

## Vendor Creation and Banking process – Standard Operating Procedure

<b>Responsible Unit</b>	Volunteer Solutions Section (VSS)
<b>Focal point</b>	Volunteer Solutions Section (VSS)
<b>Effective from</b>	1 Oct 2021
<b>Applicability</b>	All volunteer modalities

1. [ATLAS HCM User Guide](#)
  2. [Unified Conditions of Service](#)
  3. [Vendor creation and banking entry process in UVP](#)
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- A. **Volunteer Vendor Bank Information Creation in ATLAS Finance (UNV10 Business Unit) IUNV ONLY**
  - B. **Banking info in Atlas HCM at hiring (**
  - C. **UN Volunteer self-service updates during assignment and repatriation** (including when IUNVs open local bank account)
  - D. **Monthly Statistical Reports (IUNV and NUNV)**

	Responsible party or person	Process step	Description	Documents	System role	Comments
<b>A. Volunteer Vendor Bank Information Creation in ATLAS Finance (UNV10 Business Unit) IUNV/NUNV</b> Vendor profiles for NUNVs should be created in exceptional cases only. This can be triggered manually in UVP by Operations Associates.						
1.	Candidate	Enter bank details in UVP	When offer is accepted, complete the task 'Add bank information'. Enter bank details in UVP under 'My banking' and submit.		Candidate	<b>Note:</b> Upload proof of Banking or other necessary information required for certain exceptional countries where it is needed to process payments (e.g. Jordan, Brazil)

						Guide for how to enter banking information: <a href="#">Interactive version</a> , <a href="#">web-page version</a>
a.	OA	Request vendor profile for NUNV (exceptional)	For exceptional cases when NUNV vendor creation and update is required, OA can submit a request from candidate profile - candidate banking. Edit banking information. Click submit. Select Atlas Finance from dropdown.			<p>This applies if NUNV needs to receive payment by vouchers in exceptional cases.</p> <p>Vendor creation not related to volunteers entitlements should not be processed through UVP and it should be through UNDP country offices to GSSU KL directly.</p> <p>GSSU KL will create the vendor for the mission travel under the local BU (like; AFG10 or FIJI10 or LBN10)</p>
2.	System (UVP)	Notification	Send automatic notification email to GSSU and create task on GSSU dashboard		System	
3.	GSSU	Review banking task in UVP	Open task. Review bank information in UVP.		GSSU user	

a.	GSSU	Request for clarification/correction	<p>In case clarification/correction is needed:</p> <p>Contact candidate using 'request edit' function in UVP (sends automated email to candidate). Or directly by email if needed (e.g. to request proof of banking).</p> <p>If no response from candidate:</p> <ul style="list-style-type: none"> <li>-Send a reminder after 24 hours and final reminder 48 hours. If no response within 96 hours, email OA at VSC and mark case as pending. After sending an email to OA, GSSU will close the case after 48 hours if there is no response.</li> </ul>	<a href="#">Portfolio distribution of VSC OA VMs</a>		<p><b>Note:</b></p> <p>If bank information form does not match with the verification portal, GSSU will proceed with data from the portal.</p>
b.	Candidate	Send clarification to GSSU	Volunteer sends clarification (missing information) to GSSU			
4.	GSSU	Create vendor profile and complete task	Confirm creation of Vendor Profile in ATLAS Finance by completing 'Review banking information' task in UVP.			<p><b>Note :</b> For cases with specific local bank requirements which result in <i>ad hoc</i> procedures to create</p>

			Indicate Vendor number in the vendor ID field in the candidate details page.			vendors and record bank, VSC liaises with UNDP CO Finance Unit to get guidelines, and provide them to GSSU.
5.	OA	Unsuccessful case and follow up with volunteer	OA to follow up with candidate and ask them to clarify the request and respond to GSSU (putting OA in copy). UVP also sends generic email to candidate with case outcome.			
6.	System	Notification	UVP sends generic email to requestor, candidate and GSSU with case outcome			

**B. Automated notification to request entry of banking info in Atlas HCM at hiring (all volunteers)**

1.	NUNV/IUNV	Enter bank details in UVP	When offer is accepted, complete the task 'Add bank information'. Enter bank details in UVP under 'My banking' and submit.			All candidates enter bank details after offer acceptance as described in vendor creation workflow above
2.	OA	Hire in Atlas	Hire UN Volunteer in Atlas			
3.	System	Automatic notification	Send automatic notification to GSSU and create task on GSSU dashboard			
4.	GSSU	Enter banking information in Atlas HCM	Enter banking information in Atlas HCM as per current banking information in UVP			<b>Note:</b> Intermediary bank account for Atlas HCM can only be entered by GSSC Copenhagen. GSSU to request from GSSC Copenhagen directly.
5.	GSSU	Confirm task complete	Complete 'review banking information' task			

C. UN Volunteer self-service updates during assignment and repatriation (including when IUNVs open local bank account)						
1.	System (UVP)	Notify UN Volunteer	One week after contract start date, notify UN Volunteer with instructions to update bank information once local account opened.			
2.	Volunteer	Update bank information and submit	Update banking information in UVP and submit. Add additional bank account if needed and choose the percentage split between the accounts.			<p><b>Note:</b> Volunteers are allowed two changes in bank information per year.</p> <p>Changes due to reassignment or unavoidable bank detail changes (banks merging, changing IBAN numbers or SWIFTs etc.) do not count towards these two changes.</p>
3.	System	Automatic notification	Send automatic notification to GSSU and create task on GSSU dashboard			<p><b>Note:</b> Intermediary bank account for Atlas HCM can only be entered by GSSC Copenhagen. GSSU to request from GSSC Copenhagen directly.</p>
4.	GSSU	Request clarification/correction	In case clarification/correction is needed: Contact candidate using 'request edit' function in UVP (sends automated email to candidate).			<p><b>Note:</b> If the verification portal (Routing, IBAN and Swift) does not match with</p>

			<p>Or directly by email if needed (e.g. to request proof of banking).</p> <p>If no response from candidate:</p> <ul style="list-style-type: none"> <li>-Send a reminder after 24 hours and final reminder 48 hours. If no response within 96 hours, email OA at VSC and mark case as pending. After sending an email to OA, GSSU will close the case after 48 hours if there is no response.</li> </ul>		Email	<p>vendor form-GSSU will proceed with data from the portal if the branch name did not match with bank information form.</p>
5.	Volunteer	Send clarification to GSSU	Volunteer sends clarification ( missing information) to GSSU			
6.	OA	Unsuccessful case and follow up with volunteer	OA to follow up with candidate and ask them to clarify the request and respond to GSSU (putting OA in copy). UVP also sends generic email to candidate with case outcome.		Email	
7.	GSSU	Confirm task complete	Complete 'review banking information' task		Email	<p><b>Note:</b></p> <p>Volunteers can request update of their bank information/VLA distribution twice in year (every month) and the process will be the same as before (B: Step 1-5)</p>

**D. Monthly Statistical Report (IUNV and NUNV)**

1.	GSSU	Monthly reports	GSSU provides monthly reports to UNV (VSS Onsite Programme Associates and Chief of Finance and Budget Section and VSC Team Leader) on volume and informs about issues that cause delays in creation and update of vendor form.			
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**Abbreviations**

GSSU-General Shared Services Unit  
 PA-Programme Assistant in Field Unit  
 PAn-Programme Analyst  
 PRA-Payroll Associates