

ConnectCarolina

Student Originators Best Practices

Ann Sager

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



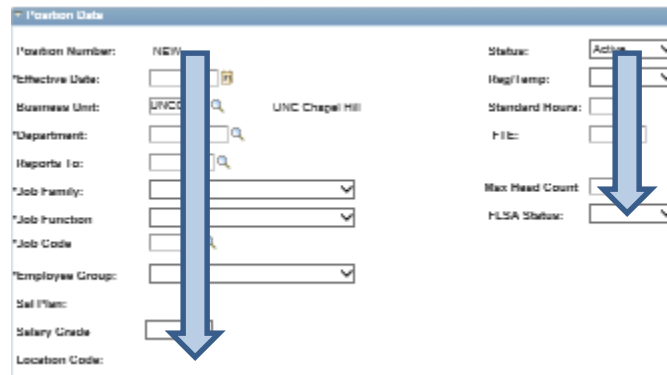
Position Overview

Ann Sager

- Overview

- Departments are responsible for creating positions
- Who needs a position?
 - ALL SHRA students
 - 1 student per position (for TIM)
 - Students with multiple jobs need multiple positions
 - Optional for EHRA students
- 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	Status:	Active
Effective Date:		Flag/Temp:	
Business Unit:	UNCS UNC Chapel Hill	Standard Hours:	
Department:		Title:	
Reports To:		Max Head Count:	
Job Family:		FLSA Status:	
Job Function:			
Job Code:			
Employee Group:			
Sal Plan:			
Salary Grade:			
Location Code:			

#2
TOP to
Bottom

- Effective Dates
 - An effective date can only be used once
 - Hire effective date must be on or after the position's effective date
- Check to make sure FTE is accurate; adjust accordingly
 - This will default based on the job code entered
- Creating positions – keep **NEW** as the action reason

- Student Originators can create new positions
- Position Updates need to be submitted by a Complex Originator
 - Reports To
 - FTE
 - Department Transfers
 - Provide Complex Originator with funding information
 - Abolish / Inactivate

- More than one person in the same position at the same time
 - Overallocated positions cause significant issues with the TIM system/interface
 - You can re-use positions; however, please terminate the incumbent before hiring the new student
 - Use Infoporte to look for position status (vacant, filled, etc.)
 - Daily Audit Report

- All employees must report to a position (Position Number) or a supervisor (Empl ID)
- **Reports To** field resides on the position and is pulled into the Hire ePAR
- **Supervisor ID** is entered on the Hire ePAR and resides on the Job record

- 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 position #)
 - Updates to Reports To are submitted via Add/Update Position ePAR (must be done by a Complex Originator)
 - If Billy Joel is NOT in a position, use Billy's Empl ID in the Supervisor ID field on Hire form
 - Updates to Supervisor ID are submitted via Edit Existing Job (Job Change) ePAR

- I created a new position effective 10/25/2017; but I just found out that the employee started working on 10/23/2017.
 - What do I do?
 - ✓ – Option 1 – submit a Help Desk ticket requesting the effective date of the position be changed to 10/23/2017
 - Option 2 – create a new position with the effective date of 10/23/2017
- I just found out that we have an SHRA student who has been working for 2 weeks.
 - What do I do?
 - Immediately start the I-9 process and add a case note in LawLogix
 - Create new position or find existing vacant position
 - Process the HIRE
 - Do the Historical Edits in TIM
 - Submit a ticket with a Payroll Exception Sheet to get those hours paid

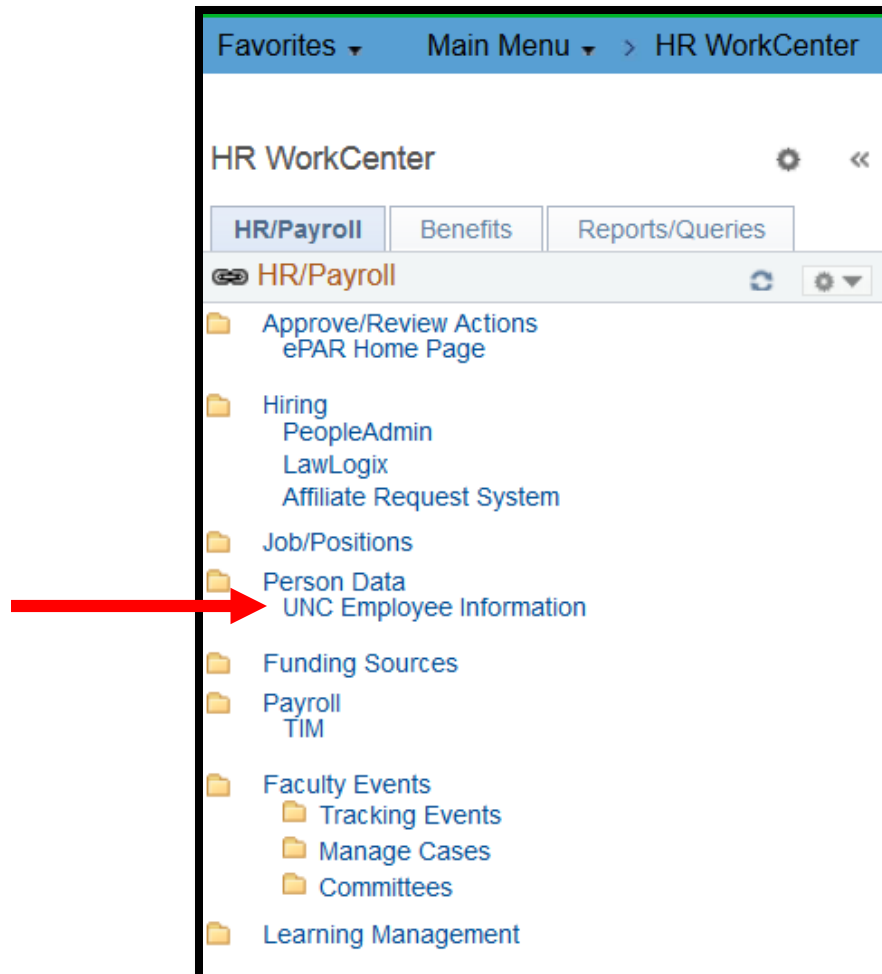


Hires / Transfers

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
- Information reflects current (not future) employment data

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:	01/01/2018
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:	01/01/2018
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
 - Refer to background check policy
- 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 calendar days
- I-9 must be completed as follows:
 - Section 1 on or before the date of hire
 - Section 2 within three business days following the hire date
- PID Creation for Minors:
 - See Recruitment and Selection forms on HR's website
 - https://hr.unc.edu/files/2016/01/Empl-ID-Request-Form-for-Employees-no-Background-Checks_12092016.pdf

Hire an Employee ePAR

- **Hire** – New employment
- **Rehire** – New employment after a break in service
- **Secondary Appointments** – Additional job
- **Transfer** - Movement from an active job to another new job/appointment
 - 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
 - Be sure to select the job the employee is transferring from
 - **CAUTION:** Coordinate with current to department to ensure smooth transition for transfers

- **WARNING:** Always search for the person by PID/Empl ID



Person Results							Personalize	Find	First	1-4 of 4	Last
		Stu	HR	Job	Act	EmplID	Record	Name	Date of Birth	National ID	
1	▶	ⓘ	☑	☑	☑		0	Student Tester2		XXX-XX-██	
2	▶	ⓘ	☑	☑	☑		1	Student Tester2		XXX-XX-██	
3	▶	ⓘ	☑	☑	☑		2	Student Tester2		XXX-XX-██	
4	▶	ⓘ	☑	☑	☐		3	Student Tester2		XXX-XX-██	

Job Information

Business Unit: SCPBH School of Public Health

Position Number:

Department: 463501 Epidemiology - Ops

Employee Group: EPA Student / Teaching Fellow

Job Code: 800170 Graduate Research Assistant

Empl Record: 0 **FTE:** 0.125000

Primary Faculty:

UNC Long Title: Graduate Research Assistant

Job Indicator: Primary

Job Family: EPA

Job Function: 005 EPA Students / Teaching Fellow

Set ID: UNCCH

Appointment End Date: 05/16/2017

[Return](#)

- **Reminder:** Advise student to update their Business Address via directory

- **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:  Set ID:

*Job Family: 

*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?

Next >>

<< Search Hold Close





Hire / Transfer – Edit Existing Job box

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?

Select the job he/she is leaving below.

Job Transferring From

	<u>Rcd</u>	<u>Job Indicator</u>	<u>FTE</u>	<u>Job Code Description</u>	<u>Department Description</u>
<input checked="" type="checkbox"/>	0	Primary Job	0.375000	Graduate Teaching Assistant	Health Policy Management - Ops
<input type="checkbox"/>	2	Secondary Job	0.125000	Graduate Research Assistant	Health Policy Management - Ops
<input type="checkbox"/>	3	Secondary Job	0.100000	Graduate Research Assistant	Health Policy Management - Ops

- Hire effective dates
 - Consider using standard hire and expected end dates (ie. semester dates)
 - If the hire date needs to be adjusted after the action has executed, submit a HELP ticket
- EHRA Student – update the FTE accordingly (defaults to zero)
- Compensation rates
 - SHRA = hourly rate
 - EHRA = monthly flat rate

Payroll website

<https://finance.unc.edu/departments/strategic-sourcing-payment/payroll/schedules/>

- Important deadline dates for New Hires, Short Work Break, Return from Work Break, and Termination actions
 - Monthly and Biweekly Schedules
 - Outlook calendar instructions

- Stipend Calculator (EHRA only)
 - We recommend using the Stipend Calculator on the Graduate School's website to determine the Flat Rate for EHRA students
 - <http://gradschool.unc.edu/funding/documents/SalaryStipendCalculatorforGradStudents.xlsx>

Name:	Steve Student
PID:	730001234
Title:	Grad Research Assistant
Start Date:	8/22/2017
Pay Through Date:	5/14/2018
Expected Job End Date:	5/15/2018
# of months of service:	8.774194
Actual Payment Amount:	5000.000000
Annualized Salary:	6838.235294
Flat rate:	569.852941

- You have submitted a Hire ePAR (which has executed) and then you find out the student started earlier than their appointment effective date
 - The student is EHRA. What do you do?
 - Submit a HELP ticket regarding the effective date change
 - Re-calculate the compensation and update it via the Edit Existing Job ePAR
 - If pay is retroactive then include a Payroll Exception Sheet in the HELP ticket; this will get passed to Payroll
 - If applicable, change the Hire Date in LawLogix and add a case note
 - Monitor the prelim check

- You have submitted a Hire ePAR for a grad student and the individual could not produce the I-9 documentation.

What do you do?

- Terminate the individual immediately
- If they worked, they must be paid for any time worked
- Once the individual provides documents which reflect they are authorized to work, a new Hire ePAR may be submitted

- You need to hire an EHRA student for the Fall (effective 8/17) and you see they have an active SHRA Student job with an expected end date of 8/17 in another department. What do you do?
 - Consult with the student and the department
 - Does the department plan to extend the appointment?
 - If not, communicate you will transfer them out of the SHRA job
 - check the Edit Existing Job box on the Hire ePAR
 - If so, submit the Hire as a secondary job
 - do not check Edit Existing Job box



Edit Existing Job (Job Change) and Short Work Breaks

Alex Smith

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

- 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 (may need to add, update or remove) the Action and Action Reason values to reflect the information entered on the ePAR

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

- SHRA Students
 - Data Change / Expected End Date Change

- 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 Record only
 - Intended to cover semester or summer breaks

- Submit an Edit Existing Job (Job Change) ePAR
 - Update FTE
 - Update Expected Job End Date
 - Compensation/Funding: no need to edit or change
 - Action / Action Reason
 - Short Work Break / EHRA Short Work Break

- **Return from Work Break / EHRA Student Reappointment** is required to restart pay on the Empl Record
 - Reappointment to the same job
- Submit an Edit Existing Job ePAR
 - Update FTE
 - Update Expected Job End Date
 - Always review compensation and funding!
 - Warning: leave box unchecked to review comp and funding

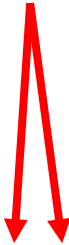
I do not wish to update compensation/funding on this action.

- Job Change / Reappointment or Hire/Transfer **will not** change payroll status
 - Hire/Transfer of someone on SWB is a two step process

- 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	+	-

- **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
 - Pay Rate Change Action should always be used when pay is updated
 - Always change the Action first (left) and then select the Action Reason (right)
 - Invalid combinations will cause the ePAR to get stuck

Actions & Action Reasons						
	Action Code	Action Description	Reason Code	Action Reason Description		
1	JRC	Job Change	RAP	Reappointment	+	-

Action & Action Reasons						
	Action Code	Action Description	Reason Code	Action Reason Description		
1	DTA	Data Change	RAP			

- An EHRA student needs to have their Job Code updated. What form do you use?
 - Edit Existing Job/Job Change can update Job Codes*
 - *Movement from a Non-GradStar (ie Grad Assistant) to a GradStar (Grad Research Assistant) job code will not be picked up from Job Change – must use Hire/Transfer
- You get a request from a supervisor that an employee was hired into the wrong department. How do you fix that?
 - SHRA student: Process a Position Update (Complex Initiator)
 - EHRA student: Dept change must be done with Hire/Transfer
- You want to hire an SHRA student but you get a warning that their FTE is greater than 1.0. What can you do?
 - Reach out to the Dept(s) of the current job(s) to see if FTE reduction is possible. If so coordinate effective dates and FTE reduction amount.



Expected End Date and Terminations

Alex Smith

- 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 = 1/1/2018

Graduate Student is hired for the full year EED = 5/14/2018

Undergraduate Student is hired for the month of October EED = 11/1/2017

Graduate Student will be on work break in the fall, return in the spring EED = 1/1/2018

- SHRA Students will automatically be terminated once they reach their expected job end date
- Auto-term process is run every morning, prior to office hours
 - Will not terminate anyone with an ePAR in progress or during payroll lockout
 - If they are going to continue, process an Edit Existing Job 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 – not currently auto termed
 - Departments must monitor the Expected End Date Report (Infoporte) and process actions (short work break, 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! 
- Beginning January 2018, any EHRA Student with an Expected End Date in or before the current month will be auto termed
 - Will occur the 15th of every month prior to office hours
 - Will not auto term any employee with a Hire, Job Change, or Status Change action in progress or in Payroll lockout
 - Will not auto term Fellow Trainees (Jobcode 800171)

- Effective Date
 - The date when the termination begins, not the last day worked
 - Example: If I am resigning effective the end of the calendar year
 - Termination Effective date is 1/1/2018
 - 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
 - Using the example above:
 - If the Expected Job End Date (EED) is 12/31/2017, then the Term date cannot be 1/1/2018
 - You would need to submit a JOBCHANGE to extend the EED to 1/1/2018, then process the termination
 - If you enter a termination for 12/31/2017 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

- A student is inadvertently hired twice (emp rec 0 and emp rec 1) into the same EHRA student job eff 9/1/17. What is the proper protocol to fix this?
 - Submit a Help ticket
 - Duplicate will either be backed out, or you may have to submit a termination with a 9/1/17 effective date.
 - If overpaid, the ticket will be passed to Payroll to process over-payment
- You find out that an SHRA student in your dept is going to continue to work over the summer, but they were auto-terminated on 5/14/17. How do you fix this?
 - Submit a Help ticket to back out the termination (Do not Rehire into the same job)
 - Job Change ePAR to update the Expected End Date (start it that day to avoid auto-termination again)



Additional Information

Ann Sager

- What is a retroactive transaction?
 - Any action where the effective date is earlier than today's date
 - Any action that executes after the effective date
- Which ones need special attention?
 - #1 – New Hire action which executes after payroll lockout for that period
 - Example M04 payroll lockout was 10/23/2017 at noon
 - Pay Period covered was 10/1/2017 through 10/31/2017
 - On 10/24/2017, you enter a transaction for a new hire effective 10/15/2017
 - » This person missed the October payroll, their first payroll will be November
 - » Retro pay does NOT automatically kick-in for them and the student will be underpaid for the 17 days of October (10/15/2017-10/31/2017)
 - **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

#2

- Student on Short Work Break & returned AFTER that payroll
 - Example M01 payroll lockout was 07/23/2017 at noon
 - Period covered was 7/1/2017 through 7/31/2017
 - Student has been on Short Work Break since 5/16/2017
 - On 7/22/2017, you enter a Return from Work Break effective 7/15/2017
 - 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 (7/15/2017-7/31/2017)
 - **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

#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 7/21/2017 at noon
 - Period covered was 7/1/2017 through 7/31/2017
 - On 7/22/2017, you enter a new hire effective 7/15/2017 (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 (7/15/2017-7/31/2017) for empl_rcd 1
 - **You must submit a Help Desk Ticket so we can ensure that retro pay will be generated**

#4

- Student placed on Short Work Break or Terminated **AFTER** the payroll deadline
 - Example M11 payroll lockout was 05/23/2017 at noon
 - In June, Student placed on Short Work Break back to 5/16/2017
 - Student was paid for 5/1 – 5/31
 - Student was overpaid for 16 days
 - Retro pay (negative) will NOT automatically kick-in
 - **You must submit a Help Desk Ticket so Payroll can ensure that a dock in pay or the overpayment process will occur**
 - Payroll Exception Sheet is required

- Any effective date for a previous payroll where the person was not paid on that previous payroll for that empl_rcd and pay group, retro pay will NOT pick up the transaction
 - EHRA → SHRA transfer retroactively – SUBMIT A TICKET
 - SHRA → EHRA transfer retroactively – SUBMIT A TICKET
 - EHRA student with a new secondary job (retroactively) – SUBMIT A TICKET
 - Overpayment will not automatically be picked up by payroll - SUBMIT A TICKET and Payroll Exception Sheet
- Actions must have executed prior to Payroll intervention
- If you're not sure what to do, contact the HELP desk

- 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 6/1/2017
- Then you change the TIM Approver 8/1/2017
- Now you find out that there should have had a pay increase effective 7/1/2017

8/1/2017 – TIM Approver change

6/1/2017 – New Hire

7/1/2017 – 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!



- Scenario: Student is placed on SWB and then needs a supervisor change
 - Use the date the supervisor change occurred or the date student went on Short Work Break, whichever is later
 - May also wait for Return from Work Break / Reappointment
- Expected End Date Change
 - Do not need to go back to initial hire date
- Prevent mid-stacks by:
 - Avoid future dated actions, when possible
 - Submit actions in a timely manner

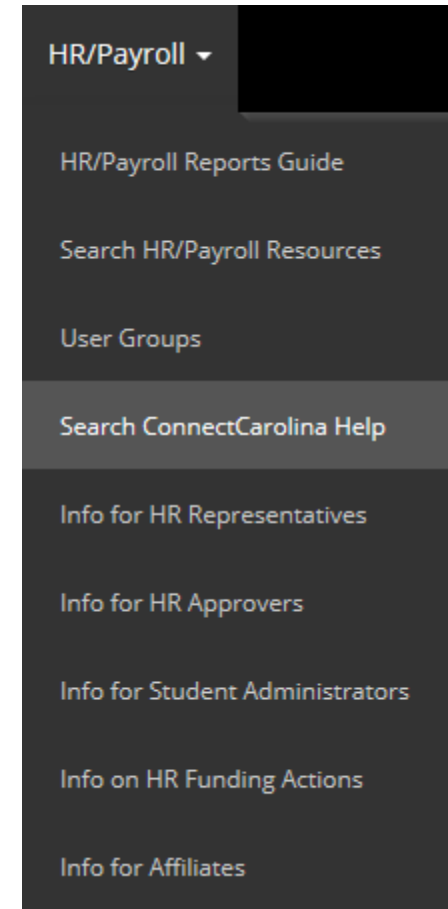
- Do NOT use the Edit Existing Job ePAR (JOBCHANGE) to change funding – use the FUNDSWAP ePAR
 - They clutter the job history
 - We will withdraw them if we see them 😞

- **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) contact the Help Desk
- 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

- 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

- <http://ccinfo.unc.edu/>
 - One-stop shop for all your Connect Carolina needs
 - Outages/Announcements
 - Previous User Group Slides
 - Training guides and User Manuals (Onyen Auth)
 - [Student Originators Guide](#)
 - [HR Advanced Class](#)
 - Don't forget HR/Payroll Reports Guide under the Reporting Tab



- Resources
 - User Group Meetings
 - ConnectCarolina HR/Payroll Update communications
- <http://help.unc.edu/> or 962-HELP(4357) Ext 3 (Bus Sys Help)
 - Technical help or to Create Remedy Tickets for assistance
 - As needed requests are escalated to Business Analysts
 - We are here to help. Please ask first
- Student Originators Best Practices Meeting
 - All Student Originators should have received an invite
 - Be sure to enroll in the class to make sure you will have a seat
 - 3-4:30 on Monday Nov 6
- Contact: connectcarolina_training@unc.edu

- Protection of Minors policy
 - <http://policies.unc.edu/policies/protection-of-minors/>
- PID Creation for Minors
 - https://hr.unc.edu/files/2016/01/Empl-ID-Request-Form-for-Employees-no-Background-Checks_12092016.pdf
- Payroll calendars with payroll and HR deadlines
 - <https://finance.unc.edu/departments/strategic-sourcing-payment/payroll/schedules/>
- Stipend Calculator
 - <http://gradschool.unc.edu/funding/documents/SalaryStipendCalculatorforGradStudents.xlsx>

- Tips for Searching for ePARs reference document
 - <https://ccinfo.unc.edu/files/2016/01/Tips-for-Searching-for-ePARs1.pdf>
- Quick Reference for SHRA Student Summer Employment
 - <https://ccinfo.unc.edu/resource-docs/shra-student-summer-employment/>



Questions?



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.

▼ 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 ▼	<div style="border: 2px solid red; padding: 5px;"><ul style="list-style-type: none">AuthorizedDeniedExecutedIn ErrorOn HoldPartially ApprovedPendingSignedWithdrawn</div>
Original Operator:	begins with ▼	<input type="text"/>

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	<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:	between	<input type="text" value="10/01/2015"/> and <input type="text" value="10/31/2015"/>
Workflow Form Type:	begins with	<input type="text"/>
Workflow Form Status:	=	<input type="text"/>
Original Operator:	begins with	<input type="text"/>

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.

▼ 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.

▼ 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 ▼	30%
Job Family:	begins with ▼	EPA
Employee Group:	= ▼	<input type="text"/>
Action Date:	between ▼	10/01/2015 <input type="text"/>
		and
		10/31/2015 <input type="text"/>
Workflow Form Type:	begins with ▼	<input type="text"/>
Workflow Form Status:	in ▼	<ul style="list-style-type: none">AuthorizedDeniedExecutedIn ErrorOn HoldPartially ApprovedPendingSignedWithdrawn
Original Operator:	begins with ▼	<input type="text"/>

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

 Save [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: ▼

Workflow Form Type: ▼

Workflow Form Status: ▼

Original Operator: ▼

Case Sensitive



Questions?