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 document, 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.

Before you begin, you should have

- Completed FERPA online training
- Completed PeopleSoft orientation online training

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Getting Started

ConnectCarolina is accessed through the ConnectCarolina landing page.

The ConnectCarolina landing page (http://connectcarolina.unc.edu) provides login buttons to ConnectCarolina: Student Center (for students) and ConnectCarolina (faculty, staff and alumni). In addition, a collection of courtesy links to other non-PeopleSoft applications, mostly those used by students, are provided. This page also features important announcements, such as system upgrades or planned outages.:

1. Go to https://connectcarolina.unc.edu/
2. On the right side, click on the **Login to ConnectCarolina (Faculty, staff & alumni)** button.
3. Login with your Onyen username and password.

After logging in, users reach the portal which houses the ConnectCarolina suite of applications.

****Using the University's single sign-on, the portal recognizes users and their roles, and displays the appropriate parts of ConnectCarolina. For example, a logged in student sees only those parts of

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ConnectCarolina that a student should see. But a staff member who handles both student services and HR functions has access to both components (that is, after HR goes live).

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.

Important: 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.
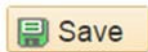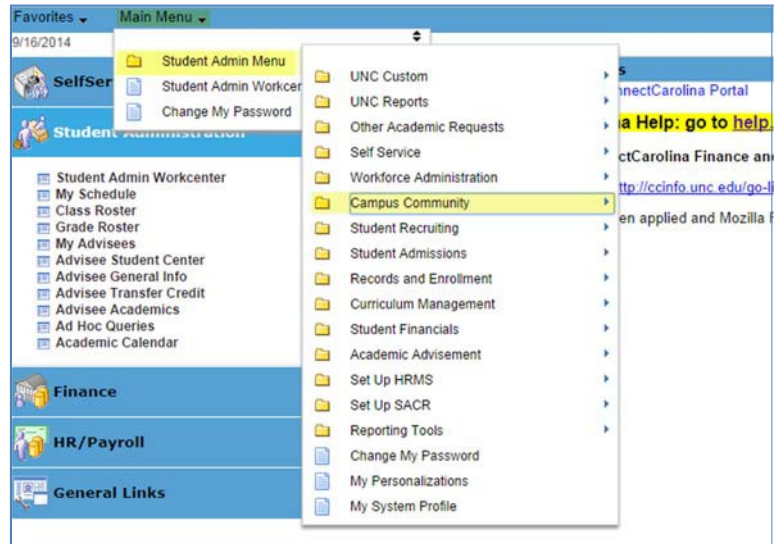
Save — Click to update the information that you have entered on the page to the database. The Save button updates the data for all pages in a component. When activated, the system briefly displays the saved message in the upper-right corner of the page.
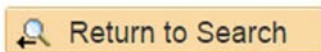
Return to Search — Click to return to the search page. This button should be used rather than the Back button on your internet browser. Using the Back button may cause incorrect data to be displayed in PeopleSoft. Avoid using the Back button.
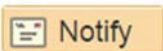
Notify — The "Notify" button will NOT be used at UNC Chapel Hill. (Opens the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.)

Select to open the Lookup page to choose information.

Inserts rows in a grid.

Deletes rows in a grid.

Navigates to the next row of data.

Navigates to the previous row of data.

Find Finds data in rows.

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View All 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.

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.

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Addresses

Current Addresses — Personalize | Find | View All | 📷 | 🎞️   First ◀ 1-2 of 3 ▶ Last

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home		07/23/2013	Active		07/23/2013 1:39:25PM	Edit/View Address Detail
Mailing		12/09/2012	Active		12/09/2012 8:04:47PM	Edit/View Address Detail

Add Address

Effective Date: 09/16/2014 📅   **Status:** Active ▾

Country: USA 🔍 United States

Address: Edit Address   Address Linkage

Submit   Reset

Add Address Types

- ☐ * Home
- ☐ * Mailing
- ☐ Campus
- ☐ Business
- ☐ Business 2
- ☐ Check
- ☐ Billing
- ☐ Deceased
- ☐ SEVIS Foreign Address
- ☐ SEVIS Immigration Rep. Addr.

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.

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.

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Phone Numbers

Phone Detail

*Phone Type	*Phone Number	Extension	Country Code	Preferred	
Alert ▼				☐	⊟
Cellular ▼				☑	⊟
Home ▼				☐	⊟

Add

OK   Cancel   Apply

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.

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Add button	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.

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

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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.

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.

Service Indicators Used by Undergraduate Admissions

Service Indicator Code	Service Indicator Description	Service Impact	Graphic Icon	Who can assign?	Who can release?
ATR	Missing Final Transcript	• Block All Enrollment Activity • Restrict Transcript Access	🚫	Admissions	Admissions or Registrar
AIM	Missing Immunization	• Block All Enrollment Activity • Restrict Transcript Access	🚫	Admissions	Admissions or Registrar

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ACS	Community Standards Violation	No Technical Impact		Admissions	Admissions or Registrar
RFE	FERPA	• No Technical Impact • See online training module for more detail		Registrar	Registrar
N/A	Privacy Flag (not a service indicator)	None		Individuals	Individuals