

ConnectCarolina

Student Originators Best Practices

*Presented by Corrie Mimms and Ann Sager
Senior HR Business Analysts*

August 4, 2016





Welcome and Introductions

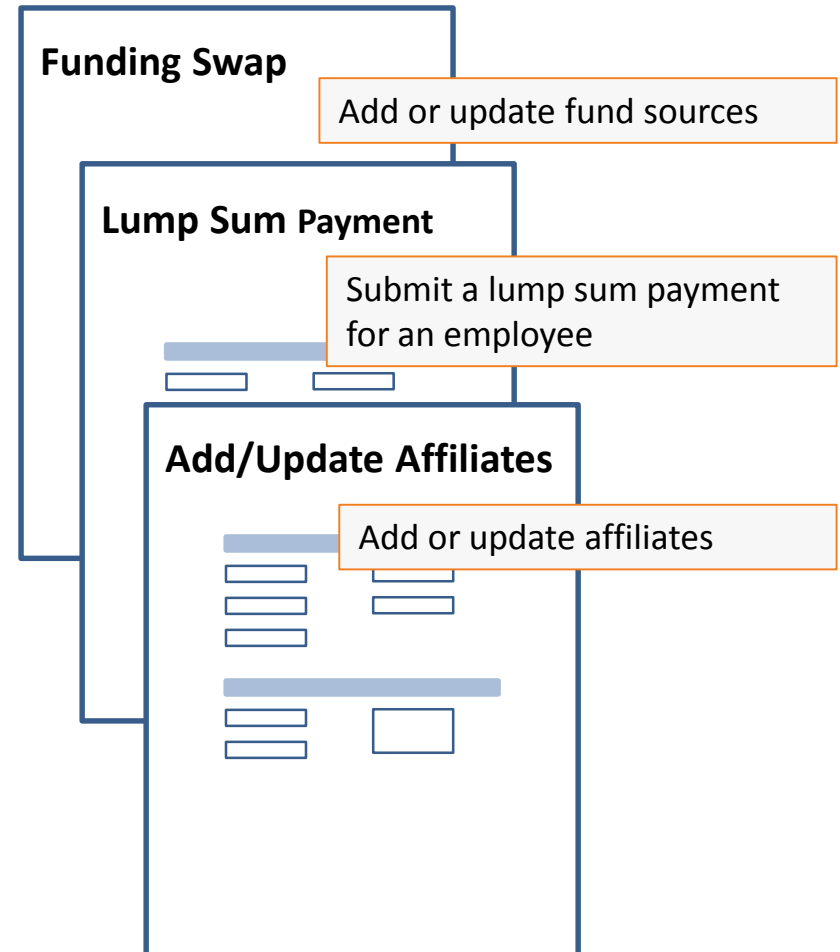
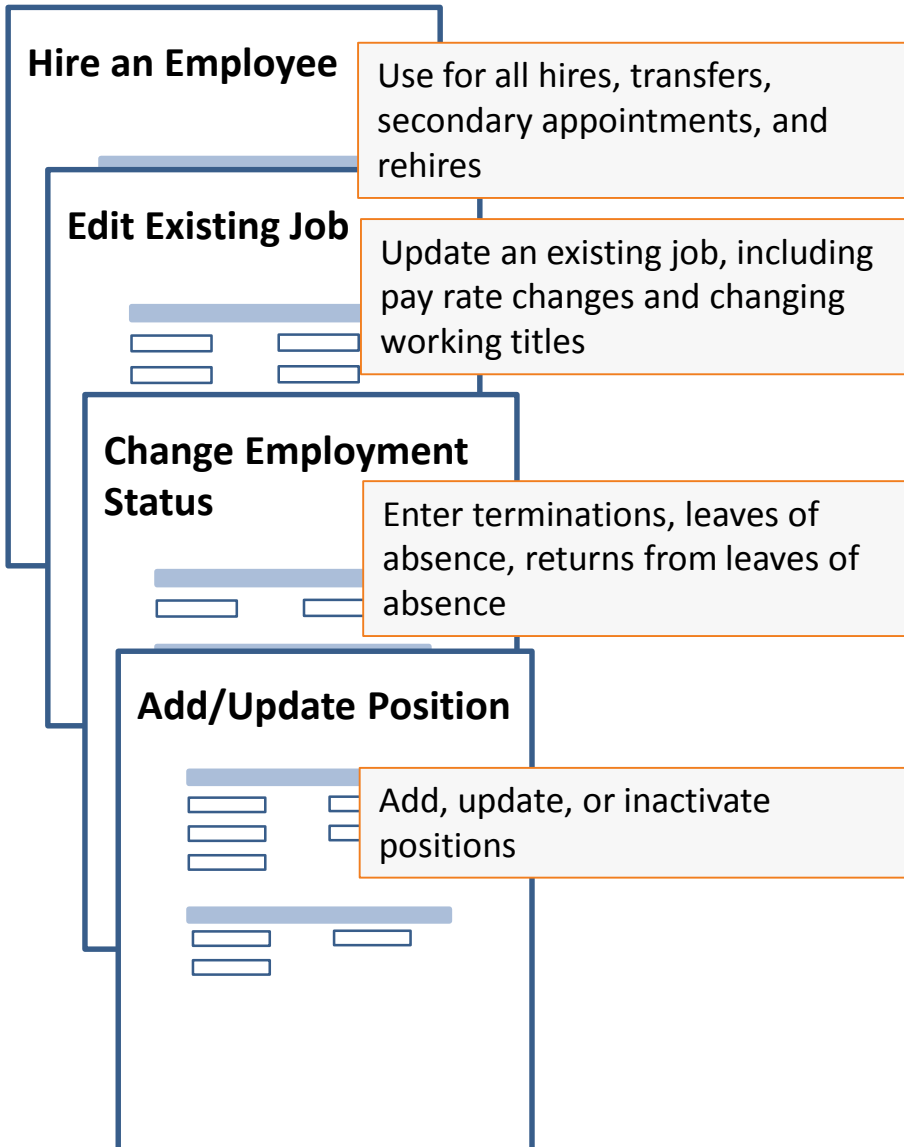
Corrie Mimms

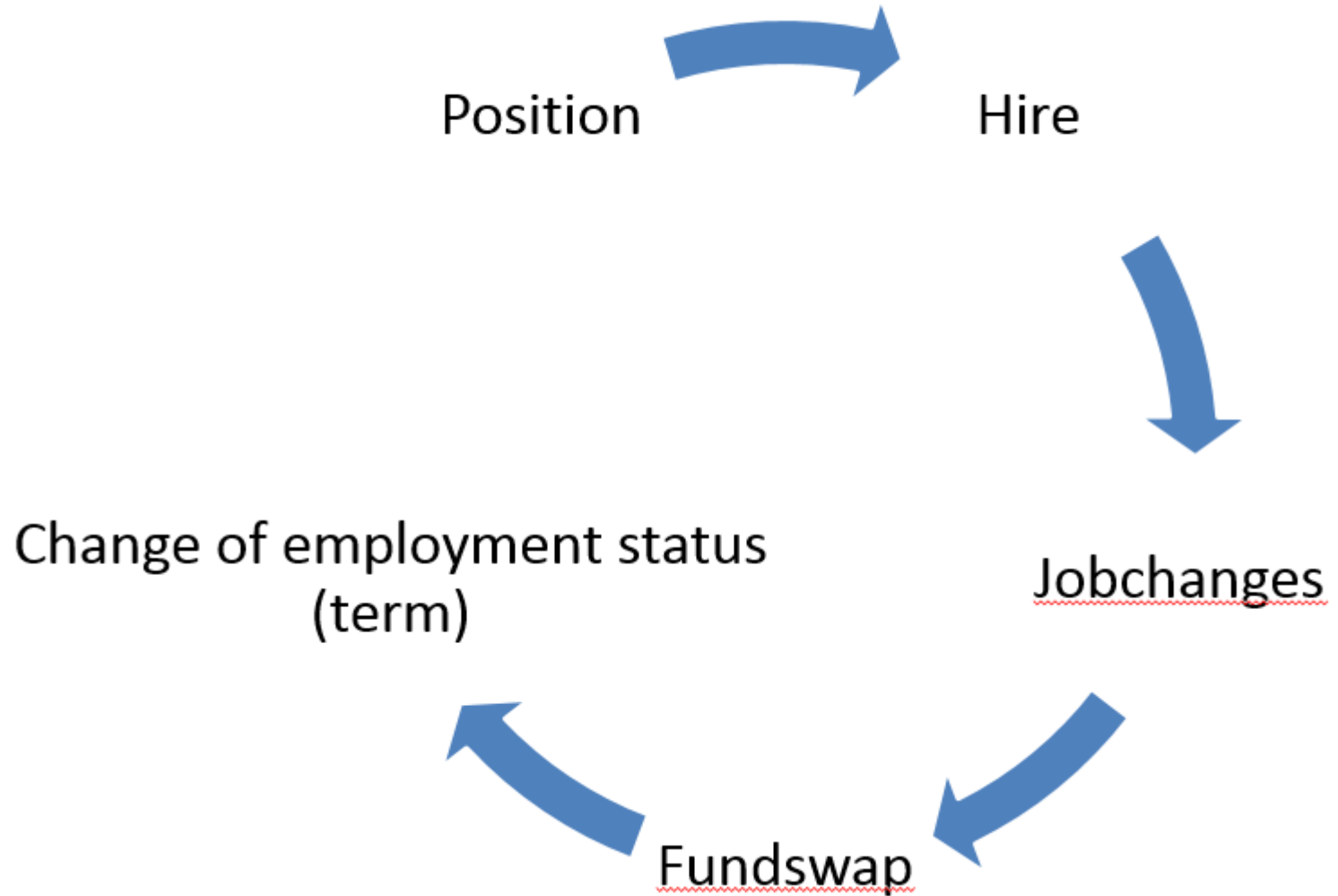
Ann Sager

- Position Overview
- Pre-Hire Steps and Hire ePAR
- Job Changes and Short Work Break
- Fund Swaps
- Expected End Dates and Terminations
- Maximizing ePAR Search
- Additional Information
- Questions?

- How many of you have been using ConnectCarolina since go-live (10/1/2014)?
- How many of you are new(ish) users of ConnectCarolina?
- How many of you didn't raise your hand? 😊
- How many of you use ConnectCarolina on a daily basis?
 - Once a week?
 - Once a month?

The Seven ePAR Forms





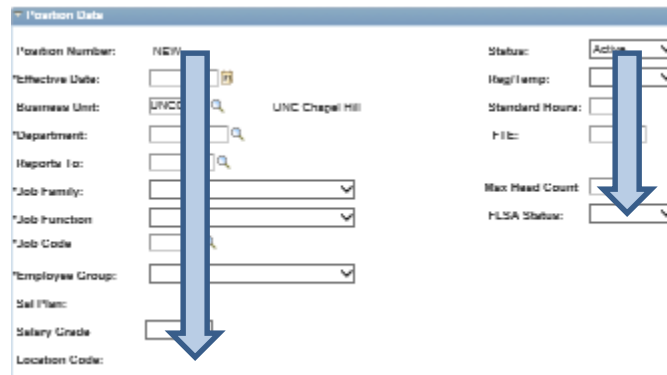


Position Overview

- Overview

- Departments are responsible for creating positions
- Who needs a position?
 - ALL SHRA students
 - 1 student per position (for TIM)
 - Students with multiple jobs needs multiple positions
 - NOT used for EHRA students (optional)
- Once created, positions may be reused
- When entering an ePar be sure to work top to bottom, left to right

#1
TOP to
Bottom



The screenshot shows a 'Position Data' form with the following fields and values:

- Position Number: NEW
- Effective Date: []
- Business Unit: UNCS (UNC Chapel Hill)
- Department: []
- Reports To: []
- Job Family: []
- Job Function: []
- Job Code: []
- Employee Group: []
- Sal Plan: []
- Salary Grade: []
- Location Code: []
- Status: Active
- Flag/Temp: []
- Standard Hours: []
- FTE: []
- Max Head Count: []
- FLSA Status: []

#2
TOP to
Bottom

- Effective Dates
 - Cannot use the same effective date more than once
 - Cannot hire effective prior to the position's effective date
- Position Department Changes (done by Complex Originator)
 - MUST include funding information (grid)
- Positions can be Abolished (must be done by Complex Originator)
- Creating positions – DO NOT REMOVE the NEW reason (action reason)
- Funding only changes – DO NOT USE position ePar USE Fundswap ePar

- When you hire more than one person into the same position
 - Should be one-to-one (one position = one incumbent)
 - This causes BIG issues with the TIM system/interface
 - You can re-use positions; however, please terminate the incumbent before hiring the new student
 - Daily Audit Report
 - You won't have this issue with EHRA students if positions are not used

- All employees must report to a position or a supervisor
- Reports to is on the Position and gets included on the HIRE action
- Supervisor is on the JOB only
- When to use which?
 - Driven by the person to whom the student reports
 - For example: Sally Student is supervised by Billy Joel
 - If Billy Joel is in a position, then use REPORTS_TO field on the position ePar (using Billy Joel's their position #)
 - If Billy Joel is NOT in a position, use Billy's PID on the Hire form

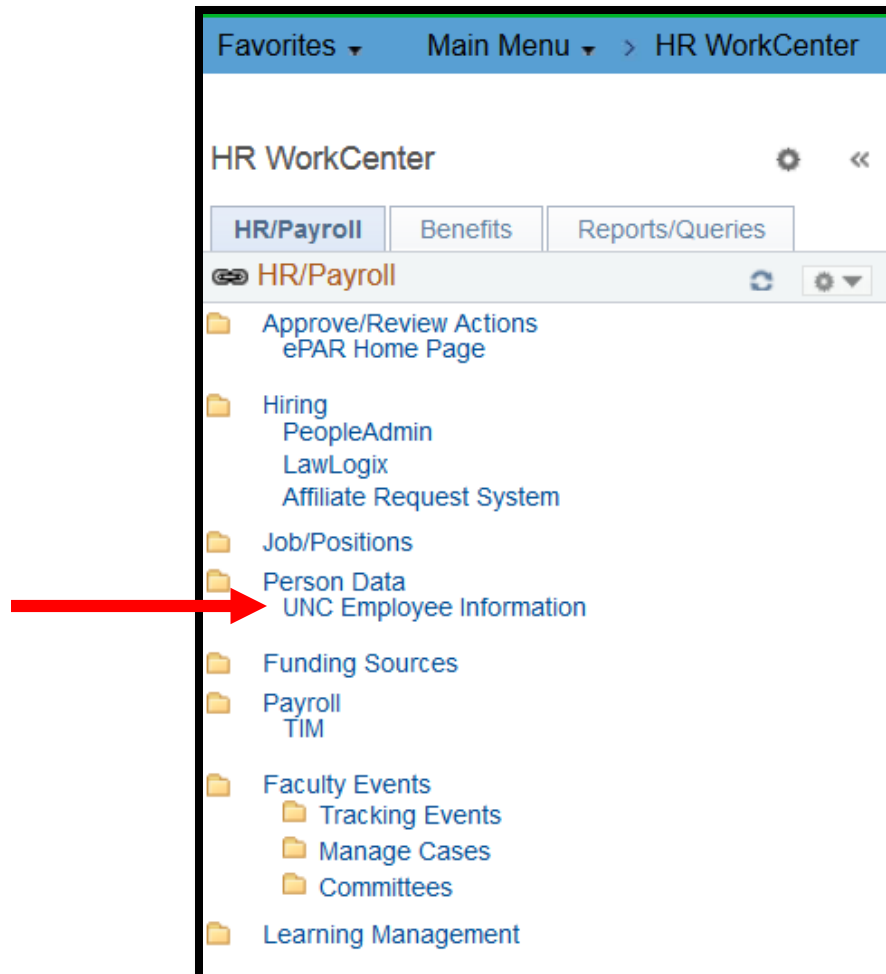


Hires / Transfers

Corrie Mimms

- **UNC Employee Information**

- Quick link on HR Work Center under Person Data folder



- **UNC Employee Information**

- Department
- HR Status
 - Active / Inactive
- Payroll Status
 - Active / Work Break / Leave / Terminated
- Job Code
- Empl Record
- FTE (Full-time equivalency)
- Job Indicator (Primary/Secondary)
- Expected Job End Date
- Position Number
- Supervisor ID / Reports To

UNC Employee Information


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Empl ID:	begins with ▼	730143983
Name:	begins with ▼	
Last Name:	begins with ▼	
Alternate Character Name:	begins with ▼	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

UNC Employee Information

UNC Employee Information

Steve Student

EmplID: 730143983

UNC Employee Information

Department:	330100 Kenan-Flagler Bus Sch	Empl Record:	0
Job Function:	EPA Students / Teaching Fellow	FTE:	0.250
HR Status:	Active	TSERS Re-employed Retiree:	<input type="checkbox"/>
Payroll Status:	Active	Job Indicator:	Primary
Regular/Temporary:	Temporary	Service Period:	
Full/Part:	Part-Time	Expected Job End Date:	01/01/2017
Job Code:	Graduate Research Assistant	Position Number:	
Job Code Set ID:	UNCCH	Supervisor ID:	708478916 Corrie Mimms
Company:	UNC UNC Chapel Hill	Reports To:	

UNC Employee Information

Department:	330100 Kenan-Flagler Bus Sch	Empl Record:	0
Job Function:	EPA Students / Teaching Fellow	FTE:	0.250
HR Status:	Active	TSERS Re-employed Retiree:	<input type="checkbox"/>
Payroll Status:	Active	Job Indicator:	Primary
Regular/Temporary:	Temporary	Service Period:	
Full/Part:	Part-Time	Expected Job End Date:	01/01/2017
Job Code:	Graduate Research Assistant	Position Number:	
Job Code Set ID:	UNCCH	Supervisor ID:	708478916 Corrie Mimms
Company:	UNC UNC Chapel Hill	Reports To:	

Department:	316400 Public Policy	Empl Record:	1
Job Function:	SPA Students	FTE:	0.125
HR Status:	Active	TSERS Re-employed Retiree:	<input type="checkbox"/>
Payroll Status:	Active	Job Indicator:	Secondary
Regular/Temporary:	Temporary	Service Period:	
Full/Part:	Part-Time	Expected Job End Date:	01/01/2017
Job Code:	SPA Student Assistant	Position Number:	20016872
Job Code Set ID:	UNCCH	Supervisor ID:	
Company:	UNC UNC Chapel Hill	Reports To:	00062189 Business Systems Analyst

- Postings / Waivers:
 - Required for non-UNC Chapel Hill student hires
- When is a Background Check necessary?
 - Student employees working with residential programs (Resident Advisors)
 - Student employees working with minors
 - Refer to the Protection of Minors policy
<http://policies.unc.edu/policies/protection-of-minors/>
 - Starr Barbaro, POM Coordinator
 - Students who are not enrolled or do not re-enroll at UNC-Chapel Hill
- Background check results must be completed and cleared prior to hire date

- When is an I-9 necessary?
 - All student appointments unless there is an active I-9 on file and there has been no break in service of one or more days
- I-9 must be completed as follows:
 - Section 1 on or before the date of hire
 - Section 2 within three days of the hire date
- PID Creation for Minors:
 - See Employment forms on HR's website
 - [http://hr.unc.edu/files/2014/09/Empl ID Request no Bkgd Chk.pdf](http://hr.unc.edu/files/2014/09/Empl_ID_Request_no_Bkgd_Chk.pdf)

- Hire an Employee ePAR
 - Hires, Transfers, Secondary appointments, and Rehires
- Hire/Transfer is used when there will be no break in service
 - Weekends are not considered a break in service
 - Term / Rehire should only be used when there is a break in service
 - Receiving department responsible for initiating the hire
- **WARNING:** Always search on the person's PID/Empl ID
- **CAUTION:** Coordinate with current to department to ensure smooth transition for transfers



- **REMINDER:** Complete fields top to bottom

Authorized by

Hire an Employee

Step 1 of 5: Job Information

Indicate the type of employee you are hiring by choosing a value in the Empl Group field. For employee groups where Position Number is required, it will appear. Fill out the rest of the fields, and choose Next.

Personal Info

Name: Steve Student [Position Data](#)

Empl ID: 730143650 [Job Data](#)

eForm ID: 486562

Form Data

*Effective Date: it Set ID:

*Job Family: Q

*Employee Group:

Other Job Actions

This employee has at least one active job with the university already. Is he/she leaving a job at the university for this one?

Edit Existing Job?





Fall Semester – Hire/Work Break deadlines

- **Deadlines**

- New Hires, Short Work Break, and Return from Work Break actions
- M02 monthly School/Division deadline: noon, Thursday, August 18
 - Payroll lockout noon, Tuesday, August 23
- B04 biweekly School/Division deadline: noon, Tuesday, August 23
 - Payroll lockout noon, Friday, August 26
 - Pay Period August 8 – August 21
- B05 biweekly School/Division deadline: noon, Tuesday, September 6
 - Payroll lockout noon, Friday, September 9
 - Pay Period August 22 – September 4
- Monthly calendars with deadlines available on ccinfo website
 - <http://ccinfo.unc.edu/resource-docs/hr-payroll-calendar/>

- Compensation rates
 - SHRA = hourly
 - EHRA = monthly flat rate
- Stipend Calculator (EHRA only)
 - We recommend using the Stipend Calculator, which is available on the Graduate School's website, under Policies:
<http://gradschool.unc.edu/policies/faculty-staff/gradstar/>
- Expected Job End Date
 - Always add a day!



Edit Existing Job and Short Work Breaks

- Examples of Job Changes:
 - Pay Rate change
 - FTE Change (non-positioned only)
 - TIM Approver change
 - Supervisor ID change
 - Expected Job End Date change
 - Reappointment
 - Working Title
 - Short Work Break / Return from Work Break

- EHRA Students
 - Extending appointment for a semester or longer
 - Job Change / Reappointment
 - Returning from Short Work Break
 - Return from Work Break / EHRA Reappointment
 - Extending Expected Job End Date by a day or two
 - Data Change / Expected End Date Change

- SHRA Students
 - Data Change / Expected End Date Change

- ConnectCarolina will default an Action and Action Reason code based on the information entered on the ePar
- The system does not always get it right
- Review and update (add or remove) the Action and Action Reason values to reflect the information entered on the ePar

- Short Work Break
 - Keeps an EHRA Student's HR status Active while making the Payroll status inactive
 - Short Work Break = not paid for that Empl Rec

- Edit Existing Job ePAR
 - FTE
 - Expected Job End Date
 - Compensation/Funding: do not touch
 - Action / Action Reason
 - Short Work Break / EHRA Short Work Break

- Restarting job and compensation
 - Job Change / Reappointment **DOES NOT** change payroll status
 - Hire/Transfer **DOES NOT** change payroll status
- **Return from Work Break / EHRA Student Reappointment is required to restart pay on the Empl Record**
 - Reappointments
 - Hire/Transfer
- Edit Existing Job ePAR
 - FTE
 - Expected Job End Date
 - Compensation and Funding
 - Do not check “I do not wish to update compensation/funding on this action”

- Steve is coming back from work break. Additionally, his pay rate is increasing and his supervisor has changed.

▼ Current Job Info

Name: Steve Student **Empl ID:** 730143983
Position: **Empl Record:** 0

Job Code: 800170 Graduate Research Assistant [Historical Data](#)
Dept ID: 330100 Kenan-Flagler Bus Sch

Empl Status: Work Break
eForm ID: 490871

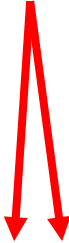
Actions & Action Reasons

	Action Code	Action Description	Reason Code	Action Reason Description		
1	PAY	Pay Rate Change	<input type="text"/>		+	-
2	DTA	Data Change	SPV	Supervisor Change	+	-
3	DTA	Data Change	<input type="text"/>		+	-

- Steve is coming back from work break. Additionally, his pay rate is increasing and his supervisor has changed.

▼ **Current Job Info**

Name:	Steve Student	Empl ID:	730143983
Position:		Empl Record:	0
Job Code:	800170 Graduate Research Assistant	Historical Data	
Dept ID:	330100 Kenan-Flagler Bus Sch		
Empl Status	Work Break		
eForm ID:	490871		



Actions & Action Reasons

	Action Code	Action Description	Reason Code	Action Reason Description		
1	PAY	Pay Rate Change	STM	Student/Temp Pay Adjustment	+	-
2	DTA	Data Change	SPV	Supervisor Change	+	-
3	RWB	Return from Work Break	GSR	EPA Student Reappointment	+	-



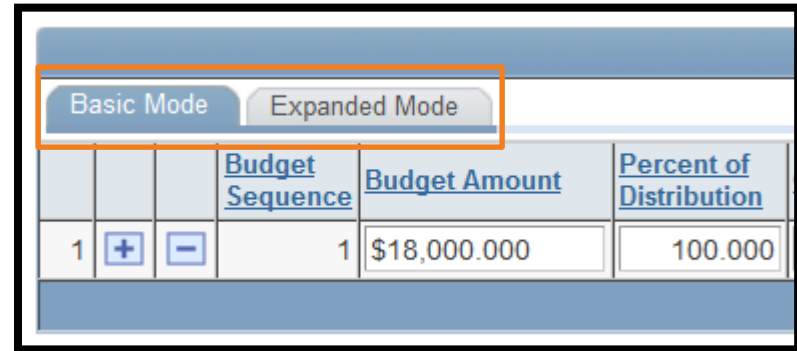
Fund Swaps

- Change funding for an existing position or appointment
 - Change the dollar amount or percent for existing funding
 - Only for Current Pay Period or Future Pay Periods
 - Retro funding changes entered into PAAT (Payroll Accounting Adjustment Tool)

Enter funding sources in one of two ways:

- Basic Mode
 - Using a combo code

- Expanded Mode
 - Using a chartfield string



			Budget Sequence	Budget Amount	Percent of Distribution
1	+	-	1	\$18,000.000	100.000

Funding is displayed in grids

Find First 1-2 of 2

***Effective Date** 04/01/2016 + -

Eff Sequence 0

Budget Amount 18000.00

Personalize | Find | First 1-2 of 2 Last

Basic Mode
Expanded Mode

		Earnings Code	Budget Sequence	Budget Amount	Percent of Distribution	Combo Code	Combo Code Description	Funding End Date	Future Year Budget	Future Year Amount
1	+	-	🔍	1 \$9,000.000	50.000	000236042 🔍	20101-12001-511170-330100	📅	<input type="checkbox"/>	
2	+	-	🔍	1 \$9,000.000	50.000	000241510 🔍	20103-12586-511170-330100	📅	<input type="checkbox"/>	

Total \$18,000.000 **Percent** 100.000 **Unfunded Amount** \$0.000 Reconcile

Effective Date 01/01/2016 + -

Eff Sequence 0

Budget Amount 18000.00

Personalize | Find | First 1 of 1 Last

Basic Mode
Expanded Mode

		Earnings Code	Budget Sequence	Budget Amount	Percent of Distribution	Combo Code	Combo Code Description	Funding End Date	Future Year Budget	Future Year Amount
1	-			1 \$18,000.000	100.000	000241510	20103-12586-511170-330100		<input type="checkbox"/>	

Total \$18,000.000 **Percent** 100.000 **Unfunded Amount** \$0.000

If grids have the same effective date, the grid with the highest effective sequence is the most recent.

Effective Date 04/01/2016

Eff Sequence 2

Budget Amount 18000.00

Personalize | Find | First 1 of 1 Last

Basic Mode		Expanded Mode								
	Earnings Code	Budget Sequence	Budget Amount	Percent of Distribution	Combo Code	Combo Code Description	Funding End Date	Future Year Budget	Future Year Amount	
1	+	1	\$18,000.000	100.000	000241510	20103-12586-511170-330100		<input type="checkbox"/>		
		Total	\$18,000.000	Percent	100.000	Unfunded Amount	\$0.000			



Tip! The original funding grid will always have Eff Sequence 0.



Expected End Date and Terminations

Ann Sager

- Expected End Date (EED) is the date when the next action should take place
 - Reappointment
 - Termination
 - Short Work Break/Return from Work Break

Examples

Graduate Student is hired for the fall semester only EED = 1/1/2017

Graduate Student is hired for the full year EED = 5/16/2017

Undergraduate Student is hired for the month of October EED = 11/1/2016

Undergraduate Student is hired until the winter break EED = 12/16/2016

Graduate Student will be on work break in the fall, return in the spring EED = 1/1/2017

- SHRA Students will automatically be terminated once they reach their expected job end date
 - If they are going to continue, process a JOBCHANGE action to extend their expected job end date BEFORE they are auto termed
 - Help desk tickets to remove the termination are extra work for all of us
 - Do NOT rehire if there is no break in service, submit the help desk ticket
- EHRA Students – no automated terminations
 - You must monitor your EED Report (Infoporte) and process actions (termination or extension)
 - EHRA students will continue to get paid EVEN IF their EED passes
 - These are the #1 overpayment type – we can do better!



- Effective Date
 - The date WHEN the termination begins
 - Add a day to Last Day Worked
 - If I am resigning effective the end of the calendar year
 - Termination Effective date is 1/1/2017
 - The first day I will no longer be employed
- No action (JOBCHANGE/TERM etc) can have an effective date LATER than the expected end date
 - Example:
 - Expected Job End Date (EED) is 12/31/2016
 - Term date cannot be 1/1/2017
 - You would need to do a JOBCHANGE to extend the EED to 1/1/2017, then process the termination (do not do a termination for 12/31/2016 you will short the employee by one day of pay [EHRA])

- Infoporte report defaults to Primary job only
 - Clear the filter to pull in both Primary and Secondary jobs

A | Job Family | P

P

→ P
Clear Filter
N
P
S

→ Primary Job
Clear Filter
N
P
S

Primary Job

Compensation/Funding check box

- JOBCHANGE

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

- If you start the ePar and do NOT check the box, then you get to the compensation page and you use the PREVIOUS button, you will get a message that COMPENSATION will be removed

- **IT WILL BE REMOVED**

- Either abandon the ePar or continue with the funding on it

- POSITION

- Enter funding data for this position:

Note that the boxes differ (one is positive and one is negative)



Maximizing ePar Search

Corrie Mimms

- Tools to help you filter search results for View an ePar
 - Searching with multiple Workflow Status values at one time using 'In'
 - Searching by a range of Effective Dates (Action Date field on Search)
 - Using a wildcard (%) to search by a range of department numbers
 - Combining multiple search criteria to maximize search capabilities
- Tips for Searching for ePARs reference document
 - <https://ccinfo.unc.edu/files/2016/01/Tips-for-Searching-for-ePARs1.pdf>

Status	Description
Pending	Submitted but with no approvals yet
Part Apprv	Partially Approved
Withdrawn	Withdrawn by Originator or Workflow Administrator (Help Desk/Business Analysts)
On Hold	On Hold by originator
Denied	Denied in Approval Process (removed from workflow, not recycled to originator)
Authorized	Fully approved, but is stuck at Integration Broker
Executed	Has gone through the Integration Broker and updated in ConnectCarolina
Recycled	An approver has sent back to originator for updates



Originator will receive a notification email

Searching with multiple workflow statuses at the same time

Change the Workflow Form Status default from '='

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	<input type="text"/>
Empl ID:	begins with	<input type="text"/>
Last Name:	begins with	<input type="text"/>
Department:	begins with	<input type="text"/>
Job Family:	begins with	<input type="text"/>
Employee Group:	=	<input type="text"/>
Action Date:	=	<input type="text"/>
Workflow Form Type:	begins with	<input type="text"/>
Workflow Form Status:	=	<input type="text"/>
Original Operator:	begins with	<input type="text"/>

Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

Change the Workflow Form Status default to 'in', then use the control key (Ctrl) to make multiple selections from the Workflow Form Status dropdown

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	
Empl ID:	begins with	
Last Name:	begins with	
Department:	begins with	
Job Family:	begins with	
Employee Group:	=	
Action Date:	=	
Workflow Form Type:	begins with	
Workflow Form Status:	in	<ul style="list-style-type: none">AuthorizedDeniedExecutedIn ErrorOn HoldPartially ApprovedPendingSignedWithdrawn
Original Operator:	begins with	

Case Sensitive

Searching by effective date (Action Date) using a date range

Change the Action Date default from '='

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	<input type="text"/>
Empl ID:	begins with	<input type="text"/>
Last Name:	begins with	<input type="text"/>
Department:	begins with	<input type="text"/>
Job Family:	begins with	<input type="text"/>
Employee Group:	=	<input type="text"/>
Action Date:	=	<input type="text"/>
Workflow Form Type:	begins with	<input type="text"/>
Workflow Form Status:	=	<input type="text"/>
Original Operator:	begins with	<input type="text"/>

Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

Searching by effective date (Action Date) using a date range

Change the Action Date default to 'Between' then enter your date range

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	
Empl ID:	begins with	
Last Name:	begins with	
Department:	begins with	
Job Family:	begins with	
Employee Group:		
Action Date:	between	10/01/2015 and 10/31/2015
Workflow Form Type:	begins with	
Workflow Form Status:	=	
Original Operator:	begins with	

Case Sensitive

Use 'Begins with' plus a wildcard (%) on the Department field to search by a range of department numbers

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	
Empl ID:	begins with	
Last Name:	begins with	
Department:	begins with	223%
Job Family:	begins with	
Employee Group:	=	
Action Date:	=	
Workflow Form Type:	begins with	
Workflow Form Status:	=	
Original Operator:	begins with	

Case Sensitive



Use 'Between' plus two wildcards (%) on the Department field search by a large range of department numbers

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

eForm ID:	begins with ▼	<input type="text"/>
Empl ID:	begins with ▼	<input type="text"/>
Last Name:	begins with ▼	<input type="text"/>
Department:	between ▼	42% and 44%
Job Family:	begins with ▼	<input type="text"/>
Employee Group:	= ▼	<input type="text"/> ▼
Action Date:	= ▼	<input type="text"/> 
Workflow Form Type:	begins with ▼	<input type="text"/> 
Workflow Form Status:	= ▼	<input type="text"/> ▼
Original Operator:	begins with ▼	<input type="text"/>

Case Sensitive




Combine multiple search criteria to maximize search capabilities.

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

eForm ID:	begins with	
Empl ID:	begins with	
Last Name:	begins with	
Department:	begins with	30%
Job Family:	begins with	EPA
Employee Group:	=	
Action Date:	between	10/01/2015  and 10/31/2015 
Workflow Form Type:	begins with	
Workflow Form Status:	in	<ul style="list-style-type: none"> Authorized Denied Executed In Error On Hold Partially Approved Pending Signed Withdrawn
Original Operator:	begins with	

Do you have a search you use regularly?



Save it!

ePAR Employee History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

eForm ID:	begins with ▼	<input type="text"/>
Empl ID:	begins with ▼	<input type="text"/>
Last Name:	begins with ▼	<input type="text"/>
Department:	begins with ▼	<input type="text"/>
Job Family:	begins with ▼	<input type="text"/>
Employee Group:	= ▼	<input type="text"/> ▼
Action Date:	= ▼	<input type="text"/> 
Workflow Form Type:	begins with ▼	<input type="text"/> 
Workflow Form Status:	in ▼	<ul style="list-style-type: none"> Authorized Denied Executed In Error On Hold Partially Approved Pending Signed Withdrawn
Original Operator:	begins with ▼	<input type="text"/>

Case Sensitive

Name the search and click Save.

Save Search As

Name the search and then click Save.

Name of Search:

The saved search will contain these values:

eForm ID:	begins with
Empl ID:	begins with
Last Name:	begins with
Department:	begins with
Job Family:	begins with
Employee Group:	=
Action Date:	=
Workflow Form Type:	begins with
Workflow Form Status:	in Authorized, Partially Approved, Pending
Original Operator:	begins with

 [Return to Advanced Search](#)

Save Search As

Search saved as ePARs in progress.

[Return to Advanced Search](#)

Saved Searches appear in the Use Saved Search drop down.

▼ Search Criteria

Use Saved Search: ▼

eForm ID:

Empl ID: ▼

Last Name: ▼

Department: ▼

Job Family: ▼

Employee Group: ▼

Action Date: ▼ 31

Workflow Form Type: ▼ 🔍

Workflow Form Status: ▼

Original Operator: ▼

Case Sensitive



Additional Information

Ann Sager

- What is a retroactive transaction?
 - Any action where the effective date is earlier than today's date
- Which ones need special attention?
 - New Hire action with an effective date already paid
 - Example M01 payroll lockout was 7/21/2016 at noon
 - Period covered was 7/1/2016 through 7/31/2016
 - On 7/22/2016, you enter a transaction for a new hire effective 7/15/2016
 - » This person missed the July payroll, their first payroll will be August
 - » Retro pay does NOT automatically kick-in for them and the student will be underpaid for the 17 days of July (7/15/2016-7/31/2016)
 - **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

#1

#2

- Student on Short Work Break & returned AFTER that payroll
 - Example M01 payroll lockout was 7/21/2016 at noon
 - Period covered was 7/1/2016 through 7/31/2016
 - Student has been on Short Work Break since 5/16/2016
 - On 7/22/2016, you enter a Return from Work Break effective 7/15/2016
 - » This person WAS NOT ON the July payroll
 - » Retro pay does NOT automatically kick-in for them and the student will be underpaid for the 17 days of July (7/15/2016-7/31/2016)
- **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

Any effective date for a previous payroll where the person was not paid on that previous payroll for that empl_rcd, retro pay will NOT pick up the transaction

EHRA → SHRA transfer retroactively – DO A TICKET

SHRA → EHRA transfer retroactively – DO A TICKET

EHRA student with a new secondary job (retroactively) – DO A TICKET

#3

- Student has an active EHRA student job (empl_rcd 0) and is now given a secondary job (empl_rcd 1)
 - Example M01 payroll lockout was 7/21/2016 at noon
 - Period covered was 7/1/2016 through 7/31/2016
 - On 7/22/2016, you enter a new hire effective 7/15/2016 (empl_rcd 1)
 - » IN AUGUST
 - » This person gets paid for empl_rcd 0 and empl_rcd 1
 - » Retro pay does NOT automatically kick-in for empl_rcd 1 and the student will be underpaid for the 17 days of July (7/15/2016-7/31/2016) for empl_rcd 1
- **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

- Do not start an ePar with an effective date more the 90 days in advance
 - WHY NOT?
 - Approvers
 - Terminated approvers cause ePars to STOP routing
 - New approvers won't be part of the approval chain
 - ePar software/logic
 - Any bug fixes, configuration changes, will not be part of this ePar
 - » (may fail upon submission)
 - Other data changes may cause these to fail
 - Helps lower the chance of midstack errors

- What is a Mid-Stack?
- Let's say you hired an student effective 6/1/2016
- Then you change the TIM Approver 8/1/2016
- Now you find out that there should have had a pay increase effective 7/1/2016.

8/1/2016 – TIM Approver change

6/1/2016 – New Hire

7/1/2016 – Pay Change

Must be
manually
entered by BAs

The system always puts things on the TOP. But this needs to fit in the middle of the stack (mid-stack).

It gets stuck!



- Do NOT use the Edit Existing Job ePar (JOBCHANGE) to change funding – use the FUNDSWAP ePar
 - They clutter the job history
 - We will withdraw them if we see them 😞



Additional Information

Corrie Mimms

- **Tips to avoid problems with Action / Action Reason on your ePars**
 - Review the Action / Action Reasons carefully prior to Submit
 - Add, Remove, or Update Actions and Action Reason codes to reflect the information entered on the ePar
 - Always change the Action first (left) and then select the Action Reason (right)
 - Invalid combinations will cause the ePAR to get stuck
 - Pay Rate Change Action should always be used when pay is updated

- **When to ask for help**
 - Some ePar actions get stuck at Authorized (Integration Broker) and require manual intervention by the Help Desk / Business Analysts
 - If ePar is stuck at Authorized for 24 hours or more (except during payroll lockout)
 - If you know your action will require manual intervention by the Help Desk / Business Analysts (ie. mid-stack)
 - If you aren't sure of the best way to handle an action

- Daily audit reflects employees with inactive Primary jobs and active Secondary jobs **OR** employees with multiple Primary jobs
- When there is no Primary job, the Secondary job is made Primary
 - When no primary job, then employee cannot code time in TIM

- If multiple secondary jobs or more than one job is Primary:
 - Permanent appointments would be Primary over Temporary
 - EHRA would be Primary over SHRA
 - Employee jobs would be Primary over Contingent Worker jobs
 - Jobs with no Expected Job End Date or the job with the greater Expected Job End Date would be Primary
- If a Primary / Secondary designation needs to be updated, submit a HELP ticket
 - Requires approval from both departments

- Student Originators have the ability to submit hires, job changes, and termination actions for all Student jobs
 - Be mindful of the Empl Record you are working with
 - Use the UNC Employee Information page
- Use comments in the ePAR to provide additional information about the action
- If a Student is overpaid, a HELP ticket is required
 - Ensure Termination or Short Work Break action has executed in system

- Resources
 - <http://ccinfo.unc.edu/resources/>
 - Student Originators Manual
 - Keyword search
 - HELP Desk
 - 962-HELP
 - help.unc.edu

- Protection of Minors policy
 - <http://policies.unc.edu/policies/protection-of-minors/>
- PID Creation for Minors
 - <http://hr.unc.edu/files/2014/09/Empl ID Request no Bkgd Chk.pdf>
- Monthly Payroll calendars
 - <http://ccinfo.unc.edu/resource-docs/hr-payroll-calendar/>
- Stipend Calculator
 - <http://gradschool.unc.edu/policies/faculty-staff/gradstar/>
- Tips for Searching for ePARs reference document
 - <https://ccinfo.unc.edu/files/2016/01/Tips-for-Searching-for-ePARs1.pdf>



Questions?