

# 2017-2018 ConnectCarolina Year-End Review

**ConnectCarolina, its data warehouse and InfoPorte-based reporting system serve as core financial, human resource, payroll, and reporting systems for the University of North Carolina Chapel Hill and the UNC System Office.** ConnectCarolina also includes the student information system for Chapel Hill. ConnectCarolina is supported by a coalition of staff from the Divisions of Finance and Operations, Information Technology, Workforce Strategy, Equity and Engagement, the Office of the Vice Chancellor of Research, and Student Administration. The student administrative systems have been live since 2009. The financial, human resources and payroll applications went live on October 1, 2014.

**During the 2017-18 academic year, ConnectCarolina support staff** continued enhancing functionality, providing new reporting capabilities, and improving the usability of the system. Both campus and central administrative users benefited from the team's efforts. This report highlights some of the most significant improvements and successes.

## Students, Faculty, and Staff

One less visible but important benefit that students, faculty and staff enjoyed was greater protection of their personal information resulting from the implementation of additional security features, like requiring 2-Step Verification for VPN and administrative applications.

- Students taking Friday Center On-line Courses	3,712
- Friday Center Continuing Education Participants	1,838
- Hours of Continuing Education Completed	55,565
- 1098Ts issued	36,900

## Students

Among the benefits that students saw were:

- Increased security for their account and billing information through the use of 2-Step Verification when paying bills.
- The ability to see an explanation of whether or not they qualify for fixed tuition.



## The Numbers

- Total course enroll and drop actions entered by students	500,041
- Undergraduate Degrees Awarded	4,630
- Graduate & Professional Degrees Awarded	3,434

## Faculty

Benefits that faculty saw:

- Improvements to the Principal Investigator Dashboard in InfoPorte, providing principal investigators a snapshot of their sponsored research funding.
- A new Faculty Portal which puts most of the teaching and many research resources faculty members use on the first page when they log in to ConnectCarolina.
- Annual statements showing the value of their benefits.
- Salary increases from the Annual Review Process (ARP) for many.

## Employees

Some of the benefits employees saw include:

- Salary increases through the Legislative Salary Increase (LSI) process or the Annual Raise Process (ARP) for many.
- A new look for paystubs that provides more information about earnings and deductions.
- Supervisors can now go to ConnectCarolina to see their employees' Office of Human Resources training.
- A more secure, automated email that notifies them about reimbursements.
- In addition to veteran status and disabilities, employees can now self-identify their ethnicity in an online form.
- A friendlier log-in page for ConnectCarolina.
- SHRA permanent employees can now see their performance ratings in ConnectCarolina beginning with 2017.
- Improved search capabilities and browsing aids in CCinfo.unc.edu.



### The Numbers

- Electronic Personnel Action Requests (ePARs) processed	100,942
- Paychecks issued	432,296
- Payroll Accounting Adjustments processed	23,845
- W2s issued	31,171
- 1095Cs issued	17,473

## Financial Support Staff

Financial Support Staff in Schools, Departments, and other Campus units saw several improvements:

- New timing for budget checking on purchase requisitions and vouchers reduced rework.
- Secure attachments for vendors.
- New campus voucher templates to reduce data entry for recurring payments.
- Targeted training for Finance reporting, including webinars on salary projections and employee funding.
- A new research gas vendor, ARC3, in ePro.
- A central fringe pool to pay out terminal leave eliminating large unanticipated payouts when an employee leaves UNC. Updates to salary projections to make them more accurate.
- A new vendor, Chemistry Storeroom.



### The Numbers

- Purchase Requisitions submitted	102,272
- Purchase Orders issued	95,945
- Vouchers submitted	206,033
- 1099s issued	3,776
- Journal Lines Processed	21,959,103
- Travel Reimbursements processed	29,860
- Pcard transactions approved	89,445
- Customer Billing Management System journals* processed (totaling \$126 million)	2,377
- Environmental Health and Safety Training sessions completed	63,516
- CORE Labs orders completed (totaling \$10.6 million)	11,502

\*Bill presentation and payment system for 37 different services and vendors.

## Human Resources Support Staff

Human Resources Support Staff in Schools, Departments and other Campus units benefited from improvements including:

- Improved accessibility features in HR applications.
- Several new features for managing training in ConnectCarolina, including the ability to send follow-up emails and generate training certificates.
- A new organization chart feature.
- A new process for loading mass supervisor and TIM Approver updates.
- An automatic process for terminating EHRA students based on the date their job is expected to end reducing the need for manual data entry.
- A pilot of online performance management processing.
- Enhancements to LawLogix Web Service to reduce error handling.
- Modified programs to allow “authorized” UNC Health Care HR Representatives to access some UNC administrative applications.

## Student Administrative Offices

### Admissions and Financial Aid

- Implementation of UNC System Office residency evaluations for undergraduate, graduate and professional school students.
- The release of over 46,000 undergraduate decisions for the 2018 academic year.

### Campus Health Services

- Created an immunization form checklist and upload page in ConnectCarolina for secure electronic submission.



## The Numbers (preliminary)

- Undergraduate applications received (first-year, transfer, readmit, and part-time classroom studies)	46,852
- Graduate and Professional School applications received	28,618

### Gillings School of Global Public Health

- Enabled the 2U Admissions application process for the online Masters of Public Health, MPH@UNC.

### International Student and Scholar Services (ISSS)

- Created checklists and upload pages in ConnectCarolina for secure electronic submission of documents from international students.

### Office of the University Registrar

- Automated loading and assignment of credit based on student placement exams.
- Created an Athletic Eligibility page, along with associated NCAA compliance reports.

### School of Dentistry

- Created a supplemental admissions application in Slate.
- Created an immunization form checklist and upload page in ConnectCarolina for secure electronic submission.

### School of Medicine

- Created a separate Slate database for the School of Medicine’s admissions processes

## Student Administrative Offices (continued)

### School of Nursing

- Implemented processes and interfaces to support a centralized application for undergraduate Nursing programs in Slate.

### Study Abroad Office

- Implemented a new interface to provide student information to TerraDotta, a system used to support and validate student applications for study abroad.

## Finance and Office of Sponsored Research Central Administrative Offices

Finance and Office of Sponsored Research Central Administrative Offices received support including:

- Fiscal year-end close planning, clean-up and processing assistance to Accounting Services, Financial Reporting, the Budget, Planning and Analysis Office, Procurement, and the Office of Sponsored Research for both FY17 and FY18.
- A new query to monitor cash advances.
- A new nVision Balance Sheet and Income Statement for the UNC-Chapel Hill Foundation.
- Central Office focused reporting.
- Completed the redesign of Commitment Control.
- Modified the Payroll Accounting Adjustment Tool (PAAT) to eliminate very small rounding adjustments.
- Changes to the Budget Carryforward Report.

### Office of Sponsored Research

- Modified the workflow for OSR transactions for more efficient processing.
- Modified the Accounts Receivable Deposit page.

### Procurement Services

- Capture and reporting of Procurement metrics.

## Workforce Strategy, Equity and Engagement

Workforce Strategy, Equity, and Engagement received the following services:

- Revamped the retroactive benefit deduction process and program.
- Improved accuracy for employee data.
- Job categorization enhancements.

## Other UNC Administrative Departments

Benefits to other UNC administrative departments include:

### Information Technology Privacy Office

- Documentation for the new Business Associate Agreement Repository.

### The Friday Center

- Implemented a new Outreach Active Enrollments report.

### School of Medicine

- Implemented functionality for contracts invoicing.

## UNC System Office

The UNC System Office received support to:

- Enable their employee addresses to integrate with Blackboard and the University's mass email system.
- Realign employee location information.
- Implement a budget management reporting model.

## Routine System Maintenance and Upgrades

If all this were not enough, the team also performed regular maintenance, completed the analysis, testing and retrofits to apply application upgrades and patches. This system support and improvements work included:

- Two major software upgrades for ConnectCarolina for Student Administration and Human Resources & Payroll to the newest version of PeopleSoft, version 9.2.
- Three quarterly software updates to student administrative applications were completed.
- The implementation of an integration software platform, Informatica.
- A move to web-based hosting of a number of applications.
- An InfoPorte Release with a PHP upgrade, as well as a database upgrade.
- Upgrades and changes to the SAS VA reporting tool.
- An upgrade to the document management system in ConnectCarolina.

## Compliance

A significant amount of effort was devoted to meeting federal and state regulatory requirements and UNC System Office mandates. This work included the following:

- Changes to the UNC System Office requirements for student and employee datamarts.
- Automated loading student-athlete schedules to TeamWorks to support NCAA Compliance.
- Improved Information Security by removing tax IDs from Vendor/ImageNow Keys.
- Performed a risk assessment for web application security improvements and eliminated vulnerabilities.
- Completed summer, fall, and spring Census.
- Enabled Payroll Multi-State Taxation.
- Supported producing annual tax documents including W2s, 1098Ts, 1099s, and 1095Cs.
- Updated federal and state tax and withholding requirements.



## The Numbers

- Logins to ConnectCarolina	8,145,312
- Application Access Requests Processed	5,101
- Documents added to Electronic File Management System	1,078,410
- Help and Service Requests Received	26,809
- Help and Service Requests Resolved	23,223
- Enhancements and Corrections Implemented	1,099
- Individuals Trained	1,841