

UNC CHARLOTTE ACADEMIC PERSONNEL ACTION

Date Submitted 3/16/2015
 Superseding Previous PD-7 Dated _____
 Superseding Previous EPAF Transaction # _____

(1) Legal Last Name Willard Legal First Name Keith Middle B.
 UNC Charlotte ID 800123456 Department Special Education 9 Mos 12 Mos
 Last 4 SSN (New Emp) _____ Primary Employment Status: Full Time Part Time
 Other - Explain: _____

(2) APPOINTMENT REAPPOINTMENT CHANGE
 Rank or Title Assistant Professor Position# 4444
 Contract Dates: From 8/17/2015 To 5/15/2019
 Effective Payroll Dates: 8/16/2015 Remove from Payroll 6/30/2019
 Annual Salary Amount

\$55,000.00

 If split funded, enter %

100.00%

 Index/Fund #

101460

 Account Code

913100

 Stipend Amount _____
 Total Annual Salary

\$55,000.00

 Comments _____

(3) PART-TIME OR EPA TEMPORARY OR POST-DOC APPOINTMENT REAPPOINTMENT
 Salary Amount

 Index/Fund #

 Account Code

 Rank or Position _____ Position # _____
 Contract Dates: From _____ To _____
 Effective Payroll Dates: _____ Remove from Payroll _____
 Comments _____

(4) SPECIAL PAYMENT (USED FOR FULL-TIME EMPLOYEES ONLY) Position # _____
 Dates of Service: From _____ To _____
 Payment Dates(s) _____
Note: If payment date is not indicated payment will be received on next pay period.
 Amount

 Index/Fund #

 Account Code

 Explanation _____

(5) LEAVE OF ABSENCE EXTENSION OF LEAVE RETURN FROM LEAVE EFFECTIVE
 Leave without Pay Leave with Partial Pay Leave with Full Pay
 Beginning Date _____ End Date _____ Salary (if applicable) _____
 Extended Contract Dates: From: _____ To: _____
 Explanation _____ Position # _____

(6) NOTICE OF SEPARATION
 Position # _____ Rank or Title _____
 Date Separated _____ Remove from Payroll _____
 Adjusted Salary (for Section #3 only) _____
 Reason: Resigned Term Expired Deceased Terminated Retired
 Other - Explain _____ TSERS

Requested by: _____ Date _____ Approved by: _____ Date _____
 Title: Prov./Vice Chan. Academic Affairs

Academic Affairs / Human Resources	Budget	Payroll	Grants & Contracts Admin.
Date _____	Date _____	Date _____	Date _____
By _____	By _____	By _____	By _____

Completing the PD-7 Form

Producing a PD-7:

The PD-7 Form is a payroll document that should be used for Faculty appointments and changes in payroll status.

The original PD-7 should be printed on **yellow** paper by the originating department/unit. As this original is routed, each office that normally retains a copy can determine if they need to make a copy for their files of the signed original.

Routing the PD-7:

Obtain 2 original signatures. A PD-7 is signed by the Dean, as 'Requestor' and the Vice Chancellor (Provost), as 'Approver'. After the Dean's signature is obtained, the PD-7 is sent to the Office of Academic Affairs. The Office of Academic Affairs maintains files on all Faculty and will retain one copy for the files. The PD-7 is then routed to Position Control. If grant funded, the PD-7 will be forwarded to Grants and Contracts Administration prior to submission to Position Control. Next, the form is routed to Payroll and then to Human Resources/Benefits for Banner HR input. The original is returned to Payroll for filing.

Instructions for Completing the PD-7: See top of Form---

Superseding Previous PD-7 Dated -- If the PD-7 supersedes a prior PD-7, indicate the date of the prior PD-7. Include a description of the change that is being requested (i.e. change fund, change dollar amount) and if available, include a copy of the original PD-7. All superseding PD-7s should be printed on **pink** (original) paper.

Date Submitted -- the date the PD-7 is typed.

SECTION (1)

Section (1) contains basic required information to be completed each time a PD-7 is generated.

Last Name, First Name, Middle – Legal name as shown on SSN card or passport.

UNC Charlotte ID No. OR last 4 digits of SS#. You **cannot** list the entire Social Security number subsequent to a state law passed on 1/1/06.

Department -- The name of the Home Department of the employee.

9 Mos./12 Mos. – Indicate if the employee is a 9- or 12-month appointment. This information is very important for full-time Faculty.

Status: Indicate whether an employee's primary employment status at the University is full-time or part-time.

Other -- Explain -- Used to explain an appointment term if the term does not fall into the other appointment categories. i.e. 11-month employee or SPA full time receiving EPA Special Pay.

SECTION (2)

Section (2) is completed for full-time appointments, reappointments, and changes.

Appointment Box – Check if a PD-7 is being completed for the first time on a new full-time employee.

Reappointment Box – Check if a current full-time employee is being reappointed.

Change Box – Check if the status of a current full-time employee is being changed, i.e., rank or title, salary, position #, contract dates, name, etc. When using the *Change* category, only the new information should be indicated in Section (2). Section (1) should also be completed.

Rank or Title – Indicate the rank or title of the employee.

Position # - Indicate the employee's position number.

Contract Dates – The actual dates of an employee's appointment agreement. For example, if a faculty member's term of appointment indicates a beginning date of August 15, 20XX and an ending date of May 15, 20XX, these dates would be typed in on the Contract Dates *From* and *To* lines.

Effective Payroll Dates – These dates are used by Payroll. For a 9-month Faculty member appointed for the academic year, the dates will always be *August 16 to June 30*. For a 12-month Faculty member, use the actual starting date and ending dates.

Remove from Payroll – To be used for time-limited appointments and contracts. Use the date of the last payroll for this employee.

Annual Salary Amount – Indicate the annual salary the employee is to be paid, excluding any stipends. Remember all salaries should be annualized, even if the employee is working less than a full year. The contract dates will determine the amount the employee actually receives of this annual amount.

Index/Fund # - Indicate the Banner fund number and account code where the salary will be charged. There is a drop-down box for the Account Code.

Stipend Amount – Indicate the stipend amount (if applicable).

Index/Fund # - Indicate the Banner fund number and account code where the stipend will be charged. There is a drop-down box for the Account Code.

Total Annual Salary – This is an automatic calculation.

SECTION (3)

Section (3) is completed for part-time/temporary faculty and staff appointments and reappointments only. Post-Docs are also included here.

Please note: EPA & SPA full-time staff with an additional part-time appointment (such as teaching in the evenings) are paid as a Special Payment and should not be listed in this section. A person cannot be both a full-time employee and a part-time/temporary employee at the same time.

Appointment Box – Check for new part-time/temporary faculty and EPA staff appointments.

Reappointment Box – Check for reappointment of above. Caution: EPA staff can only be appointed for up to 12 months. After that they should be hired permanently or terminated.

Index/Fund # - Indicate the fund number and account code where the salary will be charged. There is a drop down box for the account code. Please note that funds starting with 101, 102 or 103 are the **only** funds that can have the code of 913200, and that these funds and account code are strictly used for part-time teaching.

Salary – Indicate the salary the employee is to be paid over the period of the contract.

Rank or Position – Indicate the rank or position of the employee.

Position # - POST40 for Post Docs, ETMP50 for Part-Time EPA Staff, and EPTF50 for Part-Time Faculty.

Contract Date(s): - *From, To* The actual dates of the employee's employment term.

Effective Payroll Dates: - This is used by payroll for monthly pay dates. For academic year appointments, use *September 1 to May 31* for part-time faculty and for Fall Semester only, use *September 1 to December 31*. For Spring Semester only, use *January 1 to May 31*.

Remove from Payroll – Date of last payroll for employee.

If a part-time Employee terminates before the end of their contract, please do new PD-7 and fill in Section 6.

SECTION (4)

Section (4) is to be used for Special Payments only. This section should be used only if a user does not have EPAF access, a faculty member is on leave, or when superseding a previous Special Payment action. This is mainly used for our 9-month faculty receiving extra incidental compensation. Occasionally, with justification and approvals (see Policy 101.15) 12-Month Faculty and full-time EPA and SPA Staff can receive a special payment if it is outside of their job duties and outside of their normal work schedule. For example, you would use this section if a staff member taught a class at night.

Dates of Service: *From To*--List the actual dates the work is performed.

Payment Date(s) – Indicate the date(s) the employee is to be paid. If payment should be spread over a period of time, indicate payroll beginning and ending dates for payments. No employee can be prepaid for these extra assignments.

Account # - Indicate the account number where the special payment will be charged. Please note that funds starting with 101, 102 or 103 are the only funds that can have the code of 913300, and that these funds and account code are strictly used for a teaching special payment.

Amount – The amount of the special payment.

Explanation – Briefly describe the purpose of the special payment and attach justification if this is a 12-month employee.

SECTION (5)

Completed by the Office of Academic Affairs.

SECTION (6)

Academic Affairs will complete this section for the following:

Full-time employees within the Division (upon receiving *Letter of Resignation* with termination date, or notice of retirement, or notice of death of employee).

Department/unit should complete the following:

Separation of Part-Time Faculty or EPA Temporary or Post Doc. Be sure to include *Adjusted Salary* when a part-time faculty member separates before the end of his/her appointment. *Adjusted Salary* should be the amount of money the department/unit deems appropriate for the amount of work performed for the partial semester.