

Arts & Sciences Managers' Meeting Minutes

September 2, 2015

Speakers

Lachonya Williams
Assistant Dean, Human Resources

Ashante Diallo
Associate Director, Human Resources

Mark Richardson
Department Manager, Departments of American Studies and English Language and Comparative Literature

Laura Yurco
Assistant Dean, Finance

Jocelyn Brooks
Staff Development Specialist

HR Announcements

Updated ASAC Schedule (handout is attached at the end of these minutes):

- Memo on mandatory reviews to be sent soon.
- Find video on routing dossiers and a dossier checklist on the intranet:
 - <https://collegeintranet.web.unc.edu/faculty-dossier-routing/>
 - Contact Jocelyn Brooks (Jocelyn_brooks@unc.edu) for Infoporte assistance

Background Check Phase II:

Electronic background checks will be initiated at the school/division level by the HR Specialist.

- CAS expected to go-live next month, once users are trained.
- Limited number of access points for processing.
- Changing process and form; more information to come.
- Includes all background check types – volunteer/intern, visiting scholar, employee, independent contractor.

Tax Withholding Status email:

Email dated August 28, 2015 - Tax Withholding Status for University **Employees Working Outside the State of North Carolina** has caused some confusion and raised some questions. Brian Simet (Interim Payroll Director) has been informed. We are awaiting clarification.

ConnectCarolina Deadlines:

There's a new deadline for schools and divisions. Items that do not reach the Dean's Office for approval at least two business days before the deadline run the risk of missing the approval for the pay cycle. We will try to move things forward as quickly as possible, but will not compromise internal review and approval procedures to do so.

Benefits Update:

As previously communicated in an email dated August 31, 2015, the State Health Plan's Enrollment and Eligibility platform has experienced performance issues since it was rolled out on June 1, 2015, and as a result, the Plan has decided to return to the previous system provider, Benefit Focus.

This transition will begin at 5 p.m. **Monday, August 31, and will continue through Tuesday, Sept. 15.** During this period, the system will be unavailable to all employees. This means that any new employee who needs to make an enrollment election or an existing employee who experiences a life event will have to wait until Sept. 15 to enroll or make system changes. Furthermore, the State Health Plan's call center will only be handling urgent issues during this period.

If an urgent matter arises and needs to be handled during this period, please contact Benefits Services at **919-962-3071**.

GRC Payments:

Graduate Research Consultant Payments (via OUR) will be processed by the Business Center. Please await further communication and instructions from Collette Wilshire and/or Ashante Diallo. Disregard any instructions that you may have received from Krista Perreira.

Summer School Paychecks:

Although Summer School payroll ran relatively smoothly in the new system, there were some difficulties with student social security withholdings, thereby reducing students' paychecks. Payroll and Summer School staff have identified the students who should have been exempt from FICA taxes, and Payroll is planning to process a special refund check for affected students. **This paper check will be distributed on September 11th.** Any departments with checks that need to be picked up from the Payroll office will be notified directly by Payroll Services.

New job codes for summer school will include Summer Teaching Assistant, Summer Instructional Assistant and (possibly) Summer Teaching Fellow, to ensure that FICA exemption is properly handled. We will follow up on the Summer Teaching Fellow job code, when more information is available.

ConnectCarolina User Conference:

User Conference is a free, one-day event that provides an opportunity for users to learn how to get the most out of ConnectCarolina and InfoPorte. Go to the [User Conference page](#) to sign up for a reminder when conference registration opens.

The College is represented by Octavia Bullard, Lead HR Specialist and Miranda McCraw, HR Specialist in the Business Center. We are looking for volunteers to represent the College and co-facilitate a workshop. The workshop will be

approximately 45 minutes in duration and the topic presented will be our choice. We are asking that any Manager that would like to volunteer to facilitate a workshop and anyone that has suggestions for topics to email Lachonya Williams no later than Friday, September 11th by close of business.

Expected End Dates:

It is imperative that all termination and reappointment actions are initiated prior to the expected date of an appointment because pay does not end on that date. It is also important that the effective date of the new action is the **SAME** as the expected end date. In the case that these differ, the actions will get stuck and need manual intervention. In addition, the days in between the expected end date and the new effective date, the employee will continue to get paid. Over payment continues to be an issue and requires a lot of human labor to correct and collect. For example, if a student has an expected end date of 8/1/2015 and the reappointment is effective 8/17/2015, the student will get paid from the 1st - 16th and the reappointment action will get stuck and need manual intervention.

Guest IDs for Terminated Employees:

Campus will implement a workflow scheduled to go live at the end of October where terminated employees can request a guest ID that will allow them to access the Self Service section of ConnectCarolina. This will be a process that has to be initiated by the employee after the date of termination. Access to Self Service will allow the individual to access pay stubs and W-2 forms.

Manual Paychecks:

Payroll Services is developing a form and process for requesting manual paychecks for employees in exceptional situations. The form and policy will be available on the Finance Division website, once it is implemented. Users will attach the form to a help ticket. Help tickets for manual checks should **not** be marked as critical. Additional information will be provided closer to the effective date of the policy.

Onyen Generation:

The ConnectCarolina team is working on a solution for delayed onyen generation for new hires. The proposed solution may allow the PID to become active once the hire epar has passed Level 2 approval. **This solution has not been vetted by campus stakeholders at this time.** However, the team hears your concerns about delays in PID activation/onyen generation, and they are working towards a solution.

In the meantime, a workaround for non-resident alien faculty is that you can add a secondary non-compensation job to the employee and allow that action to fully execute to activate the PID.

Self-Service W-2, W-4 and NC-4:

Later this fall, Payroll Services plans to implement electronic access to the W-2 form. Employees will also be able to update their tax information on the NC-4

and W-4 forms using the Self-Service tab. More information will be forthcoming as implementation nears.

Updating CAS EPA Recruitment Request Form:

After Mark Richardson's demo, see below, we received feedback that our recruitment forms need to be updated to include a place to use the online letters of recommendation function in PeopleAdmin. AMAC and Ashante Diallo are working to implement changes.

Letters of Recommendation during Faculty Searches – Mark Richardson

Using PeopleAdmin for Letters of Recommendation:

- There's a better way of receiving letters of recommendation, rather than receiving them by email or mail and PeopleAdmin has a way of electronically receiving letters of recommendation.
- As part of the PeopleAdmin posting, letters of recommendation may be added to the faculty application.
- The posting can be set to request a reference letter at particular point during the application process, such as when the candidate is under review, as well as the number of letters required.
- EEO can fix issues regarding reference letters, including when references letters need to be attached to a candidate's application after a deadline has lapsed, or if the recommender has any difficulty uploading a letter into the system.
- See the attached information regarding the process for letters of recommendation at the end of these minutes.

Finance Announcements

Dean's Office Commitments Transferred for FY16:

The Dean's Office has transferred the FY16 commitments to the departments. Please refer to the attached chart at the end of these minutes for details and information on the few outstanding items.

Please follow the steps below to pull a report of commitments that we have transferred, including your departmental chartfield string where funds were deposited:

1. Click on the link: <https://asr.oasis.unc.edu/>
2. Click "Sign On"
3. Login with your ONYEN
4. Under Financial Reports choose "Commitment Transfers"
5. Choose Fiscal Year 15/16, choose your Department then click "View Report"
6. This page shows the Commitment Transfers for the Fiscal Year 15/16. It is divided by Commitment number and shows the chartfield strings used for the transfer and the amount transferred.

After running your commitment report, if you have any questions or concerns please contact Sabrina Flowers for Fine Arts & Humanities, Undergraduate

Education, and Natural Sciences; and Wendy Riley for Social Sciences and Global Programs.

**Budget Overview
Snapshot –
Jocelyn Brooks**

Infoporte and Your Budget:

- Fiscal year refers to an accounting year or a budget period used to calculate financial statements.
- Infoporte also uses fiscal years the date an entry is posted and considers budget year as the year that a budget entry will be spent.
- In the Infoporte filters, you must designate the fiscal year *and* the budget period. For current year, the fiscal year can be 2015 or 2016 and the budget period is 2016. In future years, these years will be the same.
- Infoporte uses budget indicators and these are included in the attachment on budgets at the end of these minutes.
- If a reversal is listed in Infoporte that means your department was given a budget that was taken away, but then returned to your department.

College of Arts & Sciences



Tenure Track Review Schedule 2015-2016 Committee Schedules and Deadlines for EPA Personnel Actions

ASAC SCHEDULE

Deadline to Submit Dossiers for	CAS Submittal Deadline	ASAC	Provost	APT Sub-Committee	APT	BOT
	None	No Meeting	07-06-15	08-07-15	08-13-14	(08-27-14)
	None	No Meeting	07-27-15	08-26-15	09-02-15	10-01-15
	None	No Meeting	08-31-15	09-30-15	10-07-15	10-22-15
	08-11-15	09-10-15	09-28-15	10-28-15	11-04-15	11-19-15
	09-08-15	10-13-15	10-26-15	11-25-15	12-02-15	(12-17-15)
	10-13-15	11-10-15	11-23-15	01-07-16	01-13-16	01-28-16
	11-10-15	12-01-15	01-04-16	02-03-16	02-10-16	(2-25-16)
July 1 Promotion to Assoc or Full →	12-08-15	01-12-16*	02-01-16	03-02-16	03-09-16	03-24-16
July 1 Asst Prof Reappointments →	01-12-16	02-09-16*	03-07-16	04-06-16	04-13-16	(04-21-16)
	02-09-16	03-02-16*	04-04-16	05-04-16	05-11-16	05-19-15
July 1 New Hires →	03-02-16	04-13-16*	05-02-16	06-01-15	06-08-16	(06-23-16)
Jan 1 New Hires, Reappts, & Promotions →	04-13-16	05-11-16*	06-06-16	07-06-16	07-13-16	07-21-16
	None	No Meeting	07-06-16	08-05-16	08-12-16	(08-27-16)
	None	No Meeting	08-03-16	09-02-16	09-09-16	09-23-16
	None	No Meeting	09-01-16	09-30-16	10-07-16	(10-22-16)
	08-11-16	09-06-16	09-28-16	10-28-16	11-04-16	11-18-16
	09-06-16	10-12-16	10-26-16	11-25-16	12-02-16	(12-16-16)
	10-13-16	11-08-16	11-23-15	12-29-16	01-06-17	01-20-17

Departments must submit dossiers by the deadlines listed above. Please submit dossiers when ready even if early. To request an exception to a deadline, departments should contact their Senior Associate Dean.

BOT dates in parentheses indicate meetings not regularly scheduled in which a mail ballot is used.

*Tentative –Due to varying teaching and administrative schedules, ASAC meeting dates may need to be adjusted. This will not change submission deadlines. Dates highlighted in yellow are tentative.

PEOPLEADMIN LETTER OF RECOMMENDATION FUNCTIONALITY

PA will collect recommendation letters *directly* from the recommenders who are identified by an applicant when he or she applies to a position.

HOW DOES THIS WORK?

- When the HR Specialist creates the posting, he or she will have to...

1. Indicate that the posting will accept online letters of recommendation

Applicant Workflow

Workflow State

When an application is submitted for this job, it should move to which state in the Candidate Process workflow?

References

Reference Notification

Request References to submit Recommendations when candidate reaches selected workflow state?

Recommendation Workflow

When all Recommendations have been provided, move to selected workflow state?

Recommendation Document Type

Allow a document upload when a reference provider submits a Recommendation?

Online Applications

Accept online applications?

Special offline application instructions

Accepted Application Forms

Faculty Application (With Reference Letter)

2. *Provide information and instructions regarding the LOR functionality to the applicant and the recommender.*

- Instructions to the candidate go in the “special instructions” section.

Posting Information

Number of Posting Days	30
Posting Open Date	10/28/2014
Posting Close Date	12/31/2014
Open Until Filled	No
Number of Requisitions associated with this recruitment	1
Special Instructions	<p>Applicants must apply online at http://unc.peopleadmin.com/postings/61865 by 5:00 p.m. on December 21, 2014 and submit a cover letter, CV, statement of teaching philosophy, and a writing sample demonstrating his or her research.</p> <p>At the time of application candidates will also be required to identify the names, titles, and email addresses of professional references (four are required). References must be at level of tenure-track assistant professor or higher. Recommenders identified by the applicant will be contacted via email with instructions for uploading their letters of support. These letters must be received by December 31, 2014. Alternatively, applicants may list Interfolio as a reference and the application system will solicit recommendations directly from Interfolio. Please see http://help.interfolio.com/entries/24062742-Uploading-Letters-to-an-Online-Application-System for instructions.</p> <p>Questions regarding the position should be directed to Professor Marcie Cohen Ferris, Search Committee Chair, Department of American Studies, CB #3520, University of North Carolina, Chapel Hill, NC, 27599-3520, ferrism@email.unc.edu.</p>
Special Physical and Mental Requirements	
Stimulus/ARRA Funded	No
Quick Link	http://unc.peopleadmin.com/postings/61865

- Instructions to the reference provider go in the “special instructions to the reference provider” section.
 - In this section you indicate the minimum and maximum number of references that will be accepted, as well as the last date that recommenders can upload their letters.
 - The last date for recommendation letters can be the same date as the posting closing date, or later.

✔ Reference Requests

Reference Request Details

Require applicants to submit references for this position?	Yes
Minimum number of references	4
Maximum number of references	4
Last day for recommendation	01/04/2015
Special Instructions to Reference Provider	<p>All recommendation letters must be uploaded into the recruitment system by December 31, 2014 (letters sent directly to the department via email or post will not be uploaded). All letters must also be signed and on institutional letterhead.</p> <p>If you experience any problems accessing the applicant system or have questions about the process of uploading a letter of recommendation, please contact the University's Equal Employment Opportunity Office at (919) 966-3576 or send an email to equalopportunity@unc.edu.</p>

When the candidate submits their application, PA will automatically send an email message to each reference provider to let them know that they have been identified as a recommender for applicant X, who has applied for position Y. That email will contain a secure link that recommenders will follow to upload their letter directly into PeopleAdmin.

WHY USE THIS FEATURE?

- All applicant materials are in one place.
 - All search committee members and those with HR/PA access in your department will be able to see the LOR's in the system.
 - Letters can be downloaded and reviewed individually, or as part of the merged full dossier PDF.
 - You don't have to create a Sakai site or use other resources to store LOR's.
- It significantly cuts down on department involvement in the LOR process. You don't have to upload scores (or hundreds!) of individual letters to a secondary source (Sakai project site, etc.).
 - EEO "owns" the LOR upload process. If recommenders have issues uploading their letter, they work with EEO directly to resolve the issue.
 - If a recommender emails the department their letter instead of uploading it themselves (which occasionally happens), the recommender or department can email EEO and ask them to upload the letter.

WHAT ABOUT LOR SERVICES WHO COLLECT LETTERS FOR APPLICANTS AND THEN SEND THOSE LETTERS TO SCHOOLS AND EMPLOYERS WHEN PROMPTED BY THE APPLICANT?

- I can only speak for the LOR service that candidates have used in the past in my two units – Interfolio.
- We provide instructions for soliciting letters from a reference letter service in the "special instructions" to the candidate section.
 - Example: At the time of application candidates will also be required to identify the names, titles, and email addresses of professional references (four are required). The recommended candidates identified will be contacted via email with instructions for uploading their recommendation letters. *Alternatively, applicants may list Interfolio as a reference and the application system will solicit recommendations directly from Interfolio. Please see <http://help.interfolio.com/entries/24062742-Uploading-Letters-to-an-Online-Application-System> for instructions.*
 - See handout.

WHAT POSITION TYPES CURRENTLY CAN USE THE ONLINE LETTER OF RECOMMENDATION FUNCTIONALITY?

- As best I'm aware right now only EPA Faculty postings (temp and perm) can utilize the LOR collection feature in PA. The feature has not yet been turned on for other position types.

Dean's Office Allocation Status

✓ **Complete transfers:**

Type of Transfer	Source	Account	Program	Budget Journal #	Budget Transfer #
Trust Commitment Allocations	UXXXX, CXXXX, 7XXXX, or 5XXXX	500100	Varies	0000104208	
Professorship Salary Allocations					
Salary	UXXXX, CXXXX or 7XXXX	510000	10005	0000104338	
Benefits	UXXXX, CXXXX or 7XXXX	500100	10005	0000104338	
Professorship Research Allocations	UXXXX, CXXXX or 7XXXX	500100	C3XXX	0000104381	
New Hire Faculty Salary Funds	12001	513100	10000		0000102167
End of Employment Faculty Salary Funds Reversion	12001	513100	10000		0000101655
F&A Movement of Budget to Program	14101	500100	10000	0000101190	
State Commitment Allocations	12001	Varies	Varies		0000105702
Instructional Budget Carryover	12001	513100	C1302		0000107180

▪ **Transfers Pending Approvals:**

Type of Transfer	Source	Account	Program	Budget Journal #	Budget Transfer #
Trust Commitment Carryover	UXXXX, CXXXX, 7XXXX, or 5XXXX	500100	Varies	0000105770	
Leadership Allocations	C5XXX	500100	C1306	0000106049	
Leadership Carryover	C5XXX	500100	C1306	0000106105	

➤ **Forthcoming Transfers (expected by September 15th)**

Type of Transfer	Source	Account	Program	Budget Journal #	Budget Transfer #
E&T Budgets					
Salary	14295	510000	C1306	Pending	
Benefits/NonPersonnel	14295	500100	C1306	Pending	
Faculty Salary Increase Funds (ie: Promotion)	12001	513100 or 511100	10000		Pending
F&A Commitment Allocations	14101	500100	Varies		Pending* +Chartfield string details available in ASR Report
3% Instructional Budget Reversion	12001	513100	C1302/C1303		Pending

To see commitment details navigate to Arts and Sciences Reporting:

<https://asr.oasis.unc.edu>

Click: Commitment Transfers

Choose: Fiscal Year: 2015/2016

Click: View Report

INFOPORTE AND YOUR BUDGET

Fiscal year

A fiscal year refers to an accounting year or a budget period used to calculate financial statements.

Infoporte also uses fiscal year as the date an entry is posted (The accounting date).

Infoporte considers budget year as the year that a budget entry will be spent.

Infoporte Filters

STATE BUDGETS	FISCAL YEAR	BUDGET PERIOD
CURRENT YEAR	2015, 2016	2016
FUTURE YEAR	2017	2017
PAST YEAR	2015	2015

Permanent State expense budget indicator = RBS0000001

Permanent State revenue budget indicator = RBSR000001

Infoporte Filters

F&A BUDGETS	FISCAL YEAR	BUDGET PERIOD
CURRENT YEAR	2015, 2016	2016
FUTURE YEAR	2017	2017
PAST YEAR	2015	2015

Permanent F&A budget indicator = FAFIX(reversed) = 500100

Permanent F&A budget indicator = 500100 All Other Expenses line

Formula allocation = FORM16, included in the 500100 All Other Expenses line

Carryforward = 0000089429 & 0000089432, included in the 500100 All Other Expenses line

Connect Carolina shows formula allocation on a non-recurring basis

Infoporte Filters

TRUST BUDGETS	FISCAL YEAR	BUDGET PERIOD
CURRENT YEAR	2015, 2016	2016
FUTURE YEAR	2017	2017
PAST YEAR	2015	2015

If an associated budget, Carryforward = TRROL00001