

Connect
CAROLINA



Reporting



Affiliates Report

VERSION: 03/12/2019

Affiliates Report

Purpose of This Report

The Affiliates Report shows information on all active affiliates or affiliates who were terminated within the last year. You can see and filter by the following information:

- affiliate's name
- employee ID number (PID)
- department
- status
- sponsor's name
- affiliate type
- effective date
- end date

Who Uses This Report

If you have access to create HR funding, student, or affiliate actions or if you are an HR representative, you will automatically be given access to this InfoPorte report.

When to Use This Report

You can use this report anytime you need to check the status of an affiliate.

Where Information Comes From

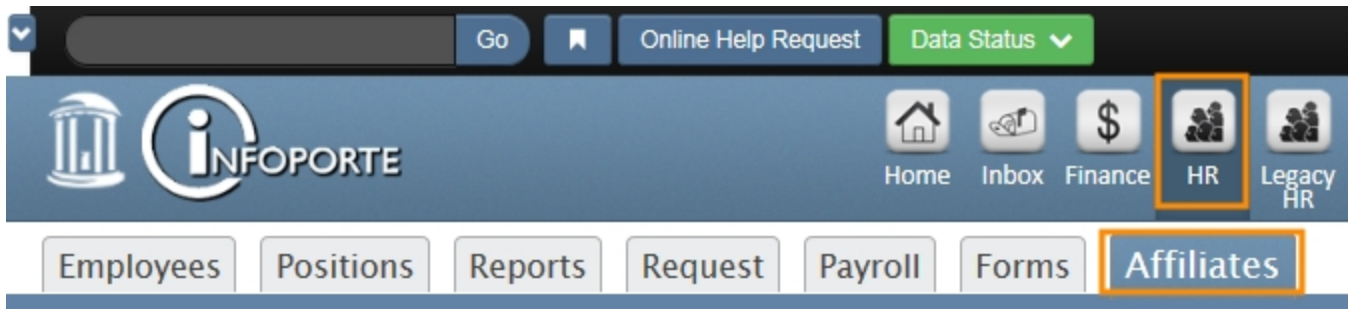
Information for this report is pulled nightly from ConnectCarolina. The source of this information is the Affiliate ePAR.

Where to Find This Report

Follow these steps to run the Affiliates Report:

1. Choose this menu option:

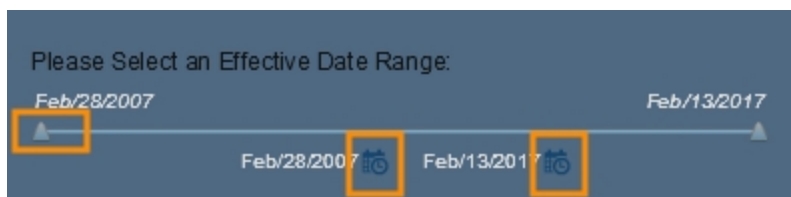
InfoPorte > HR > Affiliates



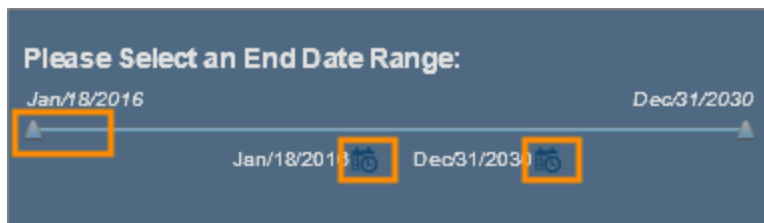
2. Do any of the following:

- If you want to see the report based on the effective date, slide the arrow on the date line of the **Effective Date Range** field.

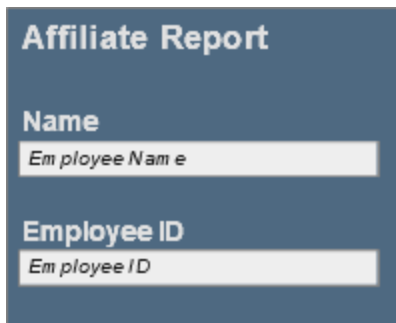
Note: Anytime you see the clock/calendar icon, you can click on the icons to select the date from a monthly view.



- If you want to see the report based on the end date, slide the arrow on the date line of the **End Date Range** field.



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- If you want to see the report based on a specific employee, you can enter the employee's name in the **Name** field or you can enter the employee's ID (PID) in the **Employee ID** field.

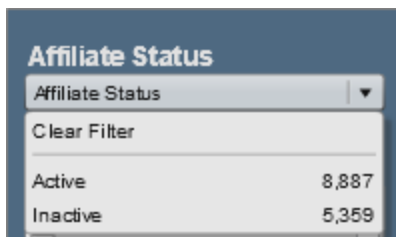


Affiliate Report

Name
Employee Name

Employee ID
Employee ID

- If you want to see the report based on whether the affiliate is active or inactive, you can choose from those options on the **Affiliate Status** drop down box. If you select Clear Filter, your results will show both active and inactive affiliates in your results.



Affiliate Status

Affiliate Status ▼

Clear Filter

Active	8,887
Inactive	5,359

- If you want to see specific types of affiliates, you can check the boxes next to the affiliate types.



Affiliate Type

- AHEC Affiliate
- Campus Ministries / Hillel
- Carolina Club Employee
- Carolina Dining Employee
- Committee/Board Member
- EHS Associate
- Emergency Official

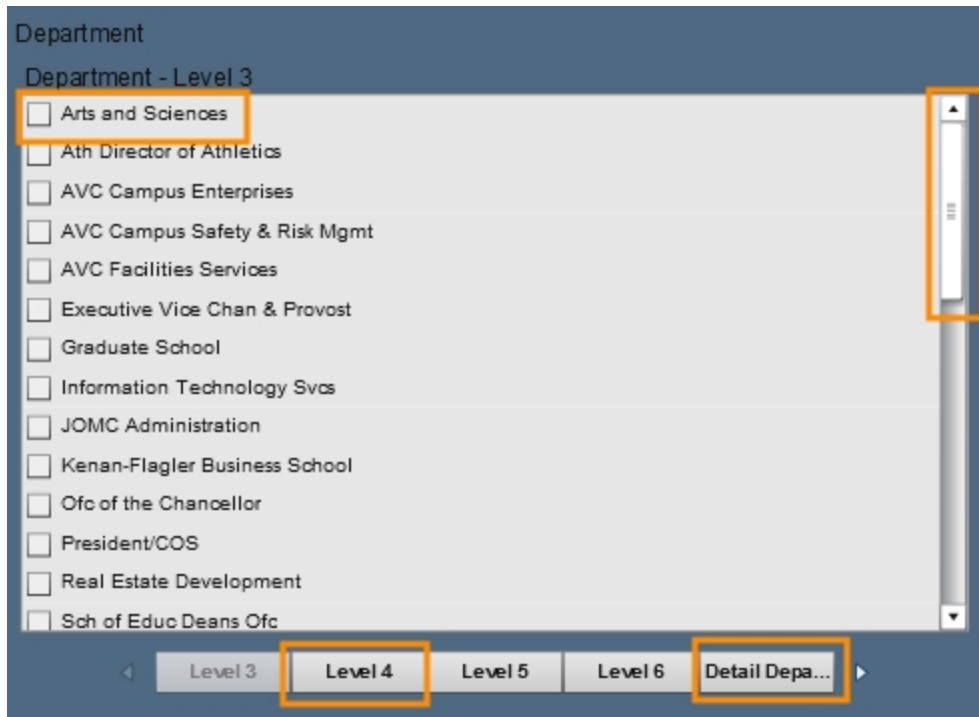
Affiliate Type	Description	Preferred Time Limits
AHEC Affiliate	AHEC professionals who need access to the AHEC system housed at the University.	5 years max.
Campus Ministries/Hillel	Ministers and staff of Campus Ministries, Campus Crusades, and NC Hillel.	1-2 years max.
Carolina Club Employee	Employees of the Carolina Club.	5 years max.
Carolina Dining Employee	Employees of Carolina Dining Services.	1-2 years max.
Committee/Board Member	A person who is serving on a committee or board (but not the Board of Trustees).	5 years max.
EHS Associate	Affiliates who need to take Environmental, Health & Safety training and are not coming through a University department.	5 years max.
Emergency Official	External Emergency Officials who need access to the Campus Alert System.	5 years max.
Emeritus Faculty	Employees who retired from a paid faculty position in the department.	10 years max.
External Employee	Employees whose department's budget does not fall under payroll, but have a close affiliation.	5 years max.
Fellow - Unpaid	Affiliates who receive funding from an external fellowship and are working with the University.	5 years max.
Friday Center Staff	Instructors working for the Friday Center who are not paid by the University or associated with the University, except through work with the Friday Center. This means instructors from other universities that are teaching through the Friday Center and giving credit through those other universities.	5 years max.
Hospital Associate	A staff member who is paid by the hospital, but works on the University side, needing access to finance systems.	1 year max.

Affiliate Type	Description	Preferred Time Limits
Independent Contractor	<p>Someone who is not working for a company and is independently under contract with the University.</p> <p>Independent Contractor Policy: https://unc.policystat.com/policy/4756349/latest/</p> <p>Independent Contractor Checklist: https://unc.policystat.com/policy/5320607/latest/</p>	2 years max.
Intern	<p>Individuals who meet one of the following circumstances:</p> <ul style="list-style-type: none"> • Are currently enrolled at UNC-Chapel Hill or other accredited colleges, universities, community colleges or high schools and who are engaged in experiential learning in the workplace in return for academic or course credit. • Are obtaining work experience that is required for professional licensure or certification under the supervision of a licensed or certified professional (such as social workers, engineers, nurses, and accountants) for a period not to exceed 18 months in duration. • Are engaging in experiential learning in a profession under the supervision of an appropriate University supervisor or manager for a period not to exceed 18 months. <p>Intern Policy: https://unc.policystat.com/policy/4745224/latest/</p>	TBD by the Office of Human Resources, 5 years max.
Other Affiliate	<p>Rarely used.</p> <ul style="list-style-type: none"> • This is a temporary space for Leave Of Absence (LOA) students – approval is required by their respective admissions offices. • A person who does not fit into any of the other categories. 	1 year max.
Other Contractor /Consultant	A person who is employed or paid by an external company or source.	1-2 years max.

Affiliate Type	Description	Preferred Time Limits
Preceptor	A practicing professional who gives personal instruction, training, and supervision to a student or young professional. This cannot be used for individuals involved in the Medical or Dental fields.	1-2 years max.
Research Collaborator	An individual who is collaborating on UNC department or UNC faculty-driven research.	5 years max.
Retiree	A person who is retired from a paid position in the department.	10 years max.
Student - Grants PI	Current students who need finance access because they are also Principal Investigators for a grant.	1 year max.
Summer Group	A group that is only on campus for part or all of the summer, but who are not students of the University.	1 year max
UNC Trustee	A member of the UNC Board of Trustees.	TBD by the Office of the Chancellor. 5 years max.
US Environmental Protection Agency	An employee of the US Environmental Protection Agency (EPA) who is working on campus or who requires access for Institutional Review Boards (IRB) studies.	5 years max.
University Temporary Services Employee	A temporary employee working through University Targeted Staffing.	1 year max.
Visiting Scholar	<p>A person who:</p> <ul style="list-style-type: none"> • holds an appointment at another academic or research institution • is visiting to work with a particular faculty member or principal investigator on a research project • does not hold a paid appointment at UNC-Chapel Hill <p>Visiting Scholar Policy: https://unc.policystat.com/policy/4745224/latest/</p>	TBD by the Office of Human Resources, 5 years max.

Affiliate Type	Description	Preferred Time Limits
Volunteer	<p>A person who offers services without cost to the University for civic reasons and the services are not typically performed by permanent University employees.</p> <p>Volunteer Policy: https://unc.policystat.com/policy/4745224/latest/</p>	TBD by the Office of Human Resources, 2 years max.

- If you want to see affiliates for a specific department, you can select departments by doing one of the following:
 - checking the box next to the department name.
 - using the slide bar to view more department choices.
 - selecting different levels to view more department options.
 - selecting a department by department number click on **Detail Depa...** next to the Level buttons.



Results Shown on the Affiliates Report

The Affiliates Report shows the following information:.

In this column:	You see this...
Employ...	The affiliate's ID (PID) number.
Employee Name	The name of the affiliate.
Dept. ID	The affiliate's home department number.
Dept. Desc.	The affiliate's home department description.
Affiliate Status	The affiliate's status as either active or inactive.
Sponsor Name	The person responsible for the affiliate.
Aff. Type	The type of affiliate, such as a University Temp Services employee or a retiree.
Effective Date	The first day the person is considered an affiliate.
End Date	The last day of the person is considered an affiliate.

Sample of the Affiliates Report

Employ...	Employee Name	Dept. ID	Dept. Desc.	Affiliate Status	Sponsor Name
7000000x	Trainfeld, Donald William	260102	OHR-Benefits Services	Active	Trainer, Carolyn
70000001x	Trainfeld, Donald William	260100	OHR-Human Resour...	Active	McTrain, Thomas
70000002x	Trainwell, Scott	631200	FPG Child Develop...	Active	Tairners, Maya
70000004x	MacTrain, Angela	380100	SW-School of Socia...	Active	Trainmac, Benjamin

Aff. Type	Effective Date	End Date
Retiree	04/01/2015	04/01/2025
Retiree	08/08/2011	08/08/2021
Retiree	09/15/2014	09/15/2024
Preceptor	08/29/2016	08/28/2017