HR/Payroll User Group Meeting

September 2015

ConnectCarolina
InfoPorte

Welcome

Anita Collins

ConnectCarolina

Change Management Lead

Agenda

Topic	Presenter
Reporting: Process for Requesting New Reports	Rich Arnold
Tricky Transactions, Part II	Megan Keefe Corrie Mimms
HR Reminders	Megan Keefe Corrie Mimms
Commitment Accounting Update	Brian Simet
Payroll Updates	Brian Simet

Reporting: Process for Requesting New Reports

Rich Arnold

Sr. Director, HR Information Management

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Home » Reporting

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REPORTING

- New Reports Notes
- In the Works
- Quick Reference Guide to Finance Reporting
- Student Administration Reports
- Access and Security
- Financial Reporting Task Force
- PeopleSoft Queries

Reporting

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New process to request reports! Use this New Report Information Request Form and follow this process to submit via a Help ticket.

Click here for a new guide that catalogues and describes the **Finance reports** and their uses. The guide is searchable and includes report descriptions, tips for how to use the reports and links to related training.

Short-Term Retro Tool Suspense Reports: A new report is now available that allows Retroactive Funding Transfer Application users to quickly see the status of short-term retro tool actions so that labor expenses still in suspense or in process can be addressed. Read more for details, training and documentation.

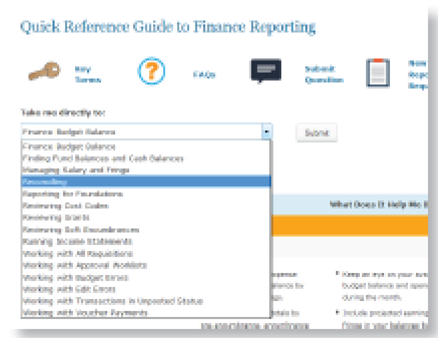
How to Make a New Report Request

Want to request a new report? Follow these three steps.

1. Check to see if a similar report is already available

- You can ask your MOU Lead or HR Manager if they are aware of a similar report that may handle your needs.
- Go to **http://ccinfo.unc.edu/reporting/finance-reporting** to see a full list of finance reports and queries.

  It will take some time to get to all the new report requests. In the meantime, other reports may already be available or may become available soon that meet your needs.



2. Fill out the new request form

- Download the form: **http://ccinfo.unc.edu/report-request**
- Fill out form completely to the best of your ability.
- For best results, create a mockup of the report you envision, provide screen shots of something similar, or show an example of an existing report or data that this request is based off of.

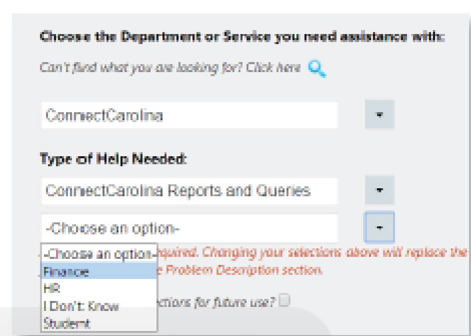
3. Submit a new request ticket

- Go to **http://help.unc.edu**. Select **Help Request**.
- Login and then select **New Request**.
- When choosing the category, make these selections:

  Service Type: Choose "ConnectCarolina."

  Type of Help 1: Choose "ConnectCarolina Reports and Queries."

  Type of Help 2: Choose the sub-category that best fits the type of report you are requesting.
- Don't forget to attach the report request form and any supplemental documents.



Report Information Request Form

Requester Information section (all required)

Name	Requester first and last names
Email and Phone Contact	Requester email address and phone number
Department Name	Requester's department name
Department Number (6 digit)	######

Requirement Details (all required)

Requirement #	Enter Remedy Ticket #, if available
Type of Request	Is this a New Report, a Report based on a Legacy Report (*provide legacy report's name*), or a modification to an Existing Report? (*provide existing report's name*)
Report Description	In one-two sentences describe the problem, or concern you're attempting to resolve with this report request and how the report assists with the solution
Report Initiator and Audience	State who you expect to run the report and what the intended audience is for the report. Can be a person or group.
Needed By	Specific date report is this needed by and why?
Frequency	How often will the report be run? ad-hoc (*as needed*), daily, monthly, quarterly, yearly, one time only, other

Content and Layout (please supply if possible)

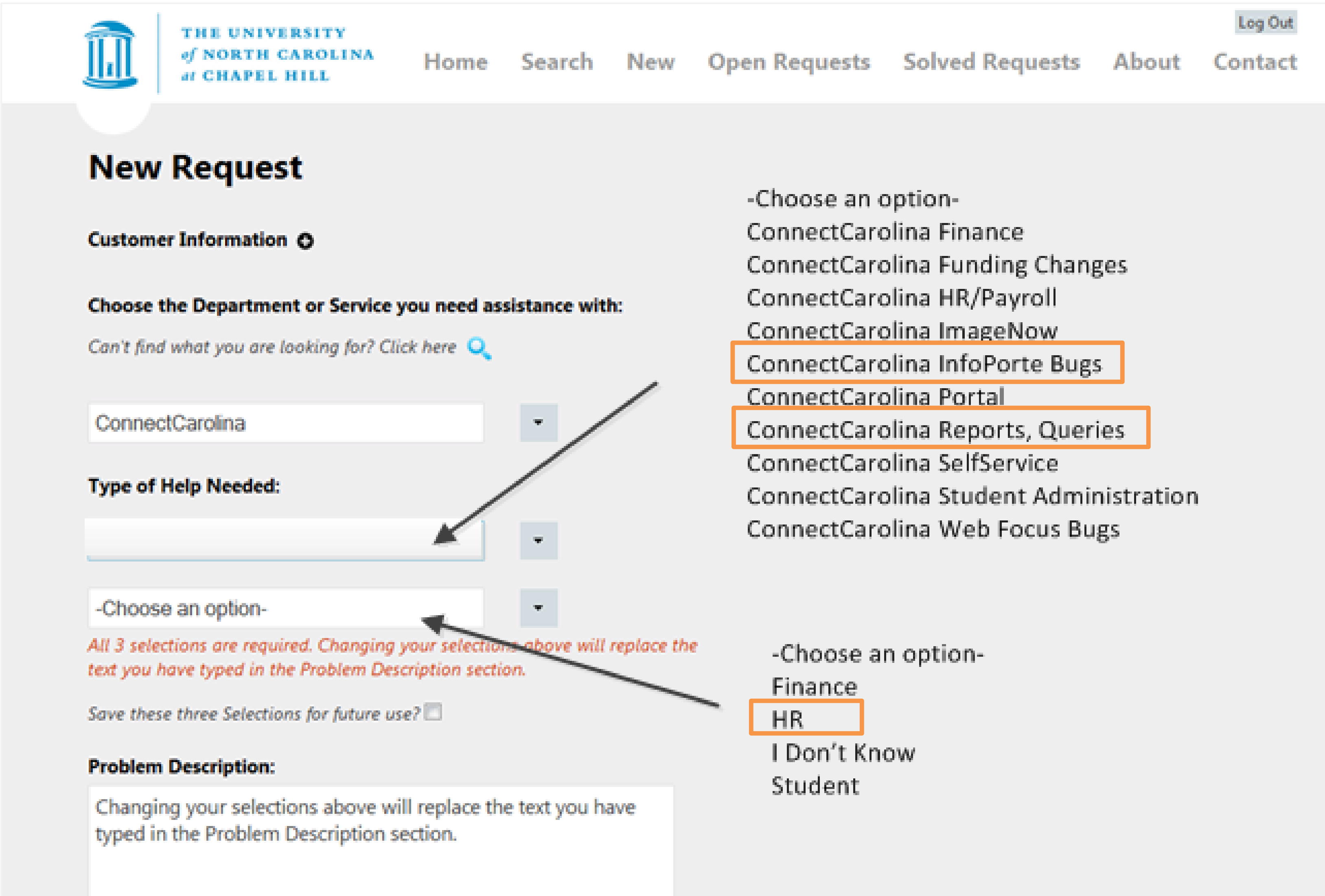
Selection Criteria	What criteria should be used to decide what data is displayed in the report? Are there specific field values you would want to enter when running the report to control the output (ie, prompts)?
Columns Needed	Please list the columns you need on the report in order of how you'd like them to appear in the report
Calculation Needs	Yes or No. Are there any columns of data that need to be reported on that are to be calculated or derived using other data?
Sorts	How should the report be sorted?
Format	Is there a specific format the report is needed in?
Download	Should the report be available to download to Excel?

Additional Information (please supply if possible)

Please send back as an attachment accompanying this document any of the following you have:

- Mockup of the Report you envision
- Screen Shots of something similar or the fields you need
- Example of an existing report this request is based off of

The Help Ticket



How Report Requests Are Prioritized

- Business Analyst initial review
  - Error correction on existing report/query
    - Infoporte
    - ConnectCarolina
  - Modification request on existing report/query
    - HR Business Process & Technology Subcommittee
    - Carolina HR Council
    - ConnectCarolina Integrated Management
  - New request for report/query
    - External Regulatory Report with fixed deadline
    - Operational report/query
      - HR Business Process & Technology Subcommittee
      - Carolina HR Council
      - ConnectCarolina Integrated Management

Tricky Transactions, Part II

Megan Keefe

Sr. Business Analyst and Team Lead,
HR Information Management

Moving supplemental pay from primary job to secondary job

- Scenario: Today is Wednesday, 9/16/2015 and you want to move supplemental pay for Professor Blue from his/her primary job to a secondary appointment.

- Which ePAR will be used for the changes?
  - JobChange ePAR

Moving supplemental pay from primary job to secondary job

- What effective date/s should you use?
  - (trick question – it depends!)
  - Must use same effective date for both actions
  - Both actions must fully execute prior to the lockout for the current monthly payroll
  - Don’t use ‘retro’ effective dates or employee will be underpaid
- Can you enter both ePARs at the same time?
  - Yes, because each action is on a different Empl Rcd

Moving supplemental pay from primary job to secondary job

- Which ePAR should be entered first?
  - Either way will work
  - Best practice is to start with the primary job
- What type of comp rate should be used for the Supplemental Pay?
  - SUPPRT (Monthly flat rate)

Moving supplemental pay from primary job to secondary job

- What happens if the ePAR to add the supplement to the secondary job executes prior to the September payroll lockout but the ePAR to remove the supplement from the primary job does not?
  - Employee will be overpaid in September
  - Retro Pay process will correct the overpayment in October paycheck (assuming the 2nd ePAR has executed prior to October monthly payroll lockout)

Moving supplemental pay from primary job to secondary job

- What happens if the ePAR to remove the supplement from the primary job executes prior to the September payroll lock but the ePAR to add the supplement to the secondary job does not?
  - Employee will be underpaid in September
  - Delivered Retro Pay will NOT pick up the September supplement for the secondary job because there was no paycheck data associated with that Empl Rcd for September
  - User must log Remedy ticket for back pay for September
  - Payroll will manually process September back pay in the employee's October paycheck based on the remedy ticket.

Tricky Transactions, Part II

Corrie Mimms

Lead Employment Consultant

Expected Job End Date

Scenario: The Developmental Engineering department is hiring Jane Jones into an EPA appointment for one year effective 10/1/2015.

- Is Jane's Expected Job End Date 9/30/2016 or 10/1/2016?
  - 10/1/16
  - The Expected Job End Date is always the first day the employee will no longer receive pay.

Expected Job End Date

- If the Expected Job End Date is 10/1/2016, what date is Jane expected to be paid through?
  - 9/30/2016
  - **Reminder**: EPA employees will continue to be paid if a termination action is not submitted to end their pay.

- If Jane is reappointed for one more year, what form should the department use?
  - Edit Existing Job ePAR
  - The Edit Existing Job ePAR allows users to update job data information including expected job end date, working title, supervisor, and pay.

Expected Job End Date

- What effective date should be used on the Edit Existing Job form to extend the end date?
  - 10/1/2016
  - The effective date is the first day the reappointment action is effective.

- What would be Jane’s new Expected Job End Date?
  - 10/1/2017
  - If an employee is being reappointed for a year, then we would expect the end date to be the first day the employee will no longer be paid.

Expected Job End Date

- When would the form to reappoint Jane need to execute by?
  - The ePAR should fully execute prior to the payroll lockout deadline in the month in which the reappointment is occurring.

- When would the form to extend an end date for an SPA Student or SPA Temporary need to execute by?
  - The ePAR should fully execute prior to the Expected Job End Date
  - Since SPA Students and SPA Temporary employees are terminated on their expected job end date, it's important an extension is executed prior to that date.

Expected Job End Date

- If Jane's appointment ends after one year, what would be the effective date of her termination?
  - October 1, 2016
  - Termination effective date is always the first day the employee will no longer receive pay.
- When would the form to terminate Jane need to execute by to ensure she is not overpaid?
  - The ePAR should fully execute prior to payroll lockout in the month in which the termination is occurring.
  - Departments need to ensure all School/Division approvals have been received by the School/Division deadline in order to ensure the ePAR is approved by Central Office prior to the payroll lockout.

HR Reminders

Megan Keefe

Sr. Business Analyst and Team Lead, HRIM

Corrie Mimms

Lead Employment Consultant

Effective Dating with lump sums – Best Practices

- Don't
  - Enter multiple future dated payments of the same payment type at the same time
  - Use effective dates in the past, especially if there are multiple payments of the same payment type for the employee
  - Use an effective date prior to employee's hire date
  - Use an effective date after employee's termination date
- Do
  - Use effective dates in the current pay cycle
  - Use the Work Period Start and End dates to reflect the actual dates work was performed
  - Use effective dates that line up with active employee status

Return from Work Break – Best Practices

- Don't
  - Enter a JobChange action without adding the Return from Work Break reason
  - Wait to enter the action until after the Expected Job End Date has passed
- Do
  - Use Return from Work Break action
  - Extend the Expected Job End Date at the same time
  - Initiate the ePAR prior to the date of the previous Expected Job End Date

Creating New Positions - Add/Update Position ePAR

- After passing Step 1 of the form do not navigate back and modify the funding data checkbox
  - ePAR will not execute or create the requested position number
  - Campus users will not be able to start new position requests
- Should the designation need to be changed, exit the existing ePAR without saving and start a new form
  - Demo

Commitment Accounting Update

Brian Simet

Payroll Director

Payroll Accounting Adjustment Tool (PAAT)

- Finalizing development
  - Finalizing conversion of data from Short-term retro tool
  - Reports
    - PeopleSoft – Integrated
      - Suspense
      - Pending
    - InfoPorte (due to potential impact on performance – t/b tested)
      - Labor Expenditure

- Final round of campus testing
  - Comprehensive end to end testing
  - First part of October
- Request for Access sent to MOU Leads this week - (for those who have performed transactions in the current tool)
  - Access for those who have not performed transactions in the current tool - follow regular access request process – form modified

Roles for the Tool

	Retro Type			Manage Retro Distributions	
Security Role	Retro by earnings (Ded, Tax follows)	Retro Deductions or Taxes	Retro Earnings only (Ded, Tax do not follow)	View Retro Distributions	Edit / Cancel Others?
Basic	Yes			Yes	No
Advanced	Yes	Yes		Yes	No
Approvers	Read-only	Read-only	Read-only		

Payroll & Commitment Accounting Update

- **Dollars to %**
  - Should simplify things
    - Especially for pay rate changes – LSI and ARP
  - GT will allow input of % in addition to dollars
  - Modifying GT
  - Modifying Reports
  - To be implemented in the coming weeks

Payroll Updates

Brian Simet

Payroll Director

Payroll Updates

- Online W2
  - Will rollout **2014** first in next couple of months
  - Access for separated employees, provided via
    - Guest account access
  - January 2016 – **2015** W2s will be available
    - 2016 “Green” initiative to get employees to waive paper W2

- W4 and NC4
  - Under development
  - 1st Qtr 2016 rollout
  - Can not be used by NRA’s

Payroll & Commitment Accounting Update

- **Out-of-State Tax Withholding**
  - Thanks for all of the forms submitted
  - Will be developing FAQ to put on website
  - Telecommuting – considered as working out of state
  - Business 2 Address should reflect physical work location
  - Reminder to complete **Notice of Employees Both Residing and Working Outside of North Carolina** and upon returning to NC
    - https://finance.unc.edu/files/2015/08/Notice_Employee_Working_Residing_Outside_NC.pdf

Payroll & Commitment Accounting Update

- **Manual check policy**
  - Attempt to standardize the process
  - Standard due dates
  - Standard issue date
    - Biweekly – alt Friday
    - Monthly – 11th work day following pay day
  - Minimal gross (prorate for part-time)
    - $290 biweekly ($7.25 x 40 hours)
    - $406 monthly ($7.25 x 7 days x 8hrs)
  - Edits made to earlier draft based on feedback
    - To be submitted (electronically) as an attachment to a Remedy Ticket
    - **<u>Requires</u>** HR Officer or above signature

Questions?

ccinfo.unc.edu