Connect
CAROLINA

iNFOPORTE

HR/Payroll

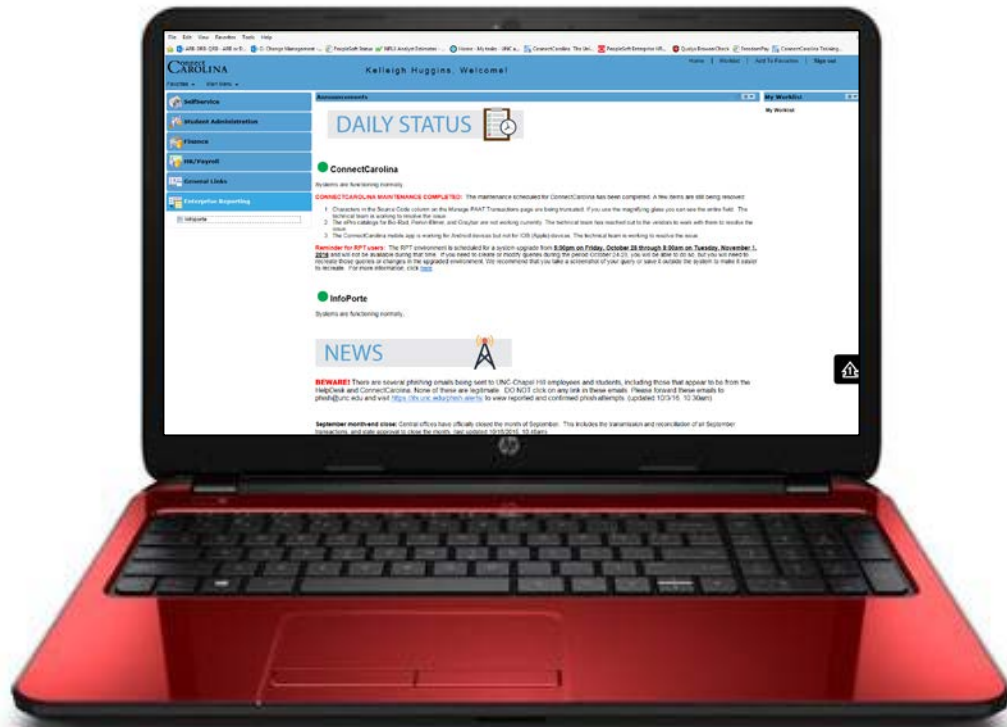# Advanced Training for
HR Representatives

VERSION: MARCH 2017

HR Representative Training

Advanced

February 2017

Topics

- Current Mindset

- Deep Dive
  - Effective Date
  - Expected Job End Date
  - Employee Status
  - Supplemental Pay
  - ePAR Checkboxes
  - FTE

- Bringing it all together - Questions

SUCCESS STORIES

Muddiest Point

Effective DATE

The effective-dating function enables you to maintain an accurate history of information in the system. Effective dating allows you to store historical information, see changes over time, and enter future HR actions.

Dates Rule in ConnectCarolina

February 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 **M08** begins	2	3 **B15** Payday	4
5 **B16** ends	6 **B17** begins	7 **B16 noon** School/ Division deadline **B16 TIM Admin** deadline	8	9 **B16 End of Day** Central Office approval deadline	10 **B16 noon** Payroll lockout	11
12	13	14 **B16 noon** Payroll confirm/ Lockout ends	15 **M08 noon** School/ Division deadline	16 **M08** TIM Term Payout deadline	17 **B16** Payday **M08 End of Day** Central Office approval deadline	18
19 **B17** ends	20 **B18** begins **M08 noon** Payroll lockout	21 **B17 noon** School/ Division deadline **B17 TIM Admin** deadline	22	23 **M08 noon** Payroll confirm/ Lockout ends **B17 End of Day** Central Office approval deadline	24 **B17 noon** Payroll lockout	25 **M08** TIM Sign Off deadline
26	27	28 **B17 noon** Payroll confirm/ Lockout ends **M08** Payday	March 1	March 2	March 3 **B17 PayDay**	March 4

All deadlines are 5 p.m. unless otherwise stated.

Monthly Cycle	Pay Period	Payroll lockout (all transactions due)	Payroll confirm date	Payday	Manual Check Request Date**	Manual Check Pick-Up Date
M06 (2016)	Dec 1 – 31	Dec 13	**Dec 19**	Dec 23	Jan 3	Jan 12
M07 (2017)	Jan 1 – 31	Jan 23	Jan 26	Jan 31	Jan 6	Jan 18
M08	Feb 1 – 28	Feb 20	Feb 23	Feb 28	Feb 6	Feb 15
M09	Mar 1 – 31	Mar 21	Mar 28	Mar 31	Mar 6	Mar 15
M10	Apr 1 – 30	Apr 18	Apr 25	Apr 28	Apr 6	Apr 17
M11	May 1 – 31	May 22	May 25	May 31	May 4	May 15
M12	Jun 1 – 30	*Jun 20*	*Jun 23*	Jun 30	Jun 6	Jun 15
M01	Jul 1 – 31	Jul 21	Jul 26	Jul 31	Jul 7	Jul 18
M02	Aug 1 – 31	Aug 22	Aug 25	Aug 31	Aug 4	Aug 15
M03	Sep 1 – 30	Sep 19	Sep 26	Sep 29	Sep 7	Sep 18
M04	Oct 1 – 31	Oct 23	Oct 26	Oct 31	Oct 5	Oct 16
M05	Nov 1 – 30	Nov 20	Nov 27	Nov 30	Nov 6	Nov 15
M06	Dec 1 – 31	Dec 12	Dec 19	Dec 22	Dec 6	Dec 15

After Payroll confirmation, a manual check request could be submitted. This results is a paper paycheck issued 1 week before the next B-paycheck, or 2 weeks before the next M-paycheck. Direct deposit is not an option.

There are minimum gross payout requirements for each payroll type: M= $406 and B= $290

This requires School/Division HR officer signature.
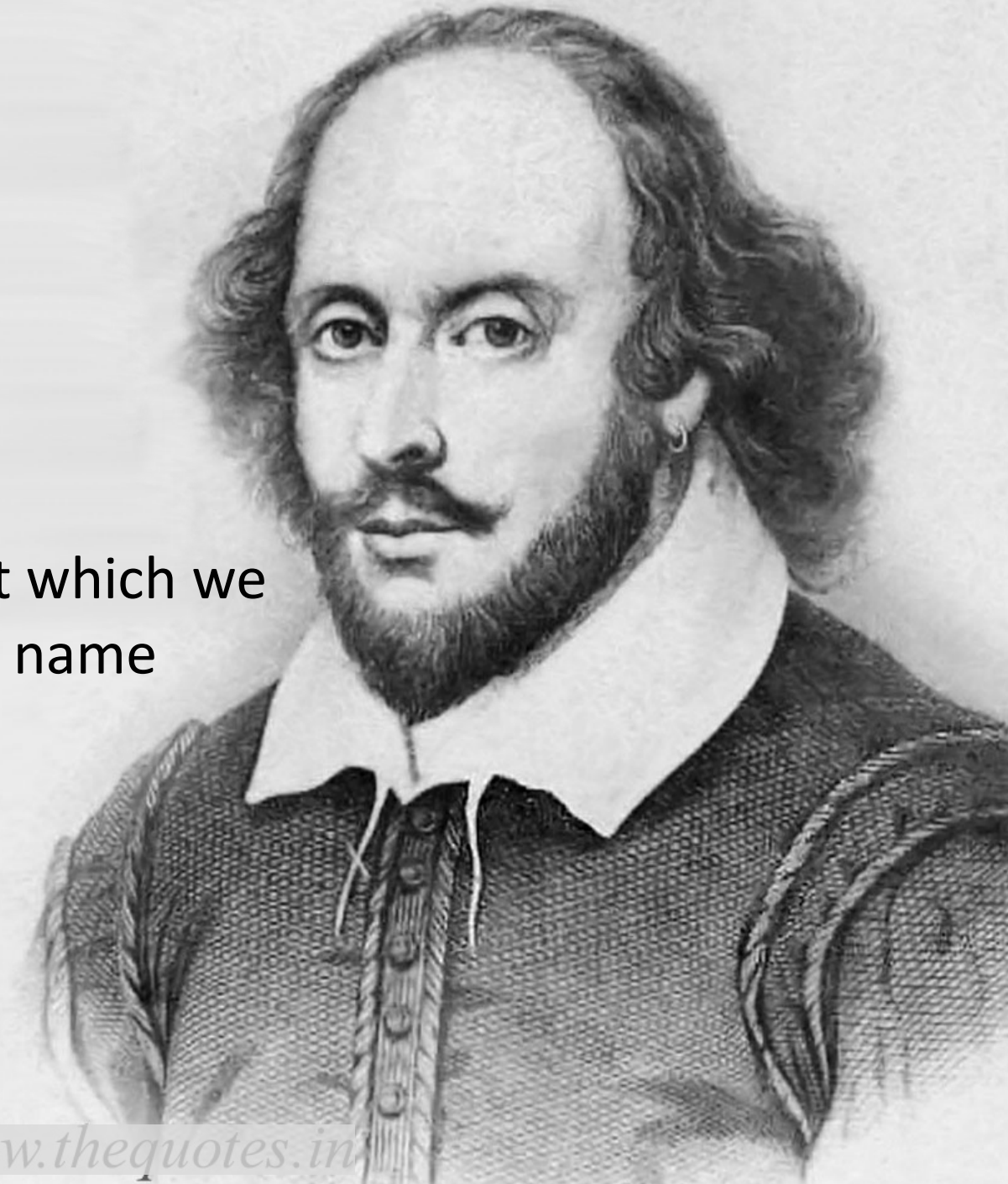
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Expected Job End Date

EXPECTED JOB END DATE is the known date a job will end entered on the ePAR forms for EHRA Faculty fixed term, Students, and Non-Faculty temporary employees. Also used when hiring SHRA Students and temporary employees.

What's in a name? That which we call a rose by any other name would smell as sweet.

- *William Shakespeare*

Expected End Date

Job End Date

EED

APPOINTMENT END DATE

Expected Job End Date

Not to be confused with…

— Funding End Date

— Effective date on a Termination action ;-)

What type of employee has a EED listed in their employment record?

- EHRA Faculty fixed term
- EHRA NF temporary
- EHRA Students
- Post Docs
- SHRA Temps
- SHRA Students
- SHRA Work Study

The Expected Job End Date field?

ANSWER

Which tab in an employees Job Data record provides information about the Expected Job End Date?

ANSWER

For SHRA temporary and student employees, what happens on the expected job end date?

ANSWER

What should you always do when entering in the Expected Job End Date?

ANSWER

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If the expected end date is 4/15/17 and the employee is receiving $2500 per month, the employee will receive $2500 in April unless...

EHRA students can be put on a Short Work Break, using an Edit Existing Job ePAR, to retain an active HR status and switch to an inactive payroll status.

Other EHRA employees that you are not going to extended or reappointed, need to be terminated.

SALARY STIPEND CALCULATOR FOR GRADUATE STUDENTS

YELLOW CELLS - INPUT
BLUE CELLS - OUTPUT

Name:	
PID:	
Title:	
Start Date:	
Pay Through Date:	
Expected Job End Date:	5/16/2016
# of months of service:	8.967742
Actual Payment Amount:	
Annualized Salary:	21008.633094
Flat rate:	1750.719424

Use this calculator if you want to determine the actual payment amount for a given annualized salary.
Enter the individual's information into the yellow input cells. The corresponding calculations will generate in the blue output cells.

Start Date:	
End Date:	
# of months of service:	8.967742
Annualized Salary:	
Actual Payment Amount:	15700.000000

SALARY STIPEND CALCULATOR FOR GRADUATE STUDENTS

YELLOW CELLS - INPUT
BLUE CELLS - OUTPUT

Name:	Kelleigh Trainhart
PID:	7004XXXXX
Title:	Graduate Research Assistant
Start Date:	8/17/2016
Pay Through Date:	5/16/2017
Expected Job End Date:	5/17/2017
# of months of service:	9.000000
Actual Payment Amount:	16000.000000
Annualized Salary:	21333.333333
Flat rate:	1777.777778

Use this calculator if you want to determine the actual payment amount for a given annualized salary.
Enter the individual's information into the yellow input cells. The corresponding calculations will generate in the blue output cells.

Start Date:	8/17/2016
End Date:	5/16/2017
# of months of service:	9.000000
Annualized Salary:	16000.000000
Actual Payment Amount:	12000.000000

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Action/Action Reason Combinations

Employee Type	ePAR Form	Action Code	Action Reason Code
EHRA Students			
-Extending appointment for a semester or longer	Edit Existing Job	Job Change	Reappointment
-Returning from Short Work Break	Edit Existing Job	Return form Work Break	Graduate Student Reappointment
-Extending Expected Job End Date by a day or two	Edit Existing Job	Data Change	Expected End Date Change
SHRA Student	Edit Existing Job	Data Change	Expected End Date Change
SHRA Temporary	Edit Existing Job	Data Change	Expected End Date Change
EHRA Faculty - Fixed Term	Edit Existing Job	Job Change	Reappointment
EHRA Non Faculty - Temporary	Edit Existing Job	Job Change	Reappointment

1

On the Employees tab, filter your list of employees then export to Excel

Note: Appt End Date pulls Expected Job End Date for SHRA employees

2

On the Reports tab, filter your list of employees then export to Excel

Reports | Request | Payroll | Forms

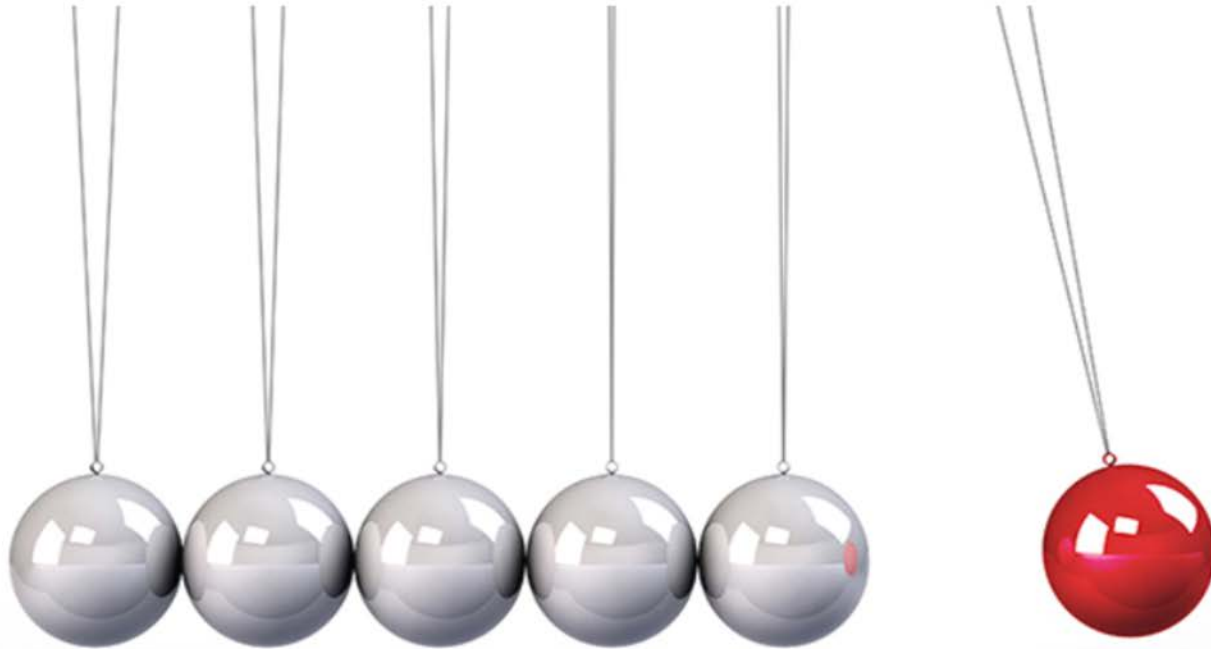Complete – EXERCISE 5

Report Type   - Select -

- Select -
Funding
    Funding Report
Person
    Action History Report
    Active Faculty Report
    Count Report
    Employee Academic Rank Report
    Employee Job-Position Report
    Expected End Date Report
    FTE Info for Affordable Care Act report
    Faculty Analysis Report
    Faculty Zero salary Zero FTE report
    Hire Report
    Job Action and Position History

Note: Use for all types of employees

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	Terms	?	Descriptions
A	Hire and Edit Existing Job ePARs	D	1.) Subject to the State Human Resources Act
B	12:00:01am	A	2.) Enter or update the expected job end date on one of these forms
C	Last Day Worked	E	3.) Name of one type of position that has an expected job end date
D	SHRA	I	4.) The day after the employee's last day of work
E	EHRA NF temporary	G	5.) Exempt from the State Human Resources Act
F	InfoPorte – HR SAS report	J	6.) First day of termination
G	EHRA	H	7.) Used to navigate to the employee's record where you can view their expected job end date
H	Job Data link	F	8.) Print a list of employees with Expected Job End Dates for an entire department
I	Expected Job End Date	C	9.) The day an employee clocks out for the last time
J	Expected Job End Date	B	10.) Time of day when the Job End Date becomes effective

Employee Status

Each employee has two different types of statuses in the system. A Payroll status and a HR status. They can be the same or different and impact many different HR actions in the system.

The current payroll status for an employee "sticks" with the employee regardless of other HR actions submitted for the employee.

It stays in effect until it is changed, explicitly, via an ePAR.

Rajani Trainer is a current graduate school student with a TA job in her department. Her HR representative correctly submitted an 'Edit Existing Job ePAR' to change her status to short work break before she started her summer break.

When she returned for the Fall semester the HR representative submitted a 'Hire an employee ePAR' to transfer her into her new TA job.

Rajani did not get paid, why?

If an employee has multiple jobs and goes out on a leave of absence, do you need to change the status on each job?

ANSWER

ePAR is submitted to place Primary job on PAID LOA

Director

Professor

Secondary Jobs are automatically placed on UN-PAID LOA

Can you have two ePARs using the same 'Change Return Date' action code, two times in a row for an employee?

ANSWER

Step 1 of 2: Enter Status Change Information

▼ Current Job Info

Name:	Reed Trainhart	**Empl ID:**	730180577
Position:		**Empl Record:** 0	

Job Code:	600002	Assistant Professor	
Dept ID:	900180	Organizational Training	Historical Data
			Job Data
Empl Status	Active		
	Job Family	EPA	
Employee Group	Faculty		**eForm ID:** 800148

Form Data

*Effective Date: 11/01/2016 🗓

Action Leave of Absence - Paid ⌄

*Reason FML 🔍 Family & Medical Leave (FMLA)

*Last Date Worked 10/31/2016 🗓

*Expected Return Date 11/30/2016 🗓

Annual 123,000.000000

*FTE 1.000000

File Attachments

	Upload	View	Description	Doc ID	
1	Upload	View	Leave Payout Docume 🔍		Delete

Add File Attachment

Comments

Your Comment:

All signed forms attached to ePAR

<< Previous | Submit

<< Search | Close

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If an employee is returning from a leave of absence, and had multiple jobs before taking their leave, do you need to change the status on each job?

ANSWER

If an employee has multiple jobs and is terminated, do you need to change the status on each job?

ANSWER

Tess VonTrain whose primary job is in the School of Medicine has two additional secondary jobs. Tess is taking a leave of absence.

What information do you need to collect first, who do you call. Which ePAR and what order to effect all the jobs properly. How will you bring the employee back from leave.

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Sometimes an employee's supplemental pay is entered on the Primary job.

What happens if this employee takes a LOA and the supplemental pay alone, should not be paid out?
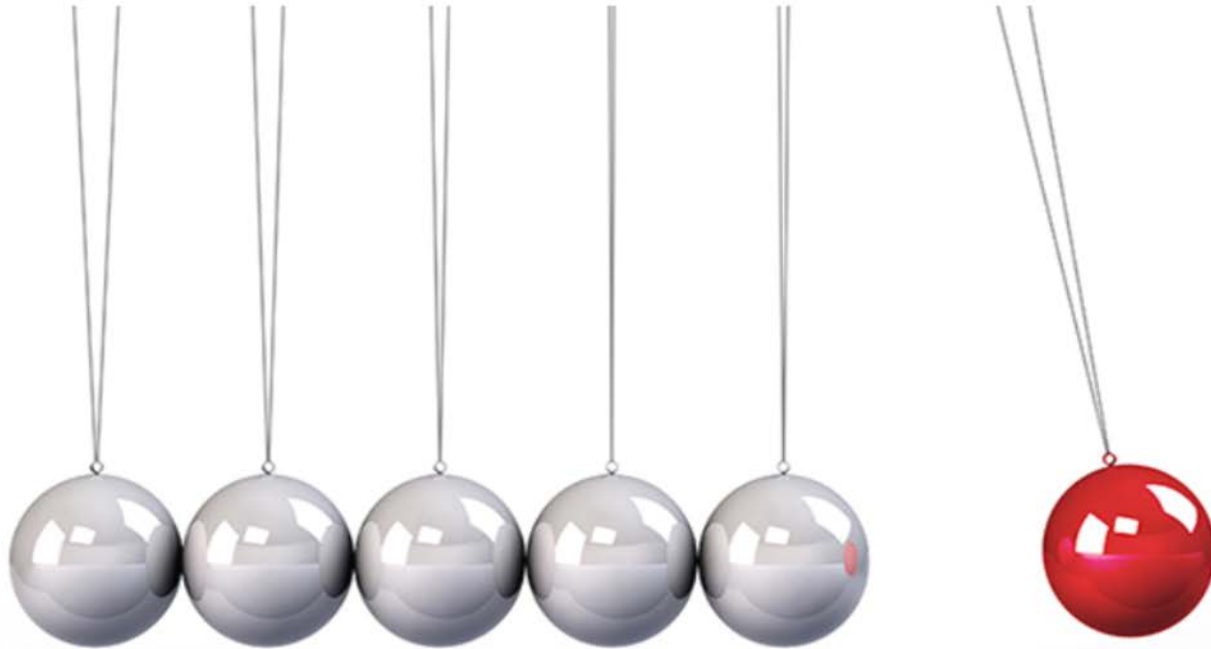
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Supplemental Pay *vs.* Overload Payments

opportunity.

Scenario- Rebecca Trainhart is currently a EHRA NF employee in your department. She's also going to teach 3 individual classes for the Dept. of City and Regional Planning in October. She is the Instructor of Record for these classes, not a guest speaker. For each class, she's going to receive $1500.00.

What do you need to submit in ConnectCarolina so Rebecca gets paid for her additional work?

ANSWER

Do you want to submit all three Lump Sum Payment ePARs at once?

ANSWER

Scenario- Zeke McTrain is going to be the Senior Director in your department. He'll also receive an additional $1,000.00 a month to manage a research project and laboratory.

What do you need to submit in ConnectCarolina so Zeke gets paid for all of his additional work?

ANSWER

In general, what is the preferred effective date you should always use on a Lump Sum Payment ePAR?

ANSWER

Are you up for a Challenge...?

Scenario- Evan Bytrainwell is a full time professor in your department.

He also has two secondary jobs: a Lab Director and an Adjunct Professor at The Friday Center. In addition, he is also serving as the Interim Dean for your department and getting supplemental pay on his primary job.

So, now what are your next steps?

Evan has just informed you that he needs to take a leave of absence. However, he will be able to continue serving on the search committee for the new Lab Manager (since the committee is in the middle of this process).

What's your first question?

IT'S A PAID LOA.

Checkboxes on ePARs

opportunity.

Several ePARs have questions that require

require you to mark or unmark a

checkbox that changes the action

the ePAR completes for an

employee. Lets take a closer look

at them.

Enter funding data for this position: ☐

ANSWER

The system displays the funding grid, allowing you to enter an allocated salary amount…
Are these funds encumbered?

ANSWER

☐ I do not wish to update compensation/funding on this action.

ANSWER

☑ **I do not wish to update compensation/funding on this action.**

The system does NOT display the Compensation page, allowing you to change other fields on the ePAR and keep the existing salary information untouched, on record.

☐ **I do not wish to update compensation/funding on this action.**

The system WILL display the Compensation page, allowing you to change salary and funding support information on the ePAR, along with the other fields.

Message

Going back will clear compensation data, which will have to be re-entered. Do you want to proceed? (24646,42)

Compensation data is dependent upon data entered on the previous pages, so changing data on those pages negates previously-entered compensation data.

Yes   No

The Previous Button is NOT Your Friend

☐ Non-compensation job

ANSWER

This employee has at least one active job with the university already.

Is he/she leaving a job at the university for this one?

☐ Edit Existing Job?

ANSWER

This employee has at least one active job with the university already.

Is he/she leaving a job at the university for this one?

if ✔ ☑ Edit Existing Job?

THEN... **It's a Transfer**

This employee has at least one active job with the university already.

Is he/she leaving a job at the university for this one?

if

☐ Edit Existing Job?

THEN... **Adding a Second Job**

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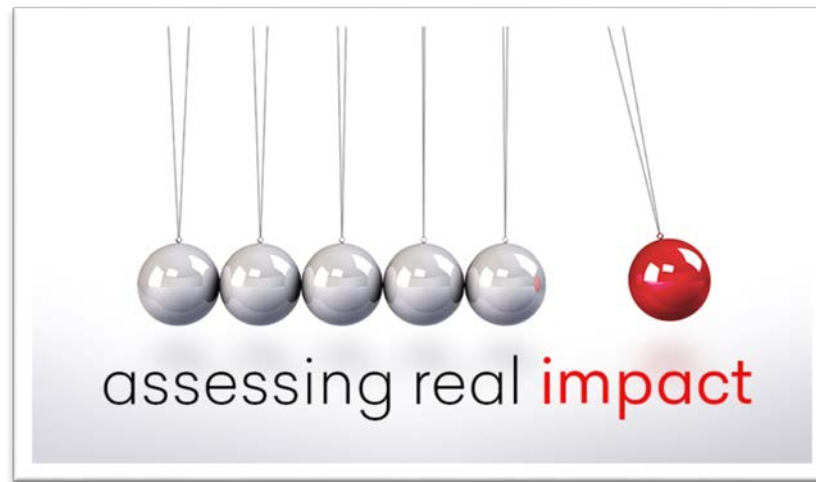
Possible answers to select from

when doing Exercise 7...

- Add/Update Position ePAR

- Hire ePAR

- Compensation page

- Edit Existing Job ePAR

- Change Employee Status ePAR

- Annual salary amount

FTE Changes

opportunity.

FTE stands for full time equivalency and 1.0 FTE is equal to 40 work hours in a week. An employee can only have a maximum of 40 work hours per week. .01 hours is used for the secondary jobs of existing full time employees

if an employee is in a position

THEN... there is a **2**-step process to update the FTE.

1st   Submit an Add/Update Position ePAR to update the FTE

When updating the FTE for an employee who is in a position, can you use the same effective date for both the Add/Update Position ePAR and the Edit Existing Job ePAR?

ANSWER

When updating the FTE for an employee who is in a position, can you process the second, Edit Existing Job ePAR while the first, Add/Update Position ePAR, is still in workflow?

ANSWER

3rd

If an employee is NOT in a position…

Use the Edit Existing Job ePAR to update both the FTE and compensation information.
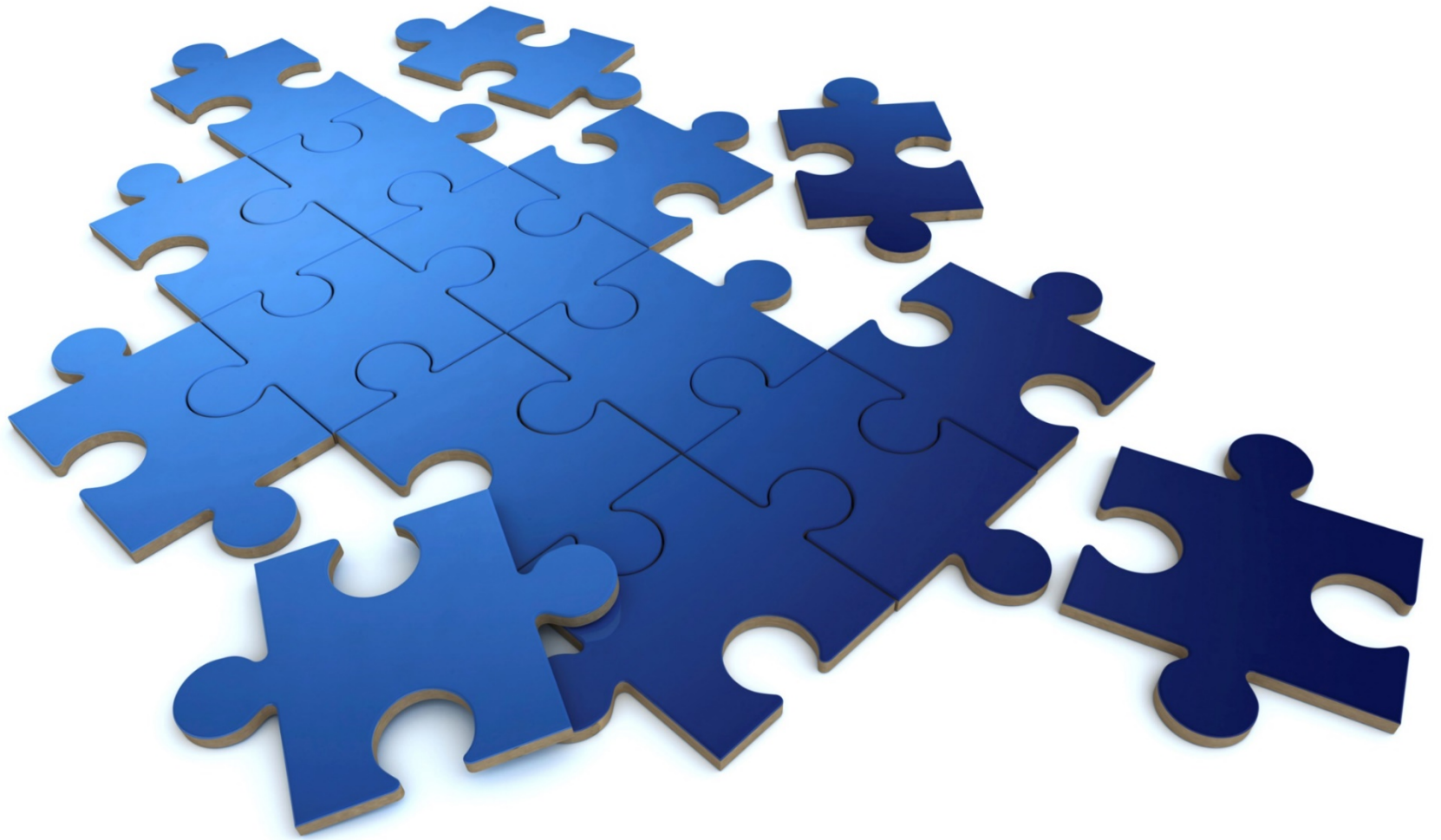
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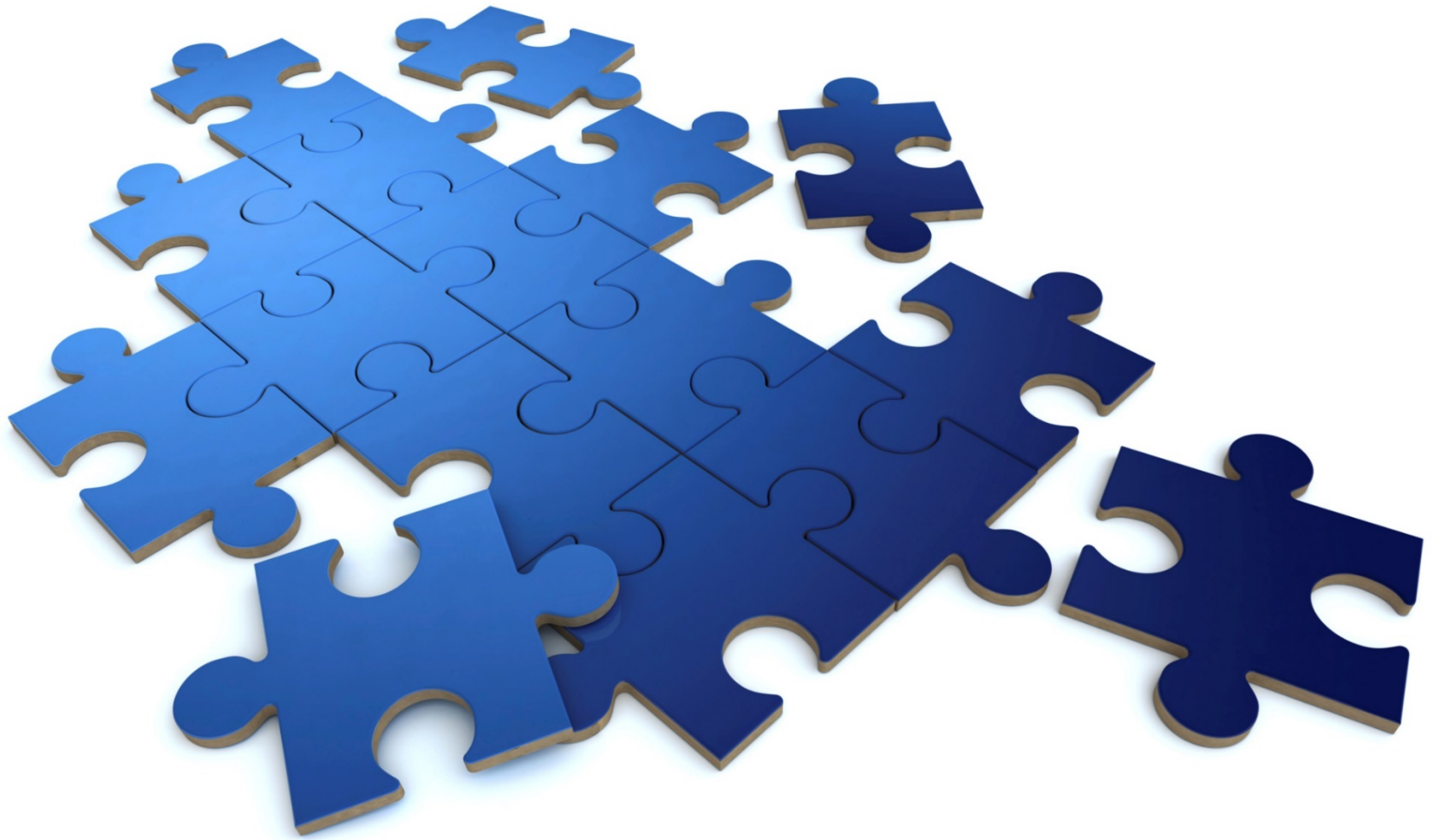
Who You Gonna Call When You Need Answers?

BEST PRACTICE

- Before you hire anyone, look up the PID using the multiple summary link. This gives you a picture of their FTE, EED etc.

- Track your actions. Follow your ePARs through execution

- Run the EED report in InfoPorte every month

- Get to know the payroll calendar and the deadlines every month

- Keep in mind, many paper forms are still required and must be used in conjunction with the ePARs

Questions?

Extra Scenarios