

HR User Group Meeting

January 20, 2016



Topic	Presenter	Time
Effort Reporting	Marty Bergerson	5 min
Retroactive Pay	Corrie Mimms	5 min
EPA Recruitments and Hires	Corrie	5 min
Online Help	Anita Collins	15 min
Various HR Reminders	Corrie	10 min
PAAT Reminders	Brian Simet	5 min
Online Tax Forms Reminder	Brian	5 min
Questions		10 min



Effort Reporting

Marty Bergerson

Manager, Huron Consulting Group

ecrt_help@unc.edu

- 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

- **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

- **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

- **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

A. On the ccinfo.unc.edu website

- Go to the Training > **Resource Documents** page



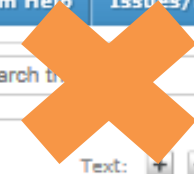
- It's called "ConnectCarolina Actions for HR Representatives" — use the **second search box** to search for **ConnectCarolina Actions**



- Home
- Finance
- HR/Payroll
- Student
- Research
- Reporting
- Training
- Access
- User Groups
- System Help
- Issues/Fixes

Home » Training » Resource Documents

Search



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.

Media Type

- PDF Document
- Excel Spreadsheet
- Computer-Based Training
- Video or Webinar
- Slideshow

Click on the "Item Title" field to access a resource.

Finance Categories

HR/Payroll Categories

Reporting Categories

Student Admin Categories

Jump to a category:

Approving F ▼

Jump to a category:

Employee F ▼

Jump to a category:

Finance Ref ▼





Jump to a category:

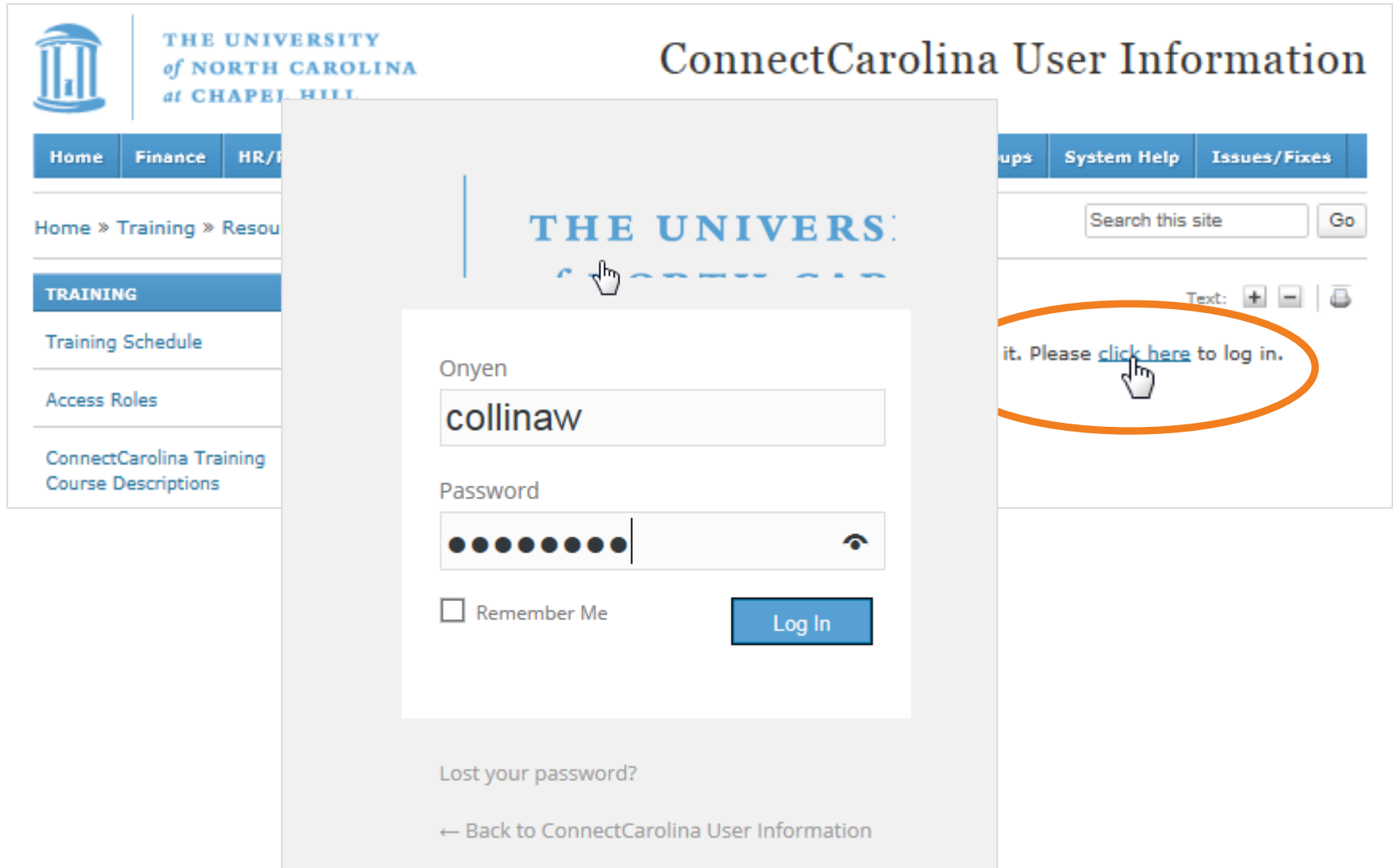
Student Act ▼

Search:

Item Title	Type	Last Updated	Description
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Search: x

Item Title	Type	Last Updated	Description
ConnectCarolina Actions for HR Representatives Student Guide (Onyen-restricted)		6/18/2015	Student guide for the foundational ConnectCarolina HR course.
ConnectCarolina Financial Concepts: The Steps Transactions Go Through		Feb 2015	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 ConnectCarolina works and in understanding the financial information you see in InfoPorte.
Queries for Reviewing Open Transactions		6/3/2015	Steps for running a query in ConnectCarolina and the queries currently available to campus.
ePAR Overview		6/20/2014	Introduces the electronic Personnel Action Request (ePAR), the form used to enter all HR actions in ConnectCarolina.



THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

ConnectCarolina User Information

Home Finance HR/...

Home » Training » Resou...

TRAINING

- Training Schedule
- Access Roles
- ConnectCarolina Training Course Descriptions

Groups System Help Issues/Fixes

Search this site Go

Text: + - |

it. Please [click here](#) to log in.

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Password
●●●●●●●● |

Remember Me **Log In**

Lost your password?

← Back to ConnectCarolina User Information

Home » Training » Resource Documents » Protected Documents

TRAINING

- Training Schedule
- Access Roles
- ConnectCarolina Training Course Descriptions
- Resource Documents
 - Protected Documents

Protected Documents

Text:

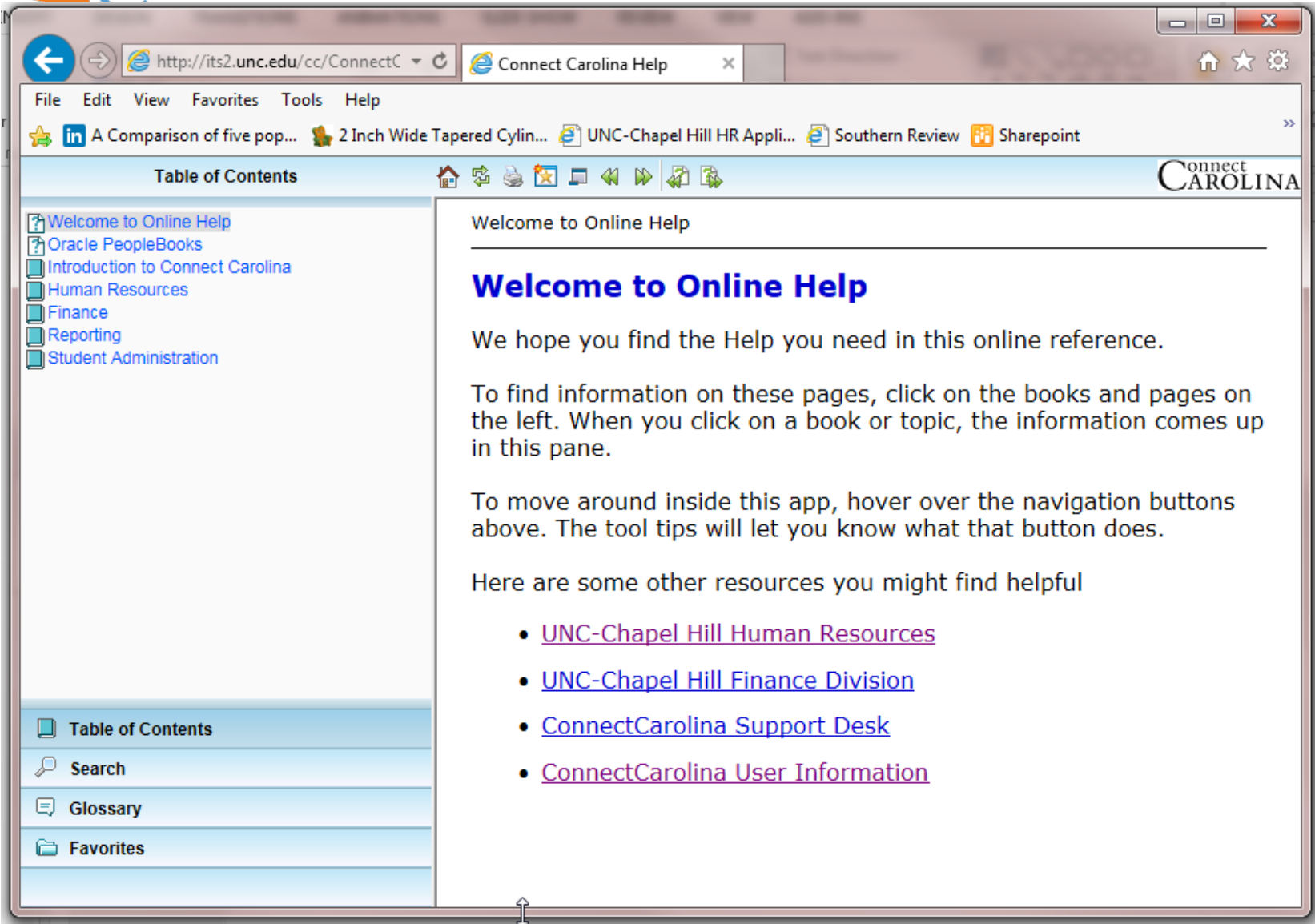
PROTECTED HUMAN RESOURCES DOCUMENTS

- 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

Online Help: Where can I find it?



B. Inside ConnectCarolina

- Top right corner of most screens

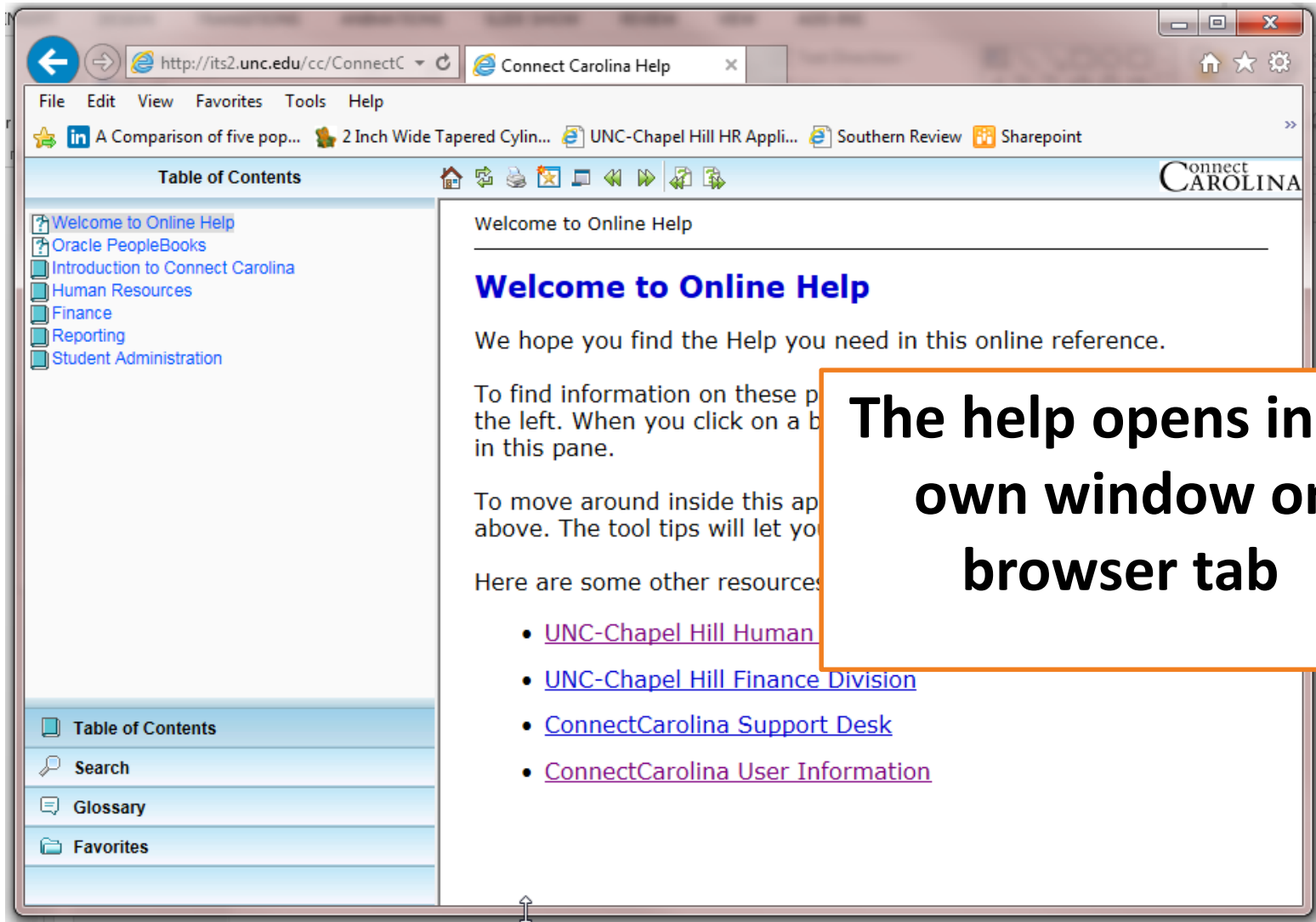
ht Collins, Welcome!

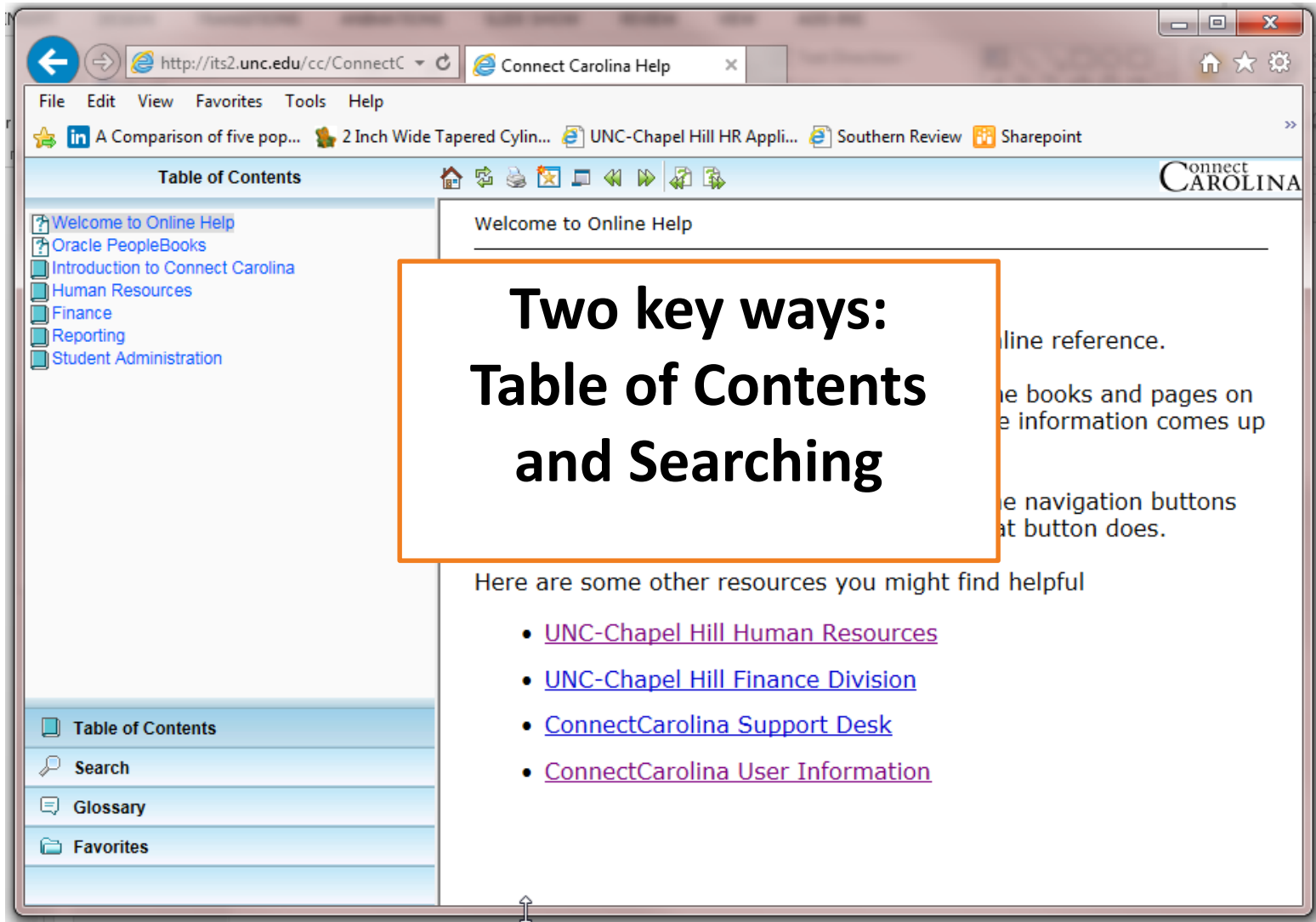
Home | Add to Favorites | Sign out

New Window | **Help** | Personalize Page

- **EXCEPT** the home page

Online Help: Where can I find it?





**Two key ways:
Table of Contents
and Searching**

Table of Contents

- Welcome to Online Help
- Oracle PeopleBooks
- Introduction to Connect Carolina
- Human Resources
- Finance
- Reporting
- Student Administration

Search

Glossary

Favorites

Welcome to Online Help

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](#)

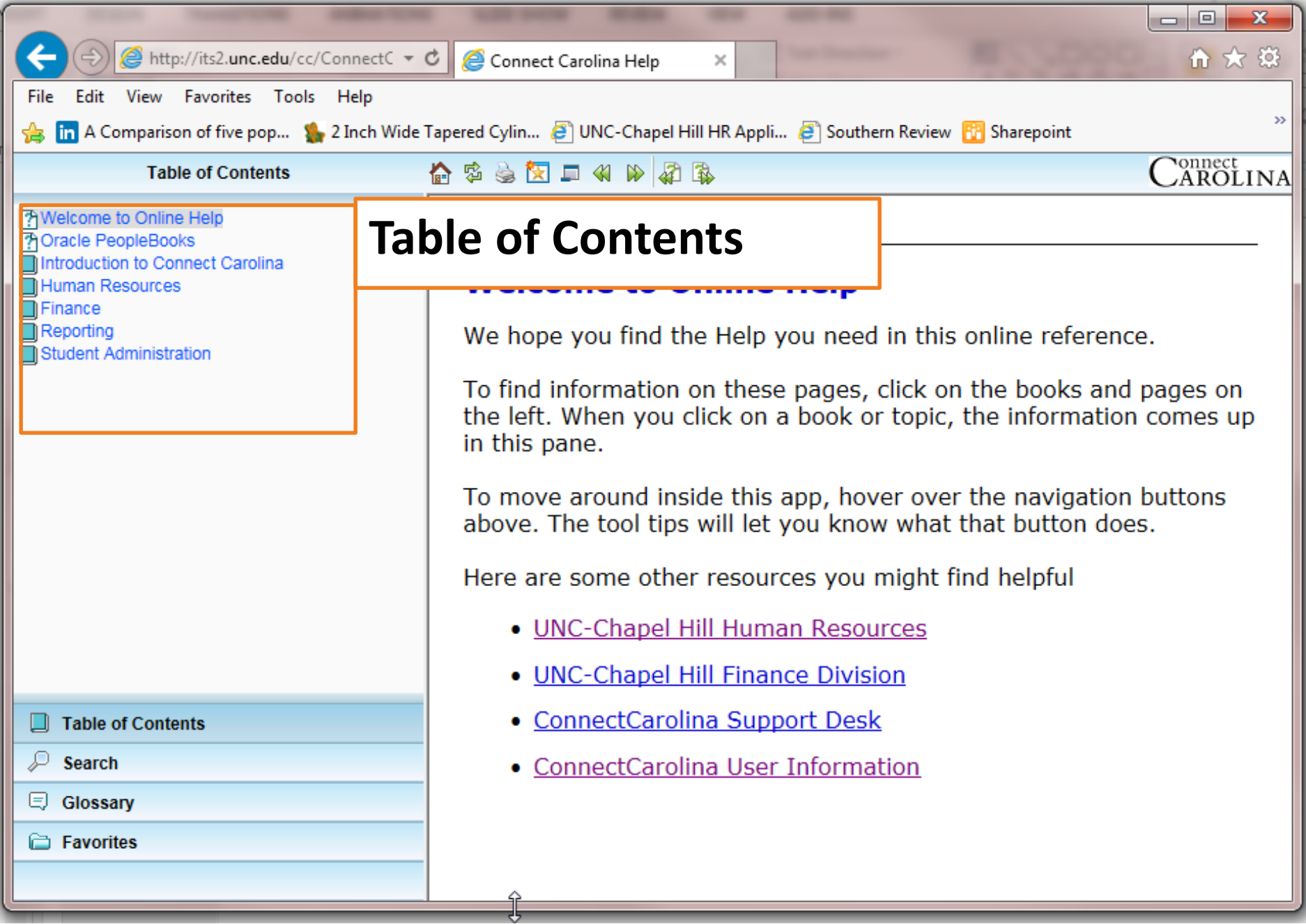


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We hope you find the Help you need in this online reference.

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.

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- Managing Positions
- Hiring or Rehiring Employees and Faculty
- Changing an Employee's Status
 - Entering a Leave of Absence
 - Entering a Return From Leave
 - Entering a Termination
- Updating Job Record Information
- Making Funding Swaps
- Submitting Lump Sum Payments
- Entering Affiliates
- Person Creation
- Faculty Events
- Learning Management
- Student Actions
- Attaching Documents to an ePAR Form
- PAAT
- Finance
- Reporting

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



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.

Favorites ▾ Main Menu ▾ > HR WorkCenter > ePAR Home Page

HR WorkCenter

HR/Payroll Benefits Reports/Queries

HR/Payroll

Approve/Review Actions
ePAR Home Page

Hiring
PeopleAdmin
LawLogix
Find Existing PID

New Window ? Help Pers

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.

[Awaiting Approvals Inbox](#)

- Click on the Help link in the top right corner of most screens

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 - Making Funding Swaps
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 - Attaching Documents to an ePAR Form
 - PAAT

Note: You may review the employee's UNC Employee Information in advance unsure which employee record to select. See [Viewing Employee Information](#)

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

In this field:	Do the following:
Effective Date	<p>Enter the first day of the pay period the lump sum payment will be paid out.</p> <p>For negative lump sum payments, enter today's date as the effective date.</p> <p>Notes:</p> <ul style="list-style-type: none"> 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.

- 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

You are entering a secondary job for an EPA employee and not sure what FTE to use on the Hire ePAR form.

Favorites > Main Menu > HR WorkCenter > ePAR Home Page

HR WorkCenter

HR/Payroll Benefits Reports/Queries

HR/Payroll

Approve/Review Actions
ePAR Home Page

Hiring
PeopleAdmin
LawLogix
Find Existing PID

New Window ? Help Pers

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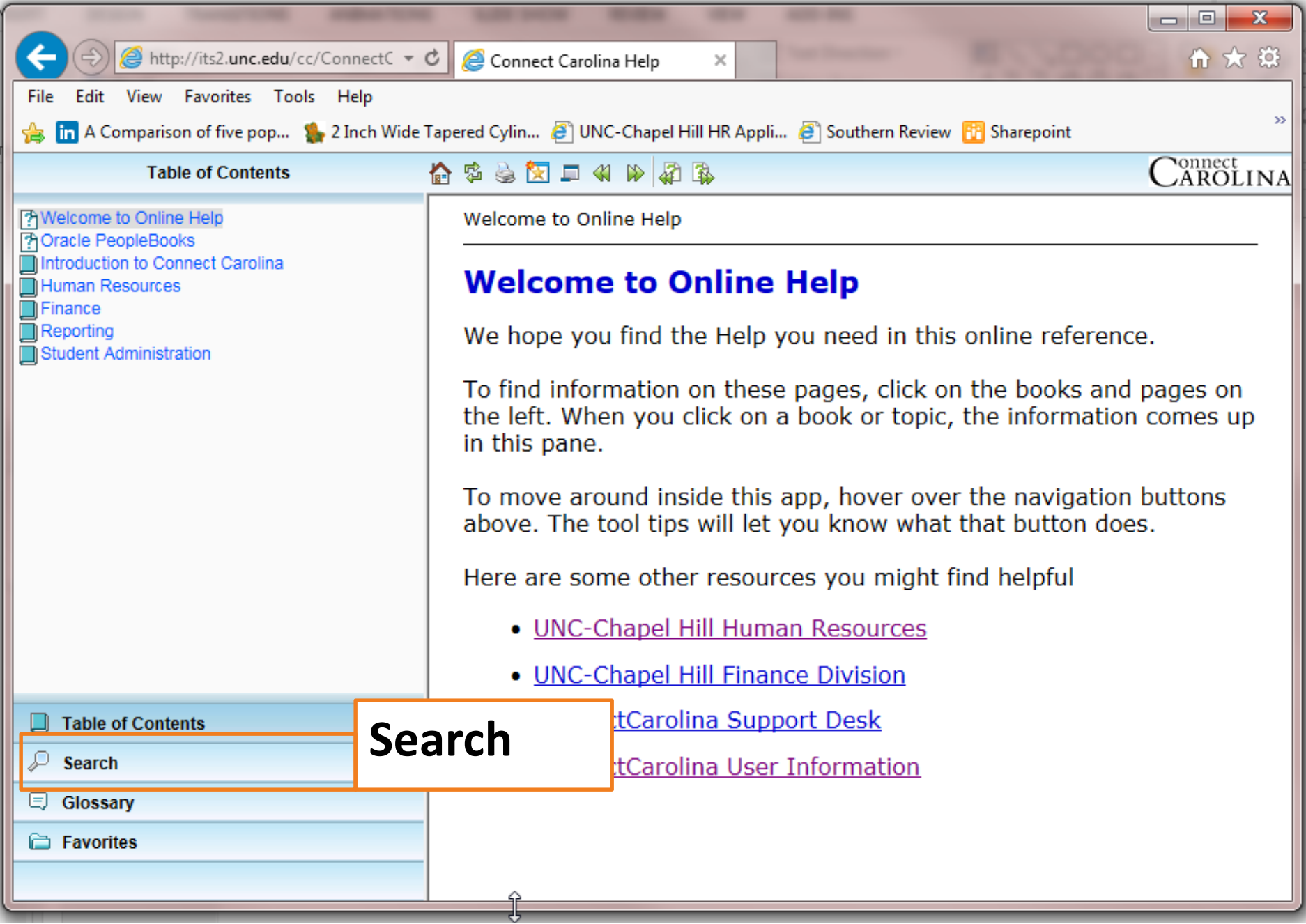
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 - Entering a Faculty Hire or Rehire
 - Entering an EPA Non-Faculty Hire or Rehire
 - Entering an SPA Permanent Hire or Rehire
 - Entering an SPA Temporary Hire or Rehire
 - Entering an EPA Non-Faculty Transfer
 - Entering a Secondary Position**
 - Changing an Employee's Status
 - Updating Job Record Information
 - Making Funding Swaps
 - Submitting Lump Sum Payments
 - Entering Affiliates
 - Person Creation

The University allows the following secondary job situations:

Primary Job:	Secondary Job:
Faculty	Faculty
Faculty	EPA Non-Faculty
EPA Non-Faculty	Faculty
EPA Non-Faculty	EPA Non-Faculty
SPA Temporary or Student	SPA Temporary or Student
EPA Student	SPA Temporary or Student

For EPA employees, all FTE and base salary is aggregated onto the primary job. Secondary jobs can reflect supplemental pay, if applicable, but all secondary jobs will have .01 standard hours, which is equal to 0 FTE.

- 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



Search

Welcome to Online Help

Welcome to Online Help

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- [UNC-Chapel Hill Finance Division](#)

[Connect Carolina Support Desk](#)

[Connect 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

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

Search

PAAT Search

Rank	Title
1	Entering and Approving a Payroll
2	Running PAAT Reports
3	Managing Payroll Accounting Adju

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Search

Glossary

Favorites

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

Search
Connect CAROLINA

Rank ▲	Title
1	Entering and Approving a Payroll Acc
2	Running PAAT Reports
3	Managing Payroll Accounting Adjustm

Finance > **PAAT** > Running **PAAT** Reports

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

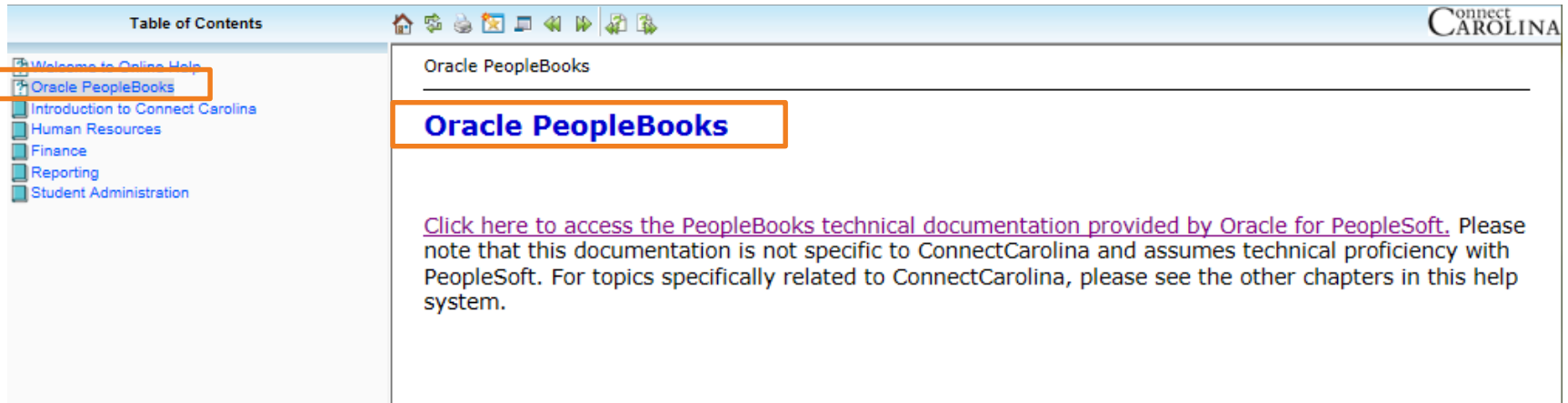


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Oracle PeopleBooks

Oracle 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.



Add to Favorites bar

- Welcome to Online Help
- Oracle PeopleBooks
- Introduction to Connect Carolina
- Human Resources
- Finance
- Reporting
- Student Administration

ORACLE

PeopleSoft Online Help

This site features the HTML install of our Applications 9.0, and PeopleTools 8.49, 8.50, 8.51, 8.52, 8.53 and 8.54 online as well as the current Glossary of PeopleSoft Enterprise Te



Reminders

Corrie Mimms

Business Analyst

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
 - 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
 - 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
 - If the pay rate change action is not completed the employee will be over or underpaid
 - 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

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>
 - 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
 - Delivered to primary department
 - Available via Self-Serve beginning February 1st
 - Inactive
 - Mailed to last home address on file
 - 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?