Policy Change Log - January 2021

Major Edits

Major edits include anything that alters the purpose or effect of the document.

Title	Link
Policy on Export Controls	https://unc.policystat.com/policy/9025813/latest/

UNC's export policy has not been revised in 13 years. During those 13 years there have been significant changes to the export regulations. In addition, UNC leadership has recognized that export compliance is an institution wide initiative and the program should be located in a central office that serves the entire University. The changes and new requirements in this policy are all directly required to adequately comply with the US Government's export control laws, regulations, and policies.

• This policy changes the issuing officer and responsible office from the Office of Sponsored Research to Institutional Integrity and Risk Management (IIRM). Export Control Compliance is an institution wide compliance program and is not limited to research.
• This policy was updated to include the authority for the Vice Chancellor of IIRM to designate an "Empowered Official." This designation is a regulatory requirement to conduct certain transactions.
• This policy requires that individuals and organizations must work with the export control officer to reasonably address outstanding export control compliance risks.

Title	Link
Finance Policy 205 - Policy on ConnectCarolina Chartfield Source Establishment	https://unc.policystat.com/policy/9017127/latest/
Finance Procedure 205.2 - Procedure on Establishing an Endowment Fund Source	https://unc.policystat.com/policy/9022560/latest/
Finance Procedure 205.3 - Procedure on Establishing, Modifying and Closing an Institutional Trust or Special Fund Source	https://unc.policystat.com/policy/9017154/latest/
Finance Form 205.3.1f - Source Modification Checklist	https://unc.policystat.com/policy/8600250/latest/
Finance Form 205.3.2f - Source Deactivation Checklist	https://unc.policystat.com/policy/9022636/latest/

In Oct. 2014, new Source Create module in ConnectCarolina replaced the legacy Online UNC Account Request System. The Source Create module has been used for chartfield Source establishment since then. Essentially, the same business protocols are being upheld – the way they are entered into the system has changed. This revision reflects the following changes of business processes and terminology:

• Chartfield "Source" in ConnectCarolina replaces legacy "Account" concept.
• The Source Create module in ConnectCarolina replaces legacy Online UNC Account Request System.
• Establishment of new Sources and modification of existing Sources must be processed through the Source Create module.
• Trust fund Sources are required to be reviewed by campus departments, at minimum, annually.
• Forms are updated, including Source modification and deactivation checklist.

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Title	Link
University Policy Framework	https://unc.policystat.com/policy/9127993/latest/
Standard on Policies	https://unc.policystat.com/policy/9128007/latest/
Procedure for Policy Management	https://unc.policystat.com/policy/9128011/latest/
Request to Decommission a Policy	https://unc.policystat.com/policy/9128027/latest/

The substantive change of note is the shortening of the PRC review window from two weeks to one week. The PRC discussed this change at its meetings in late 2020 and agreed that most review take place prior to the PRC meeting and that the second week of review was generally under-used. With these changes, policies presented at PRC will become active on the Friday following the meeting, unless the unit specifies another effective date.

All documents: minor technical updates for clarity, readability, grammar, and to reflect current names of campus units and individuals.

Standard on Policies: In addition to the shortened review period, also removed outdated language requiring decommissioned policies to be replaced with placeholders or references to new policies (does not apply in all situations).

Policy on Classified Research	Retired

The content of the policy is no longer relevant: UNC does not have the necessary physical infrastructure, administrative support, or proper government approvals to conduct classified research.