

HR User Group Meeting

April 26, 2017



Topic	Presenter
Online W-4/NC-4s	Walter Miller
HR Payroll Deadline Calendar	Dave Turner
End of Semester Student Reminders	Corrie Mimms
Business Address (Gazette) and Updating Addresses	Ann Sager
InfoPorte Updates	Ann Sager
Performance Management	Corrie Mimms and Tyler Enlow

Online W-4/NC-4s

Walter Miller

Interim Payroll Director

- Effective April 4, SHRA employees no longer complete W-4/ NC-4 forms during Orientation
- Employees would be directed to submit these forms through ConnectCarolina
- Advantages of online submission
 - Secure
 - Decreases errors from manual entry
 - Immediately updated

- Current Self Service Options
 - Time Entry
 - Paystub
 - W-2
 - W-4/NC-4
 - Address Changes
- Future
 - Direct Deposit forms
 - Paperless W-2



HR/Payroll Deadline Calendar

Dave Turner

HR Business Analyst

New Appointment New Meeting New Items New Skype Meeting Today Next 7 Days Day Work Week Week **Month** Schedule View Open Calendar Calendar Groups E-mail Calendar Share Calendar Publish Online Calendar Permissions

April 2017

Raleigh, North Carolina

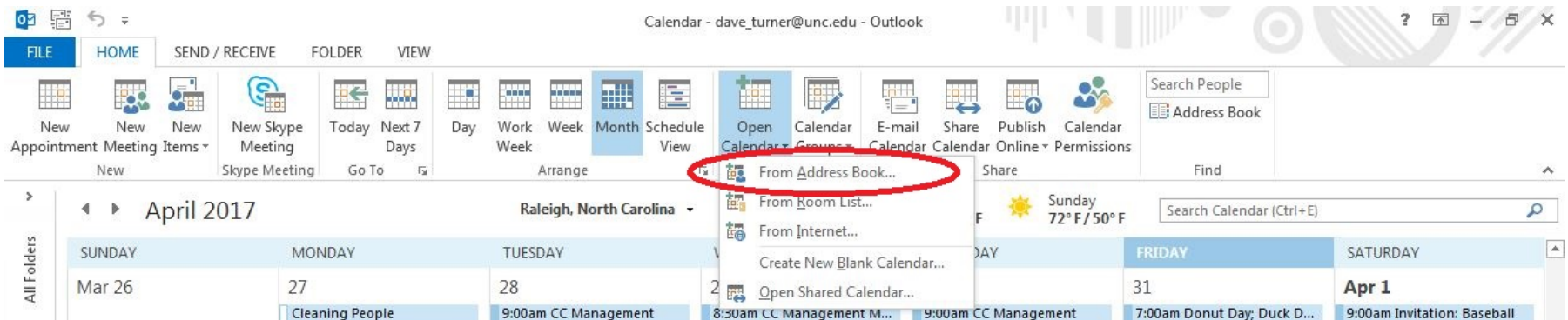
Today 56° F / 39° F Tomorrow 64° F / 43° F Sunday 72° F / 50° F

Search HR/Payroll Deadlines - Calendar (Ctrl+E)

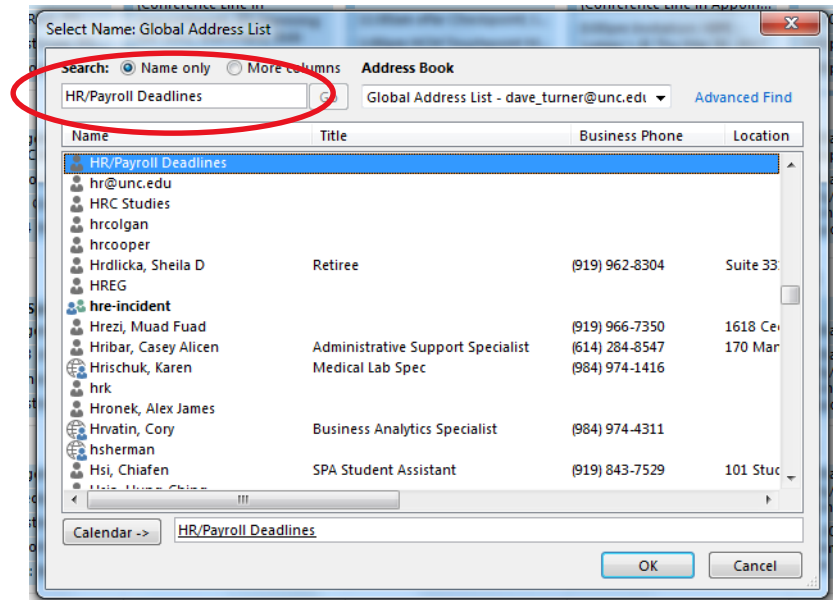
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Mar 26	27	28 B19 Lockout Ends - Noon M09 Payroll Confirm / Lockout Ends - Noon	29	30	31 B19 Payday M09 Payday	Apr 1
2 B20 Ends	3 B20 School/Division Deadline - Noon B21 Begins	4 B20 TIM Admin Deadline	5 B20 Central Office Approval Deadline - End of Day	6 B20 Payroll Lockout - Noon	7	8
9	10 B20 Payroll Confirm / Lockout Ends - Noon	11	12 B21 School/Division Deadline - Noon M10 School/Division Deadline - Noon	13 B20 Payday	14	15
16 B21 Ends	17 B21 Central Office Approva... B21 TIM Admin Deadline B22 Begins M10 Central Office Approv... M10 TIM Term Payout Dead...	18 B21 Payroll Lockout - Noon M10 Payroll Lockout - Noon	19	20 B21 Payroll Confirm - Noon	21	22
23	24	25 B21 Lockout Ends - Noon M10 Payroll Confirm / Lockout Ends M10 TIM Sign-off Deadline	26	27	28 B21 Payday M10 Payday	29
30 B22 Ends	May 1 B23 Begins	2 B22 School/Division Deadline - Noon B22 TIM Admin Deadline	3	4 B22 Central Office Approval Deadline - End of Day	5 B22 Payroll Lockout - Noon	6

All Folders

First, Open the Calendar from the Address Book



Then, Select the HR/Payroll Deadlines Calendar





Overlay To See Multiple Calendars

April 30 - May 6, 2017

Raleigh, North Carolina

Today 70° F / 58° F

Tomorrow 82° F / 64° F

Thursday 85° F / 67° F

Search HR/Payroll Deadlines - Calendar (Ctr... [↗](#))

Calendar x HR/Payroll Deadlines x

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
30 B22 Ends	1 B23 Begins	2 B22 School/Division D... B22 TIM Admin Deadline	3	4 B22 Central Office Approval Deadline - E...	5 Review Email B22 Payroll Lockout - ...	6
7 ^{AM}						
8			CC Management Mtg		Run Identity Finder; I	
9	CC Management Mtg	CC Management Mtg		CC Management Mtg	CC Management Mtg	
10						



End of Semester Student Reminders

Corrie Mimms

HR Business Analyst

- End of semester Student processing
 - EHRA Short Work Break
 - Expected Job End Date management
 - Moving from Work Study to SHRA Student / Temp
 - Deadlines
 - Quick Reference Guide review for SHRA
 - Student
 - Other Student Assistant
 - Temp
 - Terminations



Business Address (Gazette) and Checking Directory Address

Ann Sager

HR Business Analyst

- Business Address Review – sources of information
1) ePar Hire form

Business Address and Phone

Business address is the employee's work address.

*Address 1:

Address 2:

*City: *State: *Postal:

County:

*Phone:

Notice that there is no business address line 3

2) Directory updates

BUSINESS

Country* United States ▼	State/Province* North Carolina ▼	City Chapel Hill	
Address Line 1* 211 Manning Dr	Address Line 2	Campus Box	Public Yes
Zip/Postal Code* 27599			



This is address line 3

3) Person Update (designated person(s) within each school/division)

Edit Address

Country: United States

*Address 1: FPG Child Development Institute

Address 2: 105 Smith Level Rd.

Address 3: 8180

*City: Chapel Hill *State: NC North Carolina *Postal: 27599-8180

*County:



This is Campus Box

- What is the address for internal mailings??
- Example: Gazette
- If there is nothing in Address Line 3 (Campus Box)
 - The process defaults to the department's location
 - Dean's office address
 - Department main address
 - Employees get frustrated that they are not getting mail delivered where they expect it to be delivered
 - AND Mail Services tries to "fix" bad addresses

- What can you do?
 - Advise all NEW hires and TRANSFERS to update their address in the directory
 - Advise them to enter the campus box number (4-digit) and nothing else in the Campus Box field (don't type CB#1234, just enter 1234)
 - Ask employees who are not getting Gazettes at the address they expect to submit a help desk ticket
 - Ask employees who get the Gazette, but do not want it, to contact the Managing Editor of the Gazette (gazette@unc.edu) to opt out



InfoPorte Updates

Ann Sager

HR Business Analyst

- Date filter default change on 4 reports
 - Action History
 - Affiliate
 - Hire Report
 - Job Action and Position History



- Default begin = 1/1/1901, Default end = 12/31/2030



Performance Management

Corrie Mimms

HR Business Analyst

Tyler Enlow

EMR Consultant



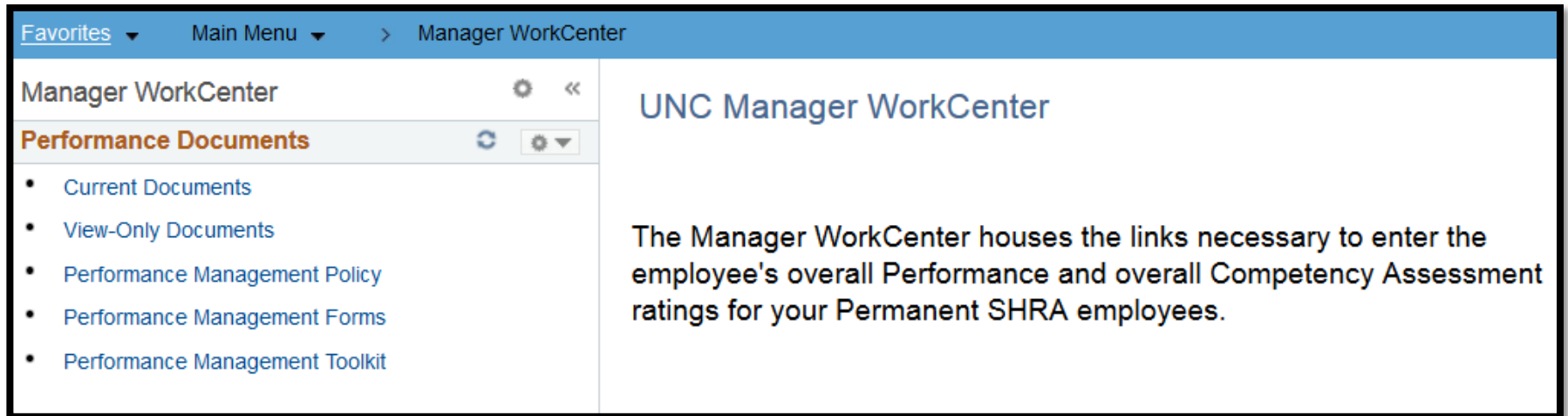
Entering Annual Performance Ratings

- We're live in ConnectCarolina!
- Successfully created 6349 manager evaluation documents
- 110 failed due to vacant Reports To, Inactive Supervisor ID, or missing data
 - Documents have been created with Tyler Enlow as the Manager
 - Documents are being transferred to the appropriate Manager or PM Point of Contact

- 360 documents have been started
- 2449 documents have been completed
- **Reminder:** Performance Ratings must be completed by April 30, 2017
- **Reminder:** Employees will be able to view completed ratings as of May 1, 2017
 - Applies to this year only!

Entering Annual Performance Ratings

- Manager WorkCenter
 - Current Documents
 - View-Only Documents



The screenshot shows the UNC Manager WorkCenter interface. The breadcrumb navigation at the top reads: Favorites > Main Menu > Manager WorkCenter. The left sidebar contains a tree view with the following items:

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

The main content area is titled "UNC Manager WorkCenter" and contains the following text:

The Manager WorkCenter houses the links necessary to enter the employee's overall Performance and overall Competency Assessment ratings for your Permanent SHRA employees.

What if a Manager does not see an Employee's document?

- ConnectCarolina Performance Management documents were created based on the employee's Supervisor as of 3/31/2017
 - Inactive Reports To, Supervisor ID, or missing data
 - ePAR to update Supervisor did not execute in time
 - Supervisors are in View-Only Documents vs. Current Documents
- Dept HR Rep or PM Point of Contact should submit a HELP ticket
 - EMR and/or HR Business Analysts will research and take appropriate steps
- Dept HR Rep should ensure Reports To and/or Supervisor ID are updated accordingly in ConnectCarolina, if appropriate

- In exceptional circumstances (ie. supervisor is on leave), EMR will approve the transfer of an employee's performance document to the PM point of contact for completion
- PM Point of Contact should submit a HELP ticket and attach the Transfer Request Form or email the form to emr@unc.edu
- Ratings can only be entered via Manager WorkCenter

The PM Rating needs to be changed!

- What should I do if a performance document is completed and has an incorrect rating?
 - Submit a HELP ticket requesting a new document
 - Document with incorrect data will be deleted
 - New document will be created and assigned to the supervisor for completion

- What should I enter for an employee on extended leave?
 - Enter On Extended Leave for the overall ratings
 - Once the employee returns and the supervisor has delivered the performance review, submit a HELP ticket
 - A new document will be created so the supervisor can enter the correct ratings
 - The old document will be deleted

- Terminated or Transferred Employees
 - If the employee has retired or terminated, reach out to your E&MR Consultant for next steps
 - If the employee transferred to a different position, reach out to your E&MR Consultant for next steps
- Probationary Period Employees
 - For Probationary employees who started prior to January 1, 2017, the manager should complete the full appraisal process and enter overall ratings into CC
 - For Probationary employees who started January 1, 2017 or later, the manager should enter “Insufficient Time” for the overall ratings

- What if the Supervisor does not see a document for one of their employees?
 - Submit a HELP ticket and we will research the status of the document
- What if the Supervisor has a document for someone they don't supervise?
 - Submit a HELP ticket and we will determine where the document should be transferred

