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

Anita Collins
Change Management Lead
Deep dive topic for today:
Spring 2015
End-of-Semester Processing for Students
<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Anita</td>
<td>5 min</td>
</tr>
<tr>
<td>Expected End Date Report - InfoPorte</td>
<td>Vicki</td>
<td>5 min</td>
</tr>
<tr>
<td>Spring 2015 End of Semester Processing</td>
<td></td>
<td>25 min</td>
</tr>
<tr>
<td>• EPA</td>
<td>Megan</td>
<td></td>
</tr>
<tr>
<td>• SPA</td>
<td>Corrie</td>
<td></td>
</tr>
<tr>
<td>Workflow in ConnectCarolina</td>
<td>Dave</td>
<td>15 min</td>
</tr>
<tr>
<td>Questions</td>
<td>All</td>
<td>10 min</td>
</tr>
</tbody>
</table>
Remember: Getting Help

✔ The Help Desk is the \textit{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
Spring 2015 End of Semester Processing for EPA Students

Megan Keefe

ConnectCarolina
Senior Business Analyst and Team Lead, HRIM
<table>
<thead>
<tr>
<th>Job Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>800168</td>
<td>Graduate Assistant</td>
</tr>
<tr>
<td>800169</td>
<td>Graduate Teaching Assistant</td>
</tr>
<tr>
<td>800170</td>
<td>Graduate Research Assistant</td>
</tr>
<tr>
<td>800171</td>
<td>Fellow Trainee</td>
</tr>
<tr>
<td>800172</td>
<td>Graduate Teaching Fellow</td>
</tr>
<tr>
<td>800174</td>
<td>EPA Undergraduate</td>
</tr>
<tr>
<td>800183</td>
<td>Senior Teaching Fellow</td>
</tr>
<tr>
<td>800184</td>
<td>Instructional Assistant</td>
</tr>
</tbody>
</table>
General Information

- **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
General Information

• 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
EPA students with Expected Job End Dates in MAY

• 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)
EPA Student Actions after MAY

- 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
Returning EPA Students from Short Work Break

• 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
Walk-in Help Sessions

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
<table>
<thead>
<tr>
<th><strong>Current UNC Chapel Hill Student</strong></th>
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<tbody>
<tr>
<td><strong>UNC Student enrolled in</strong></td>
</tr>
<tr>
<td><strong>Spring and Fall semesters</strong></td>
</tr>
<tr>
<td><em>(Summer School optional)</em></td>
</tr>
<tr>
<td><strong>Work Study Student continuing to</strong></td>
</tr>
<tr>
<td><strong>work over the summer</strong></td>
</tr>
<tr>
<td><strong>Background Check: Not Required</strong></td>
</tr>
<tr>
<td><strong>unless student will have contact with minors</strong></td>
</tr>
<tr>
<td><strong>I-9: Required</strong></td>
</tr>
<tr>
<td><strong>Posting/Waiver: Not Required</strong></td>
</tr>
<tr>
<td><strong>Minimum Salary: $7.25</strong></td>
</tr>
</tbody>
</table>
Other SPA Student Assistant
Quick Reference

- 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
Level 1 Approvals and Notifications

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.
Level 1 Approvals and Notifications

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.
Level 1 Approvals and Notifications

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.
Level 1 Approvals and Notifications

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.
Level 1 Approvals and Notifications

Forms: Add / Update Affiliate

• There are no level 1 (or level 2) approvals for this form.
Level 2 Approvals and Notifications

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.
Level 3 Approvals and Notifications

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.