WORKING WITH UNIVERSITY AFFILIATES

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AGENDA

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  • Affiliate Types
  • Affiliate Access

• Approval & Forms
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  • Affiliate Forms

• Setting up Affiliates
  • Who can set up an Affiliate?
  • Checking for an Existing PID
  • Affiliate ePAR vs. Affiliate Request System

• Helpful Resources
INTRODUCTION

Who is an Affiliate?

An Affiliate is any person who requires University resources to work in conjunction with UNC-Chapel Hill. Affiliates must have a UNC-CH sponsor. There are more than 20 types of Affiliates, which include:

- Visiting Scholars
- Unpaid Volunteers
- Unpaid Interns
- Independent Contractors*

Who is NOT an Affiliate?

- Anyone paid by University Payroll
- Anyone teaching for UNC-Chapel Hill, for-credit courses
- Anyone enrolled in classes
- UNC Health Care employees

* Independent Contractors (IC) are handled by Finance. If you have questions concerning an IC, please contact your Accounting Technician or Budget Analyst.
AFFILIATE TYPES

The most common Affiliates that our HR Specialists encounter are:

- Visiting Scholars
- Unpaid Interns
- Unpaid Volunteers
- Research Collaborators

Retirees and Emeritus Faculty must go through Ruth Holt (ruth_holt@unc.edu) in HR Benefits.
AFFILIATE ACCESS

• Every Affiliate, except volunteers, AHEC (Area Health Education Center), and EHS (Environmental Health & Safety) associates receives the following access:
  • Onyen
  • Library access
  • Email

• Volunteers do not receive library access

• EHS associates only receive a PID
AFFILIATE ACCESS

• Affiliates are eligible to obtain a UNC OneCard after their application has been approved and/or their Affiliate ePAR has executed. The Affiliate will need to visit the UNC OneCard Office and will need:
  • Valid driver’s license, State ID, Military ID, or passport for identification purposes
  • Their PID number
  • A form of payment for the $5 OneCard fee. If the department would like to pay the fee, please contact the OneCard Office at 919-962-8024
APPROVAL AND FORMS
AFFILIATE APPROVAL

Advanced approval of sponsoring department and OHR is required for Unpaid Volunteers, Interns, and Visiting Scholars. These Affiliates cannot begin providing services until the department receives approval from the Employment Consultant in OHR.

Independent Contractors must be approved by Disbursement Services prior to making any employment commitment or preparing payment vouchers.
AFFILIATE FORMS

Unpaid volunteers, unpaid interns, and visiting scholars require the following forms to be completed:

• Background Check Request
  • Results are sent to Employment Consultant in OHR

• Unpaid Volunteer, Intern, or Visiting Scholar Request Form
  • Submitted to the Employment Consultant in OHR for approval

• Release of Liability Form
  • Retained by the Department, unless the individual is a minor.

The Affiliate Application Form is not required, but it is extremely helpful
AFFILIATE FORMS

Independent Contractors require the following forms to be completed:

- Background Check Request
- Employee/Independent Contractor Determination Checklist (EICDC)
- Individual’s IRS W-9 Form
- Additional forms are required if the total payment in a 12-month period is more than $10,000:
  - Independent Contractor Services Agreement
  - Statement of Work
  - Waiver of Competition
  - Sole Source Letter of Justification
BACKGROUND CHECK REQUEST FORM

• Completed for unpaid volunteers, interns, visiting scholars if the individual:
  • will volunteer for more than seven calendar days
  • is 18 years of age or older
  • will have unsupervised access to sensitive populations or sensitive facilities

• Completed for independent contractors if:
  • the assignment lasts in excess of 10 calendar days
  • the assignment involves a continuous relationship and/or access to sensitive populations or sensitive facilities/data

Sensitive populations: individuals less than 18 years of age, patients receiving care in any clinical setting, or other individuals deemed to require enhanced supervision or protection based on University practice or State or Federal law.

Sensitive facilities: University facilities that require special clearance or background checks for access as well as confidential or protected records.
UNPAID VOLUNTEER,
INTERN, AND VISITING SCHOLAR REQUEST FORM

This form is completed by the department and sent to the HR Specialist in the Business Center or to the Employment Consultant in OHR

- Be sure to describe the research in detail under Describe Activities and Specify Environment Setting section.
- Be sure to include the Home Institution
- The Human Resources Representative signature can be either the Department Manager or HR Specialist

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**PROPOSED ACTIVITY**

- Dept. is Requesting (Check One): [ ] Volunteer [ ] Unpaid Intern [ ] Unpaid Visiting Scholar
- Dept. Name: 
- Dept. Contact: 
- Dept. Number: 
- Telephone Number: 
- Describe Activities and Specify Environment Setting: 
- 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.): 
- Involves Unsupervised Activities With Either of the Following: (If either are involved, include specifics in description below)
  - Sensitive populations: 
  - Yes [ ] No [ ]
  - Sensitive facilities: 
  - Yes [ ] No [ ]
- Description of Sensitive Populations/Facilities (if applicable) (Example: students, patents, study participants, biosafety level 3 facilities (BSC-3) etc.): 

**DURATION AND SUPERVISION**

- Beginning Date: 
- Ending Date: 
- [ ] or Ongoing (volunteers only)
- Supervisor Name: 
- Phone Number: 

**INDIVIDUAL TO PERFORM ACTIVITY**

- Name: 
- Birth Date: 
- If Yes, explain: 
- Appointing/Supervising University Official is “Closely Related” (per Nepotism Policy): 
  - Yes [ ] No [ ]
- Student or Educational Professional Status: 
  - [ ] Student [ ] UNCC Student [ ] Other Student
  - [ ] Home Institution (non-UNC)

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**APPROVAL CERTIFICATION**

- Name and Title of Authorized Department Official: 
- Signature of Authorized Department Official: 
- Date: 
- Name of Human Resources Representative: 
- Signature of Human Resources Representative: 
- Date: 

**OFFICE OF HUMAN RESOURCES USE ONLY**

- Date Received: 
- Date Approved: 
- Employment Consultant: 
- Approved as: 
  - [ ] Volunteer [ ] Intern [ ] Visiting Scholar
  - [ ] Approved as Exception [ ] (Include in justification below)
- Comments: 
- Background Check Submitted by OHR: 
  - Date: 
  - Result: 

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Equal Opportunity Employer
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RELEASE OF LIABILITY FORM

Completed by the department and signed by Affiliate and Affiliate’s supervisor

This form is kept in the department files unless the Affiliate is a minor, in which case a copy of the form is sent to the Employment Consultant in OHR.
# AFFILIATE APPLICATION FORM

This form is not required, but is extremely helpful for the HR Specialists in the Business Center.

If you choose to complete this form, do not include the individual’s SSN.

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**Affiliate's Bio-Demo Information:**

<table>
<thead>
<tr>
<th>Legal Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Suffix:</td>
<td></td>
</tr>
<tr>
<td>Former last name(s):</td>
<td></td>
</tr>
<tr>
<td>Last:</td>
<td></td>
</tr>
</tbody>
</table>

**Gender:**

- [ ] Male
- [ ] Female

**SSN:**

**DO NOT submit SSN via Infoporte/Email**

**Home Address:**

**Business/Campus Address:**

**Telephone Number:**

- [ ] Home
- [ ] Business

**Email Address:**

**Affiliation Information:**

- **Dept. No.:**
- **UNC – CH Host Department/School:**
- **OHR Approval Required:**
- **Affiliate Type:**
  - [ ] Campus Minister / null
  - [ ] Carolina Club Employee
  - [ ] Carolina Dining Employee
  - [ ] Committee/Board Member
  - [ ] EMS Associate
  - [ ] External Employee
  - [ ] Fellow - Unpaid
  - [ ] US EPA
  - [ ] Research Collaborator
  - [ ] UNC Trustee
  - [ ] University Temp/Excs Employee
  - [ ] Other Contractor/Consultant

**Approved by OHR:**

- [ ] Yes
- [ ] No

**Dates Registered:**

<table>
<thead>
<tr>
<th>Start Date:</th>
<th>End Date:</th>
</tr>
</thead>
</table>

**On Campus:**

- [ ] Yes
- [ ] No

**One Card Needed:**

- [ ] Yes
- [ ] No

**Full Time:**

- [ ] Yes
- [ ] No

**Part Time:**

**Affiliate Title:**

**Sponsors PID:**

**Sponsors Name:**

**Sponsors Email:**

**Sponsors Phone:**

**Reason for Request:**

**Signature:**

**Date:**

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*Reason must include details on what the person will be doing.*

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**Note:** Affiliates are defined as any person who is not paid by or is not attending the University of North Carolina at Chapel Hill and requires University Resources to work in conjunction with UNC-Chapel Hill. Affiliates must have a UNC-Chapel Hill sponsor. Please be aware that PID processing can take up to two business days. Please give this form to your departmental HR Representative for processing.

*If needing a One Card: After approval in the Affiliate System by the PID Office go to the One Card office with a driver’s license, passport or military ID for identification purposes and the SS card fee. If the department would like to pay the fee, please contact the One Card Office 919-962-8024.*

*The Social Security Number is requested by the institution solely for administrative convenience and record keeping accuracy, and is requested only to provide a personal identifier for the internal records of the institution.*
SETTING UP AFFILIATES
WHO CAN SET UP AFFILIATES?

Basic HR Originators can perform actions in ConnectCarolina for Affiliates. This includes both Student and Complex Originators. Therefore, departments have the ability to complete their own Affiliate requests.
CHECKING FOR AN EXISTING PID

Always check to see if a PID already exists for an Affiliate. The Affiliate may have had a previous relationship with the University and the creation of a PID may not be necessary. There are three ways to check for a PID:

• Affiliate Information link
• Find Existing PID
• Affiliate Request System
Once the Affiliate Data screen appears, enter the name in the name block or enter the first/last name in separate boxes.

If there is no Affiliate, the message “no matching values were found” will appear.

If there is an Affiliate already in the system, search results will appear. Click on a name to view further details, to check if it is the person you are searching for.

The detail screen will appear and give you the name, PID, Affiliate Type, and other information.

Serve as a research collaborator to study Asian populations living within Eastern North Carolina.
When the PID Fetch screen appears, enter First and Last name of the Affiliate and click search.

If the search does not yield any names, the message “no rows found” will appear. If the search does yield names, a list will appear under Fetch Results. Click on the “Details” link to view a person’s information.

With the details screen you can view the person’s organizational relationship (also called POI – Person of Interest), biographical, and contact information. This information will help determine if this is the Affiliate for which a request has been received.
Click the login link. Login, if prompted. Otherwise, click on “Search” or “Search Campus Solutions”.

If no results are found, “no matches found” will appear. If results are found, they will be listed. Then use the PID shown to verify the person in CC by using the Affiliate Information Search or Find Existing PID search.
CHECKING FOR AN EXISTING PID

If you find an existing PID for an Affiliate, also verify their organizational relationship or POI (Person of Interest).

The PID Office can correct or add missing POIs.

There are several types of POIs. In the Affiliate system, this is also listed as SubPop, as seen below.

<table>
<thead>
<tr>
<th>SubPop</th>
<th>POI #</th>
<th>POI Description in CC</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIS</td>
<td>00009</td>
<td>Campus Solutions Person</td>
</tr>
<tr>
<td>HRIS</td>
<td>00012</td>
<td>Employee</td>
</tr>
<tr>
<td>HOSP</td>
<td>00016</td>
<td>Hospital</td>
</tr>
<tr>
<td>ADIS</td>
<td>00014</td>
<td>Alumni</td>
</tr>
<tr>
<td>AFFL</td>
<td>00100</td>
<td>Affiliate</td>
</tr>
<tr>
<td>DOR</td>
<td>00015</td>
<td>DOR</td>
</tr>
<tr>
<td>PROXY</td>
<td>00018</td>
<td>Proxy</td>
</tr>
<tr>
<td>PPL0AN</td>
<td>00019</td>
<td>Parents of Plus Loan Students</td>
</tr>
<tr>
<td>ADPRO</td>
<td>00017</td>
<td>Admissions Pros</td>
</tr>
<tr>
<td>SEVIS</td>
<td>00020</td>
<td>SEVIS Dependents</td>
</tr>
</tbody>
</table>
AFFILIATE ePAR

Use the Affiliate ePAR if:

• a background check is required and a PID exists for the affiliate
  • The start date must be on or after the return date listed on the background check results page

• if you are updating a current affiliate

• if an independent contractor needs an onyen and email account

NOTE: If the Affiliate has a PID, but you receive an error message when creating the Affiliate ePAR, contact the PID Office because the message means there is no home address on record and/or the POI type is not correct.
Affiliate ePar will appear if there are no error messages. The screen will auto-populate with the Affiliate’s information.

Enter the Sponsor Department #

Use the drop down menu to choose Affiliate Type – the screen will then auto-populate with specific data entry areas for the Affiliate Type chosen.
The ePAR will route to the PID Office for approval.

The start date must be on or after the return date listed on the Background Check results page. *If you do not receive a copy of the results page, you can email the Employment Consultant or the Background Office for the date or use the date of the approval email.

Only click Add New Entry when submitting a secondary affiliate status for the same person within the same department – see Updating an Affiliate (slide 35)

Enter the details concerning the activities to be performed.

Enter this information as it applies

Enter the Affiliate Title

Enter Sponsor’s PID. The Sponsor’s phone # & email are not required. However, be sure to include it, as the PID Office has recycled ePARs that do not include this information.

No documents are required to be uploaded for Affiliates.

Always click Affiliate Background Check box, even if one is not required.

Enter comments, initials, and click submit.
AFFILIATE REQUEST SYSTEM

• Use if a background check is not required and a PID does not exist for the affiliate

• Ensure the status is set to “Pending” in order to submit the request

• You will need to enter the Affiliate’s gender, date of birth, phone number, local work address, and local home address

• The PID Office will create a PID and set the individual up with an affiliate relationship, in addition to completing the Affiliate ePAR
**AFFILIATE REQUEST SYSTEM**

### Affiliate Request Management

**Status:**
- **AUTHORIZED**
- **DENIED**
- **PENDING**

**Social Security #:**

**Name:**
- **First:**
- **Middle:**
- **Last:**

**Gender:**
- **Select Gender**

**Email Address:**

**Date of Birth:**

**Will This Person Be on Campus?**
- **No**

**Does This Person Need a One Card?**
- **No**

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Status: set to pending to be able to submit request

Enter First & Last Name

Select Gender

Enter DOB

These are required
**AFFILIATE REQUEST SYSTEM**

Choose Sponsor Dept #

Enter Sponsor PID, email, & phone number

Choose Affiliate type & enter working title

Choose Full Time/Part Time

Enter start/end date

Affiliate Remarks – what will the affiliate be doing while at UNC-CH

Enter Phone number

Enter work address

Enter home address

Click submit to send application to the PID Office
AFFILIATE REQUEST SYSTEM

• If the PID Office finds a PID for the person, the application will be denied. Denied applications cannot be edited and an Affiliate ePar would need to be submitted.

• Recycled applications can be resubmitted. However, after necessary changes are made, the initiator will need to set the status back to Pending before resubmitting the Application.

• Approved applications result in PID creation & Affiliation in ConnectCarolina.

• Be sure to check the status of your Affiliate applications, until approved.
AFFILIATE REQUEST SYSTEM

Check the status of the Affiliate applications by following these steps:

To locate an application you have submitted, click on the “Inbox” link or “Search Requests” link. You can set the Status Code to narrow your results.

You will see a list of both Recycled and Requested Items. Click on the request number to view Application and its status.

The application will show a PID, if created, and the current status.
UPDATING AFFILIATES

This flow chart helps to explain the different options for updating Affiliates.

Find step-by-step instructions for updating existing affiliates here:

http://its2.unc.edu/cc/ConnectCarolina_WebHelp/Content/HR/Using%20ePARs/Affiliate%20Form/Updating%20an%20Existing%20Affiliate/Updating%20an%20Existing%20Affiliate.htm
CONTACTS

• Ruth Holt (ruth_holt@unc.edu) – Retirees and Emeritus Faculty; 919-962-3055
• PID Office (pid@unc.edu); 919-962-6568, 919-962-5014, 919-962-9344
• Don Jones (don_jones@unc.edu) – OHR Employment Consultant; 919-843-0501
• Background Check Office (backgroundcheck@unc.edu); 919-843-4413, 919-962-9768, 919-962-0368
HELPFUL LINKS

• OHR Website: https://hr.unc.edu/employees/policies/other/unpaid-volunteers-interns-visiting-scholars/

• Independent Contractor: https://financepolicy.unc.edu/policy-procedure/708-independent-contractor/


• PID Office (Click the Affiliates tab): https://enterprises.unc.edu/pid/

Helpful Links

• Using the Affiliate Request System:
  http://its2.unc.edu/cc/ConnectCarolina_WebHelp/Content/HR/Using%20ePARs/Affiliate%20Form/Affiliate%20Request%20System/Using%20Affiliate%20Request%20System.htm

• About the Affiliate ePAR Form:
  http://its2.unc.edu/cc/ConnectCarolina_WebHelp/Content/HR/Using%20ePARs/Affiliate%20Form/Using%20the%20Affiliate%20Form.htm
QUESTIONS?

THANK YOU FOR ATTENDING!