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.

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** 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
2. Click on the Employee Self-Service 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”.
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.

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%.
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.
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.

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