Introduction to ConnectCarolina

Summary
Biographic and demographic information (bio/demo) is personal information about individuals maintained in the ConnectCarolina system. For every new student, staff, faculty member or interested prospect, a PID is assigned and a unique record is created.

When an individual’s bio/demo data changes, whether as a correction to existing data or a personal status change, the official record needs to be updated to reflect that change. Some bio/demo data, such as name, Social Security number and birth date, can only be changed by specific individuals within the Registrar’s Office or Human Resources. Other bio/demo data can be changed by staff, such as yourself, but a record needs to be maintained of how that data changes over time (for example, addresses). Effective dates capture that history. There is also bio/demo data that can be changed without capturing the history (for example, phone numbers).

In this workshop, you will learn about the various fields and icons associated with a person record, and how to locate an individual person record within ConnectCarolina, update bio/demo fields that are effective dated and update bio/demo fields that are not effective dated.

Performance Outcome
At the conclusion of this workshop, you will be able to:

- Locate an individual person record in ConnectCarolina
- Update bio/demo data that is effective dated
- Update bio/demo data that is not effective dated
- View the history of changes to a person’s bio/demo information
- Recognize when a service indicator is active on a person record
- Recognize when an individual has established privacy settings on his bio/demo information

Before you begin, you should have

- Completed FERPA online training
- Completed PeopleSoft orientation online training
INTRODUCTION TO CONNECTCAROLINA........................................................................................................ 1-1

GETTING STARTED ............................................................................................................................................ 2-1

ANATOMY OF A PERSON RECORD ................................................................................................................ 3-1
Addresses .............................................................................................................................................................. 3-2
Address Types ................................................................................................................................................... 3-3
Effective Dates and Address History ............................................................................................................... 3-4
Phone Numbers ................................................................................................................................................... 3-5
Phone Types ......................................................................................................................................................... 3-6
Email Addresses .................................................................................................................................................. 3-7
Email Address Types .......................................................................................................................................... 3-7

SCENARIO: LOCATE PERSON RECORD USING BASIC SEARCH ................................................................. 3-8

SCENARIO: UPDATE AN ADDRESS ..................................................................................................................... 3-9

SCENARIO: ADD A NEW ADDRESS TYPE ......................................................................................................... 3-12

SCENARIO: UPDATE PHONE NUMBER .............................................................................................................. 3-16

SCENARIO: UPDATE EMAIL ADDRESS ............................................................................................................. 3-17

WHAT IS A SERVICE INDICATOR? ................................................................................................................. 4-1
What are Privacy Settings? .................................................................................................................................. 4-1
Where to Find Service Indicators on an Individual Record ............................................................................... 4-1
Privacy Settings .................................................................................................................................................. 4-2
Service Indicators Used by Undergraduate Admissions ..................................................................................... 4-2
Introduction to ConnectCarolina

**What is ConnectCarolina?**
- A fully integrated administrative management system for:
  - Student services (admissions, financial aid, student records and student financials)
  - Human resources, payroll and finance
- The unique name for PeopleSoft and all of its component projects at Carolina

**Related Projects**
- PID Management:
- Portal
- Document Management
- Date Warehouse
- TouchNet (Payment Gateway)
- SPOTS
- Starlight

**SIS and ConnectCarolina**
- On July 20, ConnectCarolina will replace SIS as the authoritative source for all prospect, applicant and student bio-demo data
- Bio-Demo data will still be viewable in SIS although some screens will be turned off completely
- SIS will be updated with bio-demo changes every night so that you can still register students, process financial aid, etc.
## Go Live Dates for You!

<table>
<thead>
<tr>
<th>Department</th>
<th>Bio-Demo</th>
<th>Full Imp.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registrar's Office</td>
<td>July 20, 2009</td>
<td>Oct 2010</td>
</tr>
<tr>
<td>PID</td>
<td>July 20, 2009</td>
<td>N/A</td>
</tr>
<tr>
<td>Help Desk</td>
<td>July 20, 2009</td>
<td>Oct 2010</td>
</tr>
<tr>
<td>Intl Students Serv</td>
<td>July 20, 2009</td>
<td>Jan 2010</td>
</tr>
<tr>
<td>Summer School</td>
<td>July 20, 2009</td>
<td>Aug 2009</td>
</tr>
<tr>
<td>Student Accounts</td>
<td>July 20, 2009</td>
<td>June 2010</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>July 20, 2009</td>
<td>Feb 2010</td>
</tr>
</tbody>
</table>

## Security Access

- Like SIS, ConnectCarolina will balance the access needs of staff with the privacy needs of the campus community.
- Security access roles will give you access to what you need and nothing else.
- During training you will use a generic version of the account you will use back in your office.
- For account problems, you should contact.....

## What is the student lifecycle?

- The student lifecycle defines the role of the student at any given moment in time. The way you find the student in PeopleSoft is by knowing that role. Students may occupy more than one stage at any given time. For example:
  - A student may simultaneously be:
    - A current student in one program;
    - A prospect for a grad program and
    - An applicant to a second grad program.
Getting Started

ConnectCarolina is accessed through the MyUNC portal:

1. Go to my.unc.edu and log in using your Onyen and password.

2. On the right side, you will see a “My Applications” list. Click on ConnectCarolina link which will take you directly to the menu of ConnectCarolina (PeopleSoft).
When accessing bio/demo information begin by navigating to Campus Community on the ConnectCarolina menu. This will allow you access to various folders or components. It is important to note that your view of what you see on the Menu may be different from other users. This is because your settings are defined by your role at UNC which determines the folders and data available.
When you are working in certain pages in ConnectCarolina you will see navigation and action buttons located within or at the bottom of your page. These can include search list navigation buttons, page navigation buttons, and page action buttons; some buttons may be unavailable for selection. Below is a list of navigation buttons that you will typically see. When navigating in PeopleSoft, avoid using your web browser shortcut keys. Use the keys embedded in the system.

![Save Button](image)

Click to update the information that you have entered on the page to the database. The Save button updates the data for all pages in a component. When activated, the system briefly displays the saved message in the upper-right corner of the page.

![Return to Search Button](image)

Click to return to the search page. This button should be used rather than the Back button on your internet browser. Using the Back button may cause incorrect data to be displayed in PeopleSoft. Avoid using the Back button.

![Previous in List Button](image)

Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.

![Next in List Button](image)

Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.

![Notify Button](image)

The “Notify” button will NOT be used at UNC Chapel Hill. (Opens the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.)

![Lookup Button](image)

Select to open the Lookup page to choose information.

![Insert Row Button](image)

Inserts rows in a grid.

![Delete Row Button](image)

Deletes rows in a grid.

![Next Row Button](image)

Navigates to the next row of data.

![Previous Row Button](image)

Navigates to the previous row of data.

![Find Button](image)

Finds data in rows.

![View All Button](image)

Views all rows of data.
Anatomy of a Person Record

The General Info tab in the Student Services Center provides basic bio/demo information for a person. Some of this information can be edited while some is view only. If information is available for editing, a green edit button will display as shown below.

<table>
<thead>
<tr>
<th>Name Type</th>
<th>Display Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred</td>
<td>Patty Jones</td>
<td>Active as of 2009-04-28</td>
</tr>
<tr>
<td>Primary</td>
<td>Patricia Jones</td>
<td>Active as of 2009-04-24</td>
</tr>
</tbody>
</table>

When you need to edit a person’s information, clicking the green edit buttons will take you to the appropriate screens for editing that information.
Addresses

A person’s record can contain different types of addresses, such as home and mailing, and keeps a history of address changes. Each new address is effective dated, meaning that the address is not valid until that date or after. Additionally, an address can have an active or inactive status.

### Addresses

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Address</th>
<th>Effective Date</th>
<th>Status</th>
<th>Edit/View Address Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>1289 Carolina Avenue Raleigh, NC 27616 Wake</td>
<td>05/06/2009</td>
<td>Active</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Mailing</td>
<td>456 Manning Drive Chapel Hill, NC 27599 Orange</td>
<td>04/29/2009</td>
<td>Active</td>
<td>Edit/View Address Detail</td>
</tr>
</tbody>
</table>

### Add Address

**Effective Date:** 05/14/2009 | **Status:** Active

**Country:** USA

**Address:** Edit Address | Address Linkage

**Add Address Types**

- [ ] Home
- [ ] Mailing
- [ ] Campus
- [ ] Business
- [ ] Business 2
- [ ] Check
- [ ] Billing
- [ ] Deceased
- [ ] SEVIS Foreign Address

*Active address exists*
Address Types

Home
Permanent address/permanent residence.
For undergraduate students this typically indicates the address of the residence of their parents and/or guardians.
For graduates this is typically their current address.
This is where mail will be sent if no other mailing type is defined.

Mailing
Optional.
Typically local off-campus address.
Typically used for students living off campus, but not in their home/permanent residence.

Campus
On-campus residence address.

Business
UNC business address (student is also a UNC employee).

Business 2
UNC business address (student is also a UNC employee).

Check
This is where the employee’s paycheck is sent.

Billing
Billing address for students with unique billing situations.
This address is used for the 1098T.

Deceased
Deceased address.

SEVIS Foreign Address
SEVIS “Foreign” reporting address (formerly “Immigration”).
This address type is used only for an international student.
Corresponds to the address in the student’s “Foreign” address reported to SEVIS (for F and M Visas only).

SEVIS Immigration Rep. Address
SEVIS “U.S.” reporting address.
Effective Dates and Address History
When a person changes an address a new address is entered, but the history of address is preserved. As shown below, both rows of address refer to a person’s home address. The top row is the most recent address added to the system and becomes effective on 05/06/2009. The status of the address is set to active. If something were to be mailed to the home address, it would be sent to an active address with an effective date on or before the current date.

Address History

<table>
<thead>
<tr>
<th>Address History</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>Country</td>
<td>Status</td>
<td>Address</td>
</tr>
<tr>
<td>05/06/2009</td>
<td>USA</td>
<td>Active</td>
<td>1289 Carolina Avenue, Raleigh, NC 27601</td>
</tr>
<tr>
<td>05/05/2009</td>
<td>USA</td>
<td>Active</td>
<td>123 Main Street, Raleigh, NC 27616</td>
</tr>
</tbody>
</table>

Effective Date
A method of dating information You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don’t delete values; you enter a new value with a current effective date.

Status
Active or inactive.

Add button
Add a new row.

Delete button
Delete a row.

Update Addresses Link
Edit an address.
**Phone Numbers**

A person’s record can contain different types of phone numbers, such as home and cellular. Unlike addresses, phone numbers are not effective dated and a history is not maintained.

<table>
<thead>
<tr>
<th>Phone Type</th>
<th>Phone Number</th>
<th>Extension</th>
<th>Country Code</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cellular</td>
<td>919/335-6541</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home</td>
<td>919/265-9945</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>919/262-9985</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add button**

Add a new row.

**Delete button**

Delete a row.

**Preferred**

Preferred method of contact.
Phone Types

**Home**
Phone number at the permanent residence.

**Local**
Phone number at the local address.
Used for people who are not living at their permanent residence.
Corresponds to mailing address or campus address.

**Cellular**
Cellular phone number.

**Cellular 2**
Alternate cellular phone number.

**Business**
UNC work phone number.

**Business alt.**
Alternate UNC work phone number.

**Pager**
UNC pager number.

**Pager 2**
Alternate UNC pager number.

**Fax**
UNC fax number.

**Fax 2**
Alternate UNC fax number.

**Alert**
Alert number.
Used by university officials to get into contact with students in the case of a campus emergency.

**Deceased**
Deceased phone number.
Email Addresses
A person’s record can contain different types of email addresses, such as personal and business. Unlike addresses, email addresses are not effective dated and a history is not maintained.

Electronic Addresses

Patricia Jones
720020403

<table>
<thead>
<tr>
<th>Email Information</th>
<th></th>
<th></th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Email Type</td>
<td>*Email Address</td>
<td>Preferred</td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td><a href="mailto:pjones@unc.edu">pjones@unc.edu</a></td>
<td>□</td>
<td>-</td>
</tr>
<tr>
<td>Personal</td>
<td><a href="mailto:patriciajones@email.com">patriciajones@email.com</a></td>
<td>✓</td>
<td>-</td>
</tr>
</tbody>
</table>

Add button Add
Add a new row.

Delete button Delete a row.

Preferred Preferred method of contact.

Email Address Types

Personal Personal email address.
Business UNC email address.
Business 2 Non-UNC business address.
Scenario: Locate Person Record Using Basic Search

1. Campus Community → Student Services Ctr (Student).

2. Type the person’s PID into the ID field (not Campus ID) then click Search.

3. If there are multiple search results (if you don’t have a full PID or search by name), you must pick from the list (click anywhere on the record’s row). If there is only one match you will be taken directly to the person’s record.

4. Verify you have accessed the correct record or repeat the search process.
**Scenario: Update an Address**

1. After locating the correct person, click on the General Info tab.

![Patty Jones](image)

**Patty's Student Center**

2. Scroll down the page and locate the Addresses section. Click the Edit Addresses button to change an address.

![Addresses](image)

3. Click the Edit/View Address Detail link for Home Address.
4. Click the Add (+) button to add a row for the new address.

5. Click the Update Addresses link for the new row (the topmost row). If necessary, change the effective date and/or status of the address.

6. Replace the old address information with the new address then click OK.
7. Click OK two more times to return to the Student Services page and view the results.

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Address</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>1289 Carolina Avenue</td>
<td>Active as of 2009-05-06</td>
</tr>
<tr>
<td></td>
<td>Raleigh, NC 27616 Wake</td>
<td></td>
</tr>
<tr>
<td>Mailing</td>
<td>456 Manning Drive</td>
<td>Active as of 2009-04-29</td>
</tr>
<tr>
<td></td>
<td>Chapel Hill, NC 27599 Orange</td>
<td></td>
</tr>
</tbody>
</table>
Scenario: Add a New Address Type

1. If necessary, navigate to the Student Services Center and locate the appropriate person record.

2. After locating the correct person, click on the General Info tab.

3. Scroll down the page and locate the Addresses section. Click the Edit Addresses button to add a new address type.
4. Check the box beside the new address type then click Edit Address. The effective date will default to today's date, and it can be changed to a future date, if necessary.

5. Type the new address then click OK.
6. Verify the address is correct then click Submit.

7. When the address is successfully added, a green check mark will appear next to the new address type.
8. Click OK to view addresses on the General Info tab.

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Address</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing</td>
<td>585 Oak Avenue Apex, NC 27523 Wake</td>
<td>Active as of 2009-05-14</td>
</tr>
<tr>
<td>Home</td>
<td>1228 Carolina Avenue Raleigh, NC 27616 Wake</td>
<td>Active as of 2009-05-06</td>
</tr>
<tr>
<td>Mailing</td>
<td>456 Manning Drive Chapel Hill, NC 27599 Orange</td>
<td>Active as of 2009-04-29</td>
</tr>
</tbody>
</table>
Scenario: Update Phone Number

1. If necessary, navigate to the Student Services Center and locate the appropriate person record.

2. Locate the Phones information and click Edit Phones.

3. Replace the old phone number with the new phone number and click OK.

4. View the updated phone number.
Scenario: Update Email Address

1. If necessary, navigate to the Student Services Center and locate the appropriate person record.

2. Locate the Email Addresses information and click Edit Email Addresses.

3. Replace the old email address with the new email address then click OK.
4. View the updated email address.

<table>
<thead>
<tr>
<th>Email Type</th>
<th>Email Address</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td><a href="mailto:piones@unc.edu">piones@unc.edu</a></td>
<td></td>
</tr>
<tr>
<td>Personal</td>
<td><a href="mailto:patriciajones@email.com">patriciajones@email.com</a></td>
<td>✓</td>
</tr>
</tbody>
</table>
What is a Service Indicator?

Service indicators, represented by the 🚫 icon, are flags that can be assigned to individual student records. The FERPA Restricted Directory service indicator has a unique icon, 🔒, to help it stand out on the student record.

Service indicators provide information about the student to administrative offices and to the student. While they may be associated with service impacts as defined below, they may simply exist for information purposes only.

Service indicators can be active over multiple semesters, as with FERPA; they can be set to expire at a certain time or when certain circumstances occur; or they can be removed manually.

Service impacts allow or limit access to services and must be associated with a service indicator assigned to an individual student account. Service impacts are maintained by the office that is responsible for the service. For example, one a service impact would prevent a student from being able to register for classes. There may be multiple service impacts resulting from a service indicator, such as making the student ineligible for financial aid.

What are Privacy Settings?

The privacy settings icon, 🗝, indicates the individual (student, staff or faculty) has chosen to hide personal information, such as home address and/or phone number, in the directory. Privacy settings should NOT be confused with the FERPA Restricted Directory service indicator, which can only be set by the Office of the Registrar.

Where to Find Service Indicators on an Individual Record

Service indicators and privacy flags will always display in the Name row of the individual’s person record, as shown below.
Privacy Settings
If you click on the privacy settings icon on an individual’s record, you will be taken to a screen that shows you what fields the individual has chosen to keep private, as shown below.

Releasable FERPA Directory Information

Service Indicators Used by Undergraduate Admissions

<table>
<thead>
<tr>
<th>Service Indicator Code</th>
<th>Service Indicator Description</th>
<th>Service Impact</th>
<th>Graphic Icon</th>
<th>Who can assign?</th>
<th>Who can release?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATR</td>
<td>Missing Final Transcript</td>
<td>Block All Enrollment Activity Restrict Transcript Access</td>
<td>☑️</td>
<td>Admissions</td>
<td>Admissions or Registrar</td>
</tr>
<tr>
<td>AIM</td>
<td>Missing Immunization</td>
<td>Block All Enrollment Activity Restrict Transcript Access</td>
<td>☑️</td>
<td>Admissions</td>
<td>Admissions or Registrar</td>
</tr>
<tr>
<td>ACS</td>
<td>Community Standards Violation</td>
<td>No Technical Impact</td>
<td>☑️</td>
<td>Admissions</td>
<td>Admissions or Registrar</td>
</tr>
<tr>
<td>RFE</td>
<td>FERPA</td>
<td>No Technical Impact See online training module for more detail</td>
<td>☑️</td>
<td>Registrar</td>
<td>Registrar</td>
</tr>
<tr>
<td>N/A</td>
<td>Privacy Flag (not a service indicator)</td>
<td>None</td>
<td></td>
<td>Individuals</td>
<td>Individuals</td>
</tr>
</tbody>
</table>