Arts and Sciences Managers’ Meeting Minutes
May 10, 2017

Speakers
Theresa Silsby
Director for Business Systems Help Desk, ITS - User Supp and Engagement

Noreen Montgomery
Senior Director for Employment & Staffing, Office of Human Resources Employment and Staffing

Ceresa Aberg
Human Resources Manager, Office of Human Resources Employment and Staffing

Janet Rupert
Accounting Manager, Disbursement Services

Lachonya Williams
Associate Dean for Human Resources

Laura Yurco
Assistant Dean for Finance

Kate Henz
Senior Associate Dean for Administration and Business Strategy

Help Desk Support – Theresa Silsby
• Help Desk expects to start increasing their numbers for customer service as trainings are completed.
• They are also working on the response rate to help with the efficiency of resolving help tickets.
• A remedy replacement tool is currently in the process of being generated.
• The concerns that were mentioned in the meeting will be provided to Theresa’s team for feedback and solutions.
• Onyens should be provided when submitting individual help ticket requests.
• Please see enclosure regarding more information about the Biannual Health Check for Help desk support.

Background Checks Updates – Noreen Montgomery
• Background Checks are establishing more concrete policies and procedures to ensure that there is more data security.
• They will be increasing their exclusion days from seven to ten days to allow more time for ensuring that excessive background checks are not being processed.
• Background Checks will be seeking additional feedback
on their policies and procedures in the near future.

- Please see enclosure regarding more information about the Background Checks updates.

Background Checks Advisory Committee – Ceresa Aberg

- The Background Checks Advisory Committee will be continuously reviewing ways for improvements in their policies and procedures.
- The validity period for background checks increased from 3 to 6 months.
- There is now a Background Checks hotline at (919) 962-5742.
- Please see enclosure regarding more information about the Background Checks Advisory Committee.

Important Changes to Foreign Vendor Requirements – Janet Rupert

Please see enclosures regarding changes to the Foreign Vendor requirements.

HR Announcements

Performance Review and Employee Competency Ratings –
Ratings are due in ConnectCarolina on April 30, 2017. We are running College reports and Ashante will follow-up with any supervisors who have outstanding ratings to include the step-by-step instructions. Please make sure that you have “completed” your ratings in the system and they are not still in the “in progress” status.

Performance reviews and work plans can be submitted as an original or as a copy.

Student Actions – All students must be put on either Short Work Break or terminated. Comments are required on all actions. If you choose to transfer a student into another job, please ensure that the job, FTE, working titles and funding fields are updated. Comments are required on all actions and helpful tips on placing EHRA Students on SWB can be found on the College Intranet’s “Did you know” link. Please remember, that if no action is taken, it will result in overpayment. Overpayments cause stress on the employee and require coordination with multiple university departments.

Background Checks for Faculty Employees - We have received confirmation from the Background Check Office that ALL faculty employees (including fixed term) require a background check only at the time of initial hire within the College of Arts & Sciences. Any faculty employee that is being rehired/reappointment, etc. do not require rechecks, regardless of the length in their break-in-service. We have been instructed to use the most recent background check date and stamp number for the Hiring Proposal. All background check data has been transferred to the online system. In the rare
case where you cannot locate the background check for a faculty employee (i.e. prior to the current vendor being used); contact the Background Check office to further investigate that particular case. Please be advised that this is not a new policy, however it appears that the College and others across campus have been misinterpreting the policy.

However, please keep in mind that although a new background check is not required for a faculty rehire, a waiver/posting in PeopleAdmin is still required and a new I-9 is required when there is a break-in-service of longer than 24 hours.

**Faculty Leaves** – please remember that all leave requests must be accompanied by a completed and signed Faculty Leave Notification Form that can be found on the APO website [here](#). For all External Leaves w/pay, please work with your assigned Budget Analyst (Kristen B. or Kristen R.) to receive the appropriate “top-up” form and both the Faculty Leave Notification Form and completed “top-up” should be accompanied with the request in IP to the Business Center (if applicable).

**Mandatory LawLogix New Form 1-9** – Extension has been granted for employees to complete the new mandatory training. If you have not taken the training by May 31, 2017 and pass with a score of 100%, your access to LawLogix will be revoked. If you have questions, please contact Darryl Thompson at darryl_thompson@unc.edu or (919) 843-4511 for assistance.

**May 2017 Learning Opportunities** - There are several learning/training opportunities for employees to take advantage of for the month of May. Please encourage your staff to register.

**Updated payroll calendars** for July – November 2017 are now available and were sent out to the Manager listerv on April 23, 2017. They can also be found [here](#) on the HR website.

Star Heels Awards will not be distributed this year.

*Please see enclosures in regards to Learning Opportunities for the month of May and Entering Employee Ratings in ConnectCarolina*

**Finance Announcements**

**Grant Effort:**

Thank you to everyone for your hard work ensuring that effort statements were certified, the College of Arts and Sciences was 100% compliant. Great work!
Graduate Student Health Insurance (GSHIP):

- REMINDER: Departments will continue to incur insurance premium charges for graduate students who are not removed from Graduate Student Health Insurance (GSHIP).
- Graduate students who will be graduating at the end of Spring Semester 2017, in May, must be removed from the Graduate Student Health Insurance Program effective May 31, 2017.

Commitment Control (KK) Redesign

- F&A, State and Trust Funds will move from being individual ledgers to being one group called “FAST” effective 7/1/17
- This change will be seamless in InfoPorte
- In Budget Overview you will need to set up new inquiries going forward and use the old set-ups for historical reporting
- Similar to state and F&A budget transfers, you will need to choose “parent budget entry” on the first screen
- For additional details refer to CCInfo:
  [http://ccinfo.unc.edu/2017/05/budget-changes-coming-soon/](http://ccinfo.unc.edu/2017/05/budget-changes-coming-soon/)

Purchasing and Payments

- Starting Monday May 1, they reduced the number of categories by 95% from approximately 55,000 to around 850.
- For additional details refer to link on CCInfo:

Monthly Reports

- The monthly F&A and Trust Reports (similar to the state that was released in January) is now available.
- To access these reports go to:
  Infoporte>Finance > Monthly Reports > use the filters to find the reports for your department

NIH Salary Cap

The NIH Salary Cap has increased to $187,000 (from $185,100)
Effective January 8, 2017

New Travel Policies

Please be aware they sent out a new policy on third-party travel Expenses and combining University business and personal travel. Announcement was sent on Monday, May 8th on the University Management Listserv.
For questions contact travel_team@unc.edu

Year-End Deadlines

- Spend your state funds, professorship research funds and Dean’s Office allocated trust funds before fiscal year close on remaining items that are needed for the department
- If the Finance Business Center processes your vouchers, travel, journal entries etc., please be aware we are asking for a 1 week advance of deadline submission into InfoPorte, this allows for time to process, get approval and retrieval of incomplete documentation.
- Position requests are due by May 4th
- Comments on how funds are being used are due by May 12th
- For Arts and Sciences Travel Funds, please submit CABS by 2pm May 15th; travel reimbursements 5pm June 14th and journal entries by June 19th
- Payroll for the month of June is due by the 26th.
- June 19th deadline for budget transfers, non-June PAATs, complex journal entries (ie: gift to gift) to route to Dean’s Office for approval in time for central office approval
- June 26th 12pm deadline for June PAATs

Annual Report

- Thank you for your continued work on Annual Report including stewardship! The Arts and Sciences foundation has already started using this information to write letters to donors so thank you for providing that valuable information!

Deadlines:

- Faculty-May 12th
- Stewardship May 12th
- Position Requests-May 15th
- Departmental Report-June 15th

Committee Updates – Kate Henz

- Policy review committee – information will be provided on what their tasks and goals will be soon.
- Jamie Strickland and Lori Harris will be helping with the PPID process (how the PID is generated)
  This effort is a response to the Red Tape working group
  They will continue to work on improving this process, upon people’s requests
- Ruth Hyde will be meeting with Tracey Conrad in
The Lineberger Comprehensive Cancer Center in regards suspense accounts issues

- If there are any other committees that exists within the College, please let Kate know so that she can announce them
Biannual Health Check

Report Date Range: July 1, 2016 to December 31, 2016
Meeting Date: May 10, 2017
Executive Summary

The Business Systems Help Desk mission is to provide outstanding technical support and functional support to UNC students, faculty and staff that use the administrative components of ConnectCarolina and the companion systems of Web Apps, InfoPorte, PeopleAdmin, Law Logix and CastleBranch. Our services include: Tier 1 (phone & web submissions).

This report is an overview of the quality of service the ITS Business Systems Help Desk provided to the School of Public Health customers during the time period of July 1, 2016 to December 31, 2016. Included are productivity metrics, key performance indicators (KPIs) and customer satisfaction indexes (CSIs). The intent of this report is to provide a service health check and to initiate discussions on how we can work together to improve the customer experience and ensure we are meeting the needs of the campus community.

In all of our efforts serving customers, we strive to keep the following in mind:

*It’s not about the technology, It’s about the customer.*
July 1, 2016-December 31, 2016

7,326 Total Incidents

1,658
23%

5,668
77%

Customer Demographics by Remedy Tickets - Phones/Web

UNC
- Faculty-Staff, 6338, 86%
- Other, 865, 12%
- Student, 123, 2%

College of Arts & Sciences
- Faculty-Staff, 1083, 93%
- Other, 35, 3%
- Student, 43, 4%
Volume Metrics

Comparing the total ITS Business Systems Help Desk volume by all points of contact to the subset of volume for the specific school or department.

<table>
<thead>
<tr>
<th>Point of Contacts</th>
<th>Service Desk Volume (UNC only)</th>
<th>Service Desk Percentage of Volume</th>
<th>CAS Volume</th>
<th>CAS Percentage of Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>1,658</td>
<td>23%</td>
<td>312</td>
<td>28%</td>
</tr>
<tr>
<td>Web</td>
<td>5,668</td>
<td>77%</td>
<td>850</td>
<td>73%</td>
</tr>
<tr>
<td>All Groups</td>
<td>7,326</td>
<td></td>
<td>1162</td>
<td></td>
</tr>
</tbody>
</table>

Average Wait

Average speed to answer (ASA) reflects the average time a customer must wait in order to speak to an ITS Service Desk consultant. Peak times are at semester start and during any new IT service role outs.

<table>
<thead>
<tr>
<th>Points of Contact</th>
<th>BSHD Goal</th>
<th>BSHD Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>&lt;60 sec</td>
<td>20 sec</td>
</tr>
</tbody>
</table>
First Contact Resolution

First contact resolution (FCR) captures the percentage of requests that are resolved by the Service Desk Phone analyst group on the customer’s initial contact. It is considered one of the most important Service Desk customer satisfiers. The data below shows the average resolution rates over the 6 month period of time.

<table>
<thead>
<tr>
<th>Finance Categories</th>
<th>FCR % Target/Actual</th>
<th>Finance Categories</th>
<th>FCR % Target/Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>65/73</td>
<td>General Ledger</td>
<td>65/49</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Legacy Finance Apps</td>
<td>60/68</td>
</tr>
<tr>
<td>Purchasing</td>
<td>65/78</td>
<td>Reporting</td>
<td>90/88</td>
</tr>
<tr>
<td>General Ledger</td>
<td>65/49</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legacy Finance Apps</td>
<td>60/68</td>
<td>Security</td>
<td>60/83</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HR Categories</th>
<th>FCR %</th>
<th>HR Categories</th>
<th>FCR %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Terms</td>
<td>75/54</td>
<td>Payroll</td>
<td>60/64</td>
</tr>
<tr>
<td>ePAR</td>
<td>50/66</td>
<td>PeopleAdmin</td>
<td>100/94</td>
</tr>
<tr>
<td>HR Employee Job</td>
<td>60/38</td>
<td>Person Data</td>
<td>75/60</td>
</tr>
<tr>
<td>PAAT</td>
<td>75/78</td>
<td>Security</td>
<td>60/62</td>
</tr>
</tbody>
</table>
Customer Service Indicator

The customer satisfaction index (CSI) reflects the ratings our customers have submitted regarding the service we provide. All Services Desk groups send a follow-up survey requesting customer feedback upon closing a ticket.

<table>
<thead>
<tr>
<th>Group</th>
<th>UNC Goal</th>
<th>UNC Actuals</th>
<th>UNC Surveys Returned</th>
<th>CAS Actuals</th>
<th>CAS Surveys Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSHD - Finance</td>
<td>4.5/5.0</td>
<td>4.757</td>
<td>162</td>
<td>4.702</td>
<td>44</td>
</tr>
<tr>
<td>BSHD - HR/Payroll</td>
<td>4.5/5.0</td>
<td>4.907</td>
<td>222</td>
<td>4.898</td>
<td>49</td>
</tr>
<tr>
<td>All Groups</td>
<td>4.5/5.0</td>
<td>4.844</td>
<td>252</td>
<td>4.800</td>
<td>93</td>
</tr>
</tbody>
</table>
Top 5 Ticket Categories, UNC

These are the top five categories of requests received by the BSHD for calls/web submit from UNC, as recorded in our Remedy tracking system.
Top 5 Ticket Categories, College of Arts & Sciences

These are the top five categories of requests received by the BSHD for calls/web submit from CAS, as recorded in our Remedy tracking system.
Tickets by Departments

These are the tickets by specific departments within a school supported by the ITS Business Systems Help Desk, based on number of phone tickets created.
How can we better serve YOU and YOUR customers?
College of Arts and Sciences
Business Managers
Background Check Presentation

Noreen Montgomery
Senior Director of Employment & Staffing
(919) 843-9883

Ceresa Aberg
Staffing Support Services Manager
(919) 843-4160
Objectives

- Background Check Program
- Background Check Statistics
- Background Check Advisory Committee
- Process Improvements
- Feedback/Questions
UNC-CH Background Check Program
UNC-CH Background Check History

2002
NC statewide background checks for new non-faculty employees

2007
Faculty added to policy

2011
New policy requiring current Faculty and staff to report criminal convictions

2012
Background check function moved from DPS to OHR

2013
Individuals working in residential programs who have contact with minors, CDC select agents and RAs added to policy

2014
Independent contractors added to policy
History (continued)

- Background check function has grown in scope and complexity since its transition to OHR:
  - Background check components have been expanded to include comprehensive criminal convictions, federal debarment and degree/professional license verification
  - Background check requirements have been expanded to include unpaid volunteers, interns and visiting scholars as well as UNC independent contractors, Centers for Disease Control select agents, and individuals who have contact with minors
  - New online background check process to secure confidential information through online processes
Background Check Related Policies

- **Office of Human Resources Policies**
  - Background Checks for Faculty and Non-Faculty Employees, Student Employees and Affiliates Policy
  - Policy on Unpaid Volunteers, Interns and Visiting Scholars
  - Reporting of Criminal Convictions for Current Employees and Affiliates

- **Related University Policies Managed by Other Departments**
  - Independent Contractor Policy
  - Policy on the Protection of Minors

- **Other**
  - Federal regulations related to the use of chemical or biological agents (Centers for Disease Control Select Agents)
  - Federal contracting requirements

For more information on these policies, refer to Background Check Policies and Key Components handout.
Background Check Statistics
Annual Background Check Volumes

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Background Checks</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2013-2014</td>
<td>7,504</td>
</tr>
<tr>
<td>FY 2014-2015</td>
<td>7,810</td>
</tr>
<tr>
<td>FY 2015-2016</td>
<td>8,980</td>
</tr>
</tbody>
</table>
# Background Check Volumes by Type

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRA Permanent</td>
<td>1,299</td>
<td>1,257</td>
<td>1,769*</td>
</tr>
<tr>
<td>SHRA Temporary</td>
<td>2,224</td>
<td>2,080</td>
<td>2,168</td>
</tr>
<tr>
<td>Faculty</td>
<td>995</td>
<td>953</td>
<td>1,100</td>
</tr>
<tr>
<td>EHRA Non-Faculty Permanent</td>
<td>432</td>
<td>536</td>
<td>552</td>
</tr>
<tr>
<td>EHRA Non-Faculty Temporary</td>
<td>558</td>
<td>296</td>
<td>477</td>
</tr>
<tr>
<td>PostDoc</td>
<td>466</td>
<td>402</td>
<td>446</td>
</tr>
<tr>
<td>Volunteer</td>
<td>391</td>
<td>322</td>
<td>455</td>
</tr>
<tr>
<td>Intern</td>
<td>422</td>
<td>390</td>
<td>501</td>
</tr>
<tr>
<td>Visiting Scholar</td>
<td>451</td>
<td>505</td>
<td>552</td>
</tr>
<tr>
<td>UNC Independent Contractors</td>
<td>N/A</td>
<td>657</td>
<td>658</td>
</tr>
<tr>
<td>Other</td>
<td>266</td>
<td>412</td>
<td>302</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>7,504</strong></td>
<td><strong>7,810</strong></td>
<td><strong>8,980</strong></td>
</tr>
</tbody>
</table>

* Higher than expected increase due to economic recovery, background checks being conducted by some departments for more than one candidate as well as turnover in this employee category.
Annual Background Check Volume – FYs 13-17

Total UNC-CH Background Checks vs. CAS Background Checks

19,462 UNC-CH Background Checks

4,832 CAS Background Checks

UNC-CH FYs 13-17  CAS FYs 13-17
Background Check Advisory Committee
Committee Membership

- **Linc Butler**, Associate Vice Chancellor, Office of Human Resources
- **Noreen Montgomery**, Senior Director of Employment & Staffing, Office of Human Resources
- **Gena Carter**, Senior Director of Employee & Management Relations, Office of Human Resources
- **Ann Lemmon**, Assistant Provost for Human Resources, Academic Personnel Office
- **Neera Skurky**, Associate University Counsel, Office of University Counsel
- **Mary Crosby**, Assistant University Counsel, Office of University Counsel
- **Martha Pendergrass**, Director of Procurement Services, Office of Disbursement Services
- **Sibby Anderson-Thompkins**, Director, Office of Postdoctoral Affairs
- **Wil Steen**, Associate Director, Transportation and Parking
- **Connie Bullock**, Support Services Captain, Department of Public Safety
- **Robin Willow-Johnson**, Assistant Director of Employment, Office of Human Resources
- **Vanessa Ragland**, Director of EHRA Non-Faculty, Office of Human Resources
- **Ceresa Aberg**, Staffing Support Services Manager, Office of Human Resources
- **Dan Atkins**, Background Check Supervisor, Office of Human Resources
- **Frank Lewis**, Human Resources Consultant, Academic Personnel Office
- **Starr Barbaro**, Protection of Minors Coordinator, Office of Student Affairs
- **Jordan Todd**, Human Resources Consultant, Office of the Vice Chancellor for Research
Ongoing Committee Charge

- Maintain the ability to mitigate risk and ensure campus safety
- Streamline the background check process
Background Check Advisory Committee

- Meet on an ongoing basis
- Evaluate and enhance the university’s background check program
- Provide feedback and guidance on the background check policy, procedural issues, applicable regulations, and vendor relations
- Benchmark constituent policies
- Discuss the impact that other policies have on the background check program
- Make recommendations on policy/procedure changes
Process Improvements
Policy Change Effective 3/27/2017

Unpaid Volunteer, Intern and Visiting Scholar policy:

- Exclusion period increased from 7 to 10 calendar days

“Individuals who will perform volunteer services not to exceed 10 calendar days in duration without any continuing volunteer relationship, if the assignment does not involve any unsupervised access to sensitive populations or sensitive facilities and if the individual is not otherwise an employee of the University, are excluded from the provisions of this policy.”
Policy Changes Effective 4/3/2017

- Reduce background check search period:
  - Old: Back to age 18 for all prior names/addresses
  - New: Prior 7 years for all addresses

- Increase validity period:
  - Old: 90 days prior to hire
  - New: 6 months prior to hire

- Policy clarifications:
  - Generally, a background check should only be conducted on top 1-2 candidates
  - Departments must not conduct background check until interviews have been completed
Impact of Changes

- Decreasing the search period potentially:
  - Improves turnaround time
  - Decreases the cost of background checks
- Extending the validity period:
  - Allows departments to have more time to initiate the background check prior to hire
  - Ensures that there is sufficient time for the background check to be completed prior to offer/hire
  - Reduces the need for re-checks and saves money
- Limiting the number of background checks for a given recruitment:
  - Minimizes the cost to departments
Updates to Employment Forms *(Coming Soon)*

Additional process improvement to clarify to candidates/appointees that they are responsible for reporting criminal convictions that should occur after an offer is accepted.

Additional language has or will be added to:

- SHRA Conditions of Employment
- EHRA AP-2a
- UNC Independent Contractor Request
- Unpaid Volunteer, Intern and Visiting Scholar
Advisory Committee Future Agenda Items

- Background Checks for Faculty and Non-Faculty Employees, Student Employees and Affiliates Policy
  - Consider revising criteria for contingent offers
  - Consider including additional exclusions to the background check policy (i.e. job changes & short breaks in service)

- Background Checks for Unpaid Volunteer, Intern, Visiting Scholar
  - Review the Unpaid Volunteer, Intern, Visiting Scholar policy and consider revising background check requirements
Feedback/Questions

Background Check Hotline: (919) 962-5742
Federal and State Tax Withholding and Employment Eligibility Verification Requirements for Payments to Non-Resident Alien Independent Contractors Performing Services in the United States

Janet Rupert, Disbursement Services
May 10, 2017
Background: UNC contracts with non-resident aliens for independent personal services performed in the United States for the university through an Independent Contractor (IC) agreement.

As such, these workers are subject to special federal and state income tax withholding and employment eligibility verification requirements. These requirements are similar to those of non-resident alien employees paid through payroll.

To make sure UNC is in compliance with the standards and regulations set forth by the IRS, NC Department of Revenue, and the US Department of State, we are updating policies to standardize our process of reporting these items.
Who this applies to

• All Non-Resident Alien Independent Contractors (IC) who are paid honorariums or compensated for services performed in the United States other than employee wages.

Who this does not apply to

• Salaried Non-Resident Aliens (paid through payroll).
New Policy 709

• Is being developed to formalize the process to determine eligibility to pay the IC per immigration laws and assess income tax withholding.

• New procedures and requirements are expected to be effective July 1, 2017.
What You Should Expect

There will be new forms required for the IC process for Non-Resident Aliens performing services in the United States, such as:

- Foreign Vendor Creation Form
- IRS Form W-8BEN
- Banking Information (ACH form or Foreign Wire Setup Form)
- Usual IC determination forms found in policy 708
- Copy of Passport pages: Biographical information, Visa page, entry stamp (new)
- Foreign Vendor Withholding Assessment (new)
- IRS Form 8233 (new)
- I-94 Travel Records (new)
What You Should Expect

- Additional processing time for Non-Resident Aliens who are Independent Contractors performing services in the United States.
  - Please allow an additional 2 weeks for IC approval (assuming documentation is complete).
  - Please allow an additional week for payment processing.
  - IC will receive contracted amount net of income taxes withheld, if applicable.
What needs to be done differently

Foreign Independent Contractors performing services in the United States under certain Visa types are restricted to the number of engagements they can perform in the U.S. during a period of time. If the foreign IC has exceeded those limits, UNC is not allowed to pay for services or reimburse travel expenses.

It is extremely important that promises to pay are not made before this analysis is done. As soon as you know an IC is needed, start the process to allow for enough time. Do not start the process after the service is performed. At that point, it is too late. For example, eligibility to pay IC based on Visa status and 9 days/5 visits/6 months limitations (among other restrictions) need to be determined before a promise to pay can be made.
Questions?

Contact:
Janet Rupert, Disbursement Services
jrupert@email.unc.edu
919-843-5098
Entering Employee Ratings in ConnectCarolina

Overview

The University uses ConnectCarolina to collect overall performance and competency ratings for employees. For 2016-17, you only need to enter overall performance and competency ratings for SHRA permanent employees.

Be sure that you have met with employees and have all of the required signatures before you enter ratings into ConnectCarolina.

Signing in to ConnectCarolina

1. Open an Internet browser (such as Internet Explorer, Chrome or Firefox).

   **Important:** Do not use Microsoft Edge for entering performance and competency ratings.

2. Go to connectcarolina.unc.edu and click Login to ConnectCarolina and InfoPorte (Faculty, staff & alumni).

3. Enter your Onyen and password.

   Result: If this is the first time you’ve logged in to ConnectCarolina, the system will ask you to complete the Terms of Use Agreement before proceeding, go to step 4. If you’ve logged in to ConnectCarolina before, skip to step 5.

4. Read and agree to the Terms of Use Agreement.

   Result: ConnectCarolina opens the Current Performance Documents page, which shows the manager evaluations that need to be completed. Since you only need to enter performance ratings for SHRA Permanent employees, you only see those employees in this list.

5. From the left side of ConnectCarolina home page, click HR/Payroll and then Manager WorkCenter.

6. On the Manager WorkCenter menu on the left, click Current Documents.

   **Opening the Manager Evaluation**

   7. Click the **SHRA Overall Ratings** link in the Document Type column for the employee you need to enter ratings for.
8. On the Document Details screen, click the **Start** link in the Next Action column to open the Manager Evaluation.

### Entering the Overall Performance Rating

You enter the Overall Performance Rating in Section 1 of the Performance Document.

9. Do one of the following:
   - In the Rating field, click the overall rating from the dropdown menu to choose from the list.
   - If you want to see a description of the ratings, follow these steps:
     a. Click the **Rating Description** icon to open a list of the ratings with a description of the ranges.
   - Mark the radio button next to the overall rating.
   - Then, click the **Select Proficiency** button to return to the Performance Document page.
You enter the Overall Competency Rating in Section 2 of the Performance Document.

10. Do one of the following:

- In the Rating field, highlight the overall rating from the dropdown menu to choose from the list.
- If you want to see a description of the ratings, follow these steps:
  a. Click the Rating Description icon to open a list of the ratings with a description of the ranges.
  b. Mark the radio button next to the overall rating.
  c. Then, click Select Proficiency to return to the Performance Document page.

11. Do one of the following:

- If you are not ready to complete your ratings, click Save to save your ratings.

Result: The system displays a green check and a message that you have successfully saved your evaluation. You can get back to them through the Manager WorkCenter by clicking Current Documents.
Completing the Manager Evaluation (Continued)

- If you have entered both the competency rating and the performance rating and you are ready to complete your ratings in the system, follow these steps:
  
  a. On the Manager Evaluation screen, click **Complete**.

  b. After you read the confirmation statement on the Complete Evaluation screen, click **Complete** to finalize your evaluation.

  c. On the Complete Evaluation Confirmation screen, click **OK** to return to the Document Details page.

  d. On the Document Details page, you see a green checkbox and the Status shows **Completed**. To return to the Current Performance Documents screen, click **Return to Select Documents**.

**Note:** The evaluations that you completed do not show in the Current Documents list. If you need to see the evaluations for employees that report to you directly or indirectly, choose **View-Only Documents** in the Manager WorkCenter.
HR2500 | Performance Management & Disciplinary Process for SHRA Employees
Location: 104 Airport Drive, 1501-A
Date: Monday, Wednesday, & Friday, May 9, 11 & 13
Time: 8:30-12:30

In addition to learning all aspects of the performance-management and discipline policies for SHRA employees, participants will practice setting work expectations, holding work-planning conferences and holding disciplinary counseling sessions, with multiple case studies for discussion and analysis.

1. Visit: connectcarolina.unc.edu
2. Log in: Your Onyen + Password
3. Click: Self Service
4. Click: Training Enrollment
5. Search by: Course Name
6. Click: Search