Arts & Sciences Managers' Meeting Minutes

November 20, 2014

Speakers

Ashante Diallo
Associate Director, Human Resources

Laura Yurco
Assistant Dean, Finance

Matt Hughes
Administrative Assistant

HR Announcements

Central Office Staffing Changes
Mike Mathews – Interim Director of Academic Personnel (formerly Gwen Burston)
May Offutt – HR Consultant, APT (formerly Susan Walters)

Revised Forms
Updated FY14-15 SPA and EPA Salary Adjustment/Supplement Form (revised 11/6/2014) - Please be sure that you are using the correct form.

Updated Conditions of Employment (related to travel and Ebola)

- Faculty: http://academicpersonnel.unc.edu/faculty-related-forms/faculty-personnel-forms/
- EPA Non-Faculty: http://hr.unc.edu/form-finder/epa-non-faculty-forms/
- SPA: http://hr.unc.edu/form-finder/employment-forms/

Electronic Background Check

- Request Form Departments may use electronic process or paper form through December 30, 2014.
- Background check policy has also been updated.

Dates/Deadlines

- November 12th at 5pm - campus data entry deadline for M05 must be strictly enforced. Any actions not entered by that deadline will be denied by Central Office approvers, and originators will not be able to recycle that action for later use. This requirement is necessary to ensure correct compensation based upon annual salary increases processed on the upcoming ARP.

  Actions other than job change, lump sum payment, and FTE changes in support of the ARP for the December monthly payroll will be limited to new hire, termination, and leave processing.

- November 30th – Legacy HR Systems close for view access. **This date was later extended to December 9th.**

- December 9th – Deadline for dossiers for promotions to associate or full professor to reach the Dean's Office for a July 1, 2015 effective date.

Finance Announcements

ARP

- ARP Sheets are due November 14th at Noon

Budget Lines

- Please clean up your budget lines, even though you are not receiving errors this affects everyone in the College. We want to be sure there is enough budget in each account code to be able to continue to spend.

ConnectCarolina Tips and Tricks

Snipping Tool

- You may use the Snipping Tool on Windows machines to take screen grabs when you are having issues and need help troubleshooting.
- Alternatively you can use the screen shot or screen clipper functions available in both Microsoft Word and Outlook.

How to Read Declined/Recycled Actions Comments (see attached directions)

- You will receive an email.
- Either click on the link in the email or to go your ConnectCarolina Worklist to find the transaction.
- Choose the denied transaction, this will open up the routing window.
- Click on View/Hide Comments on the top right or Comments at the bottom.
- This will open up the comments and the reason for denial.
- Either add comments here or if you need to make changes you will have to find the transaction from the "find existing" tab for that type of transaction. After corrections are made you will have the option to resubmit the transaction for approval.

Adding attachments and/or explanations to actions

- When you submit a financial transaction that routes for approval (ie: budget, complex journal entries, source create) please add attachments and/ or detailed notes explaining what you are trying to accomplish.
- Please take a screen shot and/or send a detailed explanation attached to the action, such as old FRS account numbers, complete descriptive information, and screenshots. This will save approvers time instead of them having to rebuild your situation.

Budget Overview (see attached directions)

- You may run a budgets overview inquiry for all budgets within a ledger group or selected budgets, using chartfield ranges or specific values, within a ledger group.
- This information is useful for planning budgets, monitoring your expenditures, and resolving any budget check exceptions.
- You can find the budget overview inquiry by clicking Main Menu > Finance Menu > Commitment Control > Review Budget Activities > Budget

Overview

ConnectCarolina Update

<u>Encumbrances (see attached email)</u>

- Encumbrances posted on November 11, 2014.
- Beginning with Payrolls paid in November 2014, the Commitment Accounting processes will include salary and benefits encumbrance liquidations and updates.

UPDATE: There are some issues with encumbrances being for the period through the end of the fiscal year (non-OSR sources) or project end date (OSR grants) even if job end date is earlier. They are working on a systematic way to fix this but going forward we will need to add funding end date to all actions for employees with an earlier than fiscal year end date or project end date.

<u>Retroactive Funding Swaps in ConnectCarolina</u>

Instructions on retroactive funding swaps will be sent out via email. However, we recommend on holding off on them until January due to ARP.

<u>Suspense (see attached email)</u>

- Working on solutions for retro FTE corrections.
- There is testing being done, but it may be some time with ARP around the corner.
- The reasons why transactions have posted to suspense include: funding end date; inactivated combo code; and exceeds budget in the Department Budget Table.
- If a funding source has a funding end date that has passed, the payroll expenses will not post to the research grant. Instead, the payroll expenses will post to departmental suspense Chartfields.
- Departments should monitor project end dates on sponsored awards and funding end dates on non-OSR funds, and then move the portion of the employee's salary to a new source of funds before the next payroll is distribute.
- To make a correction for suspended payroll transactions: initiate a transaction by submitting a Funding Swap ePAR with the appropriate effective date. Customized functionality will be used for legacy payroll transactions for the 15 months period ended September 30, 2014.

<u>Post Go-Live Training</u>

- Central training will be providing training in November and December for an assortment of functions within ConnectCarolina and Infoporte. To check the classes being offered by Central Training, please visit www.ccinfo.unc.edu/calendar.

- To enroll in these classes, please email Anita Collins (anita_collins@unc.edu) and copy Collette Wilshire or Laura Yurco. For Human Resources, you may contact Anita directly (a copy to Lachonya Williams is not required).

Requesting Access to Infoporte and/or ConnectCarolina (see attached document)

- Access forms for access to Infoporte or ConnectCarolina can be found under Tools > Data Dictionary > General Info in Infoporte.
- There is one general form for Infoporte access to Finance and Human Resources.
- There are separate forms for ConnectCarolina access to both Finance and Student Administration records.
- Human Resources access to ConnectCarolina, LawLogix, and PeopleAdmin must be performed by completing the HR System Access Form.
- All other requests are performed by submitted the General ConnectCarolina form.
- To submit the form, please use the appropriate Human Resources or Finance routes in Infoporte pertaining to Infoporte or ConnectCarolina access requests. Student Administration requests may be submitted via the Finance routes for now.