College of Arts & Sciences Managers' Meeting

Wednesday, April 10

10:30 a.m. – 12:00 p.m.

Toy Lounge, Dey Hall

1. **Welcome:** Ashante Diallo, Senior Director of HR Shared Services

2. **Finance Announcements:** Manish Kumar, Associate Dean for Finance and Budget Management

   a. **Annual Report** – please make sure all faculty are completing their annual report. Upcoming deadlines:

      i. Faculty to complete annual report – Monday, May 13th

      ii. Deadline to add activities in Stewardship – Friday, May 10th

      iii. Deadline for position requests – Friday, May 10th

      iv. Deadline to complete the Annual Report – Friday, May 31st

      v. Upcoming Stewardship Help Session on April 24th in Manning Hall Library from 1pm to 3pm. A doodle will be sent out to sign up for a designated time.

   b. **Suspense clean-up** – due to year end approaching, please make sure to continually check your suspense chartfield. Please move all charges to their appropriate chartfield string by processing PAATs and/or funding swaps. For credits & fringe adjustments, please reach out to your Budget Analyst.

   c. **Trust cash deficits** – due to year-end approaching, please make an effort to clear your trust cash deficits. Please reach out to your budget analysts for any questions you may have.

   d. **Upcoming Research Administration Training Opportunity**

      i. A 3.5-hour joint training session with OSR and Business Operations research administration staff will take place on April 24.

      ii. Training objectives include providing a basic knowledge of research administration and UNC policies, identifying common sponsoring agencies, understanding the differences between types of sponsored funding, understanding uniform guidance, and reviewing federal acquisition policies. The session will also explore proposal preparation,

sponsored project budgeting, university and sponsor-specific submission portals, and award notification procedures.

    iii. Registration is required; please refer to Mark Richardson's 3/29 email for a registration link and additional information.

    iv. Seats in the course are quickly disappearing, but don't worry – identical training sessions will be offered again in the near future.

e. **New Purchasing Card Allowable Charges:**
    i. In-dining restaurant charges are now allowable on a p-card, however, please note that all *alcohol* charges continue be prohibited – even when a part of an in-dining meal.
    ii. For more information, see the [March 29 memo](#).

f. **Securing Domestic Vendor documentation**
    i. When setting up a new vendor or changing a vendor, the only methods for requesting sensitive information, such as bank account numbers for direct deposit or SSN information on form W-9, *should be by <u>US mail or fax</u> to the requesting department.*
    ii. Departments must **not** request that suppliers return ACH information for form W-9 *via an **<u>outside</u> (non-UNC) email***
    iii. Students, study subjects, affiliates, and other individuals including- independent contractors are not required to provide ACH banking information unless they choose to do so.
    iv. These policies pertain to domestic vendors, not foreign vendors. As of right now, you can continue to receive foreign paperwork as before. The central Vendor Coordinator team realizes that processing paperwork for foreign vendors presents unique challenges.
    v. For more information, see the [March 19 memo](#).

3. **HR Announcements:** Ashante Diallo, Senior Director of HR Shared Services

HR Lunch & Learns
April Lunch & Learn will be held on **Monday, April 29th** in **205 Howell Hall** from **12 noon – 1:00pm.** This month's topic is **"H1-B Visa Application Process"**. The **May Lunch & Learn** topic will be on **May 21ˢ, 12-1 p.m**. and will be on the "**EB-2 Visa Application Process".** More information on this session will be sent soon but is on our College website.

Award in Management Luncheon is scheduled for Wednesday, April 17th at noon at the Carolina Inn. If you haven't already, please RSVP to either Adrienne Jeffries, adrienn@email.unc.edu or Karl Pfister, pfister@email.unc.edu no later than Wednesday, April 10th.

UPDATE: SHRA Performance Review and Employee Competency Ratings
As a reminder, all performance ratings and employee competency ratings have to be submitted in ConnectCarolina no later than April 30th. In addition, all signed copies of actual PMCA documents for Managers should be sent to your assigned HR Consultant, Adrienne Jeffries or Karl Pfister.

REMINDER: Performance Feedback for Dean's Office Staff
An email was sent out from Lachonya Williams a couple of weeks ago requesting performance feedback for the Dean's Office Staff. If you haven't already done so, please use the links provided in the email no later than Friday, April 12th. Your feedback is valued and appreciated.

REMINDER: Graduating Students
Any graduating students that will perform work over the summer will need to be hired as an SHRA temp or fixed term faculty. This will mandate a recruitment and background check, as well as an I-9 verification (if there is a break in service of 1 or more days)

REMINDER: EHRA Student Work Break/Reappointment Timing:
As a reminder, the EHRA Student auto-term process now runs throughout the month.
- From the 1st through the 14th of the month it will run daily and terminate any EHRA Student with an Expected Job End Date of that day or before.
- On the 15th and continuing through the end of the month, anyone with an Expected Job End Date within the current month will be terminated.
- Auto-terminations will not occur during payroll lockout.
- The auto-term process runs around 1am.
- A student will not be auto-termed if there is an ePAR in progress for that Empl Record.
- Make sure that you have the appropriate end dates.

REMINDER: Expected End Date Report
- In order to avoid overpayments, it is important to monitor the expected end dates of your employees. The Expected End Date Report in InfoPorte is a tool that you can use to help manage this process. The filter defaults to reflect Primary jobs only. In order to return both Primary and Secondary jobs, clear the Primary/Secondary job filter by selecting **Clear Filter** from the drop-down options.
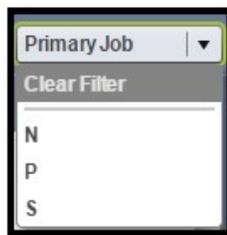
REMINDER: Permanent Fixed Term Faculty New Hires
As part of the standard order, two outside (2) letters of recommendations are mandated with perm fixed term faculty hires. In addition, although we have 6 months to submit transcripts, we highly recommend that they be submitted with the standard order.

REMINDER: Lump Sum Payments (LSP) for Students
As a reminder, LSP is not a method we can use to pay students. The only exception is for courses taught through the Office of Summer School, Self-paced and Correctional Instructional Courses through the Friday Center.

REMINDER: New Faculty Hires
The hire does not stop with the approved hiring proposal. Please make sure that your HR Business Partner is aware that the candidate accepted the offer and that you submit the necessary information to close out the recruitment (non-selection reasons to assist with the disposition of candidates, background check requests and standard order documents)

REMINDER: Faculty Leaves
Please remember that a completed and signed Faculty Leave Notification Form must accompany all leave requests. It is important that a robust explanation is provided for the purpose of the leave. "Research" or "Writing a book" cannot be used as an explanation. The form can be found here, on the APO website.

Direct Deposit
You can now manage your direct payroll deposit accounts using Self Service in ConnectCarolina in a secure and convenient way. By using two-step verification and ConnectCarolina' s self-service menu, you can change your direct payroll deposit account information and split your direct payroll deposit into multiple accounts online.

Please reference the formal notice email that was sent out on Friday, April 5th to review additional information about this new feature in ConnectCarolina.

ConnectCarolina Makeover Coming in May:
Have you heard that ConnectCarolina is getting a makeover? Besides looking better, the new look will reduce clicks and give you more options for navigating. Please see the ConnectCarolina Makeover Video for a sneak peek of what's to come! The best way to stay up-to-date is to sign up for the ConnectCarolina newsletter at ccinfo.unc.edu/newsletter and visit the ConnectCarolina Makeover page on ccinfo.unc.edu.

4. **Carolina Courses Online Pilot Expansion:** Ashante Diallo, Senior Director of HR Shared Services

   Due to a decline in self-paced online courses, the CCOPE group has been working with 5 departments on piloting a new process to encourage higher enrollment for online courses. A doodle poll will be sent out to those who are teaching CPO classes in the fall to discuss what's changing, where we are, and what to expect in the future.

5. **Campus Working Group Report Outs:**

   a. Budget Working Group – A budget template is still underway. Once completed, the budget template will be used to facilitate base and change budget identification, including commitments.

   b. Employee Forum –Shayna Hill, the new department Manager for STATS and OR, is now the chair of the Employee Forum. The Forum recently passed the resolution "that the University does not unlawfully discriminate in offering equal access to its activities with respect to employment terms and conditions on the basis of an individual's age, color, disability, gender, gender expression, gender identity, genetic information, race, national origin, religion, sex, sexual orientation, or veteran status, collectively referred to as "Protected Status."

   c. Operational Excellence – Carolina Excellence has been rebranded as Operational Excellence.

i. Finance Early Impact **-** Mark Richardson is working directly with Chase Debnam in Psychology on finance early impact trainings. This training is particularly focused on the most appropriate and effective procurement efforts on $250.00 or less. This initiative will be live next week (the College is in cohort #2). Mark and Chase are working on specific goals and tools to initiate change within all departments. The first round of training will be targeted at Managers' who are served by the finance shared services team. Stay tuned for further information about upcoming trainings.

ii. HR Early Impact – Carolina Hiring Playbook – The College is in cohort # 2. The Carolina Hiring Playbook is a new tool created to help HR representatives, hiring managers and other members of the Carolina community navigate our improved hiring process for permanent, non-faculty positions (SHRA and EHRA non-faculty). The Playbook will continue to be updated to reflect policy changes and incorporate further improvements. You can always find the latest version [here](#).

iii. Roles & Responsibilities- This team is working to clarify roles and responsibilities across HR, Finance and Research Administration. This team will work to improve role clarity, collaboration and governance. And their work will build on the early efforts in hiring and procurement initiatives and support the work to improve the research project lifecycle.

d. OSR Working Group -

o Please do NOT use account code 558914 on sponsored projects due to compliance, [Sheri Olson](#) and [Yiwen Wang](#) can help with questions on appropriate account codes.

o Contractor Travel expenses incurred for work done for NC while stationed out of state will follow NC state travel policy.

o There is also discussion on how to go about capturing effort at the proposal stage, but it was noted that budgets change during the proposal process. Stay tuned.

o RAMSES reporting is going to SAS soon, users can export to excel and modify report for user convenience.

e. Red Tape Working Group – No updates during this time.

6. **Questions**

7. **AMAC Breakout Sessions**

Setting up Direct Deposit and Changing Account Information

Direct Deposit is the required payment method for all University Employees and can be set-up electronically through ConnectCarolina. To set up Direct Deposit, log in to ConnectCarolina with your ONYEN and password and click **Direct Deposit** under Self Service. Employees must have Duo 2-Step enabled to access **Direct Deposit**.

Setting up Duo 2-Step

To access Direct Deposit in ConnectCarolina employees must have activated **Duo 2-Step Verification**.

1. Open Google Chrome or Firefox and navigate to https://onyen.unc.edu.

2. Click **2-Step Verification for Duo**

3. Submit employee verification information: **PID**, **Last 4 digits of SSN**, **Employee birthday**

If you do not have a Social Security Number (SSN) enter your PID, birthday, and answers to three Security Questions.

4. It is recommended to use 2-Step Authentication with a smartphone and the Duo App. Download the free app from the App Store or Google Play Store.

5. From the "What Type of Device Are You Adding" screen, select **Mobile Phone**

6. Choose the country associated with your mobile phone

7. Enter your phone number

8. Click **Continue**

9. Choose the operating system of your mobile device
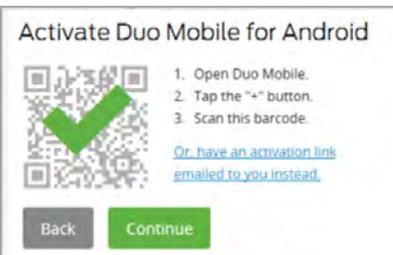
10. Click **Continue**

11. Open the Duo Mobile Application on your mobile device

12. Click the + button

13. Scan the barcode

14. Choose how you would like to be notified and click **Finish**

15. For help on setting up other devices go to https://help.unc.edu/help/duo/

Setting Up Direct Deposit

1. Open Google Chrome or Firefox and navigate to https://connectcarolina.unc.edu/

2. Click **Log in to ConnectCarolina and InfoPorte**

3. Click **Self-Service**
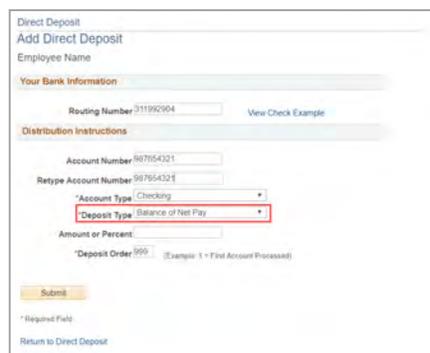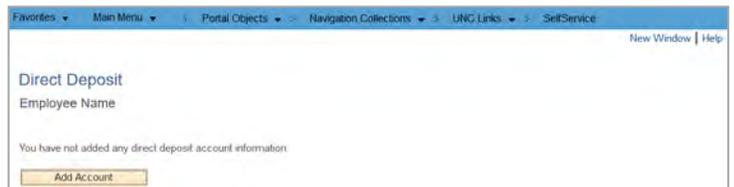
4. Click **Direct Deposit**

5. Log in with Duo 2-Step Authentication

6. Click **Add Account**

7. Enter in the Routing Number and Account Number for the **Savings or Checking Account** you wish to use

8. *ConnectCarolina will check for correct Routing Numbers but not correct Account Numbers. Please doublecheck that you've entered your account number correctly in both fields.*

9. Select **Balance of Net Pay** for Deposit Type

Making Changes to Direct Deposit Account

To make changes log in to ConnectCarolina and Direct Deposit

- **Note:** ConnectCarolina requires you to have at least one account set up, so if you only have one, you'll need to change it rather than deleting it and then adding another account.
- Click **Edit** to change Routing and Account Numbers

ver 04012019

Example Check

Ramses
Kenan Memorial Stadium

9999

:999999999: :999 999 999: 9999

Pay to the Order of

1   **2**

1 - Routing Number

2 - Account Number

Account Types Supported

Direct Deposit at UNC supports only savings and checking accounts at US credit unions and banking institutions. Money market, 401k, and brokerage accounts are **not** supported by Direct Deposit. Routing numbers for these accounts will not be accepted by Direct Deposit.

All UNC Employees should have a valid US checking or savings account to use with Direct Deposit.

Glossary

Routing Number: the nine digit code for your bank (1)

Account Number: your specific account number (2)

Deposit Types: Denotes how pay is split between accounts

Balance of Net Pay: Denotes that this account will receive the leftover amount of your paycheck after applying percentages and amount rules. All employees should have a balance of net pay account. This is also the account reimbursements from accounts payable will be sent to.

Percent: Denotes that this account will receive a specified percent of your paycheck. When using percent ensure that all accounts represent 100% of a paycheck and that one account is set to accept Balance of Net Pay.

Amount: Denotes that this account will receive a specific amount of your paycheck. When using amounts include one account set to accept Balance of Net Pay.

Deposit Order: The order in which employee's paycheck is deposited into their accounts. Each account/action must have a unique priority number. The balance of net pay account with deposit order 999 will be used for reimbursements.

Duo 2-Step Authentication: A verification method to secure online access to sensitive information. Upon logging in users are sent a secondary login push or code to a separate device.

Additional Resources

Duo 2-Step Authentication Set Up Guide: https://help.unc.edu/help/duo/

Duo 2-Step Authentication User Video: https://youtu.be/3Bfi57RP4LM

Onyen Online Services: https://its.unc.edu/onyen-services/

Multiple Account Set up Direct Deposit QRC: https://go.unc.edu/multiple-deposit-guide

FAQs on Direct Deposits http://go.unc.edu/directdeposit

For additional Help contact 962-HELP or visit help.unc.edu