

HR User Group Meeting

Nov. 13, 2015



Topic	Presenter	Time
Announcements	Vicki Bradley	15 min
Legacy System Tips & Position History Report	Megan Keefe	10 min
2015/16 Future Work	Vicki Bradley	5 min
“The Most” Lunches Recap	Kelleigh Huggins	20 min
Questions		15 min



Announcements

Vicki Bradley

Senior Director, OHR

- **\$750 Bonus**
 - SPA – B11 (Payday Dec. 11)
 - EPA – M06 (Payday Dec. 22)
 - SPA Permanent, Probationary and Time-limited employees and EPA permanent employees employed as of Nov. 1, 2015
 - Not paid if separated prior to Nov 1 or hired Nov 2 or later
 - Pro-rated for FTE as of Nov 1
 - Employees on Leave of Absence who are eligible will receive the bonus
- **ARP (2%)**
 - Dec 22 Payday
 - Deans and Vice Chancellors may choose to supplement the 2% allocation pool with funds available in their school/division
 - Instructions / budget allocation sent out Wed to MOU Leads
 - MOU/HR Officers submit spreadsheets Thursday, Nov. 19 5:00
 - Uses current sources; PAAT to adjust charges as of Dec. 21



Organizational Change for InfoPorte

- With great thanks to Scott Jackson for leading the Enterprise Reporting and Departmental Systems (ERDS) team through:
 - The transition from a system serving a few schools to a system serving the entire campus
 - Building all the dataloads to populate the Data Warehouse with ConnectCarolina structures and data
 - Building screens and reports to provide access to Financial, Human Resources and Student Administration data
 - Tirelessly reaching out to campus to identify and resolve problems
- Enterprise Reporting and Departmental Systems are now part of the ITS Enterprise Applications Organization
 - Maribel Carrion, Senior Director, Application Support for Student Administrative Systems, will be Interim Director of ERDS
 - Reporting to Fran Dykstra

Our Focus For the Next Few Months



- This new handout provides tips for filtering your search results when searching for an existing ePAR

Connect CAROLINA
Tips for Searching for ePARs

Once an ePAR is entered and saved in the system, you can find it using the search page. To navigate to the search page:

- Choose this menu option:
 - Main Menu HR WorkCenter > ePAR Home Page
- Click on the **Evaluate an ePAR** link or click on the **View an ePAR** link.

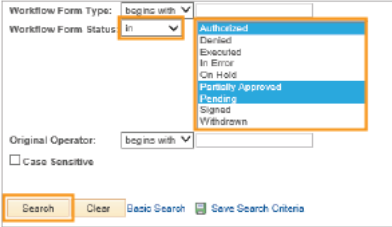
Result: The system displays the search page.

You can use the following tips to maximize your search for a specific ePAR.

Searching by more than one Workflow Form Status

ConnectCarolina defaults to search for one workflow form status at a time. To search for more than one workflow form status:

- Choose **in** from the drop-down list to the right of Workflow Form Status.
- Hold down the Ctrl key while clicking on the statuses to search by.
- Click on the **Search** button.

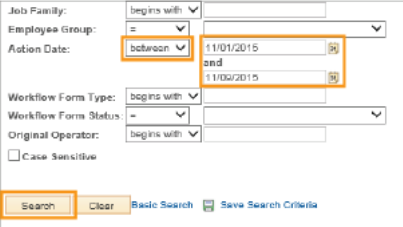


Result: The system displays a list of ePARs with the statuses you chose. For this example, the system lists all ePARs with a status of Authorized, Partially Approved, or Pending.

Searching by a range of effective dates

ConnectCarolina defaults to search for one effective date, or action date, at a time. To search for a range of dates:

- Choose **between** from the drop-down list to the right of Action Date.
- Type or choose a date range in the two date fields.
- Click on the **Search** button.



Result: The system displays a list of ePARs with the date range you chose. For this example, the system lists all ePARs with an effective date between 11/1 and 11/9/2015.

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Payroll Announcements

Connect
CAROLINA

Brian Simet, Welcome!


Favorites ▾ Main Menu ▾

View W-2/W-2c Forms

Brian Simet

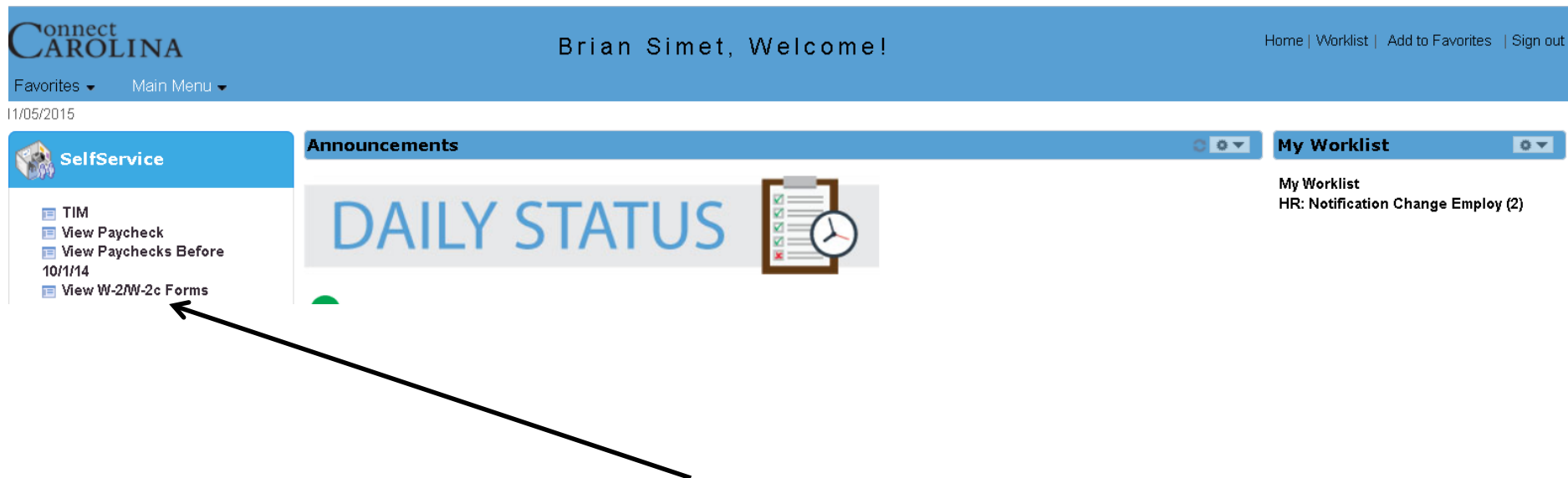
Review your available W-2 and W-2c forms below. Select the year end form that you would like to review.

[View a Different Tax Year](#)

Select Year End Form						Personalize 	1 of 1
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	Filing Instructions		
2014	UNC	W-2	10/21/2015	Year End Form	Filing Instructions		

- 2014 W2s will be available in coming days

Self Service—View W-2/W-2c Form



The screenshot displays the user interface of the Connect CAROLINA Self Service portal. At the top, a blue header bar contains the logo on the left, the user name "Brian Simet, Welcome!" in the center, and navigation links "Home | Worklist | Add to Favorites | Sign out" on the right. Below the header, there are navigation menus for "Favorites" and "Main Menu". The date "11/05/2015" is shown on the left. The main content area is divided into three sections: "SelfService" on the left, "Announcements" in the center, and "My Worklist" on the right. The "SelfService" section lists several options: "TIM", "View Paycheck", "View Paychecks Before 10/1/14", and "View W-2/W-2c Forms". A black arrow points to the "View W-2/W-2c Forms" option. The "Announcements" section features a "DAILY STATUS" banner with a clipboard icon. The "My Worklist" section shows "My Worklist" and "HR: Notification Change Employ (2)".

- 2016 Payroll Calendars have been posted new columns

2016 Biweekly Lockout and Confirm Schedule

Pay Period Number	Pay Period	Payroll lockout (all transactions due)	Payroll confirm date	Payday		Manual Check Request Date**	Manual Check Pick Up Date
B13	Dec 14 – Dec 27	Jan 4	Jan 5	Jan 8		Jan 11	Jan 15
B14	Dec 28 – Jan 10	Jan 14	Jan 19	Jan 22		Jan 25	Jan 29

2016 Monthly Lockout and Confirm Schedule

Monthly Cycle	Pay Period	Payroll Lockout	Payroll Confirm date	Payday		Manual Check Request Date**	Manual Check Pick Up Date
M07	Jan 1-31	Jan 21	Jan 26	Jan 29		Jan 4	Jan 13
M08	Feb 1-29	Feb 19	Feb 24	Feb 29		Feb 4	Feb 15



Legacy System Tips and Position History Report

Megan Keefe

Senior Business Analyst and Team Lead, HRIM

- Accessing legacy job and position data from ConnectCarolina
 - ConnectCarolina Position History report
- Journal Entry History
- Legacy Data Warehouse access

Favorites ▾ Main Menu ▾ > HR/Payroll Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data 🔍

Work Location | Job Information | Payroll | Salary Plan | Compensation | **UNC Job Data**

Jane TarHeel

Employee

Empl ID: 788888888

Empl Record: 0

[Historic Personnel Actions](#)

[Image/Notes/Attachments](#)

Work Location

Find First ◀ 1 of 1 ▶ Last

*Effective Date:	<input type="text" value="12/01/2014"/> 📅			Go To Row	<input type="button" value="+"/>	<input type="button" value="-"/>
Effective Sequence:	<input type="text" value="0"/>	*Action:	<input type="text" value="Pay Rate Change"/> ▼			
HR Status:	Active	Reason:	<input type="text" value="ARP Salary Change 2014"/> ▼			
Payroll Status:	Active	*Job Indicator:	<input type="text" value="Primary Job"/> ▼			
			Current	📄		
Position Number:	<input type="text" value="01001655"/> 🔍	Director				
<input type="button" value="Override Position Data"/>						

Favorites ▾ Main Menu ▾ > HR/Payroll Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾

Description	Specific Information	Budget and Incumbents	UNC Position Summary	UNC Position Attributes
Position Information Find View All First ◀ 1 of 1 ▶ Last				
Position Number: 00000000 + -				
Headcount Status: Filled Current Head Count: 1 out of 1				
*Effective Date: 07/01/2015 *Status: Active				
Reason: WKP Chg Work Period 2080/2088/2096 Action Date: 07/09/2015				
*Position Status: Approved Status Date: 09/17/2014 <input type="checkbox"/> Key Position				
Historic Position Actions Image/News/Attachments				
Job Information				
*Business Unit: VCRSC VC Research				

Position History

Position Number: 00000000 Business Officer

[Current Position Data](#)

Phone type already exists.

[Find](#) | [View 2](#)

First 1-4 of 4 Last

78888888 Jane TarHeel

Compensation Rate

Sal Plan Grade Step

Position Entry Date: 06/15/2015

2,038.461538 

USD Biweekly

[Components](#)

1024 JRN

Position End Date:

[Components](#)

Exit Reason:

79999999 Mary Smith

Compensation Rate

Sal Plan Grade Step

Position Entry Date: 09/08/2014

2,227.500000 

USD Biweekly

[Components](#)

1024 JRN

Position End Date: 04/13/2015

2,285.192308 

USD Biweekly

[Components](#)

1024 JRN

Exit Reason: Transfer

72222222 Joe Jones

Compensation Rate

Sal Plan Grade Step

Position Entry Date: 12/01/2010

USD Biweekly

[Components](#)

JRN

Position End Date:

[Components](#)

Exit Reason:

Coming Soon: Journal Entry History

Journal Entry History Report

Empl ID



TarHeel, Jane

List Associated Journal Entries

	Journal Entry	Begin Date	End Date	Status	Position #	Department #
1	J001400	12/01/2000	05/06/2001	Active	0000000.	9999
2	J104017	12/01/2001	04/21/2002	Active	0000000	9999
3	J205807	07/01/2002	11/30/2002	Active	0000000.	9999
4	J207452	12/01/2002	01/12/2003	Active	0000000	9999
5	J207453	01/13/2003	06/15/2003	Active	0000000.	9999
6	J309559	06/16/2003	07/13/2003	Active	0000000	9999

Coming Soon: Journal Entry History

Payroll Journal Entry Report

Action Description	Begin Date	End Date	Journal Entry ID	Status
Journal Entry	2011-03-28	2011-06-05	JA06221	Active

Person ID	Name	Title
70000000	TarHeel, Jane	Director

Dept #	Department Name	Position	Salary/H R Rate
9999	OHR HRIM	0000000	60000

From Sources:

Account	Object	Amount	Percent	Budget	Purpose	Dept	Sub a/c	Cost code	Sub Sub code	Cost share
5-32614	1212	41704	100	0	110	9999				

To Sources:

Account	Object	Amount	Percent	Budget	Purpose	Dept	Sub a/c	Cost code	Sub Sub code	Cost share
3-61214	1212	25664	61.5385	0	110	9999				
5-31073	1212	16040	38.4615	0	110	9999				

Comments

- **Finance Legacy Data Warehouse in InfoPorte**
 - To see if you have access to the Finance legacy data warehouse, click the **Legacy Accounts** button in the top, right corner of InfoPorte and then look for a **Legacy Warehouse** tab:



- **HR Legacy Data Warehouse in InfoPorte**

- To see if you have access to the HR legacy data warehouse, click the **Legacy HR** button and then look for the **Legacy HR** tab:





Access to the HR legacy data warehouse

- You can work with your InfoPorte Administrator to get access to the legacy data warehouse if you don't have it now.
- You must have had access to the Datawarehouse in legacy to be granted access to it in InfoPorte
- At this time, new users cannot be granted access to the legacy datawarehouse



2015/16 Future Work

Vicki Bradley

Senior Director, OHR

Area	Project	Area	Project
Benefits	ACA - Long Term Plan (interface)	Core HR	2016 Annual Raise Process (ARP)
Benefits	ACA - Modification	Core HR	2080/2088/2096 Work Hours
Benefits	ACA - Year End Reporting - Outsourced	Core HR	Compensation Frequency on Job
Benefits	Add Faculty Physicians Fellows to Regular Payroll	Core HR	DDD Functionality
Benefits	Benefits Open Enrollment	Core HR	EEO Plan
Benefits	Benefits Statements	Core HR	FLSA Changes (Possible change)
CA/Finance	Grad star and Gship	Core HR	Long Term ARP Process
CA	eCRT certification	Core HR	Mass Update (e.g. auto-term)
CA	Mod to Labor Projections	Core HR	Mass update to Reports To/TIM approver
CA	PAAT (Payroll Accounting Adjustment Tool)	Core HR	Performance Mgmt
Core HR	2015 Annual Raise Process (ARP)	Core HR	Creating PIF-like functionality
Core HR	2015 Legislative Salary Increase (LSI)	Core HR	Probationary date change

Area	Project	Area	Project
Core HR	Revamping Business Unit	Maintenance	Oracle 12 Testing
Core HR	Summer School Job Codes	Payroll	Multi-state taxation
Campus Solutions	Address validation	Payroll	Revisit Post Docs
Campus Solutions	Campus Solutions Bundle testing	Payroll	Self Service W-4/NC-4
Campus Solutions	Implement Integration Integrity Utility	Payroll	Tax Updates
GA	Legacy Decommissioning for GA	Payroll	TIM Upgrade
GA	PeopleAdmin Interface for GA	Payroll	W2 / Year End
General	Data validation	Security	Dynamic assignment of pages
General	GA Datamart Revisions	Security	Security Model updates
General	Planning for Upgrade 9.2	Security Audit	Security Audit - Round 2
Learning Management	Learning Management Changes	Self Service	Guest ID Registration for terminated employees for W2's and Paychecks
Maintenance	HCM Bundles/Maintenance Pack	Self Service	Self-service implementation (Race/Ethnicity)
Maintenance	PeopleTools 8.55		

HR/Payroll Project List – Beyond FY2015/2016 (Draft)

Area	Project	Area	Project
Core HR	PA Interface for New Hires	GT	GT Upgrade or revisions to front end
Core HR	Track disability accommodations	Learning Management	Bringing in training records from other delivery mechanisms
CS	Revamp Affiliate Process	Learning Management	Enterprise Learning Management Module
CS	Revamp Person Data update	Payroll	Revisit Additional Pay
General	Conversion from Alchemy to ImageNow	Payroll	Online Direct Deposit
General	Publishing GT stats - Dashboard	Payroll	Time and Attendance
General	Upgrade 9.2	Security	Break out Basic Originator Role
General	Workflow simplification	Security	Revisit Security Request Process
GT	GT Changes to GRID or removal of GRID	Security	Revisit Student Originator Role
GT	GT Search		



“The Most” Lunches Recap

Kelleigh Huggins

ConnectCarolina Training Supervisor



It was very rewarding for everyone involved

- High volume performers were recognized
- Strengths and weaknesses in the system were identified
- Provided the opportunity to discover process issues vs. technical issues
- Rich discussions included processes surrounding ePAR forms including workflow and reporting.



Hire ePAR - Pros and Cons

- Built in logic on the form limits the choices for the other fields
- When using positions, much of the information is filled in
- Hiring a student into a secondary job routes to the primary department for approval, delays may cause student to not get paid



Status Change ePAR- Pros and Cons

- Easy to use, look ups work well
- Quick and simple to use
- Would like a hold button
- Put appointment end date at the top of the form
- Processing student actions can be very complex, especially for Student originators.



Lump Sum - Pros and Cons

- Very straightforward, easiest form.
- Familiar because modeled after the EPA Web form.
- Want to go back to the *initiate a Lump Sum* page rather than *ePAR home* page.
- Not easy to work with the limitations surrounding the effective date.



Edit Existing Job ePAR- Pros and Cons

- Easy to search and find employees.
- Easy to add attachments – however some attachments need to be broken down into two documents due to size.
- Would like to expand the size limit for working titles.
- Would like to be able to change TIM approver and supervisor at the same time.
- It would be helpful to pull up information others did in the same department – not just by originator.



Affiliate- Pros and Cons

- Integrate the two systems
- Start date bug – if you future date the ePAR, onyen cannot be activated until the start date is current
Make it so people can set up affiliates before start date
- Would like a report or notification of affiliate end dates.
- Issues when the sponsor field is not recognized
- Can't add GA affiliates



Positions- Pros and Cons

- Form is user friendly, however, unclear about distinction between position and job.
- Do not want the funding box checked by default.
- Would like to see if a position is vacant or filled.
- When using the 'previous' button, it corrupted the form.
- Changing the job code or employee group resets the FTE



Fund Swaps- Pros and Cons

- Easy to find employees and work with the form
- The stacked grids sometimes are hard to look at and discern what is going on at a glance.
- Need to be able to look up employee by name or PID.
- Would like the employee group field, at the bottom of the form, to auto select



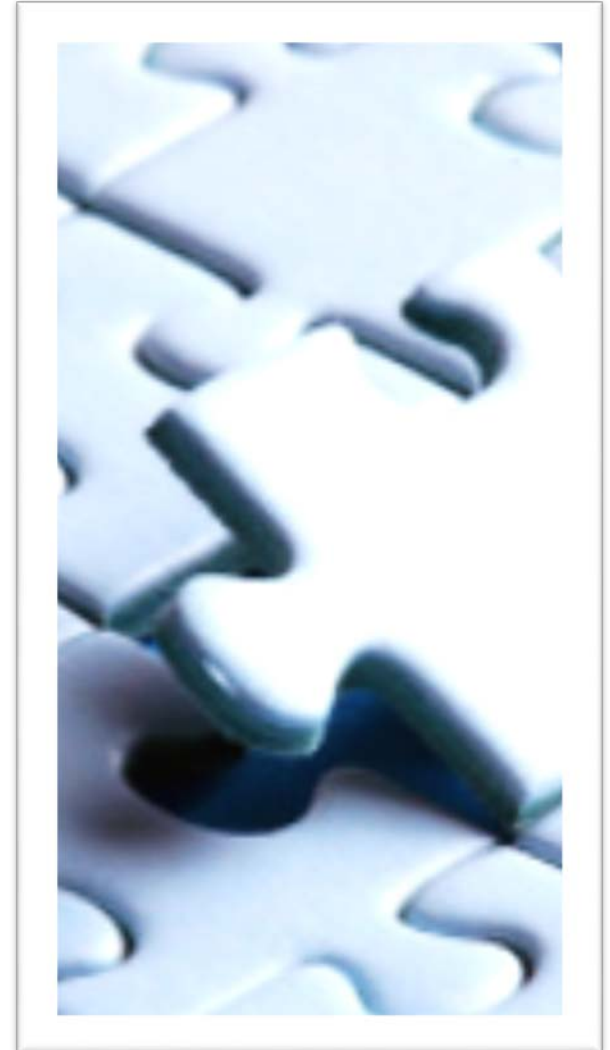


- Would like to enter multiple people on one form
- Would like to see better documentation
- It would be helpful to pull up information others did in the same department – not just by originator.
- Would like to be able to change the TIM manager and supervisor on the same action.
- Student originators do not see enough information in ConnectCarolina

- Would like guidance on action reasons and how to use them.
- Would like an inquiry into funding data.
- A better way to help managing FTE for temps with multiple jobs.
- Want to see attachment on an executed ePAR rather than view them in Job Data.
- More descriptive error message –particularly on funding grid.

Fixes already made

- Reports To and Supervisor ID information (including name of supervisor) has been added to the UNC Employee Information page. This change gives basic and student originators the ability to see more information.
- To return an employee from leave, only have to process for the primary job and now the secondary jobs follow.





Questions?