Add Observations

Overview: Add an observation to a partner's profile to record brief notes on past collaboration, risk or other key issues.

The following types of observations can be added:

- *Non-risk* related observation to record notes that do not relate to fraud, corruption, ethical concern or other reputational risk for the organization.
- A *Yellow Risk Flag* is used for **alleged** fraud, corruption, ethical concern or other reputational risk for the organization.
- An *Escalated Risk* is used for potential partner risks that need be further reviewed by headquarters
- A *Red Risk Flag* is used for **confirmed** fraud, corruption, ethical concern or other reputational risk for the organization.

NOTE: Only users with the correct administrative privileges can add observations to partners' profiles. Please review the 'User Roles' guide for UN staff to see which user in your agency can add observations organizations. Additionally, UN staff can only flag organizations within their assigned country/countries of operation in the portal, with the exception of users that have a different level of administrative privileges.

Steps	Description	Action	Notes
1	Partners	Click on the *'Partners'* icon (1) to access the partners page	This will direct you to the *Partners* page. You can search for a specific partners using the filters on the page.
2	Partner Organization	Click on the partner organization's name (2) that you want to flag	You will be directed to the partner's page
3	Partner Page	View a summary of the partner organization in the *'Overview'* (1) tab Click on vertical bullets to '*Add Observation' (2)*	The system should display a pop up to add an observation for this organization. *Non-risk* related observation to record notes that do not relate to fraud, corruption, ethical concern or other reputational risk for the organization. Yellow flags are used to inform UN agencies of **potential** risk issues that are specific to the partner that may compromise their partnership with the UN. These can include alleged fraud, corruption, ethical concern or other reputational risk for the organization. A yellow flag will not prohibit the UN from working with the organization, but raises potential risk that signals to the UN agencies that they should exercise due diligence when working with the organization. An *Escalated Risk* is used for potential partner risks that need be further reviewed by headquarters Red flags are used by HQ administrators to inform UN agencies of **confirmed** cases that will compromise current and future partnerships with the organization. These can include confirmed fraud, corruption, ethical concern or other reputational risk for the organization. Red flags will be escalated and reviewed by designated HQ based UN administrators for the potential deactivation of the partners' profile.
4a	Add Non-Risk Related Observation	In response to the question- Does this observation relate to fraud, corruption, ethical	Non-risk related observation is note that do not relate to fraud, corruption, ethical concern or other reputational risk for the organization.

		concern or other reputational risk? Select 'No, not risk-related' (1) In the *'Comments'* (2) box enter the details of your observation. You can also choose to enter the details of the individual raising the flag (name, telephone, email) (3). This information will be auto-populated from the user profile. If needed you can also upload a file (4) that is related or supports your observation. (Optional) Click on 'Save' (5) to post your observation	An organization will not be able to see that an observation has been posted on its profile. Once an observation is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization. A user with the correct administrative privileges can post an observation to a partner's profile from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.
4b	Add Yellow Risk Flag Observation	In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select the yellow flag- *'Yes, add risk flag'* (1) Select the *'Category of risk'* (2) In the *'Comments'* (3) box enter the details of your observation. You can also choose to enter the details of the individual raising the flag (name, telephone, email) (4). This information will be auto-populated from the user profile. If needed you can also upload a file (5) that is related or supports your observation. (Optional) Click on 'Save' (6) to post your yellow flagged observation	An organization will not be able to see that a yellow flagged observation has been posted on its profile. A *Yellow Risk Flag* is used for **alleged** observation of fraud, corruption, ethical concern or other reputational risk for the organization. Once a *Yellow Risk Flag* is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization. A user with the correct administrative privileges can post a yellow flag from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.
4c	Add Escalated Flag Observation	In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select the red flag- *'Yes, add risk flag'* (1) Select the *'Category of risk'* (2)	An *Escalated Risk* is used for potential partner risks that need be further reviewed by headquarters An organization will not be able to see that a red flag has been posted on its profile. Once a red flag is posted you cannot edit or remove the flag. Only an HQ administrator in your agency can remove a red flag after further review.

			Once an escalated flag is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization.
		In the *'Comments'* (3) box enter the details of your observation. You can also choose to enter the details of the organization's contact person (name, telephone, email) (4). This information will be auto-populated from the organization's profile. If needed you can also upload a file (5) that is related or supports your observation. (Optional) Click on 'Save' (6) to post your red flagged observation	HQ administrators can also review the escalated flags and depending on the severity of the issue choose to deactivate the profile, preventing the organization to receive future funding via UNPP. A user with the correct administrative privileges can post a red flag from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.
5	View and Edit Observations	In the partner's page click on the *'Observations'* tab (1) to view the details of the observations and flags posted on the organization's profile. Click on the > arrows to view the details of the observation/flag (2) In the flag details screen click *on the Pencil icon (3) to edit the observation/flag.*	Only users with the correct administrative privileges can view the observations included in an organization's profile. Escalated flags cannot be edited and must be reviewed by an HQ administrator to edit and/or remove them. Only the individual that created the non-risk observation or yellow flag or an HQ administrator can edit the flag to determine that it is not valid. When an observation/flag is determined as no longer valid, it is still archived in the observations section. However, the organization will no longer appear as flagged or have a noted observation.
6	Edit Observations	To edit your observation to inform UNPP users that the observation is not valid, click on 'This flag is no longer valid' (1), enter the reason for decision (3) and click save (4). To escalate your observation/flag for more serious review and consideration by your agency's HQ, select 'Escalate to UN Headquarters Editor' (2), enter the reason for decision (3) and click save (4).	Only yellow flags can be edited to remove their valid status. Escalated and Red flags must be reviewed by an HQ administrator to remove their valid status. Only the individual that created the yellow flag or an HQ administrator can edit the flag to determine that it is not valid. When a yellow flag is determined as no longer valid, it is still archived in the flag status section. However, the organization will no longer appear as yellow flagged for this specific flag.
7	Edit an Escalated Observation/Flag	To edit you an escalated flag/observation to inform UNPP users that the risk should be managed at the country level, click on 'This risk is deferred to the country office for local decision making' (1), provide a comment (3) and click save (4). To edit you an escalated flag/observation to inform UNPP	Only designated HQ users can complete this function. Deferring the risk to the country level means that the HQ user has read the observation/flag and determined that it is not serious enough to red flag the observation and that risks should be managed by the country office. Red flagging an organization means that all agencies using the UNPP will not be able to partner with this organization using the portal.

		users that no partnership should take place with the organization, select 'No partnership should take place with the flagged organization'(2), provide a comment (3) and click save (4).	

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1	Partners	Click on the *'Partners'* icon (1) to access the partners page	This will direct you to the *Partners* page. You can search for a specific partners using the filters on the page.
2	Partner Organization	Click on the partner organization's name (2) that you want to flag	You will be directed to the partner's page

Steps	Description	Action	Notes
3	Partner Page	View a summary of the partner organization in the *'Overview'* (1) tab Click on vertical bullets to *'Add Observation' (2)*	The system should display a pop up to add an observation for this organization. *Non-risk* related observation to record notes that do not relate to fraud, corruption, ethical concern or other reputational risk for the organization. Yellow flags are used to inform UN agencies of **potential** risk issues that are specific to the partner that may compromise their partnership with the UN. These can include alleged fraud, corruption, ethical concern or other reputational risk for the organization. A yellow flag will not prohibit the UN from working with the organization, but raises potential risk that signals to the UN agencies that they should exercise due diligence when working with the organization. An *Escalated Risk* is used for potential partner risks that need be further reviewed by headquarters Red flags are used by HQ administrators to inform UN agencies of **confirmed** cases that will compromise current and future partnerships with the organization. These can include confirmed fraud, corruption, ethical concern or other reputational risk for the organization. Red flags will be escalated and reviewed by designated HQ based UN administrators for the potential deactivation of the partners' profile.

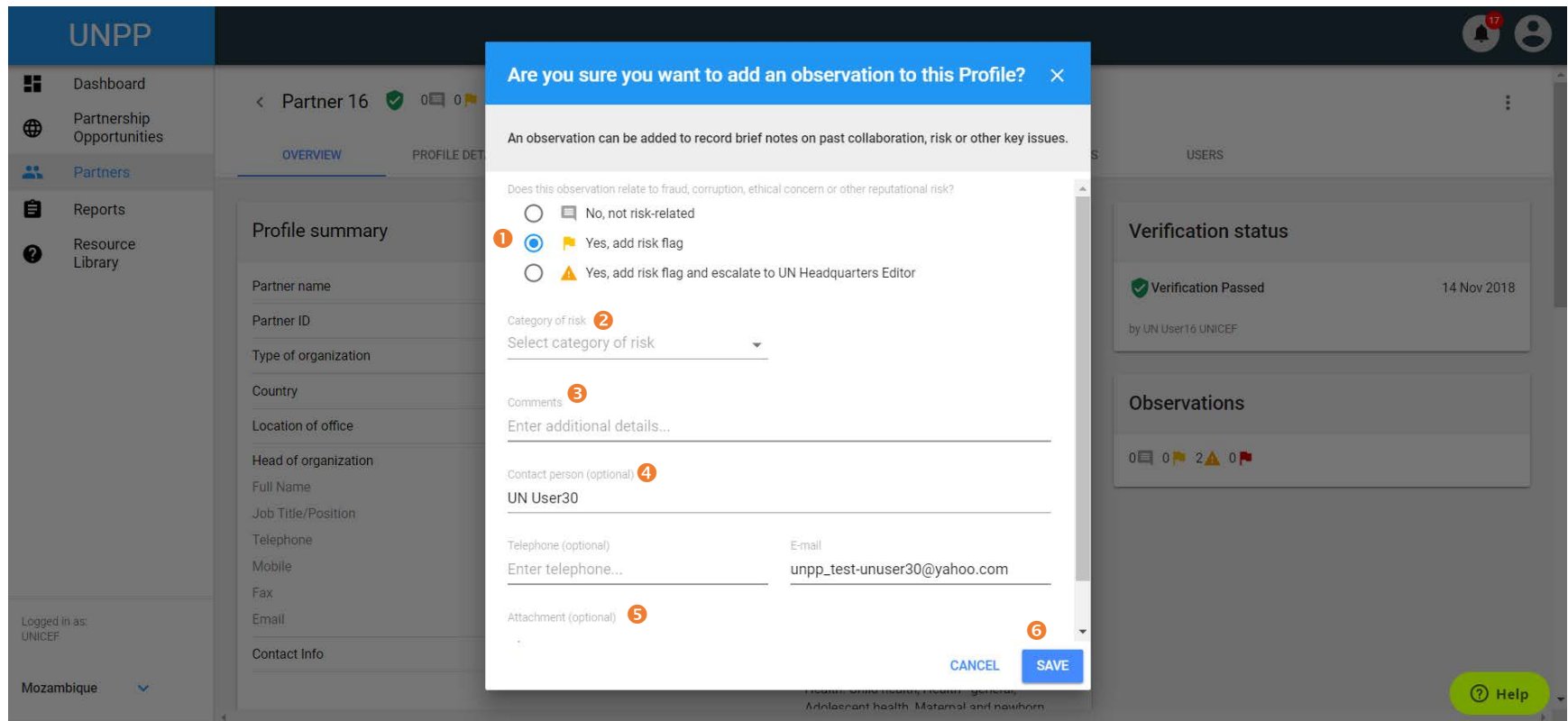| Steps	Description	Action	Notes
4a	Add Non-Risk Related Observation	In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select 'No, not risk-related' (1) In the *'Comments'* (2) box enter the details of your observation. You can also choose to enter the details of the individual raising the flag (name, telephone, email) (3). This information will be auto-populated from the user profile. If needed you can also upload a file (4) that is related or supports your observation. (Optional) Click on 'Save' (5) to post your observation	Non-risk related observation is note that do not relate to fraud, corruption, ethical concern or other reputational risk for the organization. An organization will not be able to see that an observation has been posted on its profile. Once an observation is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization. A user with the correct administrative privileges can post an observation to a partner's profile from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.

STEP 4a

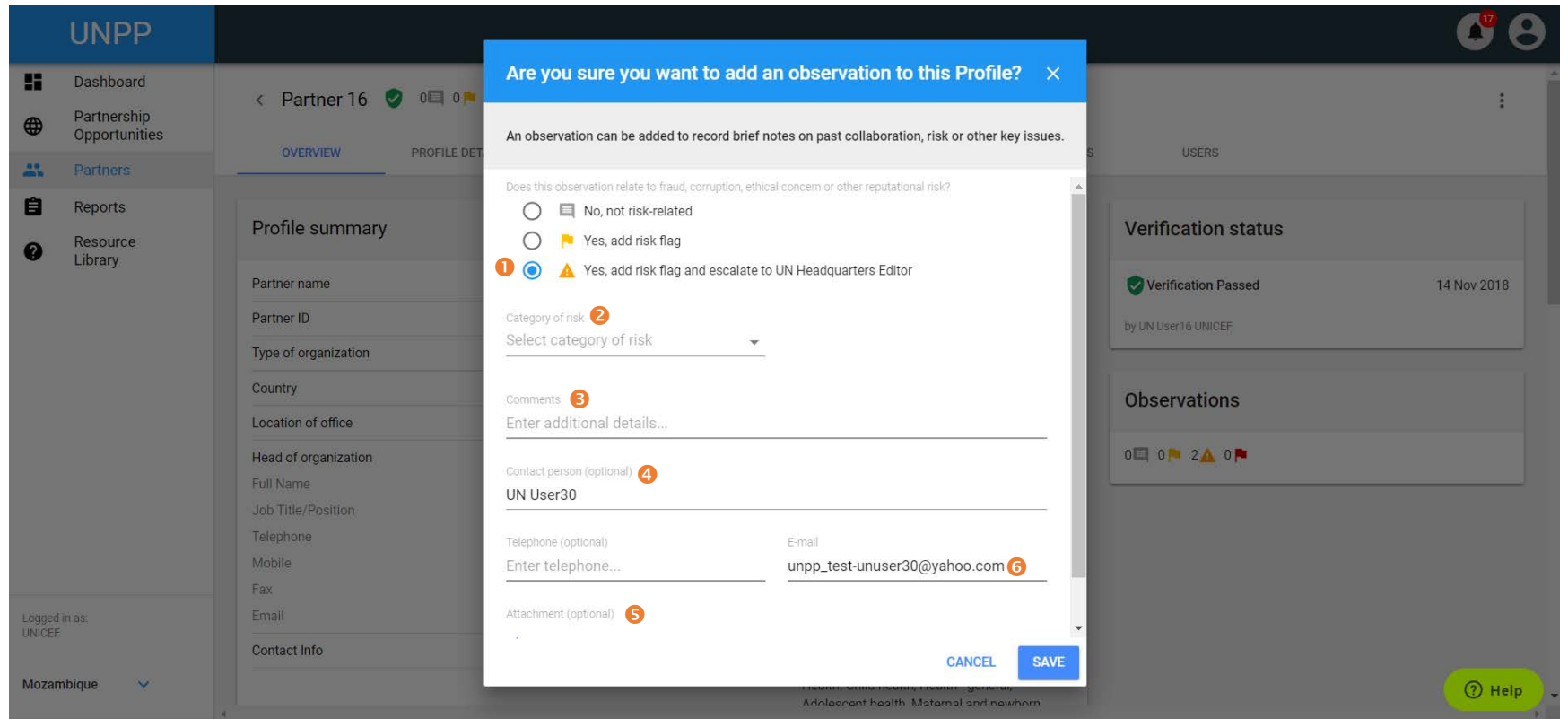| Steps	Description	Action	Notes
4b	Add Yellow Risk Flag Observation	In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select the yellow flag- *'Yes, add risk flag'* (1) Select the *'Category of risk'* (2) In the *'Comments'* (3) box enter the details of your observation. You can also choose to enter the details of the individual raising the flag (name, telephone, email) (4). This information will be auto-populated from the user profile. If needed you can also upload a file (5) that is related or supports your observation. (Optional) Click on 'Save' (6) to post your yellow flagged observation	An organization will not be able to see that a yellow flagged observation has been posted on its profile. A *Yellow Risk Flag* is used for **alleged** observation of fraud, corruption, ethical concern or other reputational risk for the organization. Once a *Yellow Risk Flag* is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization. A user with the correct administrative privileges can post a yellow flag from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.

Steps	Description	Action	Notes
4c	Add Escalated Flag Observation	In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select the red flag- *'Yes, add risk flag'* (1) Select the *'Category of risk'* (2) In the *'Comments'* (3) box enter the details of your observation. You can also choose to enter the details of the organization's contact person (name, telephone, email) (4). This information will be auto-populated from the organization's profile. If needed you can also upload a file (5) that is related or supports your observation. (Optional) Click on 'Save' (6) to post your red flagged observation	An *Escalated Risk* is used for potential partner risks that need be further reviewed by headquarters An organization will not be able to see that a red flag has been posted on its profile. Once a red flag is posted you cannot edit or remove the flag. Only an HQ administrator in your agency can remove a red flag after further review. Once an escalated flag is posted, only UN agency users with the right administrative rights can view your comments and notes about the organization, allowing them to undertake additional due diligence activities if they are partnering with the organization. HQ administrators can also review the escalated flags and depending on the severity of the issue choose to deactivate the profile, preventing the organization to receive future funding via UNPP. A user with the correct administrative privileges can post a red flag from any of the participating agencies on UNPP. This allows the UN to share information and better coordinate when managing risks to partnering with civil society organizations.

STEP 4c

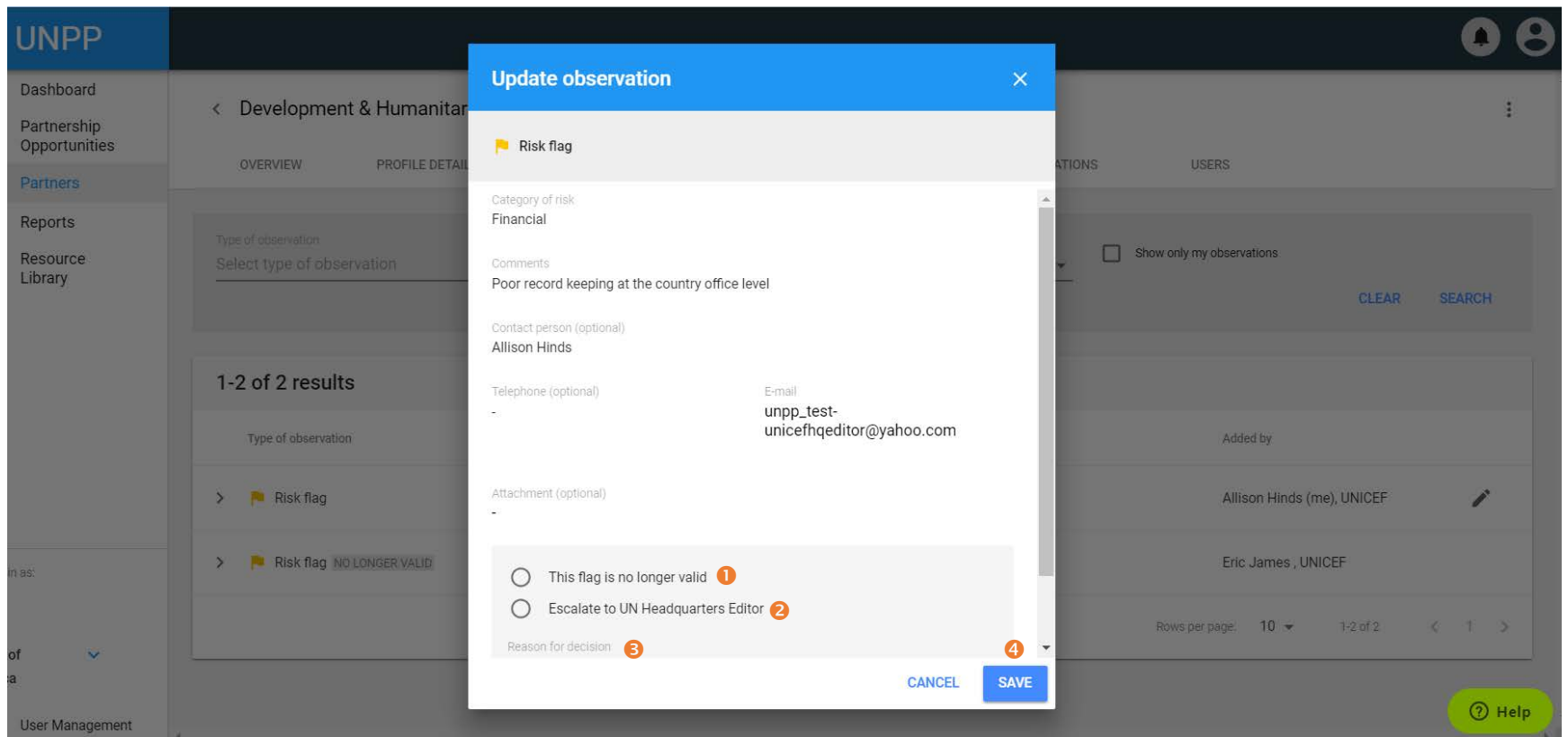| Steps	Description	Action	Notes
5	View and Edit Observations	In the partner's page click on the *'Observations'* tab (1) to view the details of the observations and flags posted on the organization's profile. Click on the > arrows to view the details of the observation/flag (2) In the flag details screen click *on* the *Pencil icon (3) to edit the observation/flag.*	Only users with the correct administrative privileges can view the observations included in an organization's profile. Escalated flags cannot be edited and must be reviewed by an HQ administrator to edit and/or remove them. Only the individual that created the non-risk observation or yellow flag or an HQ administrator can edit the flag to determine that it is not valid. When an observation/flag is determined as no longer valid, it is still archived in the observations section. However, the organization will no longer appear as flagged or have a noted observation.

STEP 5

Steps	Description	Action	Notes
6	Edit Observations	To edit your observation to inform UNPP users that the observation is not valid, click on 'This flag is no longer valid' (1), enter the reason for decision (3) and click save (4). To escalate your observation/flag for more serious review and consideration by your agency's HQ, select 'Escalate to UN Headquarters Editor' (2), enter the reason for decision (3) and click save (4).	Only yellow flags can be edited to remove their valid status. Escalated and Red flags must be reviewed by an HQ administrator to remove their valid status. Only the individual that created the yellow flag or an HQ administrator can edit the flag to determine that it is not valid. When a yellow flag is determined as no longer valid, it is still archived in the flag status section. However, the organization will no longer appear as yellow flagged for this specific flag.

STEP 6

Steps	Description	Action	Notes
7	Edit an Escalated Observation/ Flag	To edit you an escalated flag/observation to inform UNPP users that the risk should be managed at the country level, click on 'This risk is deferred to the country office for local decision making' (1), provide a comment (3) and click save (4). To edit you an escalated flag/observation to inform UNPP users that no partnership should take place with the organization, select 'No partnership should take place with the flagged organization'(2), provide a comment (3) and click save (4).	Only designated HQ users can complete this function. Deferring the risk to the country level means that the HQ user has read the observation/flag and determined that it is not serious enough to red flag the observation and that risks should be managed by the country office. Red flagging an organization means that all agencies using the UNPP will not be able to partner with this organization using the portal.

STEP 7