HR Topic: Overview of Affiliates

May 27, 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:
Overview of Affiliates
<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>Overview of Affiliates</td>
<td>Dave</td>
<td>15 min</td>
</tr>
<tr>
<td>Affiliate ePAR Form</td>
<td></td>
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</tr>
<tr>
<td>Affiliate Request System</td>
<td>Melinda</td>
<td>15 min</td>
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<tr>
<td>Things to Remember</td>
<td></td>
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<tr>
<td>Contingent Worker</td>
<td>Mike</td>
<td>10 min</td>
</tr>
<tr>
<td>Entering Employee Performance</td>
<td>Chris</td>
<td>5 min</td>
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<tr>
<td>Evaluation Ratings in InfoPorte</td>
<td></td>
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</tr>
<tr>
<td>Questions</td>
<td>All</td>
<td>10 min</td>
</tr>
</tbody>
</table>
Overview of Affiliates

Dave Turner

HR Project Analyst

ConnectCarolina
Overview

What is an Affiliate?

• An Affiliate is any person who needs University resources to work with UNC – Chapel Hill. There are 26 different types of Affiliates, including:
  – Retirees
  – Contractors
  – Visiting scholars

Who is not an Affiliate?

• Anyone paid by University payroll
• Anyone teaching for UNC-Chapel Hill, for-credit courses
• Anyone enrolled in classes
• UNC Health Care employees
Who has access to set up an Affiliate?

- Basic HR Originators can perform actions in ConnectCarolina for Affiliates. This includes:
  - Student Originators
  - Complex Originators

How do you set up an Affiliate?

- Actions are initiated using one of two processes:
  - ePAR Form
  - Affiliate Request System
Do Affiliates need a background check?

- Background checks required for:
  - Independent Contractors
  - Interns
  - Volunteers
  - Visiting Scholars

**Contact the Background Check unit in OHR** at 919-962-2903 if you have questions regarding this.
How do I begin?

Always start with an Affiliate ePAR Form
Navigation:

HR/Payroll Menu
HR WorkCenter
ePAR Home Page
Start a new ePAR
Add or Update an Affiliate
Search Fields

**Affiliate Lookup**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**

- **Empl ID:**
  - =
  - 

- **Name:**
  - begins with
  - 

- **Last Name:**
  - begins with
  - JOHNSON

- **Date of Birth:**
  - =
  - 

- **SSN:**
  - begins with

- **Address:**
  - begins with

- **City:**
  - begins with

- **State:**
  - begins with

- **Postal Code:**
  - begins with

- **Case Sensitive**

[Search]  [Clear]

[Basic Search]  [Save Search Criteria]
Search Results

Only the first 300 results can be displayed.

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<tr>
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<th>Name</th>
<th>Last Name</th>
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<th>City</th>
<th>State</th>
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</tbody>
</table>

View All
Add or Update an Affiliate

Step 1 of 1: Affiliate Data

Affiliate Information

Name: [Redacted]
Date of Birth: [Redacted]
National ID: [Redacted]
Sponsor Department: 300100 - Arts and Sciences Deans Office
Affiliate Type:

File Attachments

<table>
<thead>
<tr>
<th>Upload</th>
<th>View</th>
<th>Description</th>
<th>Doc ID</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Add File Attachment

Form Messages

- Affiliate Background Check
  - Message Text: I certify that, where policy requires it, I have received a notice from the Office of Human Resources that the background check has been completed for this individual. In the comments section, I have included the background check file number, or a justification as to why the number is not required.

Comments

Your Comment: [Redacted]
• Enter the Department number that is sponsoring the Affiliate. If you do not know the department you can click on the magnifying glass and it will show you all the departments.
• Select the Affiliate Type that best describes how the person will be classified on campus.
• Once you select the Affiliate type there will be fields for you to complete regarding the details of the affiliation.
• Types of affiliates listed on the handout.
Affiliate Details

- Complete all required fields.
- Make sure to write why the person needs their affiliation in the Affiliate remarks area.

### Affiliate Details

- **National ID:** XXX-XX-XXXX
- **Address:** 104 Stadium Drive, Chapel Hill, NC, 27514
- **Sponsor Department:** 273500 Ath Football Office
- **Affiliate Type:** External Employee
- **Affiliate Start Date:** 09/18/2014
- **Affiliate End Date:** 09/18/2016
- **Affiliate Status:** Active
- **Will this Person Be on Campus?** Yes
- **Does this Person Need a One Card?** Yes
- **Full or Part Time:** Part Time
- **Describe activities and specify environment setting:**
  - Affiliate will be working concessions for Football games

### Other Details

- **Affiliate Title:** Cashier
- **Sponsor ID:** 730000XXX Jane Traingood
- **Sponsor Phone:** 919/962-5555
- **Sponsor Email:** Jane_Traingood@unc.edu
- **Affiliate Remarks:** Affiliate will be working concessions for Football games
Submitting the ePAR

- Currently there are no files to upload for the affiliation.
- You must check to acknowledge you have completed the background check or a background check was not required.
- **Click on the Submit button**
• A message will appear asking if you are sure you want to submit the form. Once you click on the Yes button, the form will be submitted to the PID Office for approval.
Finalizing the Form

- The ePAR has been sent to the PID Office for review.
Finalizing the Form

- To review the ePAR form, click on the View an ePAR link on the ePAR Home Page or, you can access it through your Worklist.

**ePAR- - Personnel Action Request Home Page**

- **Start a new ePAR**
  Start a new ePAR, which will then be routed to the appropriate approvers.

- **Resubmit, Change, or Withdraw an ePAR**
  Make changes to an ePAR that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.

- **FYI Notifications Inbox**
  Review an ePAR that was sent to you for review and has not yet been viewed by you. This is a read-only view.

- **Evaluate an ePAR**
  Evaluate an ePAR that is waiting at your approval level.

- **View an ePAR**
  View a submitted ePAR, including information about its handling so far. This is a read-only view.
Adding an Affiliate in the Affiliate Request System

Melinda Bakken

PID Administrator
PID Office
Searching in Affiliate Request

• Log into the Affiliate Request System.
• Click on the “Search” link at the top of the page.
Searching in Affiliate Request

Search using:
• First and last name
• Previous names given
• Partial name
• SSN
• Email address
If you find a match verify the additional information to make sure you have the correct person and that they have an employee or affiliate POI type.

<table>
<thead>
<tr>
<th>SubPop</th>
<th>POI #</th>
<th>POI Description in CC</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIS</td>
<td>00009</td>
<td>Campus Solutions Person</td>
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<tr>
<td>HRIS</td>
<td>00012</td>
<td>Employee</td>
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<tr>
<td>HOSP</td>
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<td>Parents of Plus Loan Students</td>
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<tr>
<td>ADPRO</td>
<td>00017</td>
<td>Admissions Pros</td>
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<tr>
<td>SEVIS</td>
<td>00020</td>
<td>SEVIS Dependents</td>
</tr>
</tbody>
</table>
If they have the POI type, search in Connect Carolina again, if found- proceed to the ePAR form.

If they do not have the correct POI, call the PID office to have it added. Search again in Connect Carolina, if found proceed to the ePAR form.

<table>
<thead>
<tr>
<th>SubPop</th>
<th>POI #</th>
<th>POI Description in CC</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIS</td>
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<td>Campus Solutions Person</td>
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<tr>
<td>HRIS</td>
<td>00012</td>
<td>Employee</td>
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<td>HOSP</td>
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<tr>
<td>SEVIS</td>
<td>00020</td>
<td>SEVIS Dependents</td>
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</tbody>
</table>
Searching in Affiliate Request

- If you are unable to find a match, click on the Create Request link to enter their information into the Affiliate Request System.
Create Affiliate Request

In the first section you must include:

- Legal first and last name
- Gender
- Date of birth
- If the person will be on campus
- If they need a One Card

Any additional information you have you should enter to prevent duplicates from being created in the future.
The Affiliate Position section is where you will enter the sponsors information as well as the position information for the affiliate. There is now a place for home address. It is no longer required in the Affiliate Remarks section.
• Affiliate Phone, you can select either a home or a business number.
### Phone and Addresses

- **Affiliate Local Work Address**

<table>
<thead>
<tr>
<th>Address Line 1</th>
<th>104 Stadium Drive</th>
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</thead>
<tbody>
<tr>
<td>Address Line 2</td>
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<tr>
<td>Campus Box #</td>
<td></td>
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<tr>
<td><strong>Country:</strong></td>
<td></td>
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<tr>
<td>Ukraine</td>
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<tr>
<td>United Arab Emirates</td>
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<td>United Kingdom</td>
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<td><strong>United States</strong></td>
<td></td>
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<tr>
<td>City</td>
<td>Chapel Hill</td>
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<tr>
<td><strong>State:</strong></td>
<td>North Carolina</td>
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<tr>
<td>Zip</td>
<td>27599</td>
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</tbody>
</table>

**Public Directory Entry**: Yes
Phone and Addresses

- Affiliate local Home Address

Once all of this information is entered click on the Submit button to have the Affiliate Application sent to the PID Office.
Once the Affiliate Application has been submitted it will go through the normal review process. The PID Office will create both the PID and the Affiliation in Connect Carolina.

If the PID office is able to find a PID for the person, the application will be denied and you will need to start the process over.
Approved/Denied/Recycled

- A Denied application cannot be edited.
- A Recycled application needs to be set back to Pending before you resubmit.
- When an application has been approved, a PID will be assigned to it.

To locate an application you have submitted, click on the Search Requests link.

- This will bring up the affiliates for your department only.
- Set the Status Code to narrow down your results.
Things to Remember

• When the affiliation expires, the onyen is inactivated. The onyen is NOT automatically re-activated if you re-instate the affiliation. Contact the Help Desk in order to re-activate the onyen.
• An affiliate is not processed until the start date provided on the form.
• InfoPorte report listing affiliates by department and end dates has been requested.
Contacting the PID Office

- Location- basement of the Daniels Building (Student Stores)
- 919-962-6568
- 919-962-5014
- 919-962-9344
- pid@unc.edu
Contingent Workers

Mike Mathews
Interim Director for Academic Personnel
Provost’s Office
What is a Contingent Worker (CWR) Job

• A Job Code which may provide access to University resources for a person and/or provide a faculty rank required for accreditation purposes, but does not establish a legal employee relationship with the organization. This includes:
  • Zero Base Rate Faculty with no intent to pay
  • Post Doc External Payroll

Any “at will” non-salaried faculty appointments must be processed using the “Faculty Zero Base Rate (CWR)” Employee Group.
Can a person have both a CWR and an EMP relationship with the University?

Yes, providing the following conditions are met:

- The department sponsoring an ‘at will’ non-salaried appointment may not provide funding to the employee’s paid jobs.
- Payment cannot be made through the ‘at will’ faculty job.
If both conditions are met, the ‘at will’ non salaried appointment must be processed using the “Faculty Zero Base Rate (CWR)” Employee Group.

- ConnectCarolina does not require an Expected Job End Date be entered for CWR appointments.
- It is not possible to process payment against a CWR appointment.
- Review and adjust the Temporary/Regular field to Temporary if needed.
Contingent Workers

• If a person has both CWR and EMP jobs with the University, an EMP job must be designated as the primary job.

• Do not process ‘at will’ non salaried faculty appointments using the Faculty or Intermittent Faculty employee group with a fake Expected Job End Date.
Entering Employee Performance Evaluation Ratings

Chris Chiron

Interim Senior Director
Employee & Management Relations, OHR
Thank you for your participation.