

2016-2017 ConnectCarolina Year-End Review

ConnectCarolina, its data warehouse and InfoPorte-based reporting system serve as core financial, human resource, payroll, and reporting systems for University of North Carolina Chapel Hill and General Administration. ConnectCarolina also includes the student information system for Chapel Hill. ConnectCarolina is supported by a coalition of staff from the Divisions of Finance, Information Technology, Workforce Strategy, Equity and Engagement and the Vice Chancellor for Research. The student administrative systems have been live for nine years; financial, human resources and payroll applications went live two-and-one-half years ago.

During the 2016-2017 academic year, ConnectCarolina support staff shifted their focus from post-go-live stabilization support for finance, human resources and payroll applications to enhancing functionality, providing new reporting capabilities, and improving the usability of the system. Both campus and central administrative users benefited from the team's efforts. This report highlights some of the most significant improvements and successes.

Students

Among the benefits that students saw were:

- Improvements to the student center and undergraduate degree audit, identifying repeated courses and transfer credit; this is essential for helping students identify courses that are required for graduation;
- An on-line form for transferring to the new Biomedical Engineering (BME) major that enables current students to apply for the joint BME program with NC State;
- Loading campus health immunization data into the Student Health database was simplified. All undergraduates are now able to upload documents to the student information system from their Self-Service page, rather than using US Mail or email;
- First-year students benefited from new interfaces to support the Carolina Computing Initiative, which allows financial aid grants to be established as Barnes and Noble accounts to pay for computer purchases for first year students.
- Alumni may now use Credentials Solutions to quickly and securely obtain transcripts.



The Numbers

- Undergraduate applications received	42,394
- Graduate and Professional School applications received	33,233
- Undergraduate Early Decisions released	23,684
- Undergraduate Regular Decisions release	18,710
- Total course enroll and drop actions entered by students	493,447
- Undergraduate Degrees Awarded	4,533
- Graduate & Professional Degrees Awarded	3,484
- Students taking Friday Center On-line Courses	3,507
- Friday Center Continuing Education Participants	2680
- Hours of Continuing Education Completed	75,211
- 1098Ts issued	36,224

Faculty

Faculty saw:

- New capabilities for downloading class rosters with student email addresses;
- Faster rendering of the class roster;
- Improved navigation and reduced clicks in the ConnectCarolina faculty center;
- Legislative annual raises and bonuses;
- Greater protection for their W-2 information with the implementation of 2-step verification requirements;
- Annual statements showing the value of their benefits;
- Military veterans and those with disabilities can now self-identify in an on-line form.

Employees

- Received a set of legislative increases, annual raises, and bonuses;
- Got extra protection for their on-line W2s with two-step verification;
- Saw an improved user interface in TIM, the online Timekeeping system;
- Received their annual statement showing the value of their benefits;
- Military veterans and those with disabilities can now self-identify in an on-line form;
- Managers and employees can now view their HR training records on line.



The Numbers

- Electronic Personnel Action Requests processed	103,823
- Paychecks issued	427,785
- Payroll Accounting Adjustments processed	24,513
- W2s issued	30,969
- 1095Cs issued	19,542

Financial Support Staff

Financial Support Staff in Schools, Departments, and other Campus units saw several improvements:

- Campus Journal Entry functionality was enhanced to allow entry of multiple lines in a single journal;
- New alerts to campus provide information on budget errors on purchase orders, requisitions and vouchers to help users correct errors;
- Significant improvements were made to salary and benefit projections providing better estimates of anticipated charges to sponsored project funds to help investigators understand what funds are available;
- Entry of purchase requisitions and vouchers was simplified by reducing the number of product category codes from 56,000 to 800;
- A set of new reports was created to provide summary and detailed month-end financial status reports for State, F&A, and Trust funds;
- An Office of Sponsored Research Invoice Listing Report was developed to show open invoices on a sponsored contract or project;
- The Salary Funding Report was released to show which accounts are assigned to be charged for salary, fringe and other personnel-related expenses;
- A new Suspense Analysis Report identifies labor costs going to suspense because funding sources have expired;
- A pilot interactive Budgets to Actuals report was rolled out in Athletics.



The Numbers

- Purchase Requisitions submitted	101,769
- Purchase Orders issued	95,902
- Vouchers submitted	429,549
- 1099s issued	3,573
- Journal Lines Processed	16,111,462

Financial Support Staff (cont.)



The Numbers

- Travel Reimbursements processed	28,686
- Pcard transactions approved	88,879
- Customer Billing Management System journals* processed (totaling \$126 million)	1,177
- Environmental Health and Safety Training sessions completed	59,898
- CORE Labs orders completed (totaling \$10.6 million)	11,400

*Bill presentation and payment system for 37 different services and vendors.

Human Resources Support Staff

Human Resources Support Staff in Schools, Departments and other Campus units benefited from significant improvements including:

- A largely manual process for managing clinical fellows' benefits was eliminated when that group's benefits program was absorbed into ConnectCarolina;
- Improvements to the electronic Personnel Action Request (ePAR) form;
- A new report that makes it easy to see an employee's planned end date;
- A new Affiliates report showing when Affiliate appointments are ending.

Admissions and Financial Aid

Admissions and Financial Aid personnel in undergraduate, graduate and professional school admissions offices saw:

- Completion of updates including additional PS pages, fields and processes, customizations in admission applications and interfaces, creation of new applications, new test score changes in format and fields in PS, and other changes in support of the annual admissions and financial aid cycles. These updates benefitted: Undergraduates, Graduate Students, School of Nursing, the Dental Assistant Program, Summer School, Friday Center Continuing Education, BRIDGES Program, Eshelman School of Pharmacy, School of Medicine, School of Dentistry, School of Law, Allied Health Program, Gillings School of Global Public Health, School of Government, Kenan Flagler Business School, School of Education and intra-transfers of undergraduates to professional schools;
- Roll-out of the Slate CRM platform to Undergraduate Admissions, and the Slate admissions platform to the Graduate School, School of Nursing, the Dental Assistant program, Summer School, Friday Central Continuing Education, BRIDGES Program, Eshelman School of Pharmacy, School of Medicine, School of Dentistry, School of Law, Allied Health program, Gillings School of Global Public Health, School of Government, Kenan Flagler Business School, School of Education and intra-transfers of undergraduates to professional schools;
- Two cycles of undergraduate admissions decisions released, including 23,684 early admissions decisions and 18,710 decisions for the 2017 academic year.

Other Student Administrative Offices

Other student administrative offices gained advantages as well:

- **Office of the University Cashier:** The old refund check-printing system was replaced with an improved application and “speedtypes” were implemented to simplify data entry for deposits;
- **The Graduate School, UNC Schools and Departments:** There were improvements to systems enabling payments to graduate students. These improvements also reduced budget-related processing issues for their health insurance;
- **The Medical School:** Medical School students and graduates got a new transcript;
- **Office of the University Registrar:** Placement exam score input was automated;
- **Faculty and student support staff:** GPA and other additional student data was added to InfoPorte to improve enrollment, term, class and instructor reports;

Finance Central Administrative Offices

Finance Central Administrative Offices got support including:

- **Fiscal Year End Close** planning, clean-up and processing assistance to Accounting Services, Financial Reporting, the Budget Office, Procurement, and the Office of Sponsored Projects for both FY16 and FY17.
- **Financial Reporting:** Creation of UNC’s Consolidated Annual Financial Report (CAFR) for Fiscal Year (FY) 2016 and a rewritten, streamlined CAFR for FY 2017.
- **Office of Sponsored Research:** New ConnectCarolina configurations and reports have improved controls associated with the award close-out process including sending payroll expenses for expired projects to suspense and improved information needed to support financial reporting, sponsor invoicing and improved business processes;
- **Procurement:** Changes to configurations and programming allowed Purchasing to eliminate a manual process, heavily reliant on paper, with a new paperless process.

Workforce Strategy, Equity and Engagement

Workforce Strategy, Equity and Engagement received the following services:

- Benefits year end support;
- Migration of performance management ratings entry to ConnectCarolina;
- Clery Act compliance reporting;
- Automation of Affordable Care Act reporting Affirmative Action Plan reporting;
- 2017 work period and organizational changes;
- Improvements to Learning Management capabilities;
- A quarterly salary increase report.

Other UNC Administrative Departments

Benefits to other UNC administrative departments include:

- A new online work center to enable the **PID Office** to use the system more efficiently;
- **The Office of International Students and Scholar Services (ISSS)**: Non-resident post graduates can now update their personal email online for SEVIS tracking and reporting, the process for uploading ISSS Visa documents into SEVIS was automated, and a new data collection form was implemented to support immigration reporting and payroll tax;
- **Office of Institutional Research and Assessment**: Term census data was provided to provide the office key information about the student population and student data was provided to support eXplorance Blue, a new instructor evaluation tool.
- **Information Technology Systems Privacy Office**: Received a new system for tracking Business Associate Agreements in support of HIPAA compliance;
- **The Friday Center**: Received support for implementing digital signage;
- **Facilities** benefited from the decommissioning of the former Motor Pool application which was replaced by new interfaces to Enterprise Car Rental;
- **Campus Enterprises/Carolina Managed Print Services**: New interfaces to Xerox were established;
- **Environmental Health and Safety**: New Hot Work Permit application.

Compliance

A significant amount of effort was devoted to meeting federal and state regulatory requirements and UNC General Administration mandates. This work included the following:

- Implementing the UNC General Administration (GA) Guaranteed Tuition plan, which supports the University's commitment to providing an affordable education;
- Shifting responsibility for undergraduate residency decisions from central offices to a GA-mandated central application; this required change provides students with consistent residency classifications and appeals, while reducing demands on central offices;
- Managing a new course drop process mandated by GA;
- Regular changes to General Administration (GA) requirements for student and employee DataMarts;
- Completion of summer, fall and spring Census;
- Completed all systems modifications needed to implement changes to the federal Fair Labor Standards Act (FLSA) and then backed them out over Thanksgiving weekend in response to an injunction against implementation of the regulations;
- Completion of seven separate projects to implement the North Carolina state legislative increases, annual raises, and bonuses;
- Support for producing annual tax documents including W2s, 1098Ts, 1099s, and 1095Cs;
- Federal and state and non-resident alien tax and withholding updates.

Routine System Maintenance and Upgrades

If all this were not enough, the team also performed regular maintenance, completed the analysis, testing and retrofits to apply application upgrades and patches, and successfully absorbed an additional group into the team. This system support and improvements work included:

- Four quarterly upgrades to student administrative applications;
- A major infrastructure upgrade for ConnectCarolina to provide the latest security patches and update underlying programming and configuration tools;
- Three InfoPorte Releases;
- ConnectCarolina Student Administration and Finance and InfoPorte performance improvements.



The Numbers

- Logins to ConnectCarolina	9,111,756
- Application Access Requests Processed	4,886
- Documents added to Electronic File Management System	1,054,068
- Help and Service Requests Received	29,021
- Help and Service Requests Resolved	26,197
- Enhancements and Corrections Implemented	1,210