Affiliates

College of Arts & Sciences
Business Operations
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is an Affiliate?</td>
<td>2</td>
</tr>
<tr>
<td>Affiliate Access</td>
<td>2</td>
</tr>
<tr>
<td>Affiliate Approval</td>
<td>2</td>
</tr>
<tr>
<td>Affiliate Types</td>
<td>3</td>
</tr>
<tr>
<td>Affiliate Process for Visiting Scholars, Unpaid Volunteers, and Unpaid Interns</td>
<td>4</td>
</tr>
<tr>
<td>Affiliate Process for Independent Contractors</td>
<td>5</td>
</tr>
<tr>
<td>Affiliate Process for All Other Affiliates</td>
<td>6</td>
</tr>
<tr>
<td>Check for an Existing PID</td>
<td>7</td>
</tr>
<tr>
<td>Submitting an Affiliate in the Affiliate Request System</td>
<td>15</td>
</tr>
<tr>
<td>Submitting an Affiliate ePar</td>
<td>18</td>
</tr>
<tr>
<td>Add an Unpaid Request</td>
<td>22</td>
</tr>
<tr>
<td>Terminating an Affiliate</td>
<td>30</td>
</tr>
<tr>
<td>Updating an Affiliate</td>
<td>33</td>
</tr>
<tr>
<td>Affiliate Resources and Examples of Emails</td>
<td>38</td>
</tr>
<tr>
<td>Affiliate Definitions, Types of Access, and Preferred Time Limits</td>
<td>40</td>
</tr>
</tbody>
</table>
An affiliate is:

- Anyone who is working in conjunction with UNC, requiring University services.
- Does not include students, anyone paid by UNC Payroll, teaching for UNC for-credit courses, enrolled in classes, or UNC Health Care employees.
- Retirees and Emeritus Faculty go through HR Benefits.
- Must have a UNC-CH Sponsor.

Affiliate authorization expiration dates are determined by the department and can be no longer than 5 years.

Affiliates can have multiple affiliations with UNC. Each affiliate type will require a new Affiliate ePar.

PID Office will recycle/deny a request that includes duties related teaching or “auditing courses”. Anyone auditing a course must go through the Registrar’s Office.

Affiliate Access:

- All affiliates, except volunteers, AHEC, and EHS receive an onyen, library access, and email.
- Volunteers do not receive library access.
- EHS associates only receive a PID.
- OneCards:
  - OneCards must be obtained after affiliate action has been approved in CC.
  - Affiliates must take their DL, State ID, Military ID, or passport for identification purposes, as well as their PID.
  - Please check with the OneCard Office to see if there will be a $10 fee (departments may pay fee through CC).

Approval:

- Advanced approval is required for Visiting Scholars, Unpaid Interns, Unpaid Volunteers, and Independent Contractors.
- Affiliates cannot begin providing services until approval is received from the Employment Consultant.
Affiliate Types

There are over 20 types of affiliates. These are the most common we see in the College of Arts & Sciences. Please note the differences between Visiting Scholar and Research Collaborator.

<table>
<thead>
<tr>
<th>Affiliate Type</th>
<th>Definition</th>
<th>Background Check Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting Scholar</td>
<td>Individuals who hold appointments at other academic or research institutions, visiting to work with a particular faculty member or PI on a research project and does not hold a paid appointment at UNC-CH. (Normally working on their own research and on campus.)</td>
<td>Yes</td>
</tr>
<tr>
<td>Research Collaborator</td>
<td>An individual who is collaborating on UNC department or UNC faculty driven research. (Working on UNC/Faculty research and normally off campus.)</td>
<td>No</td>
</tr>
<tr>
<td>Unpaid Volunteer</td>
<td>Individuals who offer their services without cost to the University for civic reasons and which are not typically performed by permanent university employees.</td>
<td>Yes</td>
</tr>
<tr>
<td>Unpaid Intern</td>
<td>Individuals who meet one of the following circumstances:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Currently enrolled at UNC-CH or other accredited colleges, universities, community colleges, or high schools and are engaged in experimental learning in the workplace in return for academic or course credit.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Are obtaining work experience that is required for professional licensure or certification under the supervision of a licensed or certified professional (e.g., Social Workers, Engineers, Nurses, or Accountants) for a period not to exceed 18 months in duration.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. 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 in duration.</td>
<td></td>
</tr>
<tr>
<td>Independent Contractors</td>
<td>A person not working for a company, but independently under contract with the University.</td>
<td>Yes</td>
</tr>
<tr>
<td>Retirees</td>
<td>Retired from a paid position in the department. These go through OHR Benefits Office.</td>
<td>No</td>
</tr>
<tr>
<td>Emeritus Faculty</td>
<td>Retired from a paid position in a department, prestigious designation. These go through OHR Benefits Office.</td>
<td>No</td>
</tr>
</tbody>
</table>
# Affiliate Process for Visiting Scholars, Unpaid Volunteers, and Unpaid Interns

<table>
<thead>
<tr>
<th>Responsible Party</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manager</strong></td>
<td>Receives information about an affiliate. <strong>Must check system to see if affiliate already has a PID. This is especially important for the Background Check. A person should only have one PID.</strong></td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>Submits BGC RASR Request to HRBP. If a PID exists, include it in the RASR request. If the BGC is no longer needed, alert your HRBP via the BGC RASR request.</td>
</tr>
<tr>
<td><strong>HRBP</strong></td>
<td>Submits BGC &amp; informs manager of results/completion in RASR and closes RASR request.</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>Submits Add Unpaid Request in CC and upload the signed Release of Liability Form. Unpaid Request routes to HRBP for approval.</td>
</tr>
<tr>
<td><strong>HRBP</strong></td>
<td>Reviews the Unpaid Request in CC and approves. Unpaid Request routes request to OHR for final approval.</td>
</tr>
<tr>
<td><strong>OHR</strong></td>
<td>Reviews and approves Unpaid Request in CC; or recycles/denies with questions to Manager.</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>Receives an email from OHR once the Unpaid Request Form has been approved. The process is on hold until OHR approval is received. Once OHR approval is received, submit the Add/Update Affiliate ePar. Include any necessary reasons for access in the comments of the ePar. For example, Affiliate will need access to UNC’s Library both in-person and online or Affiliate will need a OneCard to access XXX building. Provide Affiliate with PID.</td>
</tr>
<tr>
<td><strong>Affiliate</strong></td>
<td>Creates Onyen and visits OneCard Office, if needed.</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>If there is any change to the start/end dates, etc., OHR approval is required. Start the process over by submitting a new Add Unpaid Request for HRBP/OHR approval on the changes. Enter comments on the request that pertain to the change needed.</td>
</tr>
</tbody>
</table>
### Responsible Party | Task
--- | ---
Manager | Receives information about an affiliate.  
**Must check system to see if affiliate already has a PID. This is especially important for the Background Check. A person should only have one PID.**
Manager | Submits BGC RASR Request to HRBP. If a PID exists, include it in the RASR request.  
If the BGC is no longer needed, alert your HRBP via the BGC RASR request.
HRBP | Submits BGC & informs manager of results/completion in RASR and closes RASR request.
Manager  
BA/Accountant | Provides IC with PID.  
CASBO HR does not handle actions related to ICs.  
Manager will work with BA/Accountant for items related to ICs. This will include submitting an ePar if the IC will need an affiliate status for a onecard, etc.
Affiliate Process for All Other Affiliates

This process is for any affiliate that does not require OHR approval or a Background Check.

This does not include Retirees and Emeritus. These affiliates are handled through OHR Benefits.

<table>
<thead>
<tr>
<th>Responsible Party</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Receives information about an affiliate. Must check system to see if affiliate already has a PID. <em>This is especially important due to how an affiliate will need to be entered into the system.</em></td>
</tr>
</tbody>
</table>
| Manager           | **If a PID exists**, submit the Add/Update Affiliate ePar.  
If a PID does not exist, submit a request in the Affiliate Request System (ARS).  
In either case, include any necessary reasons for access in the comments. For example, Affiliate will need an Onyen and OneCard to access UNC Library, both in-person and online, DUO, MS Teams, and access to XXX building. |
| PID Office        | Reviews, approves/recycles Affiliate ePar or the ARS.  
If the ARS is used because a PID does not exist, the PID Office will submit the Affiliate ePar and then provide the manager with the affiliate’s PID via email. |
| Manager           | Provides affiliate with PID. |
| Affiliate         | Creates an Onyen and visits OneCard Office, if needed. |
Check for an Existing PID

It is extremely important to ALWAYS check for an existing PID for a person.

This is important for:
- Background Checks
- ePars
- Affiliate Request System (ARS)

A person must only have one PID and if a second PID is created, it only causes confusion.

UNC Systems have multiple ways to check for an existing PID, including:
- GradStar (and other student systems), which CASBO does not use.
- Connect Carolina
- Infoporte
- Affiliate Request System

When checking for an existing PID, you MUST use all the systems to which you have access. On occasion, one system may show a PID for a person and another may not. You do not want to miss a PID.

The systems used by CASBO HR to check for an existing PID are:
- Connect Carolina - Find Existing PID
- Connect Carolina - Affiliate Information
- Affiliate Request System
- Infoporte

How to use these systems to find an existing PID are outlined in the following pages. Please note:
- as a department manager you may or may not have access to these options. If you do not have access, move on to the next system.
- if you have access to the systems below, our screen shots may not look the same.
- please use all the systems to which you do have access.
Connect Carolina – Hiring - Find Existing PID:

In CC, locate & Click on Find Existing PID link.

On the PID Fetch screen, enter the Affiliate’s First and Last name. Click Search.

The Fetch Results screen will appear. The screen will show “no rows found” or show all persons with a similar name. If there is more than one person with the same name, you will need to check the middle name, gender, or the date of birth to verify if the affiliate already has a PID.
ConnectCarolina - Affiliate Request System (ARS):
The Affiliate Request System (ARS) is used to enter an Affiliate when no PID exists, and no background check is required. ARS is also used to see if a person has a PID. All CC Basic Originators should have access to ARS.

In CC, locate and click the link for Affiliate Request System.

The Affiliate Request Management Screen will appear. Click “You are logged in, click here for the main menu”.

On the Main Menu screen, click Search. There are two options - you can click either one.
The Search Screen will appear. Enter as much information as possible and click Search.

The screen will state that no results found or provide a list of Affiliates with a similar name.

If more than one result is listed, check the full name, date of birth, and gender to determine if the Affiliate is listed with a PID.

In the example above, note that it only shows 10 entries per page, but it is displaying Page 1 of 3. To see all names, click through each page, or use the drop-down menu to change the number of Entries Per Page.
ConnectCarolina - Affiliate Information:

Affiliate Information/Data allows you to look up information on an Affiliate that includes their PID, Affiliate Type, Department, Start/End Date, Status, Sponsor, Reason for Affiliation, etc.

In CC, locate and Click the NavBar Icon. Then Click Navigator.

Click HR/Payroll Menu and choose Workforce Administration.

Click Affiliate Information.
Click Affiliate Information again.

On the Affiliate Data Screen, enter the First & Last name, check the Include History box, and click Search.

Checking the Include History box allows you to view the person’s status: both active and inactive.
If there is more than one affiliate with the same name, they will appear in the Search Results. If a middle name is available, click on the correct person. Otherwise, click on each person to view their information.

If the middle name is not known, it is highly recommended to look up each person by their PID to find their birthdate, address, or other information to confirm this is person that needs the affiliate status.

The Affiliate Information for the person will appear.

Ramses Ram
Empl ID: 123456789

Affiliate Type: Volunteer

Affiliate Information

Sponsor Dept: 426801
Affiliate Start Date: 04/14/2022
Effective Sequence: 1
Affiliate Status: Active
Full/Part?: PT
“Will this Person Be on Campus? Yes No
Does This Person Need a One Card? Yes No
Passed Background Check? No
Affiliate Title: HealthScore Health Coach
Sponsor ID: 111111111
Sponsor Email Addi: bluedevil@email.edu
919-111-1111 BLUE DEVIL
Reaso for this Affiliation: On our study and she need
website to record the data from her coaching calls. We also use Zoom and having an Onyen allows her access to
a HIPAA compliant zoom account. Finally, she will need to communicate directly via email with UNC cancer center
patients, so she will need a UNC email to do so in a HIPAA compliant manner.
Infoporte:

In Infoporte, click the HR tab.

The main working screen will appear.

A search can be done on the Employees tab; however, employees cannot have affiliate status.

Click the Affiliate tab. The Affiliate List screen will appear.

This list can be filtered by Dates, Affiliate Type, Description, and Department, etc. Description is Arts & Sciences. The list will include the PID, Name, Department, Active and Inactive affiliates, etc.
The Affiliate Request System (ARS) is used to enter an Affiliate when no PID exists. ARS is also used to see if a person has a PID. Once an ARS request is submitted, it routes to the PID Office. The PID Office will either approve, deny, or recycle the request. When approved, the PID Office assigns a PID to the Affiliate and submits the Affiliate ePar. The PID Office will send an email to the ARS request submitter to provide the ePar number and the Affiliate’s PID.

In Connect Carolina, click the link for Affiliate Request System.

The Affiliate Request Management Screen will appear. Click “You are logged in, click here for the main menu”.

On the Main Menu screen, click Create Request. There are two options - you can click either one.
The Create Affiliate Request screen will appear.

An * will show all required information that needs to be completed.

<table>
<thead>
<tr>
<th>Request Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status: PENDING</td>
</tr>
</tbody>
</table>

Do not change the status. To submit a request, the status must remain at PENDING.

**Personal Information**

- **First Name:**
- **Name:**
- **Middle Name:**
- **Last Name:**
- **Name Suffix:**
- **Date of Birth (mm/dd/yy):**
- **Gender:**
- **SSN:** (Note: SSNs are required for reimbursements.)

**Affiliate Local Home Address**

- **Local Home Address Line 1:**
- **Local Home Address Line 2:**
- **Local Home Country:**
  - United Arab Emirates
  - United Kingdom
  - United States
  - Other

**Affiliate Local Work Address**

- **Local Work Address Line 1:**
- **Local Work Address Line 2:**
- **Local Work Campus Box #:**
- **Local Work Country:**
  - United Arab Emirates
  - United Kingdom
  - United States
  - Other

**Affiliate Phone**

- **Affiliate Phone #:** *No punctuation, just digits. Precede international phone numbers with a “+” followed by the country code.
- **Affiliate Phone Type Code:** BUS2
- **Affiliate Phone Is Public:**

**Personal Information - Continued**

- **Affiliate Email Address:**
For Affiliate Remarks include activities person will be performing and any details concerning why they need a OneCard, Onyen, or other access. Examples include:

- Affiliate will be performing research related to extinct animals once located in Asia. (Just stating “performing research” is not acceptable. It must include what the research is about.)
- Affiliate will need a OneCard for Library access online and in person and access to XXX building.
- The Affiliate will need access to DUO, Teams, shared calendars, and secure drives.

Click the Notify HR Rep box and click Submit.

How to view your request after submission: on the Home Screen, click Inbox. ARS attaches an ID number to your request. The Inbox will show you the request numbers for both recycled requests and currently requested items.
Submitting an Affiliate ePar

If/When an affiliate has a PID, their action will be submitted via the Affiliate ePar. Please note: CASBO has found when an Affiliate submitted more than a month in advance, the PID Office recycles the ePar, asking that it be submitted closer to the effective date.

In ConnectCarolina, under HR WorkCenter, click ePar Home Page. Click Start new ePar.

Click Add or Update an Affiliate ePar

On the Affiliate Lookup Screen, enter the PID and click Search.
On the Add or Update an Affiliate Screen, the Affiliate’s name, PID, DOB, and Address will auto-populate.

Enter the Sponsor Department. Choose the Affiliate Type from the Drop-Down Menu. Based on the Affiliate Type chosen, the rest of the ePar will appear.

Add or Update an Affiliate

Step 1 of 1: Affiliate Data

It is highly recommended to complete all fields under Affiliate Details. The PID Office has recycled ePars in the past with fields left blank.

- Please note: for any Affiliate requiring prior approval from OHR, if the start/end date or any other information changes, approval must be received from OHR for those changes before the ePar can be submitted to make those changes. In this case, another Unpaid Request Form would need to be submitted.

Enter start/end date, answer both yes/no questions, and enter Full or Part Time.
Describe activities box: enter what the Affiliate will be doing.
- Stating “performing research” is not enough. What the research is about, or title must be included.
- Anything related to teaching or auditing a course will be recycled.
  - Affiliates cannot have teaching duties.
  - Auditing a course is handled by the Registrar’s Office.

Affiliate Title: simply enter in what type of Affiliate the person will be, ie: Visiting Scholar, Volunteer, Research Collaborator, etc.

Affiliates must have a Sponsor. If the phone number and email does not auto-populate, it must be filled in.

Affiliate Remarks: can be left blank or state the same as the describe activities box.
Details concerning the Affiliate’s needs for a OneCard, Onyen, and access should be included in the ePar. This information can also be placed in the Describe Activities Box, Affiliate Remarks Box, or the Comments. Examples include:

- Affiliate will need a OneCard to access XXX building.
- The Affiliate will need an Onyen and OneCard for access to UNC Libraries online and in person, to secure drives, shared calendars, DUO and Microsoft Teams.

No attachments are required for the ePar.

Click the Affiliate Background Check box.

Enter comments (normally what is placed in the describe activities box, plus access information).

- If a Background Check was completed, enter the BGC file number in the comments. This is the Form ID number on the completed BGC. The completed BGC request is uploaded to and can be found in the BGC RASR Request.
Add an Unpaid Request

The Unpaid Request Form is for OHR approval of Unpaid Visiting Scholars, Unpaid Interns, and Volunteers. The Background Check Request must be returned as clear before this form can be completed.

- Any changes to an Affiliate’s start/end date, etc., will require a new Unpaid Request Form to be submitted.

In ConnectCarolina, under HR WorkCenter, click Forms. Then click Add Unpaid Request.

This is the Unpaid Request Form Home Screen.
Enter Affiliate’s PID and answer all other questions.

The Department is Requesting box gives the options of Unpaid Intern, Unpaid Visiting Scholar, and Volunteer. Based on the Affiliate Type, other informational boxes will appear and need to be completed.

Background Check Satisfactory Completed gives the options of Not Required, Per BGC Use Prior Results, and Yes.

- Note for Per BGC Use Prior Results - if the Affiliate has had a BGC within a year, the HRBP will still need a BGC RASR Request submitted to enter the information and request permission for the prior results to be used.
- Background Check Form ID can be found on the BGC results page provided in the BGC RASR Request, once results have been returned.

Note: Home Institution will not be UNC for an Unpaid Visiting Scholar. UNC employees and students cannot be affiliates. Unpaid Visiting Scholars come to UNC from other institutions, such as businesses, research facilities, and other universities.

If the affiliate is a High School Student Working in a lab, check the related policies to make sure the department stays in compliance.

If a minor has graduated from high school and will be a matriculated undergraduate student in the upcoming semester they still must complete High School (Minor) Laboratory Worker Departmental Agreement Form in accordance with the University’s High School Student and Minors in Laboratories Policy.
The following is an option only and not required.

**Auto Populate**

If you are hiring several individuals for your department and would like to auto populate the information below based on the entry of a prior form please select the prior form ID using the search prompt.

Complete Department information. Department Contact is the Department Manager.

Describe Activities Box: describe what the affiliate will be doing. “Performing Research” is not adequate. Must include the research topic, title, etc.

<table>
<thead>
<tr>
<th>Proposed Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Department Contact</td>
</tr>
<tr>
<td>Research on Green building and urban renewal projects in China</td>
</tr>
</tbody>
</table>

*Describe any risks in the setting in which this assignment will occur (For example, exposures such as: thermal, chemical, or electrical hazards, lab animals, etc.)*  
NA

* Will this individual use or have access to UNC proprietary or controlled software, data, research instruments, manuals, or other technical information? *  
No  

If the answer is yes, another box will appear that will need to be completed.

Sensitive Populations: if yes is chosen, a box “Does this include work with minors?” and “Description of Sensitive Populations” box will appear and must be completed.

Sensitive Facilities and Sensitive Information: if yes is chosen, the “Description of Sensitive Populations” box will appear and must be completed.

### Unsupervised Activities

Involves Unsupervised Activities with Either of the Following: (If either are involved, include specifics in description below)

**Definitions:** Sensitive Populations, Sensitive Facilities and Sensitive Information

<table>
<thead>
<tr>
<th>*Sensitive Populations</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Sensitive Facilities</td>
<td>No</td>
</tr>
<tr>
<td>*Sensitive Information</td>
<td>No</td>
</tr>
</tbody>
</table>
Start and end date should be entered, as well as the Supervisor’s Name. The Supervisor’s Name box requires the supervisor’s Onyen. However, you can click on the magnifying glass to look up the person.

Next, you will see definitions and additional information as it pertains to affiliates:

- Volunteers
- Ongoing duration
- Unpaid Interns
- Unpaid Visiting Scholars
- Exclusions
- Background Checks
- Employment of Related Persons
- Affiliate Registration Process (if affiliate needs OneCard or Onyen)
- Sensitive Populations
- Sensitive Facilities
- Sensitive Information - including examples of Tier 2 Confidential information and Tier 3 Restricted information

If you are unsure of these areas, please read the information in the Unpaid Request.

Next Level Approval / Department Official: this is where the request needs to be sent for approval.

Enter your HRBP’s Onyen or use the magnifying glass to find them. Click Next.

If you know your HRBP is out of the office and this is urgent, you can enter the Onyen of the HRBP who is covering for them.
The last page of the Unpaid Request requires the Release of Liability Form to be uploaded. Make sure the Form is signed by the affiliate.

**Click Description and choose Release of Liability Form.**

**File Attachments**

<table>
<thead>
<tr>
<th>Status</th>
<th>Action</th>
<th>Description</th>
<th>File Name</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Upload</td>
<td></td>
<td></td>
<td>Delete</td>
</tr>
</tbody>
</table>

Next click Upload.

**File Attachments**

<table>
<thead>
<tr>
<th>Status</th>
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<tbody>
<tr>
<td>1</td>
<td>Upload</td>
<td>Release for Unpaid Vis</td>
<td></td>
<td>Delete</td>
</tr>
</tbody>
</table>

The File Attachment box will appear.

Click Choose From My Device. Search for the Release of Liability Form and choose the document on your computer.

Your document name will appear on the screen. Click Upload.
Click Done

Comments can be entered into the request but are not necessary. Do not upload any items or make comments related to Visa information. Click Submit.

The Confirmation Screen will appear. It will provide you with the Unpaid Request Form ID number.
How to check the status of an Unpaid Request:
In ConnectCarolina, under HR Work Center, click Forms. Click View Employee Forms.

The View an Employee eForms eForm will appear. Enter the Form ID of the request. Click Search.
The entire Unpaid Request will appear. Scroll to the bottom of the page and click Next.

The View Unpaid Request History screen will appear. Click View Approval Route.

The Unpaid Approval Route box will appear. Click Done when finished. As the Unpaid Request moves through approvals, the approval history will show here, as well as the next level of approval.

Note: you will receive an email when you submit a request and when the request is approved from employment@unc.edu.
Terminating an Affiliate

Affiliates can be terminated before their end date.

In ConnectCarolina, under HR WorkCenter, Click ePAR Home Page. Click Start new ePar.

Create a New ePar will appear. Click Add or update an Affiliate.

On the Affiliate Lookup Screen enter the Affiliate’s PID.
The Affiliate Data screen will appear. Enter the department number and choose current affiliate type.

The Affiliate Details will then auto populate. Change the Affiliate End Date to the termination date. If an Affiliate can no longer attend, the Affiliate End Date is the same as the Affiliate Start Date.

Affiliate Title and Sponsor information remains the same. Replace any Affiliate Remarks with the same information in the Describe Activities Box.

Change answers to the questions to 'No'.

Describe activities: simply state Affiliate is being terminated. If there is a specific reason, it can be added, if necessary.
No attachments are required.
Click Affiliate BGC box.
Enter comments - same as Describe Activities Box.
Click Submit.
Updating an Affiliate

Affiliates can be updated via the Affiliate ePar.

- Visiting Scholars, Unpaid Volunteers, and Unpaid Interns must have prior OHR approval before they can be updated, extended, or renewed.
- A new Add Unpaid Request will need to be submitted to receive OHR approval. (Check BGC policy to see if a new BGC request is required).

In ConnectCarolina, under HR WorkCenter, Click ePAR Home Page. Click Start a new ePar.

Under Create a New ePAR, click Add or Update an Affiliate.
On the Affiliate Lookup screen, enter the PID and click Search.

The Add or Update an Affiliate screen appears.
Enter the Sponsor Department and choose Affiliate Type.

The Affiliate Details will populate with the affiliate’s current start and end date.
Types of Updates:

End Date Change:
ie: Ramses Ram was scheduled to end his Research Collaborator affiliation on 11/30/23. However, the department wishes to extend this for another year.

Enter the new End Date.

Complete the remainder of the ePar as normal, including activities, any risks, sponsor information, comments, etc.

Click submit.

Inactive Affiliate: affiliate needs to have the same affiliation again.
ie: Ramses Ram was a volunteer with CRP for 3 months. The affiliation has ended and a few months later he needs to return for another 3 months.

- Reminder, OHR will need to approve the extension of a Visiting Scholar, Unpaid Volunteer, or Unpaid Intern.
- Start the process with a new Add Unpaid Request for approval.

Once OHR approval is received for the Volunteer affiliation, click Add New Entry.

Click Add New Entry.

Complete the ePar as normal including activities, any risks, sponsor information, comments, etc.

Click submit.
Affiliate has passed their maximum allotted time for the affiliate type:
ie: Ramses Ram was a Visiting Scholar for 5 years. His affiliation has ended, but he needs to remain a Visiting Scholar for another year.

- Reminder, OHR will need to approve the extension of a Visiting Scholar, Unpaid Volunteer, or Unpaid Intern.
- Start the process with a new Add Unpaid Request for approval.

Once OHR approval is received for the Volunteer affiliation, click Add New Entry.

Click Add New Entry.

Complete the ePar as normal including activities, any risks, sponsor information, comments, etc.

Click Submit.

Affiliate is receiving a second affiliate status within the same department:
This will not affect the affiliate’s current activity.
ie: Ramses Ram is a Research Collaborator in AAAD, but the department wants to add him as a Volunteer.

- Reminder, OHR will need to approve a Visiting Scholar, Unpaid Volunteer, or Unpaid Intern.
- Start the process with a New Add Unpaid Request for approval.

Once OHR approval is received for the Volunteer affiliation, click Add New Entry.

Complete the ePar as normal including activities, any risks, sponsor information, comments, etc.

Click Submit.
Affiliate has already been entered into the system and is active, but the start and end dates need to be changed:

ie: Ramses Ram is an Unpaid Visiting Scholar with an original start/end date of 4/1/23-12/31/23. Due to visa issues, he now needs a start/end date of 2/1/24 - 6/30/24. He is currently showing in ConnectCarolina as active from 4/1/23-12/31/23.

Terminate the affiliate’s current status. (See Terminating an Affiliate.)

Start the process with a New Add Unpaid Request for Approval.

Once OHR approval is received for the Visiting Scholar affiliation with the new dates, start a new Add/Update Affiliate ePAR. (See Submitting an Affiliate ePAR.)
Affiliate Resources and Examples of Emails

PID Office:
919-962-6568 / 919-962-5014 / 919-962-9344
pid@unc.edu
https://aux-services.unc.edu/pid/

Affiliate Status: Retirees & Emeritus Faculty
HR Benefits
919-962-3071
benefits@unc.edu
https://hr.unc.edu/benefits/

OneCard Office:
919-962-8024
oncecard@unc.edu
https://onecard.unc.edu/

Background Check Office:
backgroundcheck@unc.edu

Background Check Policy:
https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131796

Unpaid Volunteers, Interns, and Visiting Scholars:
https://hr.unc.edu/employees/policies/other/unpaid-volunteers-interns-visiting-scholars/

Independent Contractors: CASBO HR only does the BGC. Contact your Budget Analyst or Accountant or IC Review for other assistance.
IC_Review@unc.edu
https://finance.unc.edu/services/independent-contractor-management/
Examples of Emails:

Add Unpaid Request: you will receive an email when you submit a request and once it has been approved. The emails will come from employment@unc.edu.

This email is notification that the following Unpaid Request Form was successfully submitted on 04/06/2023.

Form ID: 
Employee: 
Department: 

You will receive another email when this request has been approved or denied.

If you have questions contact OHR at (919) 843-2300 or employment@unc.edu.

Thank you,
OHR Employment and Staffing

Affiliate Request System: the PID Office will send an email when the ARS request has been finalized. They may also send emails if they have questions.

Affiliate Request Status Change

Wendy Pender,

Affiliate Request Action # has been approved and the corresponding ePAR has been completed.

Please note the start-end dates for the position are: 05/01/2021 to 04/30/2022.

Please let us know if you have any questions.

Thanks, PID Office

PID Office | University of North Carolina at Chapel Hill | Daniels Building | CB# 1530 Chapel Hill, NC 27599 | pid@unc.edu | T: 919-962-5014 | F: 919-962-8217
## Affiliate Definitions, Types of Access, and Preferred Time Limits

This is the most up-to-date list from the PID Office as of March 2023.

<table>
<thead>
<tr>
<th>Affiliate</th>
<th>Definition</th>
<th>ONYEN?</th>
<th>Email?</th>
<th>Library?</th>
<th>One Card Eligible?</th>
<th>Preferred Time Limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Ministries / Hillel</td>
<td>Ministers and staff of Campus Ministries, Campus Crusades, and NC Hillel.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>1-2 years max.</td>
</tr>
<tr>
<td>Carolina Club Employee</td>
<td>Employees of the Carolina Club.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>5 year max.</td>
</tr>
<tr>
<td>Carolina Dining Employee</td>
<td>Employees of Carolina Dining Services.</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>1-2 years max.</td>
</tr>
<tr>
<td>EHS Associate</td>
<td>Affiliates that need to take Environmental, Health &amp; Safety training and are not paid through a UNC department.</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>5 year max.</td>
</tr>
<tr>
<td>External Employee</td>
<td>Employees whose department’s budget does not fall under payroll, but have a close affiliation.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>5 year max.</td>
</tr>
<tr>
<td>Emeritus Faculty</td>
<td>Retired from a paid faculty position in the department.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>10 year max.</td>
</tr>
<tr>
<td>Fellow - Unpaid</td>
<td>Affiliates that are receiving funding from an external fellowship and are working with Carolina.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>5 year max.</td>
</tr>
<tr>
<td>US Envir Protection Agency</td>
<td>Employee of the US Environmental Protection Agency working on campus or require access for IRB studies.</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>5 year max.</td>
</tr>
<tr>
<td>Other Affiliate</td>
<td>A person who does not fit into any of the other categories. (should be rarely used)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>1 year max.</td>
</tr>
<tr>
<td>Research Collaborator</td>
<td>An individual who is collaborating on UNC department or UNC faculty driven research.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>5 year max.</td>
</tr>
<tr>
<td>Retiree</td>
<td>Retired from a paid position in the department.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>10 year max.</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>TBD by the Office of the Chancellor. Max 5 years</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>UNC Trustee</td>
<td>A UNC Board of Trustee member</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Visiting Scholar</td>
<td>Individuals who hold appointments at other academic or research institutions and are visiting to work with a particular faculty member or principal investigator on a research project but do not receive a paid appointment at UNC-Chapel Hill. (See UNC OHR for changes in Policy)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>TBD by OHR; Max 5 years</td>
</tr>
<tr>
<td>Volunteer</td>
<td>Individuals who offer their services without cost to the University for civic reasons and which are not typically performed by permanent University employees. (See UNC OHR for changes in Policy)</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>TBD by OHR; Max 2 years</td>
</tr>
<tr>
<td>Independent Contractor</td>
<td>A person not working for a company, but independently under contract with the University. (See UNC F&amp;A for changes in Policy)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>2 year max.</td>
</tr>
<tr>
<td>Role</td>
<td>Definition</td>
<td>Y/N</td>
<td>Y/N</td>
<td>Y/N</td>
<td>Y/N</td>
<td>Duration</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
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<td>----------------</td>
</tr>
<tr>
<td><strong>Intern</strong></td>
<td>Individuals who meet one of the following circumstances: 1) 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. 2) Are obtaining work experience that is required for professional licensure or certification under the supervision of a licensed or certified professional (e.g., Social Workers, Engineers, Nurses, and Accountants) for a period not to exceed 18 months in duration. 3) 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 in duration. (See UNC OHR for changes in Policy)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>TBD by OHR; Max 5 years</td>
</tr>
<tr>
<td><strong>University Temp Svcs Employee</strong></td>
<td>A temporary employee through University Targeted Staffing.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>1 year max.</td>
</tr>
<tr>
<td><strong>Other Contractor/Consultant</strong></td>
<td>Employed or paid by an external company or source.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>1-2 years max.</td>
</tr>
<tr>
<td><strong>Summer Group</strong></td>
<td>A group that is only on campus for part or all of the summer, but are not students of the University.</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>1 year max.</td>
</tr>
<tr>
<td><strong>Friday Center Staff</strong></td>
<td>Instructor working for the Friday Center and are not paid for by the University or associated with Carolina, except through work with the Friday Center (i.e. Instructor from other universities that are teaching through the Friday Center and credit it giving through the other Universities.)</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>5 years max.</td>
</tr>
<tr>
<td><strong>Preceptor</strong></td>
<td>A practicing professional who gives personal instruction, training, and supervision to a student or young professional. (not Med or Dental)</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>1-2 years max.</td>
</tr>
<tr>
<td>Committee/Board Member</td>
<td>Description</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>5 years max.</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>--------------</td>
</tr>
<tr>
<td>Committee/Board Member</td>
<td>A person who is serving on a Committee or Board (not Board of Trustees)</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>5 years max.</td>
</tr>
<tr>
<td>Emergency Official</td>
<td>External Emergency Officials who need access to the Campus Alert System.</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>5 years max.</td>
</tr>
<tr>
<td>AHEC Affiliate</td>
<td>AHEC professionals needing access to the AHEC system housed at Carolina.</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>5 years max.</td>
</tr>
<tr>
<td>Student - Grants PI</td>
<td>Current students who need finance access because they are also Primary Investigators for a grant</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N/A</td>
<td>1 year max.</td>
</tr>
<tr>
<td>Hospital Associate</td>
<td>A staff member who is paid by the hospital, but works on the University side and needs University resources.</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>1 year max.</td>
</tr>
</tbody>
</table>