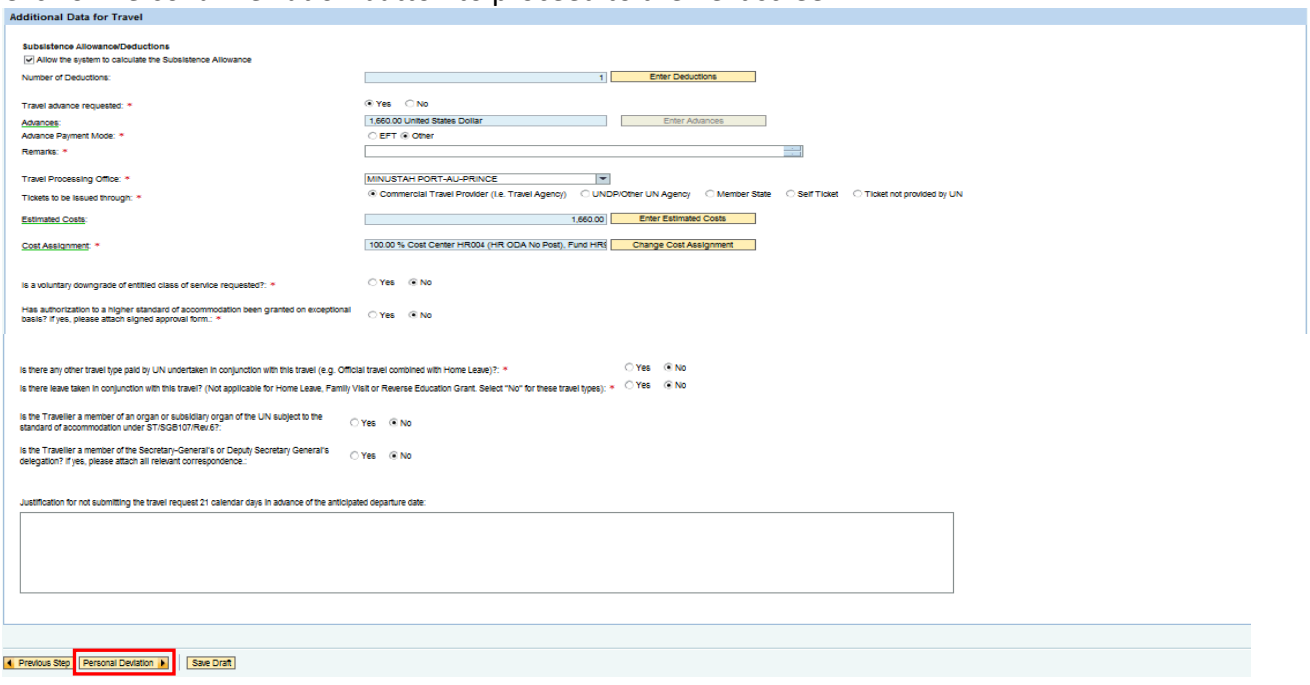


5. Select the appropriate Traveler Type and complete the following fields: Itinerary, Journey Type, Mode of Travel (UN Aircraft and/or UN Vehicle), Subsistence Country, and Region. After all required fields are filled out, select the *Additional Data* button to continue.

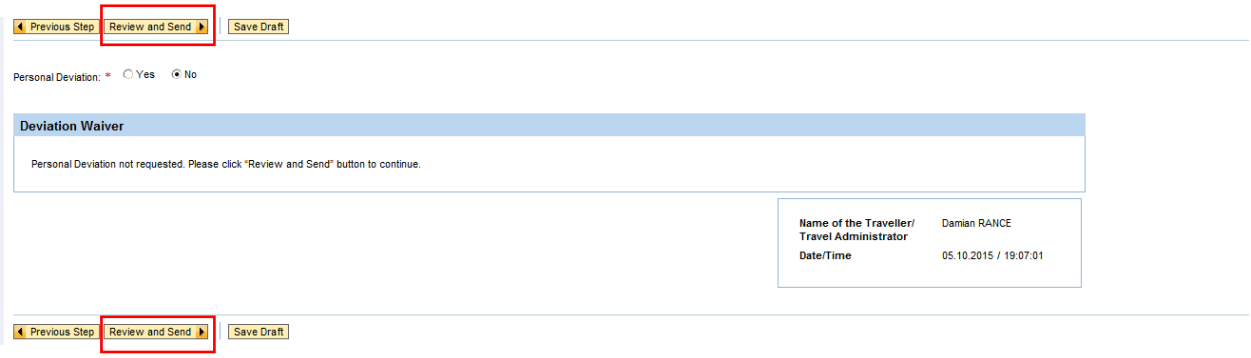


6. On the *Additional Data* page, Traveler should perform the following:
   - Select *Allow for the System to Calculate Subsistence Allowance*
   - Enter Deductions
   - Request Travel Advance & Identify Payment Method
   - Enter Estimated Costs
   - Answer all mandatory questions

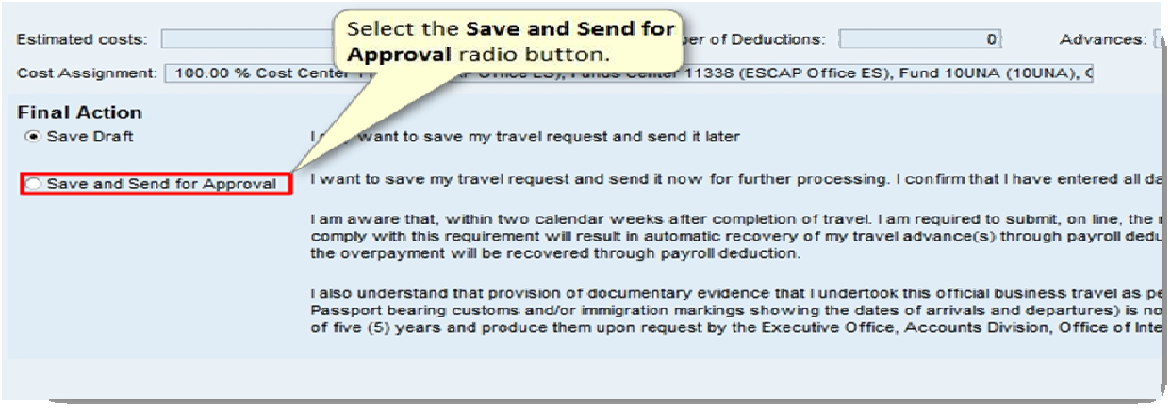
7. Click on *Personal Deviation* button to proceed to the next screen.



7. On the *Personal Deviation* page indicate whether a Personal Deviation is applicable, choose the *Review and Send* button to submit Travel Request.



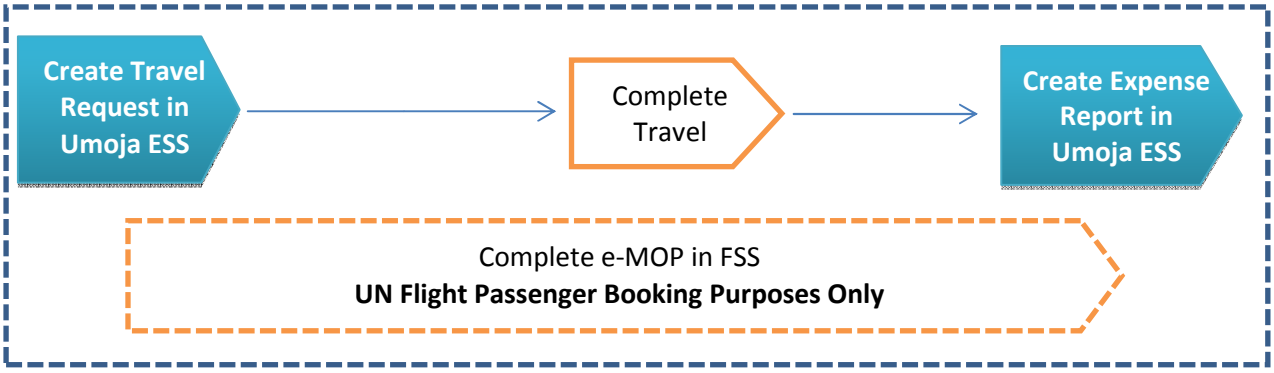
8. Select the *Save and Send for Approval* button to confirm information and send for approval.



It is the traveler's responsibility to read, understand, and comply with information provided within this document. Prior to traveling, security and medical clearances should be obtained by logging into TRIP (https://dss.un.org/) to complete system-generated information and contact local medical services to determine if medical clearance is required.

Travel 'Within Mission – DFS Only' on UN Aircraft requires the creation and submission of an Electronic Movement of Personnel Document (eMOP) processed in Field Mission Support Suite (FSS). The creation of an eMop facilitates the booking of a seat on a UN Aircraft.

Submission of an Expense Report in Umoja within fourteen (14) days is mandatory. Failure to do so will result in the automatic recovery of the travel advance provided. Additional Expense Reports with expenses not claimed on the primary Expense Report cannot be processed in the system until the primary Expense Report has been submitted and approved.



eMOP is not required if travel is undertaken by UN Vehicle. Appropriate Travel Type should be selected when completing the Umoja Travel Request.

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Overview

This Job Aid documents travelers' Employee Self-Service creation of a Request for Rest and Recuperation (R&R) with the following three scenarios:

- Request for UN Paid Ticket
- Request for Lump Sum
- Request for Free UN Transport

Objectives

This Job Aid will walk the Travelers or Travel Administrator through the process of creating a R&R via UN Paid ticket, Lump Sum Option, or Free UN Transport, as well as sending the request for approval.

Menu Path

Use the following menu path to begin this transaction:

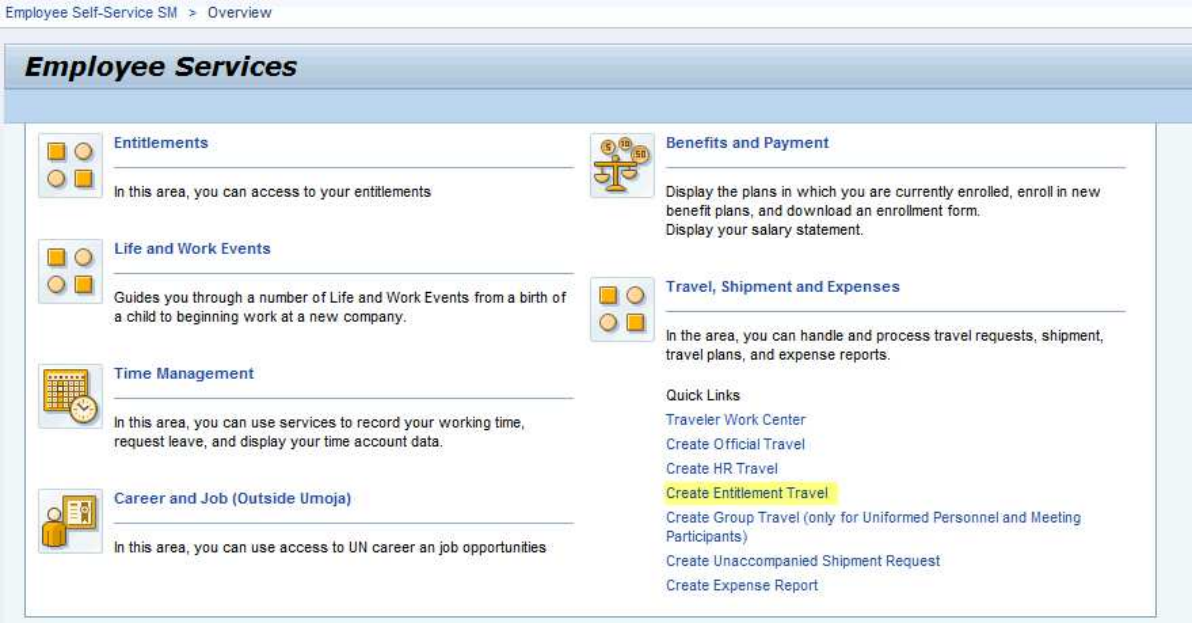
- Employee Self-Service ➔ Time Management (Request Leave)
- Employee Self-Service ➔ Create Entitlement Travel

Note: All staff are reminded to obtain an approved Leave Request prior to submitting a Travel Request.

Create Rest and Recuperation Request

1. Log into *Employee Self-Service* Portal.

2. Click on *Create Entitlement Travel.*



3. On the *Important Information* page, acknowledge that you have read and completed all the necessary **Travel Initiation Pre-requistites**.

   Note: It is the Traveller's responsibility to ensure that these conditions are met prior to creating any Travel Request.

4. Click on *Start Form.*

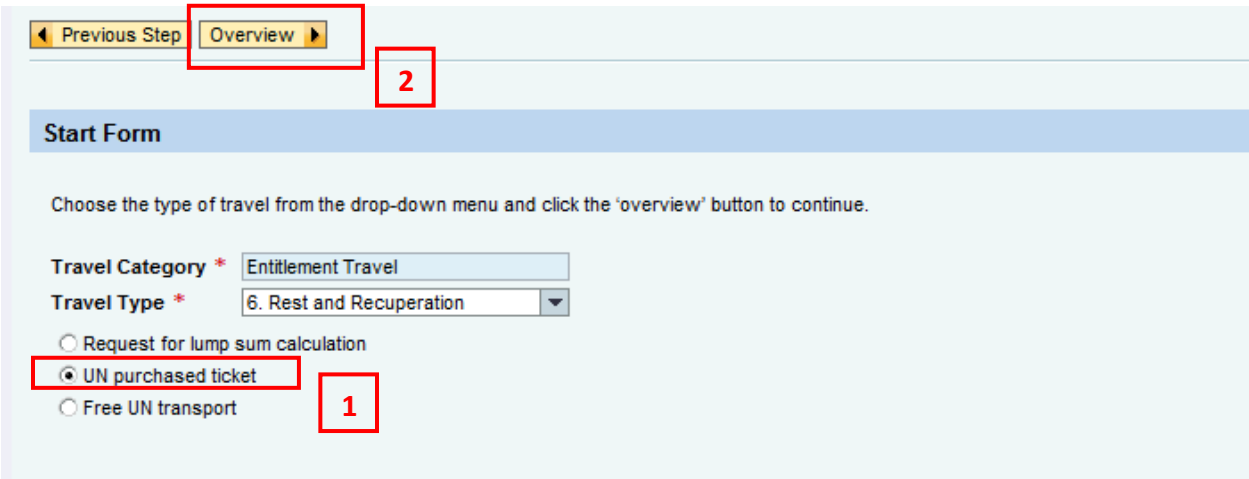
5. Select *Travel Category* and *Travel Type*.

Scenario 1: Rest and Recuperation with UN Purchased Ticket

The United Nations will purchase a ticket on behalf a staff member to the mission/entity's authorized R&R destination if they choose not to avail of the lump sum option for R&R and when UN Aircraft does not service the destination.

1. Select *UN purchased ticket*.

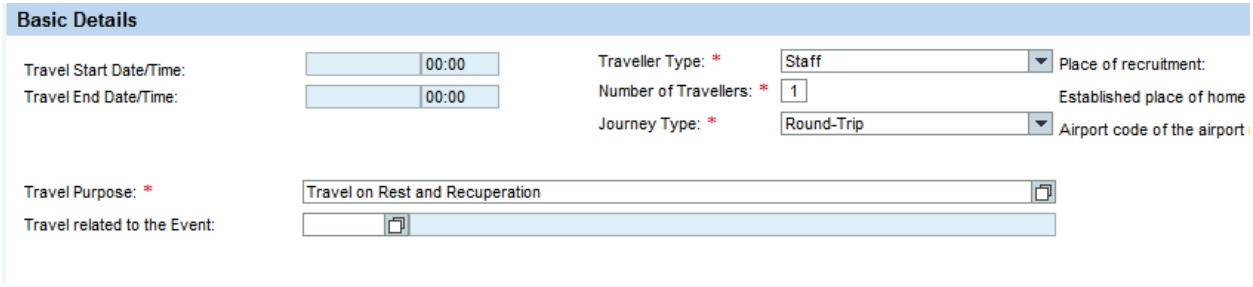
2. Click on *Overview* to go to the next page.

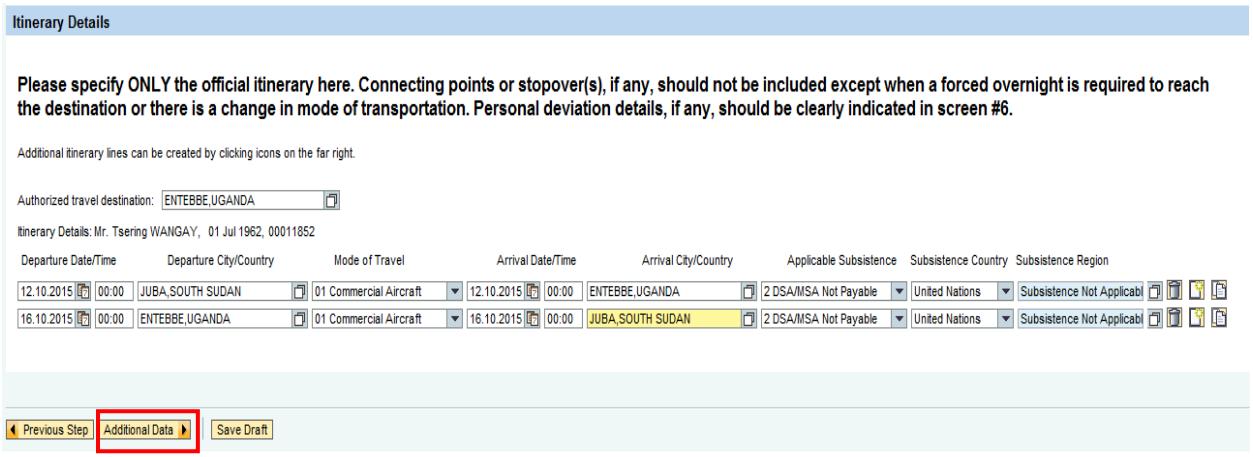


General Data Page

3. Fill in all details related to this trip and the approved itinerary. Once details are completed, click on *Additional Data*.

   Note: The approved itinerary is the entity/mission authorized R&R destination. Travel to destinations other than the authorized R&R destination must be reflected under *Personal Deviation*.

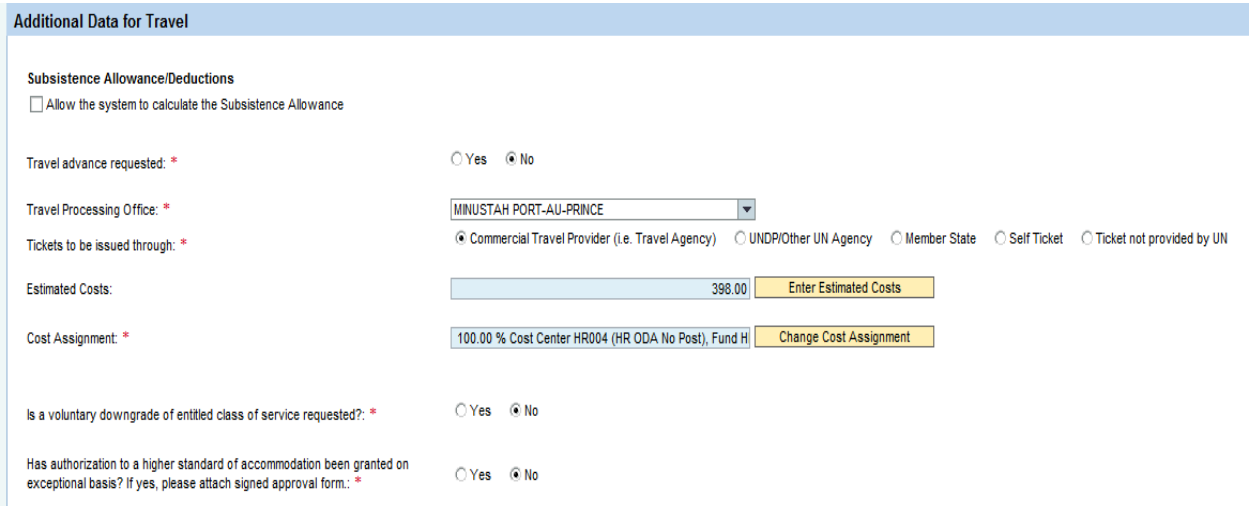




Additional Data

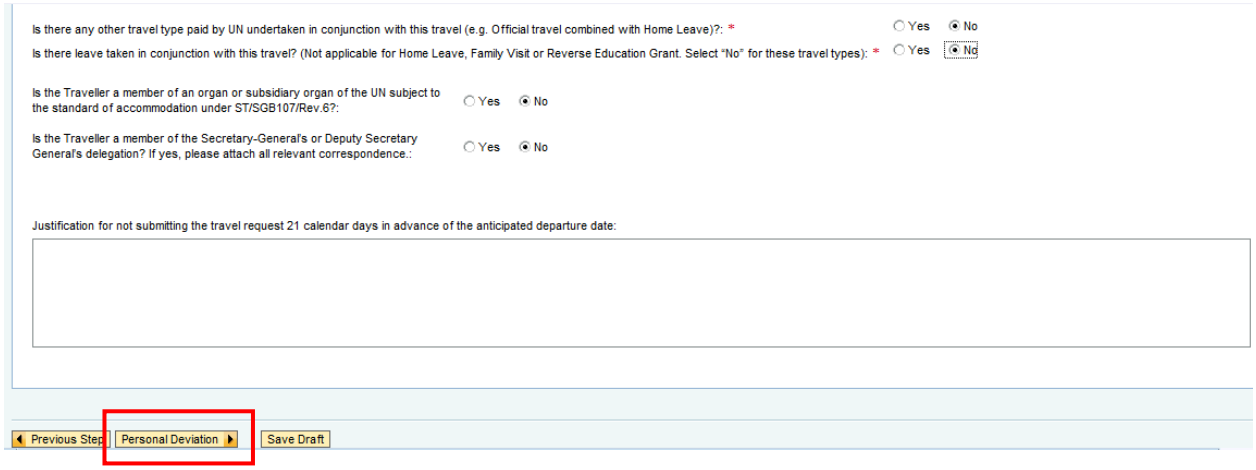
4. On the *Additional Data* Page the traveler should perform the following:

   - Leave unchecked, "*I want the system to calculate the Subsistence Allowance "* (**Subsistence Allowance is not paid for Rest and Recuperation**)
   - Select the appropriate choice for *Tickets to be issued through.* In this case, select *Commercial Travel Provider (i.e. Travel Agency)*.
   - *Enter Estimated Costs* for air ticket
   - Answer all relevant questions



5. Go to *Personal Deviation*.

   Note: Traveler to indicate in this section any destination that differs from the entity/mission's authorized R&R destination.

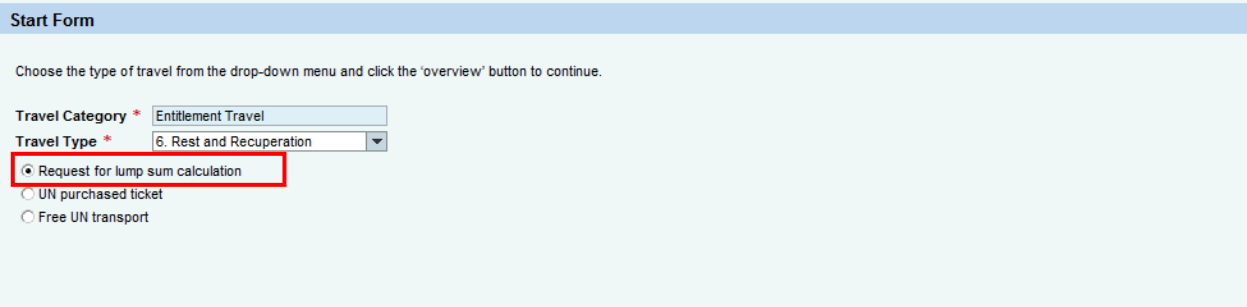


Scenario 2: Rest and Recuperation with Request for Lump Sum

The United Nations will provide a lump sum payment (cost of air ticket to authorized R&R destination inclusive of taxes) to a staff member if they choose not to avail of the UN provided ticket for R&R and when UN Aircraft does not service the destination.

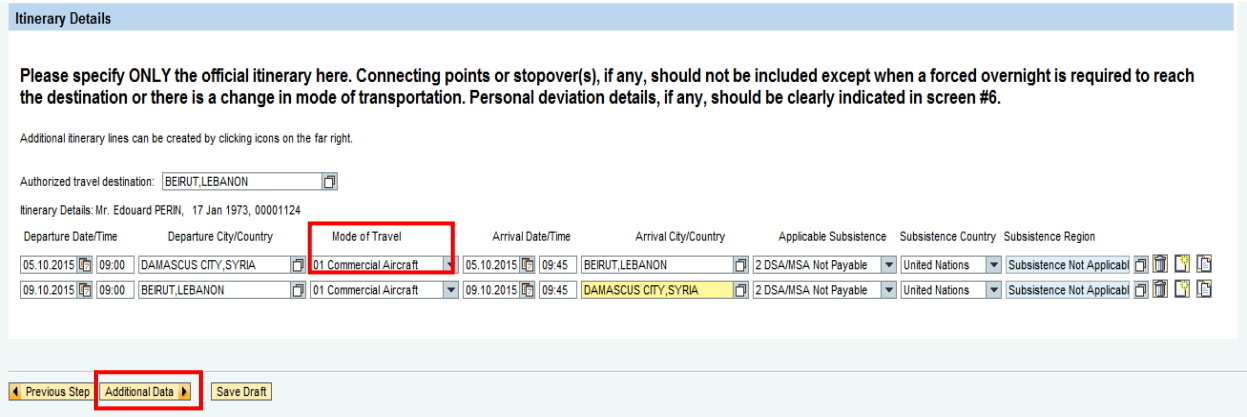
After completing steps 1 &2 as detailed above under *Create Rest and Recuperation Travel Requests*, proceed as follows:

1. Select Request for *Lump Sum Calculation*



General Data Page

2. Fill in all details related to this trip and the approved itinerary. Once details are completed, click on *Additional Data*.



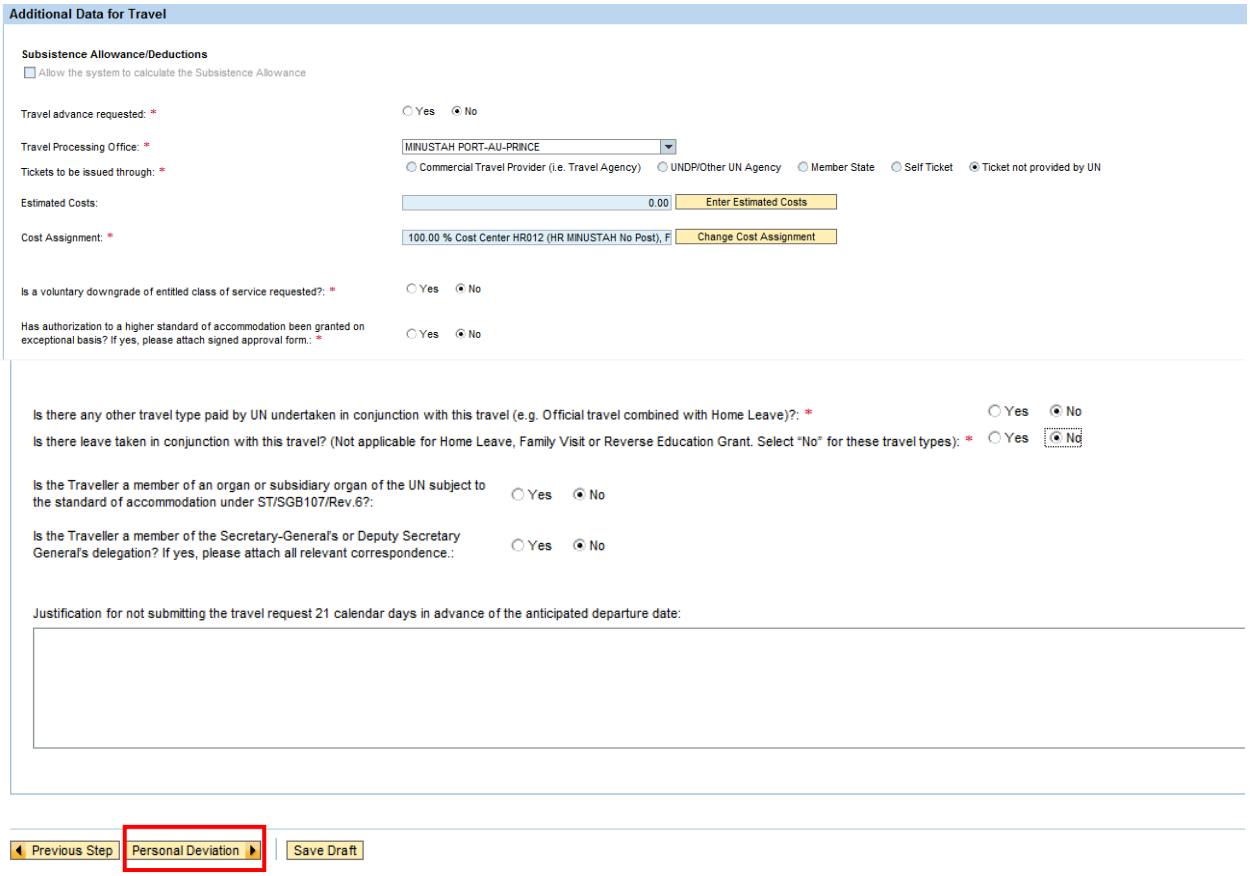
3. Click the General Data button to begin entering information about the Traveler's upcoming trip**.**

Additional Data

4. On the *Additional Data* Page the system will default to the following:

   - *I want the system to calculate the Subsistence Allowance*
   - *Tickets Not Provided by UN*
   - *Estimated Costs* not required

5. Please answer all relevant questions and choose the *Personal Deviation* button to proceed.

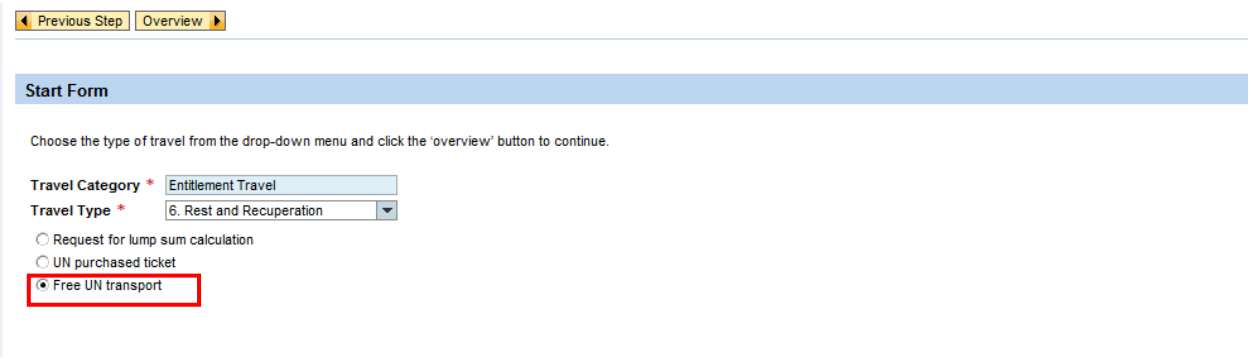


Scenario 3: Rest and Recuperation with Request for Free UN Transport

The United Nations will allow travel on UN Aircraft to the authorized R&R destination when UN Aircraft services the destination. A lump sum or UN provided air ticket is not an option.

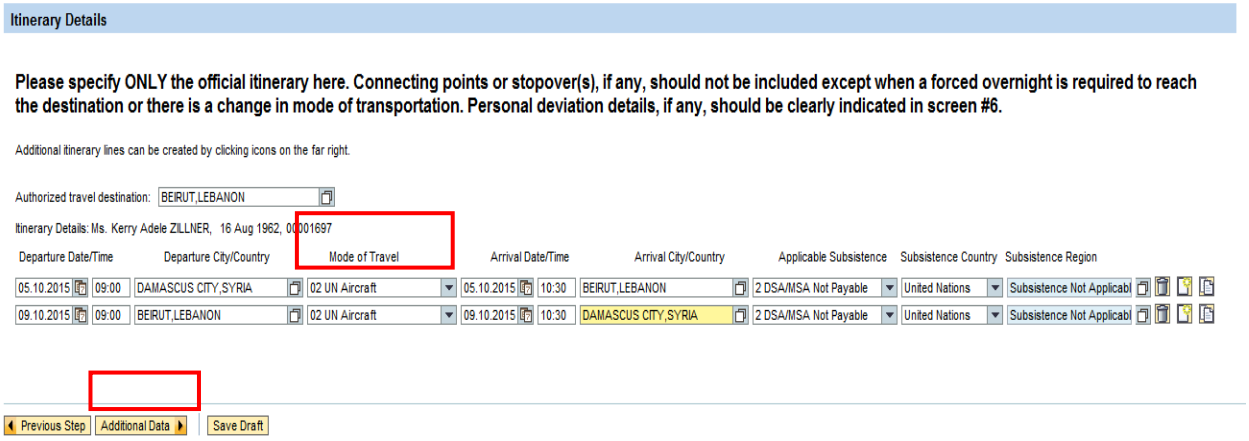
After completing steps 1 & 2 as detailed above under *Create Rest and Recuperation Travel Requests*, proceed as follows:

1. Select Request for *Free UN Transport*



General Data Page

2. Fill in all details related to this trip and the approved itinerary. Once details are completed, click on *Additional Data*.

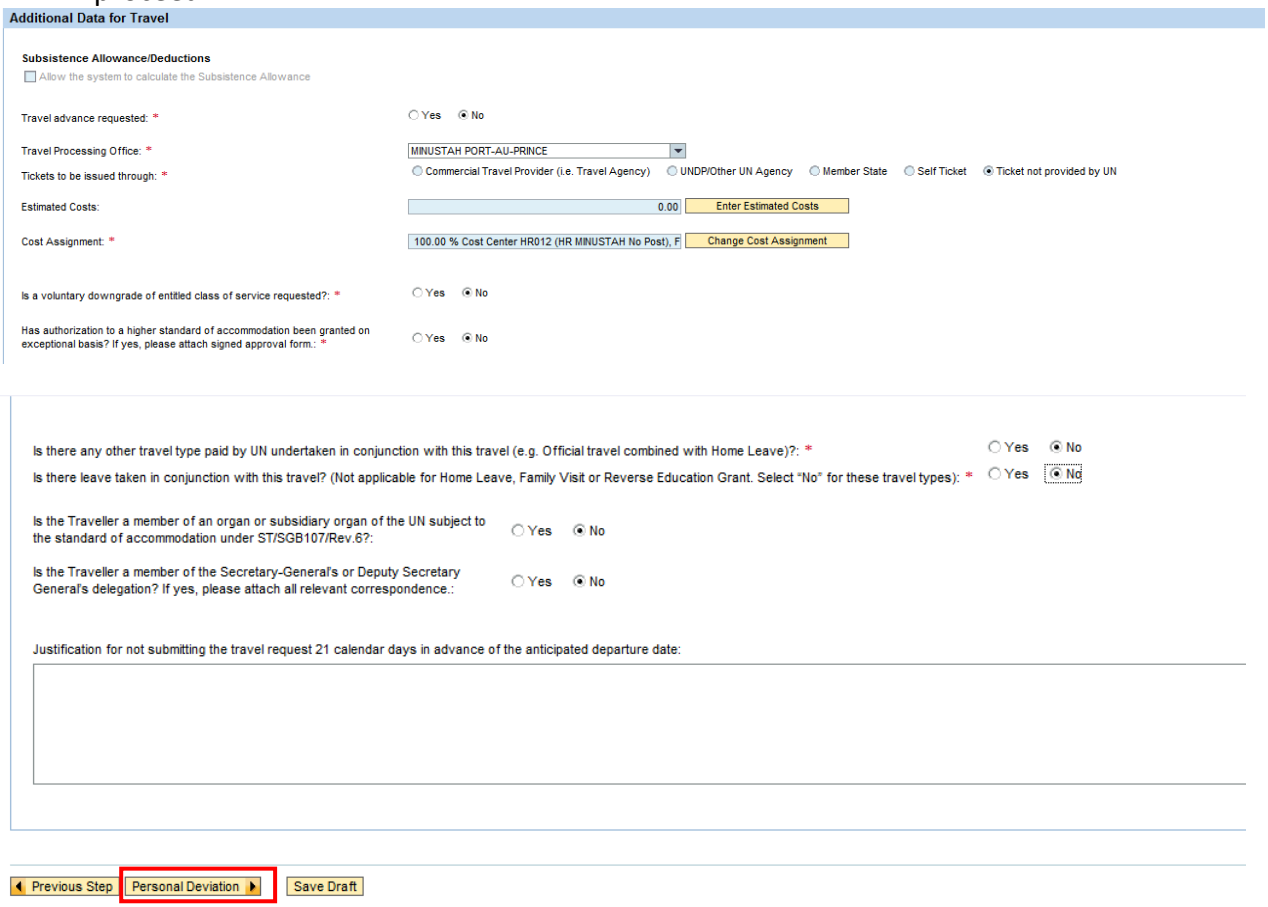


Additional Data

3. On the *Additional Data* Page indicate the following:

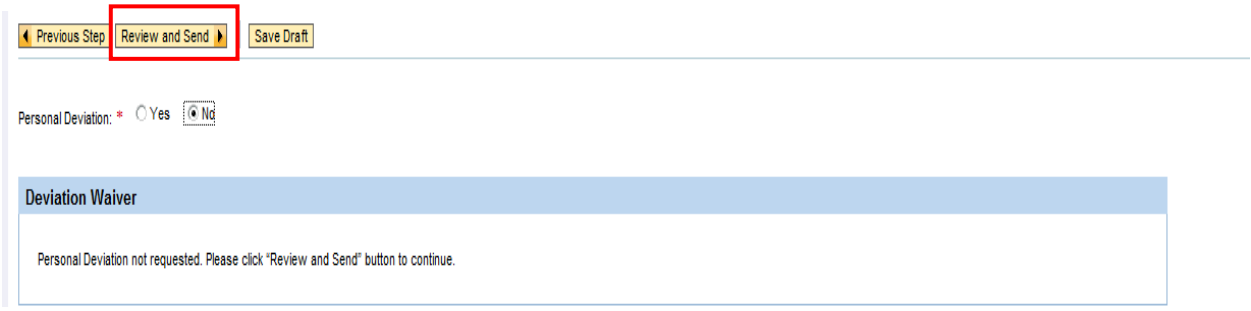
   - *Tickets Not Provided by UN*
   - *Estimated Costs* not required

4. Please answer all relevant questions and choose the *Personal Deviation* button to proceed.



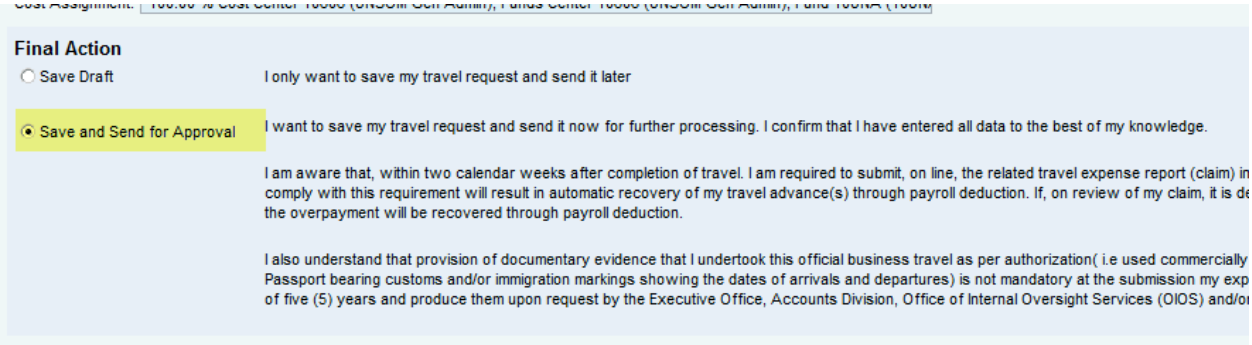
Personal Deviation

5. On the *Personal Deviation* page, click *"Yes"* if any deviation from the approved route, stopovers, etc. Otherwise click *"No"* and click on *Review and Send.*



Complete the Request and Send for Approval

6. Click on *Save and Send for Approval* if you want to submit the request now, if not, then *Save Draft* and you can get back to it later.



General Overview on the Subsequent Approval Process

All Entitlement Travel, once submitted, will go to HR Partner for approval. In case of Free UN Transport, HR Partner approval ends the workflow. If other options of travel are selected, UN to provide Commercial Ticket or Lump Sum Option, request will continue through the workflow to the Travel Shipment Approver, and Travel Processing Office.