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SOM TarHeel Reports

Overview and Basic Navigation

July 2023

By the end of this training session, you should be able to:

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- Identify what TarHeel reports are
- Explain how to access the reports
- Navigate through SOM Dashboard, Comprehensive Financial Summary Report, HR Funding, and Research Expenditures
- Apply filters to reports to specify data needed
- Export data for further analysis

What Should I Expect?

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- This training is intended for new users, beginners, and/or SOM employees needing a refresher.
- We will have an INTERACTIVE session, where you will have time to “play” with the reports.
- There will be questions that I am unable to answer, but I will help you find the answer!
- More in-depth training sessions are to come!

What are Tar Heel Reports?

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Summary level reporting tool for finance, research, and funding information

Best used for monthly/quarterly reporting

Also called Tableau

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Accessing TarHeel Reports

- Requesting Access
- Access through Infoporte
- Access through FBO website
- Access through ConnectCarolina
- Navigation and Filters

Requesting Access

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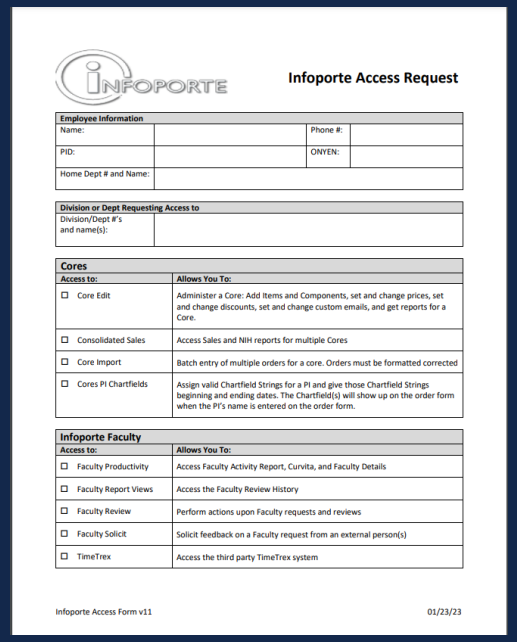
Page 3~ Infoporte Home>School Info



INFOPORTE

Infoporte Access Request

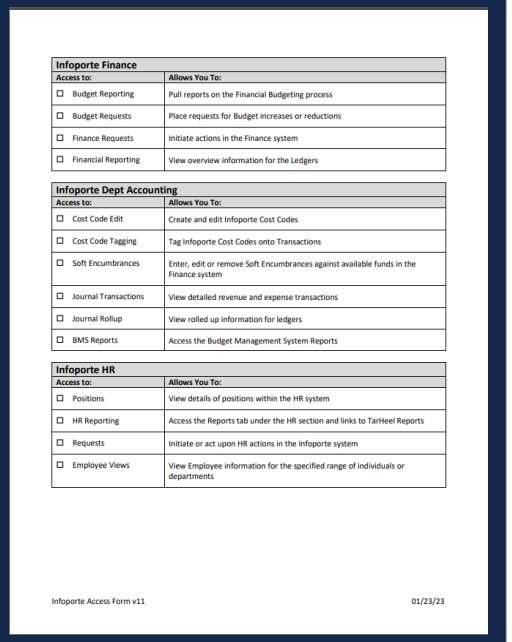
Employee Information			
Name:		Phone #:	
PID:		ONYEN:	
Home Dept # and Name:			

Division or Dept Requesting Access to	
Division/Dept #'s and name(s):	

Cores	
Access to:	**Allows You To:**
☐ Core Edit	Administer a Core: Add Items and Components, set and change prices, set and change discounts, set and change custom emails, and get reports for a Core.
☐ Consolidated Sales	Access Sales and NIH reports for multiple Cores
☐ Core Import	Batch entry of multiple orders for a core. Orders must be formatted corrected
☐ Cores PI Chartfields	Assign valid Chartfield Strings for a PI and give those Chartfield Strings beginning and ending dates. The Chartfield(s) will show up on the order form when the PI's name is entered on the order form.

Infoporte Faculty	
Access to:	**Allows You To:**
☐ Faculty Productivity	Access Faculty Activity Report, Curvita, and Faculty Details
☐ Faculty Report Views	Access the Faculty Review History
☐ Faculty Review	Perform actions upon Faculty requests and reviews
☐ Faculty Solicit	Solicit feedback on a Faculty request from an external person(s)
☐ TimeTrex	Access the third party TimeTrex system

Infoporte Access Form v11 01/23/23



Infoporte Finance	
Access to:	**Allows You To:**
☐ Budget Reporting	Pull reports on the Financial Budgeting process
☐ Budget Requests	Place requests for Budget increases or reductions
☐ Finance Requests	Initiate actions in the Finance system
☐ Financial Reporting	View overview information for the Ledgers

Infoporte Dept Accounting	
Access to:	**Allows You To:**
☐ Cost Code Edit	Create and edit Infoporte Cost Codes
☐ Cost Code Tagging	Tag Infoporte Cost Codes onto Transactions
☐ Soft Encumbrances	Enter, edit or remove Soft Encumbrances against available funds in the Finance system
☐ Journal Transactions	View detailed revenue and expense transactions
☐ Journal Rollup	View rolled up information for ledgers
☐ BMS Reports	Access the Budget Management System Reports

Infoporte HR	
Access to:	**Allows You To:**
☐ Positions	View details of positions within the HR system
☐ HR Reporting	Access the Reports tab under the HR section and links to TarHeel Reports
☐ Requests	Initiate or act upon HR actions in the Infoporte system
☐ Employee Views	View Employee information for the specified range of individuals or departments

Infoporte Access Form v11 01/23/23

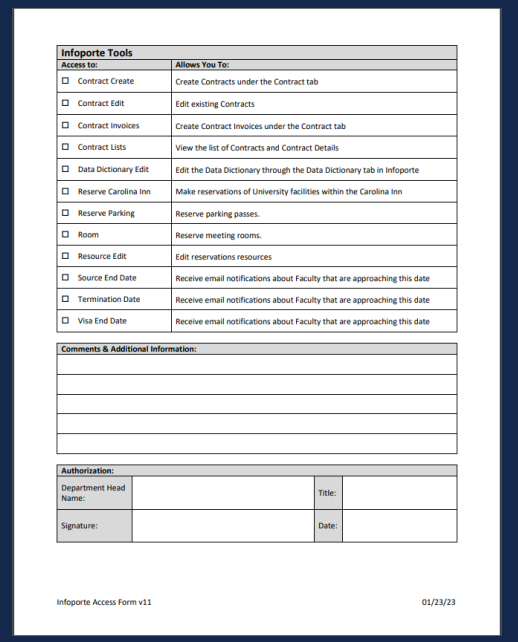
Infoporte Home	
Access to:	**Allows You To:**
☐ School Info	Access reports developed by individual schools or divisions.

Infoporte Inbox	
Access to:	**Allows You To:**
☐ Calendar Edit	Create and edit calendar entries
☐ Calendar View	View Calendar entries
☐ Request Lock	Employ the Lock capability on requests. Locking prevents further editing of a request. Unless unlocked, it may only be approved or disapproved
☐ Request Views	View requests in other inboxes

Infoporte Settings	
Access to:	**Allows You To:**
☐ Content Edit	Edit the content that displays under the School Info tab
☐ Group Edit	Create and edit groups used within workflow routes
☐ Route Edit	Create and edit workflow routes
☐ User Core Edit	Create and edit a Core
☐ User Edit	Perform Access Request Coordinator (ARC) tasks within Infoporte

Infoporte Student	
Access to:	**Allows You To:**
☐ Student Views	View the Term Enrollment, Degree Candidate and Degree Recipient reports
☐ TarHeel Reports	Access the Reports tab under the Student section and a link to TarHeel Reports

Infoporte Access Form v11 01/23/23



Infoporte Tools	
Access to:	**Allows You To:**
☐ Contract Create	Create Contracts under the Contract tab
☐ Contract Edit	Edit existing Contracts
☐ Contract Invoices	Create Contract Invoices under the Contract tab
☐ Contract Lists	View the list of Contracts and Contract Details
☐ Data Dictionary Edit	Edit the Data Dictionary through the Data Dictionary tab in Infoporte
☐ Reserve Carolina Inn	Make reservations of University facilities within the Carolina Inn
☐ Reserve Parking	Reserve parking passes.
☐ Room	Reserve meeting rooms.
☐ Resource Edit	Edit reservations resources
☐ Source End Date	Receive email notifications about Faculty that are approaching this date
☐ Termination Date	Receive email notifications about Faculty that are approaching this date
☐ Visa End Date	Receive email notifications about Faculty that are approaching this date

Comments & Additional Information:

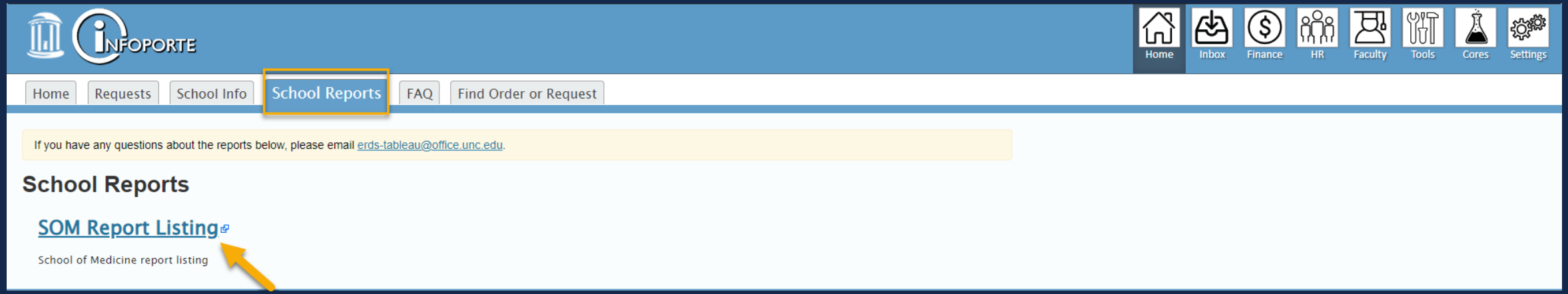
Authorization:			
Department Head Name:		Title:	
Signature:		Date:	

Infoporte Access Form v11 01/23/23

To gain access to SOM Tar Heel Reports an Infoporte Access Request Form must be submitted to the SOM ARC, Jasamine Davis

Infoporte

Once your access is granted, you will have a “School Reports” tab on your Home Page
Select the School Reports tab>SOM Report Listing



FBO Website

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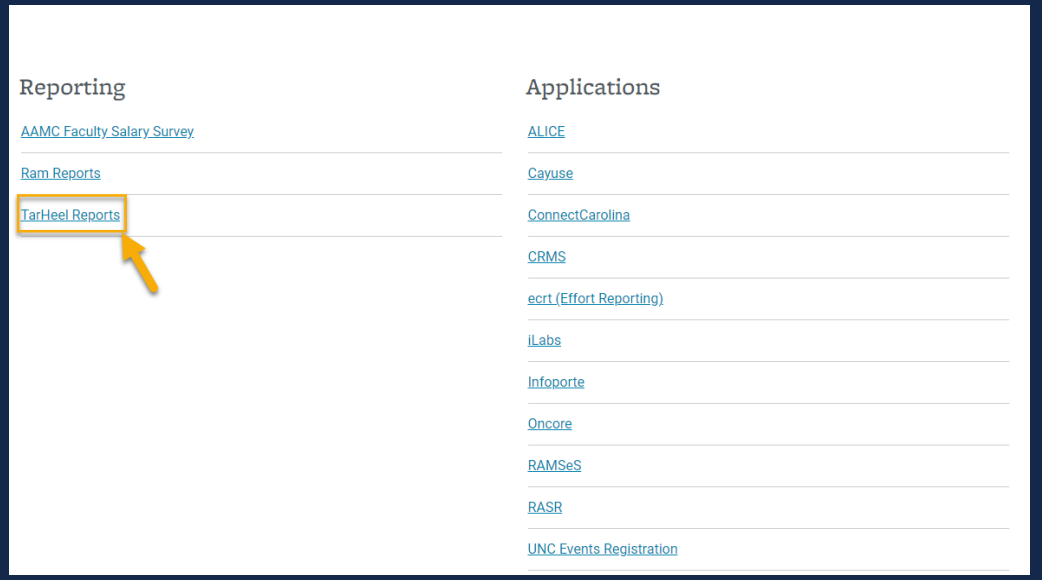
You can also access Tar Heel Reports from the FBO website:

- Scroll to the bottom of the page
- Reporting>TarHeelReports
- You will be asked to sign into Tableu



FBO Website

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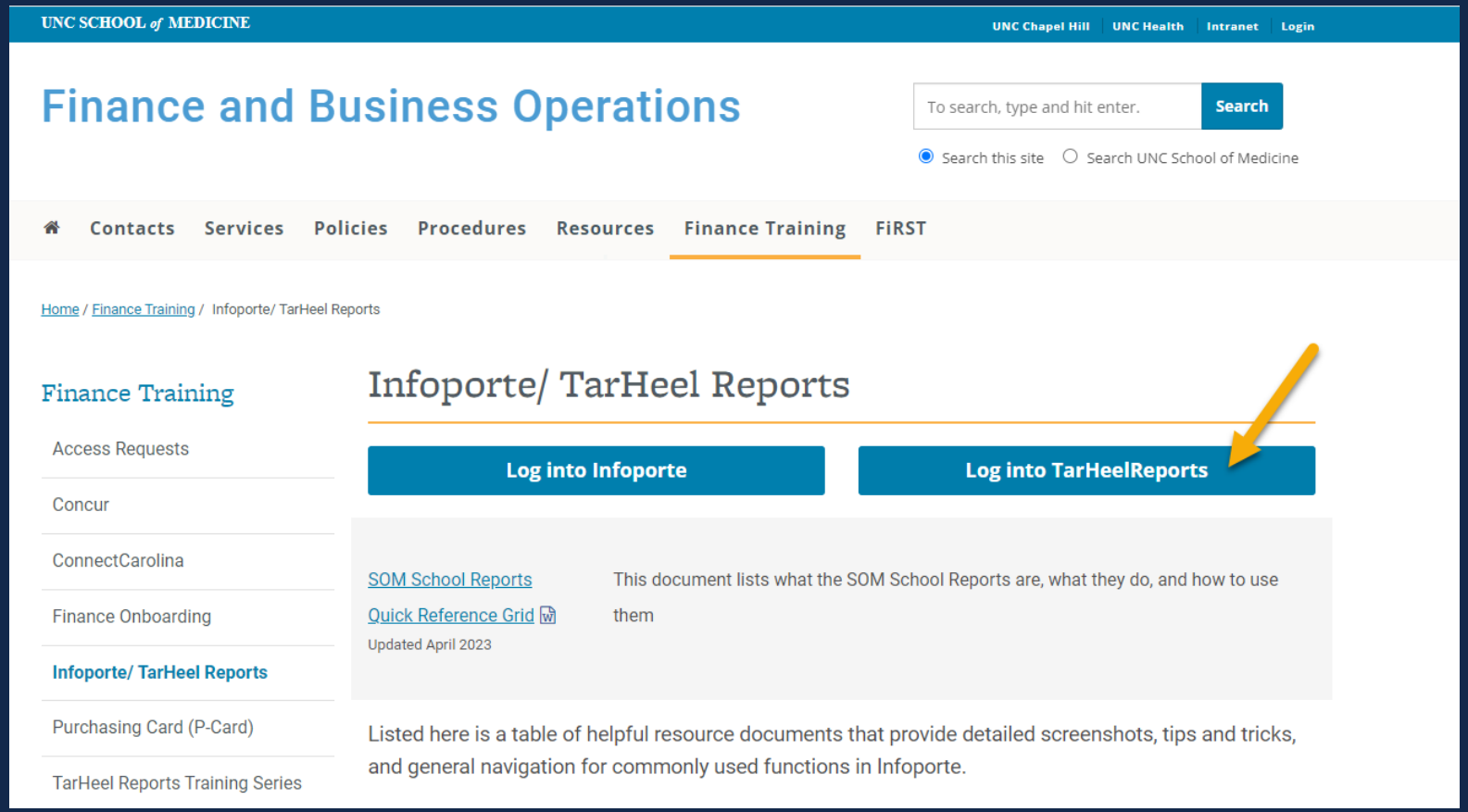
You can also access Tar Heel Reports from the FBO website:

- Click Finance Training
- Infoporte/TarHeel Reports
- Log into TarHeel Reports button at the top of the page



Connect Carolina

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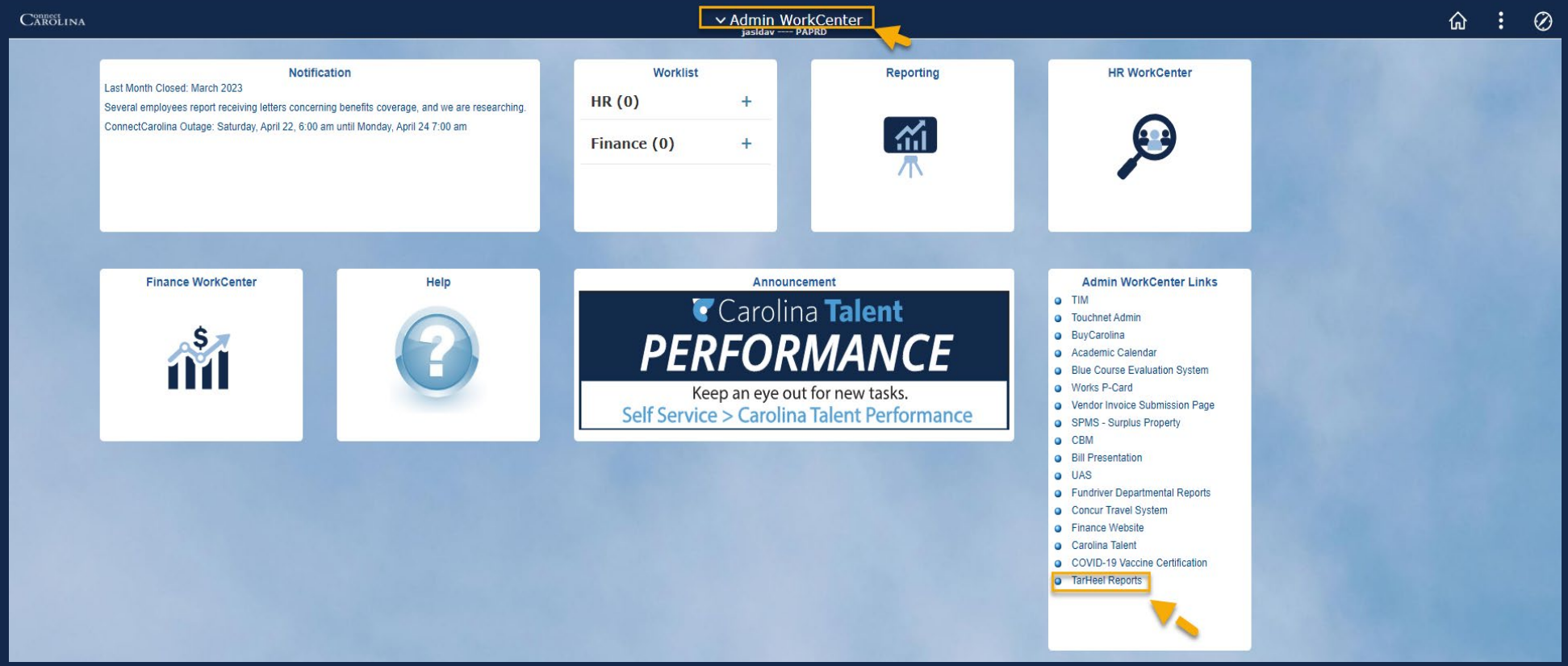

Access Connect Carolina>Admin Work Center> Admin Work Center Links>TarHeel Reports

Connect Carolina

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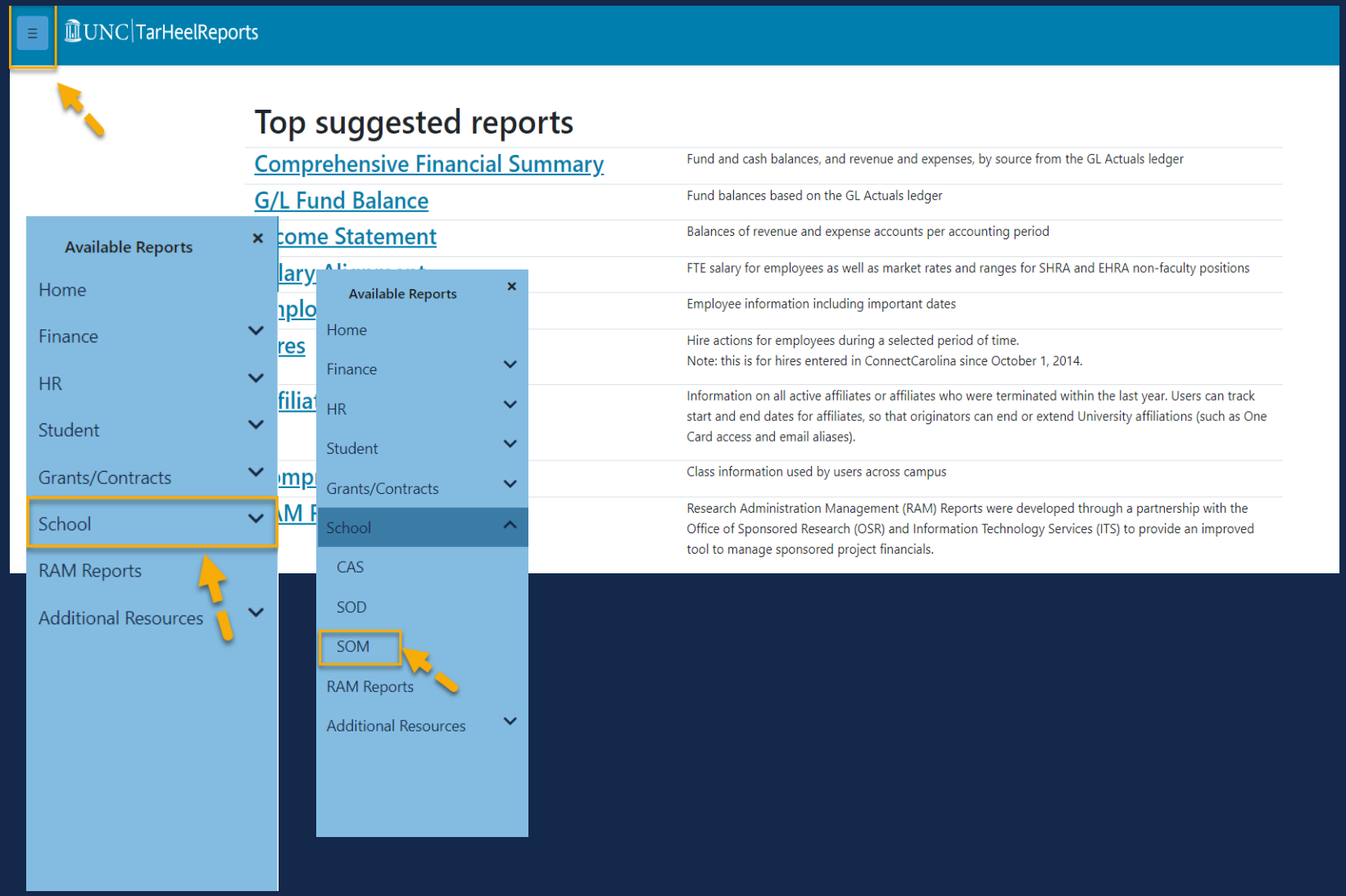
From CC it will open to the University TarHeel Reports and you will need to drill down to SOM
Select the three lines in the top left corner>School>SOM



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SOM Reports

- Landing Page
- Navigation
- Tabs
- Filters

SOM Dashboard

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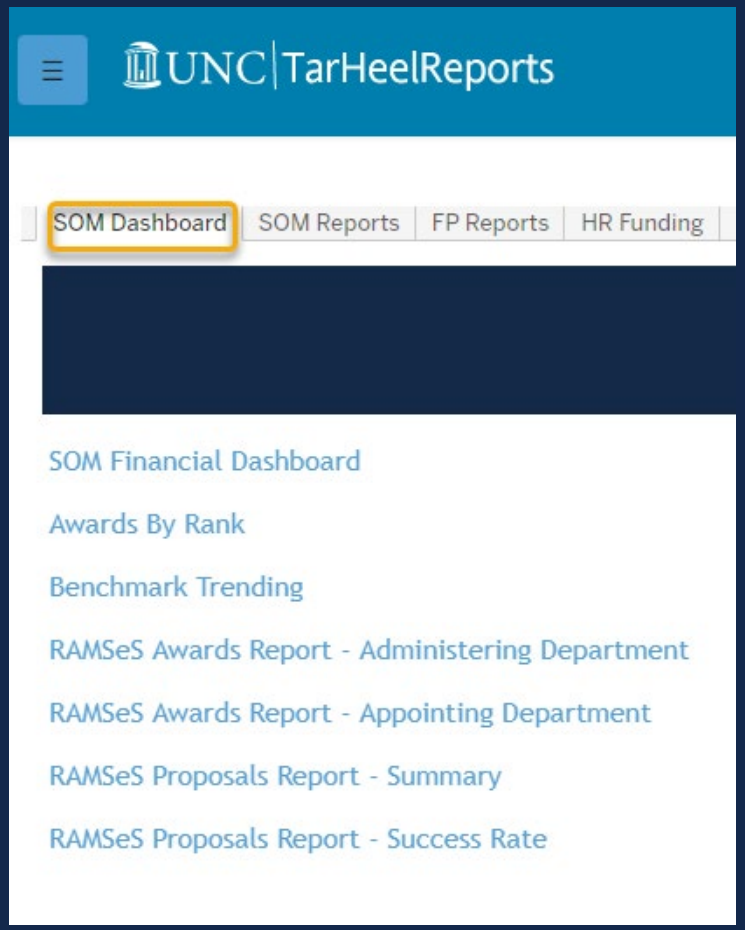

SOM Dashboard		
SOM Financial Dashboard **Data Source:** *GL Actuals ledgers* **Updated:** *every quarter*	• Shows a very high level all funds financial view using charts and graphs • Contains data for the last four Fiscal Years, as well as the current FY • "Notes for Dashboard" tab contains descriptions of what each tab within this report consists of	• Prepare for annual reviews (internal or external), as the data for the annual reviews held by the Dean's Offices comes from these reports.
Awards by Rank **Data Source:** *RAMSeS & Peoplesoft (for rank)* **Updated:** *quarterly*	• Shows a count of awards by rank and can be limited by FY, department, and/or division	• Review RAMSeS awards reports by Rank for either administering or appointing department.
Benchmark Trending **Data Source:** *AAMC, CPSC, Epic, and payroll* **Updated:** *annually*	• Shows AAMC (compensation) and CPSC (productivity) benchmark trends year-over-year • Shows actual productivity and total comp data as a percent of benchmarks	• Used to help inform decisions and to watch market trends
RAMSeS Award Report – Administering Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary awards data for Administering Department(s) by fiscal year, sponsor group, and sponsor type. • Also includes an awards growth chart, showing data by Sponsor group and Administering Department	• Review RAMSeS awards reports by administering department
RAMSeS Award Report – Appointing Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary awards data for Appointing Department(s) by fiscal year, sponsor group, and sponsor type. • Also includes an awards growth chart, showing data by Sponsor Group and Appointing Department	• Review RAMSeS awards reports by appointing department
RAMSeS Proposals Report – Summary **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows proposal data for the last 10 years by Sponsor Group and FY. • Can be limited by Administering Department, PI, Status, and Proposal Type	• Review a summary of all RAMSeS proposal for the last 10 years
RAMSeS Proposals Report – Success Rate **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows the funded status for proposal over the prior 10 years. • Can be limited by Administering Department, PI, Proposal Type, Sponsor Type, and Award Type	• Review the funded status of all RAMSeS proposals for the last 10 years

SOM Reports

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Report	Description	What does it help me do?
SOM Reports		
SOM Actuals/Ledger Report – Comprehensive Financial Summary **Data Source:** *GL Actuals ledger* **Updated:** *every day*	Department Rev Exp Summary View BEST TAB TO USE! • Organized by source, and shows the revenue and expense totals • Lists source owning department and the departments who have spent on a particular source Cash and Investments, Balance Sheet Accounts • Shows the cash and balance sheet accounts for the given sources	• Track your monthly fund balance for trust funds (auxiliary, recharge, gifts, contract trust, etc.) where you are the owning department **Notes:** • Filters have been pre-selected to view trust fund types, as this is the best use for this report. • Not as helpful for State, F&A, and C&G ledger groups as they don't have beginning and ending fund balances.
Line Description for Deposits **Data Source:** *KK ledger* **Updated:** *every day*	• Provides line descriptions for SOM deposits (journal ID's beginning with "ARD")	• Locate the journal ID in order to do a correcting journal entry • See individual deposits for a given source, project ID, department, etc.
Line Descriptions for Vouchers/PO's/Requisitions **Data Source:** *KK ledger* **Updated:** *every day*	• Provides line descriptions for posted SOM requisitions and purchase orders • Shows associated voucher #, req #, PO #, and vendor detail where available • Tabs are broken out by PO type	• Another location to view transaction detail (similar to the transactions tab). • Similar to MMD statement
Recharge/Cores Report **Data Source:** *GL Actuals ledger* **Updated:** *every day*	Recharge Actuals Report Rev/Exp • View of actuals that is pre-set to view core transactions • Shows beginning balance, revenues, expenses, and ending balance • Broken out by accounting period	• Ability to view core transactions only without having to sift through other transactions
State Funds Report **Data Source:** *Peoplesoft (GL, HR)* **Updated:** *every day*	• State funds and payroll projections, source 13001 • Summary view available by department or personnel/nonpersonnel • Only expense accounts are shown, 515xxx accounts are excluded • Salary projections include salary + terminal leave + core data + transit and excludes all other fringe.	• Ability to identify by department remaining state funds to be spent within the FY.

FP Reports

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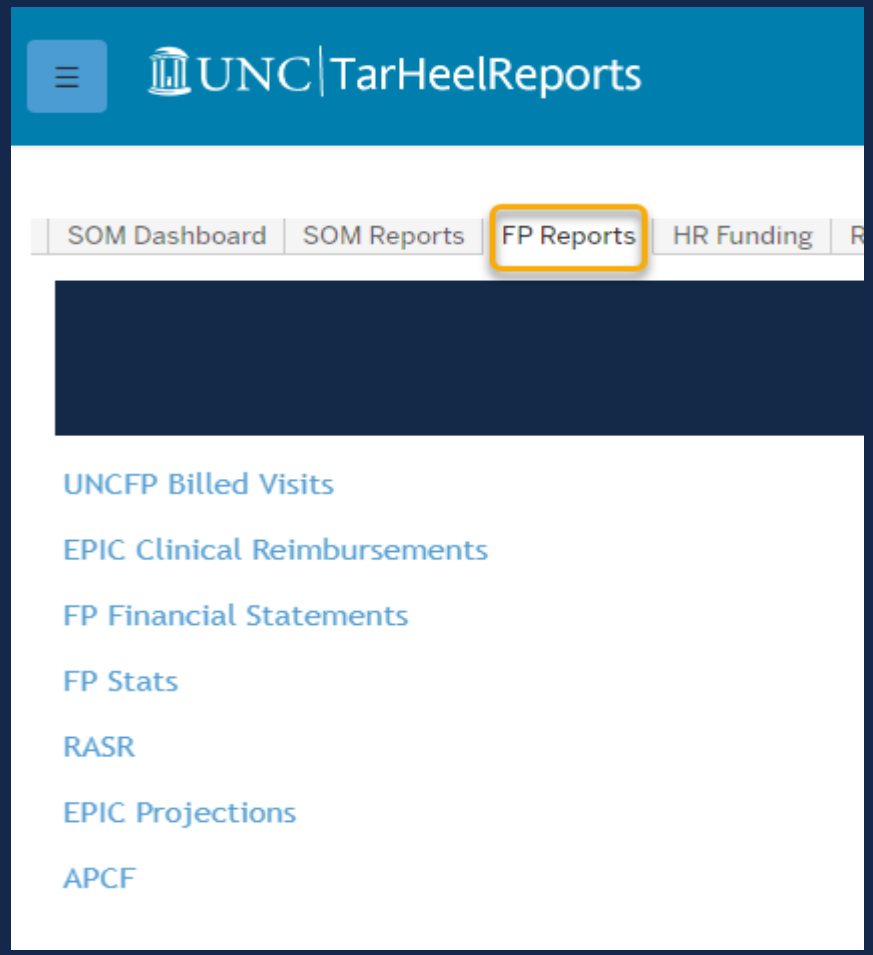

FP Reports		
UNCFP Billed Visits **Data Source:** *EPIC* **Updated:** *once a month*	• Summarizes billed visits by billing provider and provider seen • EPIC billed visit data is a unique combination of identifiers that indicate a billable provider's singular encounter with a patient. This report joins the EPIC billed visit data to the SOM summary department.	• It provides visibility to inpatient and outpatient billed visit, as well as, the payor information.
EPIC Clinical Reimbursements **Data Source:** *EPIC* **Updated:** *once a month*	• Summarizes FP clinical revenue monthly or quarterly by department and provider details • Can be limited by fiscal year, subdivision, bill area, inpatient/outpatient, or provider	• Shows charges, net receipts, and wRVU detail by month or quarter
FP Financial Statements **Data Source:** *PeopleSoft (GL Actuals/Accrual Ledgers)* **Updated:** *once a month*	• Shows income statements by fiscal year of operating and nonoperating budget vs actuals • Also includes monthly trends of budget • Includes balance sheet of assets, liabilities, and retained earnings. Showing beginning balance, current year activity and YTD	• Allows you to review your department's financials, and YTD/MTD budget vs actuals
FP Stats **Data Source:** *PeopleSoft (GL Actuals/Accrual Ledgers)* **Updated:** *once a month*	• Compares the statistics of a department by fiscal year • Includes: cash balance, expense per day, days of cash, AR balance, DAR, adjusted operating income, net income %, ne income, operating %, operating income, NCR, net patient revenue per wRVU, volumes, and salary benefit %	• This report allows you to review your departmental statistics year over year
RASR **Data Source:** *RASR* **Updated:** *live*	• FP Clinical Contracts & Invoices • Detailed data, can be filtered by department	• This report allows you to review departmental data

HR Funding

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HR Funding		
SOM Funding Report **Data Source:** *payroll* **Updated:** *every weekday morning by 10 am*	SOM Payroll – Summary • Shows the salary distribution by major fund type (by percentage and amount). Can be viewed by person, employee type, or department. SOM Payroll • Shows wage, fringe, and tax expense amounts by accounting period SOM Payroll – WAGES ONLY • Show wages only expense amounts by accounting period	• See the funding history of an individual, project, source or department. • Prepare personnel for a progress report **To Note:** • All short-term retro actions were loaded in October 2014, so you would not get an accurate funding history prior to October 2015. November 2015 – present is accurate.
Faculty Productivity - Current **Data Source:** *HR, Payroll, Revenue Cycle, MGMA, AAMC, FPSC, and ASAHP* **Updated:** *once a month*	• Shows Current FY Faculty Productivity data, and uses Program Code to calculate cFTE • Several tabs contain graphs in order to benchmark faculty salaries and wRVUs against AAMC, MGMA, and FPSC data	• This report excludes prior year-PAATs, so that the view is for wages received in the current year
Faculty Productivity - Historical **Data Source:** *HR, Payroll, Revenue Cycle, MGMA, AAMC, FPSC, and ASAHP* **Updated:** *once a month*	• Shows Historical Faculty Productivity data, and uses Program Code to calculate cFTE • Several tabs contain graphs in order to benchmark faculty salaries and wRVUs against AAMC, MGMA, and FPSC data	• This report excludes prior year-PAATs, so that the view is for wages received in the current year
SOM Program Code on Faculty Funding Report **Data Source:** *payroll* **Updated:** *every weekday morning by 10 am*	SOM Payroll Program Code Checking • Shows payroll data by program code grouping (Admin, Clinical, Research, Education, funding lines note coded, etc.) • Also includes the detail for export with the full chartfield string information SOM Payroll Program Code by Dept • This tab shows the same information as the first tab, but does it at a departmental level vs. by person	• See how employees have been program coded. It's also an easy way to see who does not have a program code on their funding line and for which pay period, so that a PAAT can be processed • See the Program Code handout for additional detail regarding running this report

Research

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Research		
RAMSeS Award Report – Administering Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary awards data for Administering Department(s) by fiscal year, sponsor group, and sponsor type. • Also includes an awards growth chart, showing data by Sponsor group and Administering Department	• Review RAMSeS awards reports by administering department
RAMSeS Award Report – Appointing Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary awards data for Appointing Department(s) by fiscal year, sponsor group, and sponsor type. • Also includes an awards growth chart, showing data by Sponsor Group and Appointing Department	• Review RAMSeS awards reports by appointing department
Awards by Agency – Administering Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary of awards data for Administering Department(s) by fiscal year, PI, First Level Agency, Second Level Agency, and Sponsor. • Also includes a separate tab/report for NIH, NSF, DOD, NIEHS, NCI, and Industry Awards.	• Review RAMSeS awards reports by administering department based on a specific agency and/or sponsor
Awards by Agency – Appointing Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary of awards data for Administering Department(s) by fiscal year, PI, First Level Agency, Second Level Agency, and Sponsor. • Also includes a separate tab/report for NIH, NSF, DOD, NIEHS, NCI, and Industry Awards.	• Review RAMSeS awards reports by appointing department based on a specific agency and/or sponsor
DHHS Awards by Activity Code – Administering Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary of DHHS awards by activity code data for Administering Department(s) by fiscal year, PI, and PI PID. • Also includes a notes tab that defines each activity code, as well as detail tab to easily download the data.	• Review RAMSeS DHHS awards by activity code for administering departments
DHHS Awards by Activity Code – Appointing Department **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows summary of DHHS awards by activity code data for Appointing Department(s) by fiscal year, PI, and PI PID. • Also includes a notes tab that defines each activity code, as well as detail tab to easily download the data.	• Review RAMSeS DHHS awards by activity code for appointing departments
RAMSeS Proposals Report – Summary **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows proposal data for the last 10 years by Sponsor Group and FY. • Can be limited by Administering Department, PI, Status, and Proposal Type	• Review a summary of all RAMSeS proposal for the last 10 years
RAMSeS Proposals Report – Success Rate **Data Source:** *RAMSeS* **Updated:** *daily*	• Shows the funded status for proposal over the prior 10 years. • Can be limited by Administering Department, PI, Proposal Type, Sponsor Type, and Award Type	• Review the funded status of all RAMSeS proposals for the last 10 years

Research Expenditures

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Research Expenditures		
SOM Project Balances Report **Data Source:** *Infoporte Projects Summary Table* **Updated:** *daily*	• Shows current project data by PI • Can be limited by SOM Department, Project Status, Year of Project End Date, Positive/Negative Balance, and Clinical Trials (Yes/No)	• Shows current project data by PI. Can be limited by SOM Department, Project Status, Year of Project End Date, Positive/Negative Balance, and Clinical Trial (Yes/No)
Direct-Indirect Cost Report **Data Source:** *GL Actuals ledgers* **Updated:** *daily*	• Shows direct costs for SOM and estimates indirect cost amounts for SOM projects • Can be filtered by project, department, or PI	• For planning purposes, this report provides clinical trial tax, animal tax, and F&A allocation estimates
SOM Cash Advance Report for Project IDs **Data Source:** *O ledger* **Updated:** *daily*	• Shows the SOM balance for the cash advance account (559510) and/or the travel advance account (559511) by project id. • Summarized by FY and funding department	• Shows SOM balance for the Cash Advance account (559510) and/or the Travel Advance account (559511) by project id. Report summarized by Fiscal Year and funding department.
Research Expenditures **Data Source:** *GL Actuals ledgers* **Updated:** *daily*	• Contract & grant expenditures by project type for both administering and appointing departments. • Includes both direct and indirect cost	• Review contract and grant expenditure trends year over year

Budget

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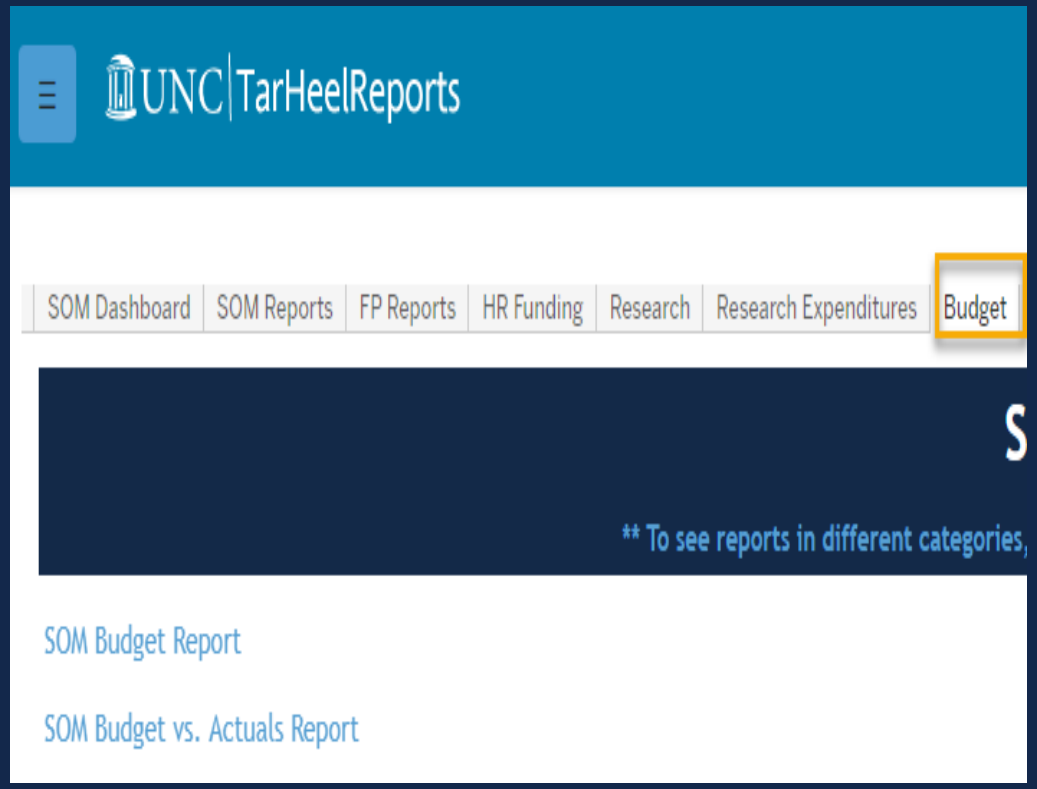

Budget		
SOM Budget Report **Data Source:** *GL Actuals ledgers* **Updated:** *once a year during the SOM budget process*	• Shows the first 6 months of actuals in the current FY, as well as the actuals for the last four FY's • Each fund type is broken out on a separate tab (except for Clinical funds, as this is a separate process in Strata) • The "Summary – All Fund Types" tab shows the detail and is used to export the data to populate the history within the actual budget excel template	• Utilized during the SOM budget process so that departments have 6 months of actuals in order to help with projections for the upcoming FY budget
SOM Budget vs Actuals Report **Data Source:** *KK and GL Actuals ledgers* **Updated:** *every quarter*	• Shows actuals for the previous four FY's, budget submitted and actuals for the current FY, and variance current FY budget vs actuals • Available in fund type view and expense type views • "2xxx Budget Submitted" tab shows the view of budget as submitted by department	• To track how a department is doing compared to budget

Funds Flow

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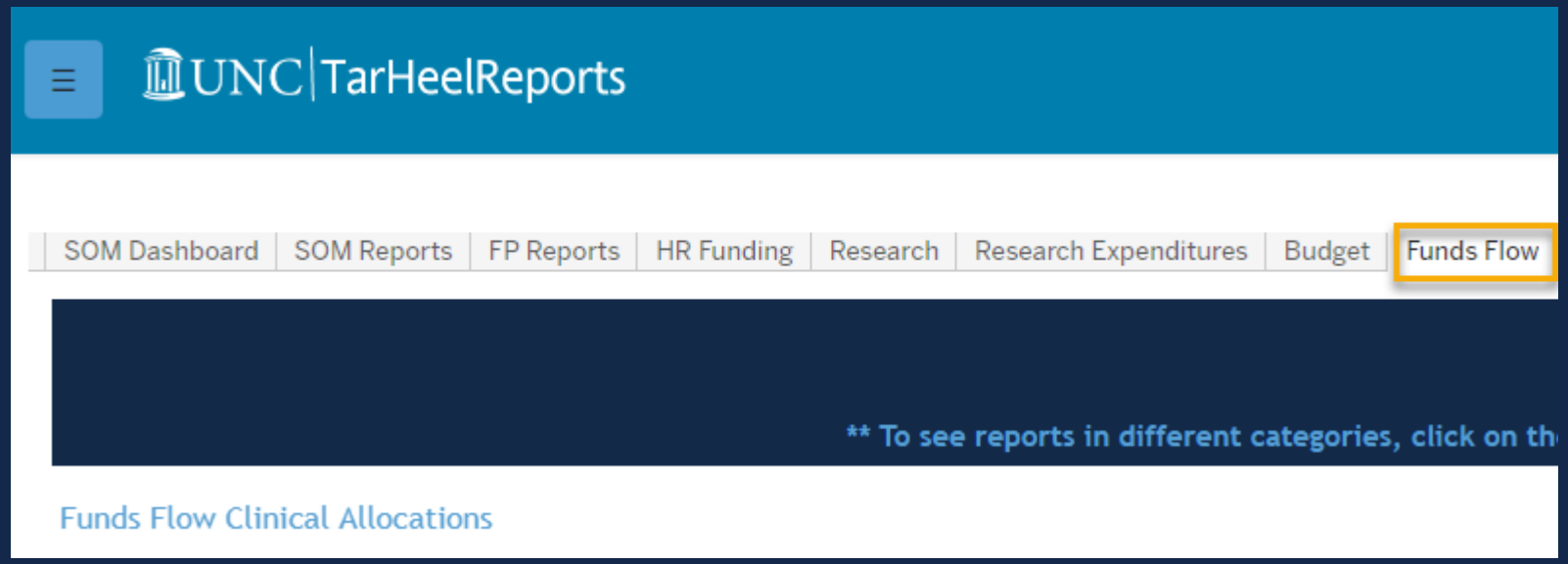

Funds Flow		
Funds Flow Clinical Allocations **Data Source:** *GL Actuals, and in-house file maintained by the Funds Flow Team* **Updated:** *every month*	• Shows the detailed breakdown by accounting period for all funds flow clinical allocations, beginning in FY19 • Provides overall summary by department along with any allocations that are reimbursed at the provider level (productivity, overhead, benefits, Non MD Detail) • MGMA benchmarks available for compensation and productivity	• To see the detailed data behind the funds flow clinical allocations and track any variances in productivity, overhead, benefits, and clinic expenses

Let’s Get into the System!

If you haven’t already, log into TarHeel Reports.

Scenario 1~SOM Dashboard

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- What is the Gifts, Endowment Inc and Other revenue amount for 4274 - TEACCH for FY2020?

$555,501

NOTE:
We will share our answers using the “Rapid Fire” method. Once you find your answer, type it in the chat but **DO NOT** hit enter. Once everyone has had a chance to look for the answer. I will say “GO” and you will hit enter so that all answers populate at the same time!

Scenario 2~Comprehensive Financial Summary

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- What was the total revenue for Pharmacology 4240xx for July 2022 including all fund groups?
- Using the same information above what was the end funding balance for source 51896?

-$239,774.04

$78,683.68

Don’t forget “Rapid Fire” method!

Scenario 3~HR Funding

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- Using the payroll summary tab, what amount of Raymond Pickle's (700164495) salary was paid by research funding in FY 2022?
- Using the information above, how much was funded by department 426401?

$88,197.05 $79,421.88

Don't forget "Rapid Fire" method!

Scenario 4~Research Expenditures

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- Paul Dayton (PI Appt Dept 424601) is working on a project for department 412802 in FY 2023. What is the project description and type?
- Using the project name above what was the direct cost for the administering department 412804?

High Frame Rate
3-D Super Reso

$0.00

Don’t forget “Rapid Fire” method!

Next Training Session:

August 15th(virtual) 16th(in-person) HSL Library 307

School of Medicine Reports (SOM) Tab

Subject Matter Expert: Kristen Beattie, SOM Budget Analyst

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