Affiliates

College of Arts & Sciences Business Operations

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What is an Affiliate? Affiliate Access and Affiliate Approval

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:
    - o OneCards must be obtained after affiliate action has been approved in CC.
    - o Affiliates must take their DL, State ID, Military ID, or passport for identification purposes, as well as their PID.
    - o 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.

Affiliate Type	Definition	Background Check Required
Visiting Scholar	**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.)	Yes
Research Collaborator	**An individual who is collaborating on UNC department or UNC faculty driven research.** (Working on UNC/Faculty research and normally off campus.)	No
Unpaid Volunteer	Individuals who offer their services without cost to the University for civic reasons and which are not typically performed by permanent university employees.	Yes
Unpaid Intern	Individuals who meet one of the following circumstances: 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. 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. 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.	Yes
Independent Contractors	A person not working for a company, but independently under contract with the University.	Yes
Retirees	Retired from a paid position in the department. These go through OHR Benefits Office.	No
Emeritus Faculty	Retired from a paid position in a department, prestigious designation. These go through OHR Benefits Office.	No

Affiliate Process for Visiting Scholars, Unpaid Volunteers, and Unpaid Interns

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	Submits Add Unpaid Request in CC and upload the signed Release of Liability Form. Unpaid Request routes to HRBP for approval.
HRBP	Reviews the Unpaid Request in CC and approves. Unpaid Request routes request to OHR for final approval.
OHR	Reviews and approves Unpaid Request in CC; or recycles/denies with questions to Manager.
Manager	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.
Affiliate	Creates Onyen and visits OneCard Office, if needed.
Manager	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.

Affiliate Process Independent Contractors

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.

Responsible Party	Task
Manager	Receives information about an affiliate. Must check system to see if affiliate already has a PID. *This is especially important due to how an affiliate will need to be entered into the system.*
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
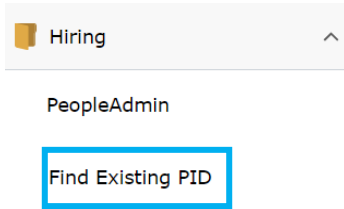
How to use these systems to find an existing PID are outlined in the following pages. Please note:
- as a department manager you may or may not have access to these options. If you do not have access, move on to the next system.
- if you have access to the systems below, our screen shots may not look the same.
- please use all the systems to which you do have access.

ConnectCarolina – Hiring – Find Existing PID:

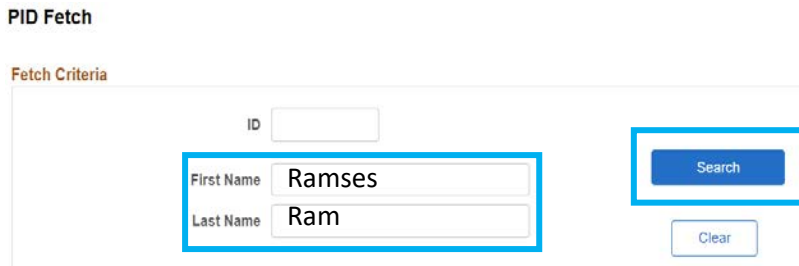In CC, locate & Click on Find Existing PID link.

Hiring   ∧

    PeopleAdmin

    Find Existing PID

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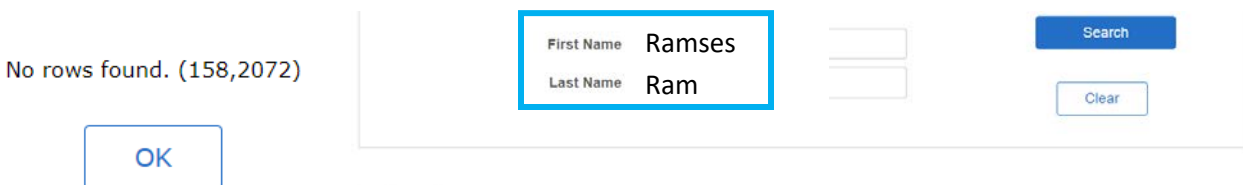
PID Fetch

Fetch Criteria

ID

First Name   Ramses
Last Name   Ram

Search

Clear

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.

No rows found. (158,2072)
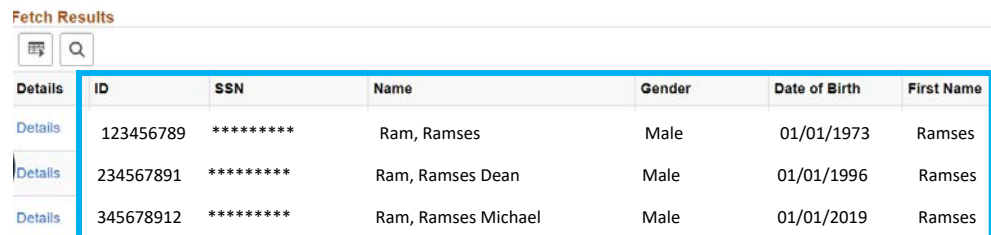
OK

First Name   Ramses
Last Name   Ram

Search

Clear

Fetch Results

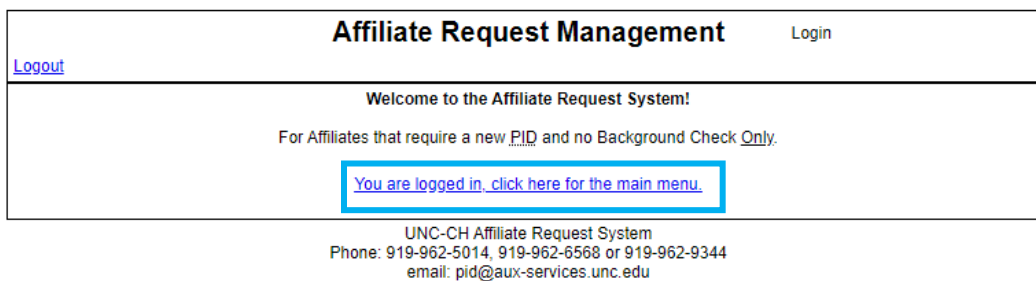| Details	ID	SSN	Name	Gender	Date of Birth	First Name
Details	123456789	*********	Ram, Ramses	Male	01/01/1973	Ramses
Details	234567891	*********	Ram, Ramses Dean	Male	01/01/1996	Ramses
Details	345678912	*********	Ram, Ramses Michael	Male	01/01/2019	Ramses

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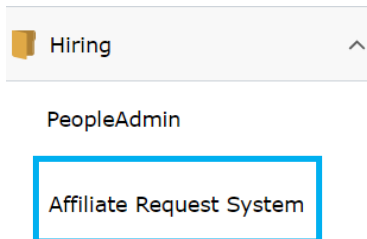
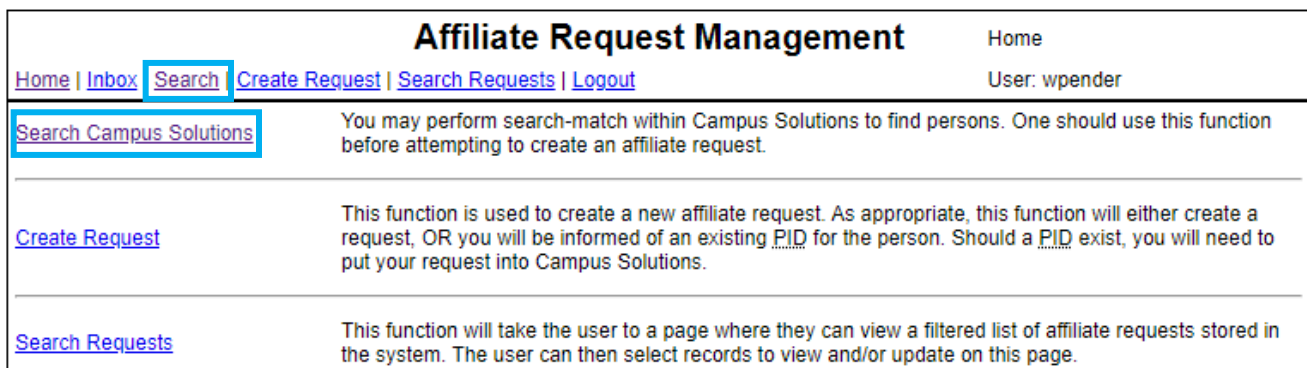The Affiliate Request Management Screen will appear. Click "You are logged in, click here for the main menu".

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.
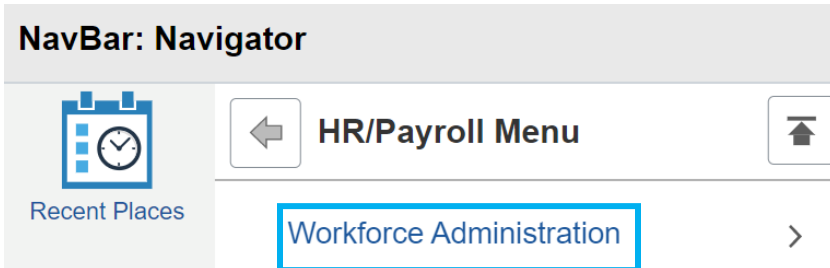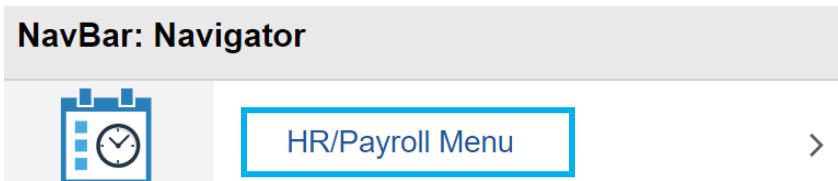
ConnectCarolina – Affiliate Information:

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.

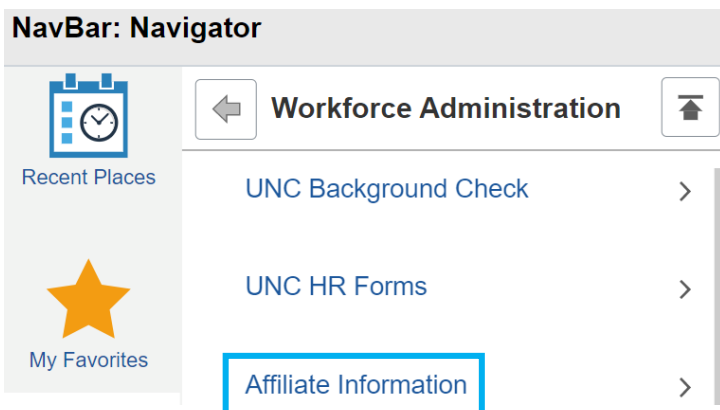In CC, locate and Click the NavBar Icon. Then Click Navigator.
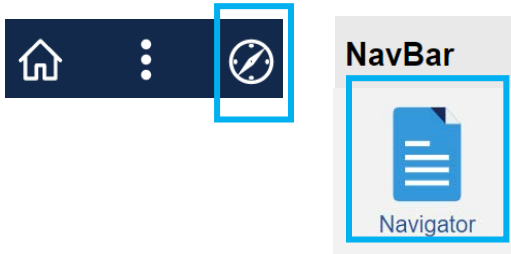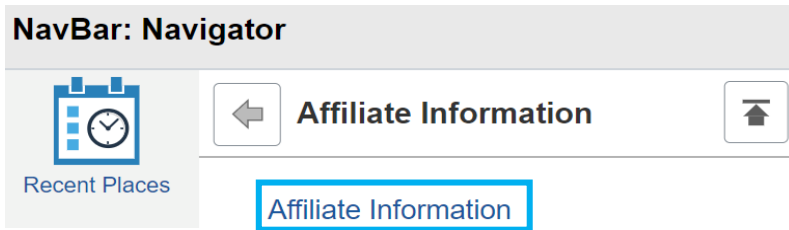
Click HR/Payroll Menu and choose Workforce Administration.

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.

Last Name	begins with ∨	Ram
First Name	begins with ∨	Ramses
Second Last Name	begins with ∨	
Alternate Character Name	begins with ∨	
Middle Name	begins with ∨	

☐ Include History ☐ Case Sensitive

[Search] [Clear] Basic Search ⧉ Save Search Criteria

Search Results

| View All | | | ◁ ◀ | 1-2 of 2 ∨ | ▶ ▷ |

Empl ID	Name	Last Name	First Name	Middle Name
	Ram, Ramses	Ram	Ramses	
	Ram, Ramses Dean	Ram	Ramses	Dean

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 Information   🔍 | ◁ ◀ 1 of 1 ∨ ▶

| Affiliate Type | Volunteer |

Affiliate Information   🔍 | ◁ ◀ 1 of 2 ∨ ▶ ▷

Sponsor Dept:	426801		
Affiliate Start Date:	04/14/2022	Affiliate End Date:	04/14/2024
Effective Sequence:	1	Full/Part?	PT
Affiliate Status	Active		
*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:	~~7~~ ... ~~CHARLOTTE BAILEY~~ 111111111 BLUE DEVIL		
Sponsor Phone Nbr:	919-111-1111	~~S~~ponsor Email Add~~r~~	bluedevil@email.edu
Reason for this Affiliatio~~n~~	...ch 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.
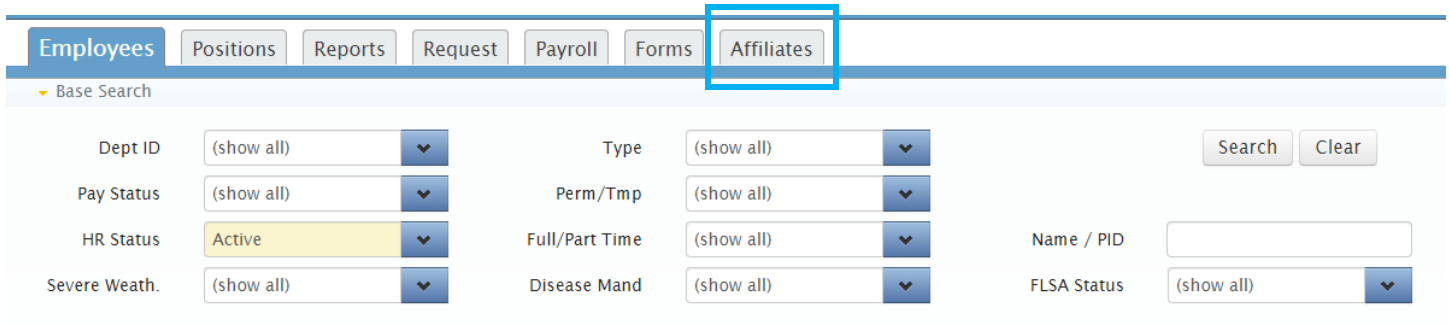
| Last Update Date/Time: | 01/17/23 12:49:57PM | Last Update User ID: | NC_HC_GT_SYS_ID |

<u>Infoporte:</u>

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.

Affiliate List

Effective Date		End Date		Employee ID
2/6/2012	4/5/2023	10/3/2019	11/16/2030	

Affiliate Type	Level3 Description	Department Label
Visiting Scholar	(All)	315600:City and Regional Planning

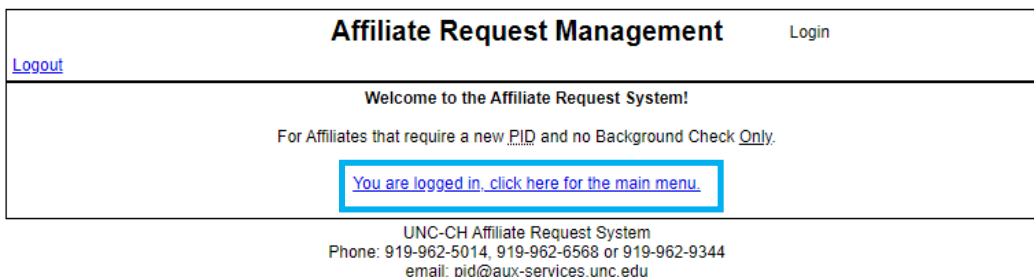| Employee ID	Employee Name	Sponsor De..	Department Description	Affiliate St..	Sponsor Na..	Affiliate Type	Effective D..	End Date
730				Active		Visiting Scholar	12/31/2022	12/30/2023
730				Active		Visiting Scholar	3/22/2022	4/1/2024
730				Inactive		Visiting Scholar	12/20/2021	12/19/2022
730				Active		Visiting Scholar	12/1/2021	12/23/2023
730				Inactive		Visiting Scholar	1/10/2022	1/30/2023
730				Active		Visiting Scholar	5/1/2022	5/25/2023
730				Active		Visiting Scholar	6/1/2022	5/31/2023
730				Active		Visiting Scholar	8/1/2022	7/31/2023
730				Active		Visiting Scholar	8/20/2022	9/30/2023
730				Active		Visiting Scholar	8/1/2022	9/30/2023
730				Active		Visiting Scholar	10/1/2022	9/30/2023
730				Active		Visiting Scholar	10/1/2022	9/30/2023
730				Active		Visiting Scholar	9/1/2022	8/31/2023
730				Inactive		Visiting Scholar	9/23/2022	9/23/2022
730				Active		Visiting Scholar	9/22/2022	10/31/2023
730				Active		Visiting Scholar	9/26/2022	9/25/2023
730				Active		Visiting Scholar	11/1/2022	10/31/2023

Submitting an Affiliate in the Affiliate Request System

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.
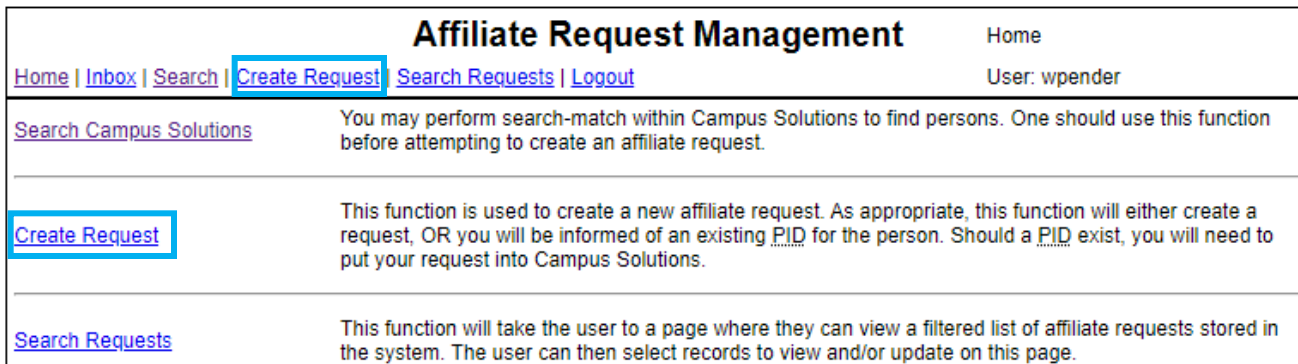
In Connect Carolina, click the link for Affiliate Request System.
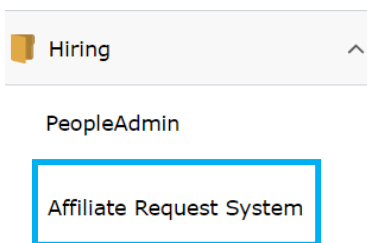
🟫 Hiring	∧
PeopleAdmin	
Affiliate Request System	

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

Affiliate Request Management   Login

Logout

Welcome to the Affiliate Request System!

For Affiliates that require a new PID and no Background Check Only.

You are logged in, click here for the main menu.

UNC-CH Affiliate Request System
Phone: 919-962-5014, 919-962-6568 or 919-962-9344
email: pid@aux-services.unc.edu

On the Main Menu screen, click Create Request. There are two options – you can click either one.

Affiliate Request Management   Home

Home | Inbox | Search | Create Request | Search Requests | Logout   User: wpender

Search Campus Solutions	You may perform search-match within Campus Solutions to find persons. One should use this function before attempting to create an affiliate request.
Create Request	This function is used to create a new affiliate request. As appropriate, this function will either create a request, OR you will be informed of an existing PID for the person. Should a PID exist, you will need to put your request into Campus Solutions.
Search Requests	This function will take the user to a page where they can view a filtered list of affiliate requests stored in the system. The user can then select records to view and/or update on this page.

The Create Affiliate Request screen will appear.

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

Affiliate Request Management   Create Affiliate Request

Home | Inbox | Search | Create Request | Search Requests | Logout   User: wpender

Create Affiliate Request

Request Status

Status:
AUTHORIZED
DENIED
PENDING

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

Personal Information

Name:
First Name: [   ] *
Middle Name: [   ]
Last Name: [   ] *
Name Suffix: [v]

Date of Birth: (mm/dd/yyyy) [   ] *

Gender: [Select Gender v] *

SSN: [   ] (Note: SSNs are required for reimbursements.)

Affiliate Local Home Address

Local Home Address Line 1: [   ] *
Local Home Address Line 2: [   ]

Local Home Country:
Ukraine
United Arab Emirates
United Kingdom
United States

Local Home City: [   ] *
[New Jersey]

Affiliate Local Work Address

Local Work Address Line 1: [   ] *
Local Work Address Line 2: [   ]
Local Work Campus Box #: [   ]

Local Work Country:
Ukraine
United Arab Emirates
United Kingdom
United States

Local Work City: [   ] *

Local Work City, State ZIP:
New Jersey
New Mexico
New York
North Carolina

Local Work State:
Local Work Zip Code: [   ]

Public Directory Entry: [Yes v]

Affiliate Phone

Affiliate Phone #: [   ] * No punctuation, just digits. Precede international phone numbers with a "+" followed by the country code.

Affiliate Phone Type Code: [BUS2 v] B-Business Phone 2, H-Home

Affiliate Phone Is Public: [No v]

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   *Authored by*

Step 1 of 1: Affiliate Data

▼ **Affiliate Information**

| Name: | Ramses Ram | Empl ID: | 12345678 | eForm ID: | 1842793 |

Date of Birth: 01/01/1985

Address: UNC Campus, Chapel Hill, NC 27599

Sponsor Department: 311900 🔍 Philosophy   Affiliate Type:

Independent Contractor
Intern
Other Affiliate
Other Contractor/Consultant
Preceptor
Research Collaborator
Retiree
Student Grants PI
Summer Group
UNC Trustee
US Envir Protection Agncy
University Temp Svcs Employee
Visiting Scholar

File Attachments

	Upload	View	Description	Doc ID	
1	Upload	View	🔍		

Add File Attachment

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.

Affiliate Details

*Affiliate Start Date: [   ] 📅

*Affiliate End Date: [   ] 📅

Affiliate Status:

*Will this Person Be on Campus?   ○ Yes   ◉ No   Full or Part Time: [▼]

Does this Person Need a One Card?   ○ Yes   ◉ No

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.

Describe activities and specify environment setting:

Describe Any Risks in the Setting in Which this Assignment Will Occur:

Complete this box if there are any risks. Otherwise, just state N/A

Check the Appropriate Box if this Assignment Involves Unsupervised Activities with Either of the Following:

☐ Sensitive Populations   ☐ Sensitive Facilities

Description of Sensitive Populations/Facilities (if applicable):

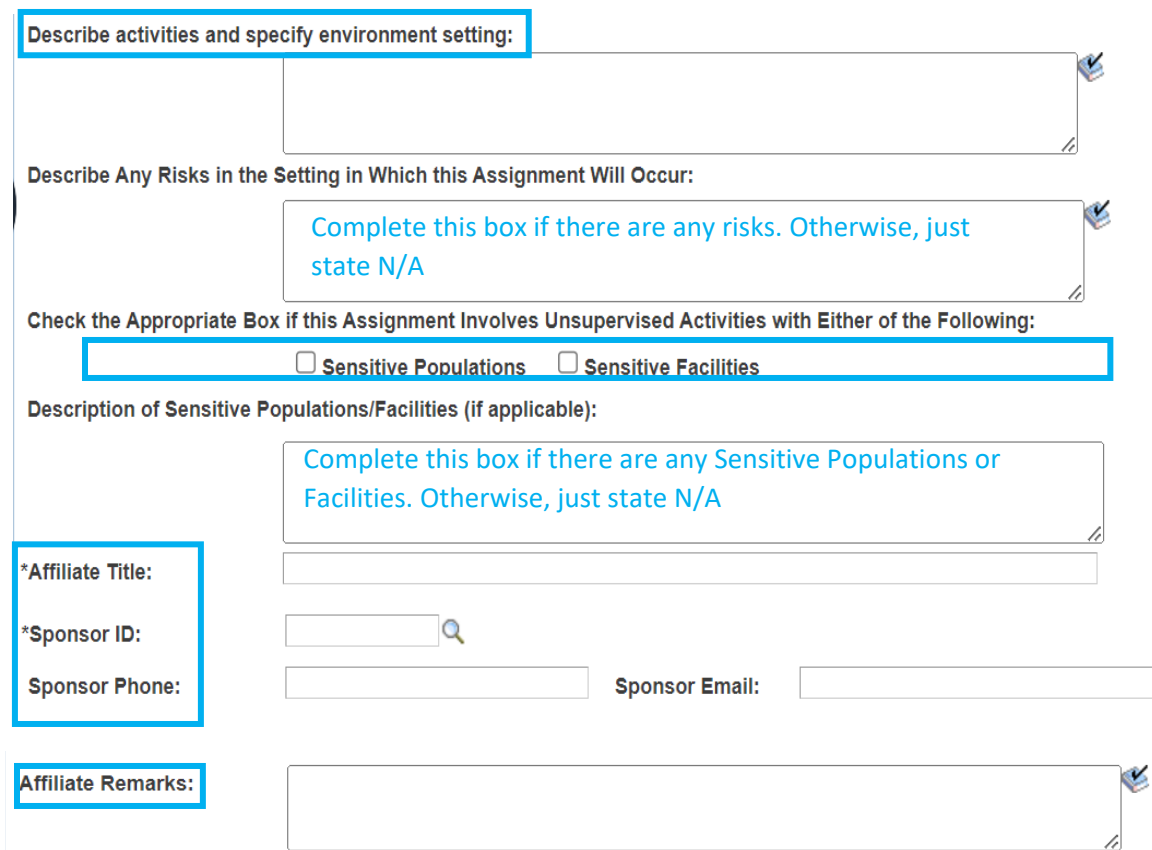Complete this box if there are any Sensitive Populations or Facilities. Otherwise, just state N/A

*Affiliate Title:

*Sponsor ID:

Sponsor Phone: Sponsor Email:

Affiliate Remarks:

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 on-line 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.

File Attachments

	Upload	View	Description	Doc ID	
1	Upload	View	🔍		Delete

Add File Attachment

Form Messages

		Message Text	Description
☐	⚠	Affiliate Background Check	I certify that, where policy requires it, I have received notice from the Office of Human Resources that a background check has been completed for this individual. In the comments section, I have included the background check file number, or a justification as to why the number is not required.

Comments

Your Comment:

[ ]

<< Previous   Submit

<< Search   Close

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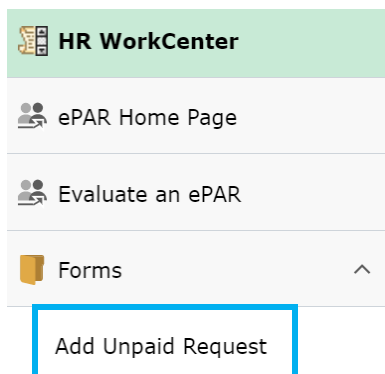
This is the Unpaid Request Form Home Screen.
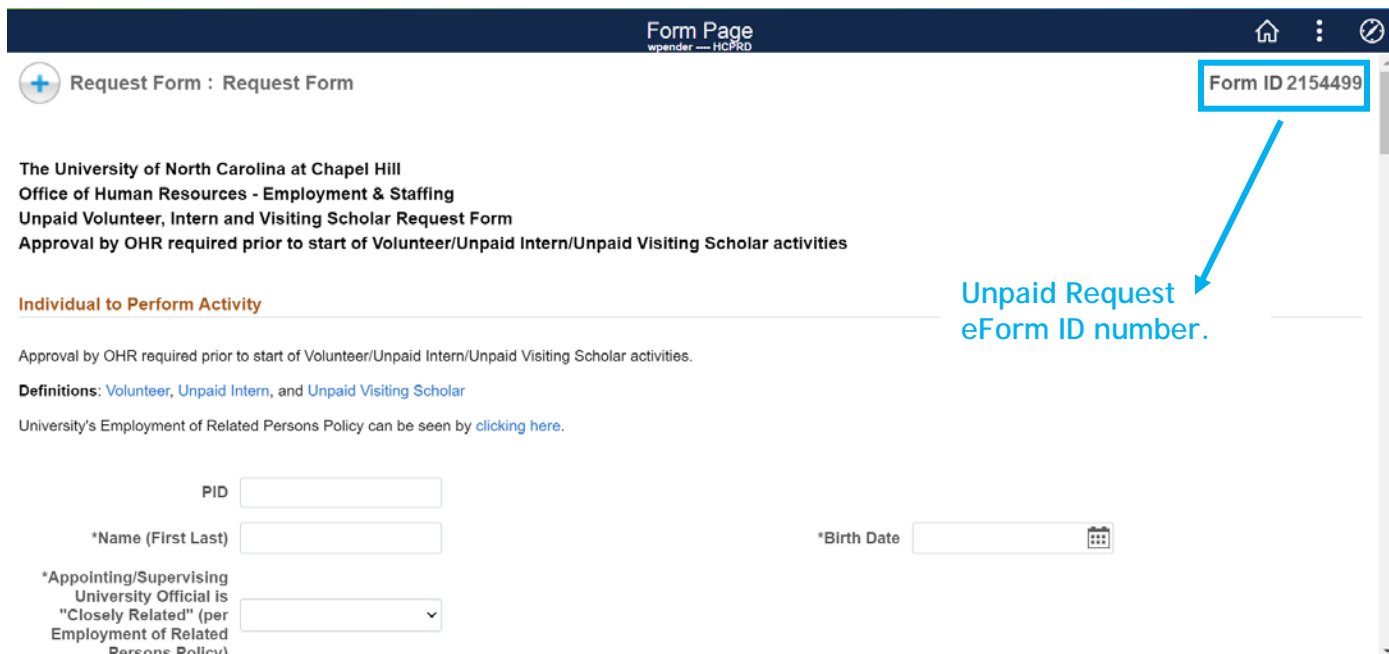
Enter Affiliate's PID and answer all other questions.

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.

*PID	123456789
Name (First Last)	Ramses Ram
*Birth Date	01/15/1983
*Appointing/Supervising University Official is "Closely Related" (per Employment of Related Persons Policy)	No
*Department is Requesting (select one)	Unpaid Visiting Scholar
*Name of Home Institution	ABC Real Estate Co.
*Country of Home Institution	China
*Background Check Satisfactorily Completed?	Yes
*Background Check Form ID	1234567
*Individual holds a Visa (J-1 or H-1B) sponsored by UNC	Yes
*What country is this work being performed in?	United States

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.

*High School Student working in a lab?   No

The following is an option only and not required.

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.

Duplicate Information below from the following Form ID	[🔍]

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.

Proposed Activity

*Departmen	111111		
*Department Contact	Blue Devil	*Department Contact Email	bluedevil@unc.edu
*Describe Activities and Specify Environment Setting	research on Green building and urban renewal projects in China		
*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 Activites with Either of the Following: (if either are involved, include specifics in description below)

Definitions: Sensitive Populations, Sensitive Facilities and Sensitive Information

*Sensitive Populations	No
*Sensitive Facilities	No
*Sensitive Information	No

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.

Duration and Supervision

*Beginning Date 09/01/2023	*Ending Date 08/31/2024
*Supervisor Name wolf [🔍] Tuffy Wolf	Supervisor Email wolf@email.unc.edu

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.

Next Level Approval

Select the next level reviewer for this request.

*Department Official [🔍]

Next

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.
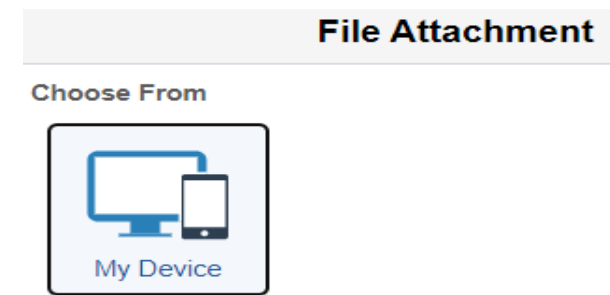
Click Description and choose Release of Liability Form.

Instructions

The Visiting Scholar is required to sign the relevant Acknowledgment and Release of Liability for Visiting Scholar form prior to or on the Beginning Date. Once signed, please upload the Acknowledgment and Release of Liability. If the form is completed prior to submission it can attached below using the Add button and selecting the Release from the dropdown. If the Release is not completed prior to submission the form will route back to the initiator to obtain the attachment after the applicable approvals are complete.

File Attachments

1

Status	Action	Description ◇	File Name ◇	Delete
1	Upload	[dropdown]		Delete

Add

Next click Upload.

Instructions

The Visiting Scholar is required to sign the relevant Acknowledgment and Release of Liability for Visiting Scholar form prior to or on the Beginning Date. Once signed, please upload the Acknowledgment and Release of Liability. If the form is completed prior to submission it can attached below using the Add button and selecting the Release from the dropdown. If the Release is not completed prior to submission the form will route back to the initiator to obtain the attachment after the applicable approvals are complete.

File Attachments

1 row

Status	Action	Description ◇	Instructions ◇	File Name ◇	Delete
1	Upload	Release for Unpaid Visi ▾	If the 'Individual to Perform Activity' section on the previous page was listed as a non-minor based on their date of birth and the request type was an Unpaid Visiting Scholar the Release for Unpaid Visiting Scholars will be available to attach but will not be required. If an attachment is not provided upon submission, then after TAP review the form will route back to the initiator to attach the release on or prior to the hire date.		Delete

Add

The File Attachment box will appear.

File Attachment

Choose From

My Device

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

Choose From

My Device

Upload   Clear

Jie Lin Release Form.pdf
File Size: 195KB
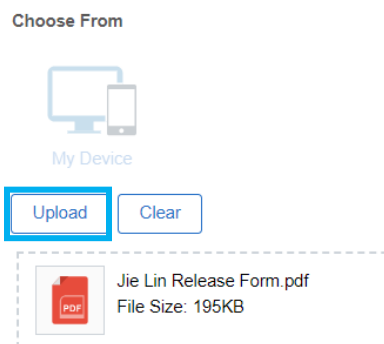
Your document name will appear on the screen.
Click Upload.

Click Done

File Attachment	Done

Choose From

My Device

Jie Lin Release Form.pdf
File Size: 195KB

Upload Complete

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.

File Attachments

Attachment Uploaded	Action	Description ◇
1 ✔	View	Release for Unpaid Visi ✔

Add

▼ Comments

Previous   Submit

The Confirmation Screen will appear. It will provide you with the Unpaid Request Form ID number.

➕ Request Form : Confirmation   Form ID 1112223

You have successfully submitted your eForm.
The eForm has been routed to the next approval step. Diana Devereaux.
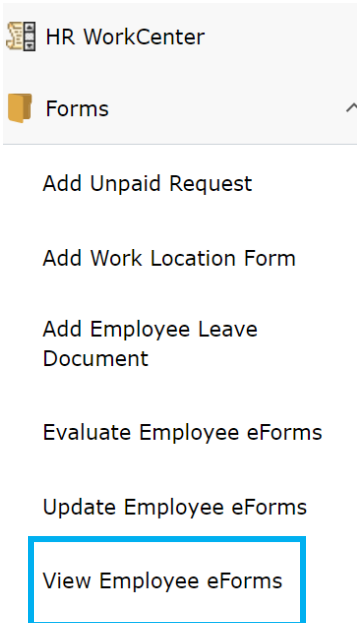
View Approval Route (Add Ad Hoc Approver)

Transaction / Signature Log   1 row

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	04/06/2023 11:48:55AM	Initiated	wpender	Wendy Pender	Submit	

Refresh Log

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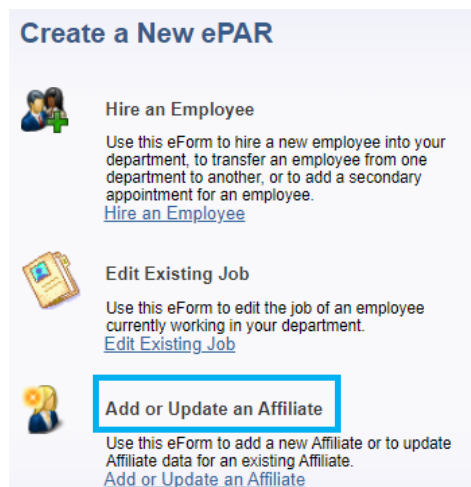
In ConnectCarolina, under HR WorkCenter, Click ePAR Home Page. Click Start new ePar.

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.

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.

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

No attachments are required.
Click Affiliate BGC box.
Enter comments – same as Describe Activities Box.
Click Submit.

File Attachments

	Upload	View	Description	Doc ID	
1	Upload	View	[ ] 🔍		Delete

Add File Attachment

Form Messages

		Message Text	Description	
☑	⚠	Affiliate Background Check	I certify that, where policy requires it, I have received notice from the Office of Human Resources that a background check has been completed for this individual. In the comments section, I have included the background check file number, or a justification as to why the number is not required.	ⓘ

Comments

Your Comment:

Affiliate status is ending, per department request. Scholar was unable to secure funding extension. wp

<< Previous   Submit

<< Search   Close

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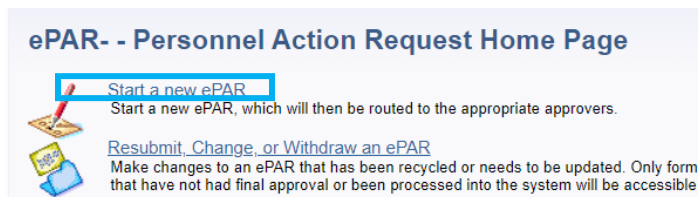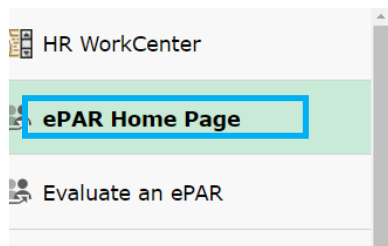
Under Create a New ePAR, click Add or Update an Affiliate.
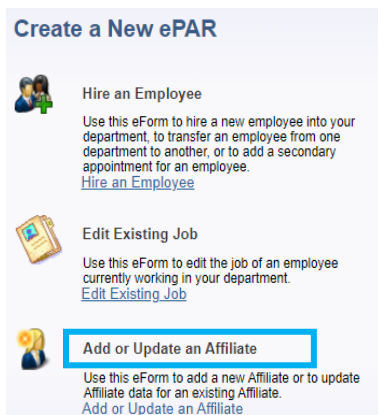
On the Affiliate Lookup screen, enter the PID and click Search.

Affiliate Lookup

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

*Empl ID	= ▾	12345678 🔍
Name	begins with ▾	🔍
Last Name	begins with ▾	🔍
Date of Birth	= ▾	📅
Address	begins with ▾	
City	begins with ▾	
State	begins with ▾	
Postal Code	begins with ▾	

☐ Case Sensitive

[Search] [Clear]   Basic Search 🖳 Save Search Criteria

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

Add or Update an Affiliate   *Authored by*

Step 1 of 1: Affiliate Data

▼ Affiliate Information

Name: Ramses Ram   **Empl ID:** 12345678   **eForm ID:** 1842793

Date of Birth: 01/01/1985   Independent Contractor
Address: UNC Campus, Chapel Hill, NC 27599 Intern
                                                      Other Affiliate
                                                      Other Contractor/Consultant
Sponsor Department: [   ] 🔍   **Affiliate Type:** Preceptor
File Attachments   Research Collaborator
                                                      Retiree

	Upload	View	Description	Doc ID	Student Grants PI
1	Upload	View	[ ] 🔍		Summer Group
					UNC Trustee

[Add File Attachment]   US Envir Protection Agncy
                                                      University Temp Svcs Employee
                                                      Visiting Scholar

The Affiliate Details will populate with the affiliate's current start and end date.

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<u>Types of Updates:</u>

<u>End Date Change</u>:
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.

<u>Inactive Affiliate:</u> 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.

<u>Affiliate has passed their maximum allotted time for the affiliate type:</u>
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 Details		
Affiliate Start Date:	12/01/2022	Add New Entry
*Affiliate End Date:	12/01/2022	
Affiliate Status:	Inactive	

<u>Affiliate is receiving a second affiliate status within the same department:</u>
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 Details		
Affiliate Start Date:	12/01/2022	Add New Entry
*Affiliate End Date:	12/01/2022	
Affiliate Status:	Inactive	

<u>Affiliate has already been entered into the system and is active, but the start and end dates need to be changed:</u>
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.

Unpaid Request Form for   has been Submitted

E   employment@unc.edu
   To ○

↩ Reply   ↩ Reply All   → Forward   ⬛ …
Thu 4/6/2023 11:49 AM

Start your reply all with: [Thank you!] [Resubmitted. Thank you.] [Just got this.] ⓘ Feedback

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

Unpaid Request Form for '   Approved

E   employment@unc.edu
   To

Start your reply all with: [Thank you!] [Resubmitted. Thank you.] [Thank you very much!] ⓘ Feedback

This email is notification that the following Unpaid Request Form was approved.

Form ID:

Employee: '
Department:

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

AP   AUXS - PID Administration
   To ○

↩ Reply   ↩ Reply All   → Forward   ⬛ …
Tue 4/27/2021 1:59 PM

ⓘ You forwarded this message on 4/28/2021 3:46 PM.
We removed extra line breaks from this message.

Wendy Pender,

Affiliate Request Action #   has been approved and the corresponding ePAR has been completed.
_____]'s PID is   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.

Affiliate	Definition	ONYEN?	Email?	Library?	One Card Eligible?	Preffered Time Limits
Campus Ministries / Hillel	Ministers and staff of Campus Ministries, Campus Crusades, and NC Hillel.	Y	Y	Y	Y	1-2 years max.
Carolina Club Employee	Employees of the Carolina Club.	Y	Y	Y	Y	5 year max.
Carolina Dining Employee	Employees of Carolina Dining Services.	Y	Y	N	Y	1-2 years max.
EHS Associate	Affiliates that need to take Environmental, Health & Safety training and are not paid through a UNC department.	N	N	N	N	5 year max.
External Employee	Employees whose department's budget does not fall under payroll, but have a close affiliation.	Y	Y	Y	Y	5 year max.
Emeritus Faculty	Retired from a paid faculty position in the department.	Y	Y	Y	Y	10 year max.
Fellow - Unpaid	Affiliates that are receiving funding from an external fellowship and are working with Carolina.	Y	Y	Y	Y	5 year max.
US Envir Protection Agncy	Employee of the US Environmental Protection Agency working on campus or require access for IRB studies.	Y	N	Y	Y	5 year max.
Other Affiliate	A person who does not fit into any of the other categories. (should be rarely used)	Y	Y	Y	Y	1 year max.
Research Collaborator	An individual who is collaborating on UNC department or UNC faculty driven research.	Y	Y	Y	Y	5 year max.
Retiree	Retired from a paid position in the department.	Y	Y	Y	Y	10 year max.

UNC Trustee	A UNC Board of Trustee member	Y	Y	Y	Y	TBD by the Office of the Chancellor. Max 5 years
Visiting Scholar	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)	Y	Y	Y	Y	TBD by OHR; Max 5 years
Volunteer	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)	Y	Y	N	Y	TBD by OHR; Max 2 years
Independent Contractor	A person not working for a company, but independently under contract with the University. (See UNC F&A for changes in Policy)	Y	Y	Y	Y	2 year max.

Intern	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)	Y	Y	Y	Y	TBD by OHR; Max 5 years
University Temp Svcs Employee	A temporary employee through University Targeted Staffing.	Y	Y	Y	Y	1 year max.
Other Contractor/Consultant	Employed or paid by an external company or source.	Y	Y	Y	Y	1-2 years max.
Summer Group	A group that is only on campus for part or all of the summer, but are not students of the University.	Y	Y	Y	Y	1 year max.
Friday Center Staff	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.)	Y	N	N	N	5 years max.
Preceptor	A practicing professional who gives personal instruction, training, and supervision to a student or young professional. (not Med or Dental)	Y	N	Y	N	1-2 years max.

Committee/Board Member	A person who is serving on a Committee or Board (not Board of Trustees)	Y	Y	N	N	5 years max.
Emergency Official	External Emergency Officials who need access to the Campus Alert System.	Y	N	N	N	5 years max.
AHEC Affiliate	AHEC professionals needing access to the AHEC system housed at Carolina.	N	N	N	N	5 years max.
Student - Grants PI	Current students who need finance access because they are also Primary Investigators for a grant	Y	Y	Y	N/A	1 year max.
Hospital Associate	A staff member who is paid by the hospital, but works on the University side and needs University resources.	Y	N	Y	Y	1 year max.