## 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)

<table>
<thead>
<tr>
<th>Area</th>
<th>Date/Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR User Group Meeting</td>
<td>February 22, 2017 at 10:00am</td>
<td>Dey Hall, Toy Lounge or <a href="#">Webinar link</a></td>
</tr>
<tr>
<td>Topic</td>
<td>Presenter</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------------</td>
<td></td>
</tr>
<tr>
<td>Upcoming Projects List</td>
<td>Vicki Bradley</td>
<td></td>
</tr>
<tr>
<td>Affiliates Report</td>
<td>Ann Sager</td>
<td></td>
</tr>
<tr>
<td>Salary Funding Report</td>
<td>Rebecca Jones</td>
<td></td>
</tr>
<tr>
<td>Performance Management</td>
<td>Corrie Mimms and Tyler Enlow</td>
<td></td>
</tr>
<tr>
<td>Negative Lump Sum Payments</td>
<td>Corrie Mimms</td>
<td></td>
</tr>
<tr>
<td>Retro and Late Actions</td>
<td>Vicki Bradley</td>
<td></td>
</tr>
</tbody>
</table>
Upcoming Projects

Vicki Bradley

Director, OHR
### ConnectCarolina Projects (Jan-June, 2017)

<table>
<thead>
<tr>
<th>Area</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR - Campus Solutions</td>
<td>Person Updates Associated with CS 9.2 upgrade</td>
</tr>
<tr>
<td>Benefits</td>
<td>Benefits Max Program Option Process Retrofits</td>
</tr>
<tr>
<td>Benefits</td>
<td>Benefits Statements On-line</td>
</tr>
<tr>
<td>eForms</td>
<td>Electronic Personnel Action Request Form Improvements</td>
</tr>
<tr>
<td>HR</td>
<td>2017 Organizational Changes</td>
</tr>
<tr>
<td>HR</td>
<td>2017 SHRA work period changes</td>
</tr>
<tr>
<td>HR</td>
<td>2017 UNC GA Data mart enhancements</td>
</tr>
<tr>
<td>HR</td>
<td>Affirmative Action Plan 2016/2017 Reporting</td>
</tr>
<tr>
<td>HR</td>
<td>Automate ACA Reporting</td>
</tr>
<tr>
<td>HR</td>
<td>Automated Supervisor Mass-Update Process</td>
</tr>
<tr>
<td>HR</td>
<td>CLERY Act</td>
</tr>
<tr>
<td>HR</td>
<td>Database Compliance Enhancements</td>
</tr>
<tr>
<td>HR – E&amp;MR</td>
<td>Performance Management</td>
</tr>
<tr>
<td>Learning</td>
<td>Learning Management Enhancements</td>
</tr>
<tr>
<td>Payroll</td>
<td>2016 W2 Processing</td>
</tr>
<tr>
<td>Payroll</td>
<td>MultiState Compliance</td>
</tr>
<tr>
<td>Payroll</td>
<td>Paystub Modifications</td>
</tr>
<tr>
<td>Commitment</td>
<td>Long Term Solution for Salary and Benefit Projections</td>
</tr>
<tr>
<td>Accounting</td>
<td>Salary Funding Report</td>
</tr>
<tr>
<td>Commitment</td>
<td>Update Department Budget Table (DBT) with Suspense</td>
</tr>
<tr>
<td>Accounting</td>
<td>HR Additional employee info field phase 1</td>
</tr>
<tr>
<td>Accounting</td>
<td>HR Additional employee info field phase 2</td>
</tr>
<tr>
<td>Reporting</td>
<td>HR Affiliates Report</td>
</tr>
<tr>
<td>Reporting</td>
<td>Revised and additional employee info view on infoporte</td>
</tr>
</tbody>
</table>
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
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
Too small....
You can filter on effective dates

You can filter on end dates
### Affiliates

<table>
<thead>
<tr>
<th>Name</th>
<th>Employee Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee ID</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Affiliate Type</th>
<th>Aff. Type</th>
</tr>
</thead>
</table>

| Affiliate Status | Active (7,614) |

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).
You can filter (select) on department (multiple levels)
## Affiliates

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Dept. ID</th>
<th>Dept. Desc.</th>
<th>Affiliate Status</th>
<th>Sponsor Name</th>
<th>Aff. Type</th>
<th>Effective Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td></td>
<td>265000</td>
<td>OHR-Disability Bene...</td>
<td>Active</td>
<td></td>
<td>Other Affiliate</td>
<td>May/20/2015</td>
<td>Jul/01/2017</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>260020</td>
<td>WSEE-Communications</td>
<td>Active</td>
<td></td>
<td>University Temp Svcs E...</td>
<td>Jun/27/2016</td>
<td>Apr/30/2017</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>260020</td>
<td>WSEE-Communications</td>
<td>Active</td>
<td></td>
<td>University Temp Svcs E...</td>
<td>Sep/09/2016</td>
<td>Apr/30/2017</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>260010</td>
<td>WSEE-Ofc of Vice Ch...</td>
<td>Active</td>
<td></td>
<td>University Temp Svcs E...</td>
<td>Jul/12/2016</td>
<td>Apr/30/2017</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>260010</td>
<td>WSEE-Ofc of Vice Ch...</td>
<td>Inactive</td>
<td></td>
<td>Other Contractor/Consult...</td>
<td>Feb/18/2016</td>
<td>Jun/30/2016</td>
</tr>
</tbody>
</table>

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

Any column can be used to sort
• 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

Find the Salary Funding guide on: CCinfo.unc.edu

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
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

This image displays a portion of the Payroll Tab interface from Connect Carolina InfoPorte. The interface is used for managing payroll-related data and includes options for viewing different sections such as Earnings Distribution, Prelim Report, Summarized Payroll, Salary Projections, PAAT, and Salary Funding.

#### Base Search
- **Current Funding**: Check box to include current funding information.
- **Date From** and **Date Thru** fields for specifying date range.
- **Employee** field for searching by employee.
- **Position #** field for searching by position.
- **Job Dept** (show all) dropdown for department selection.
- **Fund**, **Source**, **Funding Dept**, **Search**, and **Clear** fields for filtering by funding details.

#### Advanced Search
- **Status** (show all) dropdown for specifying status.
- **Employee Type** (show all) dropdown for employee type.
- **Project**, **Program**, **Cost Code 1**, **Account**, **Cost Code 2**, and **Cost Code 3** fields for searching by project and cost codes.

#### Table View
- The table displays payroll data for various employees:
  - **Name** (Active, EPA Student, etc.)
  - **PID**
  - **Emp Status**
  - **Emp Type**
  - **Job Dept ID**
  - **Job Title**
  - **Position**
  - **Eff Dt**
  - **Eff Seg**
  - **Earn Cd**
  - **Fund**
  - **Source**
  - **Acct**
  - **Dept ID**
  - **Proj End Dt**
  - **Proj Fund**
  - **Cost Code 1**
  - **Cost Code 2**
  - **Cost Code 3**
  - **Dist %**
  - **Comp Amt**
  - **Currency**

The table entries include detailed payroll information for each employee, such as their position, earnings, cost codes, and funding details.
Payroll Tab
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

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

Current Performance Documents
Listed below are the current performance documents for which you are the Manager:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee</th>
<th>Document Type</th>
<th>End Date</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Angenette McAdoo</td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Manager</td>
<td>In Progress</td>
</tr>
<tr>
<td></td>
<td>Chariss Jones</td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Consultant</td>
<td>In Progress</td>
</tr>
<tr>
<td></td>
<td>Christina Terminello</td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Specialist</td>
<td>In Progress</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Step</th>
<th>Status</th>
<th>Due Date</th>
<th>Action</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Manager Evaluation</td>
<td>Not Started</td>
<td>04/30/2017</td>
<td></td>
<td>Start</td>
</tr>
</tbody>
</table>
Manager WorkCenter
Manager WorkCenter

Employee Data

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

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]
## Performance Documents

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee</th>
<th>Document Type</th>
<th>End Date</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Angenette McAdoo</td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Manager</td>
<td>In Progress</td>
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<tr>
<td></td>
<td>Christina Terminello</td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Specialist</td>
<td>In Progress</td>
</tr>
</tbody>
</table>
Manager WorkCenter

UNC Manager WorkCenter

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

### Gena Carter’s employees

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Empl ID</th>
<th>Empl Status</th>
<th>Empl Class</th>
<th>Full/Part Time</th>
<th>HR Status</th>
<th>Position</th>
<th>Job Title</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Charles Jones</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
<td>Full-Time</td>
<td>Active</td>
<td>00065816</td>
<td>Human Resources Consultant</td>
<td>OHR-Emp and Mgmt Relations</td>
</tr>
<tr>
<td></td>
<td>Christina Terminello</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
<td>Full-Time</td>
<td>Active</td>
<td>00064427</td>
<td>Human Resources Specialist</td>
<td>OHR-Emp and Mgmt Relations</td>
</tr>
<tr>
<td></td>
<td>Angenette McAdoo</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
<td>Full-Time</td>
<td>Active</td>
<td>20011910</td>
<td>Human Resources Manager</td>
<td>OHR-Emp and Mgmt Relations</td>
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</table>
### GENA CARTER's employees

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Empl ID</th>
<th>Empl Status</th>
<th>Empl Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Chariss Jones</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
<tr>
<td>Select</td>
<td>Christina Terminello</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
<tr>
<td>Select</td>
<td><strong>Angenette McAdoo</strong></td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
<tr>
<td>Select</td>
<td>ANTHONY ENLOW</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
<tr>
<td>Select</td>
<td>CHENISE CRUMP</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
<tr>
<td>Select</td>
<td>Donna James-Whidbee</td>
<td></td>
<td>Active</td>
<td>SPA Permanent</td>
</tr>
</tbody>
</table>
Self Service

- TIM
- View Paycheck
- View Paychecks Before 10/1/14
- Enroll or Change Benefits
- View W-2/W-2c Forms
- W-4 and NC4 Tax Information
- Voluntary Deductions
- Payroll Forms
- Update Personal Information
- Self-Identify Veteran Status
- Self-Identify Disability
- Emergency Contacts
- Performance Documents
- Training Enrollment
- Cancel Course Enrollment
- Training Summary
- Order An Official Transcript
- Student Center
- Manage/Pay Student Account
- Software Acquisition
- Vendor Catalog / ePro
Performance Document History
Chariss Jones
Listed below are your completed and cancelled performance documents.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Document Type</td>
<td>End Date</td>
<td>Job Title</td>
<td>Status</td>
</tr>
<tr>
<td></td>
<td>SHRA Overall Ratings</td>
<td>03/31/2017</td>
<td>Human Resources Consultant</td>
<td>Completed</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Performance Document Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee:</td>
<td>Chariss Jones</td>
</tr>
<tr>
<td>Document Type:</td>
<td>SHRA Overall Ratings</td>
</tr>
<tr>
<td>Template:</td>
<td>SHRA Overall Ratings</td>
</tr>
<tr>
<td>Manager:</td>
<td>GENA CARTER</td>
</tr>
</tbody>
</table>

Document Progress
Step: Review Manager Evaluation
Status: Completed
Due Date: 04/30/2017
Action: View

Return to Select Documents
# 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

<table>
<thead>
<tr>
<th>Employee ID:</th>
<th>Position Number: 00055816</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>OHR-Emp and Mgmt Relations</td>
</tr>
<tr>
<td>Branch/Role:</td>
<td>Human Resources Consultant</td>
</tr>
</tbody>
</table>

### Overall Performance Rating Summary

<table>
<thead>
<tr>
<th>Rating:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 - Exceeding Expectations</td>
</tr>
</tbody>
</table>

### Overall Competency Rating Summary

<table>
<thead>
<tr>
<th>Rating:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 - Broadly Demonstrated</td>
</tr>
</tbody>
</table>
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
Communication Plan

- 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
Supervisor / Manager Refresher

• 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.
### Step 2 of 5: Position Data

**Header Information**
- **eForm ID:** 606146

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

<table>
<thead>
<tr>
<th>Form Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effective Date:</strong></td>
</tr>
<tr>
<td>Job Family: SPA</td>
</tr>
<tr>
<td>Employee Group: SPA Permanent</td>
</tr>
<tr>
<td>Position Number: 33333333 Admin Support Specialist</td>
</tr>
<tr>
<td>Department: 260030 WSEE-Business Office</td>
</tr>
<tr>
<td>Location Code: 260101 OHR-Ofc of the Vice Chancellor</td>
</tr>
<tr>
<td>Job Code: 200007 Admin Support Specialist</td>
</tr>
<tr>
<td>Salary Grade: JRN</td>
</tr>
<tr>
<td>Regular/Temporary: Regular</td>
</tr>
<tr>
<td>Std Hrs/Wk: 40.00</td>
</tr>
<tr>
<td>FTE: 1.000000</td>
</tr>
<tr>
<td><strong>Supervisor ID:</strong> 720456601 ANN SAGER</td>
</tr>
<tr>
<td><strong>TIM Rept ID:</strong> 720456601 ANN SAGER</td>
</tr>
<tr>
<td>TSERS Re-employed Retiree</td>
</tr>
<tr>
<td>FLSA Status: Nonexempt</td>
</tr>
</tbody>
</table>

[Form image with highlighted supervisor ID]
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.
    - **Caution**: 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
The Numbers

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

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