

## Process for PD7 approvals via electronic submission (EHRA Non-Faculty)

Initiator prepares a PD7 to be routed electronically, by going to the following link to access the most recent version of the PD7 form: <https://provost.uncc.edu/academic-budget-personnel/forms>

Complete all required sections of the PD7, based on the desired personnel action being processed. Save the Excel file as: PD7\_800XXXXXX\_Last Name, First Name.

A. The Initiator should compose an email to the Business Officer attaching the completed PD7 as an Excel file. **Please do not scan or forward the PD7 as a PDF file, as changes cannot be made in this format.**

1. **The subject line of the email should state: PD7 Personnel Payroll Action for Electronic Approval for First Name and Last Name**
2. Include in the text of the email the purpose of the PD7 action (e.g. full-time and part-time faculty salary changes, funding changes, start date/end date changes, FTE changes, postdoctoral fellow new hires, etc.)
3. Send email to Business Officer.

B. The Business Officer receives the email and PD7 saved as an Excel file attachment.

1. The Business Officer should review that the PD7 is complete and accurate. If so, skip bullet 2 below.
2. Should any changes need to be made, the Business Officer needs to make them at this time and re-save the Excel file.
3. The Business Officer should forward the email to the Dean/Vice Chancellor/or Approving Authority attaching the completed PD7 as an Excel file. **Please do not scan or forward the PD7 as a PDF file, as changes cannot be made in this format.**

C. The Dean/Vice Chancellor/or Approving Authority should review the PD7 for approval.

1. If after reviewing the PD7 and the decision is not to approve, please let the Business Officer know via email that the action is not approved.
2. If after reviewing the PD7 and the decision is to approve, please compose an email to the EPA Recruitment email address [eparecruitment@uncc.edu](mailto:eparecruitment@uncc.edu) attaching the completed PD7 as an Excel file. **Please do not scan or forward the PD7 as a PDF file, as changes cannot be made in this format.**
3. The subject line of the email should state: Approved - PD7 Personnel Payroll Action for Electronic Approval for First Name and Last Name
4. The body of the email should include the Dean/Vice Chancellor/or Approving Authority's approval via the below template language.
  - a. **By way of this email, I approve the personnel action submitted on the attached PD7 Form for First Name and Last Name.**
5. Forward the email to the EPA Recruitment email address [eparecruitment@uncc.edu](mailto:eparecruitment@uncc.edu)
  - a. attaching the PD7 as an Excel file.

D. HR team members in EHRA Non-Faculty Administration will manage the [eparecruitment@uncc.edu](mailto:eparecruitment@uncc.edu) email address and will review these emails as they are submitted.

1. The HR team members in EHRA NF should review that the PD7 is complete and accurate. If so, skip bullet 2 below.

2. Should any changes need to be made, the HR team members in EHRA Non-Faculty Administration need to make them at this time and re-save the file.
3. The EHRA Non-Faculty team member will forward the email chain to Alice Patterson in the Budget Office along with the PD7 in pdf format.
  - a. The subject line of the email should state: Approved - PD7 Personnel Payroll Action for Electronic Approval for First Name and Last Name.
  - b. The email will include the following text: **By way of this email, I approve the personnel action submitted on the attached PD7 Form for First Name and Last Name.**

E. The Budget Office receives the PD7 pdf and accompanying email from EHRA Non-Faculty Administration. (Email Subject line: "PD7 Personnel Payroll Action for Electronic Approval for First Name and Last Name")

1. The Budget Office reviews the PD7 for accuracy relating to the fund, account code, position number, Banner ID, appropriate approval signatures. (Note: a grant fund must include an approval signature by Contracts & Grants; if needed, the PD7 is emailed to Grants, [grants-contracts@uncc.edu](mailto:grants-contracts@uncc.edu), to sign and return to Budget.)
2. The Budget Office edits the PD7 to sign and date. If any changes are made to the PD7, a note is added to the bottom of the form explaining the change. The PD7 is saved in a department folder.
3. The PD7 is emailed to Payroll – [payroll@uncc.edu](mailto:payroll@uncc.edu)

F. The Payroll Department receives the PD7 and accompanying email from the Budget Office.

1. The Payroll Department reviews the PD7.
2. The Payroll Department makes any calculations needed to send with the PD7 to HR
3. The Payroll Department edits the PD7 to sign and date. If any changes are made to the PD7, a note is added to the bottom of the form explaining the change.

**\*It is very important to be mindful of payroll processing cut-off dates. Payroll cannot make special accommodations for documents received late.\***

G. HRIS Coordinator receives the PD7 and accompanying email from Payroll.

1. HRIS enters job information into Banner NBAJOBS
2. HRIS Coordinator edits the PD7 to sign and date.
3. HRIS Coordinator emails the PD7 back to Payroll to indicate the job has been added/updated in Banner.

**If you normally send an informational copy of a PD7 to Benefits via campus mail, please email it to [Benefits@uncc.edu](mailto:Benefits@uncc.edu).**