Business Update

February 20, 2019
Emergency Information

1. Emergency Exits

2. Building Evacuation Assembly
   (Area of Rescue and Assembly location)

3. Emergency Contacts
   ○ Call Campus Police
   ○ From an Office Phone - 911
   ○ From a Cell Phone - (704) 687-2200
Today’s Agenda

Financial Services
- **Controller’s Office** - New faces, misc. reminders, P-card guidance, PATH update, and moving expense reimbursements/allowances update

Human Resources
- **EHRA Administration** - IT conversion process for EHRA
- **Performance Management** - SHRA performance appraisals
- **Learning and Organizational Development** - New approach for LEAD
- **Staff Employment** - New salary ranges

Information Technology Services
- **Client Engagement updates**
New Faces

Business Affairs

Jon Varnell
AVC for Facilities Management
Get to know Jon

John Bogdan
AVC for Safety and Security
Get to know John
New Faces

Business Affairs continued

● Amy Hisler, Associate Controller for Disbursements (eff. 2/25/19)
Upcoming Retirements

Spring 2019

- Keith Wassum, Associate Vice Chancellor for Business Services
- Ron Sanders, Associate Controller for Accounting & Disbursements
Controller’s Office Disbursement Reminders

New Travel Reimbursement and Expense Report (TRER) receipt requirement

- Only receipts for reimbursable expenses not paid for with a P-card must be submitted with the TRER. All expenses paid by P-card no longer require the receipt to be attached to the TRER.
Controller’s Office Disbursement Reminders

● Enter the transaction number (TXN) of all P-card payments associated with the trip as prompted on the TRER. You can obtain the TXN from the Bank of America’s Works system once all P-card transactions have posted.

● Additionally, the TXN must be reconciled in Works (receipt uploaded, allocation complete, and comments provided). The Travel Office will review the receipts, allocation, and comments in Works as needed.

● Related communication sent Jan. 29
Controller’s Office Disbursement Reminders

Business Standard Mileage Rate Change

● IRS mileage reimbursement rate is **58 cents per mile effective January 1, 2019.**
  ○ State mileage reimbursement rate remains 33 cents per mile (applicable for all trips over 100 miles roundtrip).

● Related internal guidance and forms have been updated.
Controller’s Office Disbursement Reminders

Main Cabin Extra

A little more of everything

Enjoy more space with Main Cabin Extra seating, starting at $20. Seats are located in Main Cabin and offered on most flights, subject to availability.

Early boarding
Be one of the first to board after elite members with Preferred Group 5 boarding and get easier access to overhead bin space.*

Boarding process »

Extra legroom
Sit back and relax with more room to stretch out at the front of the Main Cabin.

Extra legroom »

Free carry-on
You can bring 1 personal item and 1 bag with you for free. See all the restrictions before you board.

Free snacks and drinks
Beer, wine and spirits are on us; plus free Biscoff cookies or mini pretzels and soft drinks. Additional food or drinks may be available for free or to buy, depending on your route.**

Free Cabin food »

Free entertainment
Enjoy free movies and TV shows – on screen or your device.

Inflight entertainment »

Wi-Fi
You can buy Wi-Fi on select aircraft so you never miss a beat while you’re on board.

Wi-Fi »
Mileage & Parking is now **MTR - Mileage and Transportation Reimbursement** Form revision.
PCI DSS Annual Merchant Training and Validation

- **Merchant training - March/April 2019**
  - In-person training sessions will be conducted for the annual training requirement
  - Training sessions will be conducted earlier this year in an effort to ease competing demands during fiscal year end

- **Validation requirements - due by end of April 2019 (tentatively)**

- Training session information, schedules, sign-up sheets, and validation materials are forthcoming

Questions? eCommerce@uncc.edu
New Purchasing Card (P-card) Guidance

The P-card Reference Guide (PCRG) is live! It contains separate tabs for each of the following:

- Allowable/Unallowable expenditures by category
- Detailed comment assistance
- Flag Assistance
- Reconciliation instructions

Related communication sent Feb. 19
PATH Project Update

- Approved for implementation pending resources
- Track the project status using the IT Projects site

**PROJECT-108: PATH**

**PROJECT SPONSOR:**
Jay Raja  
Sr. Provost, Academic Affairs

**PROJECT DATES**
- Date Submitted: January 11, 2018
- Actual Start Date: March 1, 2019
- Projected Go-Live Date: June 30, 2019
- Confirmed Go-Live Date: -
- Project Close Date: -
Moving Reimbursements: Challenges of using State Funds

- Will require out-of-pocket expenses for new employee
  - Will likely take **more than 1 month** to process the reimbursement
  - Reimbursement is still taxable to the employee (will only receive approx. 64.85% of moving expenses incurred)

- Requirements are strict and cumbersome
  - Pre-approval required - must be submitted by employee; 3 bids required
  - Chancellor approval required
  - Documentation for all expenses being reimbursed is required
  - Since we are auditing against many specific requirements, the chances of being asked for additional documentation or requiring rework are high

- This process was purposely designed by the State to be a cumbersome, inefficient process
Moving Reimbursements/Allowances

- Current procedures: [UNC Charlotte Moving Expense Procedures](#)
- Current forms:
  - Pre-approval form
  - Reimbursement/Allowance form
- Went live Jan. 2, 2019

Make sure you download these forms before completing them.
Human Resources Updates
Information Technology Position Conversion Update

- NinerTalent – positions will need to be converted by HR, but the departments will be responsible for adding the appropriate details.
- Business Officers will receive a list of all positions that will be converted.
Performance Management

Paulette Russell
Ext. 7-0660
Performance Actions 2018-2019
## Things to Note

**SHRA Appraisals**

<table>
<thead>
<tr>
<th>Performance Period (fiscal year)</th>
<th>April 1, 2018 – March 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisal Eligible Employees</td>
<td><em>Any Employees in an SHRA status as of September 30, 2018</em></td>
</tr>
<tr>
<td>Employee Self Appraisal</td>
<td>March 1, 2019 (Open) - March 28, 2019 (Close)</td>
</tr>
<tr>
<td>Supervisor Appraisal</td>
<td>April 1, 2019 (Open)</td>
</tr>
<tr>
<td>Appraisal Due Date*</td>
<td>May 15, 2019</td>
</tr>
<tr>
<td>Performance Plan Completion (2019-2020)*</td>
<td>May 15, 2019</td>
</tr>
</tbody>
</table>

* *Supervisor Appraisal, Next Level Approval, Employee Acknowledgment complete*
# Things to Note

## EHRA Appraisals

<table>
<thead>
<tr>
<th>Performance Period (fiscal year)</th>
<th>July 1, 2018 – June 30, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisal Eligible Employees</td>
<td><em>Any employees in an EHRA status as of December 31, 2018</em></td>
</tr>
<tr>
<td>Due Date</td>
<td>July 31, 2019</td>
</tr>
</tbody>
</table>
| NinerTalent (electronic)        | • Institutional Goals (5 or 6)  
• Goals & Objectives (at least 1)  
• Professional Development Activities (list)  
• Overall Rating/Comments  
• 7 point rating scale         |
Resources

- **STAKES** website (Search STAKES in uncc.edu web browser)
  - About SHRA > Add’l Tools & Resources
    - NinerTalent Instructional Videos & Guides
    - Rating Guides (Institutional Goals Guide, Individual Goals - Rating Scale)
  - About EHRA
    - NinerTalent Guide
    - EHRA Employee Self-Appraisal document (optional)

- Communications from Human Resources

- **Questions?** Consult with Paulette Russell at ext. 7-0660
Learning and Organizational Development

Alyson Ebaugh
Ext. 7-0665
LEAD 2.0
It’s about time!
Once Upon a Time…
2019: Flexible Delivery – a la carte

1/3 Online
Offered 24/7/365

1 Full-Day Workshop
Offered 4x/year

Mini-Modules (1 - 2 hours each)
Offered 4x/year
Self-Paced

1 Year to complete requirements
Broader Target Audience
Available to All

Interim Managers

New Managers

Managers Wanting Refresher Training

Individual Contributors
Flexible Access

- LEAD is a new category in the “Browse the Library” tab
Trackable Progress

Welcome to the NEW 2019 Learning & Development
Integrated Catalog and Registration System
(New look - Integrated features - Same great offerings)

Certificate Programs

LEAD

Supervisors and Managers
Trackable Progress

Addiction Awareness Training for Managers

Addiction is a buzzword, but do we know it when we see it? We’ll unpack the difference between subs may be interested in support. Join us in learning about the resources dedicated to those considering c
Ongoing Support

• LEADers’ Resource Center in Canvas
## LEAD TRAINING REQUIREMENTS

<table>
<thead>
<tr>
<th>Online</th>
<th>Complete the following lessons in SkillPort BEFORE attending the Equal Employment Opportunity &amp; Diversity Fundamentals Workshop.</th>
</tr>
</thead>
</table>
|        | 1. [EEO is the Law](#)  
|        | 2. [Affirmative Action](#)  
|        | 3. [Legally Defensible Hiring](#)  
|        | 4. [Unlawful Workplace Harassment](#)  
|        | 5. [EEO & You](#)  
|        | 6. [Diversity & Inclusion](#)  |

| Workshop | 1. [Equal Employment Opportunity & Diversity Fundamentals Workshop](#)  
|          | - Click [here](#) to download the participant guide  
|          | 2. [Overview of the SHRA Employee Hiring Process for Managers](#)  
|          | 3. [Overview of the EHRA Employee Hiring Process for Managers](#)  |

Do you have a question about hiring? Visit the [Discussion Board](#).
# Hiring: Resource Library & Key Contacts

This page is a work in progress - check back soon!

<table>
<thead>
<tr>
<th>Frequently Asked Questions</th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Glossary of Terms</strong></td>
<td></td>
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<tr>
<td>• <a href="#">EHRA Hiring: Glossary of Terms</a></td>
<td></td>
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<tr>
<td><strong>Guides</strong></td>
<td></td>
</tr>
<tr>
<td>• <a href="#">EHRA Applicant Tracking in NinerTalent: User Guide</a></td>
<td></td>
</tr>
<tr>
<td>• <a href="#">Equal Employment Opportunity and Diversity Fundamentals Guide</a></td>
<td></td>
</tr>
<tr>
<td><strong>Helpful Links</strong></td>
<td></td>
</tr>
<tr>
<td>• <a href="#">EHRA Non-Faculty Forms</a></td>
<td></td>
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<tr>
<td>• <a href="#">EHRA Non-Faculty Administration Office Website</a></td>
<td></td>
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<tr>
<td>• <a href="#">Post EEODF Workshop Assessment</a> (not available at this time for all participants)</td>
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<tr>
<td><strong>More Training</strong></td>
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<td><strong>University Policies (UP)</strong></td>
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<tr>
<td>• <a href="#">Applications for Employment, Fraudulent Disclosure or Willful Nondisclosure (UP: 101.12)</a></td>
<td></td>
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<tr>
<td>• <a href="#">Background Checks and Criminal Activity Reporting, Employment Related (UP: 101.23)</a></td>
<td></td>
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<tr>
<td>• <a href="#">EHRA Personnel Policies (UP: 102.7)</a></td>
<td></td>
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<tr>
<td>• <a href="#">EHRA Senior Academic and Administrative Officers (UP: 102.9)</a></td>
<td></td>
</tr>
<tr>
<td>• <a href="#">EHRA Employment, UNC Policy Manual</a></td>
<td></td>
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<tr>
<td>• <a href="#">Equal Employment Opportunity (UP: 101.5)</a></td>
<td></td>
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<tr>
<td>• <a href="#">Nondiscrimination (UP: Chapter 500)</a></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Contact Information</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Sarah Ekis         | Sekis@uncc.edu 704-687-1433 King 112                                                | EHRA Non-Faculty:  
- EHRA Staff Salary Administration  
- EHRA Staff Position Management  
- EHRA Staff Recruitment and Selection |
| River Peebles      | rrpinkha@uncc.edu 704-687-0661 King 113 D                                           | Equity:  
- Equal Opportunity  
- Affirmative Action |
| Tracy Worthey      | taworthe@uncc.edu 704-687-0670 King 222 L                                           | Staff Employment and Records Management:  
- SHRA Recruitment  
- Temporary Staff Employment  
- Student Employment and Records Management |
Summary
Flexible Delivery
Broader Audience
Ongoing Support
Earns a badge! →
SHRA Market Rates

Kieffer Gaddis, Ext. 7-0654
Tracy Worthey, Ext. 7-0670
New SHRA Market Rates

Mid-November 2018
- The Office of State Human Resources and the UNC System Office released new SHRA market rates
- Result of the first comprehensive market study since the implementation of career banding in 2008
- SHRA market rates were increased by 5.8% with the exception of those previously increased to $31,200

January 1, 2019
- The University implemented the new market rates
- 294 SHRA employee salaries below new market ranges (90% - 110%)

February 1, 2019
- 294 SHRA employee salaries increased to 90% of new market ranges effective Feb. 1 to maintain compensation philosophy (all salaries within range)
SHRA Market Relationships

- SHRA Employees as of February 1, 2019: 1,804
- SHRA Employees below new market rates: 1,404 (78%)
- SHRA Employees at new market rates: 238 (13%)
- SHRA Employees above new market rates: 162 (9%)
- Total costs to increase 1,404 employees to new market rates: $6.1M
  - $4.8M (Salary)
  - $1.3M (Fringe)
Position and Recruitment Salary Administration

- All position and recruitment action salary recommendations shall be consistent with current internal pay alignment
- 100% of new market rates shall not be requested unless all comparable positions and/or employees are similarly designated
- Recruitment advertising shall include an anticipated hiring range of 90% of new market range to 100% of old market rate to ensure internal pay alignment
- All position action requests (reallocation, competency level change, career progression adjustment) shall require greater consultation with HR to ensure most strategic approach
SHRA Position Management Salary Report

Please contact SHRA Classification and Compensation for salary and market compensation reports for your unit.

Kieffer Gaddis, 7-0654, kgaddis@uncc.edu
Tiffani McCain: 7-0655, tmccain2@uncc.edu
Salary Increase Guidelines

- The University has delegated authority to approve position and recruitment action salary increases up to 19.99%
- Salary increases associated with position actions shall not exceed 19.99%
- Salary increases associated with promotions may exceed 19.99%
- Promotional salary increases of 20% or greater shall be submitted by HR to the UNC Board of Governors for review / approval
- The UNC Board of Governors shall approve promotional salary increases of greater than 20% provided that requested salary does not exceed 90% of the market range associated with position for which selected
Other Items of Interest

- Preston Moran, Temporary Staff Employment Consultant, pmoran@uncc.edu or 7-5224
- Start planning now for your summer staffing needs
- Check in with your student employees about their plans for the fall semester
- New hires for the fall semester may complete paperwork prior to summer break
- Once completed, you may submit an Electronic Personnel Action Form (EPAF) early for review/approval prior to start of Fall semester
- Maintain strict compliance with established Payroll Department deadlines to ensure timely assignment set-up and employee payment
Beth Rugg, AVC Client Engagement, ITS
Identity Management & Sponsored Guest Process

- We need critical pieces of information about guests so that we don’t create duplicate accounts
  - Legal First (not letters or preferred or short names)
  - Legal Middle (not letter or preferred or short names)
  - Legal Last
  - Date of Birth (true DOB, not made up DOB)
  - Personal email address (not friend’s, parents, co-workers or other @uncc.edu account)
  - Permanent address (not university address or university building)
Endpoint Computing Updates

● Operating System Update
  ○ Available in February self service upgrade
  ○ Mandatory end of March
  ○ Windows 1803/Mac Mojave

● Office 2019
  ○ Available February
  ○ Older versions will be uninstalled
  ○ MS Project & Visio will need to be upgraded
  ○ New computers will come with Office 2019

● New computers Academic Affairs
BerryDunn Update

- 150+ individual IT staff interviews: January
- Developing report now
- Town Hall and college/department meetings: April
- Draft report to Chancellor: May
- Chancellor decisions: Early fall
IT Projects

Total Projects by Status

- On Hold: 9.3%
- Not Approved: 11.1%
- Implementation Phase: 23.3%
- Idea Under Consideration: 22.8%
- Completed: 22.8%
- Cancelled: 5.5%

Ideas & Projects We Are Working On

- 5/16/2018: 87
- 6/28/2018: 97
- 7/26/2018: 100
- 8/23/2018: 98
- 9/20/2018: 89
- 10/18/2018: 90
- 11/15/2018: 82
- 1/8/2019: 79
- 2/5/2019: 89
Duo and 365 Day Password Policy

Duo Adoption Timeline by Percentage

- First Duo Enrollment - November 2014
- Duo Testing - Spring/Summer 2014
- ITS Mandatory Duo Enrollment - September 2014
- Period of mandatory adoption by some departments - August 2016 - August 2017
- Duo Self Enrollment tool available - May 2018
- Period of communications push to employees not enrolled in Duo - November 2018 - January 2019
- Duo enabled for all employees, sponsored guests & emeriti - January 31, 2019
Questions?