

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

The **Merit Increase** document reason is used when processing salary increases based upon performance or achievement at a time period other than October 1 of the fiscal year.

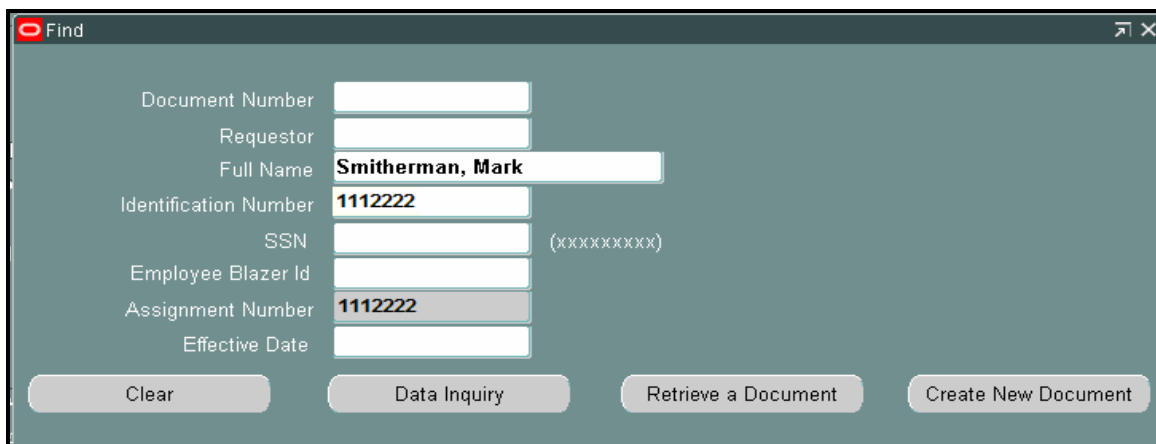
The **Merit Increase Effective Date** will be determined by University or Hospital Administration. Salary and effective date guidelines will be dispersed to appropriate departments as necessary. Guidelines addressing exceptions or Fixed Increment Payments will also be dispersed to departments as necessary.

When creating a **Merit Increase** Act document 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 **Merit Increase** document, the effective date of the **Merit Increase** document **must be a future pay period**.
- When processing a **Merit 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; 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 **Merit Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Merit Increase** document.
- Once an employee's **Merit Increase** document has entered "**COMPLETE**", a **Funding Source Change Document** with an effective date prior to the **Merit Increase** **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 window titled "Find" with a search form. The form contains the following fields and values:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	Smitherman, Mark
Identification Number	1112222
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	1112222
Effective Date	<input type="text"/>

At the bottom of the window, there 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 or type the words **Merit Increase** in the **DOCUMENT REASON** field.

Doc_Reason	Doc_Type
EQUITY INCREASE	CHANGE
FMLA WITH PAY	LEAVES
FMLA WITHOUT PAY	LEAVES
FUNDING SOURCE CHANGE	COSTING CHANGE
MEDICAL LEAVE WITH PAY	LEAVES
MEDICAL LEAVE WITHOUT PAY	LEAVES
MERIT INCREASE	CHANGE
MILITARY LEAVE WITH PAY	LEAVES
MILITARY LEAVE WITHOUT PAY	LEAVES
NONRECURRING ELEMENT	ELEMENTS
OJI LEAVE WITH PAY	LEAVES
OJI LEAVE WITHOUT PAY	LEAVES
OJI/FAMILY MEDICAL LEAVE	LEAVES

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.

ACT Main Form

Document Reason: MERIT INCREASE

Effective Date: 02-APR-2006

Requestor Name: HALEY

Attachments Received

Document Number: []

Document Status: []

Workflow Type: []

Submit Date: []

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

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

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (MERIT INCREASE), Effective Date (02-APR-2006), Requestor Name (HALEY), Document Number (171102), Document Status (OPEN), Workflow Type (CHANGE), and Submit Date.
- Person Data:** Name (Smitherman, Mark), Gender (Male), Identification Number (1112222), Ethnic Origin (White / Non Hispanic), SSN, Latest Hire Date (02-Mar-2004), Date of Birth (11-Nov-1966), Total Active Assignments (1), Total Annual Salary, and Prior UAB Service checkbox.
- Assignment Data:** Assignment Number (1112222), Assignment Status (Active Assignment), Assignment Category (04 Irregular), Job (HN010N0.Registered Nurse), FTE (.2), Assignment Salary, Organization (703450000 Emergency Serv), Position (703450000.82104.041206), Primary (Y), and Payroll (Biweekly).
- Navigation and Actions:** Checkboxes for Person, Address, Assignment, Salary, Element Entries, and Labor Sources. A Comments field. Buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

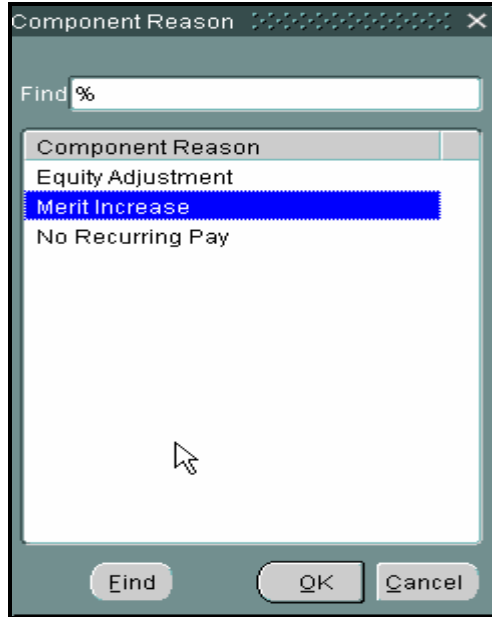
7. Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.

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

The screenshot shows a close-up of the 'Component Reasons' section. It features a table with the following columns: Reason, Change Value, and Change %. The 'Reason' column is highlighted in yellow and circled in red. To the right of the table, there is a note: 'Change value = Difference in rate of pay.' Below the table, it says 'Use the down arrow to create multiple records.'

9. Select **MERIT INCREASE** from the LOV or type the information in the **REASON** field.

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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 \$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.

Component Reasons	Reason	Change Value	Change %	
	Merit Increase	1.25	6.04	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	39,600.00	43,200.00
Assignment Rate Pay	3,300.00	3,600.00

12. If processing a **Merit 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	0.20	
Hosp Calc Code	RI	

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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 a **Merit Increase** document, [click here](#). If the employee's Labor Source information must be changed proceed on to step 17.

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17. 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: **MERIT INCREASE** Document Number: **171102**
 Effective Date: **02-APR-2006** Document Status: **OPEN**
 Requestor Name: **HALEY** Workflow Type: **CHANGE**
 Attachments Received Submit Date: _____

Person Data

Name: **Smitherman, Mark** Gender: **Male**
 Identification Number: **1112222** Ethnic Origin: **White / Non Hispanic**
 SSN: _____ Total Active Assignments: **1**
 Latest Hire Date: **02-Mar-2004** Total Annual Salary: _____
 Date of Birth: **11-Nov-1966** Prior UAB Service

Assignment Data

Assignment Number: **1112222** Assignment Status: **Active Assignment**
 Assignment Category: **04 Irregular** Organization: **703450000 Emergency Serv**
 Job: **HN010N0.Registered Nurse** Position: **703450000.82104.041206**
 FTE: **.2** Primary: **Y**
 Assignment Salary: _____ Payroll: **Biweekly**

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 << < > >> *

18. The **LABOR SOURCES** form opens.

Labor Sources (Create New Document)

Full Name: **Smitherman, Mark** Document Reason: **MERIT INCREASE**
 Identification Number: **1112222** Document Number: **171102**
 Assignment Number: **1112222** Document Status: **OPEN**
 Effective Date: **02-APR-2006**

Assignment Salary: _____ Element Name: _____

Costing

Assignment		Element								
Current LD	Stop	Effective Date	To Date	GL Code	Project	Task	Award	Exp Or	%	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06-SEP-2005		7120380.000.130000000.703450000					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

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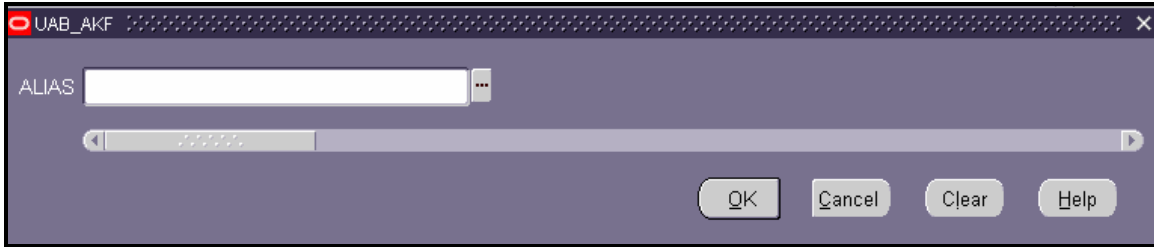
Entering GL Funding Sources

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.

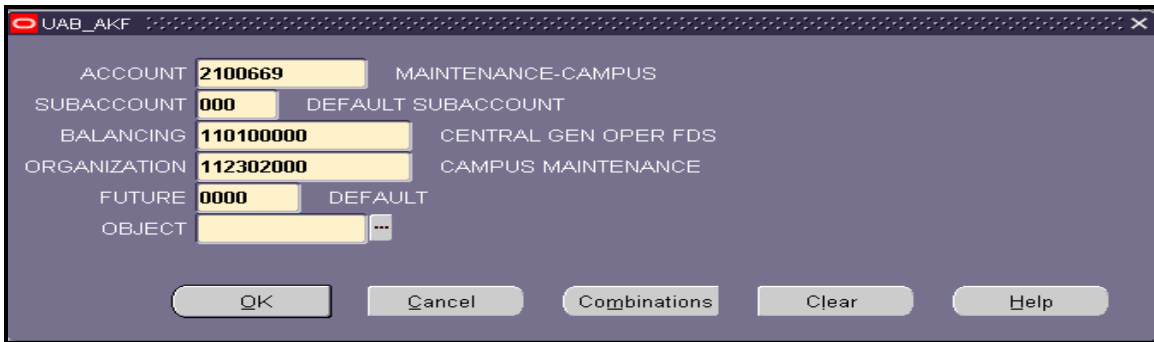
19. If an employee has a GL funding source and this information is changing, click in the **GL CODE** field.

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

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21. Click on the LOV icon in the **ALIAS** field.
22. 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.
23. Once the new account number is entered, click on the **OK** button. The **UAB_AKF** window will open displaying the account string.



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

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
ID	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					

26. 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.



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

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Entering Grant Funding Sources

28. 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: []

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**.

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	31-MAY-2006		223252	01.01	1523252	10	

Comments: _____ Total LD % 100.00

29. 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.

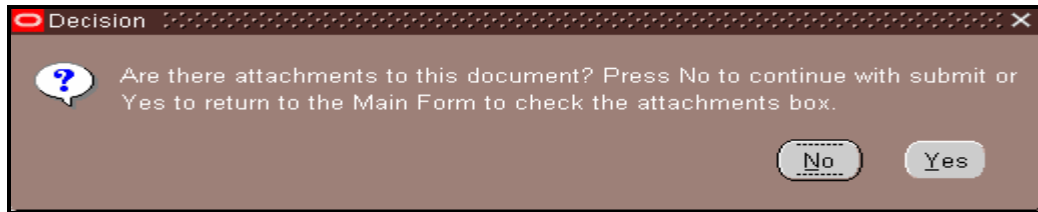
30. Repeat the above steps, as needed, for entering all Grant funding sources.

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

32. Click on the **SAVE** button.

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



36. Click **No** to continue since **ATTACHMENTS** are not required.
37. 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).*

38. Once the **Merit 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**.

[**RETURN TO TOP**](#)