

Appoint, Change and Terminate (ACT) Documentation Creating a Budget ACT Document

The **Budget Document Reason** is **ONLY** used when processing salary increases during the annual Budget period. This document type was created to “speed up” the approval process during the Budget period by creating fewer approvers. However, this depends on how the Workflow Officer has set up the approval list for this document type.

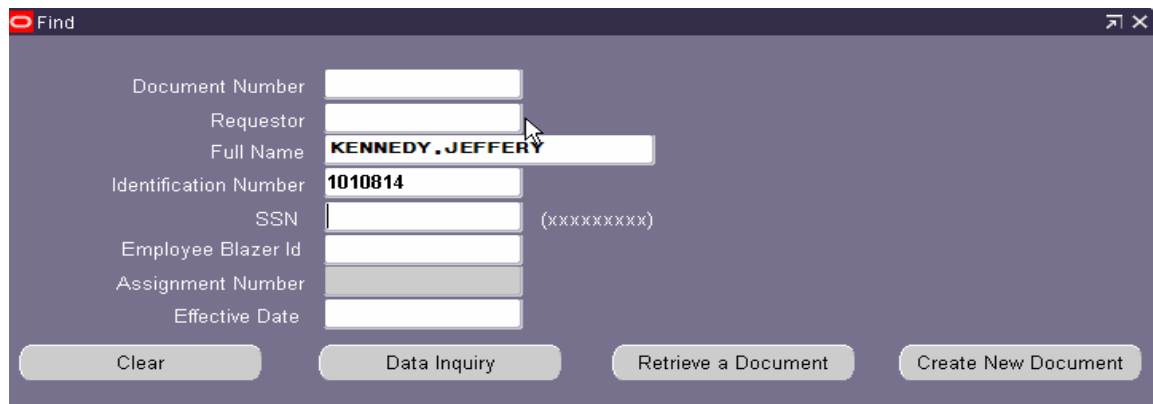
The **Budget Document Effective Date** will be determined by the University, based upon the upcoming fiscal year. The Office of the Provost will annually distribute salary and effective date guidelines; as well as, guidelines to assist with any exception letters that may be needed for salaries that exceed the established guidelines.

For a Budget Increase you should only have to change the **SALARY** form. However, the **LABOR SOURCES** and **ELEMENT ENTRIES** forms will also be open in case the funds will be coming from another source.

- When changing an employee’s **LABOR SOURCE** on a Budget document, the effective date of the Budget document **must be a future pay period**.
- When processing a Budget document with a **retro active** effective date (a date in which the payroll has already processed), you **will be allowed to change** the employee’s Labor Source; however, the effective date of the labor source change will default to the next available pay period. **In order to correct the labor source for past pay periods, you will need to complete the Salary Reclass Form.**
- If you need to change an employee’s Labor Source **prior** to the **Budget Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the Budget document.
- Once an employee’s Budget document has entered “**COMPLETE**”, a **Funding Source Change Document** with an effective date prior to the Budget Document **may not be created**.

UAB HR Officer → HR Transactions → ACT → Find Window

1. Use the **FIND WINDOW** to locate the employee.



The screenshot shows a 'Find' window with the following fields and values:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	KENNEDY, JEFFERY
Identification Number	1010814
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

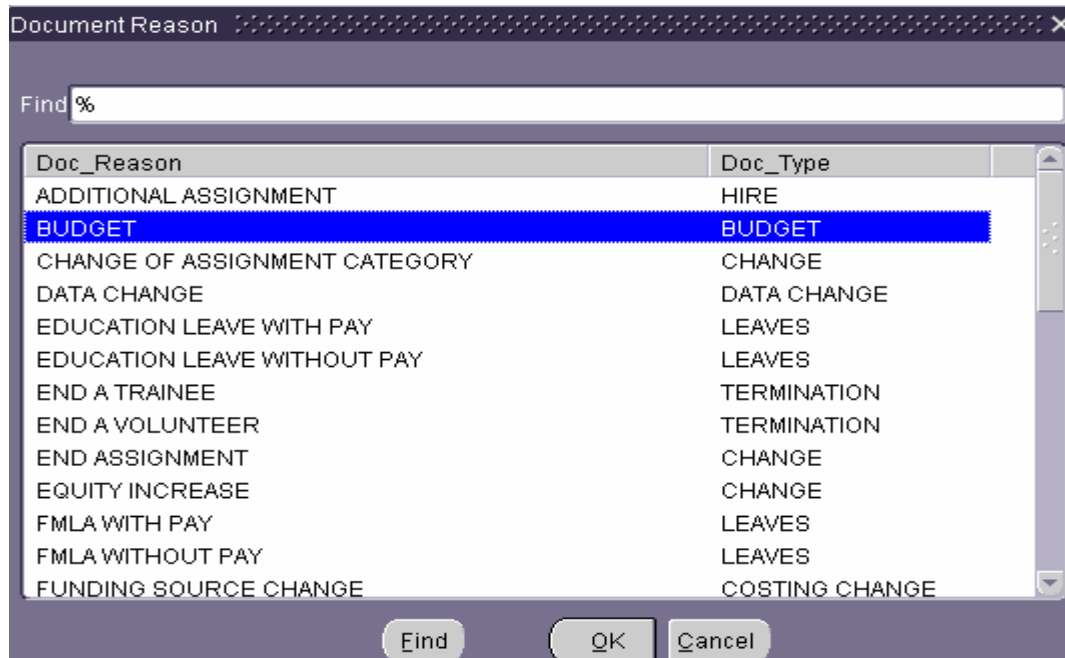
At the bottom of the window are four buttons: Clear, Data Inquiry, Retrieve a Document, and Create New Document.

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2. Click on the **CREATE NEW DOCUMENT** button.

Note: After you click on the **Create New Document** button you might see another window pop up. Some employees may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.

3. The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.
4. Use the **DOCUMENT REASON** LOV to choose **Budget** or type the word **Budget** in the **DOCUMENT REASON** field.



5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date. Remember to use the **DD-MMM-YYYY** format.

The screenshot shows the "ACT Main Form" window. The "Document Reason" field is set to "BUDGET". The "Effective Date" field is set to "01-OCT-2005". The "Requestor Name" field is set to "HALEY". There are checkboxes for "Attachments" and "Received". The "Document Number", "Document Status", "Workflow Type", and "Submit Date" fields are empty.

Document Reason	BUDGET	Document Number	
Effective Date	01-OCT-2005	Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

- **All Bi-Weekly paid employees must have Budget increase documents dated on a Sunday for payroll purposes.**
- **All Monthly paid employees must have Budget increase documents dated from the beginning of the month.**

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6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**.

ACT Main Form

Document Reason: **BUDGET** Document Number: **125816**
 Effective Date: **01-OCT-2005** Document Status: **OPEN**
 Requestor Name: **HALEY** Workflow Type: **BUDGET**
 Attachments Received Submit Date: _____

Person Data

Name: **Kennedy, Jeffery** Gender: **Male**
 Identification Number: **1010814** Ethnic Origin: **White / Non Hispanic**
 SSN: _____ Total Active Assignments: **1**
 Latest Hire Date: **25-JUN-2001** Total Annual Salary: **39,600.00**
 Date of Birth: **15-OCT-1967** Prior UAB Service

Assignment Data

Assignment Number: **1010814** Assignment Status: **Active Assignment**
 Assignment Category: **01 Regular FT** Organization: **112102000 Design Build Co**
 Job: **MC238E1.Estimator** Position: **112102000.04801.031001**
 FTE: **1** Primary: **Y**
 Assignment Salary: **39,600.00** Payroll: **Monthly**

Person Address Assignment Salary Element Entries Labor Sources

Comments: _____

Person Data Address Assignment Salary Element Entries Labor Sources

Save Submit Cancel this document Log Reassign

7. Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.

Salary (Create New Document)

Full Name: **KENNEDY, JEFFERY** Document Reason: **BUDGET**
 Identification Number: **1010814** Document Number: **125816**
 Assignment Number: **1010814** Document Status: **OPEN**
 Effective Date: **01-OCT-2005**

Component Reasons

Reason	Change Value	Change %

Use the down arrow to create multiple records. Change value = Difference in rate of pay.

	Current	Proposed
Assignment Salary	39,600.00	
Assignment Rate Pay	3,300.00	
FTE	1.00	
Hosp Calc Code		
Premium Plan	NA	
Salary Basis	Salary	
Payroll	Monthly	
Outside Income Source		
Outside Income	0.00	(Annual)
CFB Code		
Comments		

Return to Previous Form Save

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- Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.

Salary (Create New Document)

Full Name: **KENNEDY, JEFFERY** Document Reason: **BUDGET**
 Identification Number: **1010814** Document Number: **125816**
 Assignment Number: **1010814** Document Status: **OPEN**
 Effective Date: **01-OCT-2005**

Component Reasons

Reason	Change Value	Change %
[Dropdown]		

Use the down arrow to create multiple records.

Change value = Difference in rate of pay.

	Current	Proposed
Assignment Salary	39,600.00	
Assignment Rate Pay	3,300.00	
FTE	1.00	
Hosp Calc Code		
Premium Plan	NA	
Salary Basis	Salary	
Payroll	Monthly	
Outside Income Source		
Outside Income	0.00	
CFB Code		
Comments		

Return to Previous Form Save

- Select the appropriate reasons from the LOV or type the information in the **REASON** field.

Component Reason

Find: %

- Component Reason
- Adj to Min of Range**
- Adj to Next Step
- Award of Tenure
- Equity Adjustment
- Merit Increase

Find OK Cancel

Component Reasons

Reason	Change Value	Change %
[Dropdown]		

Use the down arrow to create multiple records.

Change value = Difference in rate of pay.

	Current	Proposed
Assignment Salary	29,863.60	
Assignment Rate Pay	12.17	
FTE	1.00	
Hosp Calc Code	D	
Premium Plan	NA	
Salary Basis	Hourly	
Payroll	Biweekly	
Outside Income Source		
Outside Income	0.00	
CFB Code		
Comments		

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10. Click in the **CHANGE VALUE** field; enter the hourly increase amount for biweekly paid employees or the monthly increase amount for salaried employees.

Example: *If an hourly paid employee currently earns \$10.00 per hour and will increase to \$10.80 per hour, enter **\$.80**. If a monthly paid employee currently earns \$3,300.00 per month and will increase to \$3,600.00 per month, enter **\$300.00**.*

Note: You may also enter a percentage change in the **CHANGE %** field instead of an amount in the **CHANGE VALUE** field.

Component Reasons	Reason	Change Value	Change %
	Merit Increase	300.00	9.09
Use the down arrow to create multiple records.			

Change value = Difference in rate of pay.

11. The **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered based upon the new rate of pay.

	Current	Proposed
Assignment Salary	39,600.00	43,200.00
Assignment Rate Pay	3,300.00	3,600.00

12. If the employee is receiving funds from either the VA or Eye Foundation, enter the information in the **OUTSIDE INCOME SOURCE** field, if applicable.

Note: There are only two outside income sources – VA and Eye Foundation. UAB recognizes these two entities because salary from these two sources may have an impact on the employee’s UAB additional life Insurance benefits.

13. Enter **the amount of income provided by this source** in the **OUTSIDE INCOME** field if applicable. This should be an annual amount.

14. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

15. Click on the **SAVE** button.

16. Click on the **RETURN TO PREVIOUS FORM** button.

17. If the employee’s current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a Budget Document, [click here](#).

Appoint, Change, Terminate (ACT) Documentation Budget ACT Document: Changing Labor Sources

1. If the labor sources are changing for an employee, click on the **LABOR SOURCES** button on the **ACT MAIN FORM**.

ACT Main Form

Document Reason: **BUDGET** Document Number: **125816**
 Effective Date: **01-OCT-2005** Document Status: **OPEN**
 Requestor Name: **HALEY** Workflow Type: **BUDGET**
 Attachments Received Submit Date: _____

Person Data

Name: **KENNEDY, JEFFERY** Gender: **Male**
 Identification Number: **1010814** Ethnic Origin: **White / Non Hispanic**
 SSN: _____ Total Active Assignments: **1**
 Latest Hire Date: **25-JUN-2001** Total Annual Salary: **39,600.00**
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Assignment Data

Assignment Number: **1010814** Assignment Status: **Active Assignment**
 Assignment Category: **01 Regular FT** Organization: **112102000 Design Build Co**
 Job: **MC238E1.Estimat** Position: **112102000.04801.031001**
 FTE: **1** Primary: **Y**
 Assignment Salary: **39,600.00** Payroll: **Monthly**

Person Address Assignment Salary Element Entries Labor Sources

Comments: _____

Person Data Address Assignment **Salary** Element Entries **Labor Sources**

Save Submit Cancel this document Log Reassign

2. The **LABOR SOURCES** form opens.

Labor Sources (Retrieve a Document)

Full Name: _____ Document Reason: **BUDGET**
 Identification Number: **1010814** Document Number: _____
 Assignment Number: **1010814** Document Status: **OPEN**
 Effective Date: **01-OCT-2005**

Assignment Salary: **43,200.00** Element Name: _____

Costing

Assignment Element

Current ID	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: _____ Total LD %: **100.00**

Return to Previous Form Save

Appoint, Change, Terminate (ACT) Documentation Budget ACT Document: Changing Labor Sources

Entering GL Funding Sources

Note: If you are entering new GL or GA information for an employee, you must stop the other labor sources by clicking in the **STOP** checkbox located to the left of each funding source before entering new ones.

Full Name: Kennedy, Jeffery | Document Reason: BUDGET
 Identification Number: 1010814 | Document Number: 125816
 Assignment Number: 1010814 | Document Status: OPEN
 Effective Date: 01-OCT-2005

Assignment Salary: 43,200.00 | Element Name: [Dropdown]

Costing

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: [Text Area] | Total LD %: 100.00

Buttons: Return to Previous Form, Save

3. If an employee has a GL funding source and this information is changing, click in the **GL CODE** field.

Costing

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01-OCT-2005							
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: [Text Area] | Total LD %: .00

4. Click on the LOV. This opens the **UAB_AKF FIND WINDOW**.

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5. Click on the LOV icon in the **ALIAS** field.
6. Enter **the new funding source account number** or use the **% WILD CARD** to perform a search. Enter as much information as possible to limit your search.
7. Once the new account number is entered, click on the **OK** button. The **UAB_AKF** window will open displaying the account string.

8. Type **"0" zero** in the **OBJECT** field. Click **OK**.
9. The **LABOR SOURCES** form opens displaying the account string information in the **GL CODE** field.

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005		2100669.000.110100000.112302000					

10. Type in the **percent of the employee's effort to be charged to this account** in the **%** field. Only one funding source is allowed for each record/row.

Total LD %									100.00
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Note: TOTAL LD% must equal 100% before you can save the document.

11. Repeat the above steps, as needed, for entering all GL account funding sources.

Appoint, Change, Terminate (ACT) Documentation Budget ACT Document: Changing Labor Sources

Entering Grant Funding Sources

1. If an employee is funded from a grant and this information is changing, click once in the **PROJECT** field of the next available row.

Assignment Salary: 43,200.00 Element Name: [dropdown]

Costing

Assignment Element

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005							
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: _____

Total LD % 100.00

- Choose the **project number** from the LOV in the **PROJECT** field or **type the grant number in the field**.
- Choose the **task number** from the LOV in the **Task** field or **type the number into the field**.
- Choose the **award number** from the LOV in the **AWARD** field or **type the number into the field**.
- Choose the **organization number** from the LOV in the **EXPENDITURE ORGANIZATION** field or type **the number into the field**. For the hospital, this number is **70**. For the university, the number is **10**.

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005	31-MAY-2006		223252	01.01	1523252	10	

2. Type in **the percent of the employee's effort to be charged to this account** in the % field. Only one funding source is allowed for each record/row.

Comments: _____

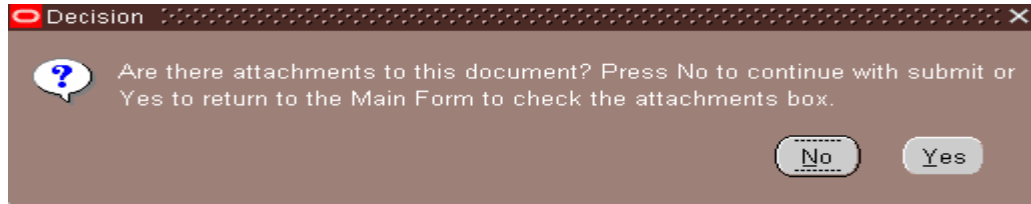
Total LD % 100.00

Note: TOTAL LD% must equal 100% before you can save the document.

3. Repeat the above steps, as needed, for entering all Grant funding sources.
4. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
5. Click on the **SAVE** button.

Appoint, Change, Terminate (ACT) Documentation Budget ACT Document: Changing Labor Sources

6. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
7. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
8. Once the document is submitted the following window appears.



9. Click **NO** to continue since **ATTACHMENTS** are not required.
10. The **DOCUMENT STATUS** changes to **READY**.

Note: *Once the Document Status changes to READY, all fields on all the forms will turn gray (inquiry or ready only).*

11. Once the Budget document is submitted, and the **DOCUMENT STATUS** changes to **READY**, the document has entered the Approval Path. The **DOCUMENT STATUS** will change throughout the levels of Approval. Once the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

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