HRITS

eFactSheet

eFact Sheet Admin Module Guide

OHRM.HR INFORMATION TECHNOLOGY SECTION

eFact Sheet Admin Module Guide

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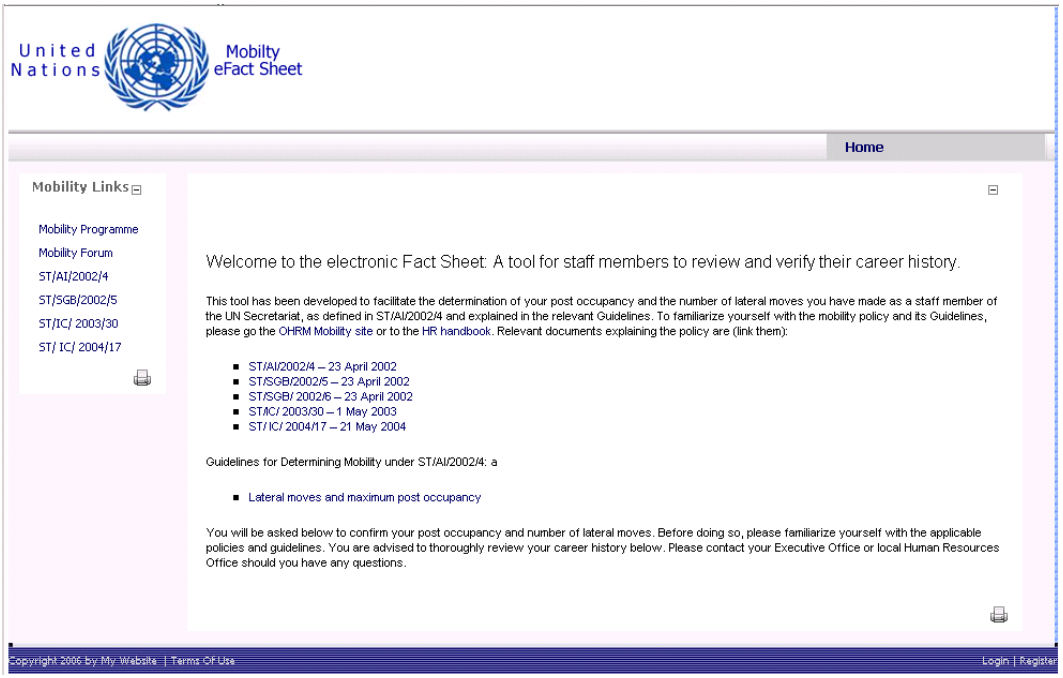
Section

1

Accessing your Mobility eFact Sheet online

This section will explain how to access the eFact Sheet website and your Mobility Fact Sheet online

The website for eFact Sheet may be accessed through the following URL: **http://hrits.un.org/eFactSheet**.

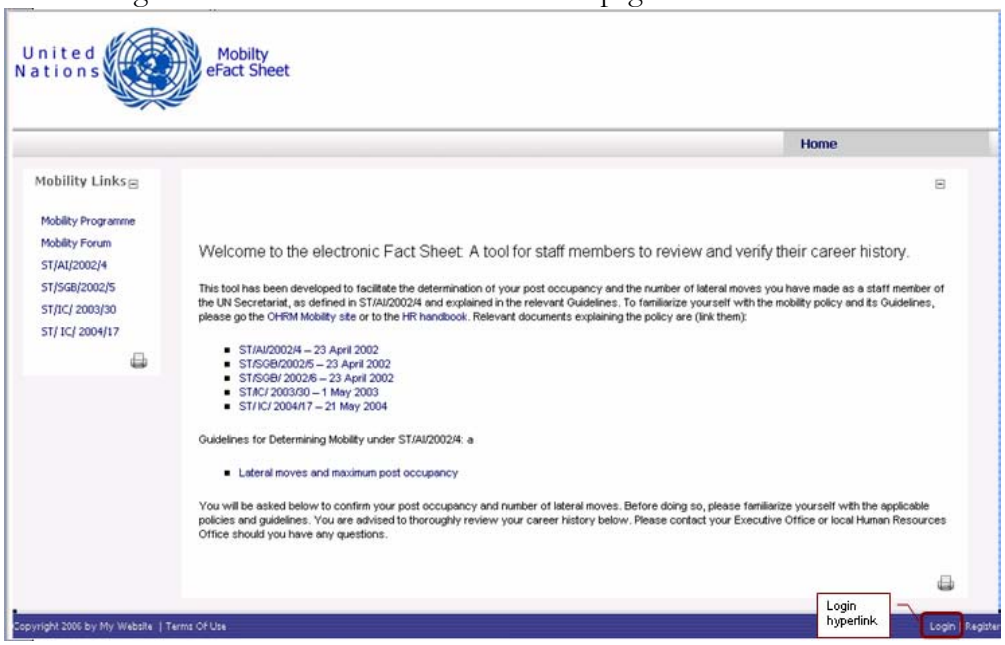


As seen in the Welcome page, the purpose of the electronic Fact Sheet is to enable the staff member to see their post occupancy, lateral moves and to familiarize themselves with the mobility policy and guidelines. Links to the released ST/ICs and ST/AIs are also available at the Welcome page.

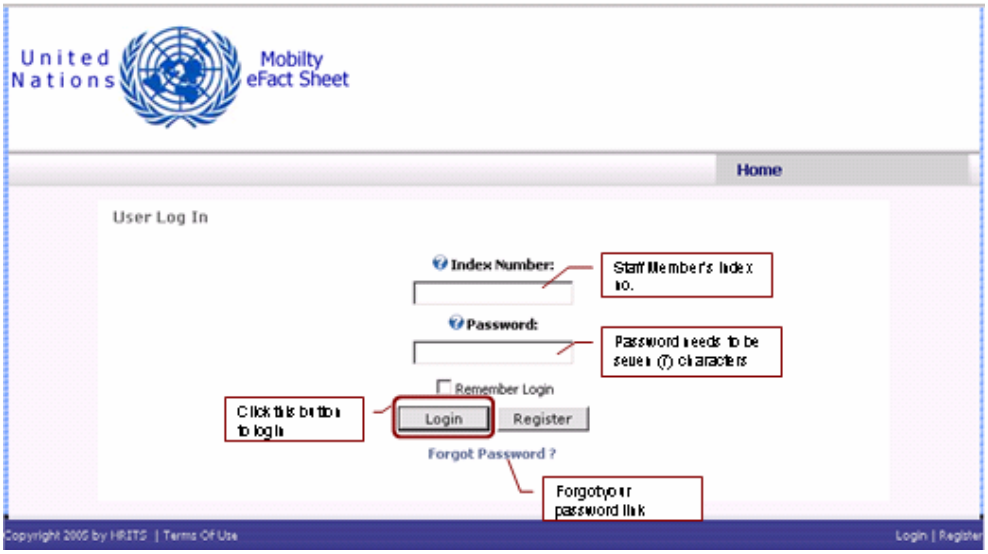
Logging into eFact Sheet

Provided that the staff member already has their username and password, they can immediately login into their online mobility Fact Sheet. Staff members may register on their own, details on how to register into eFact Sheet is covered in **Section 3, Online Registration**.

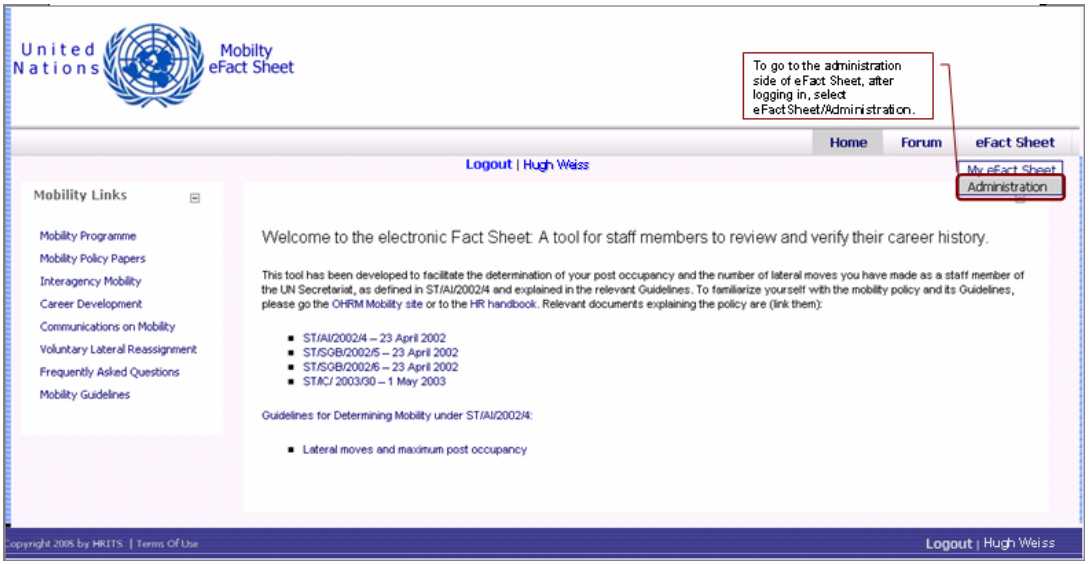
Click on the login button located at the bottom of the page



1. Provide your index number and password. Note that the password needs to be seven characters of your choice. A Forgot Password link is also provided in case the staff member has forgotten their password. Passwords are sent to staff member by automatic email.



2. Once the staff member has logged in, they will see in the upper right hand corner of the screen the link **eFact Sheet**. To go to the Administration module, select *eFact Sheet/Administration.*



Once inside the Admin module, you will see the cases in the Admin inbox. From here you may select the cases that you are either working on or needs to work on.

2

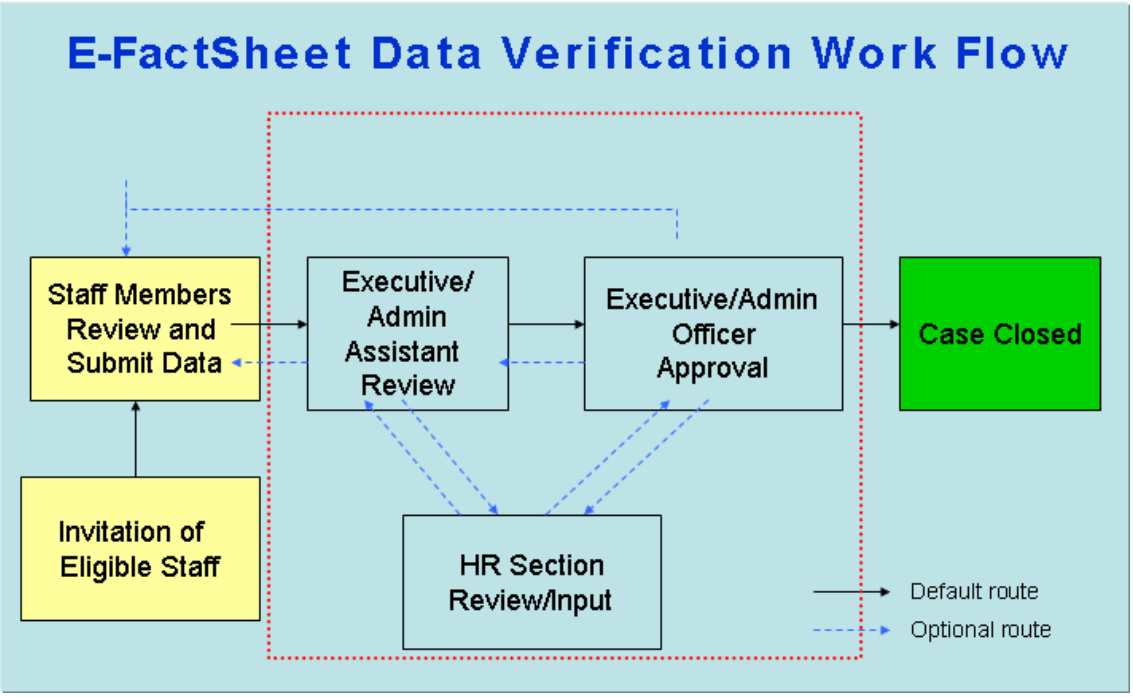
Administration Module

There are three roles assigned to staff members who will be addressing cases in the HR Administration module.

1. **Executive/Admin Assistant.** Generally will receive the staff member's case and will try to validate or address the concern initially.
2. **Executive/Admin Officer.** Approves and closes the cases raised by staff members. Cases that are complicated may also be escalated to the Executive/Admin Officer.
3. **HR Section (Review/Input).** Liaise and address cases in coordination with the Executive/Admin Assistants and Officers.

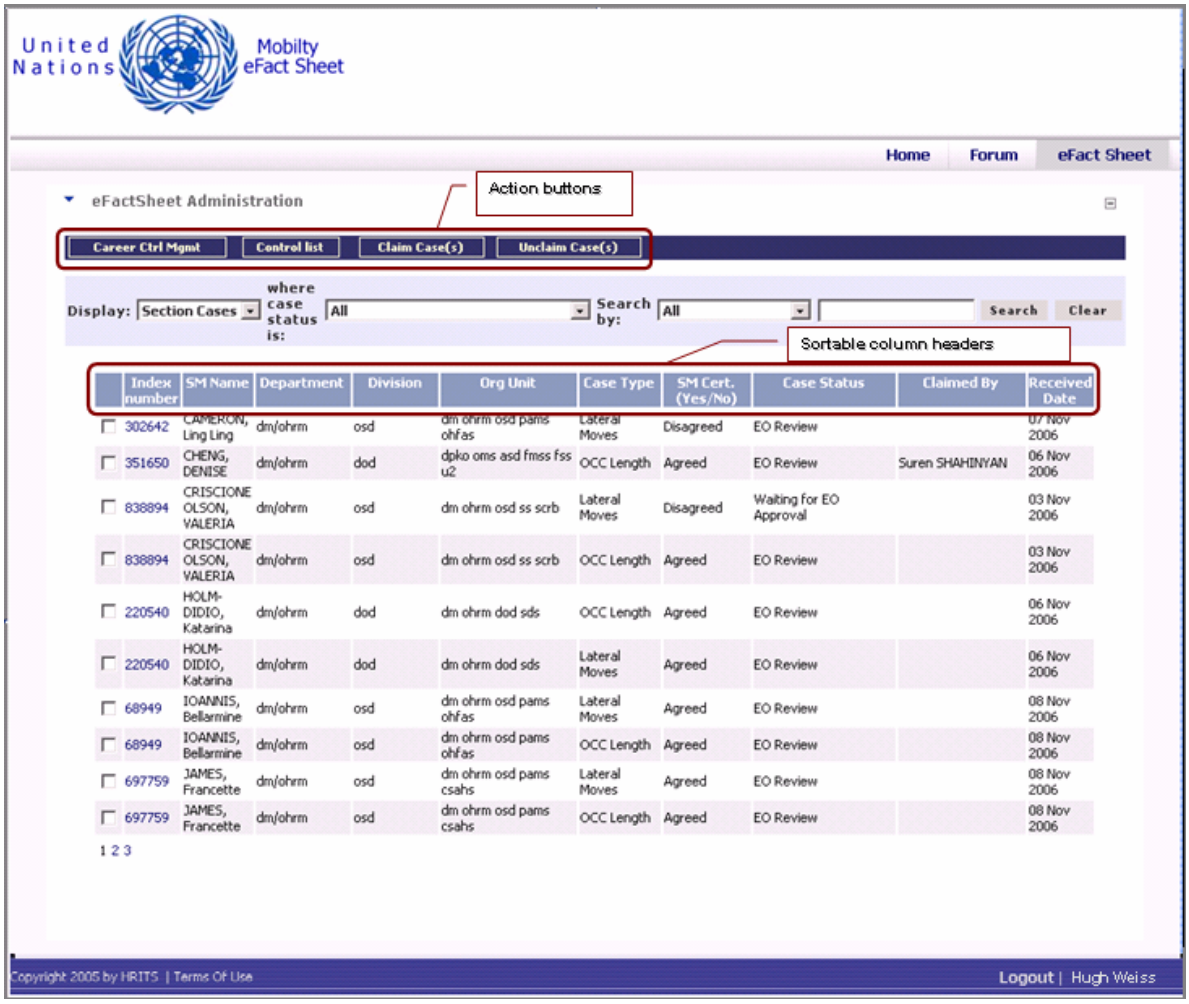
Note: Any case may go back and forth between the staff member, Executive/Admin Office and HR Section until the pending issue raised by the staff member has been resolved and the case may be closed.

eFact Sheet Workflow



HR Admin Module Screen

From the HR Admin module screen, the member of the EO or HR Section may start working on the cases that have either been assigned to them or claimed by them.



- **Career Control Mgmt**
- **Control List**
- **Claim Case(s)**
- **Unclaim Case(s)**

Career Control Mgmt

Clicking this button brings you to a screen that lists down the different types of Personnel Action that a staff member may/can have in IMIS. It also indicates whether the PA affects the staff member's mobility based on the indicators under Movement Type, Career Indicator and Workflow Path.

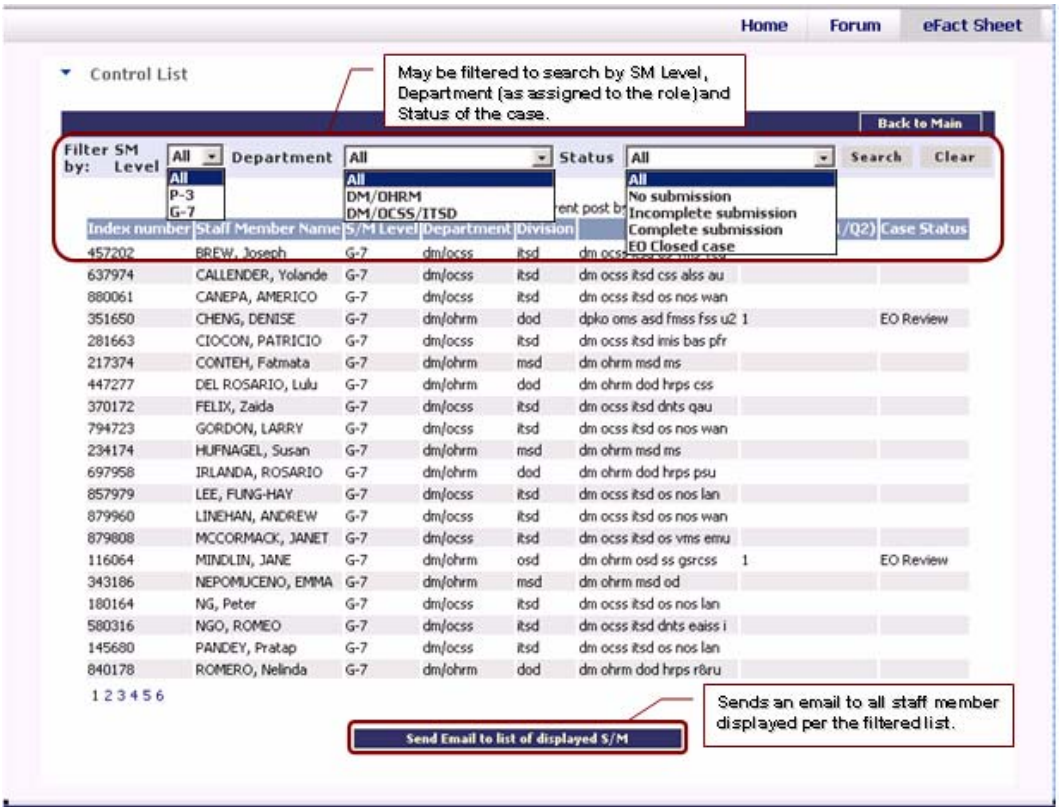
Home Forum eFact Sheet

Career Control Management

PersonnelActionType	ActionDescr	MovementType	CareerInd	WorkflowPath
HHMD	Modify Household Income			
HHMM	Modify Dependent	0	0	
MOBD	Discontinue Mobility			
MOBG	Grant Mobility		1	
MOBS	Modify Mobility Status			
PAMI	Record Detail During Assignment/Loan	2	1	
PAMM	Modify Detail During Assignment/Loan Period	2	1	
PANA	Record Assignment	2	1	
PANB	Transfer between departments	1	1	
PANC	Establish Post Incumbency		1	
PAND	Return from secondment	2	1	
PANE	Record Secondment	2	1	
PANG	Return From Assignment	2	1	
PANI	Record Detail Assignment	2	1	
PANL	Modify Loan Period	2	1	
PANM	Modify Detail Period	2	1	
PANN	Return From Loan	2	1	
PANO	Record Loan	2	1	
PANP	Extension of	2	1	

Control List

Under the Control List, staff members participating in the mobility programme may be filtered by Level, Department and Status type.



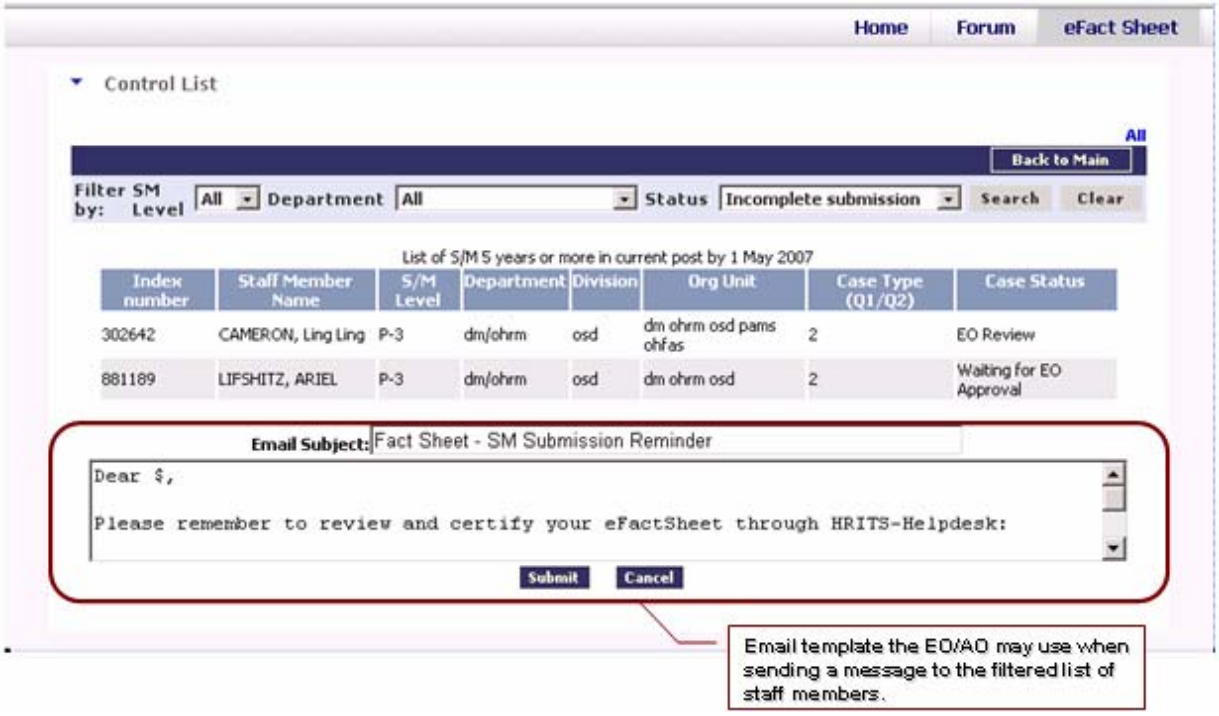
At this stage, the Executive/Admin Officer (EO/AO) has the capability send an email to filtered list of staff members as needed.

When a follow-up email needs to be sent out to all staff members with case status *Incomplete Submission*, after filtering the list of staff members, the EO/AO can click on the **Send Email to list of displayed S/M**, to send an email to everyone in the control list.

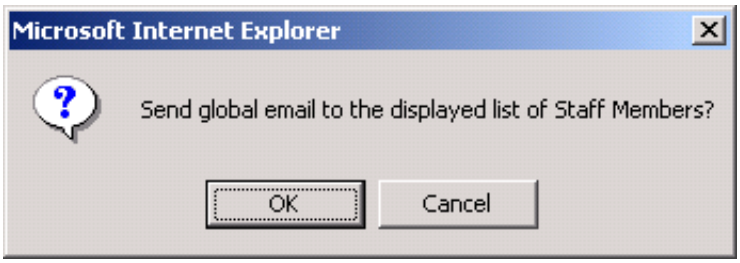
An email template then appears that the EO/AO may use and a confirmation pop up will appear after clicking the *Submit button*.

Sending a Global email from the Control List

1. Filter the staff members that need to be sent an email message or reminder by choosing from the filter fields.
2. Edit/modify both the *Email Subject* field and the *message/content box* field as necessary. But **take note not to change the Dear $** in the message/content box, this personalizes the message being sent out, i.e., "Dear John Smith," and the **URL:#** also as this displays the eFactSheet website address (http://hrits.un.org/efactsheet).

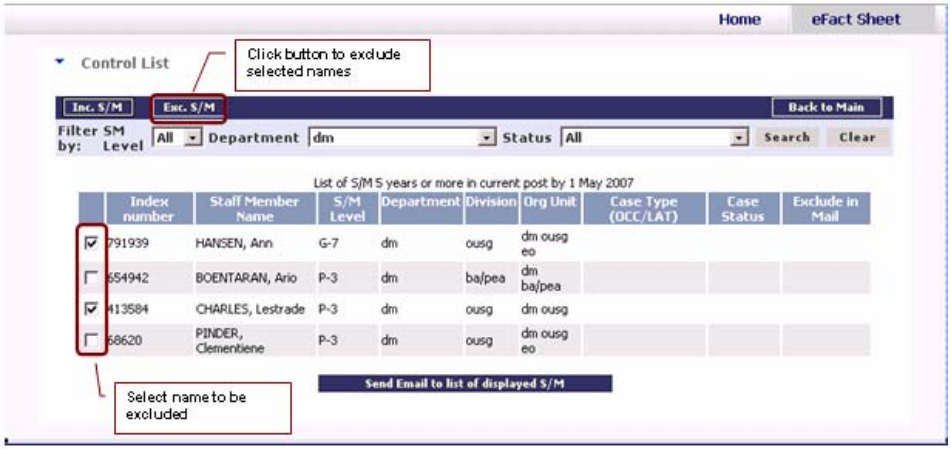


Click on the Submit button to send the eMail message. A pop message will come up to verify that you really intend to send the global email. Click OK to send the eMail message out.

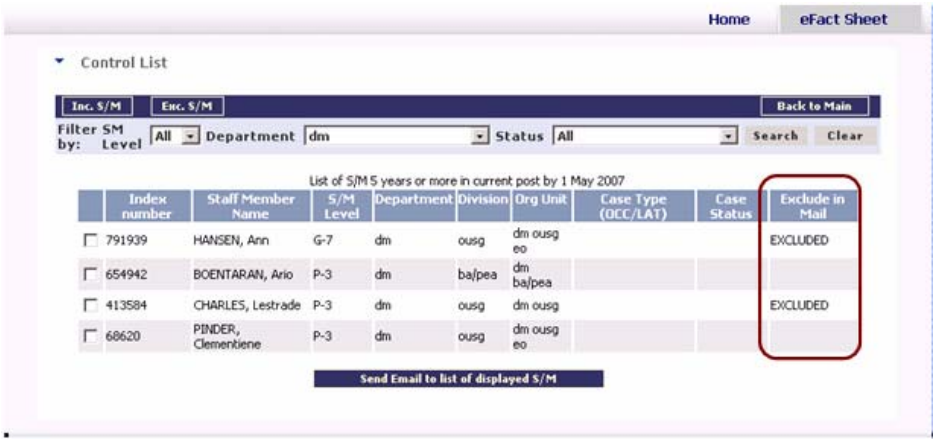


Excluding names from the filtered list

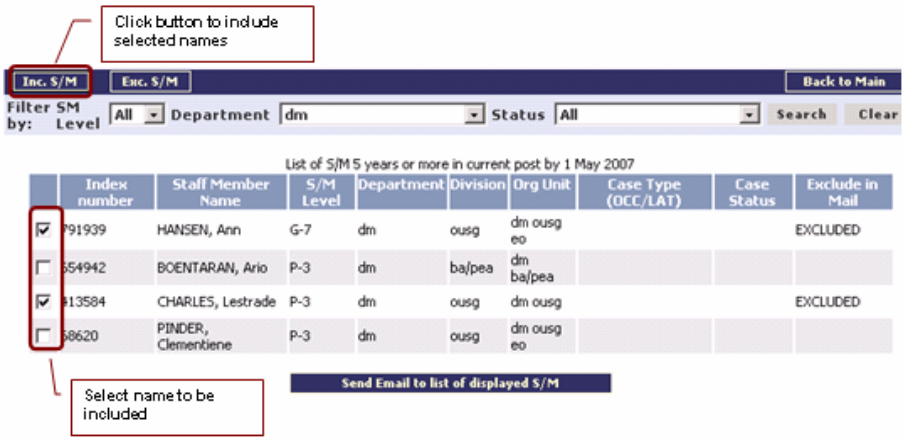
1. If there's any need to remove names from the filtered list or the general list to which a global email message is to be sent, the EO will need to select the names and click on the *Exc. S/M button*.



2. Names that have been excluded from the mailing list will have the indicator EXCLUDED in the last column in the Control List.



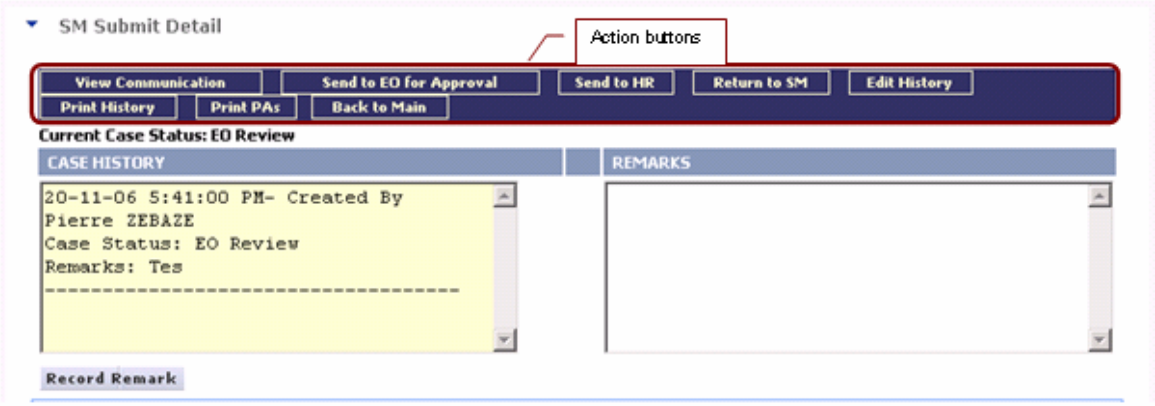
3. To include the names back, simply select the names again and click the *Inc. S/M button*.



Screen Views for EO/AO and HR Section

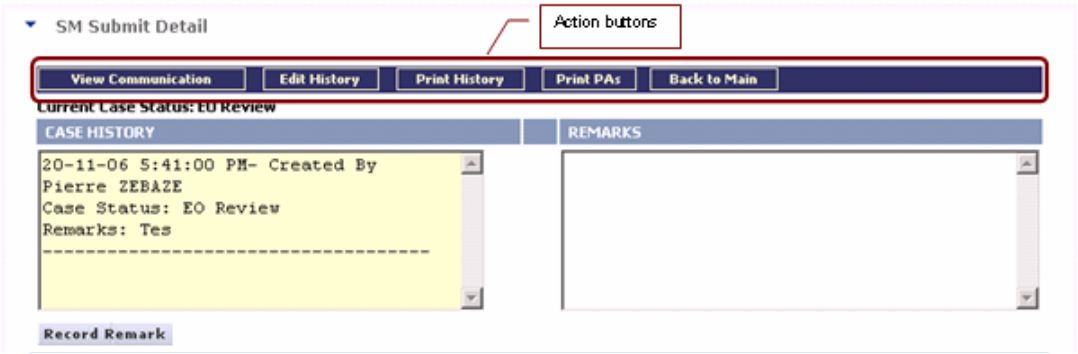
Executive/Admin Assistant and Officer

Both roles see the same screen and action buttons. Note that the Executive/Admin Officer role may act as both Assistant and Officer.



HR Section

Both roles see the same screen and action buttons. Note that the Executive/Admin Officer role may act as both Assistant and Officer.



Cases

Claiming Case(s)

Supports the idea of the honor system where an EO/AO, their assistants or HR Section can claim cases they want to work on. Note that claimed cases may still be worked on by other EO/AO or the HR Section, not just those who originally claimed it.

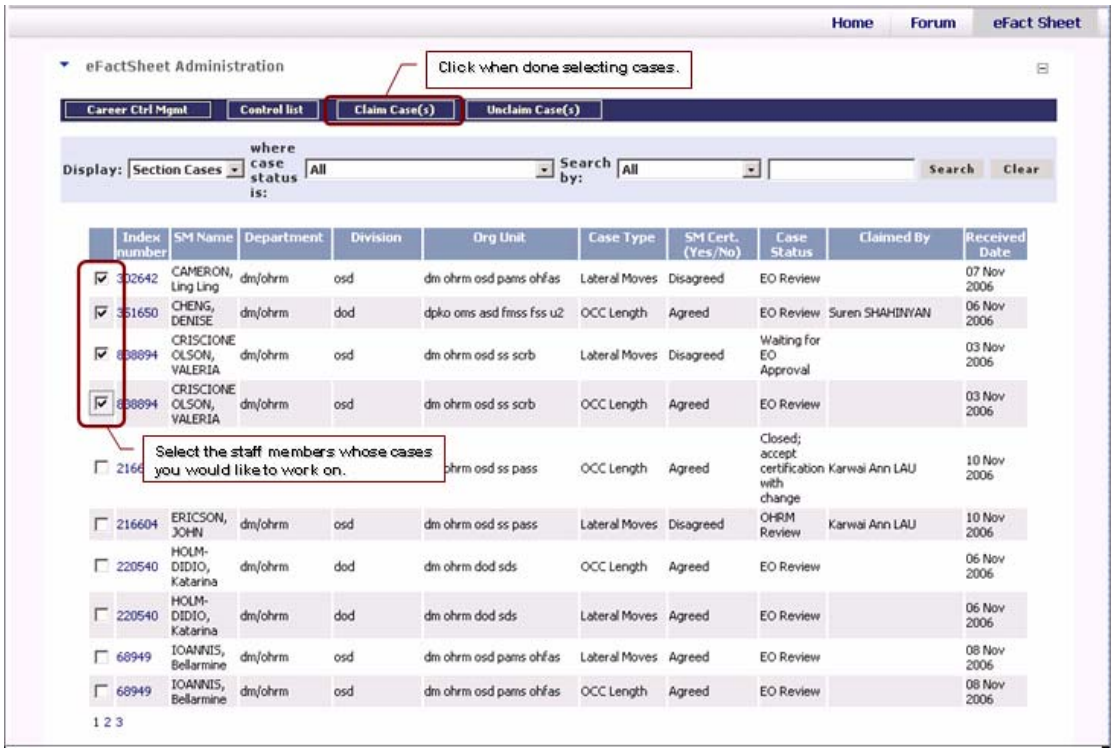
Note that for staff members in the Professional category would normally have two (2) cases with case type:

- Lateral Moves
- OCC Length

Staff members in the General Service category would only have one (1) case type, and that would be the OCC Length.

To select and claim cases

1. Select the staff member by clicking on the check box beside the staff member's name.
2. Click on the *Claim Case(s)* button to claim the marked cases.



To search for claimed cases

1. Select My Cases, under the Display field.
2. Click on the Search button. The table will then filter to show only claimed cases.

eFactSheet Administration

Career Ctrl Mgmt | Control list | Claim Case(s) | Unclaim Case(s)

Display: My Cases where case status is: All Search All Search Clear

Filters only to claimed cases.

	Index number	SM Name	Department	Division	Org Unit	Case Type	SM Cert. (Yes/No)	Case Status	Claimed By	Received Date
☐	302642	CAMERON, Ling Ling	dm/ohrm	osd	dm ohrm osd pams ohfas	Lateral Moves	Disagreed	EO Review	Karwai Ann LAU	07 Nov 2006
☐	351650	CHENG, DENISE	dm/ohrm	dod	dpko oms asd fmss fss u2	OCC Length	Agreed	EO Review	Karwai Ann LAU	06 Nov 2006
☐	838894	CRISCIONE OLSON, VALERIA	dm/ohrm	osd	dm ohrm osd ss scrb	Lateral Moves	Disagreed	Waiting for EO Approval	Karwai Ann LAU	03 Nov 2006
☐	838894	CRISCIONE OLSON, VALERIA	dm/ohrm	osd	dm ohrm osd ss scrb	OCC Length	Agreed	EO Review	Karwai Ann LAU	03 Nov 2006

When working on a case,

1. Click on the staff member's name. Note the column SM Cert.
2. The SM Submit detail screen comes up. From this screen the EO/AO, their Assistants or the HR staff working on the case will see the status of the case and the response received from the staff member. The HR staff can also respond or communicate with the staff member Case Remarks window.

SM Submit Detail

Remarks entered

View Communication | Send to EO for Approval | Send to HR | Return to SM | Edit History | Print History | Print PAs | Back to Main

Current Case Status: EO Review

CASE HISTORY

```
14-11-06 11:38:00 AM- Created By
Karwai Ann LAU
Case Status: EO Review
Remarks: SM PA being reviewed.
-----------------------------------
```

Recorded remarks.

REMARKS

```
Looking for succeeding PAs.
```

Remarks to be recorded are entered in this area.

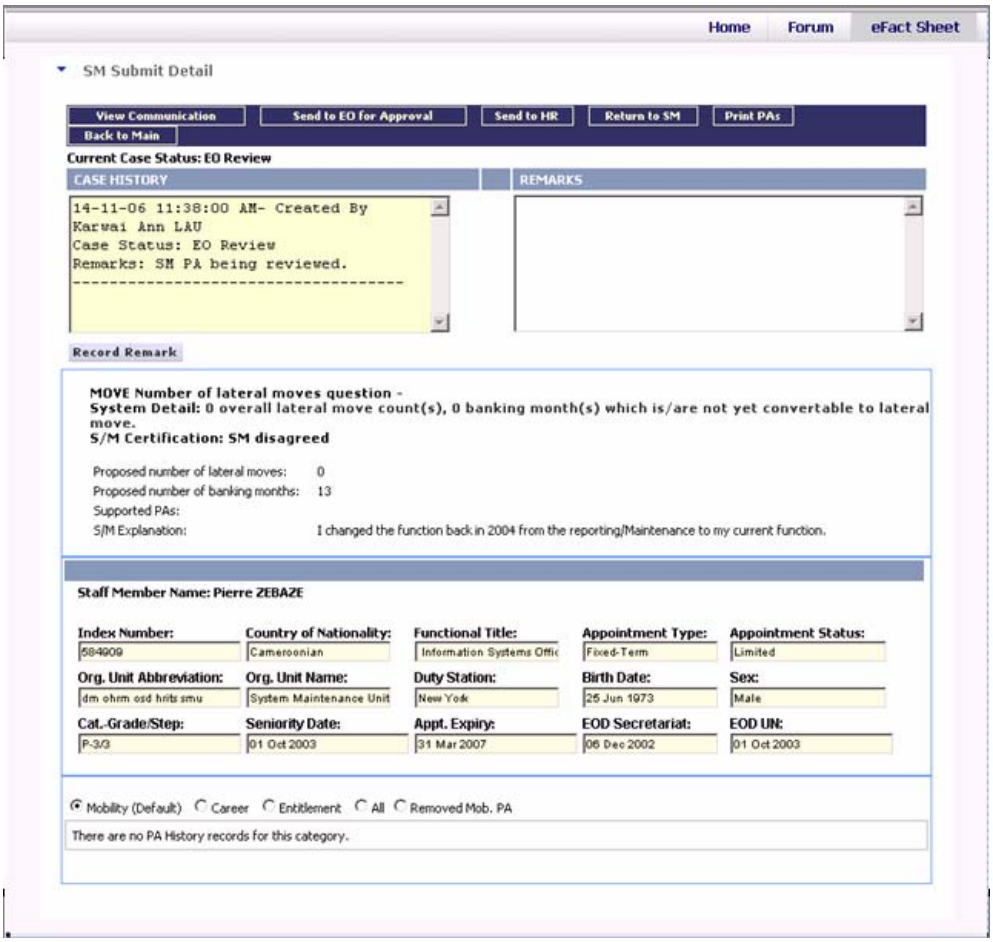
Record Remark

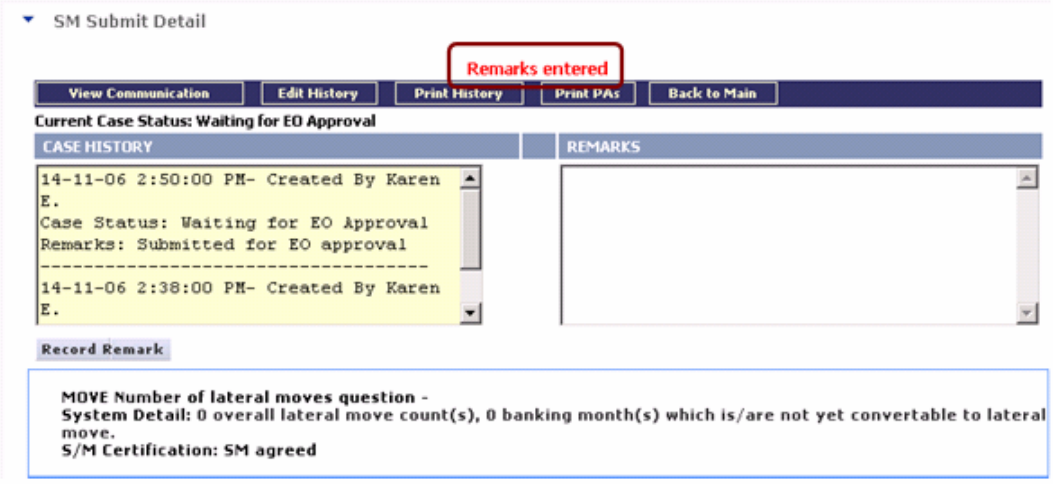
Click button to record entered remarks.

MOVE Number of lateral moves question -
System Detail: 0 overall lateral move count(s), 0 banking month(s) which is/are not yet convertable to lateral move.
S/M Certification: SM disagreed

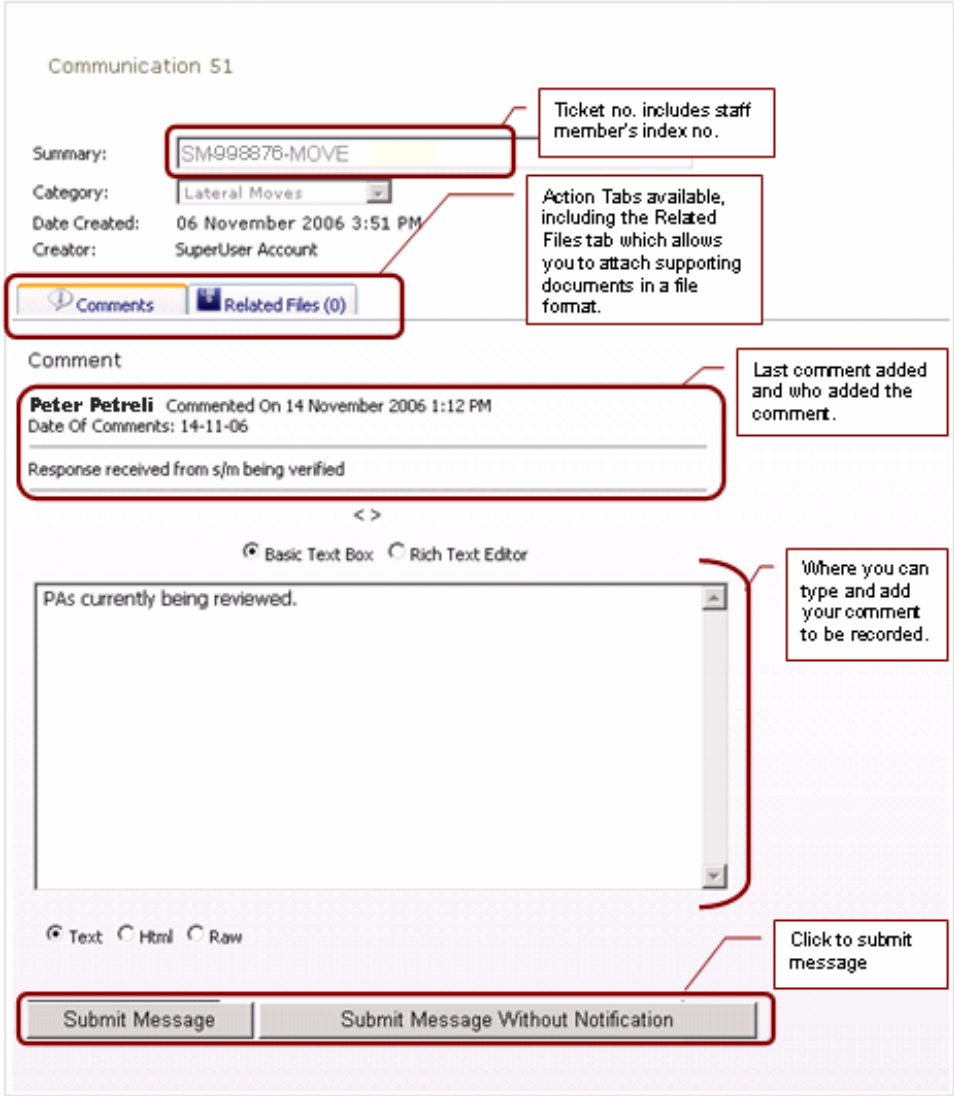
Proposed number of lateral moves: 0
Proposed number of banking months: 13
Supported PAs:
S/M Explanation: I changed the function back in 2004 from the reporting/Maintenance to my current function.

3. To enter remarks, type them at the *Remarks* window and then click on the *Record Remark* button. The words Remarks Entered will appear at the top of the page in red.





4. Similar with the staff member, the HR staff can also communicate with them via the Communication module by selecting View Communication.



Unclaim Case(s)

If the EO/AO, their assistants and HR Section decides to unclaim a case, they only need to select the cases they want to unclaim and click on the *Unclaim* button.

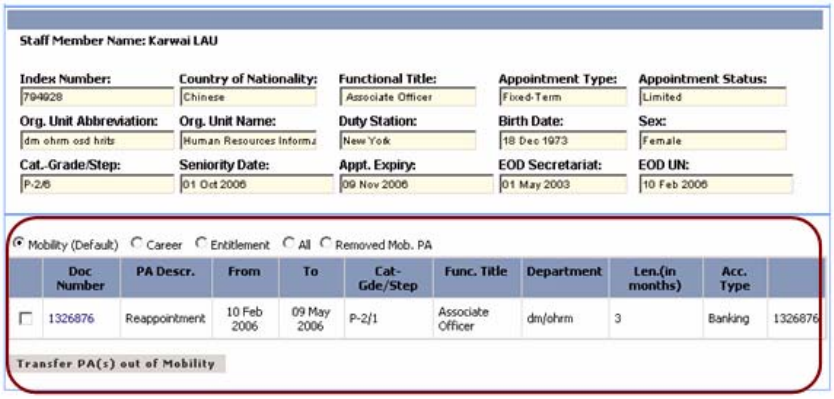
Cases may be unclaimed either because the responsible person will not be available to complete the case and/or the case(s) needs to passed on to another, or work load dictates that some cases needs to be unclaimed to be worked on by someone else.

Staff Member PAs

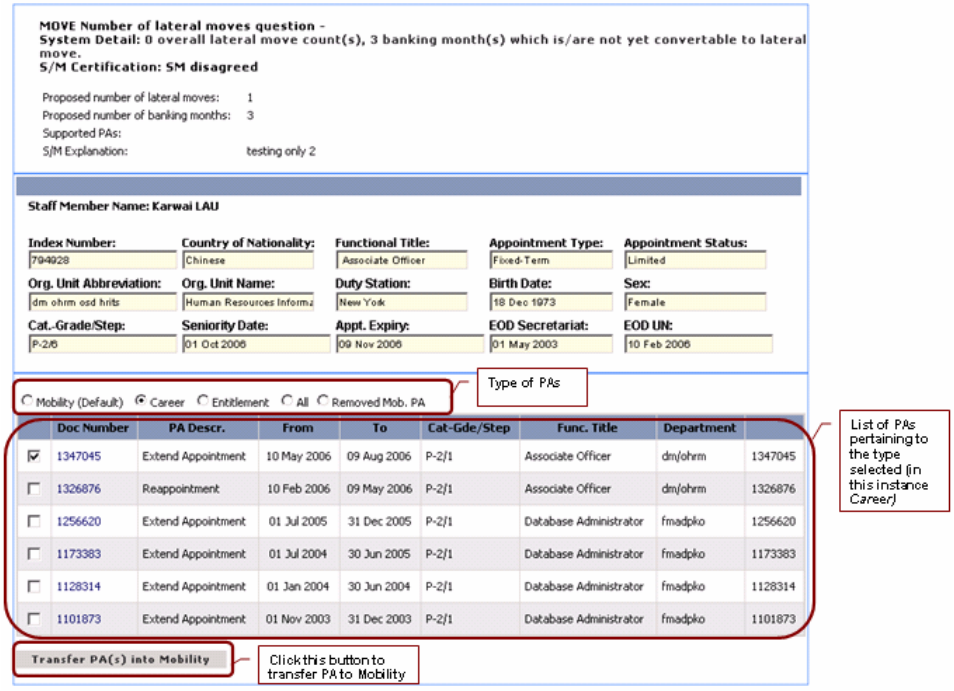
Staff Members who disagree on any of the information shown in their fact sheet may respond with corresponding Personnel Action (PA). The list of staff member's PAs are shown at the bottom of the staff member's screen in the EO/EOA view. From this view, the EO/EOA may transfer the PA into the staff members list of Mobility PAs.

The added PA may then add to either the Occupancy Length or Lateral Moves (including the Banking months).

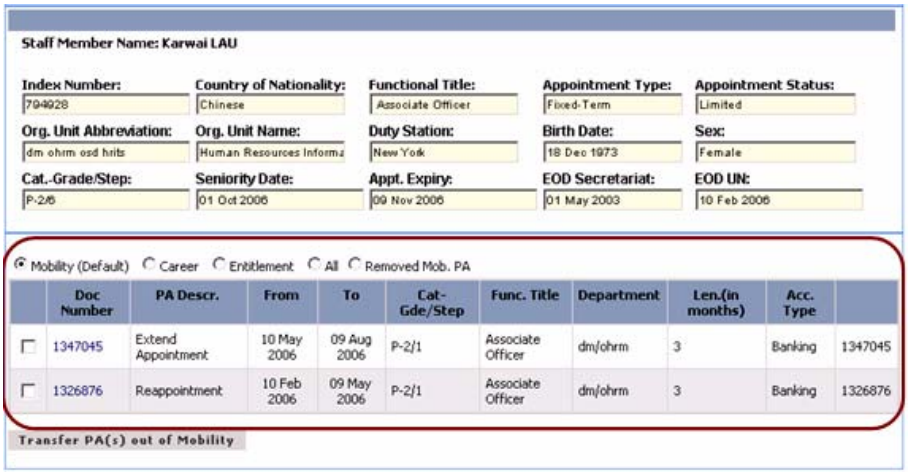
1. By default you see the staff member's case with PA type set to Mobility.



2. You may then select PA type Career to see the list of PAs pertaining to the staff member's career and from this screen transfer PAs to the list of staff member's PAs that counts for Mobility by clicking on the Transfer PA(s) into Mobility.

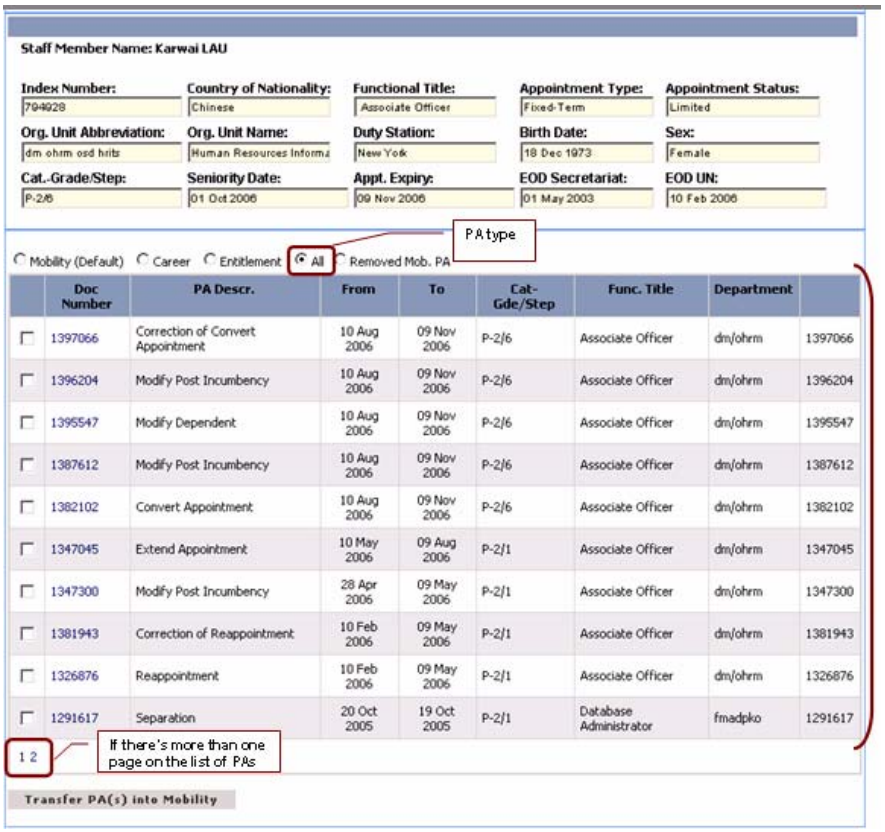


3. Once the PA to be transferred to count for Mobility is selected, click on the *Transfer PA(s) into Mobility button* and the PA will then be reflected towards the staff member's mobility and in the list of the staff member's Mobility PAs.



Note that the button to transfer PAs into the list of Mobility PAs acts as a toggle, so if a PA is transferred by mistake, it can always be transferred out of the list of Mobility PA by selecting it and clicking on the *Transfer PA(s) out of Mobility*.

4. To see any other PA type or all the PAs in the staff member's records, simply select the PA type and the view of PAs will adjust accordingly.

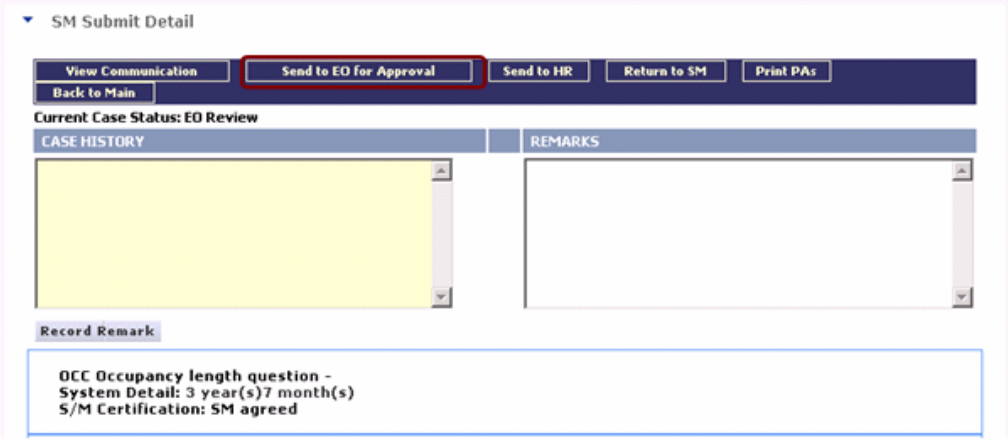


Closing Case(s)

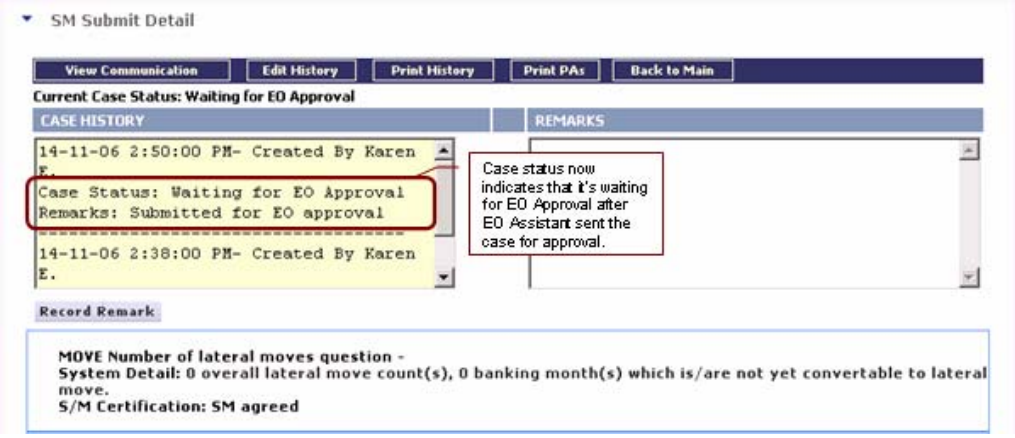
To Executive/Admin Officer has the right to close a case once all issues pending on the staff member has been resolved.

When the case is with the Executive/Admin Assistant:

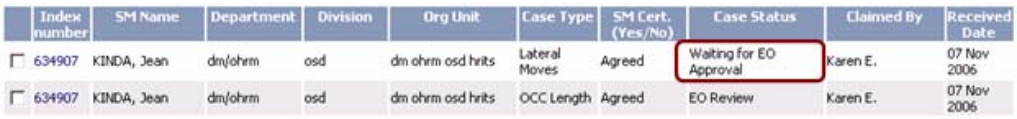
1. If the case is with the Executive/Admin Assistant, the EA/AA selects the case and clicks on the *Send to EO for Approval* button.



2. After the *Send to EO for Approval* button is clicked, a remark is recorded under Case History.



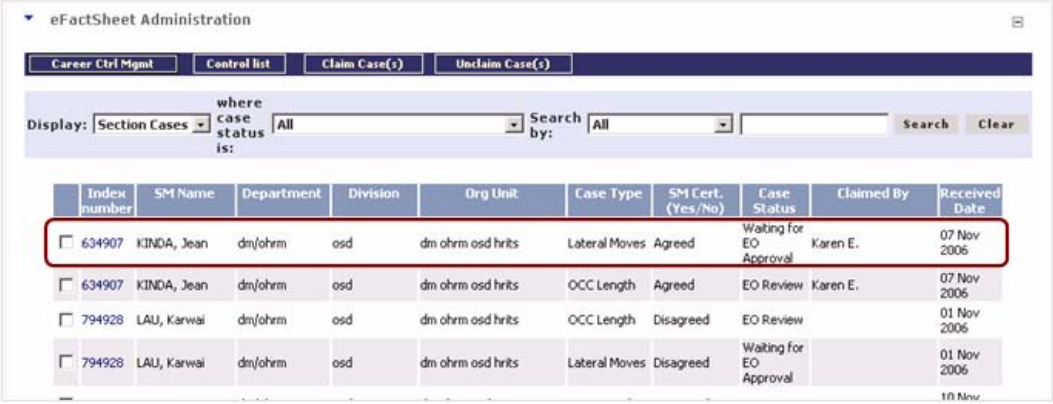
3. And the status in the list will change to *Waiting for EO Approval.*



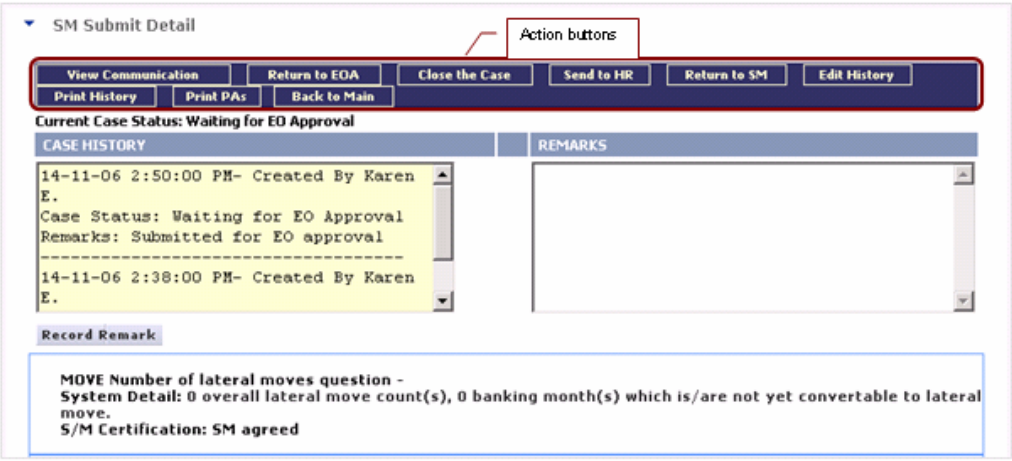
	Index number	SM Name	Department	Division	Org Unit	Case Type	SM Cert. (Yes/No)	Case Status	Claimed By	Received Date
☐	634907	KINDA, Jean	dm/ohrm	osd	dm ohrm osd hrits	Lateral Moves	Agreed	Waiting for EO Approval	Karen E.	07 Nov 2006
☐	634907	KINDA, Jean	dm/ohrm	osd	dm ohrm osd hrits	OCC Length	Agreed	EO Review	Karen E.	07 Nov 2006

To close a case:

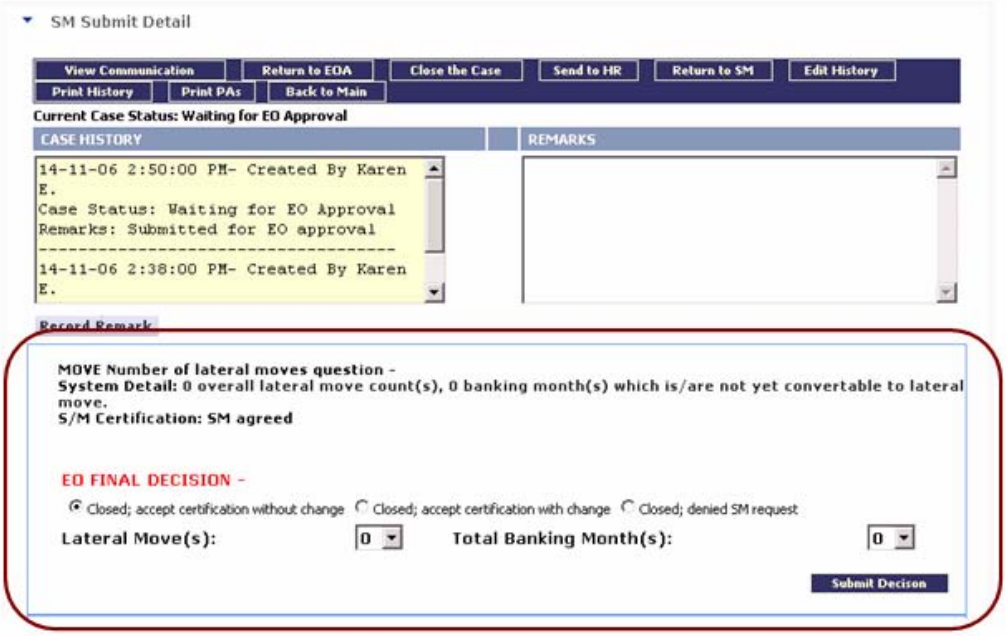
1. The EO/AO selects the staff member's index no. either from the list of claimed cases or from the list of cases.



2. The EO/AO at this stage verifies the case and decides whether the case may be closed or if it needs to be returned back to the EA for further review. The EO/AO simply needs to click on the corresponding action button.

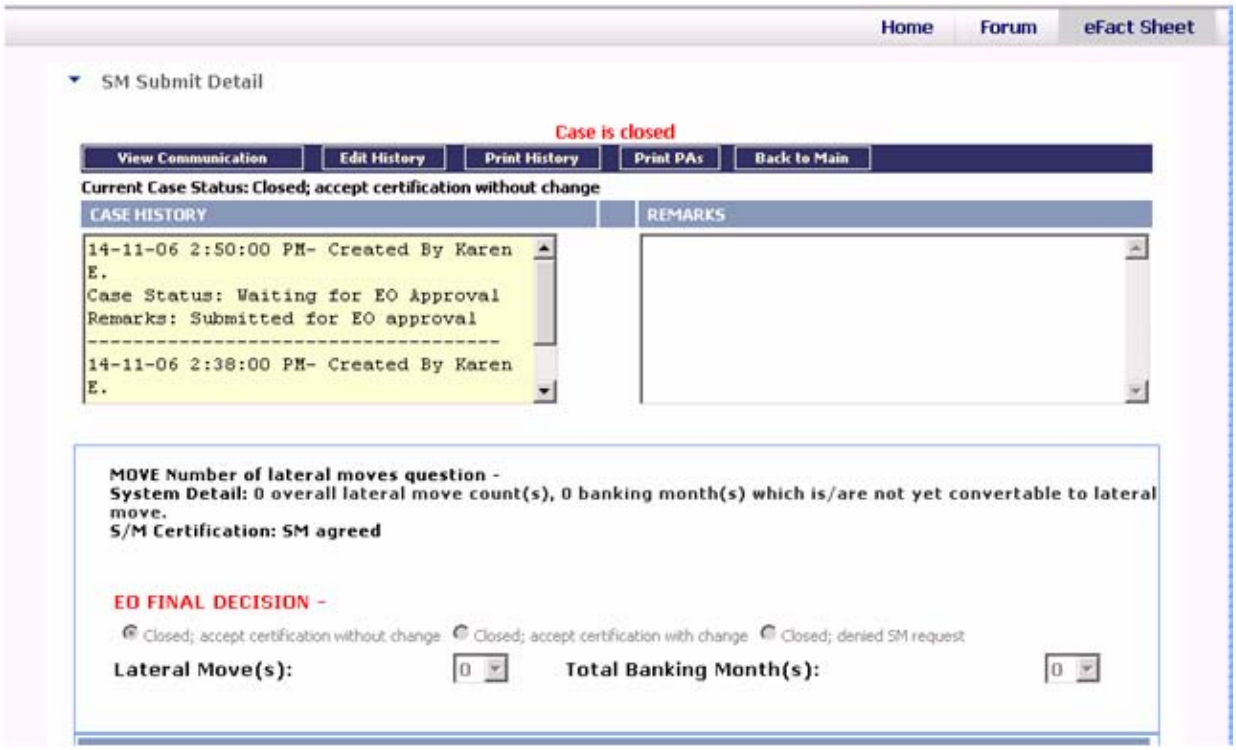


3. Once the EO clicks on the Close the Case button, a confirmation screen and button appears to verify that the decision to close the case is final. At this point, before selecting the Submit Decision button, the EO/AO also selects whether the case is being closed with change, without change or closed denying the s/ms request to change. All these options are presented and selectable by radio buttons.



4. The EO then selects the Submit Decision button and a confirmation box appears.

Once the EO clicks on the OK button, the case is closed. A remark is noted in red at the top of the page and at the Case Status column in the inbox and the Control List area.



Note If the staff member is in the Professional category, the two cases are closed separately.

EO Final Decision

There are three options on how a case may be closed:

1. **Closed, accept certification without change.** This is an option where the staff member promptly certifies the information in his/her fact sheet. And where the EO closes the cases as there's no need for further correction to the staff member's relevant mobility information.

2. **Closed, accept certification with change.** This is an option where the staff member needs something corrected or verified before certifying their fact sheet. Where either the Executive Office or both the Executive Office and HR Section agreed with the staff member and accepted the change before closing the case. And where agreed upon change is reflected by the EO towards the staff member's relevant mobility information when the case is closed. (A change is reflected in the EO decision and where the information is not the same as the information originally calculated by the system.)

3. **Closed, denied SM request.** This is an option where the staff member needs something corrected or verified before certifying their fact sheet. And where either the Executive Office or both the Executive Office and HR Section disagreed with the staff member and closed the case without any change to the suggested calculated mobility information in the system.

Note

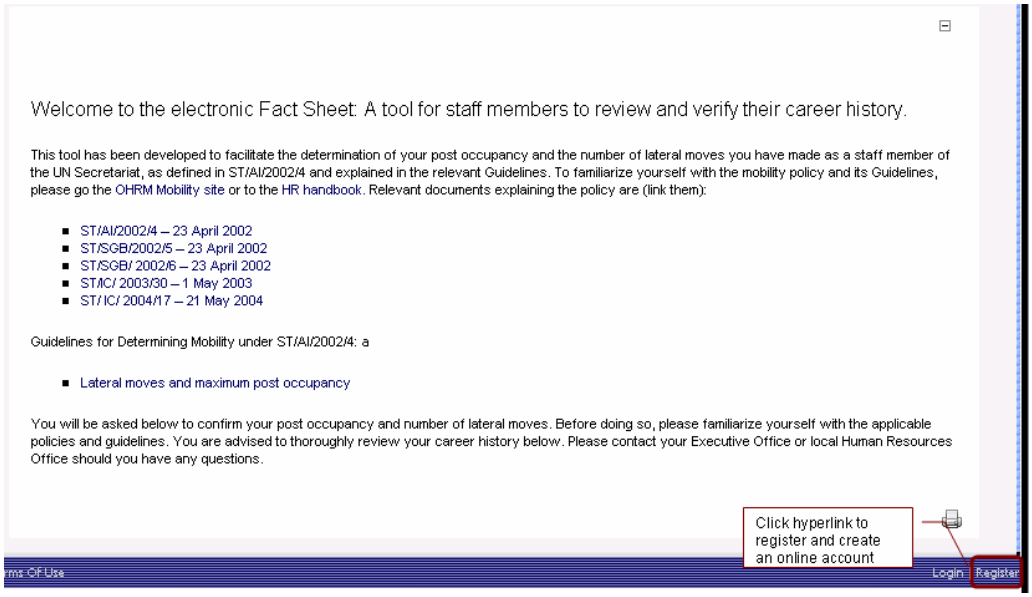
When a case is closed with the EO's final decision, the number of banking months for the staff member is indicated. **Banking** is the amount of moves that the staff member has participated in but cannot be considered as one lateral move because the amount of time the staff member stayed in the post is less than the specified number of years. The banked moves may be added together to complete one lateral move. Note that they are displayed in months and collected lateral moves.

Section 3

Registering online

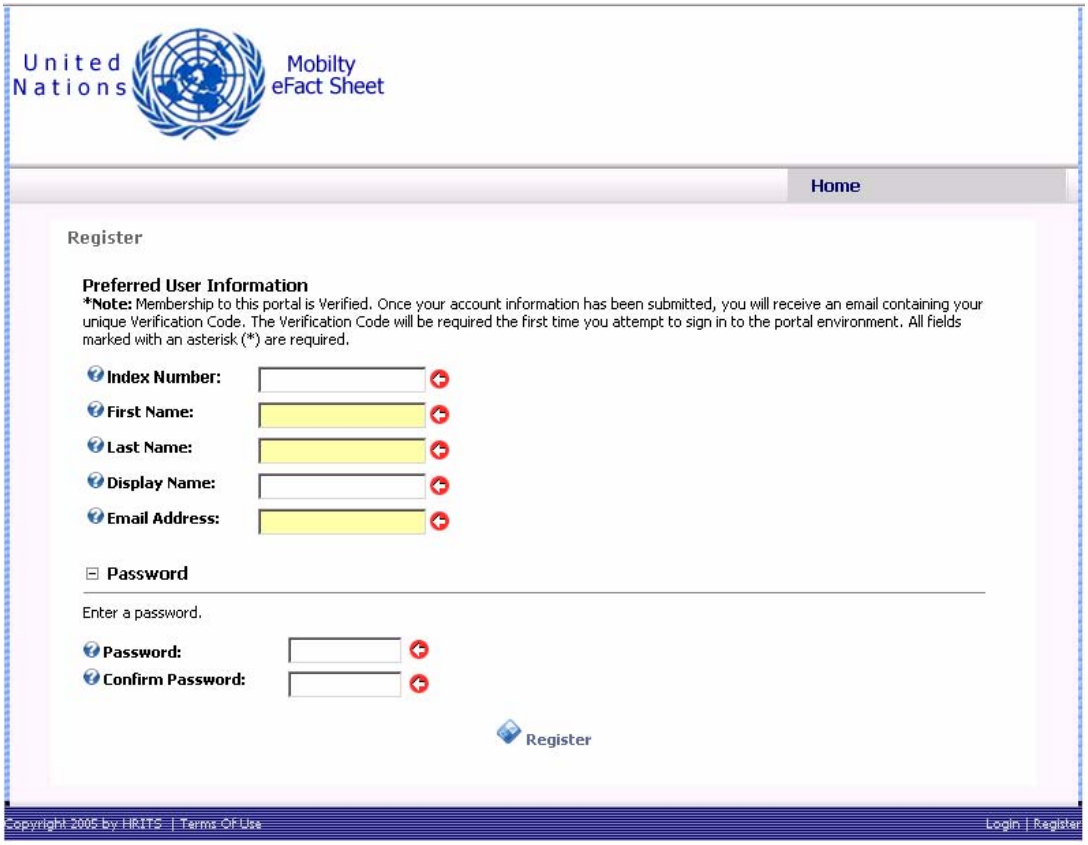
Staff members who would like to view their online Fact Sheet can do so by registering and creating an online account. Once the staff member has completed this, the system administrator (HRITS) will get the notification, they will then verify the registration and authorize the account creation request.

1. Click on the Register hyperlink at the bottom of the Welcome screen.

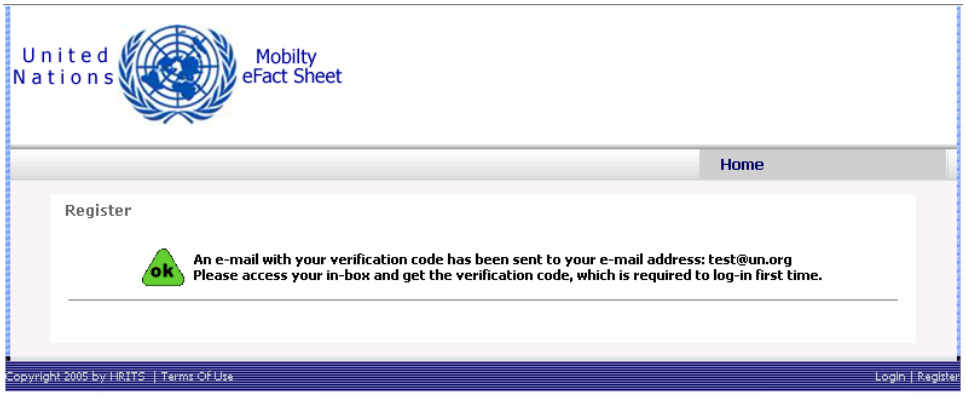


2. The User Registration screen comes up. Provide the following:

   a. Index Number
   b. First name
   c. Last name
   d. eMail address
   e. Seven character password



3. Click on the Register button. You will then see a confirmation page.



Again, note that the system administrator will still verify and authorize your account registration. Once account has been authorized, you will get a notification by email.

Executive and Admin Officer/Assistants and HR Section roles

A list of staff members who will be given the roles of EO/AO, EO/AO Assistants and HR Section are pre-registered by HRITS.

1. A list of staff members is received from the different departments with specified roles.

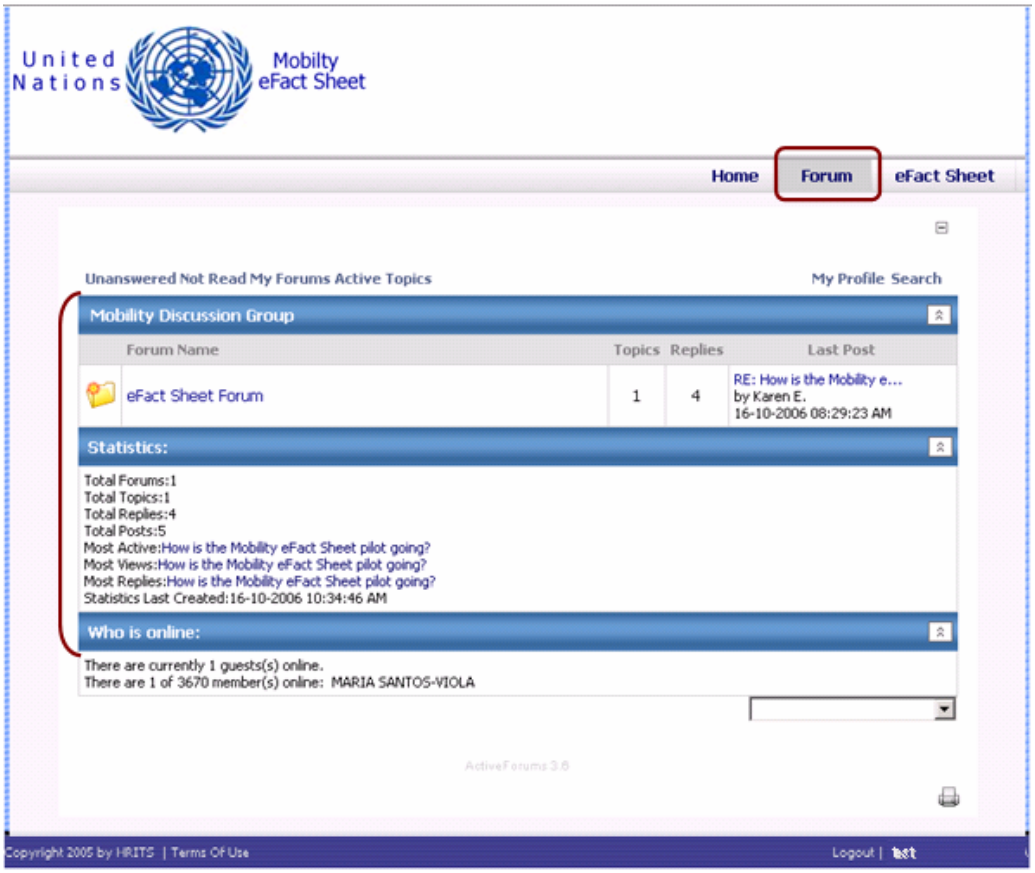
2. HRITS registers and assigns the roles then notifies the staff members that their accounts with the EO/AO, EO/AO Assistants or HR Section roles are already active.

Section

4

Forum

The Forum is a feature of eFact Sheet that allows staff members to discuss and monitor mobility discussions online, similar to a bulletin board.

It has three sections;

- **Mobility Discussion Group**, where staff members can discuss and communicate with one another
- **Statistics**, which acts as a discussion log
- **Who is online**, shows the staff member who else is logged in and they can start an online discussion with.