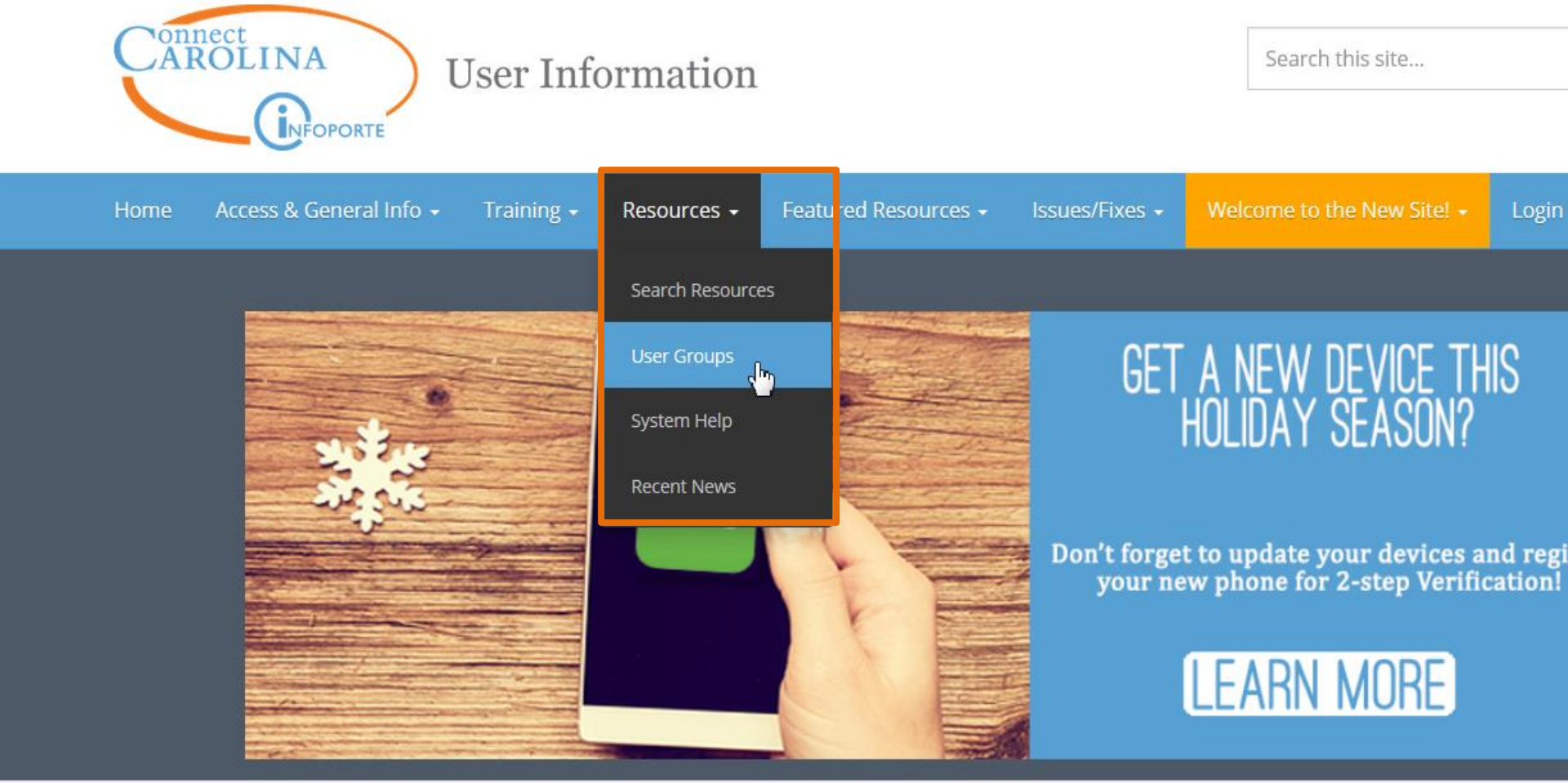
HR User Group Meeting

February 22, 2017

Connect CAROLINA

INFOPORTE



CCinfo.unc.edu

Resources

Search Resources

User Groups

System Help

User Groups

User Groups Meeting Schedule

Can't make it to a meeting? Join us online.

Click here to view a Finance topic webinar live (at times below)

Click here to view an HR/Payroll topic webinar live (at times below)

Webinar tips and help

Area	Date/Time	Location
HR User Group Meeting	February 22, 2017 at 10:00am	Dey Hall, Toy Lounge or Webinar link

Agenda

Topic	Presenter
Upcoming Projects List	Vicki Bradley
Affiliates Report	Ann Sager
Salary Funding Report	Rebecca Jones
Performance Management	Corrie Mimms and Tyler Enlow
Negative Lump Sum Payments	Corrie Mimms
Retro and Late Actions	Vicki Bradley

Upcoming Projects

Vicki Bradley

Director, OHR

ConnectCarolina Projects (Jan-June,2017)

Area	Project
HR - Campus Solutions	Person Updates Associated with CS 9.2 upgrade
Benefits	Benefits Max Program Option Process Retrofits
Benefits	Benefits Statements On-line
eForms	Electronic Personnel Action Request Form Improvements
HR	2017 Organizational Changes
HR	2017 SHRA work period changes
HR	2017 UNC GA Data mart enhancements
HR	Affirmative Action Plan 2016/2017 Reporting
HR	Automate ACA Reporting
HR	Automated Supervisor Mass-Update Process
HR	CLERY Act
HR	Database Compliance Enhancements

Area	Project
HR – E&MR	Performance Management
Learning Management	Learning Management Enhancements
Payroll	2016 W2 Processing
Payroll	MultiState Compliance
Payroll	Paystub Modifications
Commitment Accounting	Long Term Solution for Salary and Benefit Projections
Commitment Accounting	Salary Funding Report
Commitment Accounting	Update Department Budget Table (DBT) with Suspense
Reporting	HR Additional employee info field phase 1
Reporting	HR Additional employee info field phase 2
Reporting	HR Affiliates Report
Reporting	Revised and additional employee info view on infoporte

ConnectCarolina Project Prioritization

- Established a process to prioritize larger project requests across all areas of ConnectCarolina
  - Ensure limited resources are focused on most pressing issues

- Project Request Form Includes:
  - Description of new/modified functionality
  - Information so proposed work can be prioritized based on a variety of factors including Institutional Risk, Urgency, Impact, Strategic Goal, Efficiency, Complexity and Service Type

ConnectCarolina Project Prioritization

- Process
  - Projects are identified from a variety of mechanisms (Remedy tickets, business process improvements, mandates, etc.)
  - Vetting of discretionary projects
  - Business Owners work with Business Analysts to complete the form
  - The project is considered amongst other HR/Payroll projects and then brought to the ConnectCarolina Executive Committee for prioritization amongst projects from all modules
  - Programs brought to the Executive Sponsors

Affiliates Report

Ann Sager
HR Business Analyst

Affiliates

You asked and we are going to deliver:

- All Basic, Student, and Complex originators will have access to view the data

- You can use this to monitor your Affiliates' end dates (avoid lapse in enrollment)

Filter on:

- Employee ID
- Affiliate Type
- Affiliate Status (active or inactive)
- Departments
- Start and End Dates

Affiliates

Infoporte – Support System

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms | Affiliates

Please Select an Effective Date Range:

Nov/28/2005 — Jan/10/2017

Nov/28/2005 Jan/10/2017

Please Select an End Date Range:

Dec/27/2013 — Jan/05/2027

Dec/27/2013 Jan/05/2027

Name

Employee Name

Employee ID

Employee ID

Affiliate Type

Aff. Type

Affiliate Status

Active (7,614)

Department

Department - Level 3

- Arts and Sciences
- Ath Director of Athletics
- AVC Campus Enterprises
- AVC Campus Safety & Risk Mgmt
- AVC Facilities Services
- Executive Vice Chan & Provost
- Graduate School
- Information Technology Svcs
- JOMC Administration
- Kenan-Flagler Business School
- Ofc of the Chancellor
- President/COS
- Real Estate Development
- Sch of Educ Deans Ofc

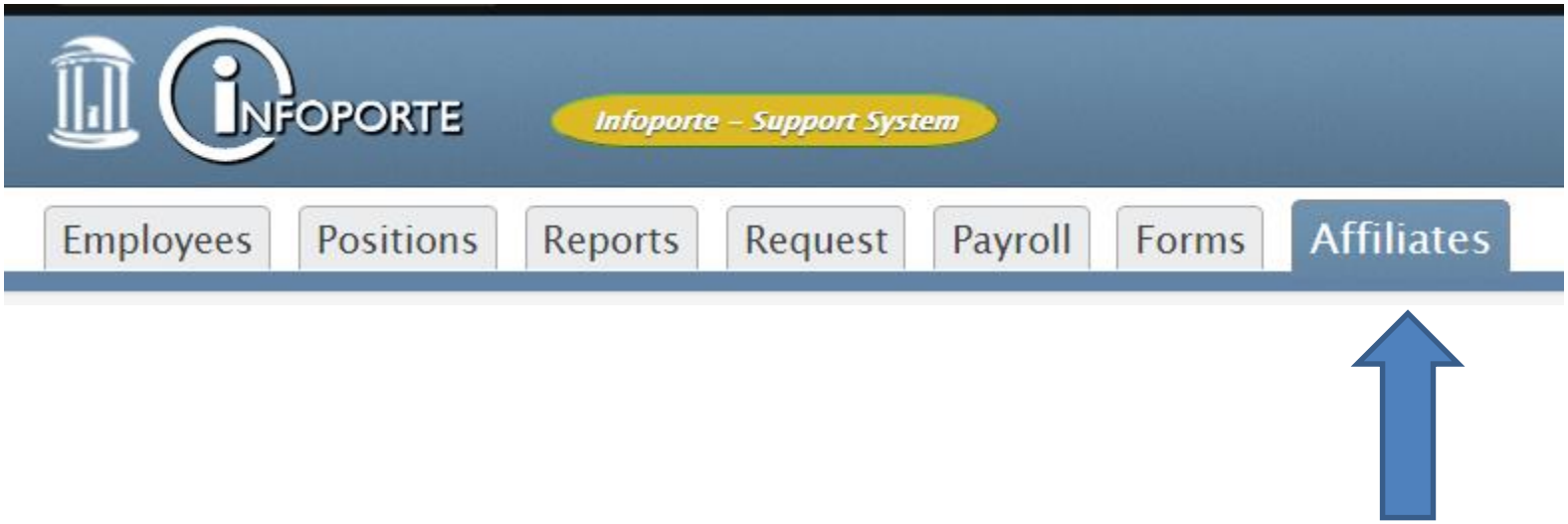
Level 3 | Level 4 | Level 5 | Level 6 | Detail Depa...

Employee ID	Employee Name	Dept. ID	Dept. Desc.	Affiliate Status	Sponsor Name	Aff. Type	Effective Date	End Date
730065040	Mcneill,Erica Latoya	214300	Finance Business An...	Active	Burke,Robin C	Other Contractor/Consul...	May/27/2015	Jan/31/2016
704256310	Skeen,Kim M	214300	Finance Business An...	Active	Burke,Robin C	Other Contractor/Consul...	May/27/2015	Aug/31/2016
730059495	Medlin,Donna	214300	Finance Business An...	Active	Burke,Robin C	Other Contractor/Consul...	Mar/05/2015	Aug/31/2016

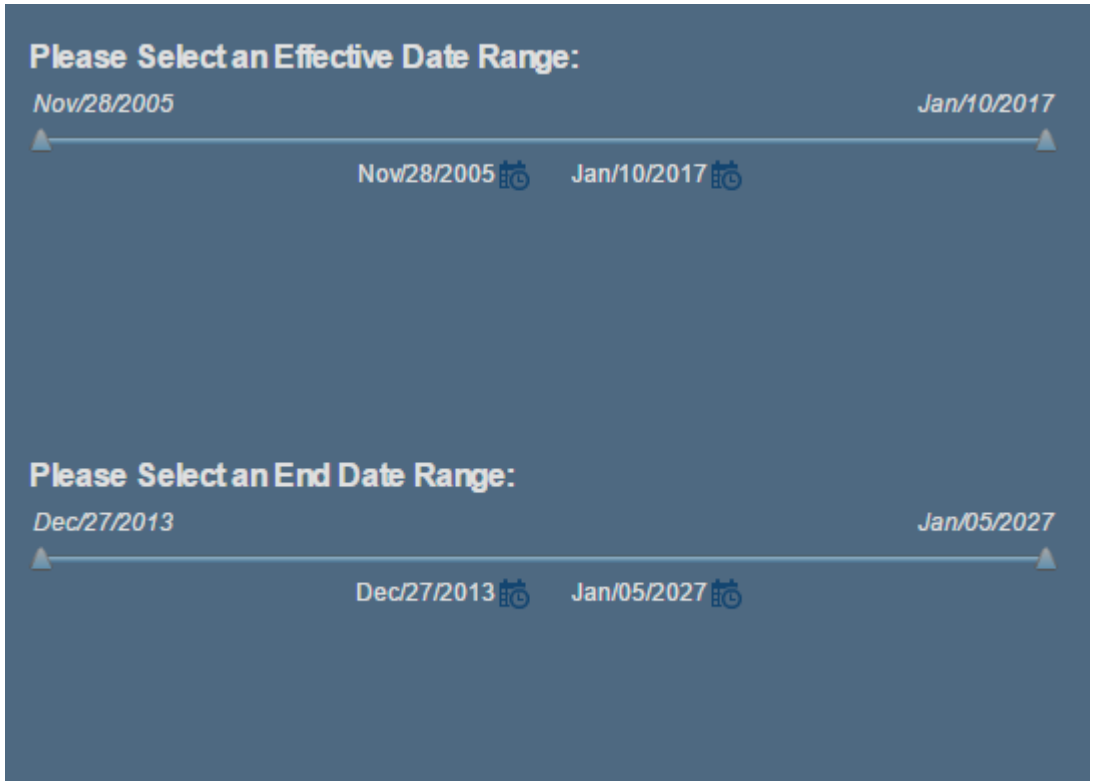
Too small….

Affiliates


Home
Inbox
Finance
HR
Tools
Cores


INFOPORTE
Infoporte – Support System
Employees
Positions
Reports
Request
Payroll
Forms
Affiliates

Affiliates



You can filter on effective dates

You can filter on end dates

Affiliates

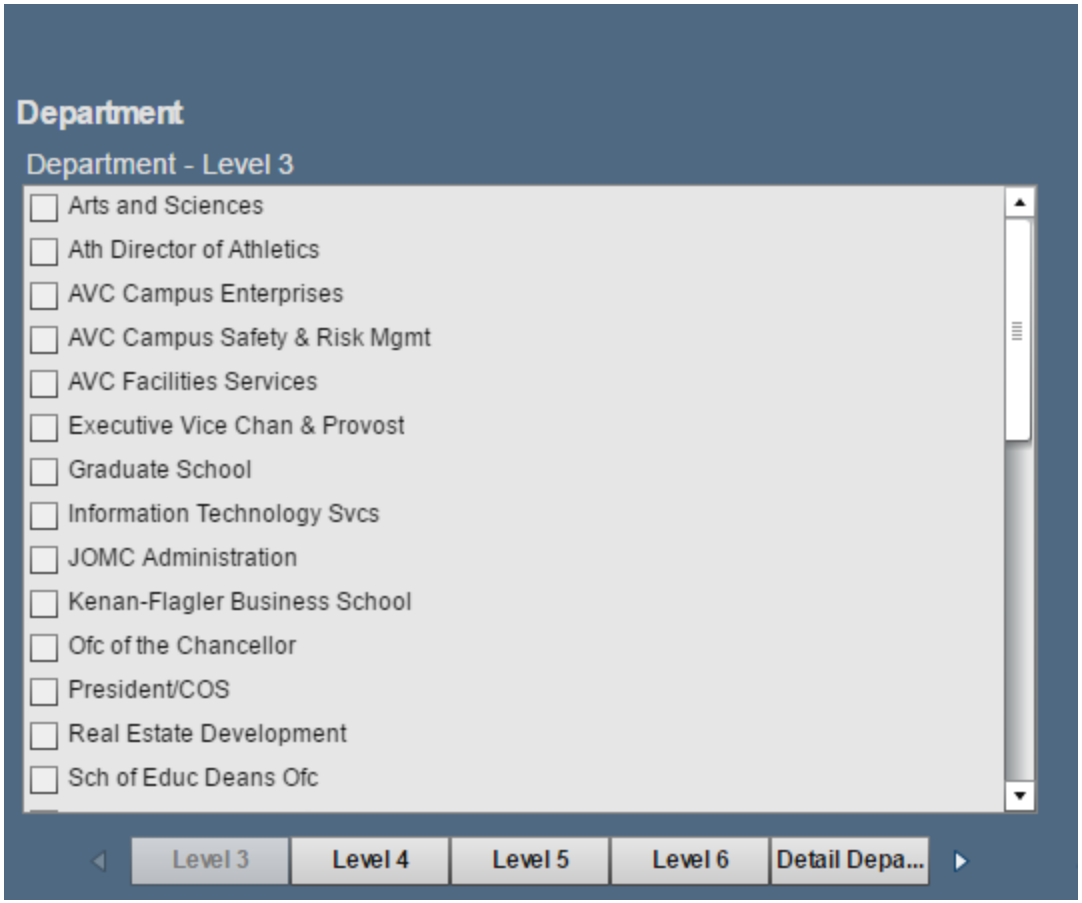
You can filter (select) on name

You can filter (select) on PID

You can filter on affiliate type

You can filter (select) on status (active/inactive)

Affiliates



You can filter (select) on department (multiple levels)

Affiliates

Employee ID	Employee Name	Dept. ID	Dept. Desc.	Affiliate Status	Sponsor Name	Aff. Type	Effective Date	End Date
7		265000	OHR-Disability Bene...	Active		Other Affiliate	May/28/2015	Jul/01/2017
7		260020	WSEE-Communicati...	Active		University Temp Svcs E...	Jun/27/2016	Apr/30/2017
7		260020	WSEE-Communicati...	Active		University Temp Svcs E...	Sep/09/2016	Apr/30/2017
7		260010	WSEE-Ofc of Vice Ch...	Active		University Temp Svcs E...	Jul/12/2016	Apr/30/2017
7		260010	WSEE-Ofc of Vice Ch...	Inactive		Other Contractor/Consul...	Feb/18/2016	Jun/30/2016

Data fields:

- PID
- Name
- Dept #
- Dept Name
- Status (active/Inactive)
- Sponsor
- Affiliate Type
- Effective Date
- End Date

Any column can be used to sort

Affiliates

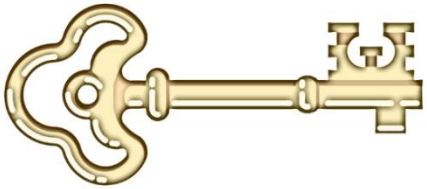
- If you have any issues:
  - Submit a help desk ticket
  - email infoporte-support@unc.edu
    - This creates a help desk ticket
  - Find the Affiliates Report guide on ccinfo.unc.edu

Salary Funding Report

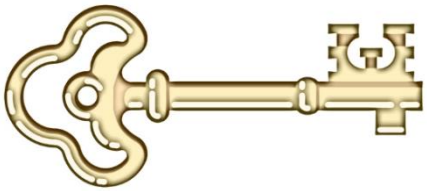
Rebecca Jones

Training Specialist

Key Points



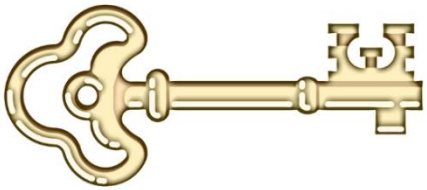
Live as of February 2nd



Who has Access automatically?

HR Users that have PAAT &

Enhanced Finance Reporting Users



Find the Salary Funding guide on:

CCinfo.unc.edu

Payroll Tab

Quick Search | Go | Online Help Request | Data Status | Rebecca

Please choose current funding or enter a date range.

INFOPORTE

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms

Earnings Distribution | Prelim Report | Summarized Payroll | Salary Projections | PAAT | Salary Funding

Base Search

Current Funding | Employee | Fund

Date From | Position # | Source

Date Thru | Job Dept (show all) | Funding Dept (show all)

Search | Clear

Advanced

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Name	PID	Empl Rcd	Empl Status	Empl Type	Job Dept ID	Job Title	Position #	Eff Dt	Eff Seq	Earn Cd	Fund	Source	Dept ID	Program	Project	Proj End Dt	Fund End Dt	Dist %	Comp Amt	Current
No data available in table																				

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Shows the funding sources for an employee's salary per job at UNC-Chapel Hill and UNC General Administration.

-No PAAT

-No Lump Sum Payments

Payroll Tab

Quick Search | Go | Online Help Request | Data Status | Rebecca

Please choose current funding or enter a date range.

INFOPORTE

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms

Earnings Distribution | Prelim Report | Summarized Payroll | Salary Projections | PAAT | Salary Funding

Base Search

Current Funding ☐

Date From

Date Thru

Employee

Position #

Job Dept (show all)

Fund

Source

Funding Dept (show all)

Search | Clear

Advanced

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Name	PID	Empl Rcd	Empl Status	Empl Type	Job Dept ID	Job Title	Position #	Eff Dt	Eff Seq	Earn Cd	Fund	Source	Dept ID	Program	Project	Proj End Dt	Fund End Dt	Dist %	Comp Amt	Current

No data available in table

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Payroll Tab

Quick Search | Go | Online Help Request | Data Status | Rebecca

INFOPORTE

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms

Earnings Distribution | Prelim Report | Summarized Payroll | Salary Projections | PAAT | Salary Funding

Base Search

Current Funding ☑ | Employee | Fund

Date From | Position # | Source

Date Thru | Job Dept (show all) | Funding Dept (show all)

Search | Clear

Advanced

Status (show all) | Employee Type (show all)

Project | Program | Account

Cost Code 1 | Cost Code 2 | Cost Code 3

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Name	PID	Empl Rcd	Empl Status	Empl Type	Job Dept ID	Job Title	Position #	Eff Dt	Eff Seq	Earn Cd	Fund	Source	Dept ID	Program	Project	Proj End Dt	Fund End Dt	Dist %	Comp Amt	Current
No data available in table																				

Show 50 entries Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Payroll Tab

Connect CAROLINA INFOPORTE

INFOPORTE

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms

Earnings Distribution | Prelim Report | Summarized Payroll | Salary Projections | PAAT | Salary Funding

Base Search

Current Funding ☑ | Employee | Fund

Date From | Position # | Source

Date Thru | Job Dept (show all) | Funding Dept

Search | Clear

Advanced

Status (show all) | Employee Type (show all)

Project | Program | Account

Cost Code 1 | Cost Code 2 | Cost Code 3

Show 250 entries | Showing 1 to 74 of 74 entries | First | Previous | 1 | Next | Last

Name	PID	Empl Rcd	Empl Status	Empl Type	Job Dept ID	Job Title	Position #	Eff Dt	Eff Seq	Earn Cd	Fund	Source	Acct	Dept ID	Program	Project	Proj End Dt	Fund End Dt	Cost Code 1	Cost Code 2	Cost Code 3	Dist %	Comp Amt	Curren
			Active	EPA Student		Graduate Research Assistant		8/17/2016	0						R1030				RX03612123			100	26,907.00	Y
			Active	EPA Post-Doc / Fellow		Postdoctoral Research Associate		7/28/2016	0						R1040				RX03512418			100	47,476.00	Y
			Active	EPA Non Faculty		Senior Research Associate	20016838	12/1/2016	0						R1040				RX03512522			20	22,000.00	Y
			Active	EPA Post-Doc / Fellow		Postdoctoral Research Associate		7/1/2016	0						R1050				RX03512101			100	47,476.00	Y
			Active	EPA Non Faculty		Director		7/1/2016	0													100	41,763.96	Y

Payroll Tab

Home | Inbox | Finance | HR | Tools | Cores

Employees | Positions | Reports | Request | Payroll | Forms

Earnings Distribution | Prelim Report | Summarized Payroll | Salary Projections | PAAT | Salary Funding

Base Search

Current Funding ☑ | Employee | Fund
Date From | Position # | Source
Date Thru | Job Dept (show all) | Funding Dept
Search | Clear

Advanced

Status (show all) | Employee Type (show all)
Project | Program | Account
Cost Code 1 | Cost Code 2 | Cost Code 3

Show 250 entries Showing 1 to 74 of 74 entries

First | Previous | 1 | Next | Last

Source | Acct | Dept ID

Acct 511170: EPA Non Teach Student Monthly

Name	PID	Empl Rcd	Empl Status	Empl Type	Job Dept ID	Job Title	Positic #						Fund End Dt	Cost Code 1	Cost Code 2	Cost Code 3	Dist %	Comp Amt	Current
			Active	EPA Student		Graduate Research Assistant								RX03612123			100	26,907.00	Y
			Active	EPA Post-Doc / Fellow		Postdoctoral Research Associate				52315	511170			RX03512418			100	47,476.00	Y
			Active	EPA Non Faculty		Senior Research Associate	200168							RX03512522			20	22,000.00	Y
			Active	EPA Post-Doc / Fellow		Postdoctoral Research Associate		7/1/2016	0			R1050		RX03512101			100	47,476.00	Y
			Active	EPA Non Faculty		Director		7/1/2016	0								100	41,763.96	Y

Entering Annual Performance Management Ratings

Tyler Enlow

EMR Consultant

Corrie Mimms

HR Business Analyst

SHRA Performance Management

- Key Changes
  - 2016-2017 Cycle
    - Timeline
    - Data Entry
    - Communication Timeline
- 2017-2018 Cycle
  - Data Entry

2016 – 2017 Timeline

- **March 1, 2017-March 31, 2017**: Manager develops 2017-2018 Performance Plans
- **April 3, 2017**: Manager delivers 2017-2018 Performance Plan
- **April 3, 2017-April 30, 2017**: Manager holds Annual Appraisal Conference with the Employee
- **April 30, 2017**: Deadline to enter Performance rating into ConnectCarolina

Project Timeline

- **February 2017** – Development on Form
- **March 2017** – Testing
- **April 3, 2017** – Go Live Date

Appraisal Data Entry in ConnectCarolina

- Overall Performance Rating and Overall ECA
  - Exceeds, Not Meeting, and Meeting Expectations
    - Total score (ie. 2.35) will not be captured
  - Developing, Applied, Broadly Demonstrated

- Only the supervisor reflected in ConnectCarolina can enter the ratings

- No routing or approvals required

InfoPorte Form

Infoporte Requests 0 In Progress / 0 Closed

Profile | Employee Request | Evaluation History | Performance Management 2015 | Performance Management 2016

Type of Action 2016 Annual Review

Year of Evaluation Cycle 28 (July 2015 - March 2016)

If "Annual Review" is selected all fields are required

Performance Goals & Organizational Values

Overall Rating

Override	Unsatisfactory	Below Good	Good	Very Good	Outstanding
○	○	○	○	○	◉

If "Override", select a reason. If any "Not Meet" is entered, the overall CANNOT = Outstanding

Competency Assessment

Overall Competency Rating

Developing	Applied	Broadly Demonstrating
○	◉	○

Manager WorkCenter

Manager WorkCenter

Favorites Main Menu > Manager WorkCenter > Manager WorkCenter

Manager WorkCenter

Performance Documents

- Current Documents
- View-Only Documents
- Performance Management Policy
- Performance Management Forms
- Performance Management Toolkit

UNC Manager WorkCenter

The Manager Work Center houses the links necessary to enter overall performance ratings for your Permanent SHRA employees.

Manager WorkCenter

Favorites ▾ Main Menu ▾ › Manager WorkCenter › Document Selection

Manager WorkCenter

Performance Documents

- Current Documents
- View-Only Documents
- Performance Management Policy
- Performance Management Forms
- Performance Management Toolkit

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Performance Documents Personalize | Find | First 1-3 of 3

Employee ID	Employee	Document Type	End Date	Job Title	Status
	Angenette McAdoo	SHRA Overall Ratings	03/31/2017	Human Resources Manager	In Progress
	Chariss Jones	SHRA Overall Ratings	03/31/2017	Human Resources Consultant	In Progress
	Christina Terminello	SHRA Overall Ratings	03/31/2017	Human Resources Specialist	In Progress

Current Performance Documents

Document Details

Chariss Jones, Senior E&MR Consultant
SHRA Overall Ratings: 04/01/2016 - 03/31/2017

Performance Document Details

Employee:	Chariss Jones	**Job Title:**	Human Resources Consultant
Document Type:	SHRA Overall Ratings	**Cycle:**	04/01/2016 - 03/31/2017
Template:	SHRA Overall Ratings	**Document ID:**	6902
Manager:	GENA CARTER	**Status:**	In Progress

Document Progress

Step		Status	Due Date	Action	Next Action
Complete Manager Evaluation		Not Started	04/30/2017		Start

Return to Select Documents

Manager WorkCenter

Performance Document - SHRA Overall Ratings

Manager Evaluation

Chariss Jones, Human Resources Consultant

SHRA Overall Ratings: 04/01/2016 - 03/31/2017

Author: GENA CARTER

Status: In Progress **Due Date:** 04/30/2017

Employee Data

Employee ID:		**Position Number:**	00055816
Department:	260104	OHR-Emp and Mgmt Relations	
Branch/Role:	Human Resources Consultant	**Competency Level:**	Advanced

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save Complete Return to Document Detail

Expand All Collapse All Expand Sections

Section 1 - Overall Performance Rating

Overall Performance Rating Summary

Rating:

1 - Not Meeting Expectations
2 - Meeting Expectations
3 - Exceeding Expectations
T - Insufficient Time to Eval.
U - Unavailable to Eval.

Section 2 - C

Expand

Overall Compe

Rating:

1 - Developing
2 - Applied
3 - Broadly Demonstrated
U - Unavailable to Eval.

Save Complete Return to Document Detail

Manager WorkCenter

Employee Data

Employee ID:		**Position Number:**	00055816
Department:	260104		OHR-Emp and Mgmt Relations
Branch/Role:	Human Resources Consultant	**Competency Level:**	Advanced

You have successfully saved your evaluation.

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save | Complete | Return to Document Detail

Employee Data

Employee ID:		**Position Number:**	00055816
Department:	260104		OHR-Emp and Mgmt Relations
Branch/Role:	Human Resources Consultant	**Competency Level:**	Advanced

Problem(s)completing your request:

- Please enter a section summary rating in the Overall Performance Rating section.
- Please enter a section summary rating in the Overall Competency Rating section.

Save | Complete | Return to Document Detail

Performance Document - SHRA Overall Ratings

Complete Evaluation

You have almost finalized your evaluation.

To confirm that you would like to mark the evaluation as completed, select the Complete button. **Do not complete this evaluation until you have met with the employee and finalized each section.**

The overall rating you have assigned to this document is 3 - Exceeding Expectations.

Complete | Cancel

Performance Document - SHRA Overall Ratings

Complete Evaluation Confirmation

The performance evaluation is finalized and marked as "Complete".

OK

Current Documents

Performance Documents Personalize | Find | First 1-2 of 2 Last

Employee ID	Employee	Document Type	End Date	Job Title	Status
	Angenette McAdoo	SHRA Overall Ratings	03/31/2017	Human Resources Manager	In Progress
	Christina Terminello	SHRA Overall Ratings	03/31/2017	Human Resources Specialist	In Progress

Manager WorkCenter

Favorites Main Menu > Manager WorkCenter > Manager WorkCenter

Manager WorkCenter

Performance Documents

- Current Documents
- View-Only Documents
- Performance Management Policy
- Performance Management Forms
- Performance Management Toolkit

UNC Manager WorkCenter

The Manager Work Center houses the links necessary to enter overall performance ratings for your Permanent SHRA employees.

View-Only Documents

View-Only Documents

Employee Selection Criteria

Select the employee you would like to view documents for. Only SHRA Permanent employees will have a ratings document for the 2016-2017 performance year. Previous documents will be available to view at a later date.

As Of Date 02/21/2017

Find Employee

GENA CARTER 's employees

Personalize | First 1-3 of 3 Last

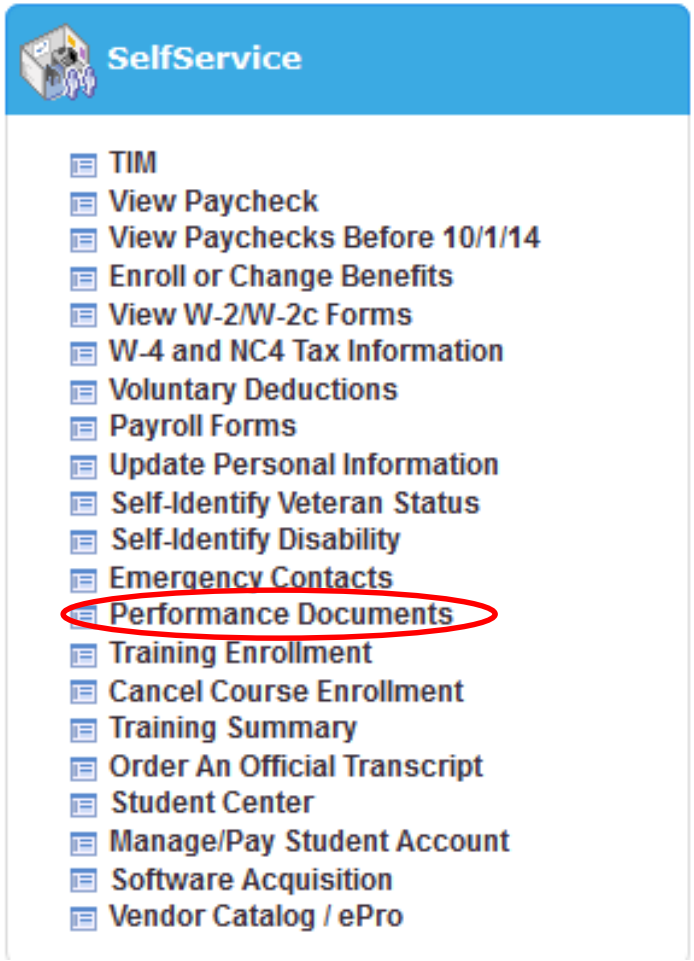
Select	Name	Empl ID	Empl Status	Empl Class	Full/Part Time	HR Status	Position	Job Title	Department
Select	Chariss Jones		Active	SPA Permanent	Full-Time	Active	00055816	Human Resources Consultant	OHR-Emp and Mgmt Relations
Select	Christina Terminello		Active	SPA Permanent	Full-Time	Active	00054427	Human Resources Specialist	OHR-Emp and Mgmt Relations
Select	**Angenette McAdoo**		Active	SPA Permanent	Full-Time	Active	20011910	Human Resources Manager	OHR-Emp and Mgmt Relations

View-Only Documents

GENA CARTER 's employees

Select	Name	Empl ID	Empl Status	Empl Class
Select	Chariss Jones		Active	SPA Permanent
Select	Christina Terminello		Active	SPA Permanent
Select	**Angenette McAdoo**		Active	SPA Permanent
Select	ANTHONY ENLOW		Active	SPA Permanent
Select	CHENISE CRUMP		Active	SPA Permanent
Select	Donna James-Whidbee		Active	SPA Permanent

Self Service



Self Service

Performance Document History

Chariss Jones

Listed below are your completed and cancelled performance documents.

Performance Documents Personalize | Find | First 1 of 1 Last

Employee ID	Document Type	End Date	Job Title	Status	Manager
	SHRA Overall Ratings	03/31/2017	Human Resources Consultant	Completed	GENA CARTER

Performance Document History

Document Details

Chariss Jones, Senior E&MR Consultant
SHRA Overall Ratings: 04/01/2016 - 03/31/2017

Performance Document Details

Employee:	Chariss Jones	**Job Title:**	Human Resources Consultant
Document Type:	SHRA Overall Ratings	**Cycle:**	04/01/2016 - 03/31/2017
Template:	SHRA Overall Ratings	**Document ID:**	6902
Manager:	GENA CARTER	**Status:**	Completed

Document Progress

Step		Status	Due Date	Action	Next Action
Review Manager Evaluation	✔	Completed	04/30/2017	View	

Return to Select Documents

Self Service

Performance Document - SHRA Overall Ratings

Manager Evaluation

Chariss Jones, Human Resources Consultant

SHRA Overall Ratings: 04/01/2016 - 03/31/2017

Author: GENA CARTER

Status: Completed **Due Date:** 04/30/2017

Employee Data

Employee ID:		**Position Number:**	00055816
Department:	260104		OHR-Emp and Mgmt Relations
Branch/Role:	Human Resources Consultant	**Competency Level:**	Advanced

The document status is Completed.

Return to Document Detail

Expand All Collapse All Expand Sections

Section 1 - Overall Performance Rating

Overall Performance Rating Summary

Rating: 3 - Exceeding Expectations

Section 2 - Overall Competency Rating

Expand Collapse

Overall Competency Rating Summary

Rating: 3 - Broadly Demonstrated

Return to Document Detail

Performance Management Responsibilities

- Serve as the Departmental SME for Performance Management
  - Information Network

- Transfer of Reviews
  - Supervisor requests form be transferred to HR Rep
  - HR Rep coordinates with EMR to transfer the document
  - Request for transfer will be reviewed and approved by Sr. Director, E&MR

Performance Management Responsibilities

- Reports
  - Will be able to run reports for department: Pre and Post review

- E&MR will provide information sessions for HR Reps

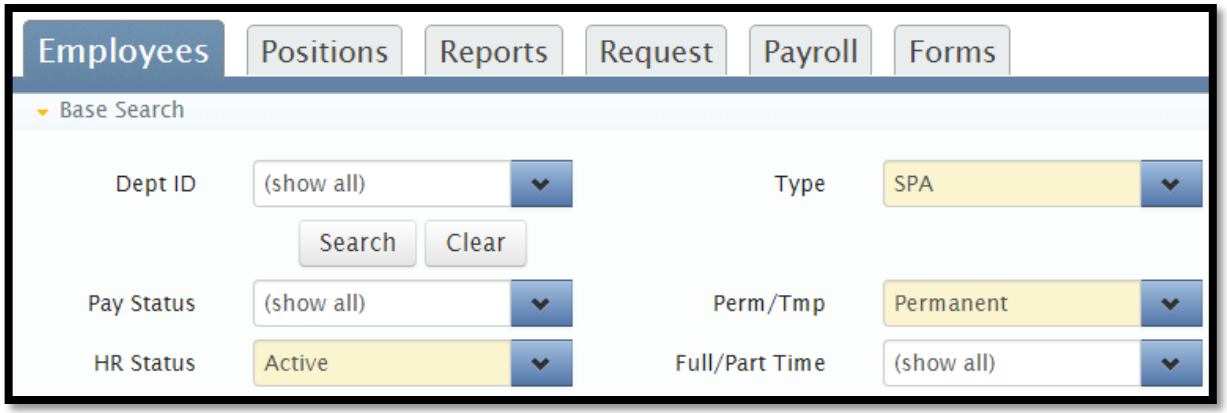
Communications to HR Officers and Campus

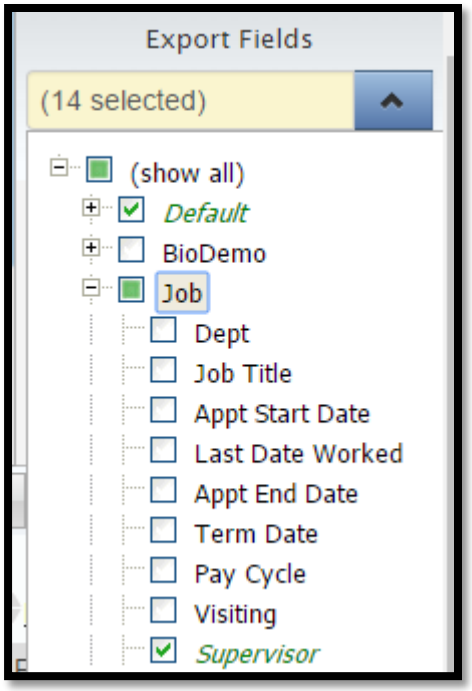
- February - Reminder about Appraisals
- March - Reminder about Performance Plans (2017-2018)
  - Screenshots/Instructions on ConnectCarolina, Video/Webinar for entering ratings

- April – Notification of E&MR assistance dates: AOB 1501 D (Computer Lab)
  - Tuesday, April 4 9:00-12:00
  - Wednesday, April 12 1:00-4:00
  - Tuesday, April 18 9:00-12:00
  - Thursday, April 20 1:00-4:00
  - Thursday, April 27 1:00-4:00
  - Friday, April 28 9:00-12:00

What can you do now to help prepare?

- Ensure permanent SHRA employees report to the correct supervisor/manager
  - Infoporte: Employees tab





- All employees must have a supervisor/manager
- A permanent SHRA employee can report to a position number (**Reports To**) or an employee PID (**Supervisor ID**)
  - Cannot have both Reports To and Supervisor ID
- Where can you find an employee's position number?
  - Job Data or UNC Employee Information

Updating an Employee's Supervisor

- **Reports To** resides on the position and is managed via *Add/Update Position* ePAR
  - If utilizing Reports To, then submit an *Add/Update Position* ePAR to change the position number
  - **Caution**: System will accept an inactive Reports To position. Ensure the Reports To position entered is Active.

Add/Update Position – Reports To

Step 2 of 5: Position Data

Header Information

eForm ID: 606146

Historical Data
Position Data

Position Data

Position Number:	22222222	Admin Support Specialist	Status:	Active
*Effective Date:			Reg/Temp:	Regular
Business Unit:	VCHMR	VC Workforce Strtgy/Eqty/Engmt	Standard Hours:	40.00
*Department:	260030	WSEE-Business Office	FTE:	1.000000
Reports To:	00062189			
*Job Family:	SPA		Max Head Count	1
*Job Function	SPA		FLSA Status:	Nonexempt
*Job Code	200007	Admin Support Specialist		
*Employee Group:				
Sal Plan:	1008	Admin Support Specialist		
*Salary Grade	JRN	Journey		
Location Code:	260101	OHR-Ofc of the Vice Chancellor		

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Updating an Employee's Supervisor

- **Supervisor ID** resides on the job and is managed via *Edit Existing Job* ePAR
  - If utilizing **Supervisor ID**, then submit an *Edit Existing Job* ePAR to change the Empl ID
  - **Caution**: If changing to a new Supervisor, the effective date must be on or after the Supervisor's hire date

Edit Existing Job – Supervisor ID

Form Data

*Effective Date:		
Job Family	SPA	
Employee Group:	SPA Permanent	
Position Number:	33333333	Admin Support Specialist
Department:	260030	WSEE-Business Office
Location Code:	260101	OHR-Ofc of the Vice Chancellor
Job Code:	200007	Admin Support Specialist
Salary Grade	JRN	
Regular/Temporary	Regular	
Std Hrs/Wk:	40.00	
FTE:	1.000000	
*Supervisor ID	720456601	ANN SAGER
*TIM Rept ID:	720456601	ANN SAGER
TSERS Re-employed Retiree		

FLSA Status Nonexempt

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Changing from a Position to Empl ID

- **Example**: Alice's position reports to PN # 11111111 and now her position needs to report to Billie, Empl ID 777777777
  - **Step 1**: Submit an *Add/Update Position* ePAR and remove the position number from the Reports To field.
  - **Step 2**: Once the Add/Update Position ePAR executes, submit an *Edit Existing Job* ePAR and add the Empl ID to the Supervisor ID field.
    - **Caution**: Do not start the Edit Existing Job ePAR until the Add/Update Position ePAR executes.
    - Use the same effective date.

Changing from an Empl ID to Position

- **Example**: Desmond reports to Clara, Empl ID 711111111. Desmond's position now needs to report to PN # 88888888
  - Submit an Add/Update Position ePAR and add the position number to the Reports To field.
    - System is automatically set up to remove the Supervisor ID in this scenario.

Negative Lump Sum Payments

Corrie Mimms

HR Business Analyst

Lump Sum Payments

Issue:

- Lump sum payments that have executed cannot be withdrawn
- Manual intervention can cause downstream issues

Fix:

- To correct an underpayment, submit a lump sum for the difference
- To correct or reverse a lump sum overpayment, a lump sum with a negative amount should be submitted
- Provides accurate picture for payroll and audit purposes

Negative Lump Sum Payments

Timing is key!

- The system will process the negative lump sum in the upcoming paycycle
  - Effective date is ignored

- Negative lump sum payments should be submitted in coordination with when the dock should occur

Retro and Late Actions

Vicki Bradley

Director, OHR

The Issue

- Actions are being initiated late / with retroactive effective dates
- Creates significant issues for the affected employee
- Requires time-consuming, manual intervention by multiple units to process and correct:
  - Division / School HR
  - Central OHR functional units (e.g. Benefits, Employment and Staffing, Class and Comp, EHRA-NF Employment)
  - HRIM
  - Payroll

The Action Types

- Action types include but are not limited to:
  - New hires (all employee types)
  - Rehires
  - Transfers
  - FTE changes
  - Salary increases
  - Pay rate changes
  - Lump sum payments
  - I-9 verification
  - Background checks

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The Numbers

Numbers based on the Action executing to the system after the Effective Date of the action.

Year	Total Actions	On Time	Late	% Late
2014	26,309	7,754	18,555	70.5%
2015	97,368	35,083	62,285	63.9%
2016	96,295	35,893	60,402	62.7%
2017 (YTD)	11,349	5,115	6,234	54.9%
Grand Total 2014 – 2017 (YTD)	231,321	83,845	147,476	63.8%

The Impacts

- Overpayments
- Underpayments
- Delays in pay (e.g. regular, longevity, lump sum, etc.)
- Shortening or loss of benefit election window
- Loss of opportunity to elect core retirement plan of choice (enrollment defaults to TSERS if action date is greater than 60 days)
- Enrollment exception request is required if action date is beyond eligibility window for health plan (approved only in rare exceptions)
- Delay in coverage begin date for core benefits plans

The Impacts

- Delay in changes to benefit plan premiums resulting in either retro deduction or refund
- Delay in COBRA benefits
- Delay in issuing One Card and parking permit
- For RIF – delay in receipt of final regular pay or initial severance payment
- Non-compliance with policies and regulatory requirements related to I-9 verification, unpaid volunteers, interns, visiting scholars, etc.

The Impacts

- Delay in Onyen set up and granting of system access (e.g. ConnectCarolina, faculty online orientation, etc.)
- Loss of system access when affiliate renewals and/or employee reappointments
- Delay in removing system access
- Inaccurate reporting of workforce data
- Business Analysts (HR, Benefits, Payroll, Commitment Accounting) spend considerable time performing manual intervention and processing to correct impacts. This greatly reduces the time available to work on system enhancements and new functionality.

The Plan

- OHR will begin providing a monthly report of late / retro actions to each HR Officer
- Initial distribution will be only to the HR Officer (first two months), after which executive leaders will be copied.
- OHR will work to garner support from executive leadership by providing information on the challenges and impacts associated with late/retro actions (e.g. Chancellor's Cabinet, Dean's Council, etc.)
- OHR will provide follow-up and support to those areas who have ongoing issues

The Goals

- Reduce the number of retro / late actions; which will in turn…
- Reduce the amount of manual intervention currently required by multiple business units to process retro / late actions and correct associated issues; which will in turn…
- Allow for more time and resources to be focused on strategic priorities, business process improvements, and system enhancements; and
- Ensure we pay our employees accurately and on time; and
- Allow our employees ample opportunity to make timely benefit elections

Questions?