

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

The **EQUITY INCREASE** Document Reason is used when Compensation has determined a salary inequity exists for an employee and approves an increase to correct the inequity. This document reason requires supporting documentation from Compensation for staff employees or a letter of justification approved by the Provost Office for faculty members.

An **EQUITY INCREASE** document usually requires changing the **salary information** only. However, the **LABOR SOURCES** and **ELEMENT ENTRIES** forms are available for change or update.

- When changing an employee's **LABOR SOURCE** information on an **Equity Increase** document, the effective date of the **Equity Increase** document **must be a future pay period**.
- When processing an **Equity Increase** 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 information; however, the effective date of the labor source change will default to the next available pay period. **In order to correct the labor source information for past pay periods, you will need to complete the Salary Reclass Form**.
- If you need to change an employee's Labor Source information **prior** to the **Equity Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Equity increase** document.
- Once an employee's **Equity Increase** document has entered "**COMPLETE**", a **Funding Source Change Document with** an effective date prior to the **Equity Increase may not be created**.

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UAB HR Officer → HR Transactions → ACT → Find Window

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

Find

Document Number

Requestor

Full Name

Identification Number

SSN

Employee Blazer Id

Assignment Number

Effective Date

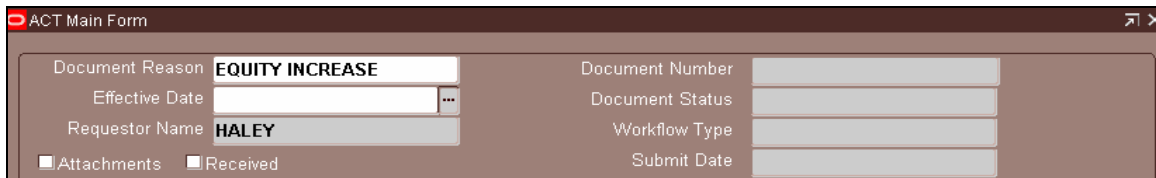
Clear Data Inquiry Retrieve a Document Create New Document

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

- 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.

- The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.
- Use the **DOCUMENT REASON** LOV to choose or type the words **Equity Increase** in the **DOCUMENT REASON** field.



The screenshot shows the 'ACT Main Form' window. The 'Document Reason' field is populated with 'EQUITY INCREASE'. Other fields include 'Effective Date', 'Requestor Name' (HALEY), 'Document Number', 'Document Status', 'Workflow Type', and 'Submit Date'. There are checkboxes for 'Attachments' and 'Received'.

- 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.

**Note:** The Document Effective Date for all bi-weekly paid employees receiving a Probationary Increase must be a Sunday.

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



The screenshot shows the 'ACT Main Form' window with the form filled out. The 'Document Reason' is 'EQUITY INCREASE', 'Effective Date' is '01 JUN 2006', and 'Requestor Name' is 'HALEY'. The 'Document Number' is '197076', 'Document Status' is 'OPEN', and 'Workflow Type' is 'CHANGE'. The 'Person Data' section includes Name 'Jacobs, Carol A.', Gender 'Female', Identification Number '1059348', Ethnic Origin 'White / Non Hispanic', SSN, Latest Hire Date '15 JAN 1986', Total Active Assignments '1', Date of Birth '16 JUL 1963', and Total Annual Salary '65,444.69'. The 'Assignment Data' section includes Assignment Number '1059348', Assignment Status 'Active Assignment', Assignment Category '01 Regular FT', Organization '708250000 Radiology-Hospi', Job 'FA364M0.Hospital Business', Position '708250000.00400.031001', FTE '1', Primary 'Y', Assignment Salary '65,444.69', and Payroll 'Monthly'. There are checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. A 'Comments' field is present. At the bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

- Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.
- Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.

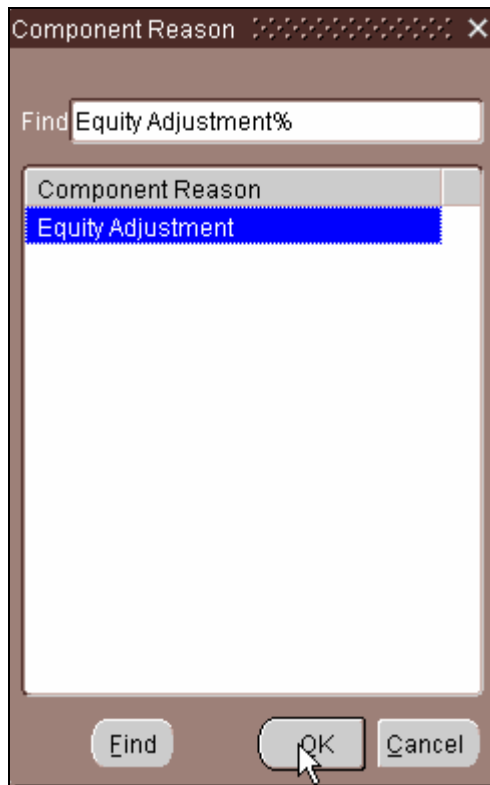


Reason	Change Value	Change %

Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

- Select **EQUITY INCREASE** from the LOV or type the information in the **REASON** field. Click **OK**.



Component Reason

Find: Equity Adjustment%

Component Reason

Equity Adjustment

Find OK Cancel

- 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 \$11.25 per hour, enter **\$1.25**. 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.

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Component Reasons	Reason	Change Value	Change %	
	Equity Adjustment	220.00	3.62	Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

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	65,444.69	68,084.69
Assignment Rate Pay	5,453.72	5,673.72

12. If processing an **Equity Increase** document for a **UAB Hospital** employee, click in the **HOSP CALC CODE** field; insert the appropriate **Hosp Calc Code**. For a listing and explanation of Hospital Calc codes, [click here](#).

FTE	1.00	
Hosp Calc Code	A	A

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

14. Click on the **SAVE** button.

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

16. If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting an **Equity Increase** document, [click here](#). If the employee's Labor Source information must be changed proceed on to Changing Labor Source Information.

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

### Changing Labor Source Information

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: **EQUITY INCREASE**      Document Number: **197076**  
 Effective Date: **01-JUN-2006**      Document Status: **OPEN**  
 Requestor Name: **HALEY**      Workflow Type: **CHANGE**  
 Attachments     Received      Submit Date: \_\_\_\_\_

**Person Data**

Name: **Jacobs, Carol A.**      Gender: **Female**  
 Identification Number: **1059348**      Ethnic Origin: **White / Non Hispanic**  
 SSN: \_\_\_\_\_      Total Active Assignments: **1**  
 Latest Hire Date: **15-JAN-1986**      Total Annual Salary: **65,444.69**  
 Date of Birth: **16-JUL-1963**       Prior UAB Service

**Assignment Data**

Assignment Number: **1059348**      Assignment Status: **Active Assignment**  
 Assignment Category: **01 Regular FT**      Organization: **708250000 Radiology-Hospi**  
 Job: **FA364M0.Hospital Business**      Position: **708250000.00400.031001**  
 FTE: **1**      Primary: **Y**  
 Assignment Salary: **65,444.69**      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.

Assignment Salary: **68,084.69**      Element Name: \_\_\_\_\_

**Costing**

Assignment    Element

Current	LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
			From Date	To Date						
<input checked="" type="checkbox"/>	<input type="checkbox"/>		27-JUL-2003		7151220.000.130000000.708250000					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**

### 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.

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

Assignment Salary: 60,870.04      Element Name: [ ]

**Costing**

Assignment    Element

Current	Effective Date			GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005		3101067.000.213101067.311401000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: \_\_\_\_\_      Total LD %: .00

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

**Costing**

Assignment    Element

Current	Effective Date			GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005		3101067.000.213101067.311401000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: \_\_\_\_\_      Total LD %: .00

- Click on the LOV. This opens the **UAB\_AKF FIND WINDOW**.

UAB\_AKF

ALIAS: [ ]

OK    Cancel    Clear    Help

- Enter **the new funding source account number** or use LOV to locate the correct account number.

**Note:** When using the **ALIAS** LOV, use the **% WILD CARD** to perform a search. Enter as much information as possible to limit your search.

- Once the new account number is entered, click on the **OK** button. The **UAB\_AKF** window will open displaying the account string.

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

17. 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.

**Note:** The Total LD % must total 100% before you can submit the document.

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

### **Entering Grant Funding Sources**

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

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Assignment Salary **43,200.00** Element Name

**Costing**

Assignment Element

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
LD	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							
<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		Effective Date		GL Code	Project	Task	Award	Exp Or	%
LD	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	31-MAY-2006		223252	01.01	1523252	10	

Comments: Total LD % **100.00**

20. 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.

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: Total LD % **100.00**

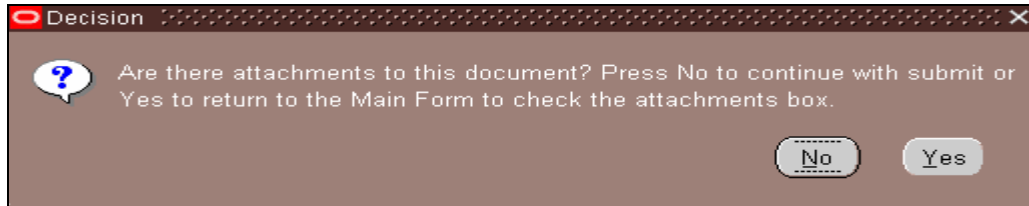
**Note:** The Total LD % must total 100% before you can submit the document.

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

## Appoint, Change and Terminate (ACT) Documentation Equity Increase

### Submitting the Document

1. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



3. Click **NO** to continue since **ATTACHMENTS** are not required.
4. 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).*

5. Once the **Equity Increase** document is submitted, and the **DOCUMENT STATUS** changes to **READY**, the document enters the Approval Path. The **DOCUMENT STATUS** will change throughout the levels of Approval. Once the document has been approved by all approval levels and Central Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

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