ConnectCarolina for Healthcare Employees

VERSION: 12/2021

Table of Contents

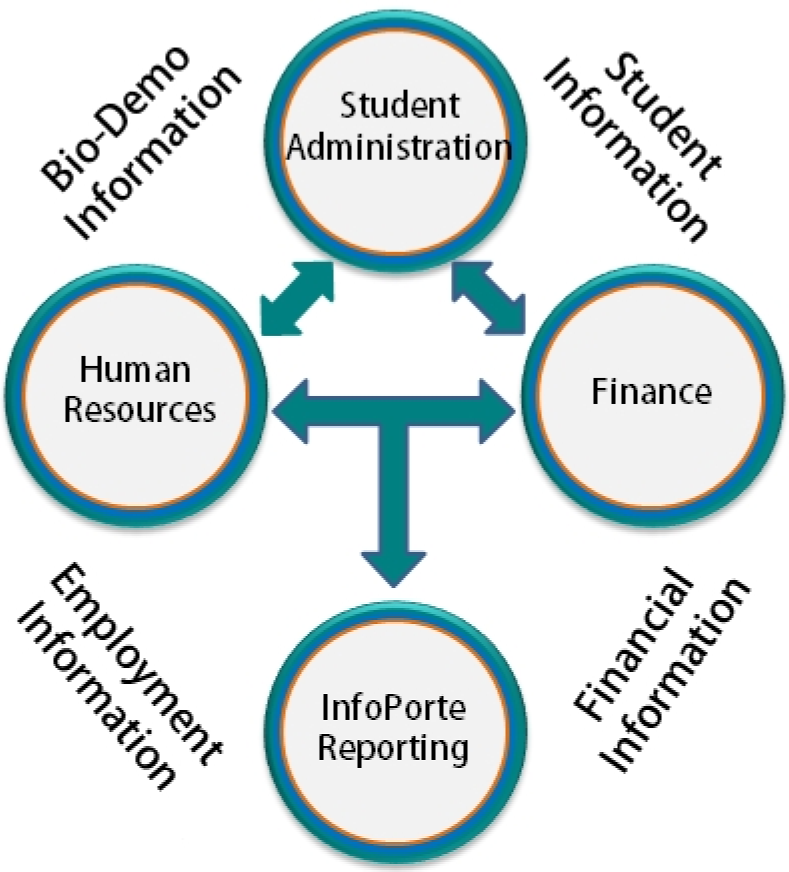
1 Introduction to ConnectCarolina

In this chapter, you will learn how to:

- Identify the different areas of the ConnectCarolina Human Resources system
- Describe the integration of the ConnectCarolina Human Resources, Finance, and Student Administration (SA) systems
- Define position management
- View position information in the ConnectCarolina system
- View job data in the ConnectCarolina system

ConnectCarolina: An Integrated System

The best way to learn how the HR/Payroll system works is by first looking at the big picture. The graphic below shows how our systems work together in ConnectCarolina.



Student Administration

The Student Administration part of ConnectCarolina, previously known as Campus Solutions, manages the business processes and information related to working with students at the University. For example, Student Administration is where students' financial aid is managed and where admissions are handled.

Student Administration is the source system for all biographic and demographic information for employees, students, and persons of interest (affiliates). When a person is hired or added as an affiliate in the system, the HR/Payroll system pulls the biographical and demographical (bio-demo) information on the person from Student Administration.

HR/Payroll

The HR/Payroll system supports the HR office in each school and division across campus, as well as the Office of Human Resources and other central offices. The HR/Payroll system also supports the management of personnel costs, including managing the sources that fund salaries.

The HR/Payroll system sends payroll and benefit transactions to Finance so that funding can be recorded in the correct accounts. Funding for faculty and staff is maintained at the department and position level.

Finance

The Finance system within ConnectCarolina supports the University's financial transactions, including purchasing, paying for goods and services, making deposits, and so on. The Finance system also provides support for the University's accounting and financial reporting.

Reporting

InfoPorte is the primary reporting tool for campus. For those who use the Finance systems, additional reporting is provided through queries and a reporting tool called nVision.

About the Person and the Work They Do

To begin working with the HR/Payroll part of ConnectCarolina, it's important to understand how you will work with the *person* and the *work* they do. ConnectCarolina stores information about the person and the work they do separately.

Setting Up the Person in the System

When you hire someone or begin a working relationship with the person as an affiliate, the first thing that needs to happen is that the person needs to be set up in ConnectCarolina as a **person**.

By the way, when we talk about "employees" and "affiliates," we are referring to the person's relationship with the University. From the perspective of ConnectCarolina, a person can have three types of relationships:

- An affiliate (for example, a volunteer)
- A contingent worker (such as a contractor)
- An employee

The person's relationship affects how much information is stored in ConnectCarolina and what kind of information. For example, for an affiliate, we won't enter information about the work the person is doing with the University. For an employee, we will.

If the person is an employee, the Background Check Office (in the Office of Human Resources) enters the person's bio/demo data into the system and assigns the person a PID. If the person is an affiliate, the PID Office sets the person up. Both offices take care to ensure that the person doesn't already exist in the system (for example, if they were a student at UNC-Chapel Hill). If the person is already in the system and already has a PID, the person keeps the same PID no matter what his or her role.

The bio/demo data is actually entered into the Student Administration system, although moving between the Student Administration and HR/Payroll systems is transparent.

Faculty and staff use the UNC-Chapel Hill directory to update their information.

Understanding How ConnectCarolina Tracks the Work that Faculty and Staff Do

In ConnectCarolina, there are three concepts that are important to understand when talking about the work faculty and staff do:

- job code, which is the job classification
- position
- job (or job record)

About Job Codes

For SHRA and EHRA non-faculty employees, what the State of North Carolina refers to as "job classifications" are set up in ConnectCarolina as **job codes**. Some examples of job codes are "Accountant" or "Human Resource Specialist."

For faculty, job codes equal faculty rank. Examples of faculty job codes are "Associate Professor" or "Instructor."

One job code includes information about all salary grades. For example, an SHRA job code includes the contributing, journey, and advanced salary grades. The job code also specifies the salary plan, which is the entire salary range for all salary grades.

About Positions

A position describes a particular job in a particular department. You can think of a position as an empty chair, because there isn't a specific person associated with a position. You assign a set of attributes to the chair and any person who "sits" in the chair inherits the attributes.

The advantage to positions is that you can define jobs in your department without having people in them. If a person leaves a position, the position stays and can be refilled.

In ConnectCarolina, positions include information like:

- Department
- Location
- Classification title
- FTE
- Competency level or faculty rank

Positions are required for all employees.

About Jobs (also called job records)

A job, or a job record, is a specific faculty or staff assignment. The job record is specific to a person. Some examples of job records include:

- Joe Smith, an Accounting Technician in the Chemistry Department
- Jane Doe, a Professor of Psychology in the College of Arts and Sciences

The job record is unique to a faculty or staff member, and specifies information such as:

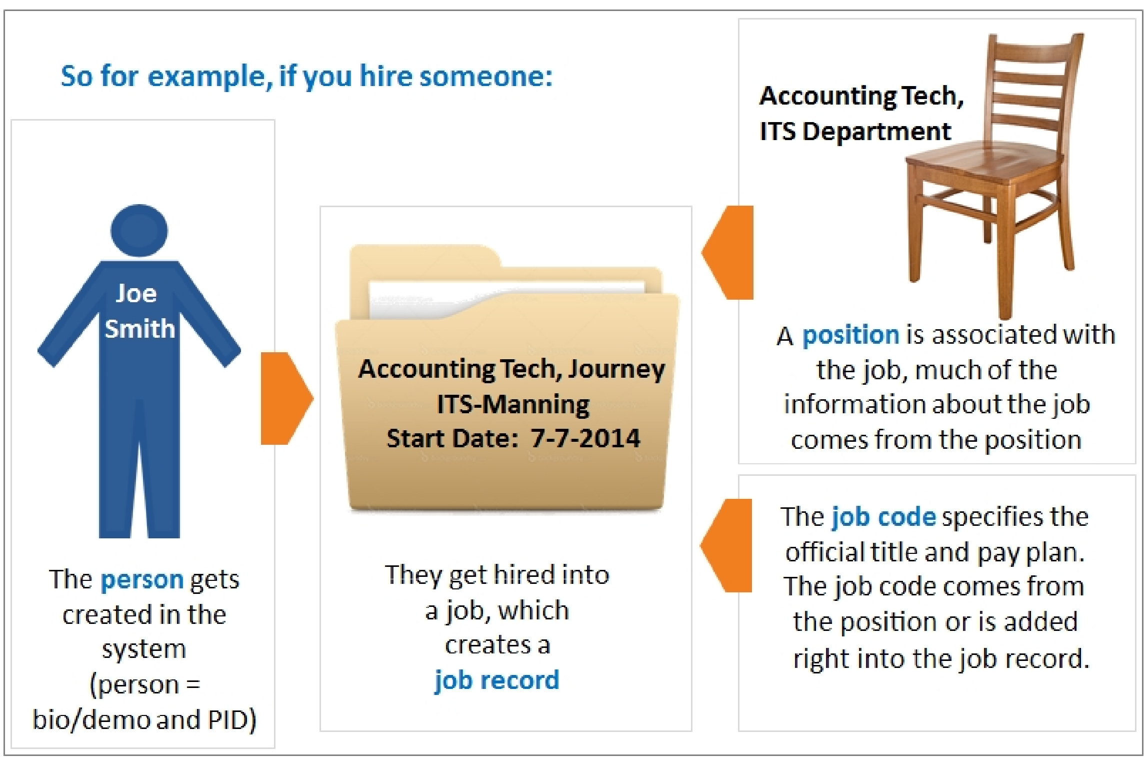
- the rate of compensation
- the date the person was hired

- job actions that have been completed for the person, such as transfers and leaves of absence
- for SPA employess, the person's longevity

If someone has more than one job at the same time, they have a job record for each job they hold. For example, a faculty member who is both a professor and a department chair would have two separate job records.

Fitting it All Together

This graphic describes how the person, job record, position, and job code fit together in ConnectCarolina:



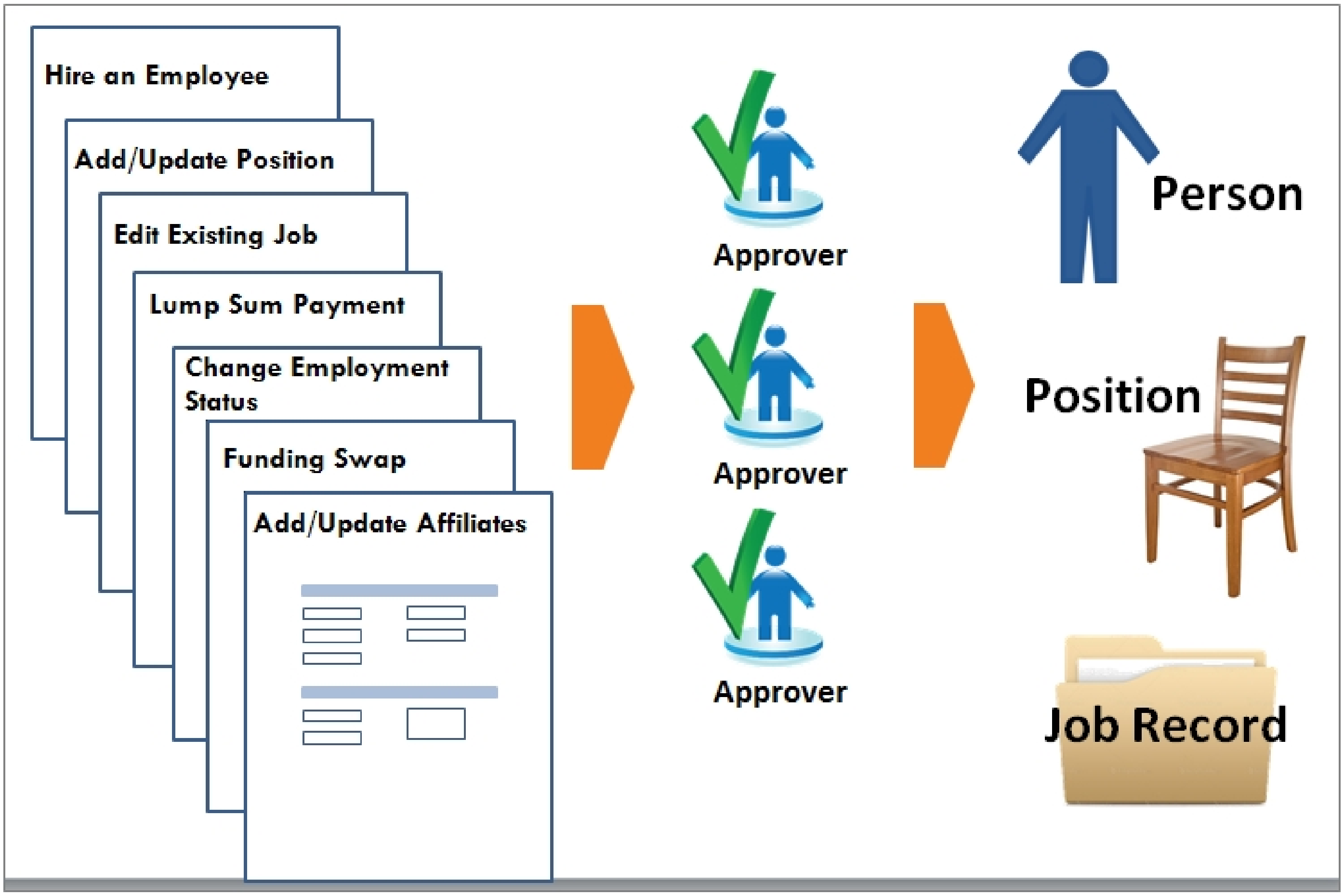
About HR Actions

To create and submit HR actions in ConnectCarolina, you use *ePAR forms*. ePAR stands for *Electronic Personnel Action Request*. These online forms walk you through providing the correct information for each type of action, and then when you submit the form, the system routes it through the approval process set up for that type of ePAR. After all the approvers have approved the action, ConnectCarolina updates the person, position, or job, depending on which form you used.

The seven ePAR forms are:

- **Hire an Employee**: Used to enter all hires, rehires, transfers, and secondary jobs. See *Using the Hire Form, page 1* for more information.
- **Edit Existing Job:** Used to make changes to an existing job, including changing the pay rate and the working title. See *About Updating Job Data, page 1* for more information.
- **Change Employment Status:** Used to enter terminations, leaves of absence, and return from leaves of absence. See *About Employee Status Changes, page 1* for more information.
- **Add/Update Position:** Used to add, update, or inactivate positions. See *Managing Positions, page 1* for more information.
- **Funding Swap**: Used to change the sources used to fund a person or position. See *Entering a Funding Swap, page 1* for more information.
- **Lump Sum Payment:** Used to submit a lump sum payment (sometimes called a "one-time payment") for an employee. See *Submitting a Lump Sum Payment, page 1* for more information.
- **Add or Update an Affiliate**: Used to add a new affiliate or to make changes to an existing one. See *About the Affiliate Form, page 1* for more information.

Important: Be sure to submit ePARs in time to meet the campus data-entry deadlines. Current schedules for bi-monthly and monthly pay periods are posted on the Office of Human Resources website.


Hire an Employee
Add/Update Position
Edit Existing Job
Lump Sum Payment
Change Employment Status
Funding Swap
Add/Update Affiliates
Approver
Approver
Approver
Person
Position
Job Record

Understanding Funding Sources

Several ePAR forms let you enter funding sources, which are the instructions for which accounts cover an employee's compensation. You can enter funding in two ways:

- By entering a *chartfield string*
- By entering a code called a *combo code*

About the Chartfields

The chartfields are twelve fields that work together to specify where funding should be charged. It's easier to think of them in three groups:

- The five core chartfields that need to be on every chartfield string
- The three chartfields used with contracts and grants
- The four chartfields that departments can choose to use

This section takes a brief look at the chartfields, but you can learn more by watching the computer-based training on the chartfields, which you can find on the Training page of the ccinfo.unc.edu website.

The five required chartfields are:

- **Business Unit**, which specifies either UNC-Chapel Hill, General Administration, or a foundation
- **Fund** and **Source**, which together specify where the money is coming from (for example, fund might specify that it's an endowment and source specifies which endowment)
- **Account**, which specifies what the money is being spent on (for example, personnel)
- **Department**, which identifies the department providing the money

The three chartfields used for contracts and grants are:

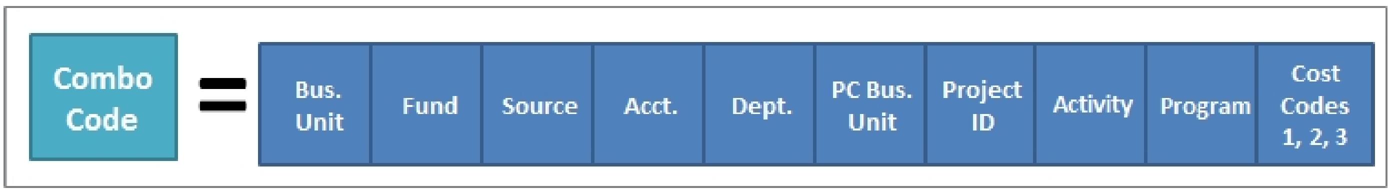
- **PC Business Unit**, which specifies the Office of Sponsored Research
- **Project ID**, which identifies the contract or grant
- **Activity ID**, which is always **1**

Each school or division chooses which of the remaining four chartfields they use and how they will use them:

- **Program**
- **Cost Code 1**
- **Cost Code 2**
- **Cost Code 3**

About Combo Codes

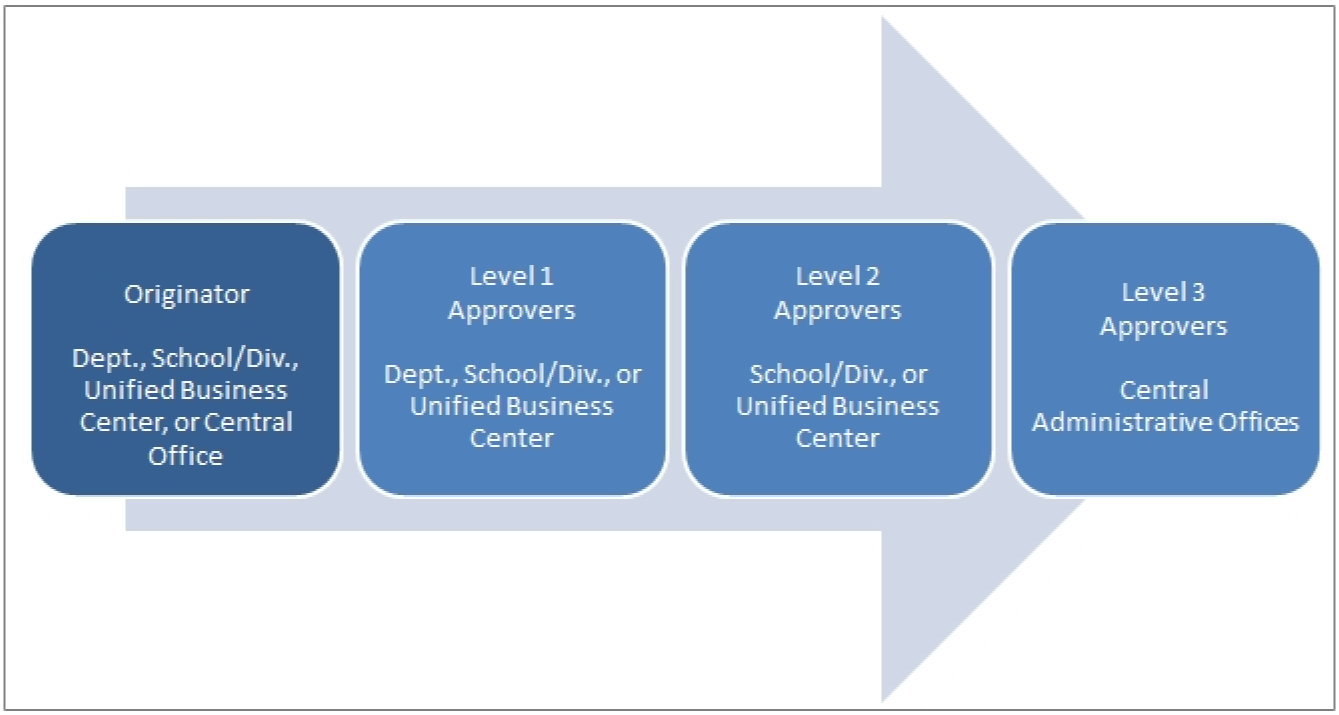
A combo code is a nine-digit code that represents an entire chartfield string. Combo codes are created "on the fly," meaning the first time a chartfield string is used on the HR side, ConnectCarolina generates a new combo code. When you enter the funding source on the ePAR forms, you can enter either the combo code or the chartfield string.



About Approvals and Notifications

When you submit an ePAR, the system starts the ePAR on the approval path defined for that type of ePAR. An approver can choose to approve the form, recycle the form (send it back to the originator for resubmission), or deny the form. In addition to approvers, other employees can be named as *reviewers*, who receive notification that an ePAR has been submitted for approval. Unlike approvers, reviewers can't make changes to the ePAR and they can't approver or deny them. After the final approver in the approval process approves the ePAR, the action is completed and, depending on what type of ePAR it is, the person, job, or position is updated in the system.

The graphic below shows a sample approval process. Each process can have up to three levels of approval.



1

Managing Positions

A position describes a particular job in a particular department or location, but without a specific person associated with it. That means that if the person occupying the position leaves, you can hire a new person into the same position. Four major components make up a position:

- Job code (for information on job codes, see *ConnectCarolina: An Integrated System, page 4*)
- Department
- Location
- Full-time equivalency (FTE)

Positions are required for all employees. Most EHRA non-faculty and all SHRA positions only have one incumbent.

Putting More than One Incumbent in a Position

To put more than one incumbent in a position, the following information must be identical for each incumbent. Some of these are not visible on the ePAR forms, but you can see them on the position information (see *Seeing Information About a Position, page 17*).

- Position number
- Effective date of the position
- Position status
- Status
- Business unit
- Job code
- Regular or temp
- Title
- Full-time or part-time
- Regulatory region
- Department
- Location
- Classified indicator

Positions for Students

The position first needs to be created in ConnectCarolina before you can hire a student into it. For students who have multiple jobs, you need to create separate, individual positions. It's important to know that there is a one-to-one relationship between a student and each hourly job he or she has. That's because TIM (the time management system used on campus) needs the one-to-one relationship to accurately associate the hours logged with work performed. Also, when a student holds multiple jobs, you need to communicate with the other departments to ensure the total number of hours scheduled do not exceed recommended FTE levels.

> **Important:** Submit ePARs in line with the campus data-entry deadlines. Current schedules for bi-monthly and monthly pay periods are posted at https://finance.unc.edu/services/payroll-preparation-and-distribution/.

For more information about student job codes, job families, and recommended FTE levels, see *Understanding Students in ConnectCarolina, page 1*.

Viewing Position Information

You can view position information to see information about the current incumbent and to see a history of the transactions against the position. The details of a position include:

- summaries
- education requirements
- position attributes that are specific to UNC-Chapel Hill or General Administration

For more information, see *Seeing Information About a Position, page 17*.

Creating a New Position

New positions can be:

- an exact copy of an existing position
- a modified version of an existing position
- a completely new position

For more information see:

- *Creating a New Position, page 1*
- The Student Actions guide

Updating an Existing Position

A position update is any change to existing position information, which you initiate with the Add / Update Position ePAR.

For more information, see:

- *Making Changes to a Position, page 1*
- *Inactivating a Position, page 1*

Seeing Information About a Position

You can see information about a position such as who is occupying the position or see all actions completed for the position.

Using the Add/Update Position Info Link

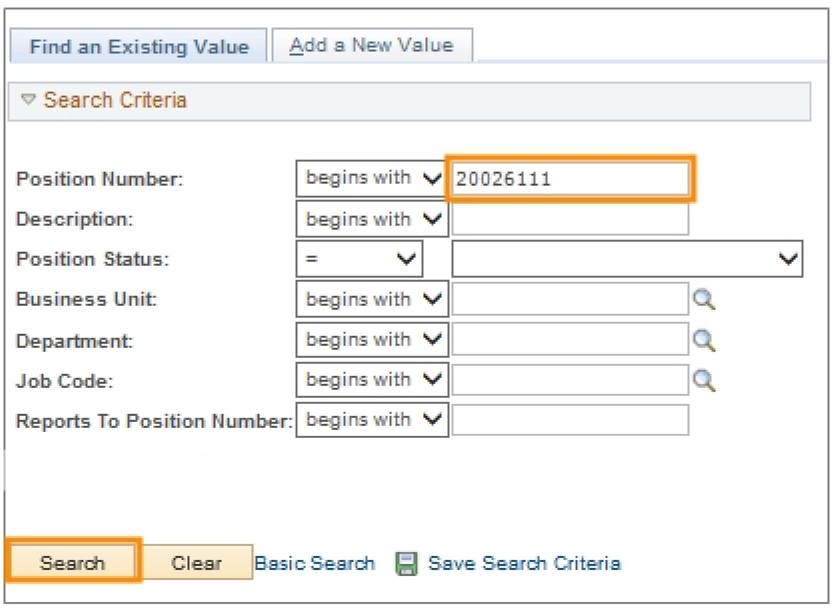
Follow these steps:

1. Choose this menu option:

   From the Admin WorkCenter home page, choose HR WorkCenter > ePAR Home Page > Add/Update Position Info

2. In the Position Number field, enter the position number and click the **Search** button.

   Note: This is the best way to find a specific position.



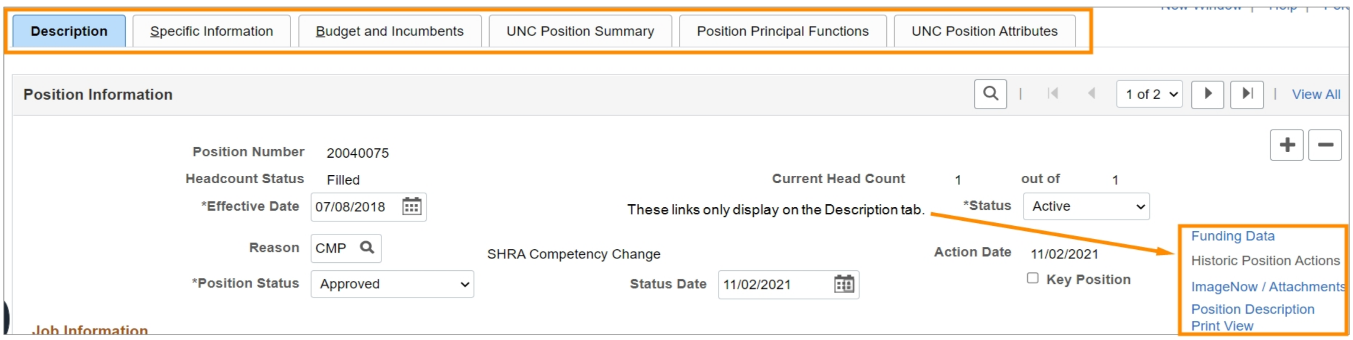
   Result: The system displays the Description tab for the position you entered.

3. You can see information about the position by clicking the following tabs or links:

   - Description
   - Specific Information
   - Budget and Incumbents
   - UNC Position Summary

- Position Principal Functions
- UNC Position Attributes
- Funding Data
- Historic Position Actions
- Image Now / Attachments

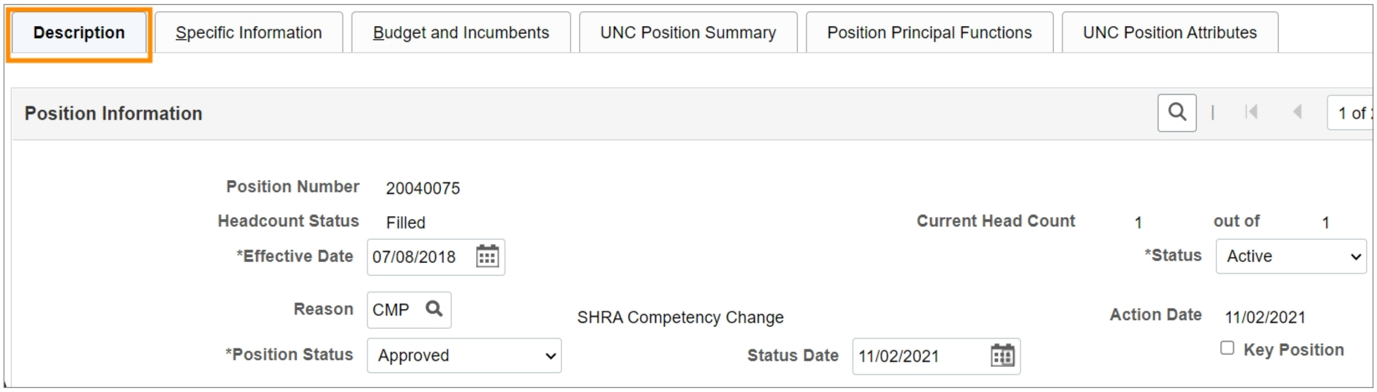
Refer to the sections below for details about the information that's displayed on each tab or link.



Description

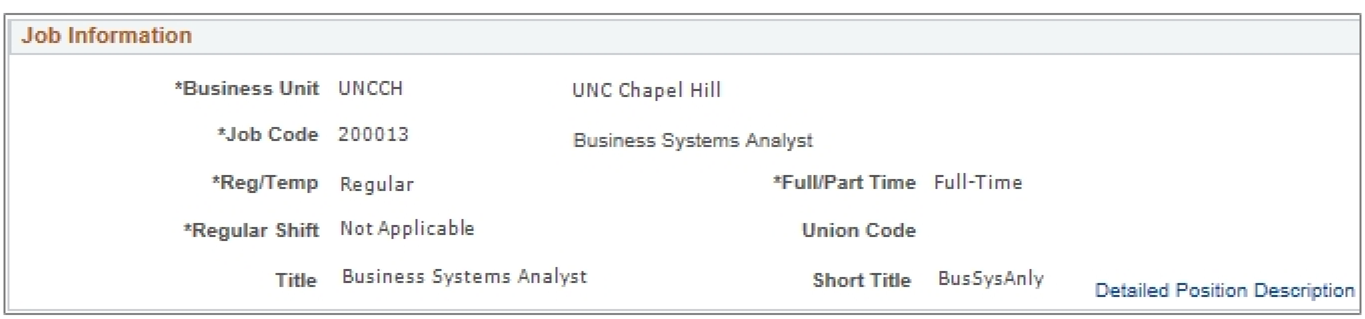
In the Position Information section, you can see this information in the fields:

This field:	Defines the following:
Position Number	A unique number assigned by the system when the position was added.
Headcount Status	Indicates whether the position has reached its allocated number of incumbents.
Current Head Count	The number of employees in the position. For SHRA positions, this number is always one, because TIM requires a one-to-one match between a person and a position.
Effective Date	The date the position goes into effect.
Status	Shows whether the position is Active or Inactive.
Reason	The reason for the position action. **Note:** For a new position, the system fills in the code as New.
Action Date	The date the transaction was entered.
Position Status	Shows when the position is Approved, Frozen, or Proposed.
Status Date	The date the status became Active or Inactive.
Key Position	This field is not used at UNC-Chapel Hill.



In the Job Information section, you can see this information in the fields:

This field:	Defines the following:
Business Unit	The school or division where the position is located.
Job Code	The job classification. One job code includes all salary grades. For example, an SHRA job code includes the contributing, journey, and advanced salary grades. The job code also specifies the salary plan, which is the entire salary range for all salary grades. For faculty, job codes equal faculty rank. Some examples of faculty job codes include Associate Professor or Instructor.
Reg/Temp	Identifies whether the position is Regular or Temporary, as defined by North Carolina State statute.
Full/Part Time	Identifies whether the position is full-time or part-time.
Regular Shift	This field is not used at UNC-Chapel Hill.
Union Code	This field is not used at UNC-Chapel Hill.
Title	Same as the title associated with the job code.
Short Title	A 12-character limited title for the position.
Detailed Position Description	Click the **Detailed Position Description** link to see a detailed description of the position.

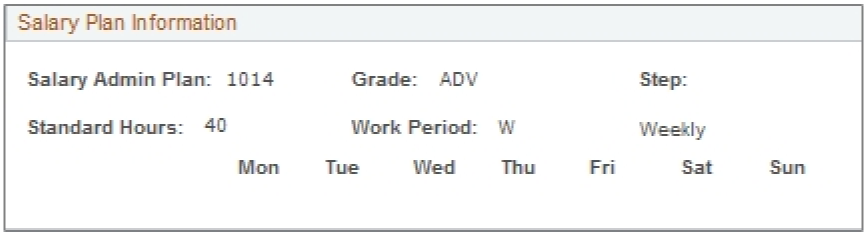


In the Work Location section, you can see this information in the fields:

This field:	Defines the following:
Reg Region	This field is always USA.
Department	The home department of the position.
Company	The company is one of the following: • UNC General Administration (GAD) • UNC Chapel Hill (UNC)
Location	The physical location of the position.
Reports To	The position number that this position reports to.
Dot-Line	This field is not used at UNC-Chapel Hill.
Supervisor Lvl	This field is not used at UNC-Chapel Hill.
Security Clearance	This field is not used at UNC-Chapel Hill.

In the Salary Plan Information section, you can see this information in the fields:

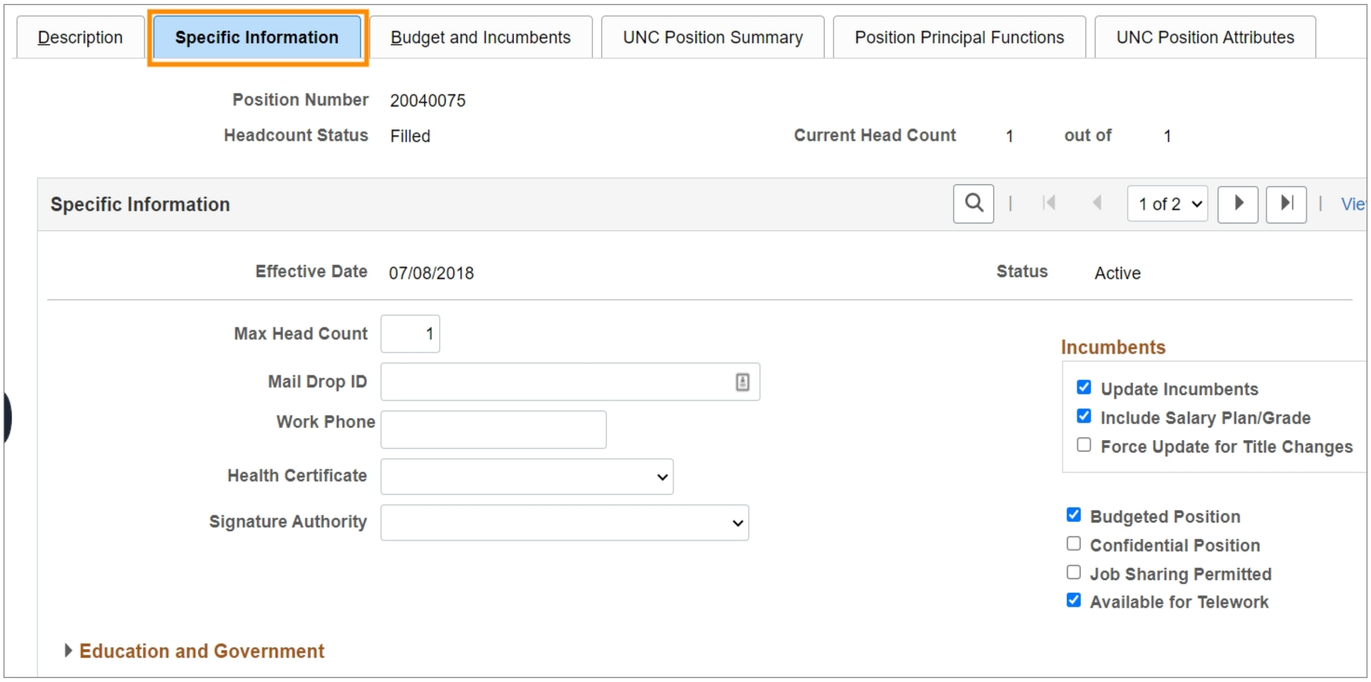
This field:	Defines the following:
Salary Admin Plan	The salary plan for this position, which the system fills in from the job code.
Grade	The salary grade for this position, which the system fills in from the job code.
Step	This field is not used at UNC-Chapel Hill.
Standard Hours	The number of hours the person in this position works in a week. The system fills this in from the job code, based on full-time status, or as edited for part-time persons.
Work Period	The system fills in W for Weekly.
Mon-Sun	Identifies the standard number of hours worked each work day, which the system fills in from the job code. This is usually the total number of standard hours averaged over five days.



Specific Information

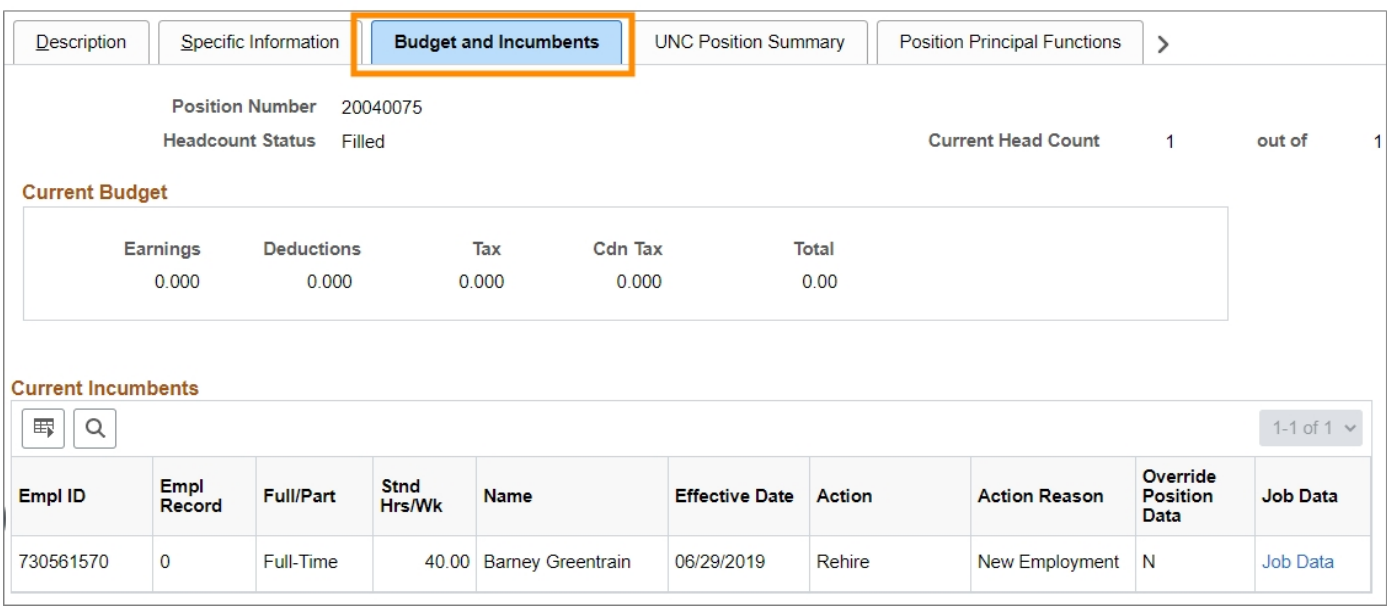
On the Specific Information tab, you can see this information in the fields:

This field:	Defines the following:
Max Head Count	The number of incumbents allowed in the position. For SHRA positions, this number is always one, because TIM requires a one-to-one match between a person and a position.
Mail Drop ID	This field isn't used at UNC-Chapel Hill.
Work Phone	This field isn't used at UNC-Chapel Hill.
Health Certificate	This field isn't used at UNC-Chapel Hill.
Signature Authority	This field isn't used at UNC-Chapel Hill.
Update Incumbents	Shows whether the system automatically updates the incumbent job and employment data when the position is updated.
Include Salary Plan/Grade	Shows whether the system automatically includes the incumbent salary information.
Budgeted Position	This field isn't used at UNC-Chapel Hill.
Confidential Position	This field isn't used at UNC-Chapel Hill.
Job Sharing Permitted	This field isn't used at UNC-Chapel Hill.
Available for Telework	This field isn't used at UNC-Chapel Hill.



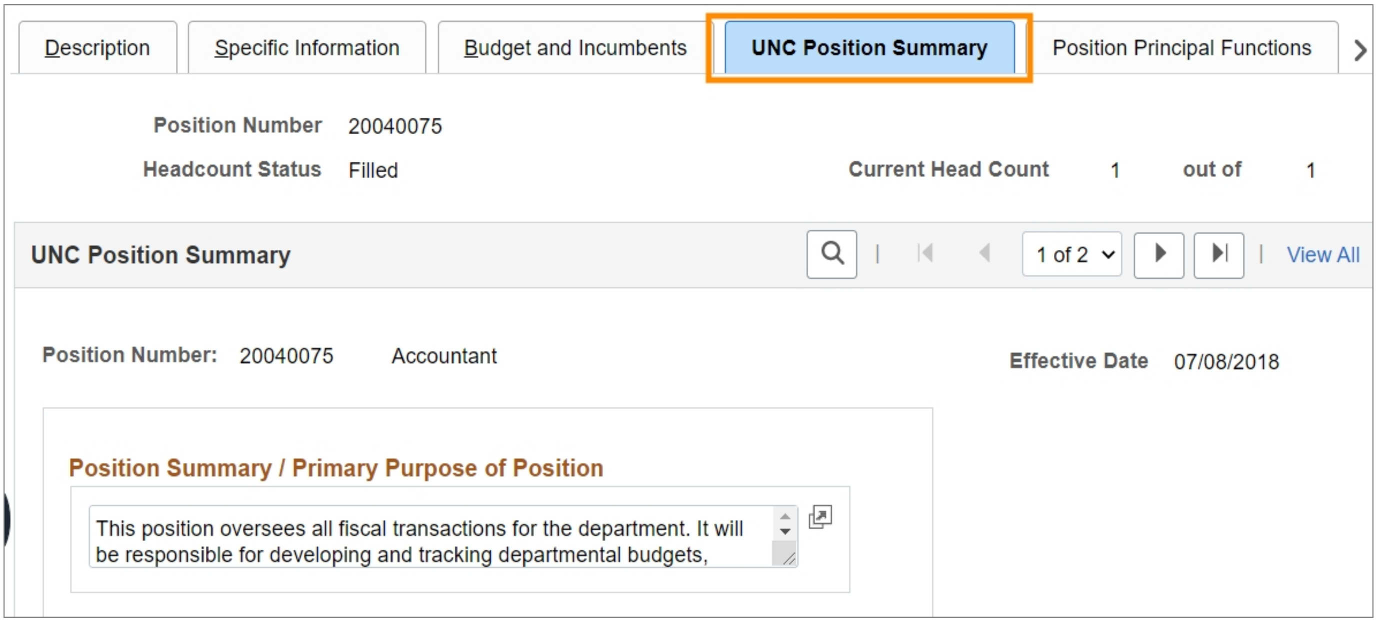
Budget and Incumbents

The Budget and Incumbents tab displays budget information and compensation information about the employee that is currently in the position. The employee's information comes from the Job Data Page. For more information see *Seeing Information About an Employee's Job, page 28.*



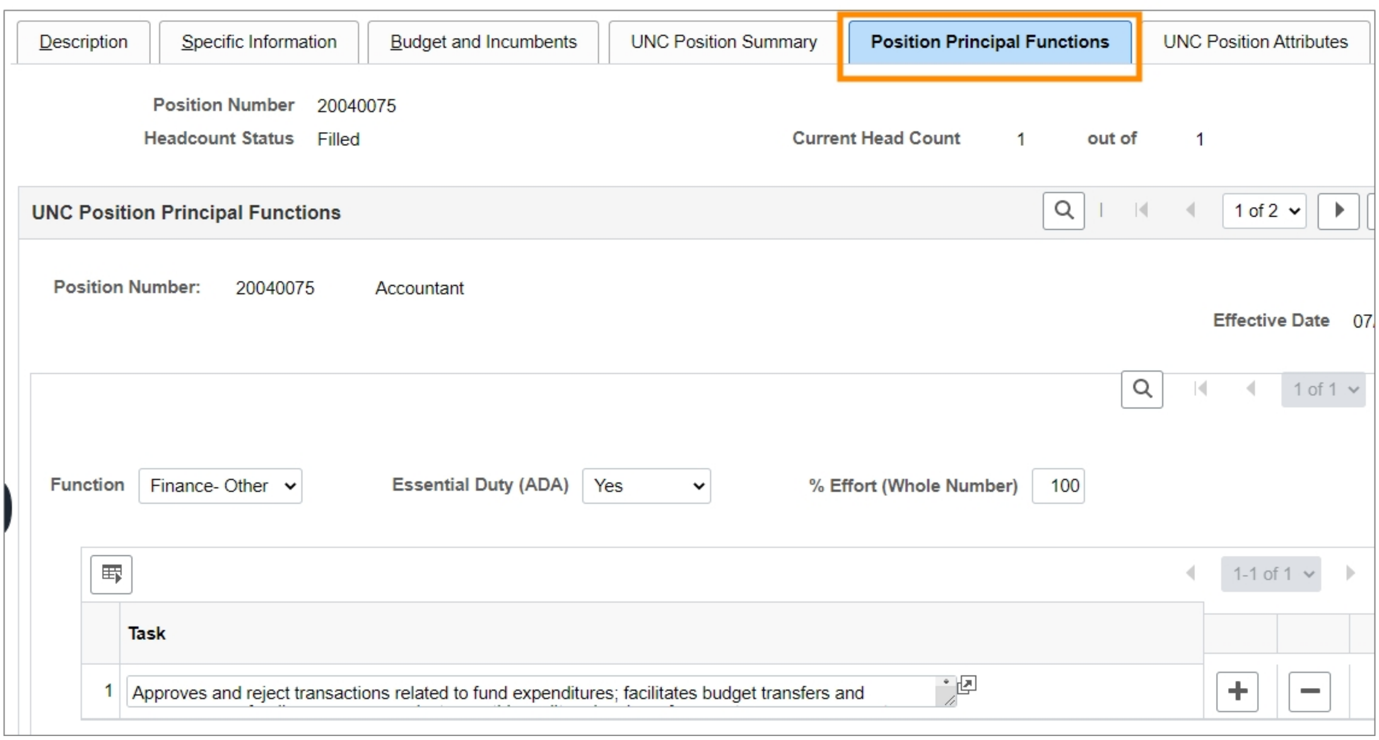
UNC Position Summary

The UNC Position Summary tab has information about the position, such as a position summary, minimum education and experience requirements, and position competencies.



Position Principal Functions

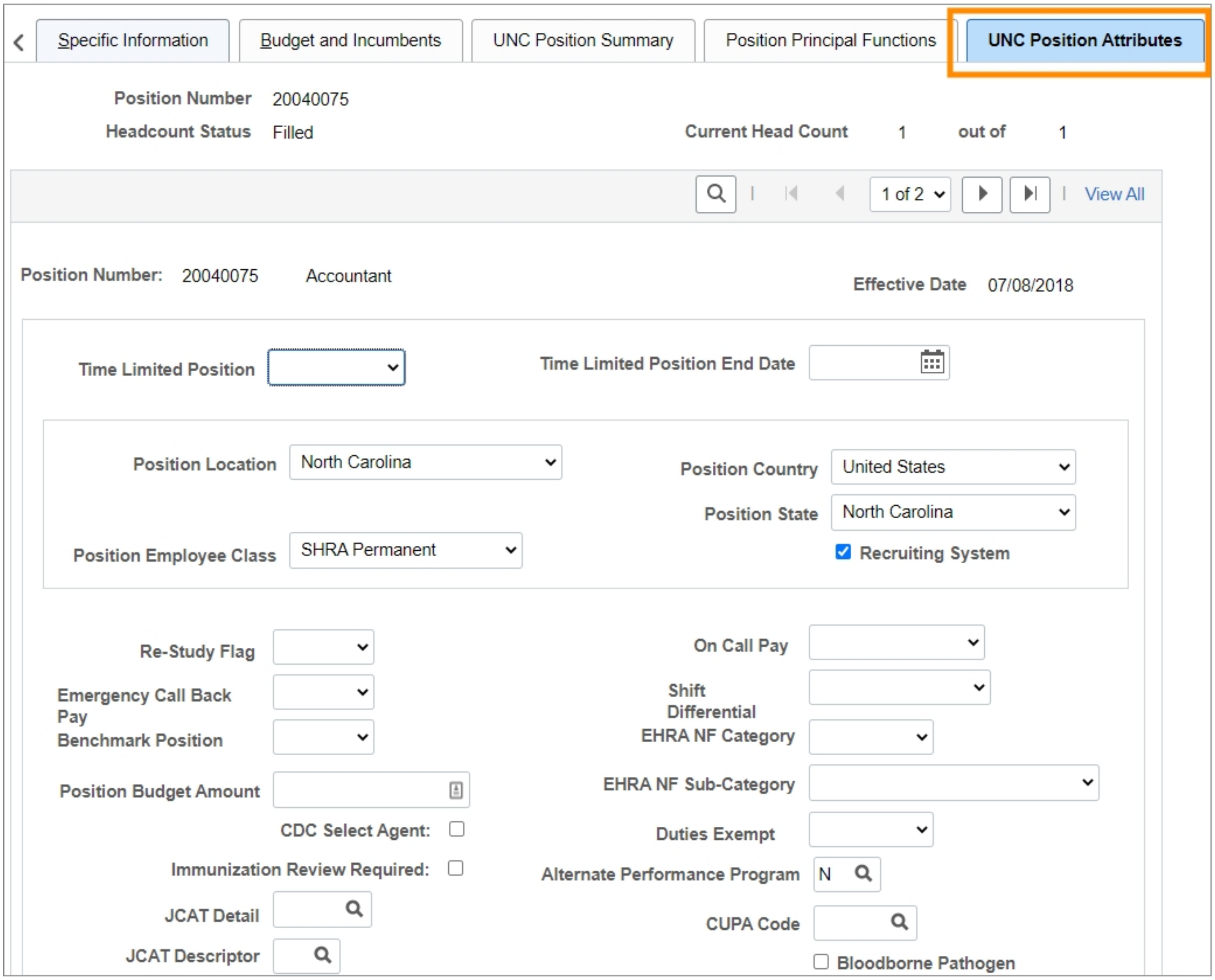
The UNC Position Principal Functions tab list the principal functions for SHRA and EHRA Non-Faculty positions. Each function has one or more tasks and all the principal functions add up to 100%



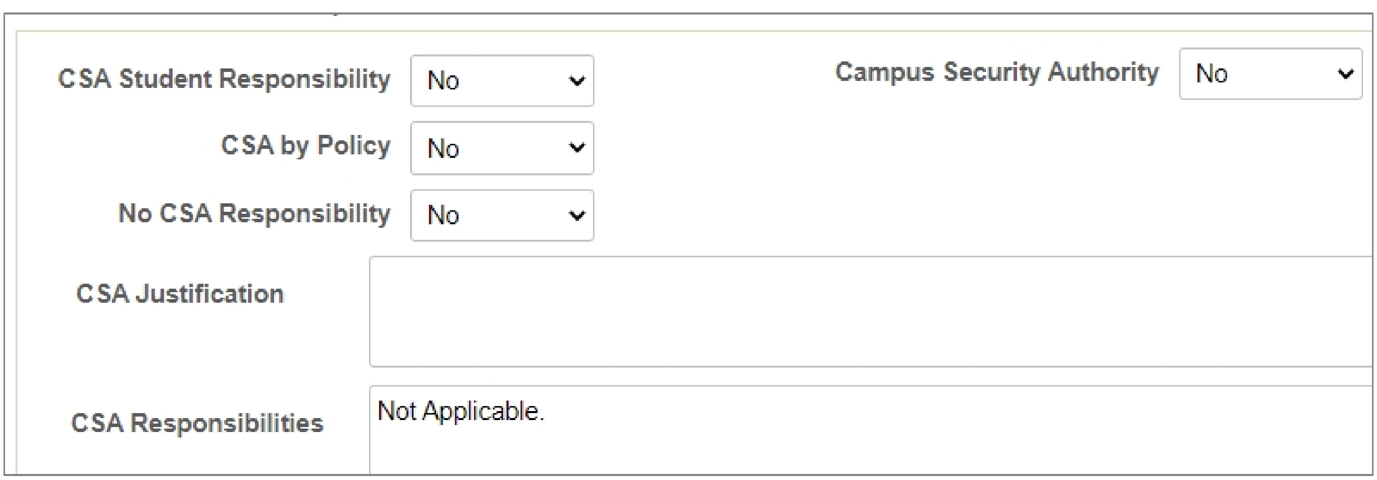
UNC Position Attributes

You can see this information in the fields:

This field:	Defines the following:
Time Limited Position	Identifies if the SHRA position is time-limited.
Time Limited Position End Date	Identifies the end date for a time-limited SHRA position.
Re-Study Flag	Identifies if the position must be reviewed on vacancy.
On Call Pay	Identifies if the SHRA position is eligible for on-call pay.
Emergency Call Back Pay	Identifies if the SHRA position is eligible for emergency call-back pay.
Shift Differential	Identifies which shift differential this SHRA position is eligible for.
Benchmark Position	OHR use only.
EPA NF Category	Identifies category ranks for EHRA non-faculty positions only.
Position Budget Amount	Identifies the budgeted amount expected to be paid to the position. **Note:** This field doesn't drive the actual salary of the employee in this position.
Duties Exempt	Identifies if the position's duties meet the Department of Labor's requirements for exemption.
Immunization Review Required	This checkbox designates positions that have employees entering facilities where patient care is provided, whether in a patient care area or in an administration wing. This box will flag the position for the Immunization Review program per UNC EHS guidelines (https://ehs.unc.edu/ueohc/requirements/)
Bloodborne Pathogen	This checkbox designates positions with potential exposures to blood or bodily fluids. (https://ehs.unc.edu/biological/bbp/) This box will flag the position for bloodborne pathogen training and surveillance.
Recruiting System	This checkbox shows whether position data is sent to PeopleAdmin. In most cases the field is hidden because the position type will always be sent or never be sent. This field will be visible for: • Faculty • Faculty Intermittent • EHRA Non-Faculty • EHRA Non-Faculty Zero Base



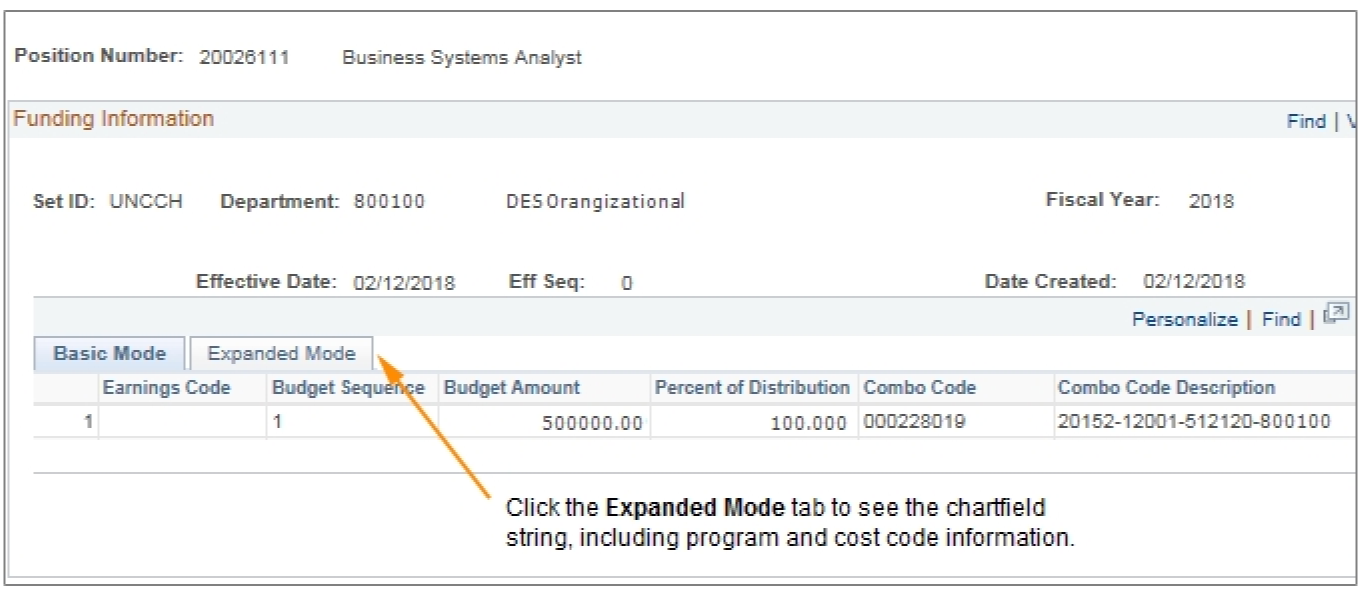
At the bottom of the UNC Position Attributes tab, you can see if the employee is designated as a Campus Security Authority. Campus Security Authorities are required to report any Clery qualifying crimes that they become aware of to the University's Clery Act Compliance Coordinator.

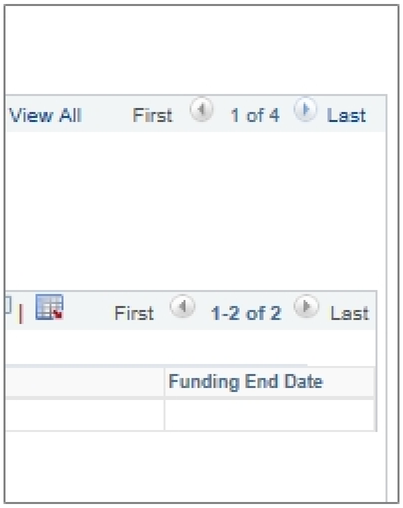


Funding Data

On the Funding Data link, you can see this information in the fields:

This field:	Defines the following:
Earnings Code	This field is always blank.
Budget Sequence	The budget sequence is always 1, regardless of how many rows there are.
Budget Amount	The dollar amount budgeted for the position from the source of funding on that row.
Percent of Distribution	The percent of the budgeted amount of salary for the position that is paid from the source of funding on that row.
Combo Code	The number used to represent a specific chartfield string.
Combo Code Description	The Fund-Source-Account-Department for all fund types, except OSR and cost share. For OSR and cost share chartfield strings, combo code descriptions are Fund-Source-Account-Project ID
Funding End Date	The last day the position is scheduled to be paid from the source of funding on that row. Departments use this field at their discretion.





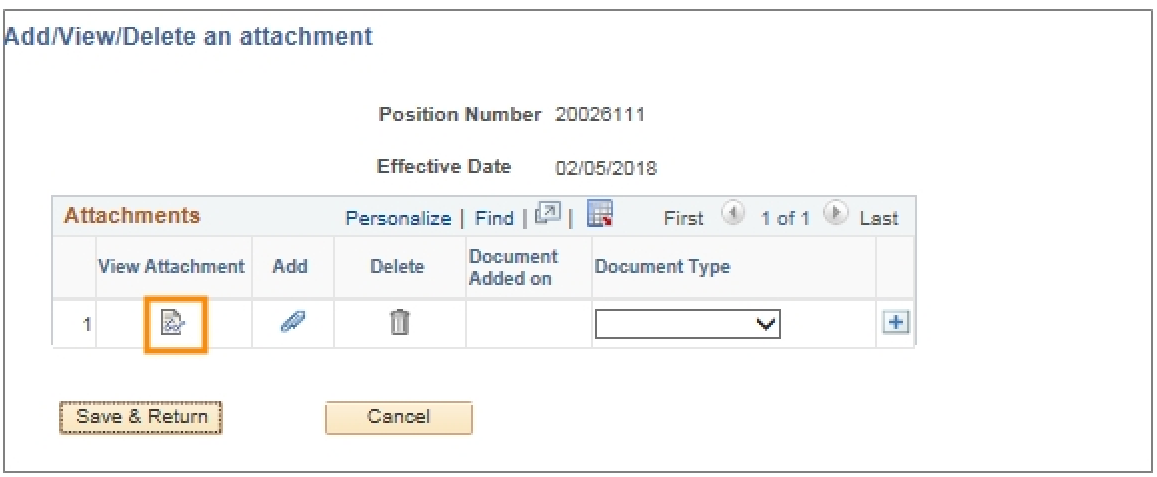
Historic Personnel Actions

The Historic Personnel Actions link takes you to the Historical Action System where you can see information about personnel actions for the employee that were executed before ConnectCarolina went live on October 1, 2014.

Image Now / Attachments

On the Image Now / Attachments link, you can see any attachments that have been uploaded to ePARs for the position.

Click the **View Attachment** icon to open the attachment.



Seeing Information About an Employee's Job

You can see information about an employee and his or her employment history on the Job Data page which consists of multiple tabs and links. The Job Data page displays current, future, and some historical employment actions.

Using the Job Data Link

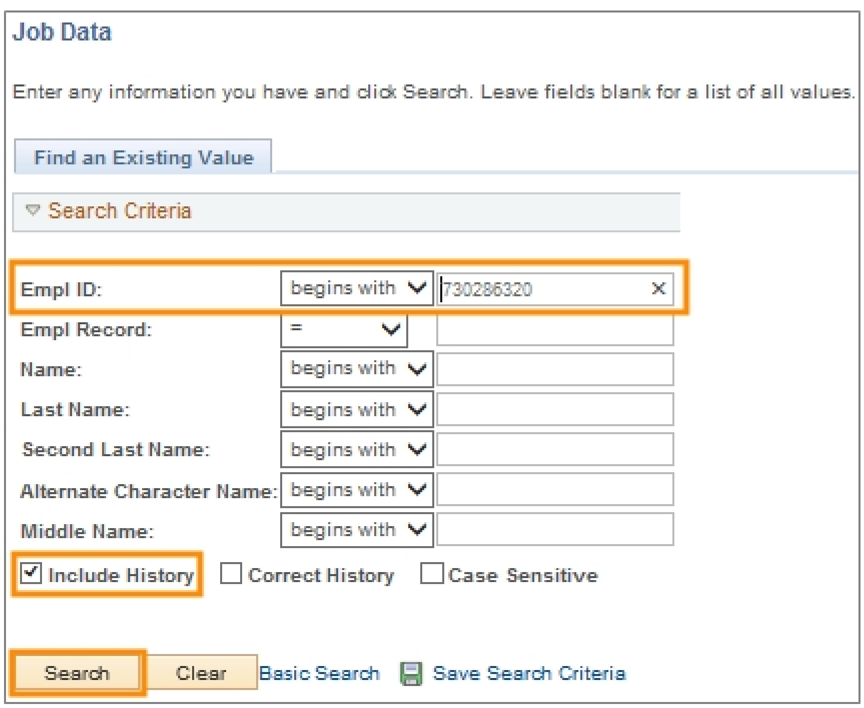
Follow these steps:

1. Choose this menu option:

   From the Admin WorkCenter home page, choose HR WorkCenter > Job/Positions > Job Data

2. Complete the fields and click the **Search** button.

In this field:	Do the following:
Empl ID	Enter the employee's PID.
Include History	Mark this checkbox to see all actions for this employee.



Results:

- If the employee has only one employee record, the system displays the Work Location page. Skip to step 5.

- If the employee has more than one job record, the system displays a list for you to choose from. Go to the next step.

3. Choose the employee record you need from the Search Results list to go to the Work Location page.

   Note: If you choose an employee with more than one job record, you can click the **Previous in List** or **Next in List** buttons to see their other employee records.

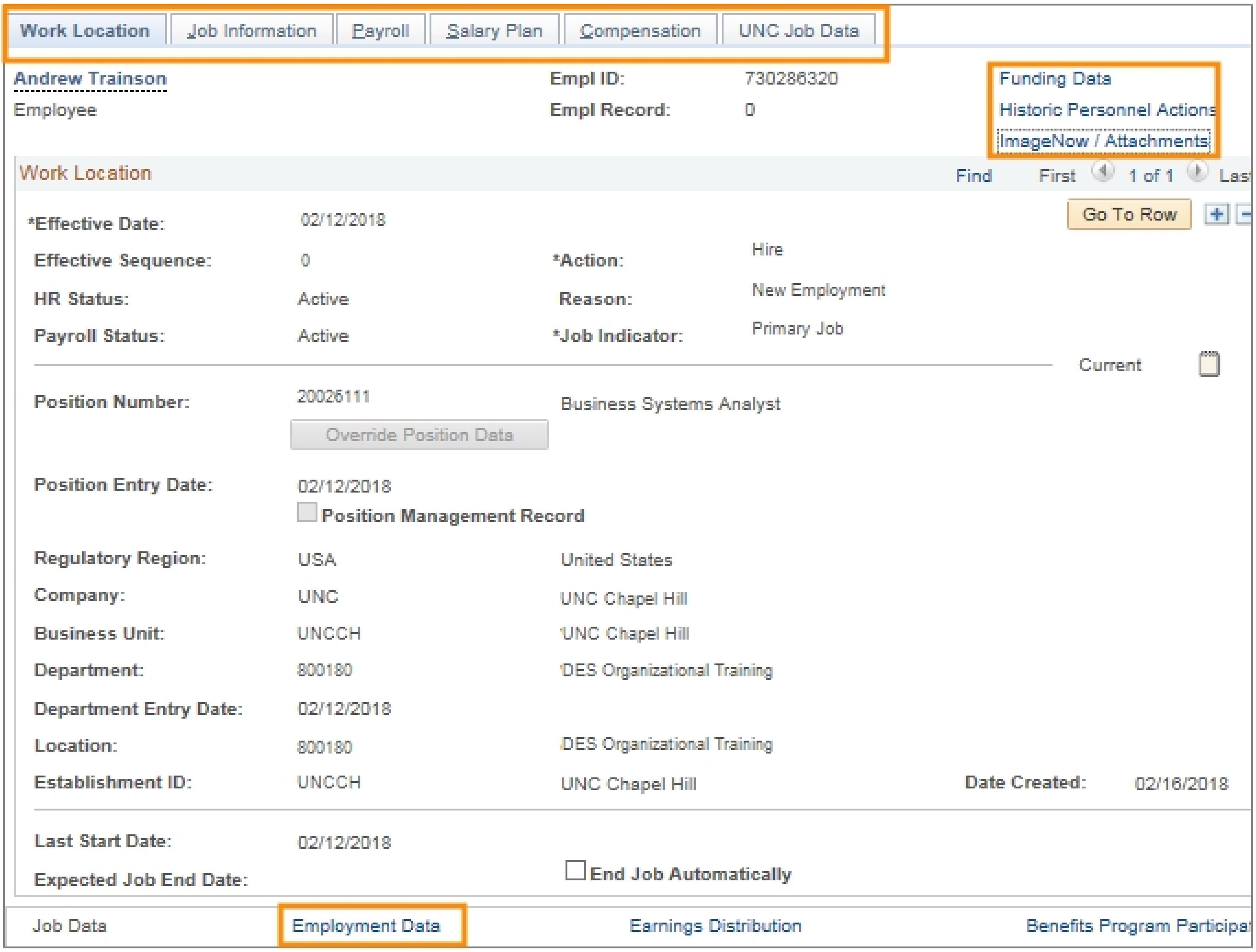
   Result: The system displays the employee's information on the Work Location page.

4. You can see the employee's information by clicking the following tabs or links:

   - Work Location
   - Job Information
   - Payroll
   - Salary Plan
   - Compensation
   - UNC Job Data
   - Funding Data
   - Historic Personnel Actions
   - Image Now / Attachments
   - Employment Data

   Refer to the sections below for details about the information that's displayed on each tab or link.

   Note: The bottom of the Job Data page has links to other pages with more information about an employee's job. The **Earnings Distribution** link only contains display information for Postdoctoral Fellow/Trainees with a FICA exemption and it is primarily used by Payroll. The **Benefits Program Participation** link is only relevant to the Benefits Team.

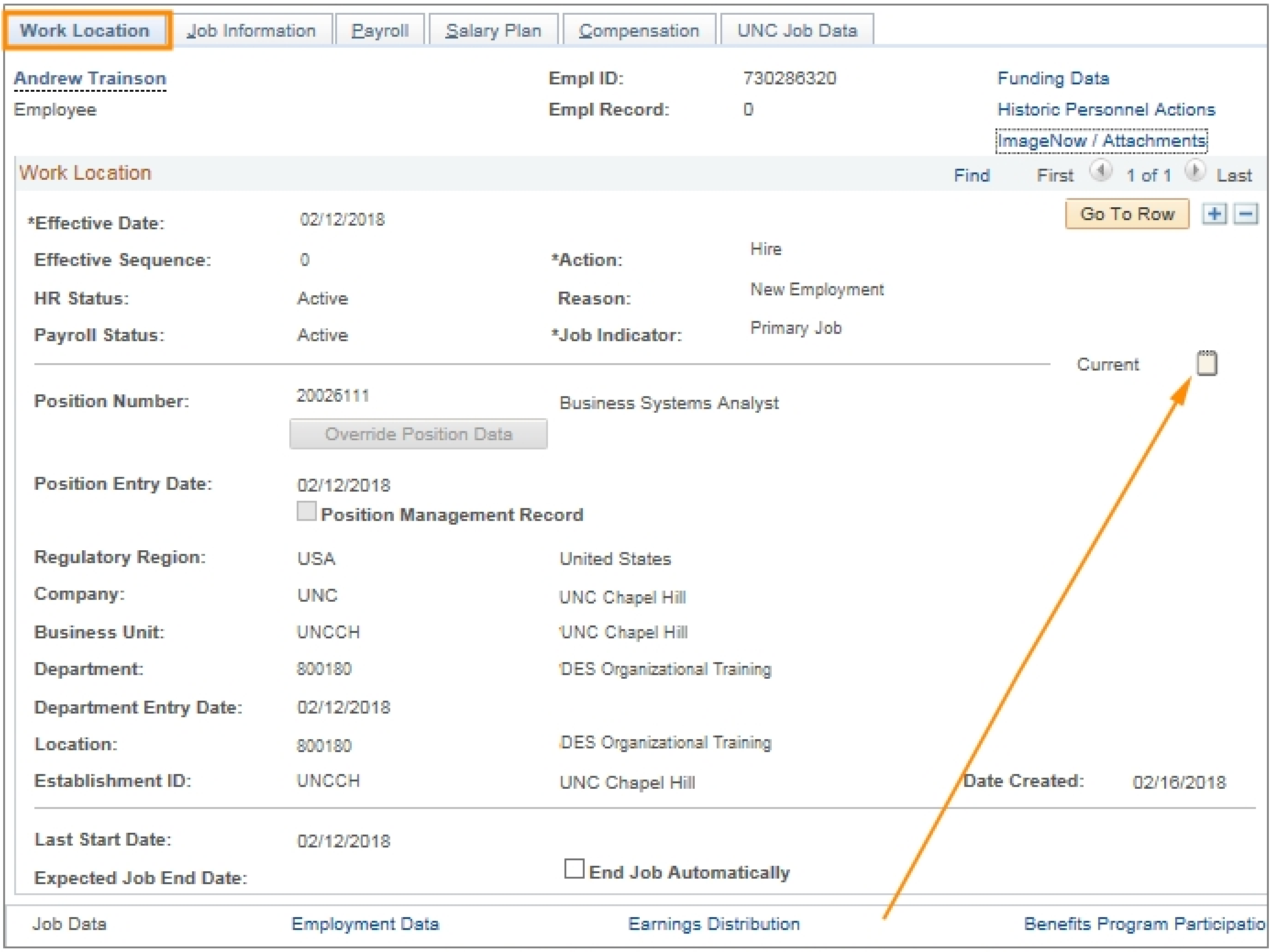


Work Location

On the Work Location tab, you can see this information in the fields:

This field:	Defines the following:
Empl ID	The employee's PID.
Empl Record	The number of the employee record you are viewing. Each job the employee holds at UNC-Chapel Hill has a unique employee record.
Effective Date	The date the action took effect.
Effective Sequence	If more than one job action was entered on the same date, the sequence number keeps them separate. The first action has effective sequence number 0, the second 1, and so on.
HR Status	The employee's employment status for the job you are viewing.
Payroll Status	The employee's payroll status for the job you are viewing.

This field:	Defines the following:
Action	The action used to change an employee record.
Reason	The reason an employee record was changed.
Job Indicator	Shows whether this is the person's primary or secondary job for this organizational relationship.
Position Number	The position number and position title.
Position Entry Date	The date the employee entered the position.
Position Management Record	This box will be checked if the job data row came from a position change.
Regulatory Region	The system always shows USA in this field.
Company	The company is one of the following: • UNC General Administration (GAD) • UNC Chapel Hill (UNC)
Business Unit	The business unit of the school or division.
Department	The home department number and description of the position.
Department Entry Date	The date the employee is assigned to a specific department.
Location	The physical location of the position.
Establishment ID	The company.
Last Start Date	The most recent start date for the employee without a break in service.
Expected Job End Date	The termination date for this job.
End Job Automatically	Indicates if the system should automatically terminate the job on the expected job end date. This field is only used for SPA temporaries or SPA students.



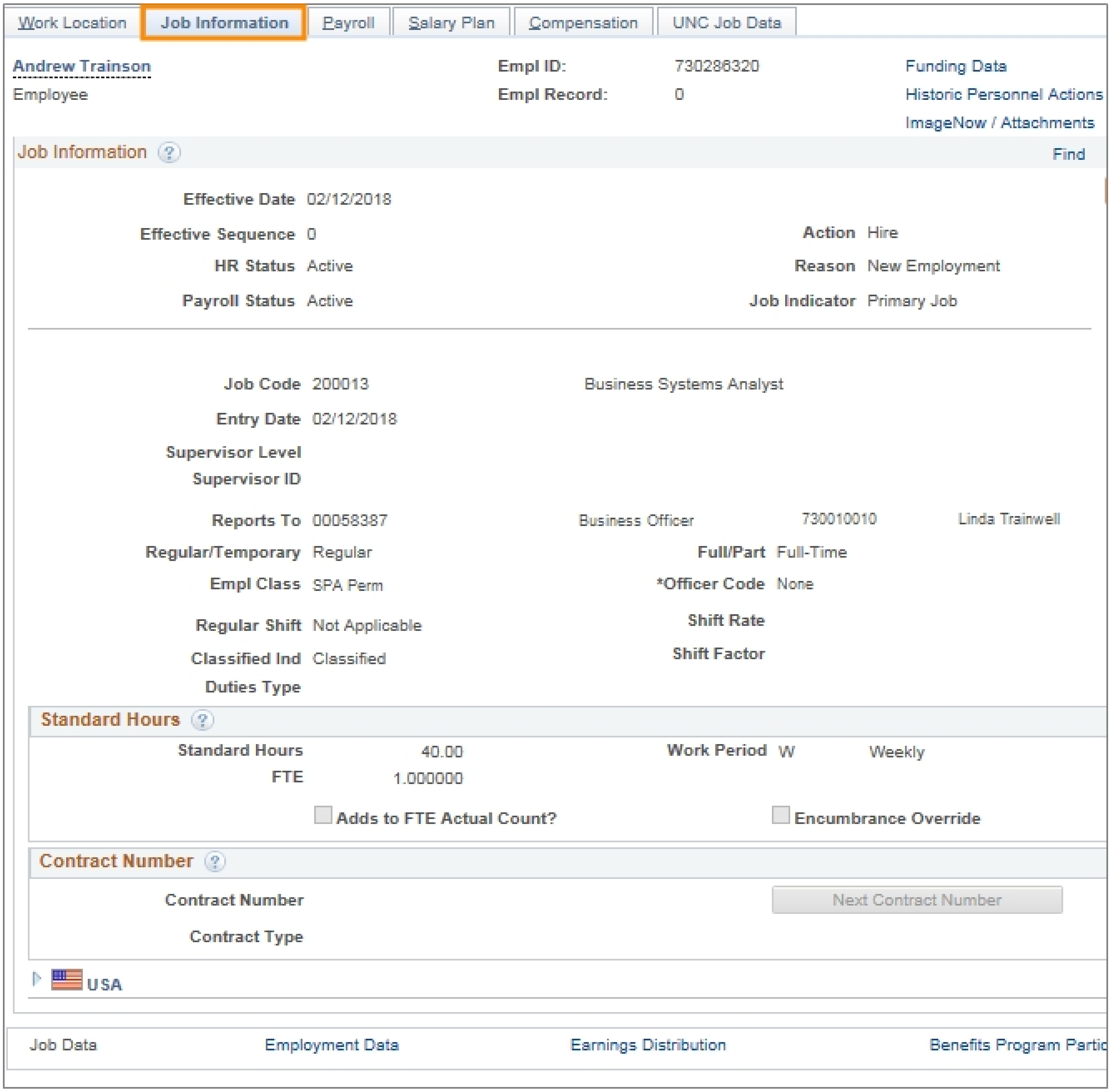
If the **Notepad** icon has lines on it, click on it to view notes on the employee's job data. If the Notepad icon is blank, there are no notes.

Job Information

On the **Job information** tab you can see this information in the fields:

This field:	Defines the following:
Job Code	The job code number and the job title.
Entry Date	The job code entry date.
Supervisor Level	This field is not used at UNC-Chapel Hill.
Supervisor ID	This field is not used currently at UNC-Chapel Hill.
Reports To	The position number, position title, PID, and name of the employee's supervisor.
Regular/Temporary	Shows whether the position is Regular or Temporary.

This field:	Defines the following:
Full/Part	Shows whether the position is full-time or part-time.
Empl Class	The type of general employee group this employee belongs to.
Officer Code	Indicates if the employee serves as an officer on a board, and which type of officer.
Regular Shift	This field is not used at UNC-Chapel Hill.
Shift Rate	This field is not used at UNC-Chapel Hill.
Classified Indicator	This field is not used at UNC-Chapel Hill.
Shift Factor	This field is not used at UNC-Chapel Hill.
Duties Type	This field is not used at UNC-Chapel Hill.
Standard Hours	The number of hours an employee is scheduled to work each week.
Work Period	The system usually fills in W for Weekly. This value may be different depending on the employee group, FLSA status and the payroll calendar.
FTE	Measures a worker's involvement in a job or appointment. An FTE of 1.0 means that the person is equivalent to a full-time worker; while an FTE of 0.5 signals that the worker is half-time. The FTE field is calculated by dividing the number of standard hours by the work period hours from the job code.
Adds to FTE Actual Count?	Indicates whether or not the position will count towards the FTE total for the employee.
Encumbrance Override	This field is not used at UNC-Chapel Hill.
Contract Number	This field is not used at UNC-Chapel Hill.
Contract Type	This field is not used at UNC-Chapel Hill.

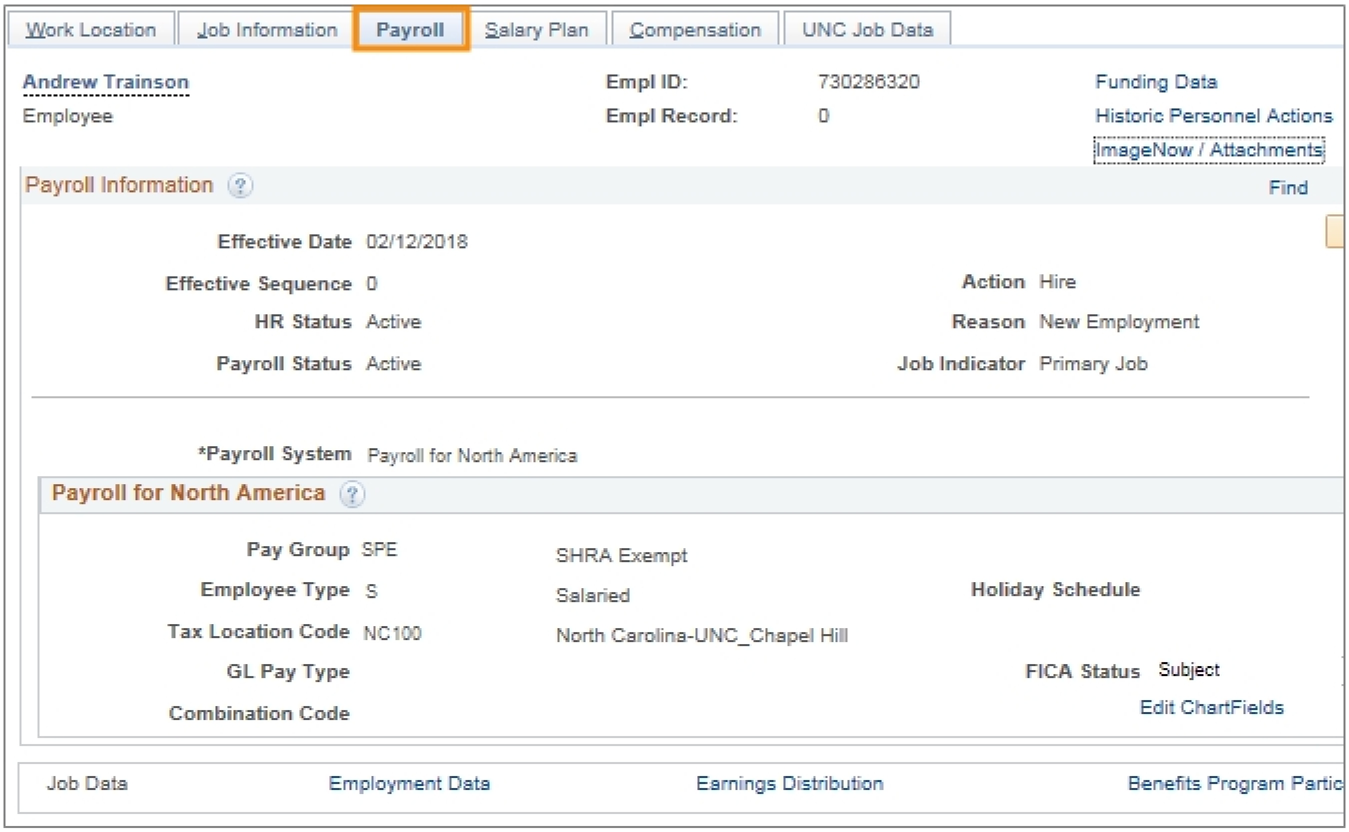


Payroll

On the **Payroll** tab, you can see this information in the fields:

This field:	Defines the following:
Payroll System	The system always fills in this field as Payroll for North America.
Pay Group	The payroll code assigned to the employee.
Employee Type	Identifies the employee as salaried or hourly.
Holiday Schedule	This field is not used at UNC-Chapel Hill.

This field:	Defines the following:
Tax Location Code	The system always fills in this field as NC100.
GL Pay Type	This is not used at UNC-Chapel Hill.
FICA Status	Identifies the employee's tax exemption status, except for Post Doc employees. For Post Doc employees, you can find this information by clicking on the **Earnings Distribution** link.
Combination Code	This is not used at UNC-Chapel Hill.

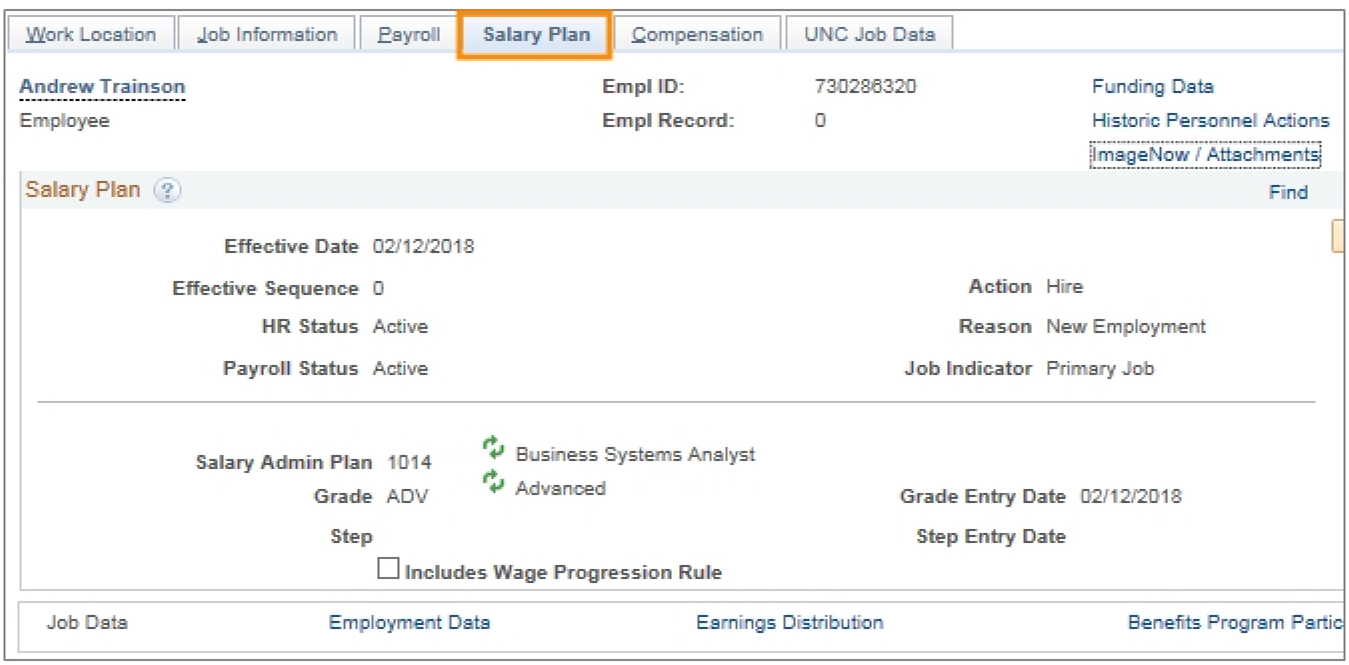


Salary Plan

On the **Salary Plan** tab, you can see this information in the fields:

This field:	Defines the following:
Salary Admin Plan	The salary plan associated with the position's job code.

This field:	Defines the following:
Grade	The pay grade of the salary plan, such as: • Advanced • Contributing • Journey • Temporary **Notes:** • If this value is a number, it's an EPA NF grade . • For some job codes, this field may be blank.
Grade Entry Date	The date on which the employee was first assigned to the pay grade.
Step	This field is not used at UNC-Chapel Hill.
Step Entry Date	This field is not used at UNC-Chapel Hill.
Includes Wage Progression Rule	This field is not used at UNC-Chapel Hill.

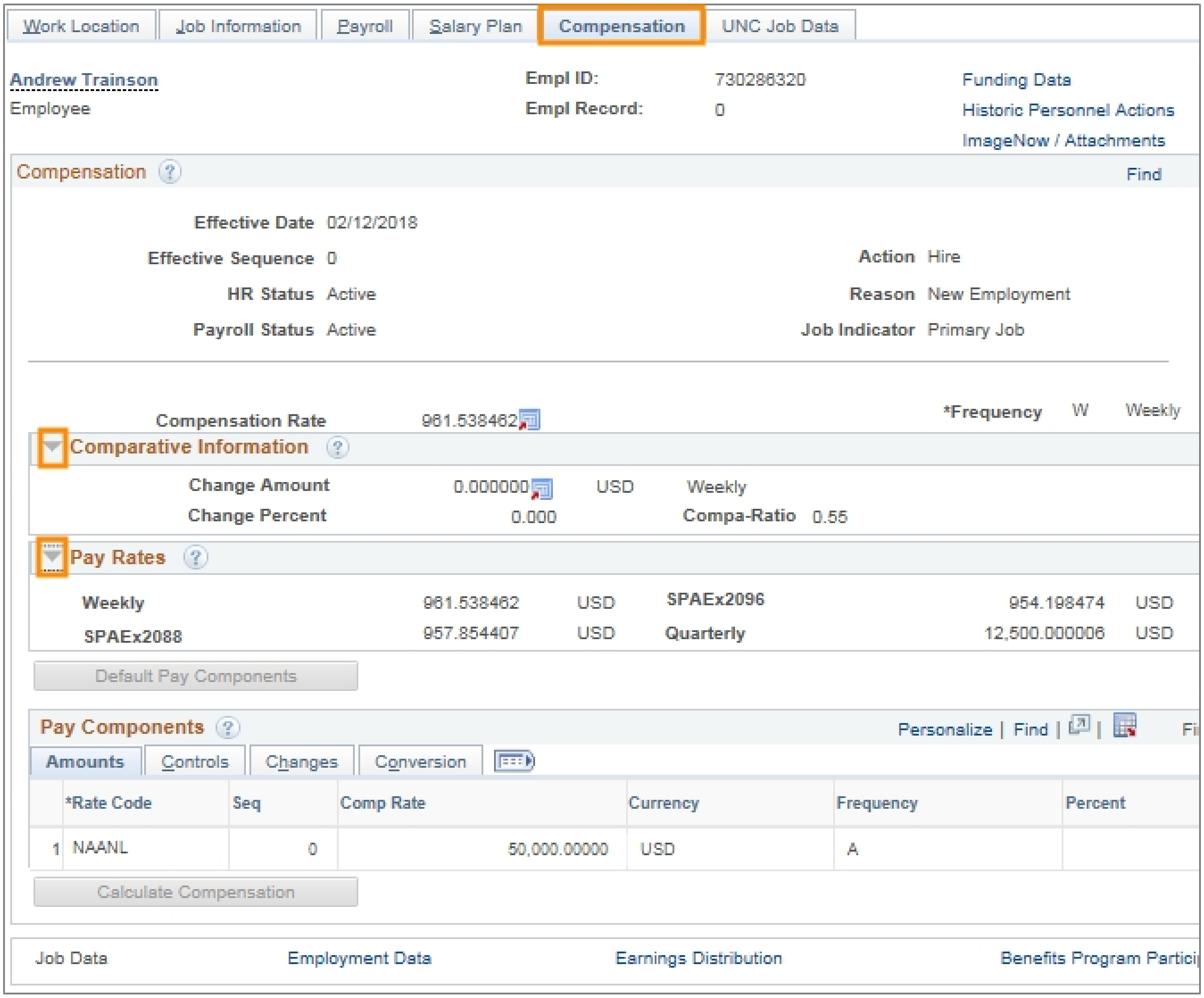


Compensation

On the **Compensation** tab, click the triangles next to **Comparative Information** and **Pay Rates** to see this information in the fields:

This field:	Defines the following:
Compensation Rate	The pay rate based on the compensation frequency.

This field:	Defines the following:
Frequency	The term for which pay is calculated.
Change Amount	A system-generated amount reflecting any changes in compensation rate between the current row and the prior effective dated row.
Change Percent	A system-generated amount reflecting the change in percentages between the current row and the prior effective dated row.
Compa-Ratio	Identifies where the employee's compensation compares to the midpoint of the range and grade. It is calculated by taking Annual FTE Salary and dividing it by the Salary Range Midpoint associated with the grade level of the employee's position.
Pay Rates of Weekly, SPAEx2096, SPAEx2088, and Quarterly	The system-calculated rates based on the comp rate and position's standard hours.
Rate Code	A code for the rate or amount used for compensation.
Comp Rate	The rate of pay.
Currency	The system always fills in this field as USD.
Frequency	The calculated basis of the compensation rate.



UNC Job Data

On the **UNC Job Data** tab, you can see this information in the fields:

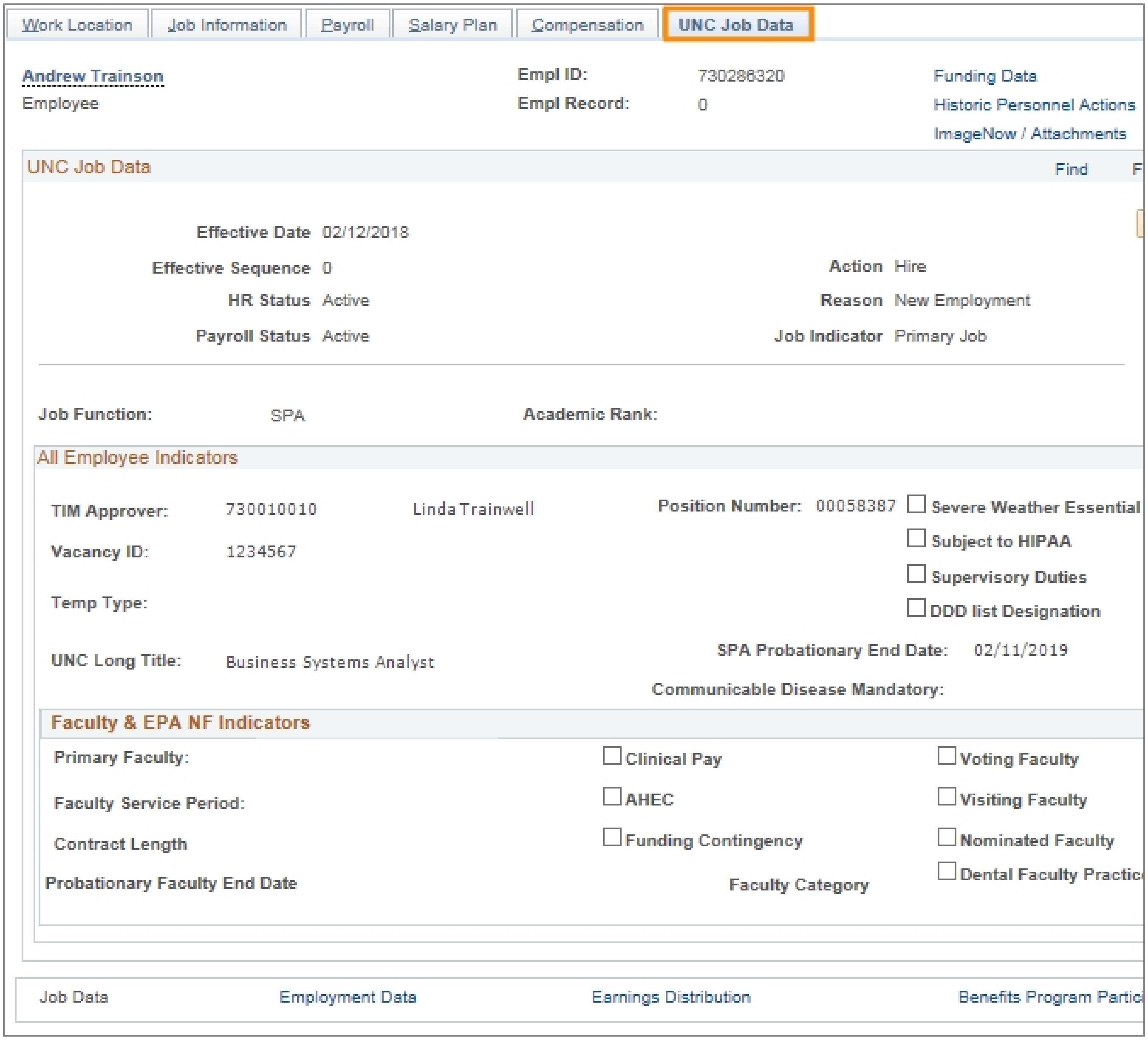
This field:	Defines the following:
TIM Approver	The name of the recipient of the employee's timesheet.
Position	The TIM Approver's position number, if applicable.
Vacancy ID	The recruiting code for the job.
Temp Type	Displays intermittent or regular, if the employee is an SPA temporary.
UNC Long Title	The working job title. **Note:** The UNC Long Title is the job title that appears in the Campus Directory.

This field:	Defines the following:
Severe Weather Essential	Indicates that the employee is a severe weather essential employee. A severe weather essential employee is expected to be at work regardless of severe weather conditions.
Subject to HIPAA	Indicates that the employee is subject to HIPAA rules. All employees with access to others' personal health information are subject to HIPAA rules.
Supervisory Duties	Indicates that the employee supervises others.
DDD list Designation	Indicates that the employee is included in the Deans, Division Heads, and Department Managers campus administrative communications listserv.
SPA Probationary End Date	The date the probationary period ends for SPA employees. This date is one year minus one day from the hire date.
Communicable Disease Mandatory	Indicates one of the following employee designations: • **Primary** - the employee has been designated as a primary health care responder or other essential employee during a communicable disease outbreak. • **Secondary** - the employee has been designated as a backup health care responder or other essential employee during a communicable disease outbreak.

Note: The following fields are applicable only to EPA Faculty employees:

This field:	Defines the following:
Primary Faculty	Identifies if this person is a primary or secondary Faculty member.
Faculty Service Period	Indicates if the faculty member is working for 12 months, nine months, or the summer period.
Contract Length	Indicates the length of the employment contract, if applicable.
Probationary Faculty End Date	The date that the probationary faculty appointment is scheduled to end, if this is a faculty member hired into the tenure track.
Clinical Pay	Indicates that the employee is in a salary plan specific to the School of Medicine clinical departments.
AHEC	Indicates that the employee is a member of the North Carolina Area Health Education Centers (AHEC).
Funding Contingency	Indicates if funding for the position is dependent upon funds other than continuing state budget funds or permanent trust funds.
Faculty Category	Indicates if a faculty member has teaching, research, or public service responbilities, or a combination of all three.

This field:	Defines the following:
Voting Faculty	Indicates if the employee is eligible to vote in campus elections for UNC Faculty Senate representatives.
Visiting Faculty	Indicates if the employee is coming to the University from another institution to work for a short time but will remain on payroll at their home institution, or if the employee is being hired for less than one year.
Nominated Faculty	Indicates if the employee has been recruited for a tenure-track or tenured faculty appointment and hired into a fixed-term faculty position, pending UNC Board of Trustees review/approval of the tenure-track or tenured appointment.
Dental Faculty Practice Plan	Indicates if the employee is participating in the Dental Faculty Practice Plan within the School of Dentistry.

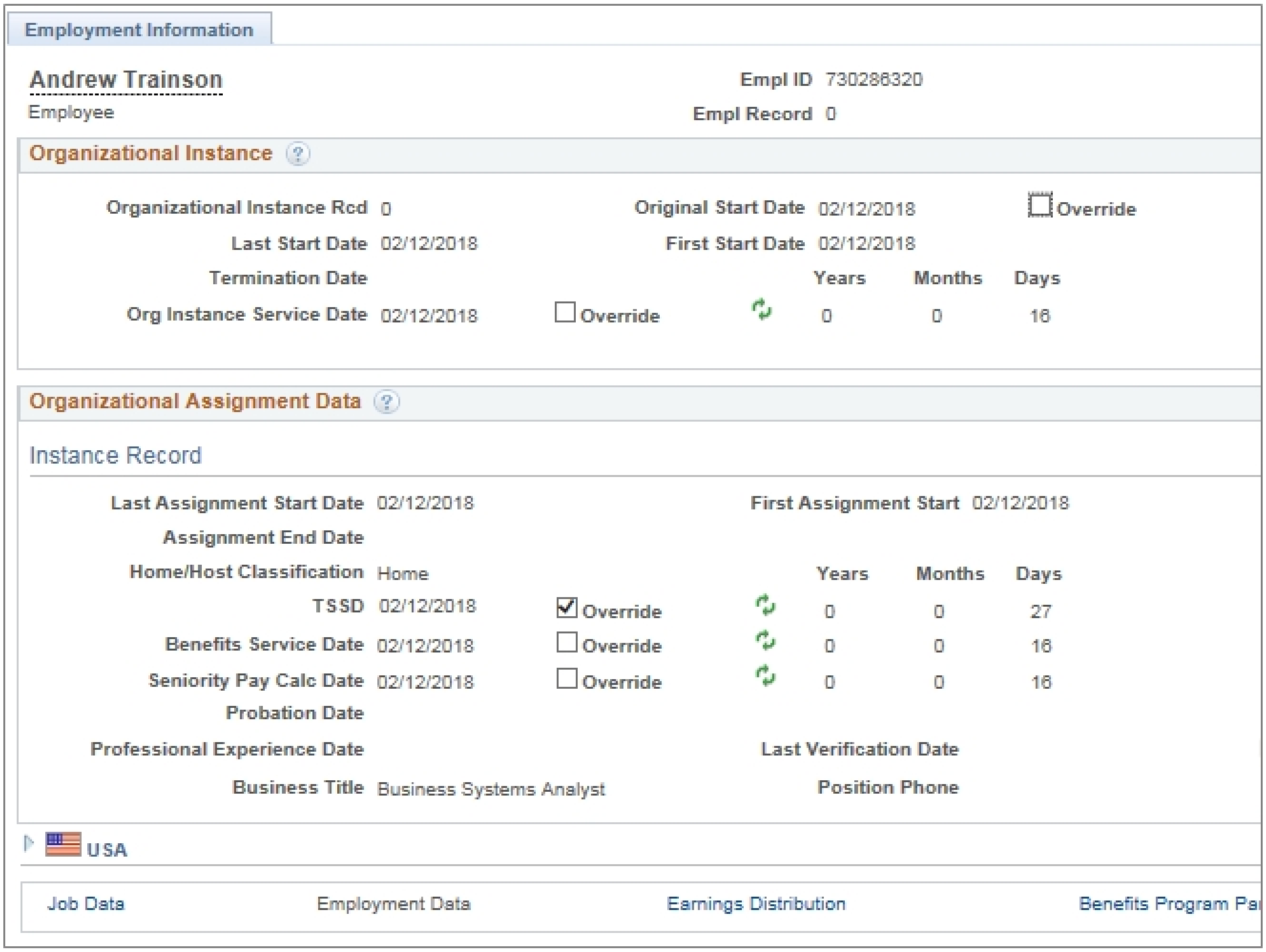


Employment Data

On the **Employment Data** link, you can see this information in the fields:

This field:	Defines the following:
Organizational Instance Rcd	The employee record number.
Original Start Date	The employee’s original hire date.
Last Start Date	The start date of the employee's most recent job without break in service.
First Start Date	The start date of the employee's frst job.

This field:	Defines the following:
Termination Date	The date the employee was terminated, if applicable.
Last Assignment Start Date	This field isn't used at UNC-Chapel Hill.
First Assignment Start	This field isn't used at UNC-Chapel Hill.
Assignment End Date	This field isn't used at UNC-Chapel Hill.
Home/Host Classification	This field isn't used at UNC-Chapel Hill.
TSSD	The employee's total state service start date.
Benefits Service Date	The employee’s benefits start date.
Seniority Pay Calc Date	This field isn't used at UNC-Chapel Hill.
Probation Date	This field isn't used at UNC-Chapel Hill.
Professional Experience Date	This field isn't used at UNC-Chapel Hill.
Last Verification Date	This field isn't used at UNC-Chapel Hill.
Business Title	The job title that corresponds with the job code

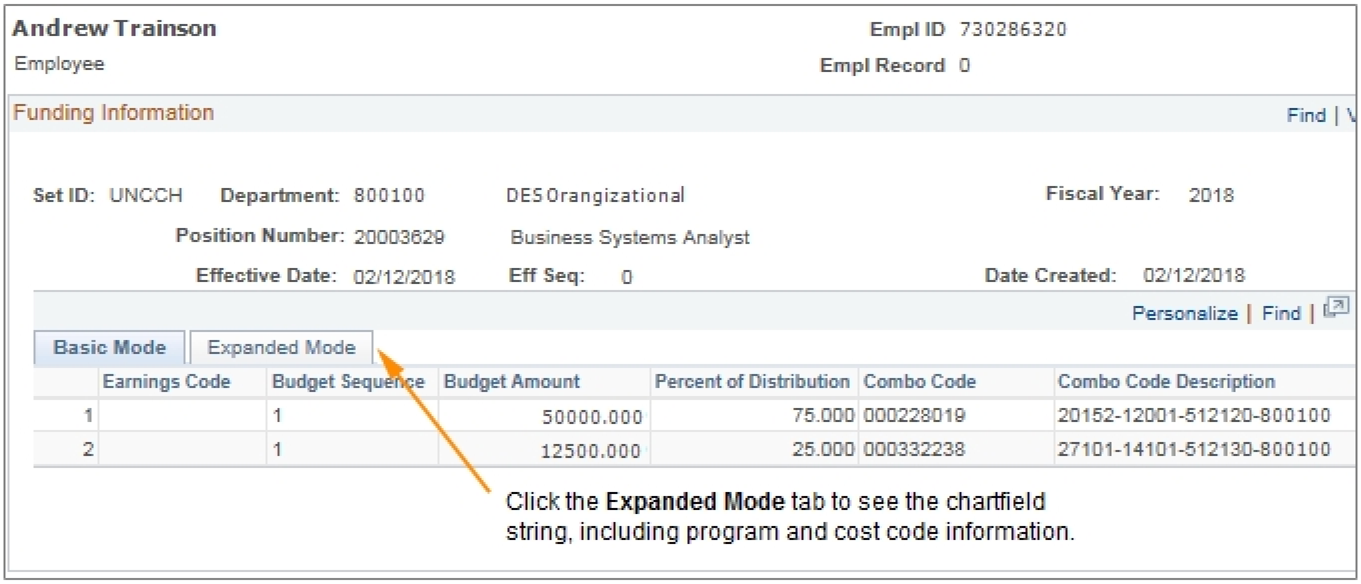


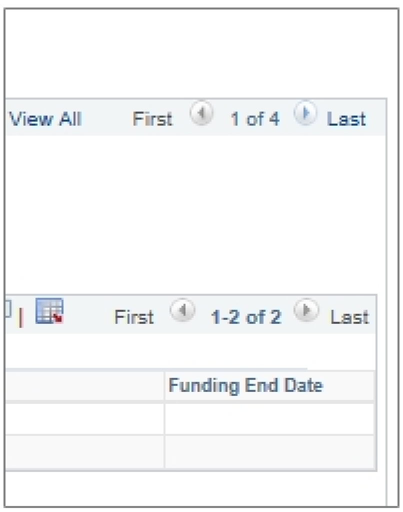
Funding Data

On the Funding Data link, you can see this information in the fields:

This field:	Defines the following:
Earnings Code	This field is always blank.
Budget Sequence	The budget sequence is always 1, regardless of how many rows there are.
Budget Amount	The dollar amount paid to the employee from the source of funding on that row.
Percent of Distribution	The percent of the employee's salary that is paid from the source of funding on that row.
Combo Code	The number used to represent a specific chartfield string.
Combo Code Description	The Fund-Source-Account-Department for all fund types, except OSR and cost chare. For OSR and cost share chartfield strings, combo code descriptions are Fund-Source-Account-Project ID

This field:	Defines the following:
Funding End Date	The last day the employee is scheduled to be paid from the source of funding on that row. Departments use this field at their discretion.





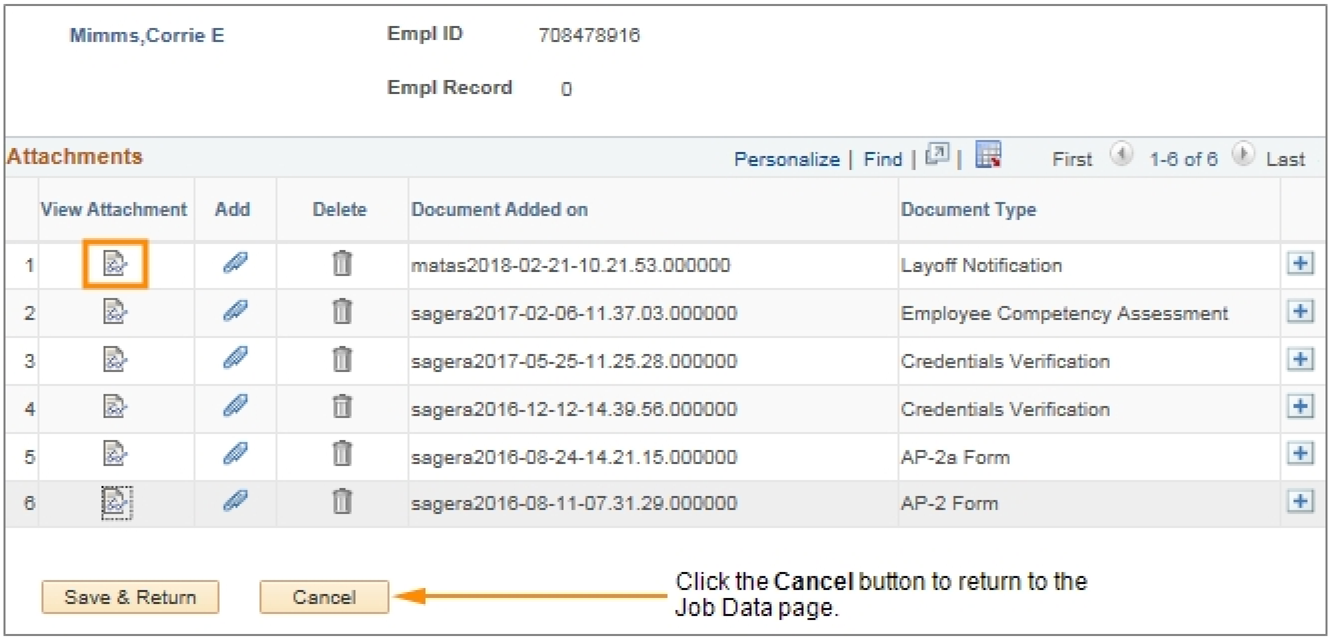
Historic Personnel Actions

The Historic Personnel Actions link takes you to the Historical Action System where you can see information about personnel actions for the employee that were executed before ConnectCarolina went live on October 1, 2014.

Image Now / Attachments

On the Image Now / Attachments link, you can see any attachments that have been uploaded to ePARs for the employee.

Click the **View Attachment** icon to open the attachment.


Mimms,Corrie E
Empl ID 708478916
Empl Record 0
Attachments
Personalize | Find | | First 1-6 of 6 Last
View Attachment
Add
Delete
Document Added on
Document Type
1 matas2018-02-21-10.21.53.000000 Layoff Notification
2 sagera2017-02-06-11.37.03.000000 Employee Competency Assessment
3 sagera2017-05-25-11.25.28.000000 Credentials Verification
4 sagera2016-12-12-14.39.56.000000 Credentials Verification
5 sagera2016-08-24-14.21.15.000000 AP-2a Form
6 sagera2016-08-11-07.31.29.000000 AP-2 Form
Save & Return
Cancel
Click the **Cancel** button to return to the Job Data page.

2 HR Approvals and Workflow

In this chapter, you will learn:

- View ePARs
- Access ePARs using the Worklist
- Approve, recycle, and deny an ePAR

Understanding HR Actions and the Approval Process

Overview

Many tasks you perform throughout the day are part of larger notification, review, and approval process. At UNC-Chapel Hill, the approval process routes information and requests between people and departments across a variety of schools, divisions, and offices. For example, to establish a position, a department initiates a request and describes the job duties, then a consultant in the Office of Human Resources (OHR) reviews it and ensures it is classified properly.

Approvals are specific to the HR action. A request to create a new position may have a different number of required approvals and by different people than a request to change the funding for a position. When an HR action is created, the system routes the action according to the process set up for that action in your department.

> **Important:** Be sure to approve ePARs in line with the various HR and payroll deadlines. Current schedules for bi-monthly and monthly pay periods are posted at https://finance.unc.edu/services/payroll-preparation-and-distribution/.

Approvers Versus Reviewers

In addition to approvers, other employees can be named as reviewers and receive notifications of submitted ePARs. Unlike the approval process for finance transactions, reviewers for HR actions are set up in advance, and not added "on the fly."

Approvers have to take action on the request before it can move to the next level in the approval process. Reviewers are sent a notification that the ePAR has been submitted, the notification contains a link to the form to let them see the details of the HR action. There are no action buttons on the bottom of the form and a reviewer cannot add comments, make changes, or influence its movement in the system in any way.

Options for Approvers

Approvers can choose from the following actions:

- **Approve**: Mark the transaction as approved and move it to the next step in the approvals process.
- **Deny**: Mark the transaction as denied and stop this transaction permanently. The originator needs to generate a completely new action, which starts the approval process over.
- **Recycle**: This pushes the ePAR back to the originator if changes need to be made before the approver can decide to approve or deny the action. Unlike denying an HR action, recycling the ePAR keeps the request active in the system and so that the originator can update the form and resubmit it. Regardless of where in the approval process the action is recycled, the request always goes back to the

originator for changes, and the approval path starts again. Approvers don't make changes to ePARs.

Types of Approvers

Each department can have several types of approvers:

- **HR Representative:** approves actions for all except SPA or EPA students or SPA temporaries
- **Budget Representative**: approves actions for all except SPA students
- **Student Approver:** approves actions only for SPA and EPA students
- **Student Reviewer:** only receives notifications for actions for SPA and EPA students

Note: An originator cannot approve a transaction they are submitting or an action they are the subject of.

Approval Structure

We use up to three levels of approval at UNC-Chapel Hill.

Level 1 and 2 Approval

Level 1 is optional for departments, while Level 2 is required.

The primary department's HR and budget representatives approve ePARs and need to take action. Any secondary department's HR and budget representatives are notified but do not have to take action.

The following table shows the Level 1 approvals and notifications:

For this role...	The approval request goes to:	And notification goes to:	For these ePARS:
HR Rep	Employee's primary department	Employee's secondary department	• Edit Existing Job • Change Employment Status • Add/Update Position • Funding Swap • Lump Sum Payment

For this role...	The approval request goes to:	And notification goes to:	For these ePARS:
Budget Rep	• Employee's primary department • Any department where funding changed	Any department that funds the employee, but that funding did not change	• Edit Existing Job • Change Employment Status • Add/Update Position • Funding Swap • Lump Sum Payment
Student Approver	Student's primary department		• Edit Existing Job • Change Employment Status • Add/Update Position • Funding Swap • Lump Sum Payment
Student Reviewer		Student's primary department	• Edit Existing Job • Change Employment Status • Add/Update Position • Funding Swap • Lump Sum Payment
HR Rep	Primary department and department on form, if incumbent is currently employed at the University Department on form, if incumbent is not currently employed at the University	Employee's secondary department	Hire an Employee
Budget Rep	• Employee's primary department • Any department where funding changed	Any department that funds the employee, but that funding did not change	Hire an Employee
Student Approver	• Department on form • Student's primary department, if applicable		Hire an Employee

For this role...	The approval request goes to:	And notification goes to:	For these ePARS:
Student Reviewer		• Department on form • Student's primary department, if applicable	Hire an Employee
N/A	N/A	N/A	Add or Update an Affiliate

Every department identifies its own Level 2 approvers. After all of the assigned Level 1 reviewers approve an action, the Level 2 approvers receive the same type of approval or notification that the Level 1 department received.

Level 3 Approval

Level 3 approvals and notifications are based on conditional logic that can be triggered by combinations of Employee Group, Action and Reason, Regular or Temporary status, Funding Type, and so on. For example:

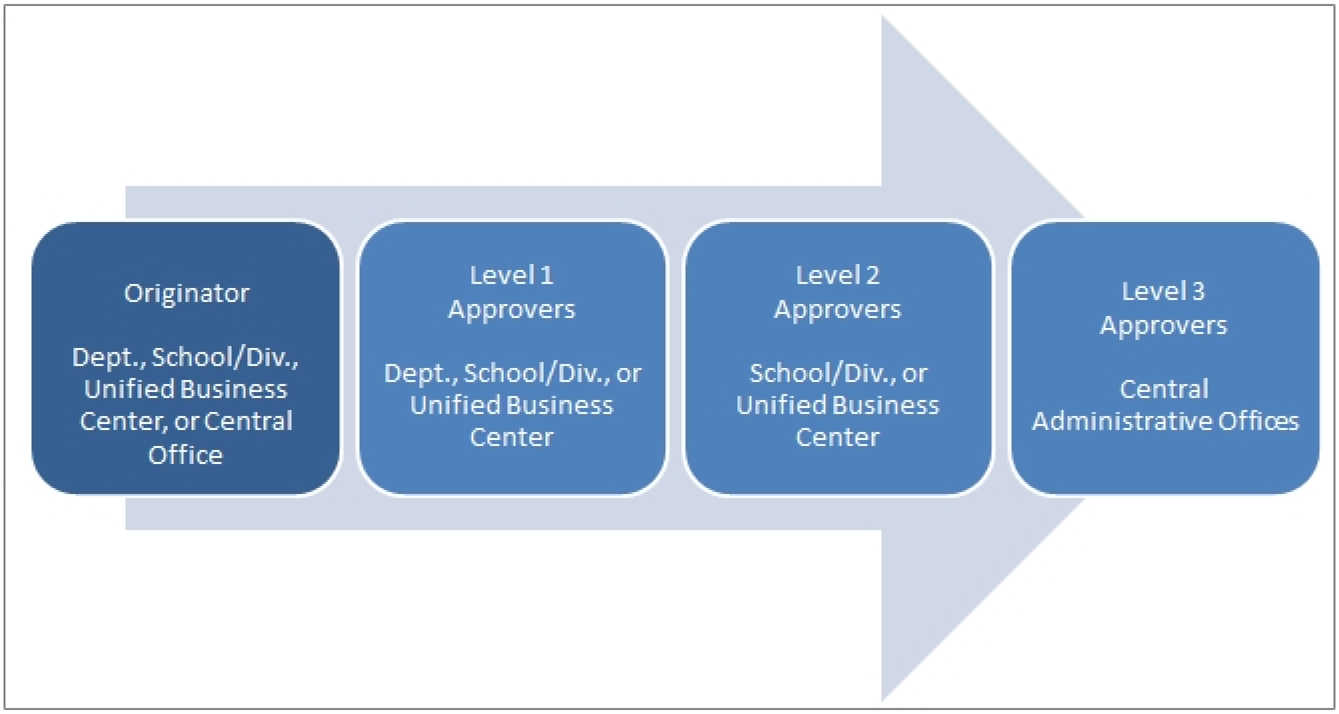
- Academic Personnel approves Faculty and EPA non-faculty actions that HR Reps do not.
- The Budget Office approves actions on state funds, and OSR does not.
- Payroll is notified when a termination is due to death.

Actions are routed to the appropriate central administrative offices for Human Resources and Finance for final approval before the system makes the requested changes.

Approval Routes

We have a consistent path for approvals, but different departments, schools, and divisions enter the path at different places.

- Some departments approve their own actions at Level 1.
- Some departments have a Unified Business Cluster (UBC) that approves requests for them at Level 1.
- Some schools or divisions originate and approve actions for departments at Level 2, making Level 1 unnecessary.
- Departments and schools or divisions all have the option of approving student actions.



Outcome of Approvals

Once the ePAR has been approved at all levels, the requested action is executed, and the system is updated with the information.

The originator of the ePAR is notified that the action has been fully approved.

Viewing ePARs

Overview

Use the links on the ePAR (electronic Personnel Action Request) Home Page to view ePARs you want to approve or review. You can also use the My Worklist link on the portal page to find ePARs (see *Using My Worklist, page 67* for more information). On the ePAR Home Page, these six links allow you to search for ePARs in the system awaiting your attention:

- **Awaiting Approvals Inbox** displays non-Position ePARs awaiting your approval that you, a designated approver, have not looked at yet. If you open an ePAR in your **Awaiting Approvals InBox** but take no action, you can find the ePAR again by clicking on the **Evaluate an ePAR** link.
- **FYI Notifications Inbox** displays read-only views of the non-Position ePARs sent to you, as a reviewer, that you have not looked at yet.
- **Evaluate an ePAR** displays a complete list of non-Position ePARs awaiting your approval, including the ones you have viewed but not taken action on.
- **View an ePAR** displays a read-only view of any non-Position ePARs as well as Position ePARs processed prior to October 8, 2021 that you have the authorization to view in the system. This view includes a transaction/signature log, and allows you to see a complete picture of where the ePAR has been and where it currently is in the approval process.
- ***NEW* - Evaluate a Position ePAR** displays a complete list of position ePARs awaiting your approval, including the ones you have viewed but not taken action on.
- ***NEW* - View a Position ePAR** displays a read-only view of any position ePAR you have the authorization to view in the system. This view includes a transaction/signature log, and allows you to see a complete picture of where the ePAR has been and where it currently is in the approval process.

  Note: For position ePARs submitted before October 11, 2021, use the View an ePAR link.

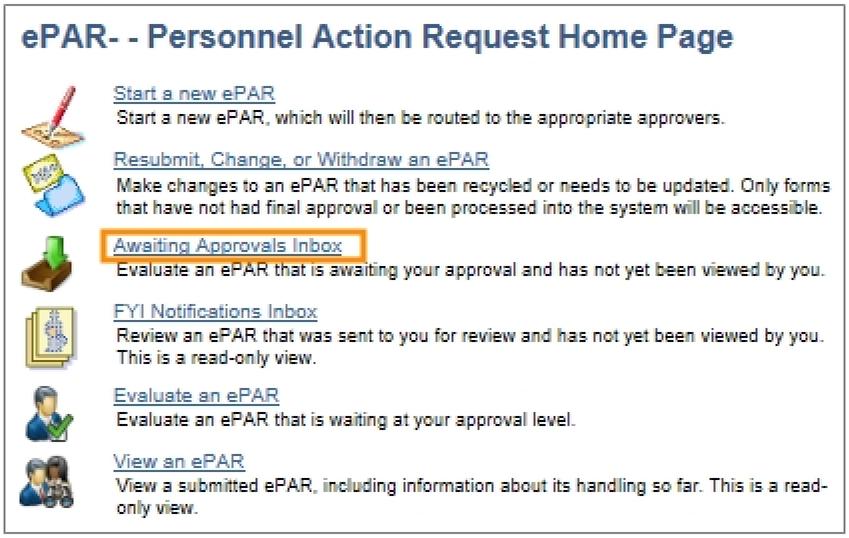
Menu Path

From the Admin WorkCenter home page > **HR WorkCenter > ePAR Home Page**

Viewing ePARs in Your Awaiting Approvals Inbox

Follow these steps to review a new non-Position ePAR that was sent to you because you are a designated approver for this action. These ePARs do not move forward in the approval process until you take action.

1. Click the **Awaiting Approvals Inbox** link.

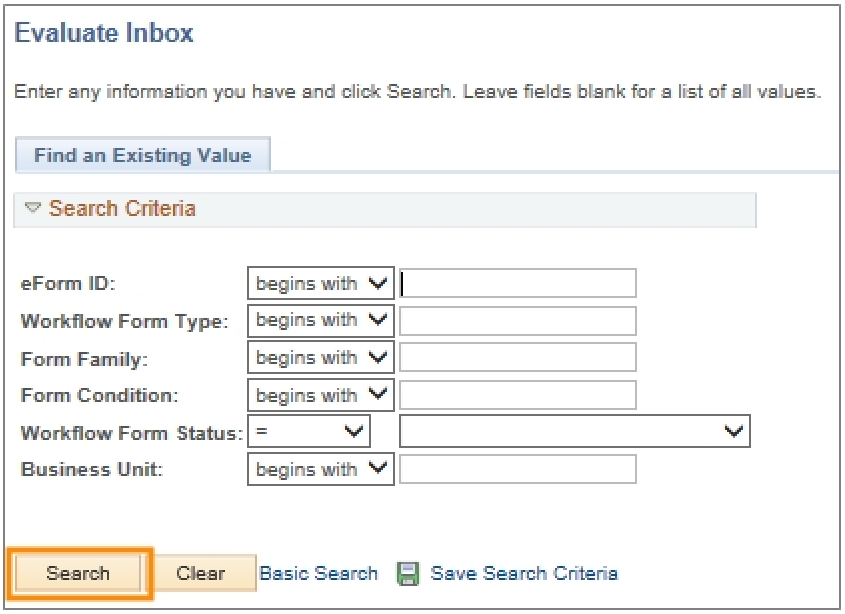


Result: The system displays the Evaluate Inbox page.

2. Complete as many fields as necessary to refine your search or leave all the fields blank to see a complete list of all unviewed ePARs awaiting your approval.

In this field:	**Do the following:**
eForm ID	Enter the unique, numeric identifier assigned to this action.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for an affiliate • **termlvret** for actions to change an employee's status
Form Family	Enter **epaf** (not "epar") for all HR actions.
Form Condition	Leave this field as is.
Workflow Form Status	Leave this field blank.
Business Unit	Enter **uncch** for the University, **uncga** for General Administration, or a foundation business unit.

3. Click the **Search** button.



Result: The system displays all the ePARs that match the criteria you specified.

4. Click the ePAR you want to approve.

   Result: The system displays the ePAR form.

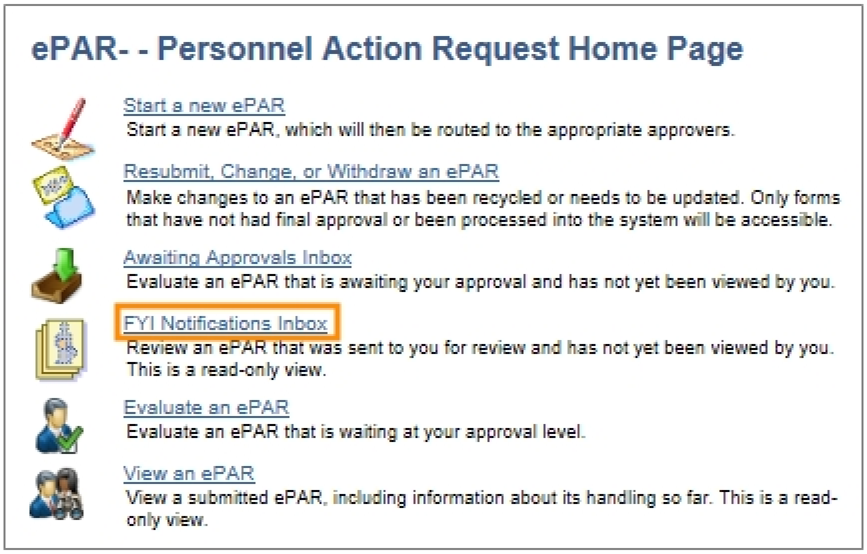
   Once you have opened an ePAR that has been sent to you for approval, it is removed from your **Awaiting Approval Inbox** link. Clicking on this link displays new, un-viewed ePARs only. If you have opened an ePAR but have not taken action on it, find it again by clicking on **Evaluate an ePAR** link.

   Note: For more information about approving ePARs, see *Approving an ePAR, page 1*.

Viewing ePARs in your FYI Notifications Inbox

Follow these steps to see a new non-Position ePAR that was sent to you because you are a designated reviewer for this action. As a reviewer, you do not need to take action, and the ePAR is displayed to you as read-only.

1. Click the **FYI Notifications Inbox** link.

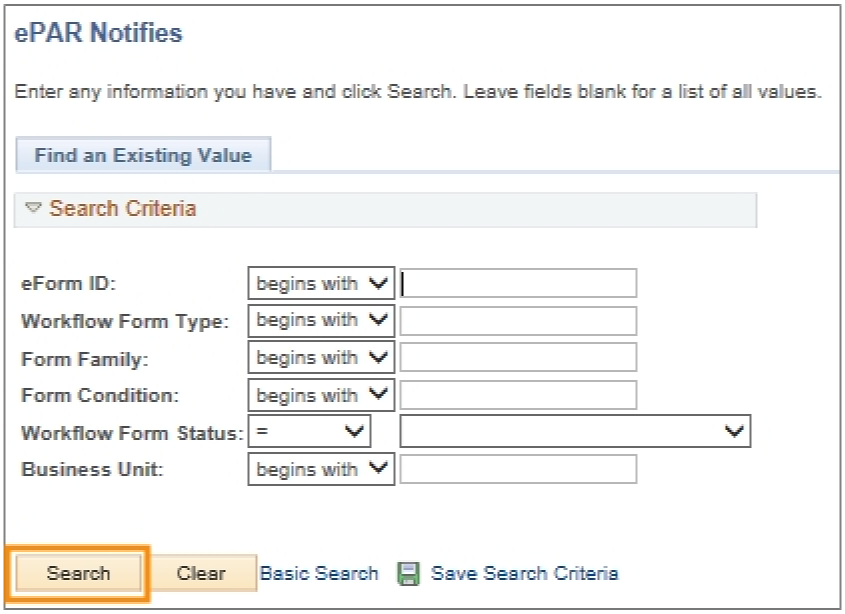


Result: The system displays the ePAR Notifies page.

2. Complete as many fields as necessary to refine your search or leave all the fields blank to see a complete list of all un-viewed ePARs sent to you as a notification.

In this field:	**Do the following:**
eForm ID	Enter the unique, numeric identifier assigned to this action.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for an affiliate • **termlvret** for actions to change an employee's status
Form Family	Enter **epaf** (not "epar") for all HR actions.
Form Condition	Leave this field as is.
Workflow Form Status	Leave this field blank.
Business Unit	Enter **uncch** for the University, **uncga** for General Administration, or a foundation business unit.

3. Click the **Search** button.



Result: The system displays all the ePARs that match the criteria you specified.

4. Click the ePAR you want to view.

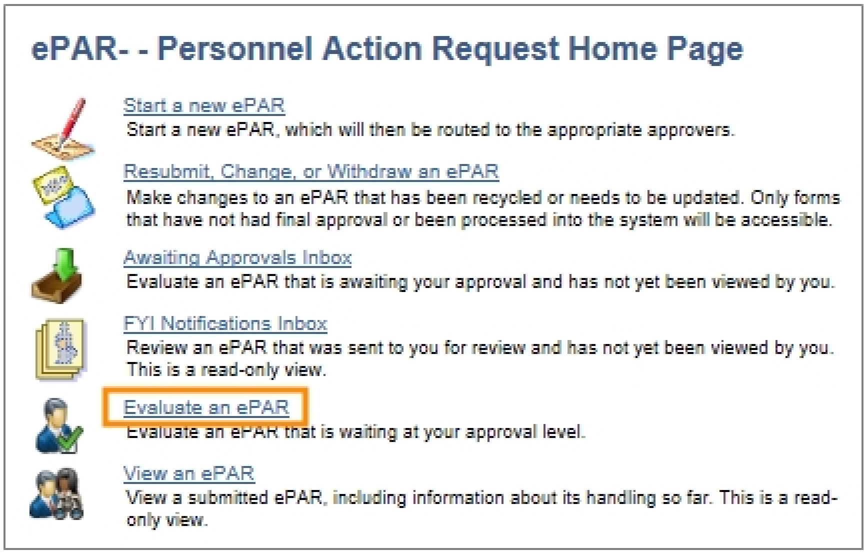
   Result: The system displays a read-only view of the ePAR form. You cannot edit this form in any way.

   Once you have opened an ePAR that has been sent to you for review, it is removed from your **FYI Notifications Inbox** link. Clicking on this link displays new, un-viewed ePARs only. If you have already viewed an ePAR and wish to review it a second time, Click the **View an ePAR** link.

Evaluating an ePAR

Follow these steps to view any non-Postion ePARs in the approval process currently awaiting your approval, even those you have previously looked at but not taken action on. These ePARs are awaiting your approval and will not move forward in the approval process until you take action.

1. Click the **Evaluate an ePAR** link.



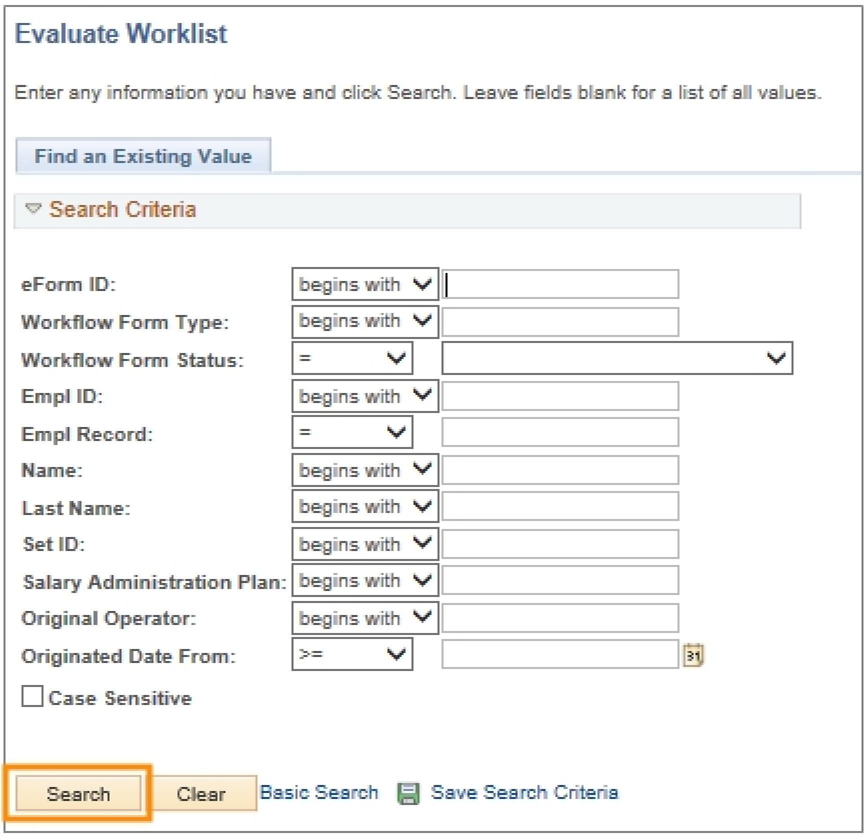
Result: The system displays the Evaluate Worklist page.

2. Complete the fields to refine your search or leave all the fields blank to see a list of all ePARs sent to you and awaiting your action, viewed or un-viewed.

In this field:	**Do the following:**
eForm ID	Enter the unique numeric identifier assigned to this action.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for an affiliate • **termlvret** for actions to change an employee's status
Workflow Form Status	Leave this blank.
Empl ID	Enter the employee's PID.
Empl Record	Enter the employee's job record number.
Name	Enter the first name of the person.
Last Name	Enter the last name of the person.
Set ID	Enter **uncch** for the univerisity, **uncga** for General Administration, or a foundation business unit.

In this field:	Do the following:
Salary Administration Plan	Enter the numeric identifier for this position's assigned salary plan.
Original Operator	Enter the onyen of the HR representative who submitted this ePAR.
Originated Date From	Enter the date this ePAR was submitted.

3. Click the **Search** button.



Result: The system displays all the ePARs that match the criteria you specified.

4. Click the ePAR you want to view.

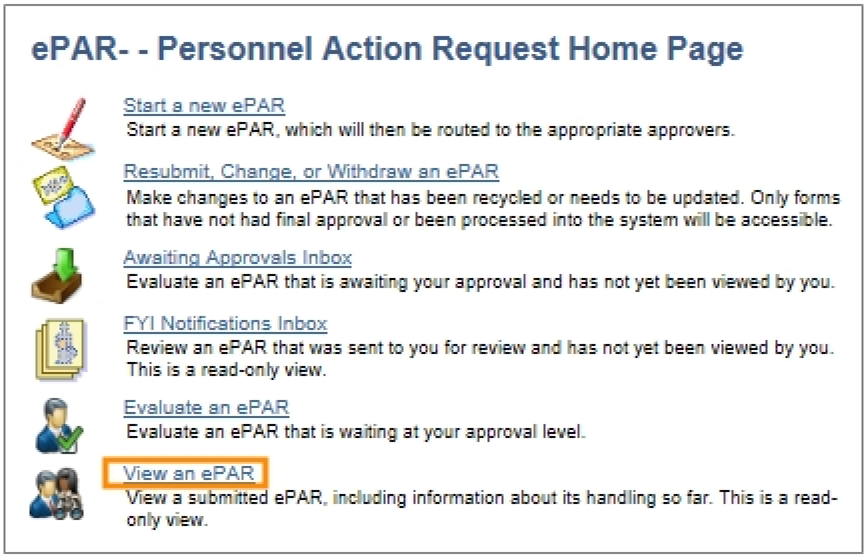
Result: The system displays the ePAR form.

Note: For more information about approving ePARs, see *Approving an ePAR, page 1*.

Viewing an ePAR

Depending on your security level and access to data in the system, you can view any ePAR for your department in a read-only format. These ePARs are displayed along with their approval status. Follow these steps to see a read-only view of a non-Position ePAR form.

1. Click the **View an ePAR** link.



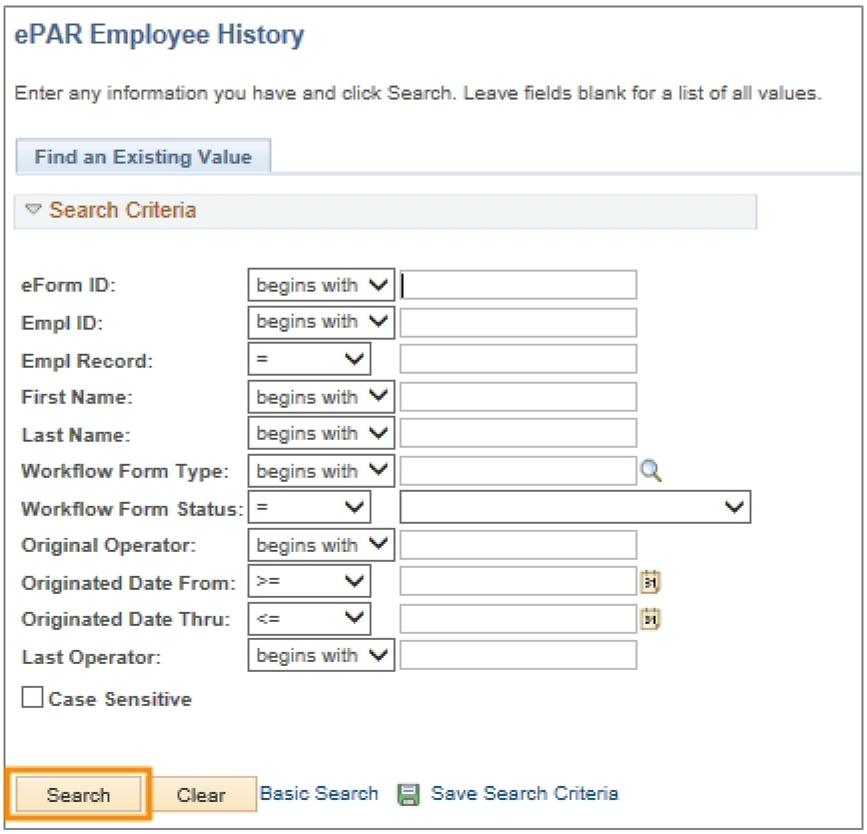
Result: The system displays the ePAR Employee History page.

2. Complete as many fields as necessary to refine your search results or leave all of the fields blank to see search results that include all ePARs that you have permission to view:

In this field:	**Do the following:**
eForm ID	Enter the unique numeric identifier assigned to this action.
Empl ID	Enter the employee's PID.
Empl Record	Enter the employee's record number.
First Name	Enter the first name of the person.
Last Name	Enter the last name of the person.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for an affiliate • **termlvret** for actions to change an employee's status
Workflow Form Status	Leave this field blank.

In this field:	Do the following:
Original Operator	Enter the onyen of employee who originated the ePAR.
Originated Date From	Enter the starting date of the range when the ePAR was originated.
Originated Date Thru	Enter the ending date of the range when the ePAR was originated.
Last Operator	Enter the onyen of the last employee who took action on the ePAR.

3. Click the **Search** button.

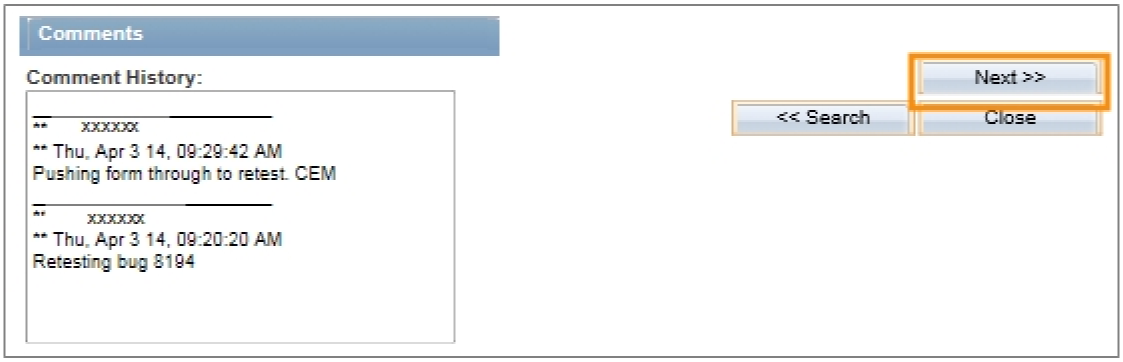


Result: The system displays the ePARs that match the criteria you specified.

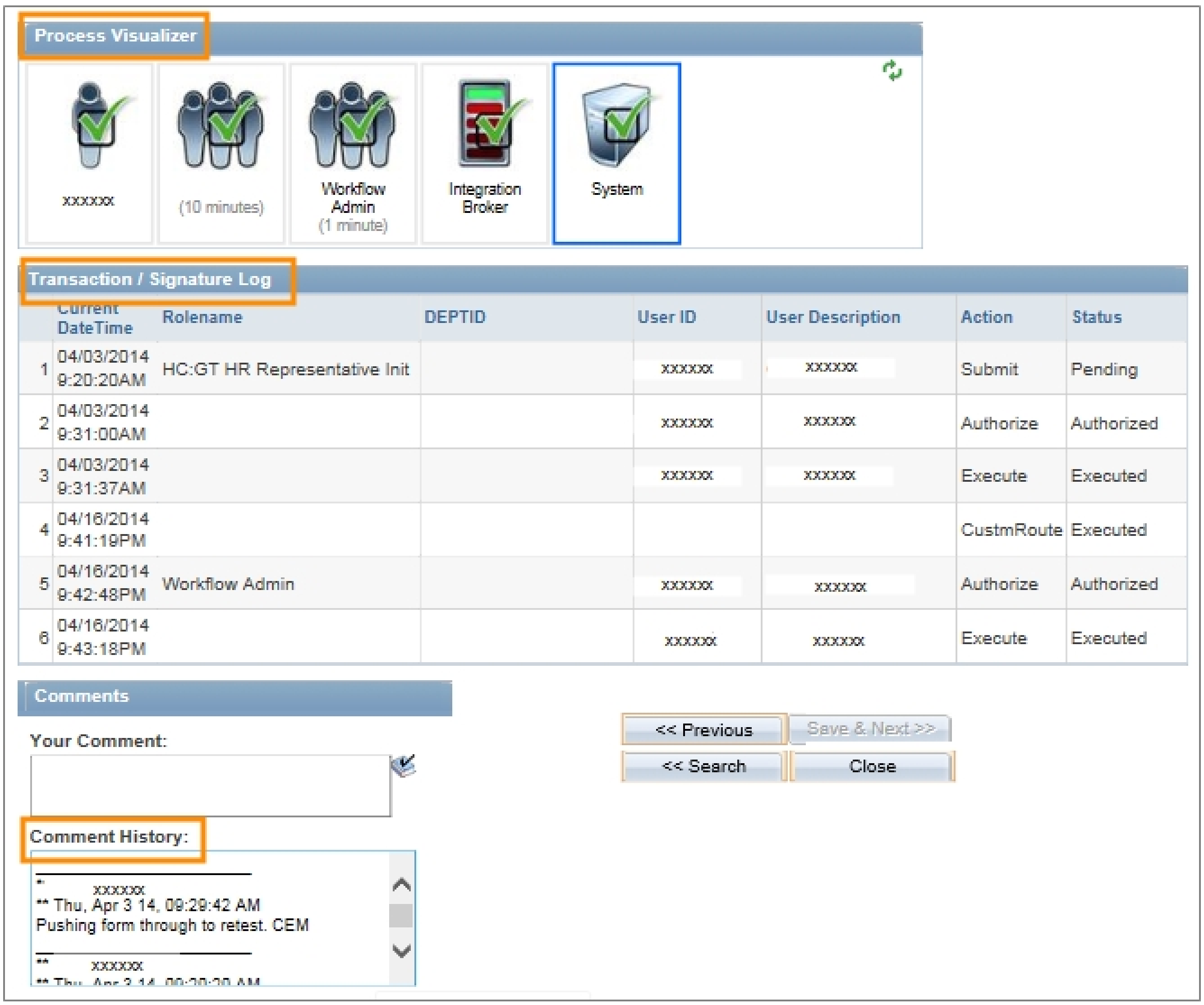
4. Click the ePAR you want to view.

   Result: The system displays a read-only view of the ePAR form.

5. Click the **Next** button at the bottom of the ePAR form to see where the ePAR is in the approval process.



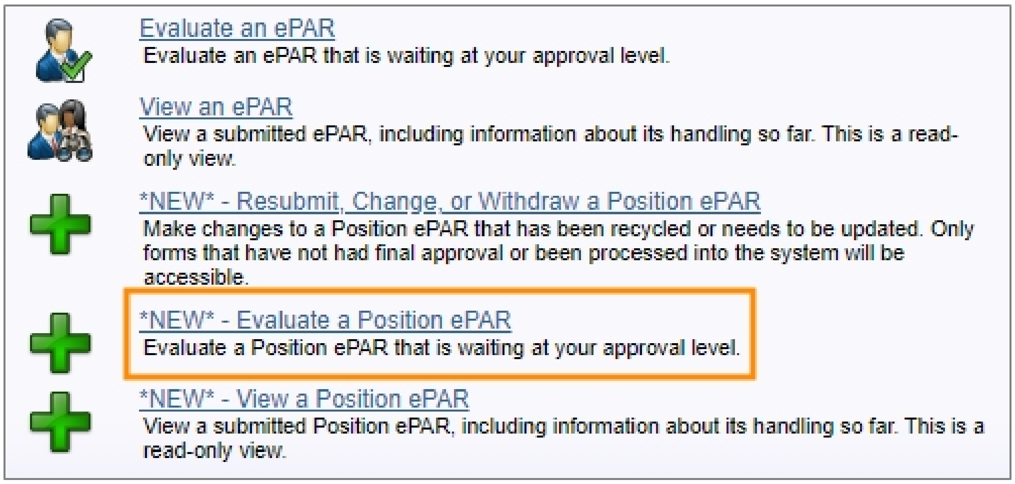
Result: The system displays the Process Visualizer page. This page provides details on which person last approved, denied, or recycled the transaction, as well as the date and time when they made this decision. Anyone who has authorization to view the action can see this information at any time.



Evaluating a Position ePAR

Follow these steps to view a position ePAR in the approval process currently awaiting your approval, even those you have previously looked at but not taken action on. These ePARs are awaiting your approval and will not move forward in the approval process until you take action.

1. Click the ***NEW* Evaluate a Position ePAR** link.

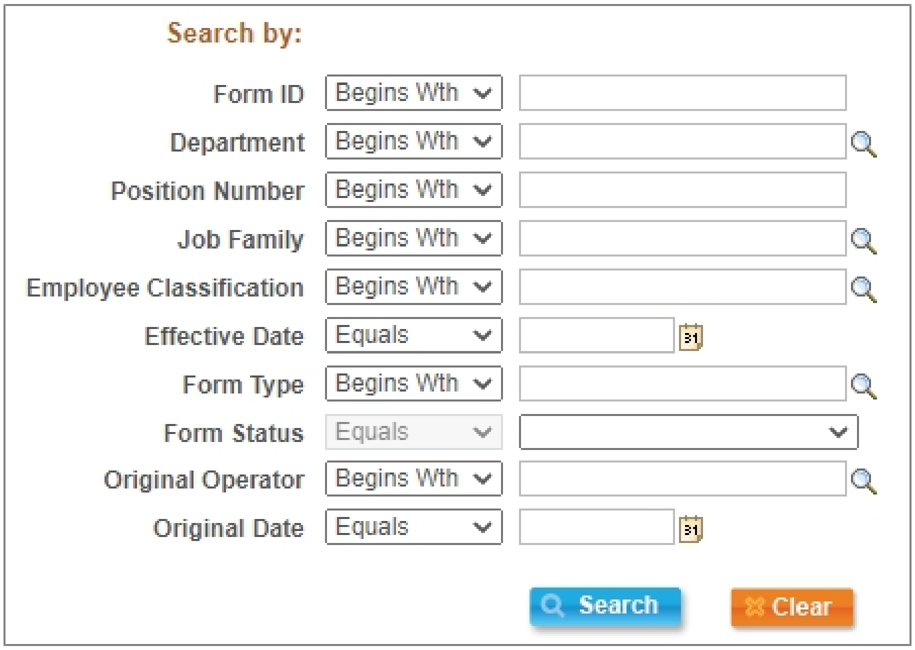


Result: The system displays the ePAR search form.

2. Complete the fields to refine your search or leave all the fields blank to see a list of all ePARs sent to you and awaiting your action, viewed or un-viewed.

In this field:	**Do the following:**
Form ID	Enter the ePAR number.
Department	Enter the department number the position is associated with.
Position Number	Enter the position number associated with the ePAR.
Job Family	Enter EPA (EHRA) or SPA (SHRA).
Employee Classification	Choose the appropriate employee classification from the list.
Effective Date	Enter the effective date of the ePAR.
Form Type	You can leeave this field blank. The only choice is Position.
Form Status	Leave this field blank.
Original Operator	Enter the onyen of the HR representative who submitted this ePAR.
Original Date	Enter the date this ePAR was submitted.

3. Click the **Search** button.



Result: The system displays all the ePARs that match the criteria you specified.

4. Click the ePAR you want to view.

Result: The system displays the ePAR form.

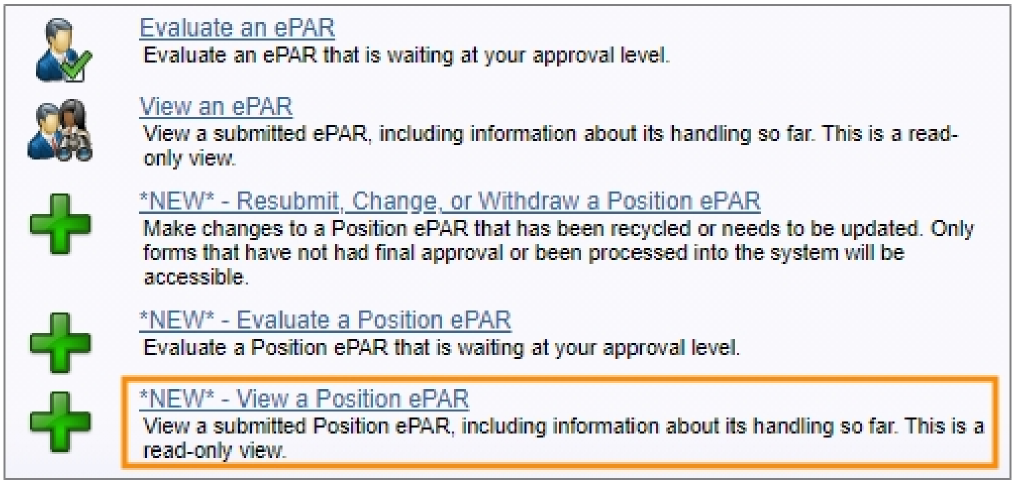
Note: For more information about approving ePARs, see *Approving an ePAR, page 1*.

Viewing a Position ePAR

Depending on your security level and access to data in the system, you can view any ePAR for your department in a read-only format. These ePARs are displayed along with their approval status. Follow these steps to see a read-only view of a Position ePAR form.

Note: For position ePARs submitted before October 11, 2021, use the Viewing an ePAR link instead of the Viewing a Position ePAR link.

1. Click the ***NEW* View a Position ePAR** link.

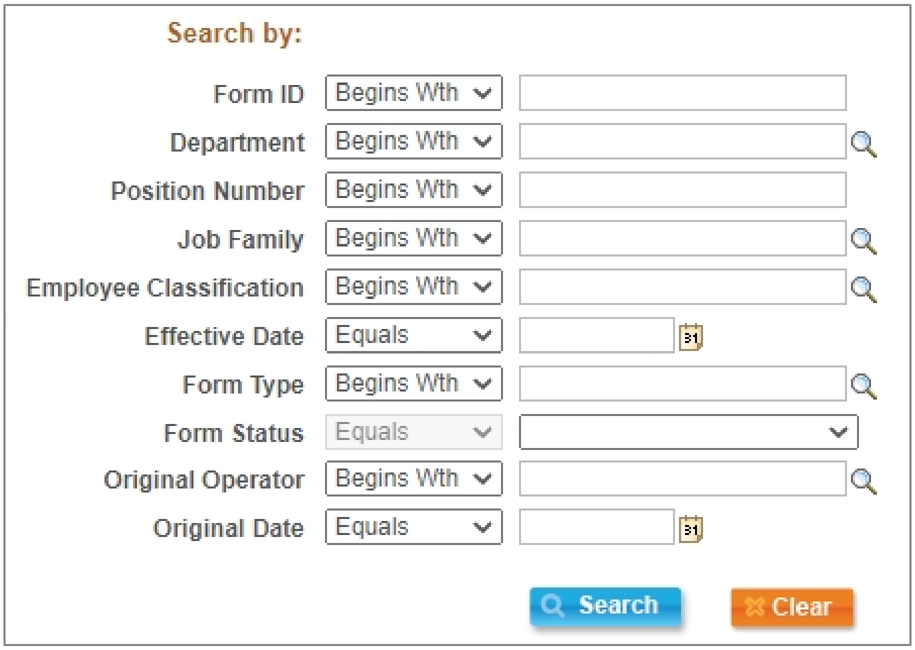


Result: The system displays the ePAR search form.

2. Complete as many fields as necessary to refine your search results or leave all of the fields blank to see search results that include all ePARs that you have permission to view:

In this field:	Do the following:
Form ID	Enter the ePAR number.
Department	Enter the department number the position is associated with.
Position Number	Enter the position number associated with the ePAR.
Job Family	Enter EPA (EHRA) or SPA (SHRA).
Employee Classification	Choose the appropriate employee classification from the list.
Effective Date	Enter the effective date of the ePAR.
Form Type	You can leeave this field blank. The only choice is Position.
Form Status	Leave this field blank.
Original Operator	Enter the onyen of the HR representative who submitted this ePAR.
Original Date	Enter the date this ePAR was submitted.

3. Click the **Search** button.



Result: The system displays the ePARs that match the criteria you specified.

4. Click the ePAR you want to view.

   Result: The system displays a read-only view of the ePAR form.

5. Click the **Next** button at the bottom of the ePAR form to see where the ePAR is in the approval process.

   Result: The system displays the Process Visualizer page. This page provides details on which person last approved, denied, or recycled the transaction, as well as the date and time when they made this decision. Anyone who has authorization to view the action can see this information at any time.

Using My Worklist

Overview

The My Worklist list is located on a tile in the Admin Workcenter and is the most direct access to actions and transactions awaiting your attention. Here you'll find both Human Resource (HR) and Finance actions and notifications sent to you for your review or approval.

Important: Approve ePARs in line with the various HR and payroll deadlines.

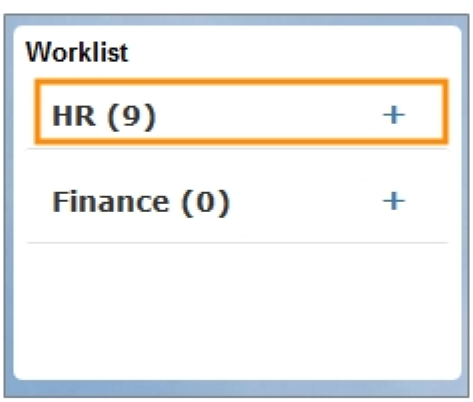
Related Resources

- For more information on the approval process, see *Understanding HR Actions and the Approval Process, page 48.*
- For more information on actions you can take on ePARs in the approval process, see:
  - *Viewing ePARs, page 53*
  - *Approving an ePAR, page 1*
  - *Denying an ePAR, page 1*
  - *Recycling an ePAR, page 1*

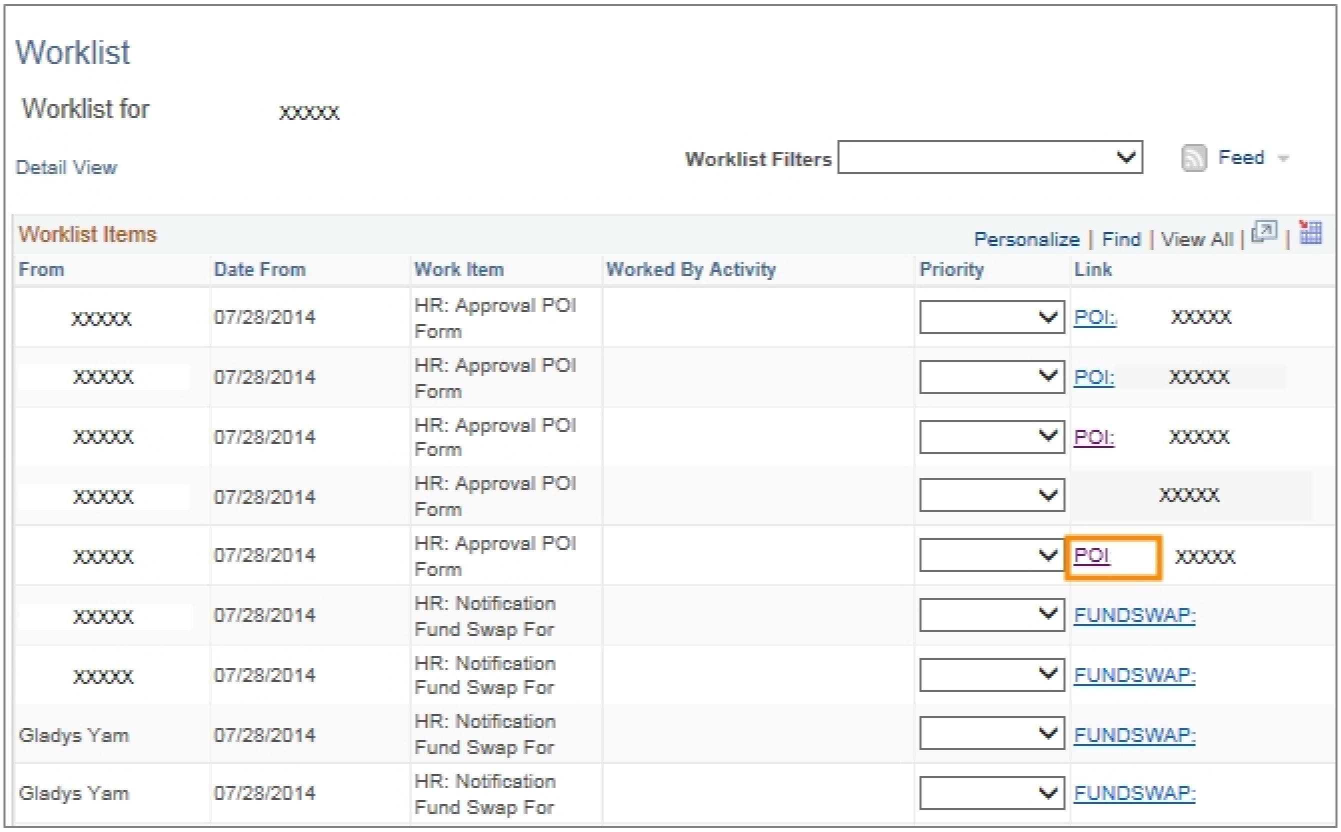
Steps - Using My Worklist

After logging into ConnectCarolina, notice the My Worklist tile on the Admin WorkCenter home page. This tile displays the number of notifications and approvals waiting for your review and action

1. To view a combined summary of all of the HR and Finance items that need your action or review, click **HR** on your Worklist tile.

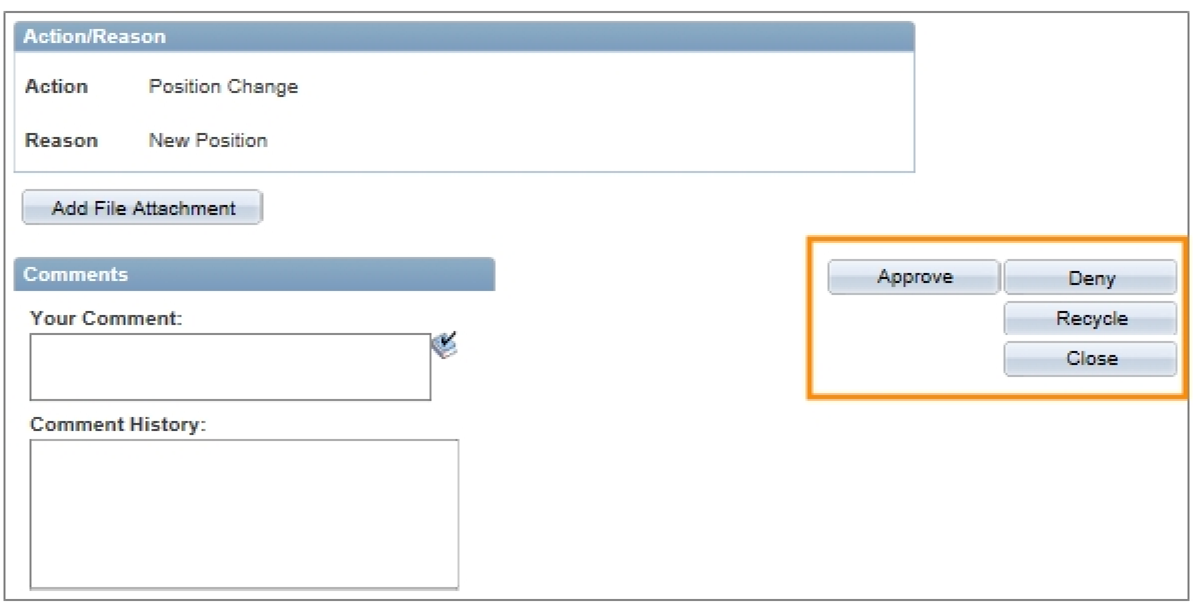


2. Click the link for the ePAR you want to view or approve.



Result: The system displays the ePAR.

3. Review the information, then scroll to the bottom of the ePAR to take any necessary action.



Evaluating ePARs

Overview

For approvers, there are key items to review when deciding to approve, deny, or recycle a submitted ePAR. The following page lists key items to look for on these ePARs:

- Add/Update Position
- Lump Sum Payment
- Hire an Employee

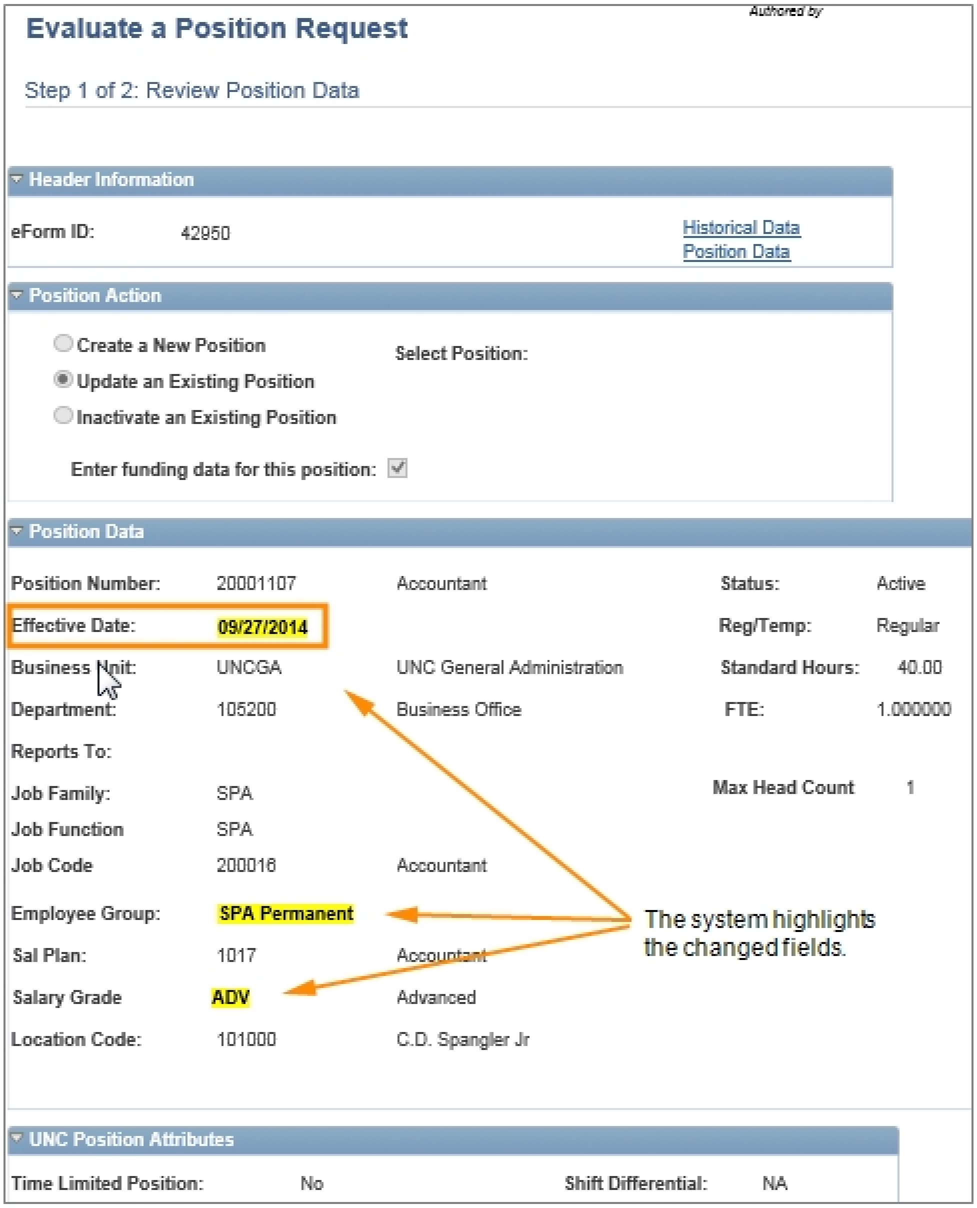
Menu Path

Admin Work Center home page, choose **HR WorkCenter > ePAR Home Page**

What to Look for on an Add/Update Position ePAR

1. In the Position Data section, review the following:

On this area of the ePAR:	**Check the following:**
Effective Date	Make sure the effective date is accurate. If this ePAR is updating a position that has an incumbent, make sure the effective date doesn't fall between the effective dates on the person's job record. **Note:** Only one position ePAR form per position number can be submitted on an effective date.
Anything highlighted in yellow	For any field that the system highlights in yellow, check to make sure the information is accurate.

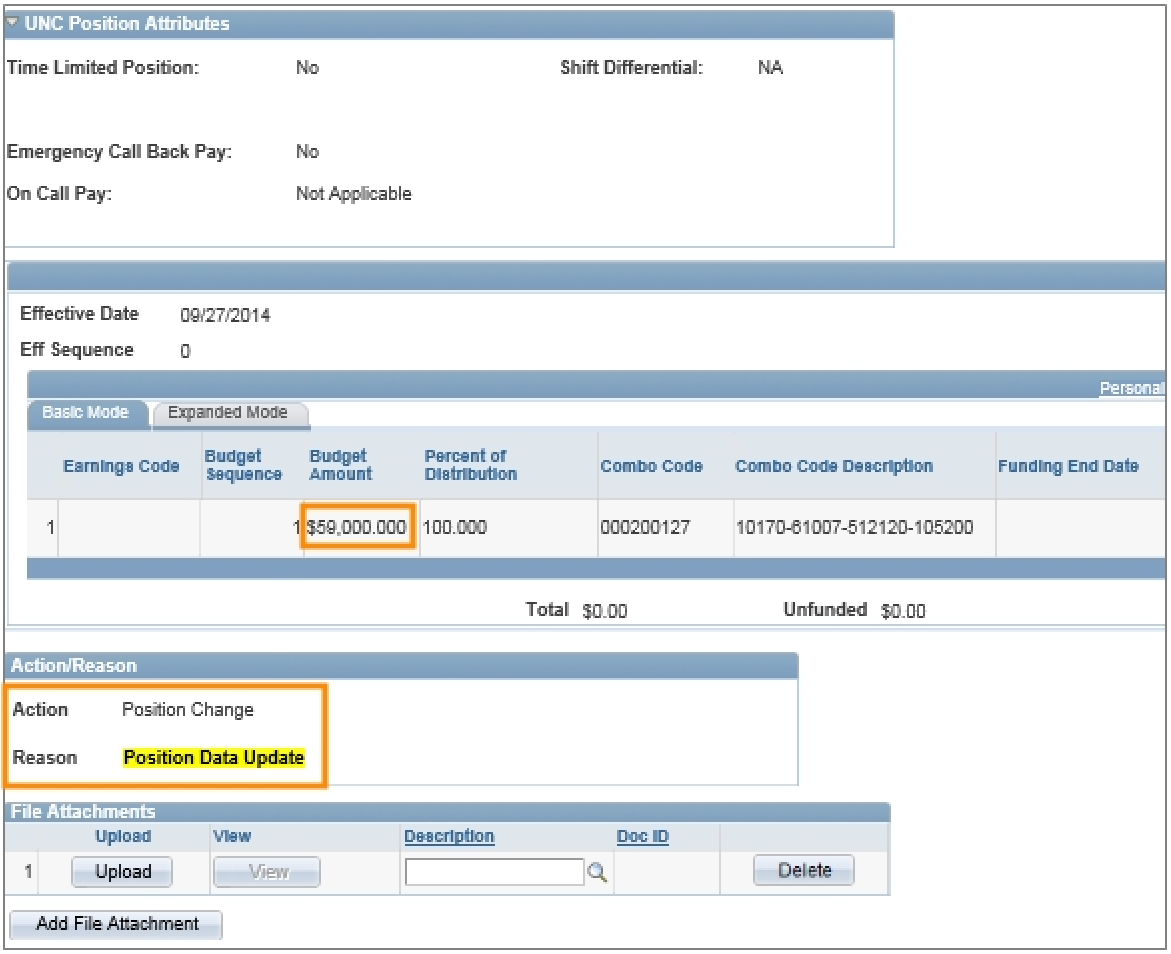


2. On the funding grid, verify the budget amount.

   Note: If the update for the position impacts the incumbent's compensation, the originator needs to submit another job change after the position change is approved and completed in the system.

3. In the Action/Reason section, verify that the Action and Reason codes are correct and support each other.

4. In the File Attachments section, make sure any attachments are valid and support the description code entered by the originator.



5. Review the Budget Check Status to make sure the ePAR has passed budget check, if the budget amount was changed on the ePAR.

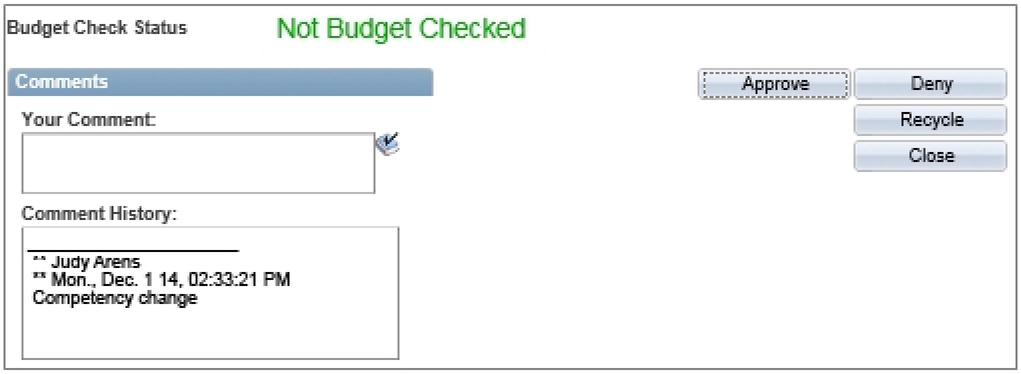
6. Read the information entered by the originator in the Comment History field.

7. In the Your Comment field, enter your initials and any additional comments you have about the approval action.

   Note: Any comments you add to this form are permanently attached to the form and cannot be changed or deleted at any time.

   Caution! Be sure to protect social security numbers, credit card information, and other sensitive information. Be careful not to type them in the Your Comment, Description, or other free form text fields. Read the University's Information Security policy for more information.

8. Click the **Approve**, **Deny**, or **Recycle** button, depending on the action you choose.



Result: The Process Visualizer shows you where the ePAR goes next in the approvals process, depending on the action you chose.

What to Look for on a Lump Sum Payment ePAR

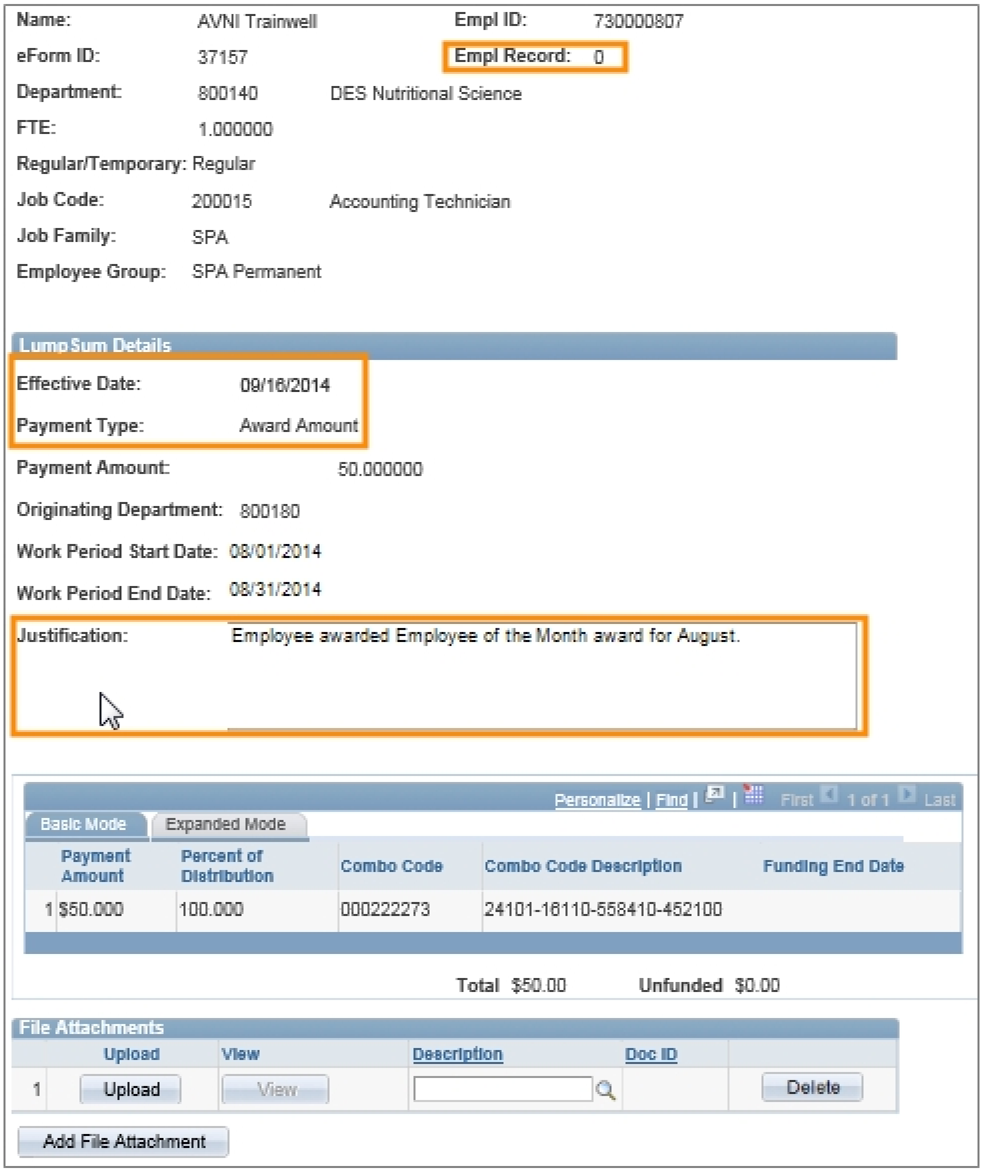
1. Check the Empl Record to make sure this ePAR is for the employee's primary job.

   Note: A lump sum payment can only be made against a primary job, unless it is for clinical pay or a summer school lump sum payment.

2. In the Lump Sum Details section, review the following:

For this field:	Check the following:
Effective Date	Make sure the effective date is accurate. Verify that the effective date aligns with anticipated work period start and end dates, if applicable.
Payment Type	Verify that the originator chose the correct payment type.
Justification	Make sure your school or department's policies regarding lump sum payment information are followed.

3. In the File Attachments section, make sure any attachments are valid and support the description code entered by the originator.



Name: AVNI Trainwell Empl ID: 730000807
eForm ID: 37157 Empl Record: 0
Department: 800140 DES Nutritional Science
FTE: 1.000000
Regular/Temporary: Regular
Job Code: 200015 Accounting Technician
Job Family: SPA
Employee Group: SPA Permanent

Lump Sum Details
Effective Date: 09/16/2014
Payment Type: Award Amount
Payment Amount: 50.000000
Originating Department: 800180
Work Period Start Date: 08/01/2014
Work Period End Date: 08/31/2014
Justification: Employee awarded Employee of the Month award for August.

Personalize | Find | First 1 of 1 Last

Basic Mode | Expanded Mode

	Payment Amount	Percent of Distribution	Combo Code	Combo Code Description	Funding End Date
1	$50.000	100.000	000222273	24101-16110-558410-452100	

Total $50.00 Unfunded $0.00

File Attachments

	Upload	View	Description	Doc ID	
1	Upload	View			Delete

Add File Attachment

4. Review the Budget Check Status to make sure the ePAR has passed budget check.

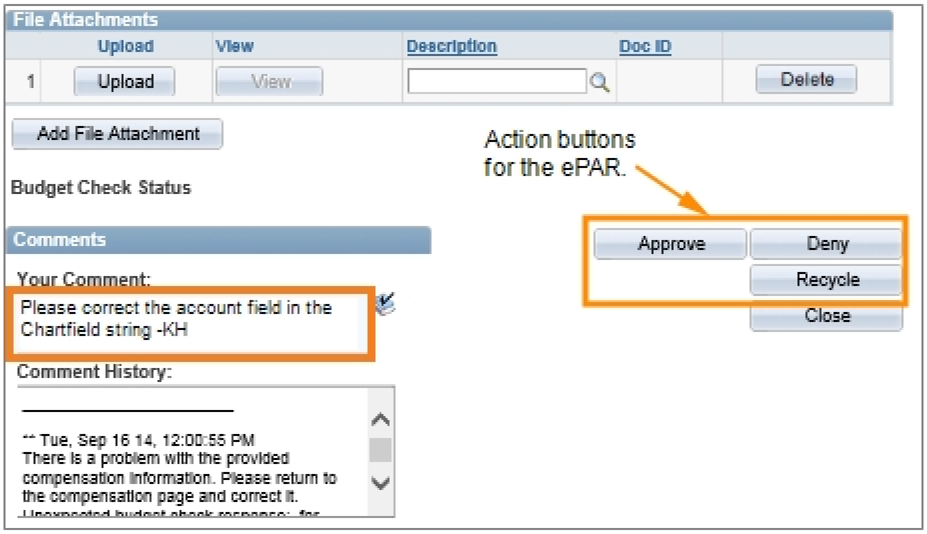
5. Read the information entered by the originator in the Comment History field.

6. In the Your Comment field, type your initials and any comments you have about the approval action.

Note: Any comments you add to this form are permanently attached to the form and cannot be edited or deleted at any time.

Caution! Be sure to protect social security numbers, credit card information, and other sensitive information. Be careful not to type them in the Your Comment, Description, or other free form text fields. Read the University's Information Security policy for more information.

7. Click the **Approve**, **Deny**, or **Recycle** button, depending on the action you choose.



Result: The Process Visualizer shows you where the ePAR goes next in the approvals process, depending on the action you chose.

What to Look for on a Hire ePAR

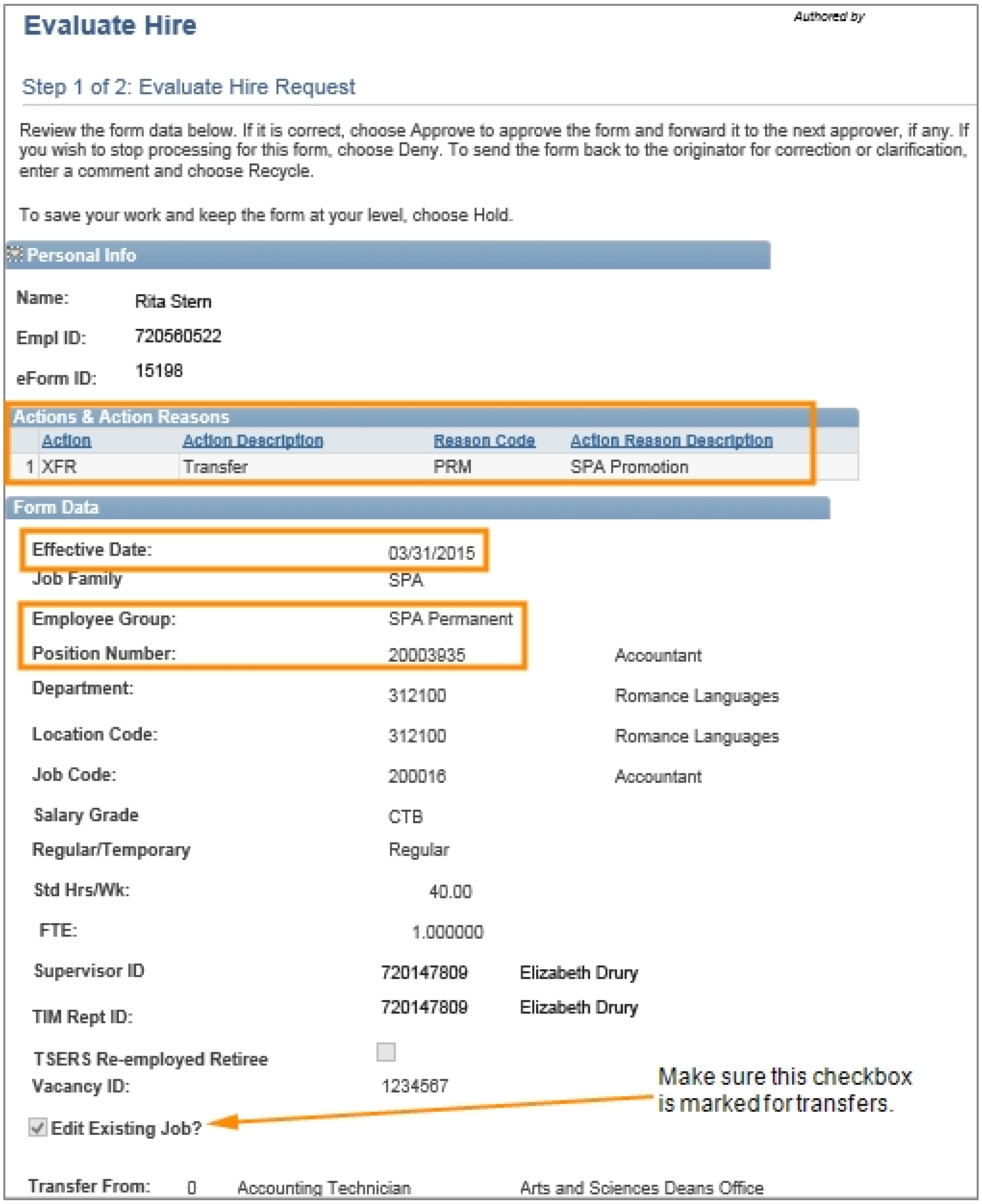
1. In the Actions & Action Reasons section, check the Action and Reason Code for accuracy and to identify if this is a hire, rehire, or transfer.

2. In the Form Data section, review the following:

Note: The system may or may not display some of the fields, depending on the employee group.

For this field:	Check the following:
Effective Date	Make sure the effective date aligns with University onboarding policies.
Employee Group	Make sure the employee group is correct.
Position Number	If this person is being hired into a position, make sure the position number is correct.
Expected Job End Date	If this is for an EPA or SPA Temporary employee group, make sure this date is first day that the person is not on payroll. For example, if the last day the person is expected to work is March 24, then the Expected End Date is March 25.

For this field:	Check the following:
Edit Existing Job	Make sure checkbox is marked if this is a transfer (or it will be secondary job)
SPA Probationary End Date	If applicable, verify the probationary period's end date. The system fills in this date as two years minus one day from the hire date. The system displays this field for SPA permanent employees only.
Tenure Date	For faculty, make sure this date aligns with tenure policy. The system displays this field for EPA Faculty only.
Annual Rate	If the employee is salaried, verify the dollar amount paid to the employee each year. **Note:** The system calculates the employee's 1.0 FTE equivalent salary if the FTE is less than 1.0 and displays it next to the Annual Rate field.
Flat Rate	If the employee is paid a flat rate,verify the monthly flat rate amount.



Authored by

Evaluate Hire

Step 1 of 2: Evaluate Hire Request

Review the form data below. If it is correct, choose Approve to approve the form and forward it to the next approver, if any. If you wish to stop processing for this form, choose Deny. To send the form back to the originator for correction or clarification, enter a comment and choose Recycle.

To save your work and keep the form at your level, choose Hold.

Personal Info

Name: Rita Stern

Empl ID: 720560522

eForm ID: 15198

Actions & Action Reasons

	Action	Action Description	Reason Code	Action Reason Description
1	XFR	Transfer	PRM	SPA Promotion

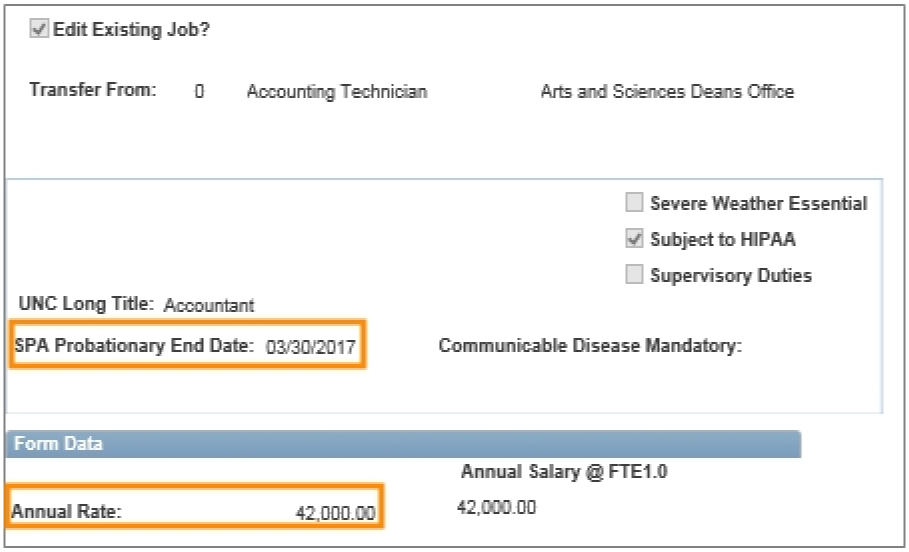
Form Data

Effective Date:	03/31/2015	
Job Family	SPA	
Employee Group:	SPA Permanent	
Position Number:	20003935	Accountant
Department:	312100	Romance Languages
Location Code:	312100	Romance Languages
Job Code:	200016	Accountant
Salary Grade	CTB	
Regular/Temporary	Regular	
Std Hrs/Wk:	40.00	
FTE:	1.000000	
Supervisor ID	720147809	Elizabeth Drury
TIM Rept ID:	720147809	Elizabeth Drury
TSERS Re-employed Retiree		
Vacancy ID:	1234567	

Edit Existing Job?

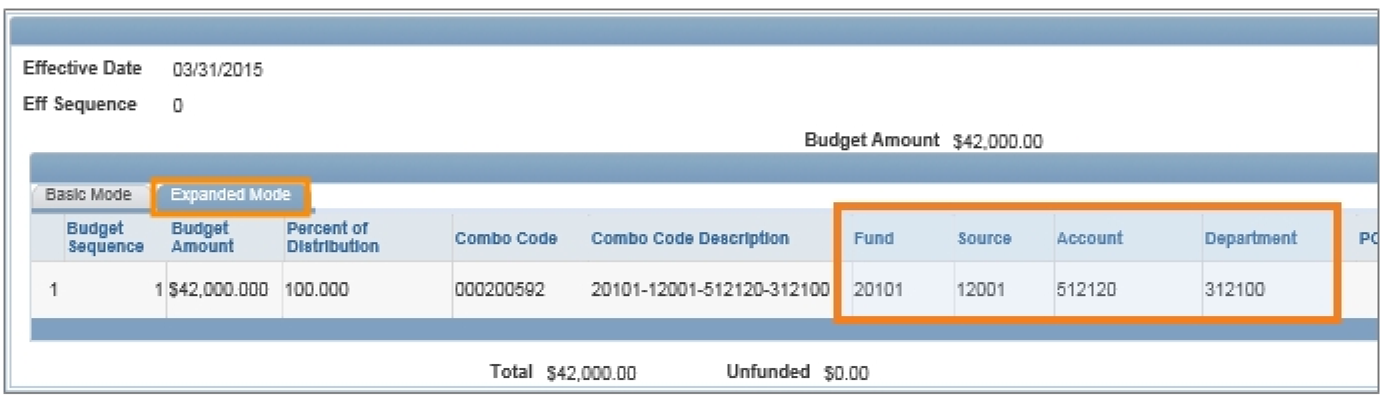
Make sure this checkbox is marked for transfers.

Transfer From: 0 Accounting Technician Arts and Sciences Deans Office



3. In the funding grid, click the **Expanded Mode** tab to verify that the chartfields for funding are correct.

4. If the Funding End Date is completed, make sure it is accurate.



5. In the File Attachments section, make sure any attachments are valid and support the description code entered by the originator.

6. Review the Budget Check Status to make sure the ePAR has passed budget check.

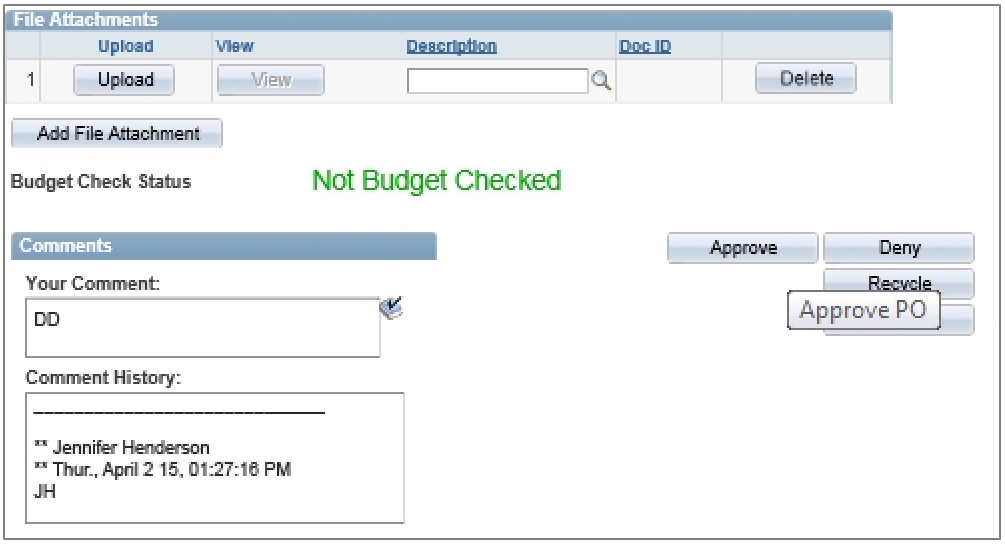
7. Read the information entered by the originator in the Comment History field.

8. In the Your Comment field, type your initials and any comments you have about the approval action.

Note: Any comments you add to this form are permanently attached to the form and cannot be edited or deleted at any time.

Caution! Be sure to protect social security numbers, credit card information, and other sensitive information. Be careful not to type them in the Your Comment, Description, or other free form text fields. Read the University's Information Security policy for more information.

9. Click the **Approve**, **Deny**, or **Recycle** button, depending on the action you choose.



Result: The Process Visualizer shows you where the ePAR goes next in the approvals process, depending on the action you chose.

Entering an Approve, Deny or Recycle Decision for an ePAR

Overview

Depending on the structure of your unit, school, office or department, HR actions are entered by an originator then flow to an approver who can evaluate the ePAR. Approvers can choose from the following actions:

- **Approve**: Sends the ePAR to the next step in the workflow.
- **Recycle**: Sends the ePAR back to the originator. Allows the originator to make changes to the ePAR and resubmit it.
- **Deny**: Stops this ePAR permanently. The originator needs to generate a completely new action, and start the approval process over. Only use in extreme cases.

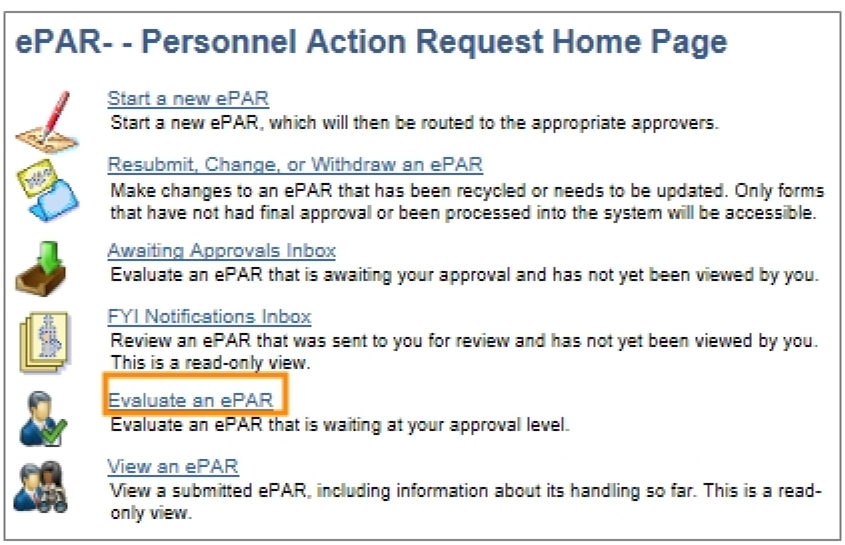
For a broader context, see *Understanding HR Actions and the Approval Process, page 48*

Steps - Evaluating an ePAR

Follow these steps to evaluate an ePAR that is not for a position. If you need to review a Position ePAR, refer to *Entering an Approve, Deny or Recycle Decision for a Position ePAR, page 84*

1. **Admin WorkCenter** > **HR WorkCenter > ePAR Home Page**

2. Click the **Evaluate an ePAR** link.



Result: The system displays the Evaluate Worklist page.

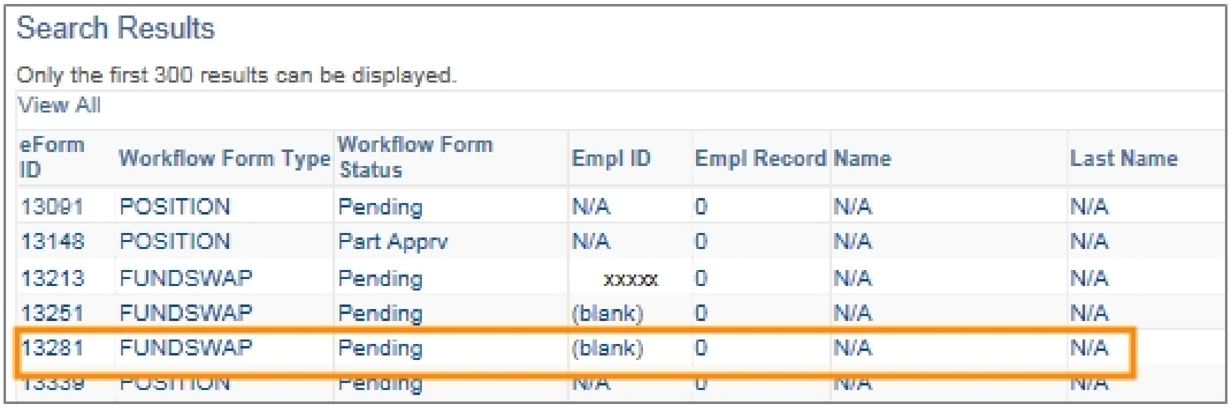
3. Complete the fields to refine your search results, or leave all the fields blank to see all ePARs sent to you and awaiting your action.

In this field:	Do the following:
eForm ID	Enter the unique numeric identifier assigned to this action.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for a person of interest • **position** for actions to create or update a position • **termlvret** for actions to change an employee's status
Workflow Form Status	Leave this field blank.
Empl ID	Enter the employee's PID.
Empl Record	Enter the employee's job record number.
Name	Enter the first name of the person.
Last Name	Enter the last name of the person.
Set ID	Enter **uncch** for the University, **uncga** for General Administration, or a foundation business unit.
Salary Administration Plan	Enter the numeric identifier for this position's assigned salary plan.
Original Operator	Enter the name of the HR representative who submitted this ePAR.
Originated Date From	Enter the date this ePAR was submitted.

4. Click the **Search** button

   Result: The system displays the ePARs that match the criteria you specified.

5. Click the ePAR you want to evaluate.



Search Results

Only the first 300 results can be displayed.

View All

eForm ID	Workflow Form Type	Workflow Form Status	Empl ID	Empl Record	Name	Last Name
13091	POSITION	Pending	N/A	0	N/A	N/A
13148	POSITION	Part Apprv	N/A	0	N/A	N/A
13213	FUNDSWAP	Pending	xxxxx	0	N/A	N/A
13251	FUNDSWAP	Pending	(blank)	0	N/A	N/A
13281	FUNDSWAP	Pending	(blank)	0	N/A	N/A
13339	POSITION	Pending	N/A	0	N/A	N/A

Result: The system displays the ePAR form with buttons to allow you to take action.

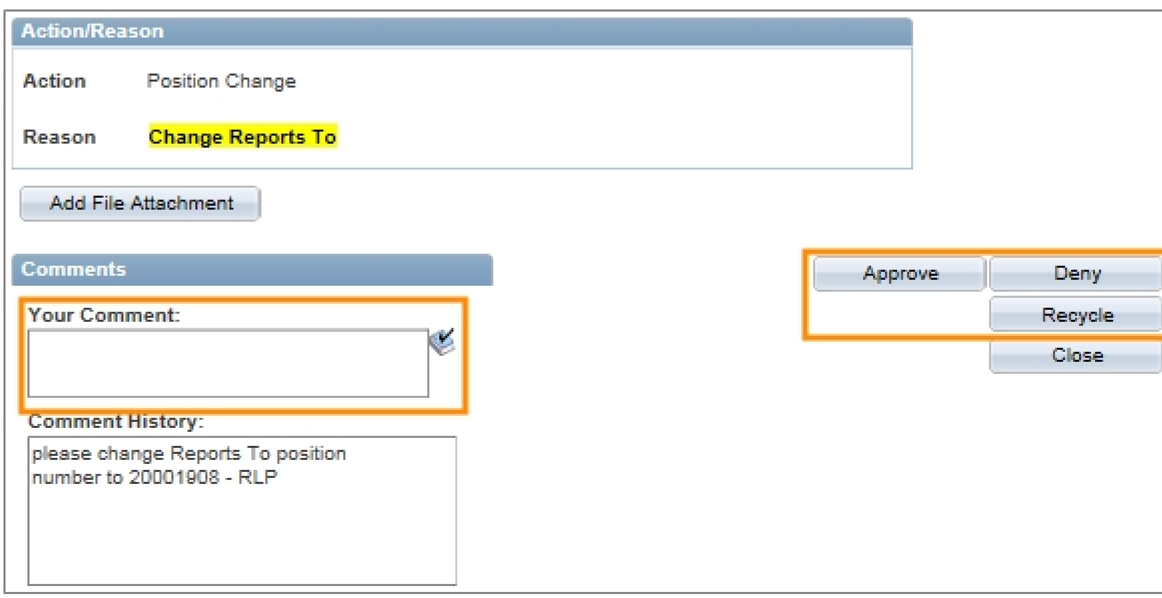
6. Review the information in the ePAR thoroughly. Refer to *Evaluating ePARs, page 70*.

Entering a Decision: Recycle, Deny, Approve

1. In the **Your Comment** field, enter your initials and comments about your decision.

Note: Any comments you add to this form are permanently attached to the form and cannot be edited or deleted at any time.

Caution! Protect social security numbers, credit card information, and other sensitive data; be sure not to type them in the Your Comment, Description, or other free form text fields. Read the University's Information Security policy for more information.



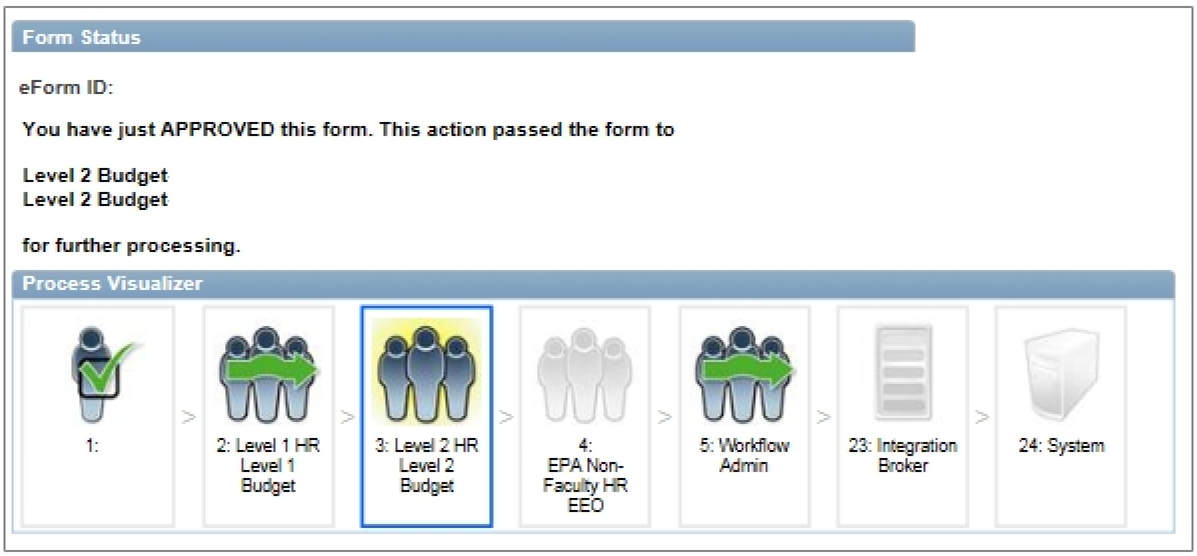
2. At the bottom of the page, do one of the following:
   - If everything looks good, click the **Approve** button.

- If you find any information incorrect and want the ePAR to go back to the originator so that they can correct the information and resubmit the ePAR, click the **Recycle** button.

- If the ePAR is completely and fundamentally wrong and you want the originator to start completely over from scratch, click the **Deny** button.

6. Click the **Yes** button to confirm your action.

Note: If you approved the ePAR, the system displays the Form Status page, showing that the action has been approved. It also highlights the next level it has passed to for further approval. The gray boxes show future approvals needed before the action is complete.



Entering an Approve, Deny or Recycle Decision for a Position ePAR

Overview

Depending on the structure of your unit, school, office or department, HR actions are entered by an originator then flow to an approver who can evaluate the ePAR. Approvers can choose from the following actions:

- **Hold:** Use Hold when you're actively reviewing an ePAR or gathering information. This takes the Position ePAR out of the workflow for other approvers at the same stop.
- **Approve**: Sends the ePAR to the next step in the workflow.
- **Recycle**: Sends the ePAR back to the originator. Allows the originator to make changes to the ePAR and resubmit it.
- **Deny**: Stops this ePAR permanently. The originator needs to generate a completely new action, and start the approval process over. Only use in extreme cases.

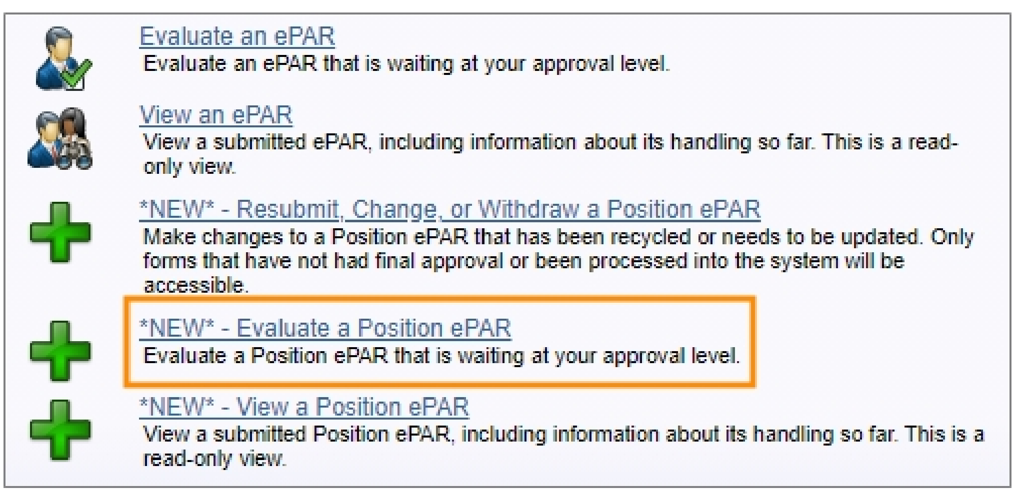
For a broader context, see *Understanding HR Actions and the Approval Process, page 48*

Steps - Evaluating an ePAR

Follow these steps to evaluate an ePAR. If you need to review a Position ePAR, refer to

1. **Admin WorkCenter > HR WorkCenter > ePAR Home Page**

2. Click the ***NEW* - Evaluate a Position ePAR** link.



Result: The system displays the Evaluate Worklist page.

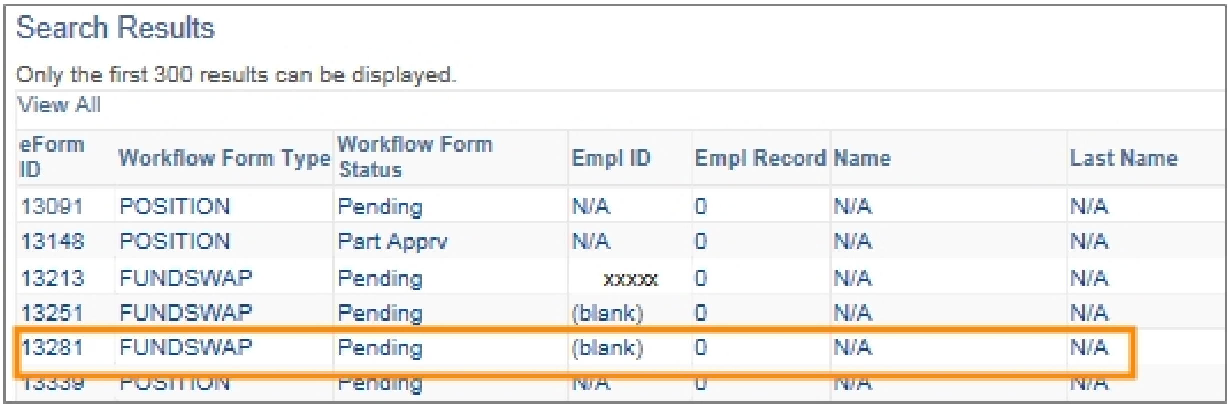
3. Complete the fields to refine your search results, or leave all the fields blank to see all ePARs sent to you and awaiting your action.

In this field:	Do the following:
eForm ID	Enter the unique numeric identifier assigned to this action.
Workflow Form Type	Enter one of the following form types: • **fundswap** for actions to change an employee's funding source • **hire** for actions to hire a new employee • **jobchange** for actions where an employee is changing positions • **lumpsum** for actions to issue a lump sum payment to an employee • **poi** for actions to change data for a person of interest • **position** for actions to create or update a position • **termlvret** for actions to change an employee's status
Workflow Form Status	Leave this field blank.
Empl ID	Enter the employee's PID.
Empl Record	Enter the employee's job record number.
Name	Enter the first name of the person.
Last Name	Enter the last name of the person.
Set ID	Enter **uncch** for the University, **uncga** for General Administration, or a foundation business unit.
Salary Administration Plan	Enter the numeric identifier for this position's assigned salary plan.
Original Operator	Enter the name of the HR representative who submitted this ePAR.
Originated Date From	Enter the date this ePAR was submitted.

4. Click the **Search** button

   Result: The system displays the ePARs that match the criteria you specified.

5. Click the ePAR you want to evaluate.



eForm ID	Workflow Form Type	Workflow Form Status	Empl ID	Empl Record	Name	Last Name
13091	POSITION	Pending	N/A	0	N/A	N/A
13148	POSITION	Part Apprv	N/A	0	N/A	N/A
13213	FUNDSWAP	Pending	xxxxx	0	N/A	N/A
13251	FUNDSWAP	Pending	(blank)	0	N/A	N/A
13281	FUNDSWAP	Pending	(blank)	0	N/A	N/A
13339	POSITION	Pending	N/A	0	N/A	N/A

Result: The system displays the ePAR form with buttons to allow you to take action.

6. Review the information in the ePAR thoroughly. Refer to *Evaluating ePARs, page 70*.

Entering a Decision: Approve, Hold, Recycle, Deny

1. In the **COMMENTS** field, enter your initials and comments about your decision.

Note: Any comments you add to this form are permanently attached to the form and cannot be edited or deleted at any time.

Caution! Protect social security numbers, credit card information, and other sensitive data; be sure not to type them in the Your Comment, Description, or other free form text fields. Read the University's Information Security policy for more information.

2. At the bottom of the page, do one of the following:
   - If everything looks good, click the **Approve** button.
   - If you want to take the ePAR out of workflow while you work on it or get questions answered, click the **Hold** button.

- If you find any information incorrect and want the ePAR to go back to the originator so that they can correct the information and resubmit the ePAR, click the **Recycle** button.

- If the ePAR is completely and fundamentally wrong and you want the originator to start completely over from scratch, click the **Deny** button.

7. Click the **Yes** button to confirm your action.

   Note: If you approved the ePAR, the system displays the Form Status page, showing that the action has been approved. It also highlights the next level it has passed to for further approval. The gray boxes show future approvals needed before the action is complete.