

## 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.

The screenshot shows the ConnectCarolina portal interface. At the top left is the 'Connect CAROLINA' logo. To the right, there is a 'Welcome!' message and a user name field. Below the logo are 'Favorites' and 'Main Menu' dropdowns. A vertical sidebar on the left contains several menu items: SelfService, Student Administration, Finance, HR/Payroll, Enterprise Reporting, General Links, Teaching Resources, and Research Resources. The main content area is titled 'Announcements' and features a 'DAILY STATUS' section with a clock icon. Below this, there are two green status indicators for 'ConnectCarolina' and 'InfoPorte', followed by the text 'Last Month Close - December'. The announcements section contains several items: 'Thursday, 1/31. Payroll Data Issue Resolved: The M07 payroll data lines are now available in the Payroll Account', '2018 W-2s are now available: When printing self-service W-2s, the recommended browsers are listed here: [http://connectcarolina.unc.edu/status-2/](#). However some users are experiencing issues when trying to print the self-service W-2 directly from Firefox. Please download to PDF first and then print or use one of the other browsers from the recommended link above.', 'Finance 9.2 Upgrade' with sub-points: 'Information about the Finance upgrade and current issues can be found on the [Finance Upgrade Info](#). The ConnectCarolina team is reviewing known performance issues across Finance. If you encounter a specific issue, please contact us so that we are aware and can work to resolve. Thank You.' and 'Agilent ePro Vendor Catalog: There is an issue with using Chrome and Firefox browsers for Agilent order placement orders. The vendor has confirmed this will be fixed in mid-February. Until then, continue to use Internet Explorer for orders.', and 'Undergraduate Faculty: The Academic Progress Reporting period is now open for Spring 2019. Students will receive feedback received on Thursday, February 28 – three business days before the drop deadline of March 5. The last day for undergraduate students is Friday, March 29, 2019. For more information, visit <http://studentsuccess.unc.edu/for-f>

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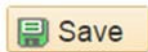
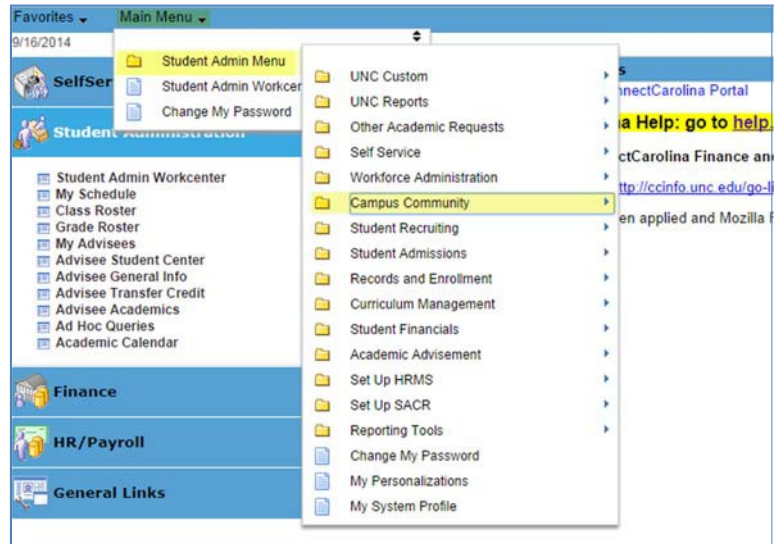
ConnectCarolina that a student should see. But a staff member who handles both student services and HR functions has access to both components (that is, after HR goes live).

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.

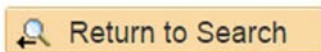
**Important:** Your view of what you see on the Menu may be different from other users. This is because your settings are defined by your role at UNC which determines the folders and data available.

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

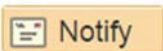
action buttons; some buttons may be unavailable for selection. Below is a list of navigation buttons that you will typically see. When navigating in PeopleSoft, avoid using your web browser shortcut keys. Use the keys embedded in the system.



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.



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.



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.



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.

▼ **Names**

Name Type	Display Name	Status
Preferred	Hannah Fleishman	Active as of 2009-09-10
Primary	Hannah Fleishman	Active as of 1923-01-01

[Go to top](#)

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▼ **Addresses** [edit addresses](#)

Address Type	Address	Status
Campus	214 Grimes UNC Residence Hall Chapel Hill, NC 27514	Inactive as of 2010-05-11
Home	311 SUMMERTIME RD FAYETTEVILLE, NC 28303	Active as of 2013-07-23
Mailing	311 Summertime Road Fayetteville, NC 28303	Active as of 2012-12-09

[Go to top](#)

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▼ **Phones** [edit phones](#)

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	[Redacted]	07/23/2013	Active		07/23/2013 1:39:25PM	<a href="#">Edit/View Address Detail</a>
Mailing	[Redacted]	12/09/2012	Active		12/09/2012 8:04:47PM	<a href="#">Edit/View Address Detail</a>

#### Add Address

Effective Date:  Status:

Country:  United States

Address: [Edit Address](#) [Address Linkage](#)

#### Add Address Types

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

## Address Types

<b>Home</b>	<p>Permanent address/permanent residence.</p> <p>For undergraduate students this typically indicates the address of the residence of their parents and/or guardians.</p> <p>For graduates this is typically their current address.</p> <p>This is where mail will be sent if no other mailing type is defined.</p> <p>Optional.</p>
<b>Mailing</b>	<p>Typically local off-campus address.</p> <p>Typically used for students living off campus, but not in their home/permanent residence.</p>
<b>Campus</b>	On-campus residence address.
<b>Business</b>	UNC business address (student is also a UNC employee).
<b>Business 2</b>	UNC business address (student is also a UNC employee).
<b>Check</b>	This is where the employee's paycheck is sent.
<b>Billing</b>	<p>Billing address for students with unique billing situations.</p> <p>This address is used for the 1098T.</p>
<b>Deceased</b>	Deceased address.
<b>SEVIS Foreign Address</b>	<p>SEVIS "Foreign" reporting address (formerly "Immigration").</p> <p>This address type is used only for an international student.</p> <p>Corresponds to the address in the student's "Foreign" address reported to SEVIS (for F and M Visas only).</p>

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SEVIS Immigration

SEVIS "U.S." reporting address.

Rep. 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	Country	Status	Address	
05/06/2009	USA	Active	1289 Carolina Avenue Raleigh, NC 27616 Wake	<a href="#">Update Addresses</a> <a href="#">Address Linkage</a>
05/05/2009	USA	Active	123 Main Street Raleigh, NC 27616 Wake	<a href="#">Update Addresses</a> <a href="#">Address Linkage</a>

**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				<input type="checkbox"/>	-
Cellular				<input checked="" type="checkbox"/>	-
Home				<input type="checkbox"/>	-

OK Cancel Apply Add

- 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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*Email Type	*Email Address	Preferred
Business	[Redacted]	<input checked="" type="checkbox"/>
Personal	[Redacted]	<input type="checkbox"/>



*Type	*URL Address

<b>Add button</b>	Add a new row.
<b>Delete button</b>	Delete a row.
<b>Preferred</b>	Preferred method of contact.

### Email Address Types

<b>Personal</b>	Personal email address.
<b>Business</b>	UNC email address.
<b>Business 2</b>	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.

**Releasable FERPA Directory Information**

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**Bio/Demo Data**

Date of Birth: 08/16/1991      Birth Location:  Employee  
 Gender: Female      Marital Status: Unknown  Contingent Worker  
 Person of Interest




Photo Releasable

Releasable Name    Releasable Address    Releasable Phone    ReleasableEmail

### 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	<ul style="list-style-type: none"> <li>Block All Enrollment Activity</li> <li>Restrict Transcript Access</li> </ul>		Admissions	Admissions or Registrar
AIM	Missing Immunization	<ul style="list-style-type: none"> <li>Block All Enrollment Activity</li> <li>Restrict Transcript Access</li> </ul>		Admissions	Admissions or Registrar

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<b>ACS</b>	Community Standards Violation	No Technical Impact		Admissions	Admissions or Registrar
<b>RFE</b>	FERPA	<ul style="list-style-type: none"><li>• No Technical Impact</li><li>• See online training module for more detail</li></ul>		Registrar	Registrar
<b>N/A</b>	Privacy Flag (not a service indicator)	None		Individuals	Individuals