Welcome to Carolina!

Welcome to Carolina
EPA Non–Faculty
New Employee Orientation Program

Office of Human Resources
(919) 843-2300

http://hr.unc.edu
http://hrconnect.unc.edu
## Disclaimer

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## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>1:00 – 1:10 PM</td>
<td>Welcome</td>
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<tr>
<td>1:10 – 2:10 PM</td>
<td>Benefits Review</td>
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<tr>
<td>2:10 - 2:20 PM</td>
<td>Break</td>
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<tr>
<td>2:20 - 3:15 PM</td>
<td>Benefits Review con’t and Q&amp;A</td>
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<tr>
<td>3:15 – 3:30 PM</td>
<td>Break</td>
</tr>
<tr>
<td>3:30 – 5:00PM</td>
<td>EPA Programs, Policies &amp; Services</td>
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</table>
Benefits & Work/Life Programs
New Employee Orientation

Benefits & Work/Life Programs
104 Airport Drive, Campus Box 1045
Chapel Hill, NC 27599-1045
Phone: (919) 962-3071  Fax: (919) 962-6010
http://hr.unc.edu

What we will discuss today

- Benefits Eligibility (Employee and Dependents)
- Retirement Plans
- Health Insurance
- NC Flex Plans
- Disability Plans
- Leave Programs
- Employee Assistance Program
- Tarheel Discounts & Perks
- Work/Life & Wellness Programs
Eligibility

- Permanent part-time employees working 20 - 29 hours per week are eligible for all benefits except mandatory retirement, disability insurance and 401(k)
  - Employees must pay full cost of health coverage
- Permanent (non-temporary) full-time employees working 30 or more hours per week are eligible for all benefits

Dependent Eligibility

- Dependent children are eligible for coverage up to age 26 (dependent children over age 19 must not be eligible for employer sponsored health coverage)
- Domestic partner coverage available for Reliance Standard AD&D, United Concordia Dental and MetLife Group Term Life Insurance
- Spouse is eligible for all benefit plans where dependent coverage is offered
Benefit Changes/Updates

Address
- Enter your permanent/home address into the UNC Directory: dir.unc.edu

When can I make changes to my benefit elections?
- Qualifying Life Events
  - Notice must be made within 30 days of the event
  - Examples include: birth, death, marriage, divorce, change in job status for self or spouse, etc.
- Annual Enrollment
- After-Tax Plan Flexibility

Retirement Programs
Mandatory Retirement Programs

- Participation in a retirement program is mandatory
- Contributions begin on day one of eligibility
- You may choose between:
  - The North Carolina Teachers' and State Employees' Retirement System (TSERS), a defined benefit plan or
  - The UNC Optional Retirement Program (ORP), a defined contribution plan
- You must make your election between TSERS and ORP within 60 days of your eligibility date (usually your hire date)
- Retroactive contributions are deducted in one lump sum
- Once enrolled, you may not change your election (irrevocable)
  - Automatic TSERS enrollment if no election is made

Teachers’ and State Employees’ Retirement System (TSERS)

- Defined Benefit Plan
  - Based on a predetermined formula that considers creditable service, age, and average compensation
  - Employee contribution is 6% of pay
  - Employer contribution funds benefits for all plan participants
Teachers’ and State Employees’ Retirement System (TSERS)

- Members become vested in the TSERS plan once they’ve completed a minimum of ten years of membership service.
- Vesting allows member to apply for lifetime monthly retirement benefits based on the current retirement formula, age and service requirements.
- Retirees are eligible for health plan benefits.
- Service purchase options:
  - Temporary service
  - Military service
  - Withdrawn service

Beneficiaries can be designated online at: myncreirement.com

- Death Benefit:
  - Must have 12 months of contributing service.
  - Benefit is based on reported earnings ($25,000 min - $50,000 max).

- Options after leaving the University:
  - Leave contributions in account.
  - Withdraw contributions (taxes and penalty).
  - Roll over to another retirement account.
  - Retire.
Teachers’ and State Employees’ Retirement System (TSERS)

Unreduced/ Full Retirement
- 30 years at any age
- 25 years & at least age 60
- 10 years & at least age 65

Reduced/ Early Retirement
- 20 years/age 50
- 10 years/age 60

### Creditable Service

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Optional Retirement Program (ORP)

- **Defined Contribution Plan**
  - Contributions are made by you and the University
  - Employee contributes 6% of pay
  - Employer contributes 6.84% of pay
  - Value of account is based on contributions made to your account and performance of investment funds selected
  - Portability!

- Retirees are eligible for health plan benefits
- Five year vesting for employer contribution
- Review the retirement plan decision guide
Optional Retirement Program (ORP)

- Complete the ORP-1
- Set up your investment account(s) with your selected vendor(s)
- Vendors can assist with asset allocation & can run retirement projections for both TSERS and ORP
- Each vendor provides 20 core funds to choose from and each vendor provides lifecycle funds
- Choose from four investment providers (Fidelity Investments, Lincoln Financial Group, TIAA-CREF and VALIC)

Retirement Plan Reminders

- Complete the retirement acknowledgment/election form
- Your retirement election must be made within 60 days of eligibility
  - Contributions into the retirement plan are effective the first day of eligibility
  - Retroactive contributions are payroll deducted in one lump sum
- Retirement choice cannot be changed; it is irrevocable
- Designate beneficiaries for TSERS, or
- Complete ORP-1 and set up your account(s) for ORP
Supplemental Retirement Plans

- Consider boosting retirement savings by participating in one or more of the supplemental retirement plans offered.
- There are three types of plans available:
  - **403(b)**: administered by UNC General Administration; two vendors (Fidelity and TIAA-CREF)
  - **NC 401(k)**: sponsored by the NC Dept. of State Treasurer and administered by Prudential (11 institutional funds)
  - **NC 457**: same as NC401k
- Enroll, change or stop participation at anytime
- IRS contribution limits apply
  - Aggregated 403b/401k limit
  - 457 stands alone

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Health Insurance

North Carolina State Health Plan
State Health Plan of North Carolina

- Three health plan options administered by Blue Cross and Blue Shield of North Carolina (BCBSNC)
  
  **Traditional 70/30 PPO Plan**
  - Higher co-pays, coinsurance & deductibles
  - No cost to full-time employee for employee only coverage
  
  **Enhanced 80/20 PPO Plan**
  - Lower co-pays, coinsurance & deductibles
  - Affordable Care Act (ACA) preventive care services and medications are covered at 100%
  - Wellness premium credits reduce the subscriber premium
  
  **Consumer-Directed Health Plan**
  - High deductible health plan with a health reimbursement account
  - ACA preventive services/medications covered at 100%
  - Wellness premium credits reduce the subscriber premium

Coverage is not automatic, you must enroll!

- Enroll on-line within 30 days: [unc.hrintouch.com](http://unc.hrintouch.com)
- Use UNC Onyen and password
- Part-time employees add $448.12/mo. Premium, full cost
- Two effective date options:
  - First of the month following employment date -OR-
  - First of the second month following employment date
  - *Hired in January, choose February 1st or March 1st*
State Health Plan of North Carolina

- Health insurance premiums are paid one month in advance of coverage
  - Example: January premiums pay for February coverage
- No pre-existing conditions or waiting periods if you enroll when first eligible
- Spouses and legally dependent children up to age 26 are also eligible for coverage under all plans

### 2014 SHPNC Premium Rates

#### Enhanced 80/20 PPO Plan

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<th>All Three</th>
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#### Consumer Directed Health Plan with HRA

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#### Traditional 70/30 PPO Plan

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## Health Plan Options

### Enhanced 80/20 Plan
- The current Standard 80/20 Plan with a new name to match the new features
- $0 ACA Preventive Services
- $0 ACA Preventive Medications
- Reduced medical copay opportunities

### Consumer Directed Health Plan (CDHP) with HRA
- High-deductible medical plan
- HRA offsets the deductible
- 85/15 Coinsurance (after deductible)
- $0 ACA Preventive Services
- $0 ACA Preventive Medications
- CDHP Preventive Medication List ($0 deductible)
- Additional HRA funds for visiting certain providers

### Traditional 70/30 Plan
- The current Basic 70/30 Plan with a new name
- No incentives available
- No $0 ACA Preventive Services
- No $0 ACA Preventive Medications

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## Focus On Wellness

### Enhanced 80/20 Plan
Wellness premium credits when:
- Completes Health Assessment
- Employee attests for themself and spouse to not smoking or to being in a smoking cessation program
- Selects a Primary Care Provider (PCP) for self and all dependents

Additional wellness incentives
- $15 copay reduction for utilizing the PCP (or someone in that practice) listed on the ID card
- $10 specialist copay reduction for Blue Options Designated Specialist
- $0 inpatient hospital copay for Blue Options Designated Hospital

### Consumer Directed Health Plan (CDHP) with HRA
Wellness premium credits when:
- Completes Health Assessment
- Employee attests for themselves and spouse to not smoking or to being in a smoking cessation program
- Selects a Primary Care Provider (PCP) for self and dependents

Additional wellness incentives
- $15 added to the HRA when the PCP (or someone in that practice) listed on the ID card is seen
- $10 added to the HRA when a Blue Options Designated Specialist is seen
- $50 added to HRA when a Blue Options Designated Hospital is used for inpatient services

### Traditional 70/30 Plan
- No incentives available
- No $0 ACA Preventive Services
- No $0 ACA Preventive Medications
Wellness Premium Credits

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<th>How to Complete It</th>
<th>When Members Can Take It</th>
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<tr>
<td>Employee selects a Primary Care Provider (PCP) A PCP must be selected for each dependent.</td>
<td>Visit <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> to select a PCP. If members have trouble locating a provider, they can contact 888-234-2416.</td>
<td>Changes to PCP can be made at any time. (Takes up to 5 days to update)</td>
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<tr>
<td>Employee completes a confidential Health Assessment (HA)</td>
<td>Health Assessments can be completed online at: <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> once the member ID number is generated following initial enrollment or by phone at 800-817-7044.</td>
<td></td>
</tr>
<tr>
<td>Employee attests to being a non-smoker/commits to a cessation program and attests for spouse if applicable</td>
<td>Through the online enrollment system. Log into <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> to complete the attestation.</td>
<td>To quit smoking, the Plan offers assistance through QuitlineNC. Members can access at: <a href="http://www.QuitlineNC.org">www.QuitlineNC.org</a> or call 800-QUIT-NOW (800-784-8669)</td>
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SHPNC Prescription Coverage

- Prescription coverage provided by Express Scripts for the Enhanced 80/20 PPO Plan and Traditional 70/30 PPO Plan:
  - Generic: $12 co-pay, up to 30-day supply
  - Preferred Brand-name: $40 co-pay, up to 30-day supply
  - Non-preferred Brand-name: $64 co-pay, up to 30-day supply
  - Specialty: 25% coinsurance up to $100, 30-day supply
- CDHP Prescriptions are covered at 15% after individual deductible is met
  - ACA Preventative Medications are covered at no cost
  - CDHP Preventative Medication has no deductible, only 15% coinsurance
NC Health Choice for Children

- Families who make too much money to qualify for Medicaid but too little to afford rising health insurance premiums can get free or reduced-price comprehensive health care for their children through the *North Carolina Health Choice for Children program*

- For additional information or questions call 1-800-422-4658 or go online at [http://www.dhhs.state.nc.us/dma/cpcont.htm](http://www.dhhs.state.nc.us/dma/cpcont.htm)

State Health Plan of North Carolina

- State Health Plan Website: [www.shpnc.org](http://www.shpnc.org)

- All employees must complete online enrollment at [unc.hrintouch.com](http://unc.hrintouch.com) to select the Traditional 70/30 PPO Plan, the Enhanced 80/20 PPO Plan or the Consumer Directed Health Plan

- The State Health Plan and NCFlex share a single portal for benefit plan changes and enrollment.
NCFlex Enrollment

- NCFlex voluntary programs provide a variety of plans
- Participants pay the full cost of coverage through payroll deductions before taxes are withheld
- Plans are effective the 1st of the month after hire date
- Programs include:
  - Dental Insurance & Vision Insurance
  - Flexible Spending Accounts (Health and Dependent Day Care)
  - Cancer & Critical Illness Plans
  - Group Term Life Insurance
  - Core AD&D and Voluntary AD&D Insurance
- Enroll online at: [http://unc.hrintouch.com/](http://unc.hrintouch.com/)
Health Care Flexible Spending Account  p.7

- Set aside money through pre-tax contributions to pay for eligible out-of-pocket medical, dental and vision expenses:
  - Deductibles
  - Co-pays and coinsurance
- Contribute from $120 to $2,500 annually
- Convenience card (debit card) for all participants
- Full election amount is available on the effective date
- “Use it or lose it” rule: you forfeit any unused contributions
  - Expenses can be incurred between January 1, 2014 to March 15, 2015 and claims must be submitted by April 30, 2015.

Dependent Day Care Flexible Spending Account  p.11

- Set aside money through pre-tax contributions to pay eligible child care and adult day care expenses for:
  - Qualifying child(ren) under age 13
  - Qualifying child(ren) of any age, spouse or other dependent who meets specific eligibility requirements which take into account disability, residence and financial support
- You may contribute from $120 to $5,000 per year
  - To learn more about tax implications, review page 13
- Expenses must be incurred and funds must be available to receive reimbursement
- “Use it or lose it” rule; you forfeit any unused contributions
  - Expenses can be incurred between January 1, 2014 - March 15, 2015 and must be submitted by April 30, 2015
Dental Plan  p.15

- Coverage provided through United Concordia
- Choose from two plan options:
  - High Option
    - Higher premium, more robust benefits including orthodontia coverage for kids under 19
  - Low Option
    - Lower premium, reduced benefits, no orthodontia coverage
- Under both options:
  - Visit any provider
  - You or your dentist may file claims
  - Review “Benefit Waiting Periods” chart (pg. 17)!

Vision Insurance  p.19

- Coverage provided through Superior Vision Services
- Choose from three coverage options:
  - Core Wellness Exam: Available to employees at no cost and includes an annual comprehensive eye exam for a $20.00 co-pay.
  - Basic Plan: Exam and Materials plan that offers reduced premiums and $20.00 co-pay on contact lens exam and eyeglass frame allowance to $125 retail and calendar year frequency.
  - Enhanced Plan: Enhanced Exam and Materials plan that offers reduced premiums, a $20.00 co-pay on contact lens exam and an eyeglass frame allowance to $175.00 retail.
Other NCFlex Insurance Plans  p.23

- **Critical Illness Insurance**  pg. 23
  - Pays lump sum benefit in event of certain health conditions based on three categories
  - Age-based rates

- **Cancer Insurance**  pg. 26
  - Pays benefits for expenses related to cancer and 29 other diseases/conditions
  - Low, High and Premium options
  - Preventive, wellness and screening benefits available

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Accidental Death & Dismemberment Plans

- **NCFlex plan provided through A.C. Newman**
  - Core AD&D (pg. 29)
    - $10,000 of coverage at no cost
    - Must enroll!
  - Voluntary AD&D (pg. 31)
    - Coverage for employee and dependents up to $500,000

- **UNC Plan provided through Reliance Standard**
  - After tax plan that offers dependent coverage for spouse, domestic partner and child(ren)
  - Participants can elect coverage in amounts of $10,000 to $500,000, not to exceed ten times their annual salary
NCFlex Group Term Life Insurance  p.33

- Group Term Life Insurance
  - Employee only coverage in $10,000 increments, from $20,000 to $500,000 (limited to 5x salary)
  - Coverage over $100,000 subject to Evidence of Insurability (EOI)
  - Age-based rates
  - Dependent coverage is offered on an after tax basis
  - Employee premium will be pre-taxed up to $50,000.

Additional UNC Insurance Plans
MetLife Group Term Life Insurance (after-tax)

- Coverage available in salary multiples from 1 to 7 times annual salary
- Evidence of Insurability is required for coverage in excess of 3 times salary and/or coverage amounts above $500,000
- Age-based rates
- Dependent coverage is available for spouse/domestic partner and child(ren)
- Participants are eligible for Will Preparation and Estate Resolution Services

Income Protection Programs

- Programs designed to provide you with financial protection in the event of disability/long-term illness
- State provided Short Term Disability Plan
- State provided Long Term Disability Plan
- Supplemental Disability plans
  - Liberty Mutual Long Term
  - Standard Long Term
Disability Income Plan of NC (DIP-NC)

- No-Cost disability coverage provided to employees who participate in TSERS or ORP
- **Short-Term Disability**
  - Payable after one year of TSERS or ORP contributing membership
  - Pays 50% of base compensation up to $3,000/month
  - Payable up to 365 days, after 60-day waiting period
- **Long-Term Disability**
  - After five years of contributing membership to TSERS or the ORP
  - Pays 65% of base compensation up to $3,900/month
  - Social Security Disability off-set applies
  - Payable until the earliest date of unreduced retirement benefit eligibility or otherwise no longer eligible.

Supplemental Disability Plans

- Designed to supplement DIP-NC benefits
- 90-day waiting period
- Replaces up to 66-2/3% of base monthly salary up to $10,000
- Voluntary benefit; you pay full cost of coverage after-tax
- Coverage through **The Standard** if you elect ORP
  - Includes continuing ORP contributions into ORP account
- Coverage through **Liberty Mutual** if you elect TSERS
- Enrollment in supplemental plan must correspond with retirement plan selected
Vacation, Sick and Other Leave Programs

Leave

- Information concerning vacation, sick and other leave policies can be found at the Office of Human Resources website at: hr.unc.edu

- Your Benefits Consultant or your HR Representative can provide more information about vacation and/or sick accrual rates
Work/Life & Wellness Programs

As part of our on-going commitment to the health and wellness of employees, the University offers a variety of programs focused on healthy lifestyles and balancing the responsibilities of work and personal life. Programs include:

- Child Care
- Elder Care
- Educational
- Emergency Loan
- Employee Assistance
- Flexible Work Arrangements
- Work Well, Live Well
- Parenting Programs
- Rewards & Recognition

http://hr.unc.edu/benefits/index.htm
Work/Life & Wellness Resources

- University Child Care – 919-929-2662
- Child care resource & referral
  - Orange County – 919-967-3277
  - Durham County – 919-403-6950
  - Wake County – 919-779-2220
- Elder care resource & referral – 877-327-7658
- Parenting programs – 919-962-6008
- Employee Assistance Program
  - The EAP is a confidential counseling and resource program that is designed to help employees and their families
  - Off-site EAP Services: ComPsych (24 hr./day) 877-314-5841
  - Online resources at www.guidanceresources.com

Tar Heel Discounts & Perks

Expand your horizons through a variety of discount programs that provide you access to some of the region’s best arts and entertainment, intercollegiate athletic action and other jewels. Check out our website for information on the latest deals for:

- Arts & Entertainment (Ackland Art Museum)
- Campus Resources (Optical Shop)
- Employee Discounts (Cell Phone Providers)
- Leisure & Recreation (Campus Recreation)

http://hr.unc.edu/benefits/discounts-and-perks/index.htm
Educational Programs

Tuition Waiver Program
- Eligible employees can have tuition waived for two courses per academic year at any of the 17 UNC constituent institutions
- Courses may be taken for career development or for personal interest

Other Tuition Assistance Programs
- Educational Assistance
- Fee Waiver
- Undergraduate Scholarship Programs

College Foundation of North Carolina
- The College Savings Plan allows employees to begin saving money for college for themselves or anyone else they would like
- Account earnings are free from Federal and North Carolina income taxes when the money is used to pay for qualified higher education expenses

Work Well, Live Well

An employee wellness program focused on overall health in four areas:

- **Mind**
  - Learn ways to reduce stress and discover more positive, enthusiastic focus on life and self.

- **Body**
  - Programs and resources to support and encourage a healthy lifestyle for all employees.

- **Balance**
  - Supporting and encouraging employees as they strive to achieve personal satisfaction at work and in daily life.

- **Community**
  - Programs and initiatives that enable employees to contribute to the welfare of the surrounding community.

Visit our website: http://go.unc.edu/workwell
Important Deadlines & Reminders

Enrollment Deadline

- On-line enrollment for Health and NCFlex benefits must be completed within 30 calendar days of your eligibility (hire) date.

- Enrollment forms for any University benefits you elect must be received in the Benefits Services Office within 30 calendar days of your eligibility (hire) date.
Important Reminders

- Each new employee’s address defaults to:
  - 104 Airport Drive, Chapel Hill, NC 27599
- Change the permanent/home address online at: http://dir.unc.edu
- Use HR Connect (hrconnect.unc.edu) to identify your Benefits Consultant
- Notify your Benefits Consultant of any problems you may have completing the online process

Important Websites

- Human Resources Website: hr.unc.edu
- HR Connect to identify your Benefits Consultant: hrconnect.unc.edu
- Campus Directory: dir.unc.edu
- State Health Plan: shpnc.org
- NCFlex Information and Forms: ncflex.org
Enrollment Websites & Effective Dates

- NCFlex and State Health Plan Enrollment/Changes: [http://unc.hrintouch.com/](http://unc.hrintouch.com/)
- Teachers & State Employees Retirement System: [http://myncreirement.com/](http://myncreirement.com/)

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<tr>
<td>ORP</td>
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EPA Non-Faculty Programs, Policies and Services
Facts About Carolina

- The University of North Carolina at Chapel Hill was the nation’s first state university and the only public university to award degrees in the 18th century.
- January 2013 - Ranked 1st among the 100 best U.S. public colleges and universities by Kiplinger's Personal Finance magazine.
- Ranks among the top U.S. public universities in research support. Research funding has become the University’s largest revenue stream – a great tribute to the success of the faculty and a multidisciplinary approach to advancing knowledge and science.

Campus Populations

- 3,221 Faculty
- **1,890** EPA Non-Faculty
- 6,644 SPA
- 11,222 Temporary
- 21,786 Total Employees (Fall 2012)
- 29,278 Total Students (Fall 2012)
UNC-CH Schools, Colleges and Centers

- College of Arts & Sciences
- Dentistry
- Education
- Eshelman School of Pharmacy
- Friday Center for Continuing Education
- Gillings School of Global Public Health
- Graduate School
- Kenan-Flagler Business School
- Government
- Information & Library Science
- Journalism & Mass Communications
- Law
- Medicine
- Nursing
- Social Work
- Summer School
- Plus 113 research centers and institutes

Office of Human Resources

Your online resources for Human Resources information:

Main website - http://hr.unc.edu

Contact lookup - http://hrconnect.unc.edu/

EPA Non-Faculty Policies - http://hr.unc.edu
   Keyword: EPA non faculty

EPA Non-Faculty Handbook -
http://hr.unc.edu/files/2013/05/EPANF-handbook-5-1-13.pdf
Office of Human Resources (OHR)

Benefits, Work Life and Employee Records 962-3071
- Administers programs such as health, dental, disability, retirement, tuition waiver and leave, work-life and wellness programs, employee discount, employee assistance program and recognition programs
- Responsible for maintaining the official employee state file for all employees and also provides employment verifications and information regarding Total State Service Date

Business Office 843-2300
- Manages the accounting and finance functions for OHR
- HR Service Center provides assistance to applicants and campus clients

Classification and Compensation 843-2300
- Responsible for position classification, compensation analysis and pay philosophies

Communications & Talent Development 962-2550
- HR Communications provides information about HR programs, policies and services to the Carolina community, and maintains the OHR website
- Training & Talent Development offers a wide variety of professional development classes for University faculty and staff. See class listings and register at [http://www.training.unc.edu](http://www.training.unc.edu)

Employee & Management Relations 843-3444
- Responsible for performance and conduct consultations, disciplinary actions, performance management issues, and dispute resolution

Employment & Staffing 843-2300
- Responsible for SPA recruitment and hiring process
- I-9/EEV services, EEO reporting, new employee orientation and on-boarding

EPA Non-Faculty Human Resources 962-2897
- Specializes in the personnel needs of EPA Non-Faculty, including, but not limited to new employee orientation and on-boarding
- For EPA Non-Faculty Terms and Conditions of Employment:
  - Main website - [http://hr.unc.edu](http://hr.unc.edu) - Keyword: terms and conditions

HR Information Management 843-2300
- Provides support, documentation, training for HR applications (HRIS/InPower, EPAWeb, HR Data Warehouse) and systems development
What is a Department HR Office?

Each department has an HR lead and support personnel that function as liaisons between your department and the Office of Human Resources. Your HR Representative is your point of contact for general HR issues, pay/timesheet questions, parking, personnel actions, and other HR questions.

http://hr.unc.edu
Keyword: HR Representative

Equal Employment Opportunity (EEO) Policies
Equal Employment Opportunity and Affirmative Action

- The Equal Opportunity/ADA Office seeks to facilitate a welcoming and inclusive environment which supports the right of every member of the Carolina community to learn and work in an atmosphere that promotes fairness, equity and access to its employment and educational programs.
- The Equal Opportunity/ADA Office, in partnership with Accessibility Resource Services and Facilities Planning and Construction, has produced a UNC-CH accessibility map. The map displays access information for the main campus buildings and is available online at: [http://equalopportunity-ada.unc.edu](http://equalopportunity-ada.unc.edu)

Equal Employment Opportunity and Affirmative Action

The University is committed to providing an inclusive and welcoming environment for all members, where decisions affecting employment and education are based on an individual’s abilities and qualification. The University has a policy prohibiting discrimination on the basis of:

- Race
- Color
- Religion
- National origin
- Creed
- Veteran’s status
- Disability
- Gender
- Age
- Sexual orientation
- Gender identity
- Gender expression

The policy can be found online at [http://www.unc.edu/campus/policies/nondiscrim.pdf](http://www.unc.edu/campus/policies/nondiscrim.pdf)
Diversity & Multicultural Affairs Office

- The University works to assure that it has a complement of students, faculty, and staff that broadly reflects the ways in which people differ. We speak of these differences as representing “diversity.”

- The University provides an environment where all members of a diverse community feel welcomed and feel free to express their ideas without fear of reprisal.

Diversity & Multicultural Affairs
Ground floor of South Building, Cameron Avenue
CB 9125
919-843-6086 (Phone)
919-843-5564 (Fax)

Harassment and Discrimination

- The University recognizes the rights of all members of the University community to learn and work in an environment that is free from harassment and discrimination based on his/her protected status as described above.

- Any harassment or discrimination of University students, and employees, including faculty, EPA Non-Faculty, SPA employees, post-doctoral scholars, and student employees is prohibited.

- This policy also prohibits retaliation against an individual who in good faith utilizes the procedures herein included as appendices and/or participates in any investigation related to an allegation of prohibited harassment or discrimination.
Americans with Disability Act (ADA) and Veteran’s Policies

- The University of North Carolina maintains an Equal Opportunity and Affirmative Action program to ensure that any employee or applicant for employment with mental or physical disabilities is not discriminated against.
- This program also includes any disabled veteran, veteran of the Vietnam Era or other qualified veteran.
- It is also the policy of the University to provide reasonable accommodations in employment to qualified individuals with disabilities, unless the accommodation would impose an undue hardship on the operation of the University’s business or would change the essential functions of the position.

Employment of Related Persons (Nepotism)

- It is the University’s policy that no family member may occupy a position which has influence over another’s employment, transfer, promotion, salary administration or other related management.
- This means that the managers making decisions about an employee’s wages, hiring and firing, must not be related to that employee.
- “Related” here includes relationship by blood or marriage that is closer than aunt, uncle or cousin, and includes all step-, half- and in-law variations of these.
Improper Relationships: Students and Employees
Supervisors and Employees

- The University prohibits amorous or sexual relationships between employees and:
  - students they evaluate or supervise by virtue of their teaching, research, administrative or other employment responsibility
  - students who are minors below the age of 18
  - their supervisors (to avoid the appearance or occurrence of bias in work relationships)
- Employees may not supervise or evaluate individuals to whom they are related by blood, law or marriage.
- If you know of improper relationships, notify your supervisor or department head immediately.
- If you are uncomfortable doing so, notify your OHR Employee & Management Relations Consultant at 843-3444 immediately.

Equal Employment Opportunity and Affirmative Action

Who do I notify in the event of perceived discrimination?
- Supervisor
- Human Resources Representative
- OHR/Employee and Management Relations: 843-3444
- Equal Opportunity/ADA Office
  100 E. Franklin Street
  Unit 110, CB #9160
  919-966-3576 (Phone)
  919-962-2562 (Fax)
- OHR/EPA Non-Faculty Human Resources: 962-2897
Equal Employment Opportunity Institute

- The Equal Employment Opportunity Institute (EEOI) provides managers and supervisors with:
  - An awareness and knowledge of equal employment opportunity laws.
  - A conceptual understanding of a manager’s role and responsibility in eliminating discrimination and incorporating equal employment opportunity practices into employee-related management decisions.
- Mandatory training:
  - EEOI 1 is for all managers and supervisors (1 ½ days).
  - EEOI 2 is for executive-level employees only (1 day).
- For more information about the EEOI, contact the Equal Opportunity/ADA Office at 966-3576. To register, please visit: http://equalopportunity-ada.unc.edu/equal-opportunity-training/CCM1_030759.

Sexual Harassment Training

- The sexual harassment training is an interactive computer tutorial that offers a convenient and practical means of educating employees and supervisors about sexual harassment and associated legal issues.
- The program is mandatory for managers, supervisors and department chairs. New managers and supervisors should complete the training within thirty days of their start date.
- Link to complete the training is located online at: http://equalopportunity-ada.unc.edu/equal-opportunity-training/index.htm
EPA Non-Faculty
Programs, Policies and Services

Exempt from the Personnel Act

- **EPA** = Exempt from the Personnel Act
  - Governed by UNC Board of Governors
  - EPA Faculty (e.g., professors)
  - EPA Non-Faculty
    - Instructional, Research & Public Service (IRPS)
    - SAAO (Senior Academic & Administrative Officers)
    - EPA Students
    - Postdoctoral Research Associate/Postdoctoral Trainee

- **SPA** = SPA employees are Subject to the Personnel Act, and are commonly known as “staff” employees.
EPA Non-Faculty Employee Categories

- **Instructional, Research & Public Service (IRPS)** includes employees whose position deliver the core-mission activities of the University: creating and disseminating knowledge through direct instruction, research, and public service; or performing professional-level duties that are integral to and uniquely supportive of that work. The purpose of each such position must be substantially engaged in the regular academic, educational, research, or public-service/extension activities of the University.
  - Positions that fall under the Instructional, Research & Public Service (IRPS) category include Academic Advising & Assessment, Academic Preparation & Enhancement, Academic Standards, Continuing Education, Counselors, Instruction, Laboratory Management, Professional Librarians, Research Administration & Compliance, Student Support Services, Technology Transfer, Physicians and Dentists, etc.

- **Senior Academic and Administrative Officers (SAAOs)** are characterized as individuals responsible for leadership of major campus-wide administrative offices common to other institutions of higher education. Typically, such individuals have policy making authority for the university.
  - SAAO (Tier I) category include Chancellor, Vice Chancellors, Provost, and Deans.
  - SAAO (Tier II) category include Associate/Assistant Vice Chancellors, Associate/Assistant Deans, and Associate/Assistant Provosts
  - Directors of institution-wide offices/functions, and development and fundraising staff also fall under the SAAO Tier II category
Position Classification & Compensation Policies

Position Classification

- In accord with UNC General Administration guidelines, all positions (permanent and temporary) must be classified into one of two job categories based on assigned job duties: Instructional, Research & Public Service (IRPS) and Senior Academic and Administrative Officers (SAAOs).
- A position is considered to qualify for a specific classification if at least 50 percent of the position’s primary duties and functions satisfy the job content and criteria specified by the University’s EPA Non-Faculty position classification guidelines. An employee’s assigned job category is normally reflected in their appointment letter.
Appointment Letter

- Every appointment to a EPA Non-Faculty permanent position requires a letter of appointment that fulfills the key terms and conditions of your appointment, such as:
  - annualized salary
  - leave entitlement
  - provisions for funding contingencies if applicable
  - notice that the appointment is "employment at will" or for a stated term
  - notice that the appointment is contingent on criminal conviction check and credential check
  - notice that employment is subject to EPA Non-Faculty policies

Terms of Appointment

- EPA Non-Faculty employees are generally appointed on an at-will basis. In limited exceptions, term appointments of one to five years may be granted for certain categories of jobs like librarians and coaches due to the unique aspects of these professions. Term appointments for research and instructional positions require prior approval.
- Individuals hired into at-will appointments are employed on an indefinite basis, but may be separated at any time, for any permissible reason. Discontinuation is at the recommendation of the Department Head with the approval of the Chancellor or his designee provided that appropriate notice requirements are satisfied.
Notice Requirements

- In the event of a separation, the amount of notice the University is required to give is based on the length of service and the nature of the separation.
- The following minimum written notice is required for employees whose at-will appointment is discontinued:
  - 30 calendar days during the first year of service
  - 90 calendar days during second or subsequent years of service
- Notice requirements are waived in the event a funding contingency is exercised; in which case a 30-day courtesy notice is requested

Funding Contingency

- May occur when an employee’s position is funded largely (or entirely) by sources other than State budget funds or permanent trust accounts
- Must be included in the letter of appointment provided to the employee
- Examples of these types of funds would be grants from government institutions (such as the National Institutes of Health) or corporate donors, which can be discontinued without advance notice to the University
Minimum Salary Requirements for EPA-NF

- EPA Non-Faculty employees are paid on a monthly basis. All EPA Non-Faculty positions, both part- and full-time, are subject to certain minimum salary requirements, which arise from the Federal Fair Labor Standards Act (FLSA) and the University’s own compensation policies.
  - FLSA minimum annual salary is $23,660
  - Prorated to $1,972 per month, or $455 per week
  - Minimum is regardless of work schedule
  - Applies to permanent and temporary employees
- **Note:** EPA Non-Faculty compensation guidelines require a minimum salary of $30,000 on an annualized basis for all permanent full-time appointments.

Fair Labor Standards Act

- EPA Non-Faculty are exempt employees and may be asked to work beyond a 40-hour work week
- Wage-hour exempt:
  - Salaried
  - Not covered by overtime, federal minimum wage and time record provisions of the Act
  - Complete leave usage in TIM system
Base Pay
The appointing unit is responsible for establishing the initial annualized salary at the time of hire and initiating any changes in this salary, subject to compensation policies adopted by the Board of Governors of the University of North Carolina or Board of Trustees of the University of North Carolina at Chapel Hill.

Salary Increases
The annual raise process (ARP), which typically occurs in the late summer or fall of each year, allows for pay increases authorized by the legislature and UNC General Administration. Departments plan for and use the EPA annual raise process (ARP) to implement adjustments for EPA employees. Departments may also propose salary increases at other times and for other reasons in consultation with the Office of Human Resources.

Other Types of Pay
- Salary increase request for EPA Non-Faculty
- Lump-sum payments (awards/overloads/supplement)
- Secondary appointments
- Dual employment
- External professional activities for pay
Holidays for EPA Non-Faculty

- The State provides 11 paid holidays each calendar year. However, if Christmas Day falls on a Tuesday, Wednesday or Thursday, the State provides 12 paid holidays for that calendar year.
- Please note that certain clinical departments of the School of Medicine have a modified holiday schedule for their employees. Clinical departments will communicate any such modified holiday schedule directly to their employees.

Sick Leave

- EPA Non-Faculty employees are entitled to 12 days of sick leave per calendar year.

Annual Leave

- All permanent EPA Non-Faculty employees working half-time (20 hours per week) or greater are eligible to earn annual leave.
- EPA Non-Faculty Instructional, Research & Public Service (IRPS), and Tier II senior academic and administrative officers (SAAOs) are entitled to 24 days of annual leave per calendar year.
- The maximum number of annual leave that may be accrued and carried forward from one year to the next is 30 days; unused annual leave in excess of 30 days shall be converted to sick leave on December 31 of each year.

* Different vacation accrual applies to Tier I Senior Officers.
Total State Service Credit

- Grand total of all Permanent, Probationary, and Trainee time, Full-time or Part-time (regular scheduled 20 hours or more per week) served in State Government or other recognized public sector system
- Does not have to be continuous. Breaks in service not counted in computation for credit
- Used for determining eligibility for:
  - Vacation leave earning rates
  - Service Appreciation Program Awards
  - Annual Leave Payout

Time is credited for employment with:

- Any State agency
- Any governmental unit now a State agency, i.e. Judicial System, county highway maintenance forces
- County Agricultural Extension Service
- Community College or public school system
- North Carolina General Assembly, and
- Other public sectors as directed and approved by OSP
Total State Service Credit

- Benefits, Work Life and Employee Records maintains Service Credit records.
- **Creditable Service Form** must be completed in order to identify service credit and verified by Benefits, Work Life and Employee Records.
- Form is located and may be accessed from our website: http://hr.unc.edu/form-finder/employee-records-forms/
- Contact: Benefits, Work Life and Employee Records at 962-3071

Work Schedules

- UNC-Chapel Hill’s business hours are from 8:00 a.m. to 5:00 p.m.
- Department heads are responsible for establishing and adjusting work schedules to meet program and operational needs. It is your responsibility to follow established work schedules
- Employees in certain positions at the University may have the option of using flexible work arrangements allowing for an employee’s schedule and/or place of work to change to accommodate the needs of the employee or department
- Changes are subject to business needs and made at the discretion of the employee’s manager or supervisor, as appropriate
Time Information Management System

- The University’s official pay records, required by the Fair Labor Standards Act (FLSA), are retained in TIM, an electronic software solution for recording and processing leave and time for all UNC-Chapel Hill employees.
- Computer-based training (CBT) is available for all employees at http://finance.unc.edu/financedivision/training/training-overview

Performance Management
Performance Management

An annual written performance evaluation is required for all permanent EPA Non-Faculty employees. This review covers the period from July 1 until June 30 of the following year.

- Not required for those in position fewer than three months
- May be provided with a document outlining the position’s duties, performance expectations and any initial observations that may assist the employee in understanding expectations going forward
- Employees will be able to comment in writing on the document, and upon request, these comments will be entered in the department’s personnel file

Dispute Resolution & Grievance
Dispute Resolution

- The University is committed to fair and equitable treatment for all employees. Employees may request mediation with a manager, coworker or staff member, or report an incident that may have subjected a member of the UNC-Chapel Hill community to a discriminatory or otherwise troubling situation.
- EPA Non-Faculty employees may file a grievance as outlined on the EPA Non-Faculty grievance policy webpage if they feel their concern has not been or cannot be addressed adequately.

Dispute Resolution Programs

- EPA Non-Faculty Dispute Resolution & Grievance – 962-2897
- Mediation (OHR) – 843-3444
- Ombuds Office – 843-8204
- Equal Opportunity / ADA Office – 966-3576
- Employee Assistance Program
  - ComPsych EAP Service (24 hours a day)
    - 800-697-0353
- Policy-defined grievance & appeals programs
  - http://hr.unc.edu
  - Keyword: epa grievance
Ombuds Office

- University Ombuds Office
  - 134 East Franklin Street, CB# 5146
  - Chapel Hill, NC 27599-5146
  - 919-843-8204; 919-843-8219 Fax
  - ombuds@unc.edu; www.ombuds.unc.edu
- The University Ombuds Office is a place where all Carolina staff, faculty and administrators are welcome to come to and talk in confidence about any workplace issue, concern, problem or dispute. The Ombuds Office supplements, but does not replace, the University’s formal channels.

Conflict of Interest

- This policy provides guidelines for relationships between the University and its faculty, staff and students with external organizations. As members of the campus community, employees are expected to ensure academic integrity and avoid conflicts that:
  - Have potential to directly and significantly affect the University's interests
  - Compromise objectivity in carrying out University responsibilities
  - Compromise performance of University responsibilities, unless such conflicts are disclosed, reviewed, and managed in accordance with policy
  - Impair performance of our mission of teaching, research, and public service, as well as jeopardize public trust and support
- A direct link to the policy, procedures and online disclosure can be found at https://cfx3.research.unc.edu/coi/index.cfm
Reporting of Criminal Convictions for Currently-Employed EPA Non-Faculty

- To ensure a safe and secure environment, it is mandatory that all employees report any criminal convictions occurring after they have been formally offered and begin employment. A conviction, in this case, means:
  - Any acknowledgement of criminal responsibility, including prayers for judgment
  - Registration as a sex offender with any governmental authority - even for a prior offense
  - Any convictions or pleas that are acknowledgments of criminal responsibility within the jurisdiction of a criminal court
  - Includes moving violations for employees hired into positions with driving responsibilities
  - This policy does not override or limit more stringent policies or protocols that may be applicable to employees

Illegal Drugs / Weapons

- It is illegal for an employee to possess, sell, deliver or manufacture controlled substances in the State of North Carolina
- All weapons, including concealed firearms with permits, are prohibited on the UNC-Chapel Hill campus and other University property
- Employees are subject to disciplinary action, up to and including dismissal for one offense while employed
Workplace Violence

- UNC-Chapel Hill is committed to providing a workplace that is free from violence by establishing preventative measures, by holding perpetrators of violence accountable, and by providing assistance and support to victims.
- Any form of violence as defined in the policy may be cause for disciplinary action, up to and including dismissal, as unacceptable personal conduct.
- An Employee Threat Assessment and Response Team evaluates both immediate and potential threats of workplace violence.

Adverse Weather Policy and Essential Employees
Adverse Weather

- The adverse weather policy is always in effect. EPA Non-Faculty employees may work from home with supervisor’s approval
- Three condition levels:
  - Condition I: Classes are held; employees report to work
  - Condition II: Classes are canceled; employees report to work
  - Condition III: University is closed; classes are canceled; employees do not report to work
- Checking the condition level:
  - Hotline: 919-843-1234 or UNC homepage at www.unc.edu
  - 91.5 WUNC-FM or wunc.org
  - News outlets: Look for “UNC-Chapel Hill” only – other “State Government” listings do not apply to us

Emergency or Essential Employees

- Your department will provide advance written notice if your position has been designated as “emergency”
- Must report for adverse weather, pandemic and communicable disease events
- Required to report for work as scheduled to provide critical services no matter what condition level is in effect
Alert Carolina

- Alert Carolina is the source for information in an immediate life-threatening or serious situation involving safety on the UNC-Chapel Hill campus. The University’s emergency notification system communicates in multiple ways with students, faculty and staff in a confirmed emergency situation:
  - Emergency Warning: Issued for significant emergency or immediate threat; sirens sound, text message sent. Follow instructions provided
  - Timely Warning: Issued for continuing danger affecting campus community; text message sent
  - Informational Message: Issued in non-emergency situations where there is not an immediate threat but there may be significant interest
- Contact: alertcarolina.unc.edu
HR Records and Information

- Based on established business practice at UNC-Chapel Hill, the contents of an individual's EPA Non-Faculty personnel file may be located in various University offices including the employee's primary or secondary appointing department. All requests for access to EPA Non-Faculty personnel files must be directed to HR Records in the Office of Human Resources.

- The University is required to provide public information when requested for all University personnel. Public information includes the following:
  - name
  - age (not date of birth)
  - current department
  - date of original employment with the State
  - current classification title
  - current salary

- For a detailed list of public information items, please refer to the Summary of EPA Non-Faculty Policies. Information regarding employees not specifically identified as public information is considered confidential under State law.

Privacy of Electronic Information

- The use of electronic resources includes instruction, research, service, and the official work of the University. The e-mail system, and all messages sent and received using that system, remains the property of UNC-Chapel Hill, and is not “private” or “personal” to its employees in any legal sense.

Personal Use

- As state employees, employees must be aware of their actions and any effect these may have on public trust. The use of University facilities, vehicles and equipment (telephones, computers, email) should be for official purposes only. No employee may use University funds, vehicles, equipment or other resources for partisan political activities. Employees should consult with their supervisors in advance if they have questions about the appropriateness of certain practices.
Training and Talent Development

- Provides many learning opportunities designed to develop and enhance essential workplace skills and increase job effectiveness. By developing our workforce, UNC-Chapel Hill provides rewarding careers for its employees and ensures that the University has the necessary skills and knowledge to take us into the future.
- Training programs are free to all full-time EPA and SPA employees.
- Available courses include supervisory and leadership skills, interpersonal skills, and HR policy and procedures.
- Register at [www.training.unc.edu](http://www.training.unc.edu)

Department of Public Safety

- Carolina’s Department of Public Safety is an accredited law enforcement agency dedicated to the welfare of the University community. The department is responsible for:
  - Public safety
  - Parking services
  - Transportation services
  - Special event information
- For general information (Mon-Fri 7:30 a.m.-5 p.m.)
  - 919-962-3951 or [http://www.dps.unc.edu/](http://www.dps.unc.edu/)
- For emergency assistance: Dial 911
UNC Park & Ride Fees

- Effective 8/15/2013, UNC will implement Park & Ride permits.
- Park & Rides will remain first-come, first serve to allow users to choose the most proximate and available spot.
  - There is a fee associated with the park & ride permit.
  - Purchase $1 daily, $5 weekly, or annual P&R permits.

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<td>$227</td>
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<td>$25K - $50K</td>
<td>$250</td>
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<td>$50K - $100K</td>
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<tr>
<td>Academic Cost</td>
<td>Annual Cost</td>
</tr>
<tr>
<td>$170</td>
<td>$227</td>
</tr>
</tbody>
</table>

Temporary permits will be available at $1/day or $5/week.

Permanent employees may choose to payroll deduct permit fees on a **pre-tax** basis.

Register for Employee Commuter Alternative Program (CAP) with the Department of Public Safety (DPS).

Regional Park & Ride will remain free

- Triangle Transit or Chapel Hill Transit's PX route from Lowe's in Pittsboro.

For more information and to register go to: [www.dps.unc.edu/Transit/transitnav.cfm](http://www.dps.unc.edu/Transit/transitnav.cfm).
Campus Safety Report

- UNC-Chapel Hill's annual security report is available online at the Department of Public Safety website (http://www.dps.unc.edu/) or in hard copy by request to the Department of Public Safety.
- The report, required of all universities by federal law, discusses crime statistics, procedures for reporting suspicious or criminal activity, security, police authority, crime prevention strategies, university policies on substance abuse and sexual offenses, workplace violence and fire safety.

Environment, Health & Safety (EHS)

- Responsible for environment, health and safety functions, including required training. The safety course is a requirement for all new employees and can be completed online.
- Department heads, faculty members and supervisors are directly responsible for maintaining full compliance with State and Federal regulations and University safety policies and procedures.
- Healthcare employees are required to comply with the University’s EHS policy regarding vaccines, medical surveillance or other required safety training within the first 10 days of your employment. Information can be found at http://ehs.unc.edu

Environment, Health & Safety
1120 Estes Drive Extension, CB#1650
Chapel Hill, NC 27599
Phone 919-962-5507, Fax 919-962-0227
State Employees’ Credit Union

- You and your family may become members of the State Employees’ Credit Union (SECU) by establishing a share account with a minimum deposit of $25.
- Contact SECU to establish an account or for more information go to [http://www.ncsecu.org/](http://www.ncsecu.org/)
- **Call Center**: (888) 732-8562 or (919) 857-2150
  Fax: (888) SECU FAX or (919) 857-2000
- **Branch Hours**: Mon–Fri 8:30 a.m.– 5:30 p.m.

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UNC Onyen and Computing Services

- Each employee at the University has an Onyen (Only Name You’ll Ever Need) to provide single-sign-on privileges to most University systems
- At the Onyen website ([http://onyen.unc.edu/](http://onyen.unc.edu/)) you can:
  - Change or reset Onyen password
  - Sign up for Alert Carolina notifications
  - Set vacation message and forward email
- For assistance call (919) 962-HELP or visit [http://onyen.unc.edu/](http://onyen.unc.edu/)
- Information security is the responsibility of the Information Technology Services department; visit [http://its.unc.edu](http://its.unc.edu) for more information. All University faculty, students, staff, and visitors who have access to University-owned or managed information through computing systems or devices must maintain the security of that information/systems/devices. All UNC employees should read the University IT Security Policies and learn how to identify and manage situations in which the University’s sensitive information may be at risk.
Reminder

Have you initialed the orientation roll sheet to confirm your attendance?

Welcome to UNC-Chapel Hill!

Please share your thoughts on today's orientation session by completing a short survey at the link below. Your feedback is important and will assist the Office of Human Resources in tailoring future orientation sessions.

The survey: http://www.surveymonkey.com/uncneo

Thank you in advance for your participation.

Office of Human Resources
The University of North Carolina at Chapel Hill