

HR Rep User Guide – Leave Attachments

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HR Rep Overview

This user guide will show HR Reps how to submit and view employee leave attachments (i.e., leave request forms, medical certification, etc.) in ConnectCarolina. The UNC Leave Administration Team created this online submission format to make leave submissions simpler and more consistent. Leave attachments should be submitted by the employee in ConnectCarolina. If an employee is not able to submit a leave attachment, the employee’s HR Rep may submit the attachment in ConnectCarolina on the employee’s behalf.

HR Rep Access to **Submit** a Leave Attachment

Select the HR WorkCenter Tile on Admin Homepage of ConnectCarolina.



Select the ‘Add Employee Leave Document’ link under the Forms folder.

The image shows a vertical menu titled "Forms" with an upward-pointing arrow. The menu items are: "Add Unpaid Request", "Add Work Location Form", "Add Employee Leave Document" (highlighted with a red rectangular box), "Evaluate Employee eForms", "Update Employee eForms", and "View Employee eForms".

Use the search prompt to find the employee that this form is being submitted for.

The image shows a form titled "Submit Document for Employee : Form ID 2090960". Below the title is the section "Document Information". Underneath, there is a sub-section "Employee" with a horizontal line. At the bottom, there is a search prompt: "*Employee PID" followed by a text input field with a search icon (magnifying glass) and the text "Use Search Prompt to search for employee" in red.

The search prompt allows user to search by PID (Empl ID) or Name.

Search for: Employee PID

▼ **Search Criteria**

Search by ID or Name

Empl ID (begins with)

Name (begins with)

▼ **Search Results**

Users can select the Show Operators link in the top right of the search criteria section to change search from 'begins with' to 'contains'.

▼ **Search Criteria** Show Operators

Empl ID (begins with)

Name (begins with)

Search Criteria Hide Operators

Empl ID

Name

▼ **Search Results**

Empl ID ◇ Name ◇ Company ◇ Department ◇

300 rows

at 300 results can be displayed.

Once an employee is selected their employee information will auto populate.

| Employee | |
|------------------------|---|
| *Employee PID | 730069795  |
| Employee Information | |
| Name | Erica Guestin |
| User ID | eguestin |
| Company | UNC |
| Department | 260108 |
| Department Description | HR Information Mgmt |
| Attach Document | |
| Attachment Type | LV01 |

The instructions section provides detail on how to upload, who can view documents, how comments can be used and where to go for help.

| Instructions |
|--|
| <p>Uploading Attachments: Select upload to add document, a pop-up window will appear. Click My Device to search and select the document you want to submit. Click upload and select done in the top right corner of the file attachment box.</p> <p>Viewing Attachments: Attachments can only be viewed by the employee on the View my Leave Forms link in Self Service and by central HR offices. Some file extensions may pop-up in a new window.</p> <p>Comments: You can provide any additional information in the comments field. Comments are viewable to all users who can access the form and may include employees, central HR offices, or departmental HR representatives.</p> <p>Need Help? Contact the Benefits Support Center at 919-962-3071 or leave@unc.edu</p> |

The file attachment section is where the HR Rep can upload the employee's document or documents. The file size limit is 8000 KB.

File Attachments

1 row

| Status | Upload | Description ▾ | File Name ▾ | Delete |
|--------|---------------------------------------|----------------------|------------------------|---------------------------------------|
| 1 | <input type="button" value="Upload"/> | <input type="text"/> | Choose a Document Type | <input type="button" value="Delete"/> |

The dropdown shows a list of acceptable document types. If the document being submitted does not match an option in the list, the user can select 'Other'. Please see the 'File Attachment Descriptions' section for a list of document type descriptions and examples.

Attachment Type LV01

Need Help?

Contact the Benefits Support Center

File Attachments

| Status | Upload | Description ▾ | File Name ▾ |
|--------|---------------------------------------|----------------------|--------------|
| 1 | <input type="button" value="Upload"/> | <input type="text"/> | Request Form |

- Adoption Forms
- Birth Cert or Cert of Live Birth
- Child Placement
- Custody Order
- Death Certificate
- Disability Forms
- Donation Form
- In Loco Parentis Cert
- Medical Certification
- Military Caregiver Leave Cert
- Military Orders
- Other
- Qualifying Exigency Cert
- Request Form**
- Return to Work

Users can use the add button to add multiple attachments. Users can also add comments to the form in the comments field. Please note that comments are viewable to all users who can access the form and may include employees, central HR offices, or departmental HR representatives.

▼ **Comments**

Add any applicable comments and submit


If trying to submit without adding an attachment, the user will see a message indicating they must attach a document before submitting.

You must attach a document before submitting.

If trying to submit an attachment without selecting a document description, the user will see a message indicating a description is required.

You must select a description for the attachment on row 1.

After submitting the form, the user will see a confirmation page which indicates their submission was successful and the document or documents have now routed to the leave team for review.

 **Submit a Document : Confirmation****Form ID 2091329**

Confirmation



You have successfully submitted a document. Employees can view document submissions on the Benefits Tile in Self Service under the Leave Folder > View My Leave Forms. The submitter and/or employee will receive an email confirming this submission and another email will be sent once the document review is complete.







Empl ID 730069795

Name Erica Gustin


When a form is submitted by an HR Rep the form generates the following email to the employee and the HR Rep. The employee and HR Rep will receive another email when review of this form is complete.

Submit a Document eForm for Erica Gustin (260108 | HR Information Mgmt) has been Submitted

 no_reply@hr.unc.edu
To  Gustin, Erica Lynn

  Reply  Reply All  Forward  

Thu 9/15/2022 10:01 AM



This email is notification that the following Submit a Document eForm was successfully submitted on 09/15/2022.

Form ID: 2090959
Employee: Erica Gustin
Department: 260108 | HR Information Mgmt

You will receive another email when review of this form is complete.

NOTICE TO RECIPIENT: THIS E-MAIL, AND THE DOCUMENTS ACCOMPANYING THIS TRANSMISSION ARE CONFIDENTIAL AND MAY BE A COMMUNICATION PRIVILEGED OR PROTECTED BY LAW. IT IS MEANT FOR ONLY THE INTENDED REIPIENT. IF YOU RECEIVED THIS E-MAIL IN ERROR, ANY REVIEW, USE, DISSEMINATION, DISTRIBUTION, OR COPYING OF THE E-MAIL IS STRICTLY PROHIBITED - PLEASE DELETE THE MESSAGE FROM YOUR INBOX. THANK YOU IN ADVANCE FOR YOUR COOPERATION.

If the form submitted by an HR Rep is approved the employee and HR Rep will receive an approval email which will indicate that the document or documents have been added to the employee's record.

Submit a Document eForm for Erica Gustin (260108 | HR Information Mgmt) has been Approved

 no_reply@hr.unc.edu
To  Gustin, Erica Lynn

  Reply  Reply All  Forward  

Thu 9/15/2022 10:01 AM





This email is notification that the following Submit a Document eForm was approved and added to the employee's record.







Form ID: 2090959
Employee: Erica Gustin
Department: 260108 | HR Information Mgmt
Submitted By: Erica Gustin
Submission Date: 2022-09-14

NOTICE TO RECIPIENT: THIS E-MAIL, AND THE DOCUMENTS ACCOMPANYING THIS TRANSMISSION ARE CONFIDENTIAL AND MAY BE A COMMUNICATION PRIVILEGED OR PROTECTED BY LAW. IT IS MEANT FOR ONLY THE INTENDED REIPIENT. IF YOU RECEIVED THIS E-MAIL IN ERROR, ANY REVIEW, USE, DISSEMINATION, DISTRIBUTION, OR COPYING OF THE E-MAIL IS STRICTLY PROHIBITED - PLEASE DELETE THE MESSAGE FROM YOUR INBOX. THANK YOU IN ADVANCE FOR YOUR COOPERATION.


If the form submitted by an HR Rep is denied, the employee and HR Rep will receive a denial email which will include a denial reason and instructions if further action is required.

Submit a Document eForm for Erica Gustin (260108 | HR Information Mgmt) has been Denied

 no_reply@hr.unc.edu
To  Gustin, Erica Lynn

  Reply  Reply All  Forward  

Thu 9/15/2022 10:00 AM



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

This email is notification that the following Submit a Document eForm was denied.

Form ID: 2090959
Employee: Erica Gustin
Department: 260108 | HR Information Mgmt
Submitted By: Erica Gustin
Submission Date: 2022-09-14

Denial Reason: Missing Signature page, please add that page and resubmit a new form.

NOTICE TO RECIPIENT: THIS E-MAIL, AND THE DOCUMENTS ACCOMPANYING THIS TRANSMISSION ARE CONFIDENTIAL AND MAY BE A COMMUNICATION PRIVILEGED OR PROTECTED BY LAW. IT IS MEANT FOR ONLY THE INTENDED RECIPIENT. IF YOU RECEIVED THIS E-MAIL IN ERROR, ANY REVIEW, USE, DISSEMINATION, DISTRIBUTION, OR COPYING OF THE E-MAIL IS STRICTLY PROHIBITED - PLEASE DELETE THE MESSAGE FROM YOUR INBOX. THANK YOU IN ADVANCE FOR YOUR COOPERATION.

File Attachment Descriptions

Below is a list of the File Attachment Descriptions that users may choose from when uploading a leave document on the 'Submit a Leave Document' page in ConnectCarolina. If you need to upload a document type that is not listed below, please select 'Other' as attachment type.

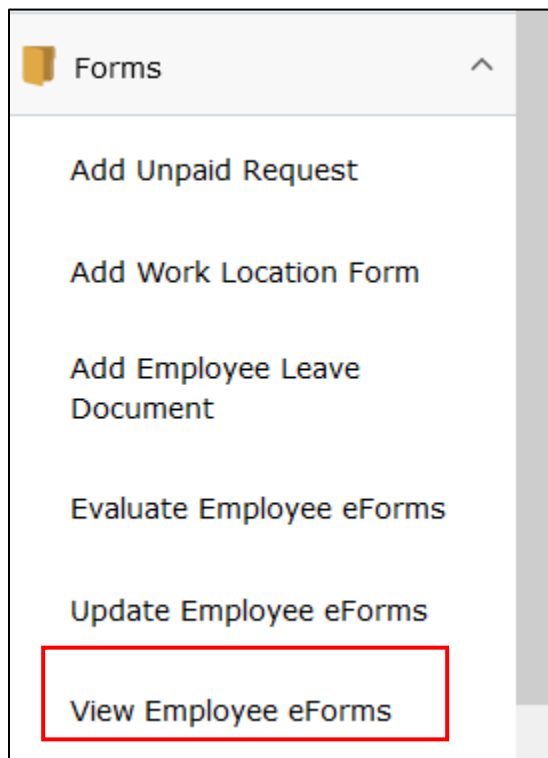
| File Attachment Description | Examples of Documentation |
|---|---|
| Adoption Forms | Adoption order or letter of placement |
| Birth Cert or Cert of Live Birth | Birth Certificate or Verification of Facts Birth document |
| Child Placement | Letter of placement |
| Custody Order | Custody Order |
| Death Certificate | Death Certificate |
| Disability Forms | Any form for DIP-NC benefits (i.e., Form 7A, 701, 703, etc.) |
| Donation Form | Voluntary Shared Leave (VSL) Donation Form |
| In Loco Parentis Cert | Attestation of In Loco Parentis Relationship |
| Medical Certification | Employee's Medical Certification, Form WH-380-E Family Member's Medical Certification, Form WH-380-F |
| Military Caregiver Leave Cert | Military Caregiver for a Current Servicemember, Form WH-385 ₁ Military Caregiver Leave for a Veteran, Form WH-385-V |
| Military Orders | For Active (or Inactive) Duty Training or Reserve Active Duty |
| Other | If no other description in the drop-down list is applicable, select "Other". |
| Qualifying Exigency Cert | Qualifying Exigency, Form WH-384 |
| Request Form | Family & Medical Leave Request Form Paid Parental Leave Request Form Voluntary Shared Leave (VSL) Request Form |
| Return to Work | Medical Leave Return to Work Form |

HR Rep Access to **View** a Leave Attachment

Select the HR WorkCenter Tile on the Admin Homepage of ConnectCarolina.



Select the 'View Employee eForms' link under the Forms folder.



A search page will populate, HR Reps can leave the criteria blank and select search to see all forms. If the HR Rep is looking for a specific form or employee, they can use the search criteria to find the form. To see only Leave document forms the HR Rep must search on the Form Type: DOCUMENT.



SEARCH : View an Employee eForms eForm

Search by:

Form ID

Form Type DOCUMENT

Form Status

Employee PID

Name

Department

Original Operator

Original Date

Company

Search by specific criteria or leave fields blank and select search button to see all forms the HR Rep has in their department security.

Personalize | Find | View All | First 1-11 of 11 Last

| Form ID | Form Type | Form Status | Employee PID | Name | Department | Original Operator | Original Date | Last Operator | Last Date | Company |
|---------|-----------|-------------|--------------|------|------------|-------------------|---------------|---------------|-----------|---------|
|---------|-----------|-------------|--------------|------|------------|-------------------|---------------|---------------|-----------|---------|

HR Reps will be able to view forms submitted by HR Reps in their department security. When the form opens all fields from the form will show but the attachment will not be viewable.

File Attachments 1 row

| Attachment Uploaded | Description | File Name | Delete |
|---------------------------------------|-------------|---------------|---------------------------------------|
| 1 <input checked="" type="checkbox"/> | Other | Doctor's Note | <input type="button" value="Delete"/> |

▶ **Comments**

Use the search button to return to the search page.

If you have questions or need assistance, please call the Benefits, Leave Administration, & Total Wellbeing department in the Office of Human Resources at 919-962-3071 or email leave@unc.edu.