College of Arts & Sciences Managers' Meeting

Wednesday, February 10, 2021

10:30 a.m. – 12:00 p.m.

Zoom

[Recording](#)

Welcome - Julia Lisuzzo, Senior Director of Accounting Services

Dean Terry Rhodes - Check in

Thank you to all the managers for everything they do on a daily basis, dealing with all the challenges being thrown around at this time. Terry urged the managers to take advantage of the wellness days and to spread the word to their staff as well.

GradStar Award Update - Beverly Wyrick, Director of Finance and Administration for the Grad School

[Presentation](#)

Student Payments Review – Research found that there are payments being made appropriately through GradStar, and some inappropriately through vouchers. This puts the university out of compliance with regard to capturing all financial aid, so a decision has been made to review all student payment types to ensure compliance with federal and state regulations, as well as university policies.

Currently, there are key contributors, including representation from the College, making up several working groups that will take a look at taxation issues, campus, training grant payments, non-training grant payments, and travel payments.

This will result in the following; the creation of a Student Payment Policy Handbook and training materials, clear defention of payment types, updates on the GradStar User guide and online modules, additional award types, review of proration of tuition and fees and more communication to campus.

College of Arts & Sciences
Synergy Unleashed

Most awards entered into GradStar will be counted as financial aid. A student's financial aid eligibility is capped at the cost of attendance for federal aid recipients and may be capped for other students based on campus policy. The cost of attendance is the estimated amount of educational expenses for a period of enrollment for which the students has applied. All non service funding falls under this cap. Federal aid can be reduced should a student receive departmental awards. The COA can be reviewed on a case-by-case basis and increased if deemed appropriate by OSSA.

There are several deadlines approaching, please review the attached presentation for more details.

Graduate Student Tracking Hub - Dr. Andy Lang, Associate Dean of Information Technology and Data Analytics

Student tracking tool – Is a tool in PeopleSoft (ConnectCarolina) that has two major functions; the first is to consolidate the number of places people who work with grad students need to go to find out information about their respective students, and also to provide a sustainable and centralized resource that managers can record pertinent information for the department they are in. It is accessible to anyone with a 'student services manager' role in PeopleSoft and appears in the Admin Work Centre part of ConnectCarolina.
This tool originated from discussions with departments, where it was found every unit had its own way of stewarding these data, from excel spreadsheets to filing cabinets to access databases, etc.; so we setup a focus group to design a better system, and this is the result.
While the main goal is to make a useful tool available as quickly as possible, it is not a finished product, and it will continue to evolve in functionality as we get feedback about new features, etc.

Finance Announcements - Julia Lisuzzo, Senior Director of Accounting Services

Joe Daley - Salary savings transfers: Departments should begin moving faculty salary savings from the main State fund (program 10000) to the Instructional Budget (program C1302).

Start-up reallocation: Departments should begin working with faculty members to adjust fiscal year 2021 start-up budgets. This includes reallocating between personnel and non-personnel funds in the current year as well as moving funds out to future years. If a faculty member's start-up is expiring this year and they

need more time to spend down the package, you can request an extension through your department's budget analyst.

More details about each process and the fiscal year 2021 deadlines will be sent out via email. Please contact your BA with any questions about either process.

HR Announcements - Ashante Diallo, Associate Dean for Human Resources

[Using and Saving Filters](#)

[Downloading Data Tableau](#)

HR Lunch & Learn – The March Lunch & Learn topic will be **"SHRA Performance Management Process"**.   Once the new electronic performance management system is finalized, a date and time for the Lunch & Learn will be announced and added under the Upcoming Events on the CASBO website.

INFORMATION: Work/Life & Wellness Programs – As part of UNC's ongoing commitment to the health and wellness of employees, the University offers a variety of programs focused on healthy lifestyles and balancing the responsibilities of work and personal life. Please visit the [Work/Life & Wellness Programs](#) website for more information, resources and webinars.

REMINDER: EHRA Overload Pay Request Form – As a reminder, when requesting approval to compensate EHRA employees for activities outside of the scope of their full-time employment, an [EHRA Overload Pay Request Form](#) must be completed, signed and approved BEFORE the activity begins. Please remember to keep the form in Microsoft Word and **not convert PDF** and submit requests in RASR using the [CASBO Overload – HR Officer Signature Form](#).

For more information about this policy, please visit the [Academic Personnel Office](#) (faculty) or the [Office of Human Resources](#) (EHRA Non-Faculty).

REMINDER: I-9 Verification Open House – The HR staff will host two contactless I-9 Verification sessions each month in order to visually inspect work authorization documents that new employees have uploaded in LawLogix. The sessions this month will be held on Wednesday, February 17th, 9:00 a.m. – 12:00 p.m. and Thursday, February 25th, 1:00 – 4:00 p.m. Please share this information with any new employees that t you have been unable to meet with

REMINDER: Faculty Dossiers – March 15, 2021 is the deadline to submit faculty dossiers for promotions and/or new hires with tenure with a July 1, 2021 effective date.   If you have any questions and/or concerns, please contact Janet Farrell, Janet_Farrell@unc.edu and Teresa Wilkinson, tsmith7@email.unc.edu immediately.

REMINDER: Suspension of non-essential HR Actions – Please be mindful that due to the multi-layered review and approval process for all requests through the Request for Essential HR process, requests can take a minimum of two and up to four weeks to be reviewed and approved. In addition, if your request is related to a recruitment (non-grant funds), position modification, etc. related to any SHRA and EHRA Non-Faculty employees and/or positions, you will need to complete a Non-Faculty Position Request form prior to completing and/or submitting the Request for Essential HR Action form. If you have questions, please reach out to your assigned HR Consultant.

REMINDER: Manager HR Bootcamp Survey – Thank you to all Department Managers that accepted our invitation and participated in a new Manager HR Bootcamp earlier this month. If you haven't already done so, we ask that you please take a moment to complete the survey that was sent via email from Tudor. Once we receive feedback from those that attended, we will make any necessary changes and provide future opportunities to all CAS Mangers.

INFORMATION: Transition of Infoporte Reports from SAS VA to Tableau - As many of you are aware, as of December 31, 2020 Adobe Flash is no longer supported by modern browsers. This meant that that the reports under the 'Reports' or 'Reporting' tabs in Infoporte – created in SAS VA – was affected since the current version of SAS VA utilizes Adobe Flash in report design.

Due to unforeseen issues with a planned installation of SAS VA upgrade, ITS made the decision to move the SAS VA content to Tableau. Although there are many differences in the two systems, the most noticeable are with the fields available for download and the ability to filter data. To provide assistance, ITS created the attached resources, **Downloading Data in TarHeel Reports** and **Using & Saving Filters in TarHeel Reports**. As the end of the year approaches, ITS will continue to provide updates, including a look at the differences in report operation, guides for the new platform, and highlights for the most used reports currently in SAS.   Stay tuned.

Campus Working Group Report Outs:

Employee Forum – nothing new to report.
Finance Functional Redesign – nothing new to report.
Red Tape Committee - nothing new to report.
Finance Functional Redesign - nothing new to report.
Finance Early Impact - nothing new to report.
HR Early Impact - nothing new to report.
OSR Business Managers Advisory Committee - nothing new to report.