Emergency Information

- Emergency Exits
- Building Evacuation
  Assembly

Area of Rescue and Assembly Locations

- Emergency Contacts
  - Call Campus Police
  - From an Office Phone: 911
  - From a Cell Phone: 704-687-2200

Wednesday, October 2, 2019
Today’s Agenda

Financial Services

- Controller’s Office: New faces/vacancies, reminders, updates, and upcoming initiatives

Financial Systems Support

- HR Systems Support: Kronos user interface refresh

**Break** - 10 minutes
Today’s Agenda

Human Resources
- EHRA Administration: Teleworking agreements / Performance
- Learning & Organizational Development: Leadership Opportunities
- Benefits: Open enrollment information for insurance

Information Technology Services
- Client Engagement updates
New Faces in Leadership

Rich Steele
AVC for Business Services

Colleen Penhall
AVC for University Communications

Doug Hague
Interim Executive Director for Data Science Initiative

Brook Muller
Dean of College of Arts + Architecture

Jennifer Troyer
Interim Dean of Belk College of Business

Catrine Tudor-Locke
Dean of College of Health and Human Services

Eric Conklin
Assistant Controller & Bursar
New Faces/Changes - LOD

Learning and Organizational Development (LOD)

Alyson Ebaugh, Director

Alyssa Paige Treager, Sr. Instructional Design & Learning Specialist

Cathleen Mosel, LOD Specialist

Bryan Calkin, Head of Leadership Development

Meet the team
Other New Faces

- **Jamette Blue**, Payroll Technician
- **Debbie Hopkins**, Purchasing Agent
- **Grace Wright**, HR Consultant for Temporary Employees
- **Arielle Rose**, HR Specialist for Academic Budget & Personnel
- **Elizabeth Moll**, promoted to Assistant Budget Director of Academic Budget & Personnel
Vacancies in Key Positions

Grants & Contracts Administration

- Associate Director

ITS

- Associate Director-Enterprise Applications
- Service Desk Manager-Client Engagement
## Financial Services Reminders

| Out of state employees | - Webpage resource with definition and procedures if hiring an employee who primarily resides out of state  
|                        | - Faculty “Duty Station Attestation” form - forthcoming  
| 49er Mart              | - Supplier Portal:  
|                        |   ○ Collecting unique vendor information  
|                        |   ○ Future feedback session  
|                        | - Send system questions/feedback (re: eCR-electronic Check Request, Amazon Punch-out, Supplier Portal, etc.) to 49er Mart Administrator, Denice Ferguson, [49erMartSupport@uncc.edu](mailto:49erMartSupport@uncc.edu) |
## Financial Services Reminders

| UP 601.8 | University Policy 601.8, Appropriate Use of University Funds Standards  
○ Clothing being purchased using State Funds must have a safety or security need  
○ See Allowable Fund Usage Table |
| Financial Management Guidelines | Financial Management Guidelines - revised August |
Business Updates

- **PATH project** - ITS will be working on requirements
● Collaborative initiatives

○ Business Advisory Panel (BAP)
  ■ Meet quarterly to provide valuable feedback and collaborate on new ideas

○ Business Executive Committee (BEC)
  ■ New August 2019!
  ■ Meet twice yearly to review initiatives/goals at a high level
# Meet Your Representatives

## Business Advisory Panel

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julie Earls</td>
<td>Col. of Health &amp; Human Svcs.</td>
</tr>
<tr>
<td>Mary Welsh</td>
<td>Col. of Arts + Architecture</td>
</tr>
<tr>
<td>Jenny Vincent</td>
<td>Belk College of Business</td>
</tr>
<tr>
<td>Sheri Rice</td>
<td>Enrollment Mgmt</td>
</tr>
<tr>
<td>Jessica Barton</td>
<td>Library</td>
</tr>
<tr>
<td>Sandra Soriano</td>
<td>Information Technology Svcs.</td>
</tr>
<tr>
<td>Valerie Crickard</td>
<td>Grants &amp; Contracts Adm.</td>
</tr>
<tr>
<td>Jan Mullman</td>
<td>Auxiliaries - PaTS</td>
</tr>
<tr>
<td>Denice Barnett</td>
<td>Safety &amp; Security</td>
</tr>
<tr>
<td>Rob Sewell</td>
<td>Housing &amp; Residence Life</td>
</tr>
<tr>
<td>Kerin Weston</td>
<td>University Advancement</td>
</tr>
</tbody>
</table>

## Business Executive Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne Brown</td>
<td>Financial Services</td>
</tr>
<tr>
<td>Melissa Leamon</td>
<td>Business Affairs</td>
</tr>
<tr>
<td>Heather McLendon</td>
<td>Financial Systems Support</td>
</tr>
<tr>
<td>Alyson Ebaugh</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Charisse Medina</td>
<td>Auxiliary Services</td>
</tr>
<tr>
<td>Melanie Witherspoon</td>
<td>Facilities Management</td>
</tr>
<tr>
<td>Elizabeth Moll</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Pat Barber</td>
<td>Information Technology Svcs.</td>
</tr>
<tr>
<td>Gail Keene</td>
<td>Research &amp; Eco. Development</td>
</tr>
<tr>
<td>Frank Fleming</td>
<td>Student Affairs</td>
</tr>
<tr>
<td>Cleo Widmaier</td>
<td>University Advancement</td>
</tr>
<tr>
<td>Brenda Shue</td>
<td>Chancellor &amp; Inst. Integrity</td>
</tr>
<tr>
<td>Darin Spease</td>
<td>Athletics</td>
</tr>
</tbody>
</table>

Wednesday, October 2, 2019
MCD (Mobile Communication Device) Allowances

What? Post Audit for Compliance
- Complete documentation (business justification reviewed, but not audited)
- Allowance *doesn’t exceed* employee’s actual service cost (equip. not allowed)
- Authorized approvals

Why? To continue allowing *non-taxable* treatment

Who? All *New*, all *$60 exception rate*, & a sample of certain positions with renewed MCD allowances (27% of 636)

When? Under review. Once distributed, *2 weeks* to address *required actions*
Upcoming Initiatives

Travel

Delegated Authority

- The audit process is being reviewed so we can provide more timely feedback
- Changes effective January 1, 2020

- The FBAE (food, beverage, & amenity expense documentation) form will be simplified, likely to an “Entertainment Expense Form”
# Upcoming Initiatives

## Financial Services & Human Resources

<table>
<thead>
<tr>
<th>Leave attestation</th>
<th>2019 Leave Attestation request will be sent to all leave earning employees early November</th>
</tr>
</thead>
</table>

- EPAF (Employee Personnel Action Form) certification training coming Spring 2020 in Canvas.
  - Will be required for new employees before submitting EPAFs. Current employees can use as reference tool.
Other News

“A Visit From The IRS,” April 2019

● Full audit would include reviews of:
  ○ Employees who received both a Form 1099-MISC and a Form W-2 in the same calendar year
  ○ Whether a service provider (independent contractor) should have been classified as an employee
  ○ Whether any reimbursements constituted taxable fringe benefits to the employee.

● Refer to How to Pay Individuals & How to Pay Students flowcharts
Other News (cont.)

“A Visit From The IRS,” April 2019

● Takeaways
  ○ If you have paid someone as an employee in the calendar year, default is that any additional payments must made to them as an employee
  ○ Independent contractors must meet IRS defined criteria
  ○ Certain reimbursements still represent taxable fringes to employees
Working to transition to a bi-weekly payroll for student and temporary workers
Student/Temp Monthly Payroll to Biweekly

Why?

- Better enables our students/temporary employees to meet their financial obligations
- Meeting a longstanding request to better serve our student/temporary workers
- Contributes to student success efforts
Student/Temp Monthly Payroll to Biweekly

Process changes required:

- Timesheet actions *every 2 weeks*
  - Student/temporary employees
  - Web Time Entry (WTE) approvers
Additional work to complete:

● HR business process improvements
  ○ EPAF error reporting for HR
  ○ Improved employee/approver communications for EPAF & WTE submission & approval deadlines

● Updates to existing training manuals, FAQs, and related documentation

● Campus communications
Student/Temp Monthly Payroll to Biweekly

We want to hear from you!

Share your comments, questions, considerations, or any other feedback with us.
Financial Systems Support

HR Systems Support

Donna Cochran, Kronos WFR System Administrator, Ext. 7-6110
Fall 2019

Facelift for Kronos software

- Updated menus
- Navigation changes
- New features
Training Opportunities and Resources

● New UI Webinar (recorded)
  ○ Supervisors - Oct. 1
  ○ Exempt Staff - Oct. 15
  ○ Non-exempt - Nov. 5

● Work Sessions (optional)
  ○ Supervisors - Oct. 3, Oct. 8, Oct. 10
  ○ Non-exempt staff - Nov (TBD)

● FAQs
  ○ Will be updated with new screenshots and navigation instructions.
Break

See you in 10 minutes!
HR - Staff Teleworking Agreements

- Must be renewed annually.
- Employees/Supervisors will be contacted about renewing
- The teleworking arrangement must continue to support the operational needs of the work unit and also provide for appropriate oversight of the employee’s work

- Reference University Policy 101.22
# Things to Note

## SHRA Performance Actions 2019-2020

<table>
<thead>
<tr>
<th><strong>SHRA Interim Reviews</strong>&lt;br&gt;(required if employee had any rating of “Not Meeting Expectations” on last appraisal, or has a disciplinary action in the 2019-2020 cycle)</th>
<th>October 1 - 30*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Appraisal - Eligible Employees**</td>
<td><em>Any Employees in an SHRA status as of September 30, 2019</em></td>
</tr>
<tr>
<td>Performance Period</td>
<td>April 1, 2019 - March 31, 2020</td>
</tr>
</tbody>
</table>

*Probationary Reviews are required quarterly (July, October*, January, May)

**Performance Plans are still required for employees who are not eligible for an “Annual Appraisal.”
## EHRA-NF Performance Actions 2019-2020

<table>
<thead>
<tr>
<th>EHRA Goals &amp; Objectives Communicated (60 days from start of cycle)</th>
<th>End of September</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisal Eligible Employees</td>
<td><em>Any employees in an EHRA Non-Faculty status as of January 3, 2020</em></td>
</tr>
<tr>
<td>Performance Period</td>
<td>July 1, 2019 - June 30, 2020</td>
</tr>
</tbody>
</table>
HR - Learning & Organizational Development

Bryan Calkin, Ext. 7-8873
Head of Leadership Development
Leader/ship development programs

Managing Self

Managing Others
Leader/ship development programs

Program Overview and Justification

1. The Leadership Experience
   • Here at UNC Charlotte

2. Center for Creative Leadership: Leadership Dev. Program
   • In Greensboro

Looking for “Directors” and above…
   • Can nominate self or others

Why now?
   • New Chancellor (new priorities?) + retirement-eligibles + deliberate succession planning = important and urgent
1. Leadership Experience Spring Semester Commitment: 10 Days

- **$500**
  - Non-refundable investment from dept

- **12**
  - Hours of project work

- **8**
  - Days in classroom (Two/month)

- **4**
  - Hours of meetings with your manager

- **360º**
  - Assessment & Coaching
1. Leadership Experience Spring Semester Commitment: 10 Days

- National Winner of 2014 CUPA Excellence in HR Practices Award
- Jan 9th to May 11th: Leadership Experience
  - Addresses self-awareness, ethics, change mgmt, systems thinking, & decision making
- Outcomes include business case and recommendations
  - Final report to manager and other execs
1. Leadership Experience: Previous Topics

1. How can UNC Charlotte measure value, ROI, and results?
2. How can Higher Education leverage “big data”?
3. What does succession planning look like in Higher Education?
4. What is UNC Charlotte’s brand, and why does it matter?
5. How can UNC Charlotte foster strategic alignment across campus?
6. What does leading in a VUCA world (volatile, uncertain, complex, and ambiguous) look like?
7. What are the best practices in coaching and retention of first-generation students and why does it matter?
8. What can UNC Charlotte do to foster community engagement?
9. What could career-pathing look like for SHRA employees at UNC Charlotte?
10. What can, and should, UNC Charlotte learn from corporate America?
2. CCL Leadership Development Program Commitment: 5 Days

- Internationally recognized 5-day course in Greensboro
- Builds self-awareness, communication skills, influence, resilience
- Lng & Org Dev Cost: $7,600 + expenses (~$10,000/person)
- Must attend 5-day course between 02 Dec 19 – 11 May 20
- Expected to remain within UNC system/NC govt for 1 year, or may be required to pay back a prorated portion of program scholarship costs IAW state policy
Leadership Development

Even if you don’t have direct reports, you can still be a leader. As John C. Maxwell says, “Leadership is influence.” We are proud to offer a variety of options to meet your leadership development needs. Visit our Catalog and Registration site to see a complete listing of workshops for all Faculty and Staff, and sessions designed specifically for Supervisors and Managers. Our leadership certificate programs are described below.

- **ASPIRE**
- **Center for Creative Leadership Leadership Development Program (LDP)**
- **LEAD**
- **The Leadership Experience**
Leader/ship development programs

**Your Role**

- Spread the word!
- Identify, discuss with, and nominate high-potential candidates
- Nominations may be completed by self or manager
- Applications close on **31 Oct** (CCL LDP®) and **8 Nov** (Ldrshp Exp)

- Questions? Call or email me (**Bryan Calkin**) at 7-8873 or **bcalkin@uncc.edu**
## Important Employee Benefits Dates

<table>
<thead>
<tr>
<th>Open enrollment period</th>
<th>Effective date of changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov. 2-19, 2019</td>
<td>Jan. 1, 2020</td>
</tr>
</tbody>
</table>
Benefits You Can Enroll In/Update

Health

70/30 plan

80/20 plan

NCFlex

dental

vision

accident

cancer & specified disease

ad & d

group term life

flexible spending accounts

critical illness

Health

accident

cancer & specified disease

80/20 plan

70/30 plan

NCFlex

dental

vision

accident

cancer & specified disease

ad & d

group term life

flexible spending accounts

critical illness

Health
SAME network available in 2020 as in 2019
Employee premiums frozen for 2020; same rate as 2019!
State Health Plan Highlights

- **Actions Needed:**
  - All current participants are auto enrolled in the 70/30 Plan; must make change in eBenefits if wanting the 80/20 Plan or to cancel coverage
  - Complete tobacco attestation to receive wellness credit
  - If tobacco user - attestation premium credit activity simplified - no vouchers!
State Health Plan Highlights

● 70/30 plan - several changes:
  ○ Preventive services will be covered at 100% ($0 copay)
  ○ Primary Care Provider (PCP) copay reduced from $45 down to $30 when you visit the PCP listed on your ID card
  ○ Medical coinsurance and pharmacy maximums will be combined into one maximum out-of-pocket amount
  ○ Deductible and some copays will increase

● 80/20 plan remains the same
  ○ No changes to any out-of-pocket amounts
Tobacco Attestation Activity

- Attestation premium credit activity simplified for tobacco users who want to reduce their monthly premium
- Must commit to visit a CVS MinuteClinic for at least one tobacco cessation counseling session by December 31, 2019, or risk losing the monthly premium credit
- A voucher is no longer required!
Tobacco Users Actions Needed for Credit

- Complete tobacco attestation in eBenefits; indicate tobacco use and commitment to at least one tobacco cessation counseling session
- Take insurance card to the CVS Minute Clinic for your session
- Request and complete the tobacco cessation counseling session by 12/31/2019 or risk losing the credit
- Request a receipt that indicates tobacco cessation

NOTE: If CVS Minute Clinic provides other services you will be charged for visit
NC Flex Highlights

- Reference the **2020 NCFlex Enrollment Guide.pdf** for the full list of options and rates
Changes to Dental

- **NEW!** Classic Option plan
- **Action needed:** Review the dental plan chart of benefits coverage as changes have been made to the plans.
- Current participants in High Option plan for 2019 are automatically moved to the new Classic Option plan. Action is required if you want to change to the new High Option or Low Option plans.
NC Flex Highlights

- Dental continued
  - Current participants in Low Option Plan for 2019 will stay in that plan. No action needed unless wanting to change to the Classic Option Plan or High Option Plan.
  - Reference the comparison chart in the 2020 NC Flex Enrollment Guide.pdf for differences
NC Flex Highlights

- Flexible Spending Accounts (FSA)
  - Health Care
    - Annual contribution limit increased to $2,700
  - Dependent Care
    - Annual contribution limit $5,000

**Note:** You must enroll/re-enroll to participate in 2020

Find FSA eligible health products on [FSASStore.com](http://FSASStore.com)
NC Flex Highlights

- Group Term Life Insurance
  - Reference the 2020 NCFlex Enrollment Guide.pdf for options to enroll and/or increase coverage
What happens if I take no action?

- **Health benefits**: If enrolled in 80/20 Plan for 2019, **coverage automatically changes to 70/30 Plan for 2020**
- **If tobacco attestation** is not completed in eBenefits, *premium will be higher*
- **NCFlex Benefits**: Generally same coverage you have in 2019, pending eligibility
What happens if I take no action?

- **NCFlex Benefits Exceptions**
  - Flexible Spending Accounts
    - Must re-enroll to participate in 2020
  - Dental coverage
    - If enrolled in High Option plan for 2019 you will be automatically enrolled in Classic Option plan
    - Must make an active election to enroll or change plans, depending on your 2019 coverage
Open Enrollment Reminders

- Provide **State Health Plan Required Documentation** for any dependents added to health coverage
- Ensure any covered dependents (spouse and/or children) are still listed as verified in the eBenefits system
- Verify social security number for each covered dependent
Open Enrollment Reminders

- Review/update your beneficiaries
- If not already enrolled, elect the $10,000 Core Accidental Death and Dismemberment policy at no cost to you

<table>
<thead>
<tr>
<th>Plan</th>
<th>Coverage Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core AD&amp;D</td>
<td>$10,000 (provided at no cost to you, if you enroll)</td>
</tr>
</tbody>
</table>
# Upcoming Events

<table>
<thead>
<tr>
<th>Date</th>
<th>What</th>
<th>When/Where</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 3</td>
<td>Open enrollment preview/wellness event Featuring <strong>Flu shots</strong>, fitness sessions, vendor booths. Sponsor: Walgreens</td>
<td>9:00 - 11:30 am, Lucas Room in Cone Center</td>
</tr>
</tbody>
</table>
| Oct. 8     | **Fall Festival**  
Sponsor: Staff Council                                                 | 11:30 am - 1:30 pm  
SAC, Benefits Office Booth                                               |
| Oct. 28    | Flu shot clinic  
Sponsor: Maxim                                                           | 7:30 am - 3 pm, Lucas Room in Cone Center                                        |
| Oct. 30 - Nov. 15 | **Webinars - State Health Plan 101**                                     | Online                                    |
Resources - Electronic

- State Health Plan
- NCFlex Guide 2020
- To change current benefits - eBenefits & eBenefits mobile app
- HR Benefits Insurance Open Enrollment page
## Resources - Contacts

<table>
<thead>
<tr>
<th>Eligibility and Enrollment Support Center</th>
<th>855-859-0966</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Cross and Blue Shield of NC (benefits and claims)</td>
<td>888-234-2416</td>
</tr>
<tr>
<td>CVS Caremark (pharmacy benefits questions)</td>
<td>888-321-3124</td>
</tr>
<tr>
<td><a href="mailto:Benefits@uncc.edu">UNC Charlotte Benefits Office</a></td>
<td>704-687-8134</td>
</tr>
</tbody>
</table>

**Wednesday, October 2, 2019**
FALL BREAK WORK

PHONE SERVER UPDATES
Friday, October 4 | 5 p.m. to 11:59 p.m.
WHAT TO EXPECT:
Potential brief and intermittent interruptions to emergency phones, as well as other phone and voicemail services. Full functionality will return following updates.

Tuesday, October 8 | 5 a.m. to 7 a.m.
WHAT TO EXPECT:
Potential brief and intermittent interruptions to emergency phones, as well as other phone and voicemail services. Phones will reboot by 7 a.m. and full functionality will be restored.

NINERNET SOFTWARE UPGRADE
Saturday, October 5 - Sunday, October 6
WHAT TO EXPECT:
NinerNet.uncc.edu and corresponding services will be offline from Saturday, October 5 at 7 a.m. until Sunday, October 6 at 11:30 p.m. During this time, users will be unable to reset NinerNet passwords, manage Duo accounts, or use the Get Duo page. Additionally, sponsors will be unable to extend guest requests. Services will return following the upgrade.

NETWORK UPGRADES (EPIC ONLY)
Monday, October 7 | 5 a.m. to 7 a.m.
WHAT TO EXPECT:
Potential brief and intermittent access to wireless/wired networks, phones, voicemail, and computers in the Energy Production and Infrastructure Center (EPIC). Full functionality will be restored following upgrades.
SECURITY UPDATES

Ransomware War

Ransomware attacks against medical, educational & govermental organizations - as reported across the US.
249,892 views

Ransomware Map
- Municipality
- Medical
- Education
- Other
- Law Enforcement
- Federal Government
- Other / No data
UNC Charlotte Reported Phishing Campaigns

Total Campaigns

178
IT SECURITY SPOTLIGHT

"EMOTET" TARGETS UNIVERSITY EMAIL
Scam Alert: Gift Card Phishing
How to identify and report scam emails

How to Recognize and Report Phishing Attacks
Dropbox files from @uncc.edu were shared across the globe in 2019.
PERCIPIO: PROVIDES ONLINE LEARNING
Friday, September 6, 2019

Google Updates We Found Useful

- Out-of-office notices in Gmail and Hangouts Chat
- Dark mode now available for Google Keep on the web
- Tools to enhance reporting in Google Sheets
- New fonts to improve reading speed now available
- Improving active account awareness when opening files with multiple sign-ins
- Improving real-time collaboration in Google Docs for assistive technology users (Available Sept. 12)

IT Connections: September Sessions

In-Person Training
IT PROJECTS

Ideas & Projects We Are Working On

<table>
<thead>
<tr>
<th>Date</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/30/2018</td>
<td>87</td>
</tr>
<tr>
<td>6/28/2018</td>
<td>97</td>
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<td>7/26/2018</td>
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<td>6/27/2019</td>
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<td>8/22/2019</td>
<td>82</td>
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<tr>
<td>9/19/2019</td>
<td>86</td>
</tr>
</tbody>
</table>
TECHNOLOGY PORTFOLIO COMMITTEE PROFILE ‘19-’20

- 64 Committee Members
- 5 Divisions
- 54 Staff
- 26 Departments
- 10 Faculty
Spring 2020
Business Updates: February 4 April 8
Thank you!