eForms HR Officer User Guide

When an employee submits a teleworking request via Connect Carolina the form is set up to go through the following approval routing:

1. Supervisor
2. Department Head (user must be added by the Supervisor)
3. HR Officer
4. Employment & Staffing or Post Doctoral Affairs Office

A notification email is sent to approvers when a form is pending their review indicating that they should log into Connect Carolina and take action on the form.

Approvals

As an HR Officer you will have 2 ways of completing approvals for a Teleworking Request.

Option 1: HR Approval Tile

When logged into Connect Carolina under Self-Service select the HR Approvals tile, the number on the tile will indicate the number of pending forms that require review.

The HR Approvals tile can also be used to view historic approvals. After selecting the HR Approvals tile use the three-circle icon in the top right corner to go to Approval History. A list of all forms that the user has acted on in the last 180 days will display.
Option 2: Worklist

If you have administrative access, the forms pending review also display in the HR Worklist. The Admin Workcenter Homepage hosts the Worklist tile. Select the plus plus sign to see all items that require review. Scroll the list to find HR: Approval Teleworking Requests.

- Select the link for the form you want to review.
The first step is to review all information on the form. If necessary, the HR Officer will be able to modify the Job Description field, Alternative Work Arrangements section and approve or deny the form. If information in any other field is incorrect, the form will need to be denied and submitted again.
When reviewing the form as the HR Officer you want to ensure that the correct Department Head was listed on the form and the HR Representative is listed as well. The default value for the Department Head is the HR officer. This was set up this way to ensure if the Supervisor does not update the Department Head that the form will not go into an error state.

It is the responsibility of the supervisor to update the Department Head field correctly by using the search prompt prior to approving the form. If the Department Head or Supervisor were not listed correctly, or skipped because of lack of data, the HR Officer can add those approvers using the Add Ad Hoc Approvers button on the second page. This is explained in more detail later on.

It is also the responsibility of the Supervisor to update the HR Representative field using the HR Representative search prompt. This search prompt only displays active HR Representatives in the system. The HR Representative listed on the form will receive a notification email, along with the employee, once the form has received final approval. If this field is left blank the HR Representative will not receive formal notification that the process was completed. If there is not an HR Representative listed when the form reaches the HR Officer approval level, the field should be updated.
Expand the comments section to see prior approval comments and add new comments. Select the Next button after verifying and entering any necessary information on the first page of the form.

Select the Next button after verifying the information on the first page of the form. The second page in the evaluate process will allow the user to review approvers and if necessary add approvers.

When viewing the the **Add Ad Hoc Approvers** button it will display the form routing and prior approvals. This view shows that the supervisor was skipped and the form routed directly to the HR Officer. It is now the responsibility of the HR Officer to use the **Add Ad Hoc Approver** button to add in the Supervisor and Department Head to the approval routing.

This type of routing error can occur because the supervisor or reports to field for the employee is blank or the position does not have an incumbent. The default value in the Department Head field is the HR Officer. In this example the form did not route to the Supervisor because of lack of data, and therefore skipped directly to the HR Officer. Using the plus sign button on this page the HR Officer can add the interim supervisor and Department Head to the approval routing.
After selecting the plus sign user the User ID search prompt to add in approvers by ONYEN or Preferred Name.

Skipped
No approvers found
[PAGEREC: SUPERVISOR_OPRID]
09/14/20 6:33 PM

Pending
Debbie HR Officer
[PAGEREC: GSDEPT_HEAD_ONYEN]
09/14/20 6:33 PM

Not Routed
Debbie HR Officer
[PAGEREC: GSHR_OFFICER_ONYEN]

Not Routed
Multiple Approvers
[NC_HC_WF_L3_EMPLOYMENT]
09/14/20 6:33 PM

Insert additional approver
or reviewer

User ID

Approver
Reviewer

Insert
This shows that after adding the new approvers the form will route to the interim Supervisor, the Department Head and then back to the HR Officer.
When finished adding *Ad Hoc approvers* select the done button in the top right corner to take action on the form. Select Approve which will route the form to the next level approver or deny will will send the employee a denial notification.

You can also select the Print option to save or print a copy of the form with all submissions and approvals to date. Select Print and when the Print Report box appears select the Teleworking Request Report Name, then select Print Report.

Scroll to the bottom of the form to see the submission and approval history.

<table>
<thead>
<tr>
<th>Submission and Approval History</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date/Time</strong></td>
<td>2020-09-14-08.15.47.000000</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>jsmith</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>Submitted</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Pending</td>
</tr>
<tr>
<td><strong>Date/Time</strong></td>
<td>2020-09-15-08.30.54.000000</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>ssmart</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>Approved</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Partially Approved</td>
</tr>
</tbody>
</table>
HR/Payroll Reporting Dashboard

In addition to approving forms HR Representatives will have access to two reports related to teleworking requests. These reports can be accessed from the HR/Payroll Reporting Dashboard.

**Reporting**

- Telework Submission
  - This is a report that pulls all details of the submission, approvals, and comments with a prompt by PID or date range.
  - Each form will have multiple lines to represent the submission and each level of approvals. For example, a fully approved form will have 7 or more rows.

- Telework Arrangement Expiring
  - This is a report with a date range prompt that captures employees who will hit their 1-year teleworking arrangement anniversary during that date range. For example, if the report is run with the dates 6/1/2020 – 6/30/2020 the results will show anyone whose teleworking arrangement started 6/1/2019 – 6/30/2019.

If you still have questions regarding the teleworking request policy or approval process please contact HR at (919) 843-2300 or employment@unc.edu.