

ConnectCarolina User Group Meeting

*HR Topic: 2015 End of Semester Processing
for Students*

April 22, 2015



What are the user group meetings?

- ➔ “Deep dives” into hot topics
- ➔ A chance to ask questions
- ➔ Open to anyone who uses ConnectCarolina
- ➔ Please encourage your coworkers to come

Welcome

Anita Collins

Change Management Lead





Deep dive topic for today:

Spring 2015

**End-of-Semester Processing
for Students**

Topic	Presenter	Time
Introduction	Anita	5 min
Expected End Date Report - InfoPorte	Vicki	5 min
Spring 2015 End of Semester Processing		25 min
<ul style="list-style-type: none"> EPA 	Megan	
<ul style="list-style-type: none"> SPA 	Corrie	
Workflow in ConnectCarolina	Dave	15 min
Questions	All	10 min

Remember: Getting Help

- ➔ The Help Desk is the *best* way to ensure your question or issue doesn't get lost
- ➔ Two key ways:
 - 919-962-HELP
 - help.unc.edu



Expected End Dates Report InfoPorte

Vicki Bradley

*Sr. Director, Office of Human Resources
ConnectCarolina*

Expected End Date Report

The screenshot displays the iNFOPORTE web application interface. At the top, there is a navigation bar with a search field, a 'Go' button, a bookmark icon, an 'Online Help Request' button, a Twitter icon, and a user profile for 'Anita'. Below this is a main navigation bar with the iNFOPORTE logo and several icons: Home, Inbox, HR (highlighted with an orange box), Legacy HR, Tools, and Cores. A secondary navigation bar contains buttons for 'Employees', 'Positions', 'Reports' (highlighted with an orange box), 'Request', and 'Payroll'. The main content area shows a 'Report Type' dropdown menu. The dropdown list includes the following items: '- Select -', 'Funding', 'Funding Report', 'Person', 'Action History Report', 'Active Faculty Report', 'Count Report', 'Employee Academic Rank Report', 'Employee Job-Position Report', 'Expected End Date Report' (highlighted with an orange box and a mouse cursor), 'FTE Info for Affordable Care Act report', 'Faculty Analysis Report', 'Faculty Zero salary Zero FTE report', 'Hire Report', 'Job Action and Position History', 'Overtime Compensation Report', 'Retirement Age Report', 'Salary Alignment Report', and 'State Funded Position Vacancy Report'.

A | Job Family | P

Expected End Dates Approaching

Empl ID Search

Employee ID

Regular Temporary Filter

- Regular
- Temporary

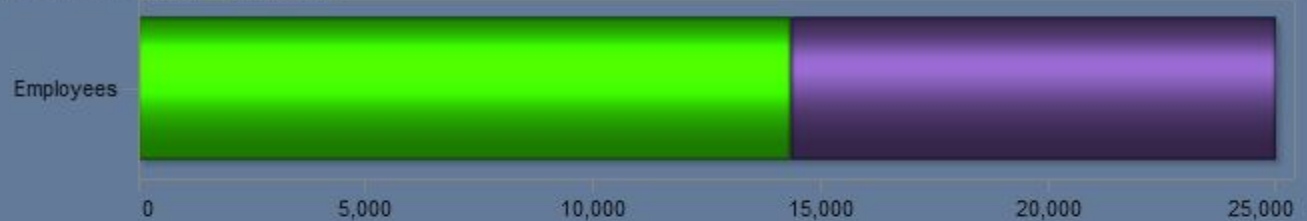
Job Function Description

- 001-SPA
- 002-EPA Non Faculty
- 003-Faculty
- 004-SPA Students
- 005-EPA Students / ...
- 006-Post-Doc

Academic Rank Description

- (missing values)
- Adjunct Assistant Pr...

Expected End Date Y/N?



End Date Arrival Time



Department

- A and S - Business Center
- Acad Initiatives-UBC
- Acad Sup Prog Student-Athletes
- Academic Advising
- AGG-Anesthesi...

Business Unit Description

- Acad Initiatives - UBC
- Centers & Institutes
- Chancellor
- College of Arts & Sciences
- Continuing Education

Employees with their Expected End Dates

Employee ID	Employee Full Name	Department Id	Department Description	Pos
720337954	GARCIA, ANGIE	543000	Scholarships and Student...	000
703090513	JONES, BILL	541000	Admissions	010

Spring 2015 End of Semester Processing for EPA Students

Megan Keefe

ConnectCarolina

Senior Business Analyst and Team

Lead, HRIM

Job Code	Description
800168	Graduate Assistant
800169	Graduate Teaching Assistant
800170	Graduate Research Assistant
800171	Fellow Trainee
800172	Graduate Teaching Fellow
800174	EPA Undergraduate
800183	Senior Teaching Fellow
800184	Instructional Assistant

- Expected Job End Date Management
 - Required for EPA students
 - Should be the first day that the student will be terminated or on short work break (not the last date worked)
 - Use the “Expected Job End Date” report, available on InfoPorte, to monitor Expected Job End Dates
 - Actions to Reappoint, place on Short Work Break, or Terminate must be processed PRIOR to the Expected Job End Date

- Expected Job End Date and Pay
 - Expected Job End Date does not stop pay automatically
 - A Termination or Short Work Break action must be processed to stop pay
 - Actions to Reappoint, Terminate or place on Short Work Break must be entered prior to the Expected Job End Date
- Stipend Calculator
 - We strongly recommend using the Stipend Calculator, which will soon be available on the Graduate School's website, under Policies:
<http://gradschool.unc.edu>

- Reminder: The Expected Job End Date should be the first day that the student will be terminated or on short work break (not the last date worked)
- Reminder: The effective date of the Termination or Short Work Break action should be the first day that the student will be terminated or on short work break (not the last date worked)
- When placing a student on Short Work Break, you must also extend their Expected Job End Date at the same time. The Expected Job End Date should be extended out to either January 1 (Fall) or May 15 (Spring) of the last semester in which the student will be employed



'Special Handling' for EPA Students with Expected Job End Dates in April and May

- Updates for EPA students with Expected Job End Dates in April
- Processing actions for EPA students with Expected Job End Dates in May
- Returning EPA students from Short Work Break

'Special Handling' for EPA Students with Expected Job End Dates in April and May

- To avoid shorting EPA student employees one day of pay for April monthly payroll the ConnectCarolina team has done the following updates to Expected Job End Date:
 - 4/24/2015 (last day of classes) is now 4/25/2015
 - 4/30/2015 is now 5/1/2015
- This is a one time update and not something the team will do regularly
- If you have a student whose end date was extended incorrectly, please submit a Help Ticket ASAP

- If you have students with Expected Job End Dates in April and you have not processed Short Work Break or Termination actions for them, please submit a Help Ticket and Overpayment paperwork

- ConnectCarolina will provide each School/Division with a report including all EPA student employees with an Expected Job End Date in May. Report will be distributed to the ConnectCarolina Liaisons by Monday, April 27
- Includes EPA students whose Expected Job End Date was 4/30/2015 (now 5/1/2015)

- School/Division will review and update the spreadsheet with the following for each employee:
 - Action to be taken (Termination, Short Work Break, No Action)
 - Effective Date of the action (first day in Terminated or Short Work Break status)
 - For Short Work Break actions, School/Division must also provide an updated Expected Job End Date. The Expected Job End Date should be extended out to either January 1 (Fall) or May 15 (Spring) of the last semester in which the student will be employed

- School/Division will return the completed spreadsheet by end of day on Friday, May 8
- After receiving the completed spreadsheets, ConnectCarolina will do the following:
 - Update the current Expected Job End Date based on the effective date of the Termination or Short Work Break action
 - Process Short Work Break and Termination actions based on the information from the spreadsheet for those actions that are effective in May or on June 1. Processing will be done prior to the May (M11) monthly payroll lockout (May 19)

- School/Division is responsible for entering Termination or Short Work Break ePARs for any actions that are effective after June 1
- Expected Job End Date must be updated when placing a Student on Short Work Break
- Reminder: If you Terminate a student and later rehire them, you must process a new I-9 within 3 business days of the rehire action effective date

- School/Division is responsible for processing a Return from Work Break action for EPA students on Short Work Break before August 17, the data entry deadline for the August (M02) monthly payroll
- ConnectCarolina will terminate any EPA students remaining on Short Work Break in mid-September 2015

Get help with EPA student terminations/short work breaks:

Walk-In Help Session

Thursday, April 30

3:00-4:00 p.m.

AOB Room 1402

Spring 2015 End of Semester Processing for SPA Students

Corrie Mimms

*Lead Employment Consultant, OHR
ConnectCarolina*

- There is no “short work break” for SPA students.
- Unlike with EPA students, an SPA student will be automatically terminated on his/her Expected Job End Date.
- SPA students will automatically lose their FICA exemption over the summer if they are not reflected as enrolled in Campus Solutions
- If a Student changes employee groups, then use the Hire form to transfer them into a new or vacant position

Current UNC Chapel Hill Student

UNC Student enrolled in
Spring and Fall semesters
(*Summer School optional*)

Work Study Student continuing to
work over the summer

Background Check: Not Required *unless
student will have contact with minors*

I-9: Required

Posting/Waiver: Not Required

Minimum Salary: \$7.25

Student enrolled at another university or attending High School

UNC Student enrolled in the Spring but enrolled at another university in the Fall

Background Check: Required

I-9: Required

Posting/Waiver: Required

Minimum Salary: \$7.25

Graduating student continuing to work post-graduation

Pre-UNC student between school (ie. High School & Undergrad, Undergrad & Grad) who has enrolled but not officially started the semester

Background Check: Required

I-9: Required

Posting/Waiver: Required

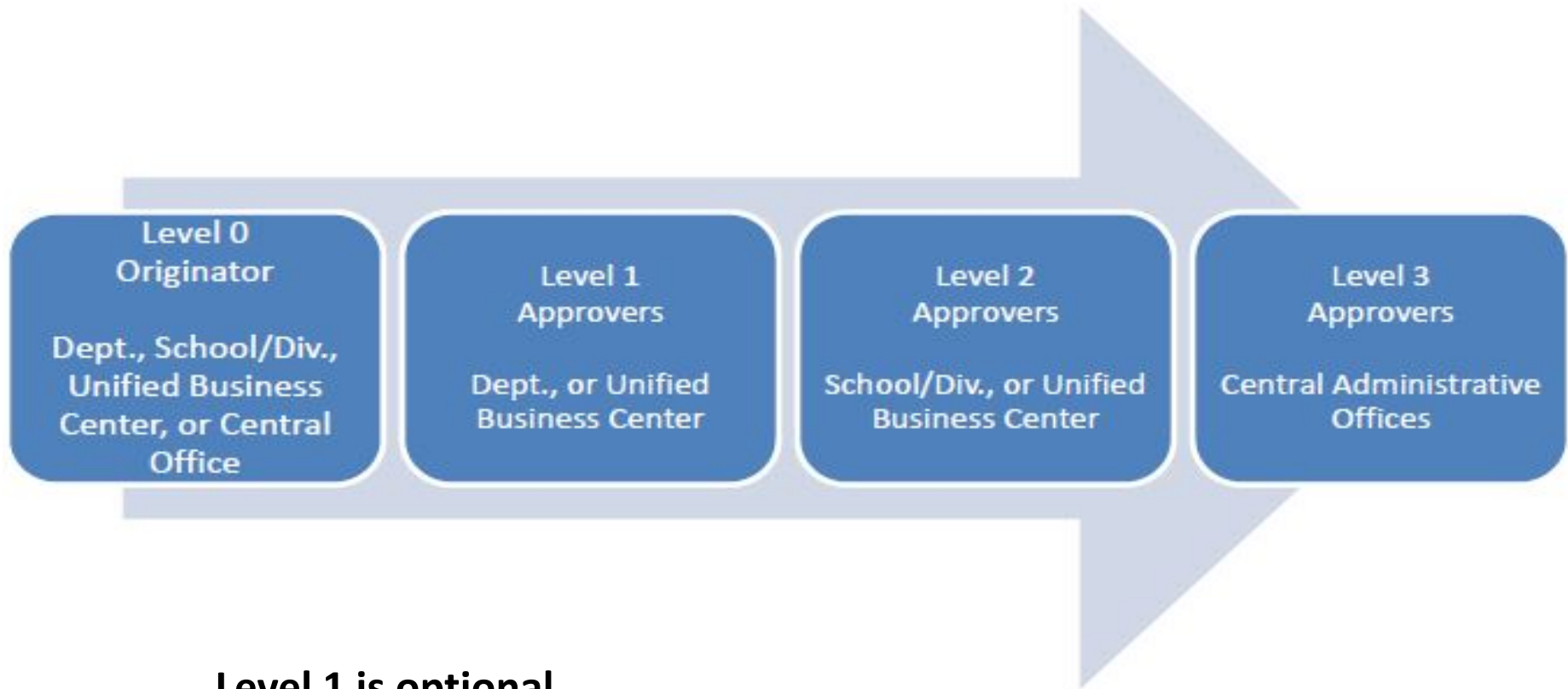
Minimum Salary: \$10.61

Workflow in ConnectCarolina

Dave Turner

HR Project Analyst

ConnectCarolina



Level 1 is optional

Level 2 is required for HR and Budget approvers

Level 3 is conditional

- Level 1 and Level 2 both have **4** workflow roles:
 - HR Representative
 - Budget Representative
 - Student Approver
 - Student Reviewer

**Forms: Job Change, Position Change, Status Change,
Lump Sum, and Fund Swap**

- **HR Representatives** (This role does not approve actions for SPA or EPA Students or SPA Temporaries.)
 - The employee's primary department receives an approval request.
 - The employee's secondary departments receive notification.

Forms: **Job Change, Position Change, Status Change,
Lump Sum, and Fund Swap** (continued)

- **Budget Representative** (This role does not approve actions for SPA Students.)
 - The employee's primary department receives an approval request, as well as any department where funding changed.
 - Any department that funds the employee, but that funding did not change, receives a notification.

**Forms: Job Change, Position Change, Status Change,
Lump Sum, and Fund Swap (continued)**

- **Student Approver** (This role only approves actions for SPA and EPA Students.)
 - The employee's primary department receives an approval request.

- **Student Reviewer** (This role only receives notifications for SPA and EPA Students.)
 - The employee's primary department receives notification.

Forms: Hire

- **HR Representatives** (This role does not approve actions for SPA or EPA Students or SPA Temporaries.)
 - If the incumbent is not currently employed at UNC, the department on the eForm receives an approval request.
 - If the incumbent is currently employed at UNC, the department on the eForm and the employee's primary department receives an approval request.
 - The employee's secondary departments receive notification.

Forms: **Hire** (continued)

- **Budget Representative** (This role does not approve actions for SPA Students.)
 - The employee's primary department receives an approval request, as well as any department where funding changed.
 - Any department that funds the employee, but that funding did not change, will receive notification.

Forms: **Hire** (continued)

- **Student Approver** (This role only approves actions for SPA or EPA Students.)
 - The department on the eForm and the student's primary department (if applicable) receives an approval request.
- **Student Reviewer** (This role only receives notifications for SPA and EPA Students.)
 - The department on the eForm and the student's primary department receives notification.

Forms: **Add / Update Affiliate**

- There are no level 1 (or level 2) approvals for this form.

Forms: All Forms (except Add/Update Affiliate)

- Every department has identified its level 2 department for workflow purposes.
- After all of the assigned level 1 reviewers approve an action, the level 2 departments that have been identified receive the same type of approval/notification that the level 1 department received.

Forms: All Forms (continued)

- Level 3 approvals and notifications are based on conditional logic that can be triggered by combinations of Employee Group, Action and Reason, Regular/Temporary status, Funding Type, etc...
 - Academic Personnel Approves Faculty, EPA Non-Faculty HR does not
 - Budget Office approves actions on State funds, OSR does not
 - Payroll wants to be notified when a termination is due to death

What To Do If Workflow Is Not Working

- Contact the Help Desk and report the problem.
 - 919-962-HELP
 - help.unc.edu



Thank you for your participation.

