HR User Group Meeting

January 20, 2016
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<th>Time</th>
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<td>Effort Reporting</td>
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<td>5 min</td>
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<td>Retroactive Pay</td>
<td>Corrie Mimms</td>
<td>5 min</td>
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<td>EPA Recruitments and Hires</td>
<td>Corrie</td>
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<td>Online Help</td>
<td>Anita Collins</td>
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<td>Various HR Reminders</td>
<td>Corrie</td>
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<td>PAAT Reminders</td>
<td>Brian Simet</td>
<td>5 min</td>
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<td>Online Tax Forms Reminder</td>
<td>Brian</td>
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<tr>
<td>Questions</td>
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<td>10 min</td>
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</tbody>
</table>
Effort Reporting

Marty Bergerson
Manager, Huron Consulting Group
ecrt_help@unc.edu
ecrt Upgrade Overview

• Originally implemented ecrt in 2010
• UNC is moving from v3.03 to v5.1
• Effort Reporting is a hot topic and audit risk
  – UNC had an A-133 finding in 2014 for timeliness of effort certifications
  – UNC has not certified effort since the period ending June 30, 2014
  – New Effort Reporting Policy
    • Outlines an escalation process for outstanding effort statements
    • Uncertified statements will have the sponsored funding written off to the F&A account that owns the individual

• Upgraded version of ecrt has:
  – Simplified user interface
  – Detailed, effort related, transactional level payroll reports by person, project, and time period that can easily be exported to XLS
  – Reduced administrative burden for Effort Coordinators
Timeline for FY15

• Pre Review
  — January 20th – February 8th

• Certification
  — February 9th – March 9th

• Escalation
  — March 10th – April 10th

Any effort statement that has not been certified by the end of the Certification and Escalation period will have its sponsored funding removed and transferred to the F&A account of the department responsible for the individual’s HR assignment.
Retroactive Pay

Corrie Mimms

Business Analyst
• Retro pay automatically calculates for pay cycles where the employee was paid and received paychecks

• **Three Questions:**
  – Did the employee receive pay in the previous pay period(s) for which the retro is effective?
  – Was the pay received in the previous pay period(s) for the same Empl Record as the retro pay?
  – Is the Pay Frequency the same (monthly to monthly or biweekly to biweekly)?

• If all questions are “Yes” then the system will automatically pick up retro pay

• If one or more answers are “No” then a Remedy ticket is necessary
• **Exception**
  – Retro FICA exemptions on Job Earnings Distribution do not automatically calculate, therefore a Remedy ticket is required

• **Examples**
  – Maria is being hired into a paid EPA job effective January 25, 2016. This will be her first job at UNC. Maria’s Hire ePAR did not execute until after the January payroll lockout.
    • A Remedy ticket is necessary since she will not have received a January paycheck
• **Examples continued**

  – Micah should have been receiving supplemental pay on his Primary job (Empl Rec 0), but there was a delay in getting the ePAR approved.
    • As long as Micah received a paycheck during the pay periods the supplemental pay is effective, the system will automatically pay the retro

  – John is an EPA student who receives compensation for his job on Empl Rec 0. The ePAR to hire John into a secondary job with compensation (Empl Rec 1) did not execute until after the pay period it became effective.
    • A Remedy ticket is necessary since he did not receive pay from Empl Rec 1 in the previous pay cycle
Reminders

• If you are unsure or have questions, submit a ticket

• Always monitor prelim reports to ensure accurate pay

• For a dock in pay or overpayments, submit a Remedy ticket and Payroll Exception Sheet
  — Ensure employee’s Job Data is accurate before submitting ticket

• FICA retro to a previous tax year will not be adjusted
EPA/EHRA Recruitment Transition

Corrie Mimms

Business Analyst
Recruitment and Hiring Changes

• EPA/EHRA Non-Faculty, Faculty, and Postdoctoral Scholar
  — Permanent and Temporary

• PeopleAdmin: Effective January 27, 2016 EOC will no longer approve postings, interims, hiring proposals
  — EOC will continue to approve all Waiver requests

• ConnectCarolina: Effective January 27, 2016 EOC will be removed from the approval workflow for Hire actions
PA and CC Workflow Changes

• PeopleAdmin Workflow

  – **EPA/EHRA NF**: Postings, interims, and hiring proposals will route to OHR Employment
    • Hiring Proposals will continue to route to EPA NF Office
  – **Faculty**: Postings, interims, and hiring proposals will route to Academic Personnel
  – **Postdoctoral Scholars**: Postings and hiring proposals will route to VC Research
PA and CC Workflow Changes

• ConnectCarolina Workflow

– EOC will no longer approve Hire ePARs
– All EPA/EHRA NF Hires ePARs will continue to route to EPA NF Office
  • EPA Hire ePARs will not route to OHR Employment
– All Faculty Hire ePARs will route to Academic Personnel, except Faculty Zero Base Rate (CWR)
– All Post Doc Hires will route to VC Research
– Other ePAR routing will not be impacted
EPA/EHRA Recruitment Transition

- OHR Employment staff
  - Additional two new Employment Consultant (EC) positions
  - EC assignments will be changing as part of the transition
  - Updated EC assignments will be distributed in upcoming communication
  - **Reminder**: select your assigned Employment Consultant from list when submitting postings, pre-interview and interim pools, and hiring proposals
Online Help

Anita Collins

ConnectCarolina Change Management Lead
Online Help: Where can I find it?

All the content in all the ConnectCarolina training guides (all the step-by-step instructions), in a searchable form

Updated on Fridays
Online Help: Where can I find it?

You can find it two places:

A. On the CCInfo.unc.edu website
B. Inside ConnectCarolina
Online Help: Where can I find it?

A. On the ccinfo.unc.edu website

• Go to the Training > Resource Documents page

• It’s called “ConnectCarolina Actions for HR Representatives”—use the second search box to search for ConnectCarolina Actions
Resource Documents

(Qualtrics Survey is Active) These documents are provided to ConnectCarolina
users as a complement to training. If you need additional help while using
ConnectCarolina, please submit a help ticket at help.unc.edu.

For training materials to companion systems such as pCard, Web Travel,
Surplus Property Management, visit the Finance and Accounting training site.

To find a resource document, use the menus below to jump to a specific
category or type in the Search field at the top right of the table.

<table>
<thead>
<tr>
<th>Item Title</th>
<th>Type</th>
<th>Last Updated</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connectcarolina actions</td>
<td></td>
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</tr>
<tr>
<td>Item Title</td>
<td>Type</td>
<td>Last Updated</td>
<td>Description</td>
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</tr>
<tr>
<td>Connect Carolina Actions for HR Representatives Student Guide (Onyen-restricted)</td>
<td></td>
<td>6/18/2015</td>
<td>Student guide for the foundational Connect Carolina HR course.</td>
</tr>
<tr>
<td>Connect Carolina Financial Concepts: The Steps Transactions Go Through</td>
<td></td>
<td>Feb 2015</td>
<td>Each financial transaction goes through a series of steps from start to finish. Understanding what those steps are for each transaction is helpful in understanding how Connect Carolina works and in understanding the financial information you see in InfoPorte.</td>
</tr>
<tr>
<td>Queries for Reviewing Open Transactions</td>
<td></td>
<td>6/3/2015</td>
<td>Steps for running a query in Connect Carolina and the queries currently available to campus.</td>
</tr>
<tr>
<td>ePAR Overview</td>
<td></td>
<td>6/20/2014</td>
<td>Introduces the electronic Personnel Action Request (ePAR), the form used to enter all HR actions in Connect Carolina.</td>
</tr>
</tbody>
</table>
Online Help: Where can I find it?

Protected Documents

Protected Documents

PROTECTED HUMAN RESOURCES DOCUMENTS

ConnectCarolina Actions for HR Representatives – Student Guide
HR Approvals and Workflow – Student Guide
Student Actions – Class Slides
Person Creation – Student Guide
Viewing Employee Paycheck Information

WEB-BASED HELP

ConnectCarolina Web Help
Welcome to Online Help

We hope you find the Help you need in this online reference.

To find information on these pages, click on the books and pages on the left. When you click on a book or topic, the information comes up in this pane.

To move around inside this app, hover over the navigation buttons above. The tool tips will let you know what that button does.

Here are some other resources you might find helpful

- UNC-Chapel Hill Human Resources
- UNC-Chapel Hill Finance Division
- ConnectCarolina Support Desk
- ConnectCarolina User Information
Online Help: Where can I find it?

B. Inside ConnectCarolina

- Top right corner of most screens

- **EXCEPT** the home page
Online Help: Where can I find it?

The help opens in its own window or browser tab.
Online Help: How do I use it?

Two key ways: Table of Contents and Searching

Here are some other resources you might find helpful:

- UNC-Chapel Hill Human Resources
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Here are some other resources you might find helpful

- [UNC-Chapel Hill Human Resources](http://www.unc.edu)
- [UNC-Chapel Hill Finance Division](http://www.finance.unc.edu)
- [ConnectCarolina Support Desk](http://www.connectcarolina.com)
- [ConnectCarolina User Information](http://www.userinformation.com)
About Employee Status Changes

An employee's status is a key factor in processing pay and benefits for the employee. An employee's pay and benefits may be impacted by the status change action and reason. When you process a status change, you specify an action and a reason. The action is the status change you're making, while the reason is the situation causing the action.

The possible employee status changes are:

- Leave of Absence (see Entering a Leave of Absence)
- Return From Leave (see Entering a Return from Leave)
- Termination (see Entering a Termination)

For more information regarding leaves and separation for an employee group, see the Human Resources Policies, Procedures & Systems website.

The Process Status Changes Go Through

All status changes in ConnectCarolina begin when you, as
Online Help: How do I use it?

Home – brings you back to the Welcome page.
Refresh
Print
Add topic to favorites – saves you from having to search for the topic
Hide Navigation
Back
Forward
Previous Topic
Next Topic
You are entering a lump sum payment ePAR and you are unclear about what date you need to enter in the Effective Date field.

- Click on the Help link in the top right corner of most screens
Online Help: How do I use it?

- Click on the Human Resources chapter in the Table of Contents
- Click the ‘Submitting Lump Sum Payments’ topic
- Scroll down through the information to the table that defines effective date

Note: You may review the employee's UNC Employee Information in advance to ensure which employee record to select. See Viewing Employee Information

7. Complete the fields in the Lump Sum Details section:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>Enter the first day of the pay period the lump sum payment will be paid out. For negative lump sum payments, enter today's date as the effective date.</td>
</tr>
</tbody>
</table>

Notes:
- For employees that are paid monthly, the negative lump sum payment will cycle, unless the effective date is in the last week of the month. In that case, it will be deducted from the next month's payroll.
You are entering a secondary job for an EPA employee and not sure what FTE to use on the Hire ePAR form.

• Click on the Help link in the top right corner of the screen
Online Help: How do I use it?

- Click on the Human Resources chapter in the online help
- Click the ‘Entering a Secondary Position’ topic
- Scroll down for information about FTE for EPA secondary jobs
Welcome to Online Help

We hope you find the Help you need in this online reference.

To find information on these pages, click on the books and pages on the left. When you click on a book or topic, the information comes up in this pane.

To move around inside this app, hover over the navigation buttons above. The tool tips will let you know what that button does.

Here are some other resources you might find helpful

- UNC-Chapel Hill Human Resources
- UNC-Chapel Hill Finance Division
- Carolina Support Desk
- Carolina User Information
You want to check on a PAAT adjustment to see where it is in the approval process. You’re not sure which PAAT report shows you this.

- Click the Help link
Online Help: How do I use it?

• Click on the Search function in the bottom left corner, then type PAAT in the Search field and click Search.

Next, click on a title in the search results to see information on that topic on the right side of your screen.
### Running PAAT Reports

#### Overview

There are three PAAT reports available:

- **Review Pending Transactions**: The link to this report is in the HR WorkCenter in ConnectCarolina. This report provides a list of all pending transactions for a department or school, including those with In Progress and Needs Approval statuses. Each transaction listed has a link to the adjustment.

- **Current Suspense Charges**: The link to this report is also in the HR WorkCenter in ConnectCarolina. This report provides a list of charges for a department or school that have gone to the suspense account, broken down by employee and pay period.

- **Labor Expense Report**: This report is located in InfoPorte, in the HR application, on the Payroll tab. This report mirrors the Labor Expense Report that was available in the Retroactive Funding Transfer Application (short term retro tool).
A Note on the PeopleBooks

Click here to access the PeopleBooks technical documentation provided by Oracle for PeopleSoft. Please note that this documentation is not specific to ConnectCarolina and assumes technical proficiency with PeopleSoft. For topics specifically related to ConnectCarolina, please see the other chapters in this help system.
Reminders

Corrie Mimms

Business Analyst
HR Reminders

Reports To and Supervisor ID

• All employees must report to a position or Empl ID

• Removing Reports To:
  — Submit Position ePAR to remove Reports To
  — After ePAR executes, submit an Edit Existing Job ePAR to add Supervisor ID
    o Use the same effective date used to remove Reports To

• Do not start the Edit Existing Job ePAR until the Position ePAR has executed

• Individuals who are not in positions or individuals who report to a Supervisor can have updates made on Edit Existing Job
Termination vs Transfer

- Termination and hire/transfer actions drive reporting, benefits, and compliance

- If an employee is moving from one job to another without a break in service, the receiving department should submit a Transfer action via the Hire ePAR
  - A weekend is not considered a break in service
  - Use Edit Existing Job checkbox to select which Empl Rec and Job the employee will transfer from
  - **Reminder**: do not check the Edit Existing Job checkbox until you have completed all other fields on the first page of the hire ePAR
Termination vs Transfer continued...

• If there is a break in service between jobs, then a termination action is required
  — Current department submits the termination action
  — After termination has executed, receiving department submits Hire ePAR

• If a termination action has been entered in error, submit a Help ticket to have the termination backed out
Termination ePARs

- Terminating employees with multiple jobs
  - Review Multiple Jobs Summary or UNC Employee Information
    - Are there other active jobs? Do all jobs need to be terminated?
    - What are the Expected Job End Dates? (information can also be found in InfoPorte)
  - Submit termination actions at the same time
  - If applicable, notify secondary departments of termination/resignation
  - Termination effective dates cannot be greater than Expected Job End Date
    - If the termination effective date is after the expected end date, first submit an Edit Existing Job ePAR to adjust the end date
**FTE and Compensation Changes**

• **When an employee is in a position** *timing is key*
  
  — Submit the Position ePAR to change the FTE first and let it execute
  
  — Then, submit the corresponding compensation change via the Edit Existing Job ePAR using the same effective date

  o **Do not start the ePAR until the position action has executed**
    
    – If the Edit Existing Job ePAR is started early, the FTE will revert back
  
  o **If the pay rate change action is not completed the employee will be over or underpaid**

  o **The pay rate action does not need to be submitted if the employee is paid hourly, however be sure to include the funding grid in the Position action so the department budget table will adjust accordingly**
FTE and Compensation Changes

• When an employee is not in a position:
  — Submit an Edit Existing Job ePAR and update the FTE and Compensation on the same action

• To move an employee to a Zero Base FTE / Zero Salary, submit a Hire action and transfer the employee
  — Cannot set compensation to zero via the Edit Existing Job ePAR
Position Information

- SPA/SHRA Positions
  - One-to-one ratio: one employee per position
  - Vacant positions may be re-used

- EPA/EHRA Positions
  - Recommend one-to-one ratio, but not required
    - Job Code, Hours, Rate/Compensation, Funding Distribution must be identical for positions with multiple headcount
    - If an individual in a multiple headcount position is a supervisor, must use Supervisor ID for the employee vs Reports To
  - Positions are not required for EPA Students
HR Reminders

General Reminders

• Include comments in ePARs

• Lump Sum Payment effective dates
  — Use the first day of the pay period that the LSP should be paid out
  — If retro, use the first day of the current/open pay period

• Approvers - review ePAR fields for accuracy

• Be mindful of midstack actions

• If FTE is greater than 1.09 be sure to coordinate with other departments
PAAT Reminders
Online Tax Form Reminders
Distribution of 2015 W2s

Brian Simet
Payroll Director
• PAAT Reminder
  – If you have not done so, please complete online training found at
    • [http://www.unc.edu/connectcarolinacbt/courses/PAAT/index.html](http://www.unc.edu/connectcarolinacbt/courses/PAAT/index.html)
      – Only takes 27 minutes

• Online W4 and NC4 forms
  – Now available 24 x 7
  – Will provide employee a sense of what payroll it will be reflected
  – We do not care how many times an employee changes their withholding status.
  – Not available to Employees with a lock-in letter and Non-Resident Aliens
Distribution of 2015 W2s (cont’d)

• Will occur the week of January 25th
  — Active employees
    o Delivered to primary department
    o Available via Self-Serve beginning February 1st
  — Inactive
    o Mailed to last home address on file
    o Available via Self-Serve using Guest ID Access
Distribution of 2015 W2s (cont’d)

• Associated FAQs
  — Will be distributed with W2s
  — Will be permanently posted on our website

• Requests for Duplicates
  — Will be addressed beginning Monday, February 15th
Form 1095C - Employer-Provided Health Insurance Offer and Coverage

- Benefits Office responsible for distributing.
- Will be distributed by IRS extended deadline of March 31, 2016
- Questions should be referred to benefits@unc.edu
Questions?