

Arts & Sciences Managers' Meeting Minutes  
March 8, 2017

**Speakers**

Andy Lang  
*Director, OASIS*

Del Helton

Lachonya Williams  
*Associate Dean for Human Resources*

Whitney Baker  
*Senior Budget Analyst*

Laura Yurco  
*Assistant Dean for Finance*

**Office 365 Overview  
– Andy Lang**

- The entire University will be transitioning to Office 365 for email service.
- This service will provide 50GB of storage, more than is currently available.
- The College will be migrating on the following dates: April 3, April 10, and April 17
- ITS will do a copy of the inboxes a week before the scheduled migration. On the night of migration, ITS will copy emails received since the first back-up as well as any that are received during the migration.
- Users should stay off email during the transition and Outlook web access will not work during the migration. After the migration web access can be accessed via <http://heelmail.unc.edu>.
- ITS/OASIS will be sending out information on configuration for desktop applications and mobile devices.
- Help Desk will be able to help with migration problems and anticipating users with issues and are prepared accordingly.
- *Please see enclosure regarding more information about the migration to Office 365.*

**Stewardship  
Overview – Del  
Helton**

*Please see enclosure regarding the stewardship process, as well as tips for good endowment stewardship.*

**Finance  
Announcements**

**Contract & Grant Training Updates:**

- Thank you to those who given feedback to Whitney regarding Contract and Grant topics that would be most helpful.
- We hope to have our first reference document going out in early April with an anticipated first wave of training soon after.
- The training being developed will be easy to reference, including for PIs and will go on the website as a special section (separate from the Did You Knows that are already on the web).

**F&A Requests:** Thank you for everyone working so diligently to complete the F&A requests and getting those in on-time. We will be contacting a handful of departments to meet and delve deeper into the details of these reports.

**New Employee Detail for Payroll-Related Allocations:** Regarding Memo to Managers listserv 3/1/17 titled “New Employee Detail for Payroll-Related Allocations” starting March 1, 2017, reports will start showing individual transactions for each employee for these fees and charges (core data fees, campus transit fees, composite benefits, severance wage transactions). These fees are self-adjusting for PAAT transactions. The process debits the fee expense to the new PAAT chartfield string and credits the corrected chartfield string. Therefore, you no longer need to make correcting entries for these charges as part of a PAAT transaction or a Campus Journal entry!

**Graduate Student Health Insurance Program (GSHIP):** Regarding message sent to Managers listserv 2/23/17 titled “Graduate Student Health Insurance Program (GSHIP) Premium Administration” Effective immediately, department users may now update GSHIP chartfields before journals are created for the month (25<sup>th</sup>) and will stay for the rest of the term.

**Subscribing to Business Managers listserv:** We encourage everyone to sign-up for the University Business Managers Listserv. Those who would like to subscribe to the business managers listserv can do so by following the instructions at <http://finance.unc.edu/files/2016/09/joinbusinessmgr.pdf>.

## HR Announcements

### **Background Checks:**

The background check unit announced some changes to the background check guidelines, effective April 3<sup>rd</sup>:

- The validity period for the background check will be six months.
- Checks will only go back seven years per location, instead of to the age of 18.

More communication will be coming soon. Noreen Montgomery and members of the background check unit will be presenting at the May manager’s meeting.

### **Viewing and Updating Federal and State Income Tax**

Effective April 3, **SHRA employees** will no longer complete paper Federal and State Income Tax withholding forms (W-4 and NC-4 forms) during New Employee Orientation. New employees will be directed to complete their tax forms using the online forms available for viewing and updating on the Self Service menu on the ConnectCarolina home page. Self Service within ConnectCarolina will allow employees to almost instantaneously update their Forms W-4 and NC-4 and receive an email confirming any changes. Paper forms will still be accepted.

Exceptions are only for the following employee types, who must complete appropriate paper forms. These can be downloaded and printed at:

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

- individuals filing for North Carolina tax exemptions (those using form NC-4 EZ)
- employees who reside and work in a state other than North Carolina

- nonresident aliens

### **New WorkWell Monthly HR Digest**

Everyone should have received the new monthly digital newsletter called *WorkWell*. Each month, OHR will provide UNC employees (faculty and staff) updates related to professional development opportunities, benefits, upcoming events and other need-to-know information.

### **Retroactive Reports to HR Officers**

Beginning this month, campus HR Officers will be provided a list of actions that were submitted using retroactive dates that may or may not have resulted in overpayments. This report is designed to assist schools with identifying units and/or individuals that may need additional training. Should a particular unit and/or individual continue to submit retroactive dated actions, it could result in future access restrictions. While it is understood that sometimes these are out of your control, these reports are meant to minimize the volume of these types of actions.

What will help minimize retroactive dated actions is to run your end date reports or respond to your HR Specialist when they send out the end date reports. Keep in mind that if you need faculty votes on appointments, you will need to plan ahead to accommodate your faculty meetings.

### **ULEAD:**

Please spread the news that applications for ULEAD 2017 are now being accepted. You are welcome to share the attached description of this year's program. Detailed information and the application form are on the UNC Human Resources website:

<http://hr.unc.edu/training-talent-development/specialized-programs-and-resources/ulead/>

Applications will be accepted through March 21. Everyone is welcome to contact me at [will\\_frey@unc.edu](mailto:will_frey@unc.edu) or 919-962-9685 with any questions.

### **EHRA EMPLOYEES:**

#### **July 1<sup>st</sup> New Hires:**

For tenure-track hires, effective 7/1/17, please communicate with Janet and Teresa, if we haven't yet received the dossier in our office to make sure that there is time to accomplish the appropriate routing.

### **Transcript Collection**

We are about 75% through the process of collecting faculty transcripts to comply with SACSCOC requirement. As you are aware, there were some Individuals whose institutions do not participate in the two clearinghouses that were provided to us by the Academic Personnel Office. You should have already been notified by Jocelyn Brooks or Dianca Sutton of who those individuals are. Please continue to work with your faculty to obtain their official transcript. Should you have questions please reach out to Dianca Sutton or Ashante Diallo

### **Updated Standard Order Tables**

The Academic Personnel Office (APO) has updated the standard order tables for all fixed term faculty appointments. The primary update includes the collection and submission of an official transcript as part of the standard order for initial appointments. The standard order table for tenured and tenure track faculty is underway, however it will include the same requirement. Please keep this new mandate in mind as you begin to engage new employees.

**Change for Postdoc Trainees/Research Associates**

Departments are no longer required to send salary increase requests for Postdoc Trainees (Job Code 800175) or Postdoc Research Associates (Job Code 800176) to the Office of Human Resources when the two following conditions are met:

- 1) The proposed salary increase is based on labor market or occurs at time of reappointment **and**
- 2) the proposed salary does not exceed the established stipend amount for the employee's career level. This change applies to all postdocs regardless of fund source.

Departments will still need to send the completed rainbow form to your assigned Human Resources Consultant in the Dean's Office for review and approval. However, no additional approvals from OHR are needed, as long as the above criteria are met.

**SHRA EMPLOYEES:**

**Performance Management Process**

Any day now, we are expecting to receive communication from OHR-Employee & Management Relations on the process for ending the 2016-17 performance cycle (March 31<sup>st</sup>) and beginning the 2017-18 cycle (April 1<sup>st</sup>). Ratings for the current cycle will be due in ConnectCarolina no later than April 30<sup>th</sup> and can only be submitted by the employee's supervisor. OHR will provide hands on training to all supervisors as it relates to submitting your employee's ratings, as well as completing performance goals for the new performance cycle.

The toolkit for performance management can be found here:

<http://hr.unc.edu/policies-procedures-systems/spa-employee-policies/performance-management/performance-management-toolkit/>