



Connect
CAROLINA



HR/Payroll



Affiliates Report

VERSION: 2/22/2017

Affiliates Report

Purpose of This Report

The Affiliates Report shows information on all active affiliates or affiliates who were terminated within the last year. You can see and filter by the following information:

- affiliates name
- employee ID number (PID)
- department
- status
- the sponsor's name
- affiliate type
- effective date
- end date

Who Uses This Report

If you have access to create HR funding, student, or affiliate actions or if you are an HR representative, you will automatically be given access to this InfoPorte report.

When to Use This Report

You can use this report anytime you need to check the status of an affiliate.

Where Information Comes From

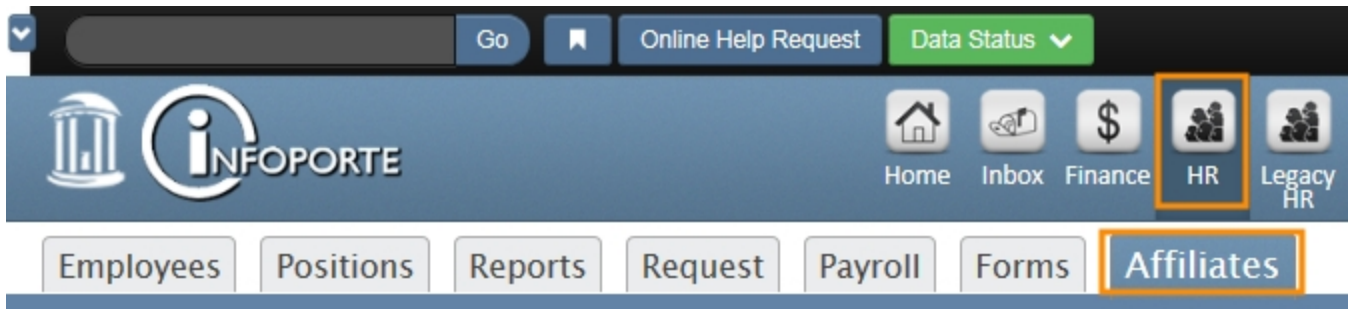
Information for this report is pulled nightly from ConnectCarolina. The source of this information is the Affiliate ePAR. Affiliates are also known as POI (person of interest).

Where to Find This Report

Follow these steps to run the Affiliates Report:

1. Choose this menu option:

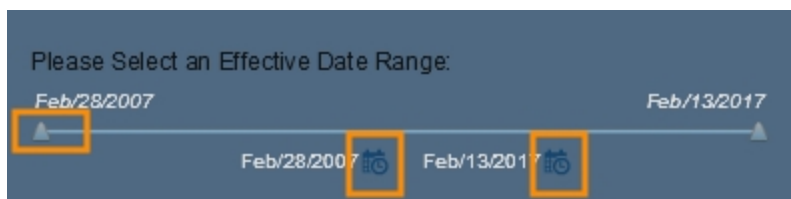
InfoPorte > HR > Affiliates



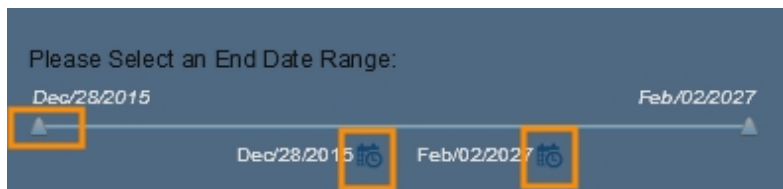
2. Do any of the following:

- If you want to see the report based on the effective date, slide the arrow on the date line of the **Effective Date Range** field.

Note: Anytime you see the clock/calendar icon, you can click on the icons to select the date from a monthly view.



- If you want to see the report based on the end date, slide the arrow on the date line of the **End Date Range** field.



- If you want to see the report based on a specific employee, you can enter the employee's name in the **Name** field.

- If you want to see the report based on a specific employee, you can enter the employee's ID (PID) in the **Employee ID** field.

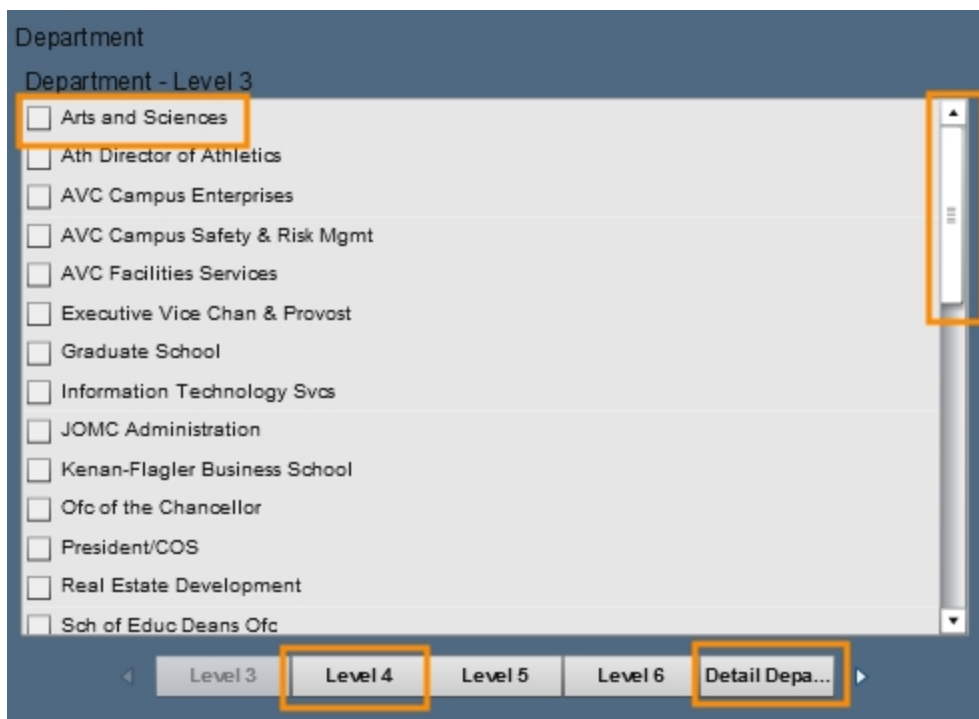
- If you want to see a specific affiliate type, select the **Affiliate Type** from the drop down menu:

Affiliate Type	Affiliate Description
AHEC Affiliate	AHEC professionals needing access to the AHEC system housed at Carolina.
Campus Ministries	Ministers and staff of Campus Ministries, Campus Crusades, and NC Hillel.
Carolina Club Employee	Employees of the Carolina Club.
Carolina Dining Employee	Employees of the Carolina Dining Services.
Committee/ Board Member	A person who is serving on a Committee or Board (not a Board of Trustees).
EHS Associate	Affiliates that need to take Environmental, Health and Safety training and are not coming through a UNC department.
Emergency Official	External Emergency Officials who need access to the Campus Alert System.
Emeritus Faculty	Retired from a paid faculty position in the department.
External Employee	Employees whose department's budget does not fall under payroll, but have a close affiliation.
Fellow-Unpaid	Affiliates who receive funding from an external fellowship and are working with the University.
Friday Center Staff	Faculty working for the Friday Center and are not paid for by the University or associated with Carolina, except through work with the Friday Center (i.e. faculty from other universities that are teaching through the Friday Center and credit it giving through the other Universities.)

Hospital Associates	A staff member who is paid by the hospital, but works on the University side, needing access to finance systems.
Independent Contractor	A person not working for a company, but independently under contract with the University.
Intern	Individuals who meet one of the following circumstances: <ul style="list-style-type: none"> • Are currently enrolled at UNC-Chapel Hill or other accredited colleges, universities, community colleges or high schools and who are engaged in experiential learning in the workplace in return for academic or course credit. • Are obtaining work experience that is required for professional licensure or certification under the supervision of a licensed or certified professional (such as social workers, engineers, nurses, and accountants) for a period not to exceed 18 months in duration. • Are engaging in experiential learning in a profession under the supervision of an appropriate University supervisor or manager for a period not to exceed 18 months.
Other Affiliate	A person who does not fit into any of the other categories.
Other Contractor/ Consultant	A person who is employed or paid by an external company or source.
Preceptor	A practicing professional who gives personal instruction, training, and supervision to a student or young professional.
Research Collaborator	An individual who is collaborating on UNC department or UNC faculty-driven research.
Retiree	A person who is retired from a paid position in the department.
Student Grants PI	Current students who need finance access because they are also Principal Investigators for a grant.
Summer Group	A group that is only on campus for part or all of the summer, but who are not students of the University.
UNC Trustee	A member of the UNC Board of Trustees.
University Temp Services Employee	A temporary employee working through University Targeted Staffing.
US Environmental Protection Agency	An employee of the US Environmental Protection Agency (EPA) who is working on capus or who requires access for Institutional Review Boards (IRB) studies.

Visiting Scholar	<p>A person who:</p> <ul style="list-style-type: none"> • holds an appointment at another academic or research institution. • is visiting to work with a particular faculty member or principal investigator on a research project • does not hold a paid appointment at UNC-Chapel Hill
Volunteer	A person who offers services without cost to the University for civic reasons and the services are not typically performed by permanent University employees.

- If you want to see affiliates for a specific department, you can select departments by doing one of the following:
 - checking the box next to the department name.
 - using the slide bar to view more department choices.
 - selecting different levels to view more department options.
 - selecting a department by department number click on **Detail Depa...** next to the Level buttons.



Results Shown on the Affiliates Report

The Affiliates Report shows the following information:.

In this column:	You see this...
Employ...	The affiliate's ID (PID) number.
Employee Name	The name of the affiliate.
Dept. ID	The affiliate's home department number.
Dept. Desc.	The affiliate's home department description.
Affiliate Status	The affiliate's status as either active or inactive.
Sponsor Name	The person responsible for the affiliate.
Aff. Type	The type of affiliate, such as a University Temp Services employee or a retiree.
Effective Date	The first day the person is considered an affiliate.
End Date	The last day of the person is considered an affiliate.

Sample of the Affiliates Report

Employ... ▲	Employee Name	Dept. ID	Dept. Desc.	Affiliate Status	Sponsor Name
7000000x	Trainfeld, Donald William	260102	OHR-Benefits Services	Active	Trainer, Carolyn
70000001x	Trainfeld, Donald William	260100	OHR-Human Resour...	Active	McTrain, Thomas
70000002x	Trainwell, Scott	631200	FPG Child Develop...	Active	Tairners, Maya
70000004x	MacTrain, Angela	380100	SW-School of Socia...	Active	Trainmac, Benjamin

Aff. Type	Effective Date	End Date
Retiree	04/01/2015	04/01/2025
Retiree	08/08/2011	08/08/2021
Retiree	09/15/2014	09/15/2024
Preceptor	08/29/2016	08/28/2017