Appoint, Change and Terminate (ACT) Documentation
Reclassification Document

The **RECLASSIFICATION** document reason is used when an employee will maintain the ***same position number*** with a ***different job title*** within the ***same department***.

(Example of when the Reclassification document reason is used for Staff employees includes: Office Service Specialist II to Office Associate I or Clinical Research Nurse to Research Nurse Coordinator). (Example of when the Reclassification document reason is used for Faculty includes: Professor to Professor/Chairman, or vice versa; this document reason should be a very rare occurrence for faculty).

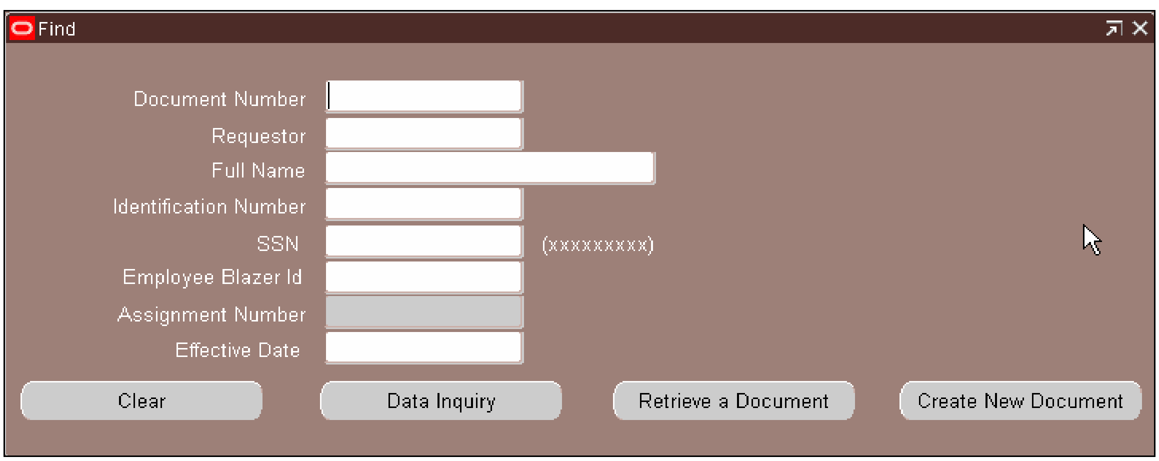
The **RECLASSIFICATION** document reason requires supporting documentation of approval from Compensation; and **may or may not** involve a salary change.

The **ASSIGNMENT, SALARY, ELEMENT ENTRIES** and **LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields only.

UAB HR Officer → HR Transactions → ACT → Find Window

---

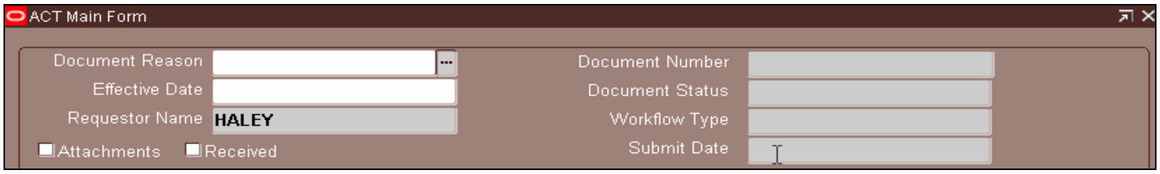
1. Use the **FIND WINDOW** to locate the employee.



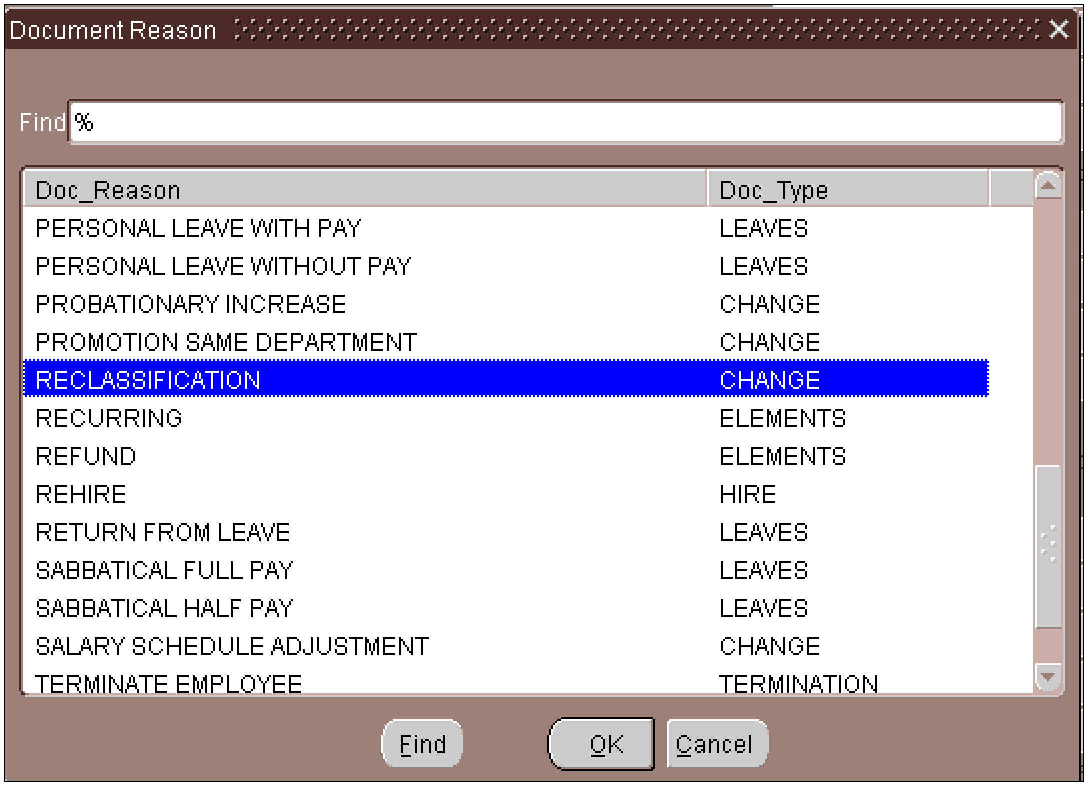
2. Click on the **CREATE NEW DOCUMENT** button.

   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 word ***Reclassification*** 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.

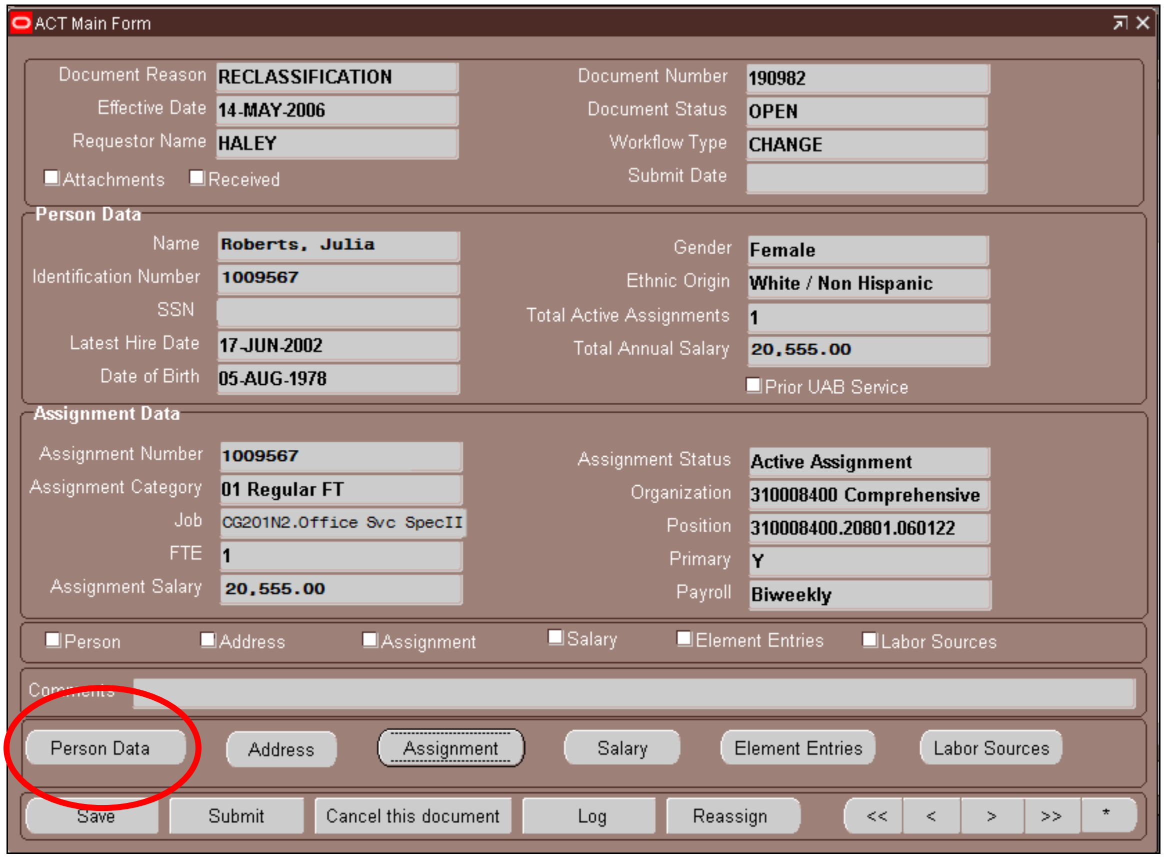
   Note: ***The Document Effective Date for all bi-weekly paid employees receiving a reclassification must be a Sunday. If the Labor Source(s) are changing, the Document Effective Date must be a future date that is beyond the current pay period for biweekly paid employees. Verify payroll schedules before submitting the document. Click here to view biweekly and monthly payroll schedules.***

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

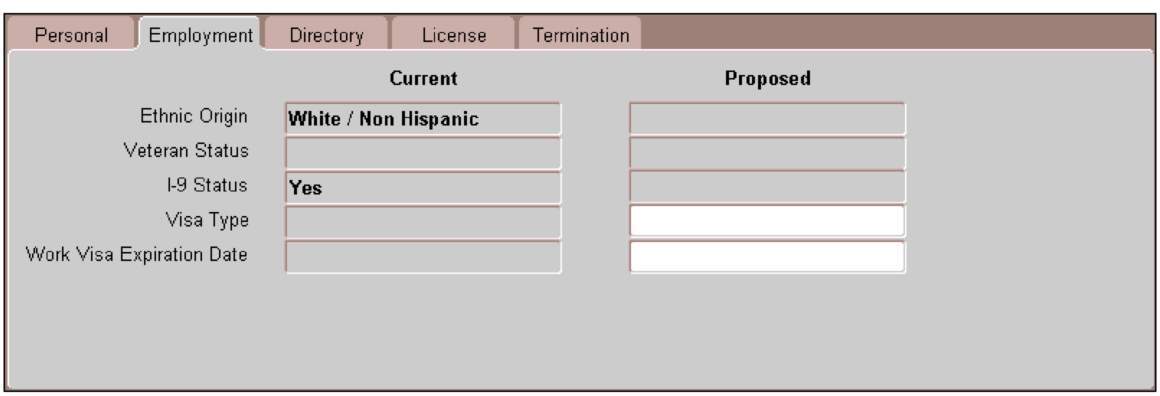
7. If the employee's personal information ***will not*** be changing, ***click here***. To make changes in the employee's personal information, proceed onto ***Step #8***.

Changing Personal Data

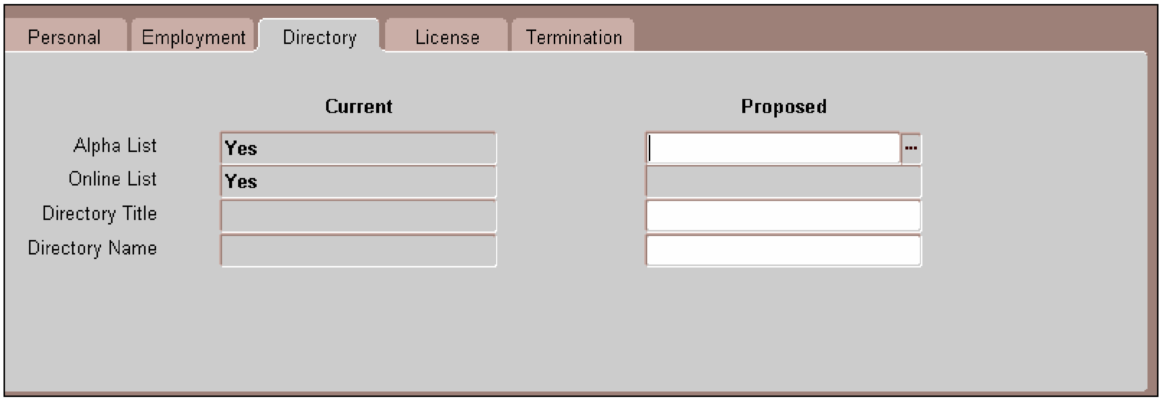
1. If ***personal information*** pertaining to the employee is changing, click on the **PERSON DATA** button. All fields and tabs will be view only (gray) except for **VISA**, **DIRECTORY, LICENSE** and **TERMINATION** tabs; as well as the **SCHOOLS AND COLLEGES** button.



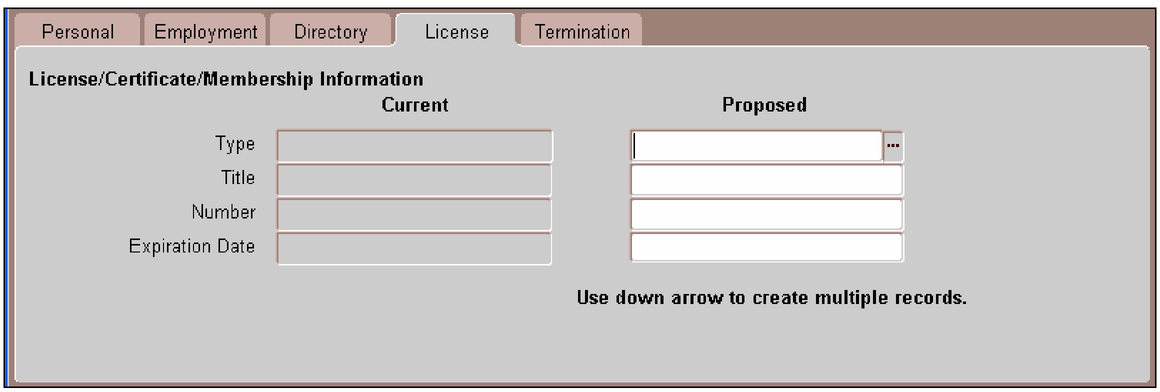
   a. If **VISA** information needs to be changed, click on the **EMPLOYMENT** tab. Select the correct Visa type from the **VISA TYPE** LOV; enter the correct **WORK VISA EXPIRATION DATE**. Click on the **SAVE** button at the bottom of the form.



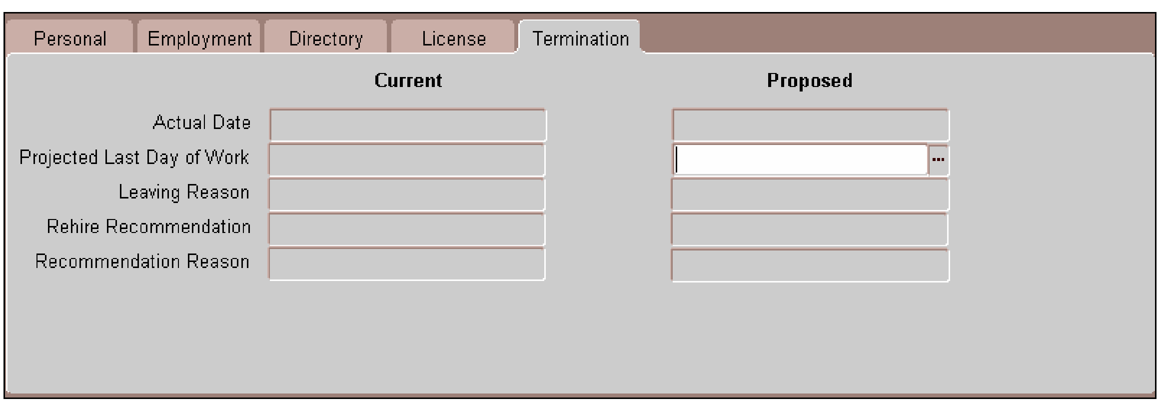
b. If **DIRECTORY** information needs to be added or changed, click on the **DIRECTORY** tab. Click on the **SAVE** button after entering the information.



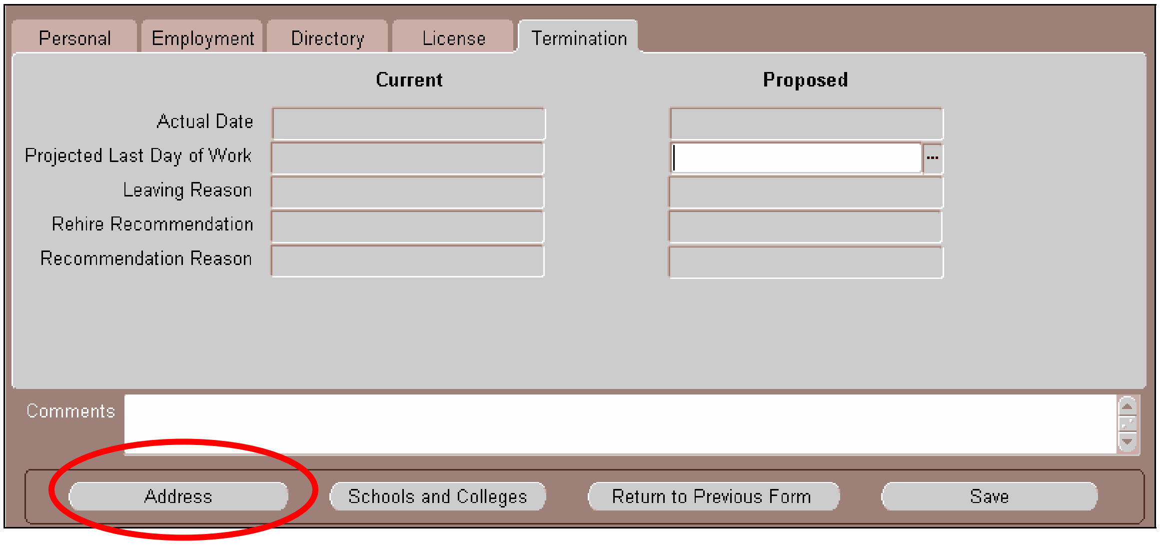
c. If **LICENSE** information needs to be added or changed, click on the **LICENSE** tab; choose the appropriate entry from the **TYPE** field LOV. Click on the **SAVE** button after entering the information



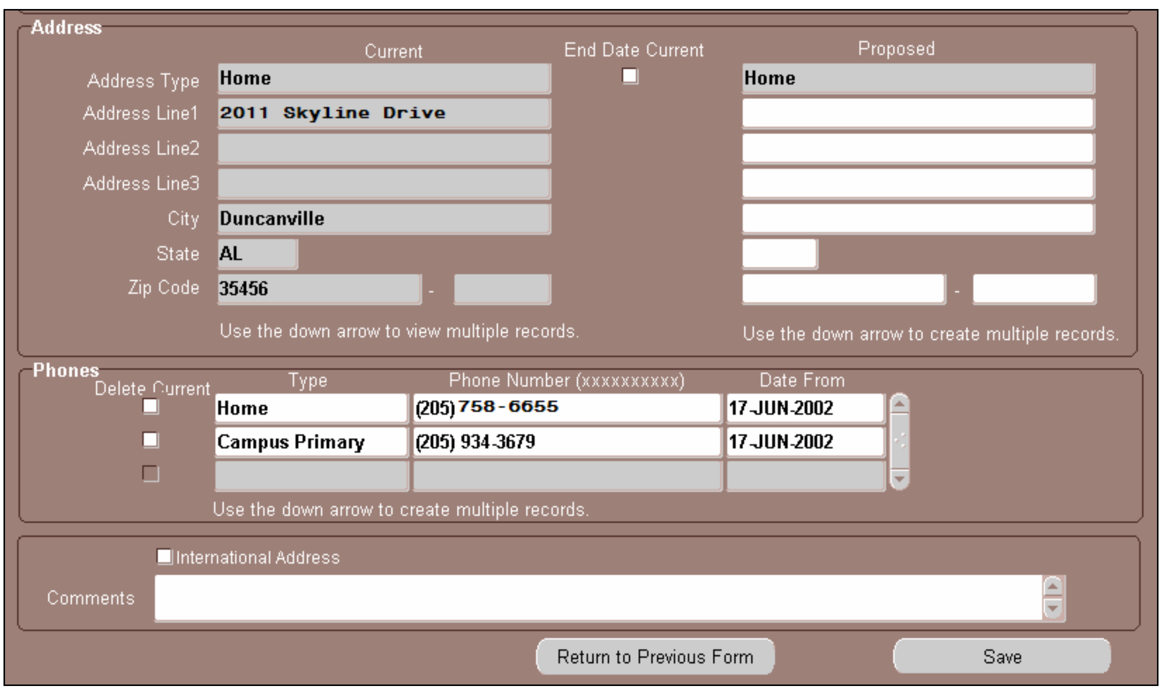
d. If the assignment has a known termination or end date, click on the **TERMINATION** tab; enter the termination or end date in the **PROJECTED LAST DAY OF WORK** field. Click on the **SAVE** button after entering the information.



2. If the employee's ***address and/or phone information*** is changing, click on the **ADDRESS** button. The **ADDRESS** button is located on the **ACT MAIN FORM** and at the bottom of the **PERSON DATA** form.

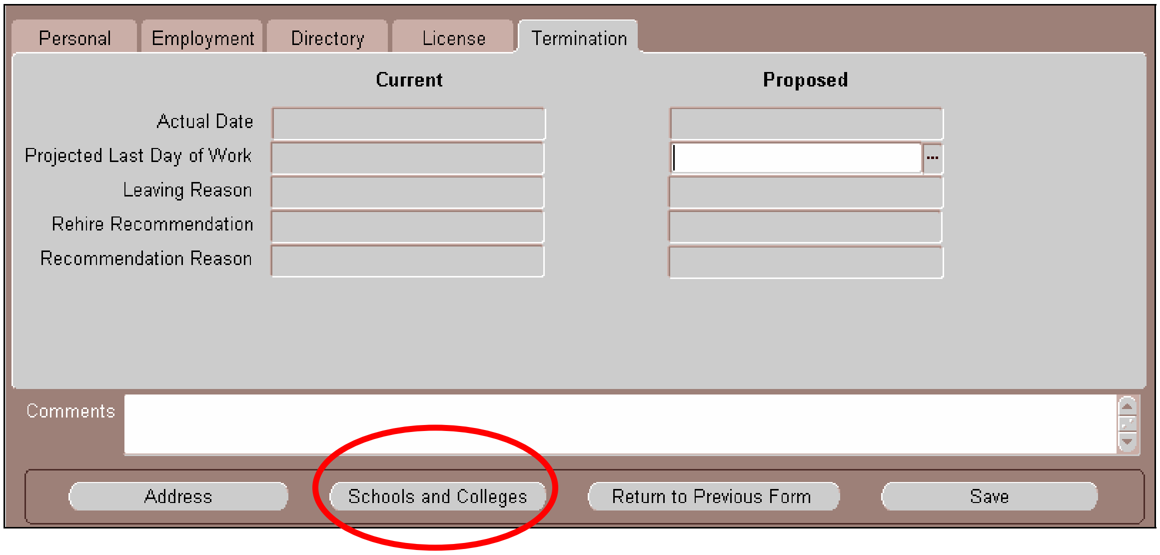


   a. For Instructions on entering or changing address and phone information, [click here.](#)

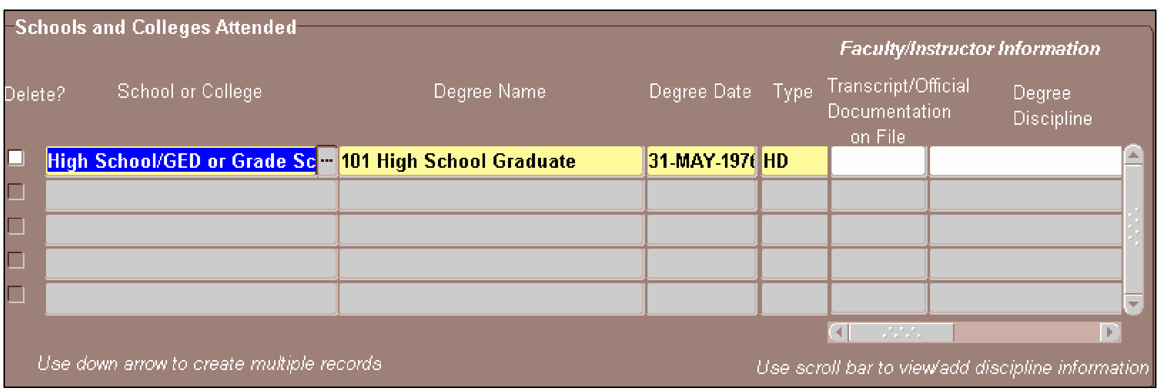


   b. Once **ADDRESS AND PHONE** information has been updated, click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM.**

3. If the employee's ***educational information*** is changing, click on the **SCHOOLS AND COLLEGES** button located on the bottom of the **PERSON DATA** form.



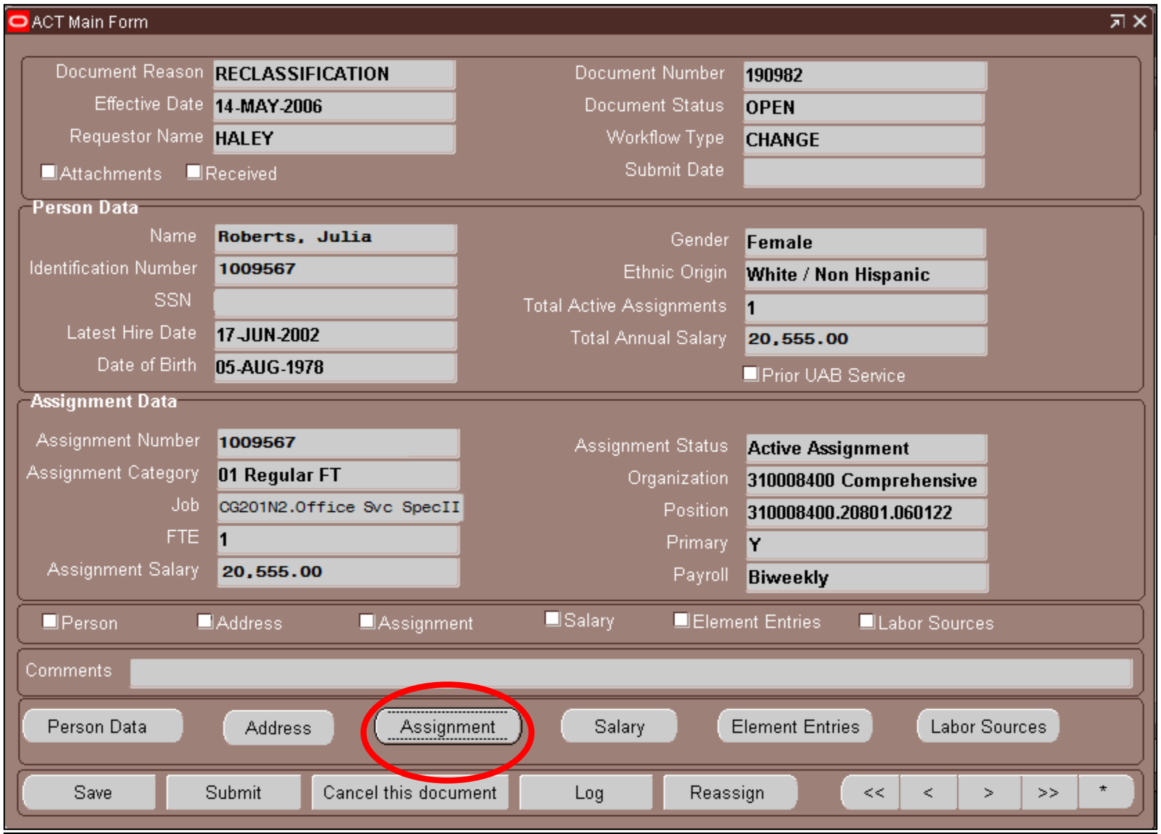
   a. For detailed instructions on entering **SCHOOLS AND COLLEGES** information, ***click here.*** Click on the **SAVE** button after entering the information.



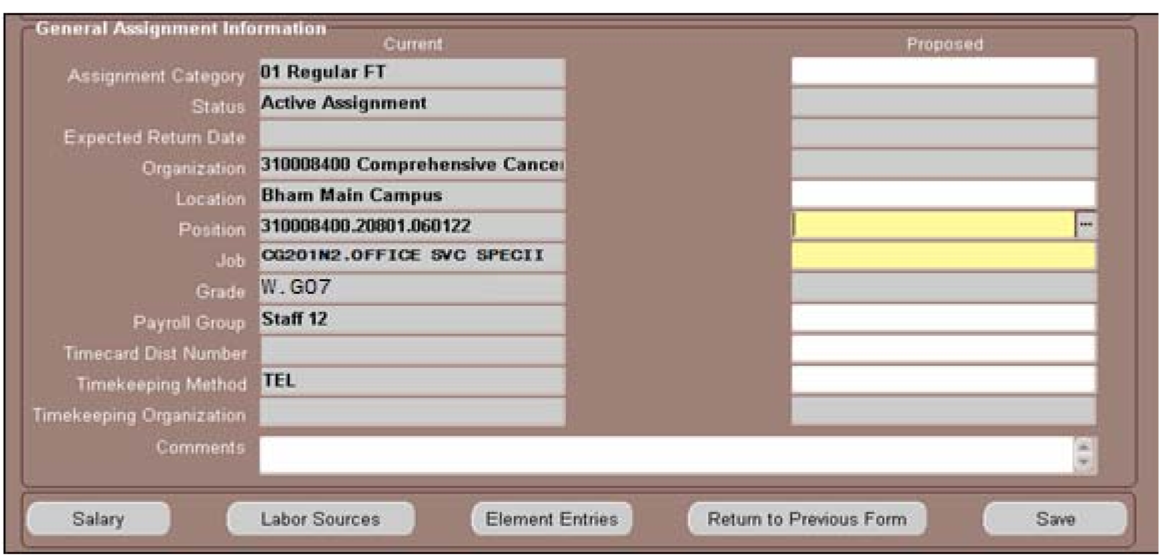
   b. Click on the **RETURN TO PREVIOUS** button to the **PERSON DATA** form. From the **PERSON DATA** form click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

Changing Assignment Information

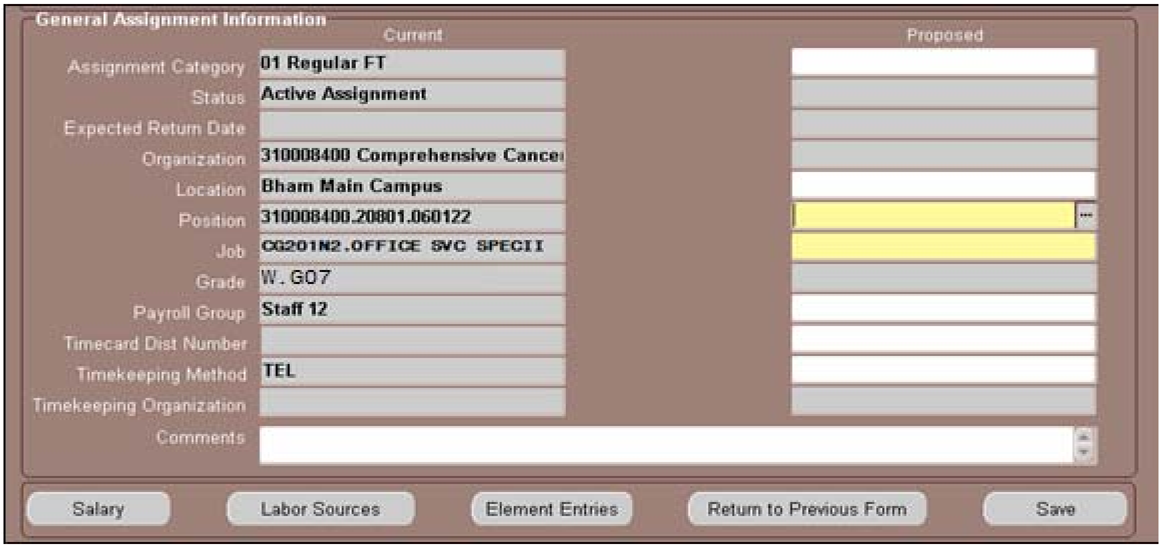
1. To change the employee's ***assignment information***, click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**.



2. If the employee's **ASSIGNMENT CATEGORY** will be changing, select the appropriate **ASSIGNMENT CATEGORY** from the LOV or type it in the field. This is not a required field when using the **RECLASSIFICATION** document reason.

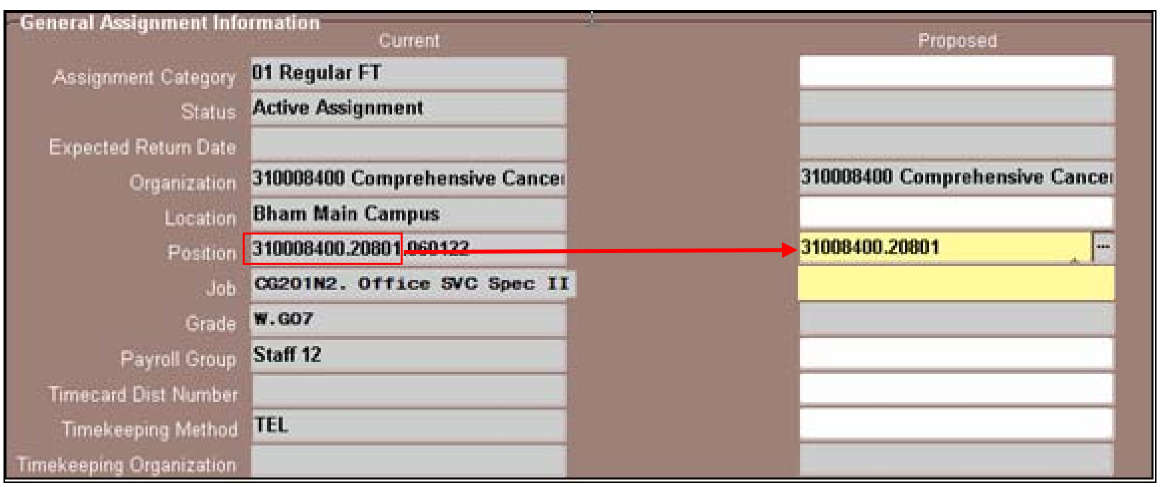


3. The **POSITION** and **JOB** fields are required fields when using the **RECLASSIFICATION** document reasons. Click in the **POSITION** field.



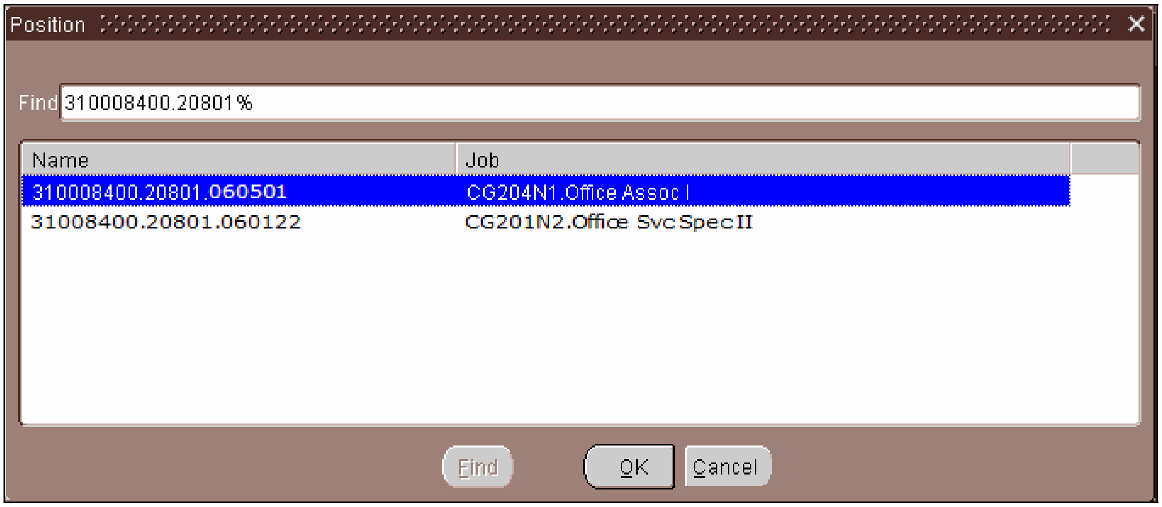
Note: When using the RECLASSIFICATION document reason the employee is to maintain the ***SAME*** position number.

4. Type in the **POSITION** field the ***first two segments*** of the ***Current Position String. See example below:***



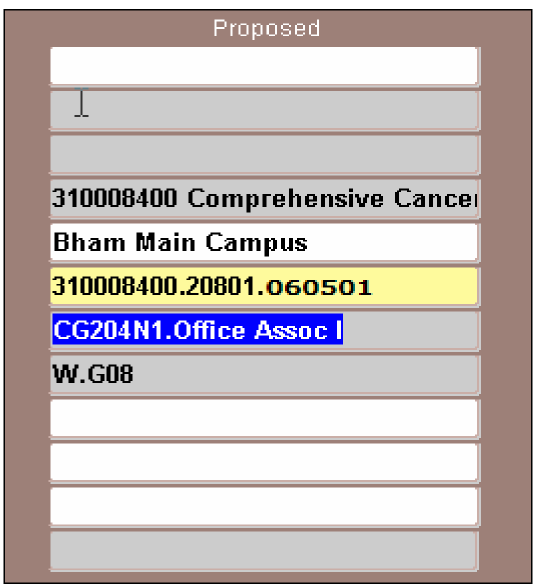
5. After entering the ***first two segments*** of the ***Current Position String***; click in the **JOB** field.

6. The following window will open.



Note: Two position strings will display; the current position string and Job title; as well as, the <u>new</u> reclassified position string and Job Title. If the reclassified position and job title does not appear in the listing, contact Budget Administration for assistance.

7. Select the ***new reclassified position string and job title***; click **OK**. The selection of the position string populates **JOB** and **GRADE** fields.



8. The **LOCATION, PAYROLL GROUP,** and all three **TIMEKEEPING** fields are available for change or update if necessary.

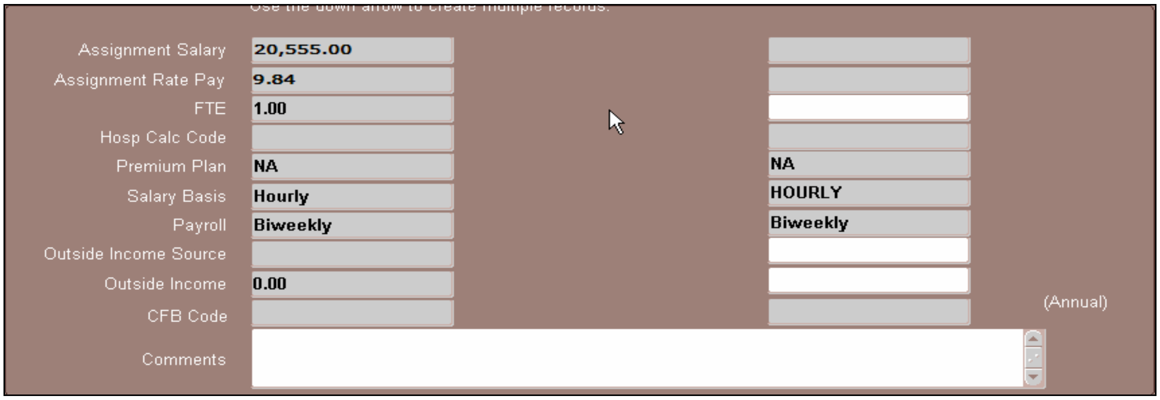
9. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.

10. Click on the **SAVE** button.

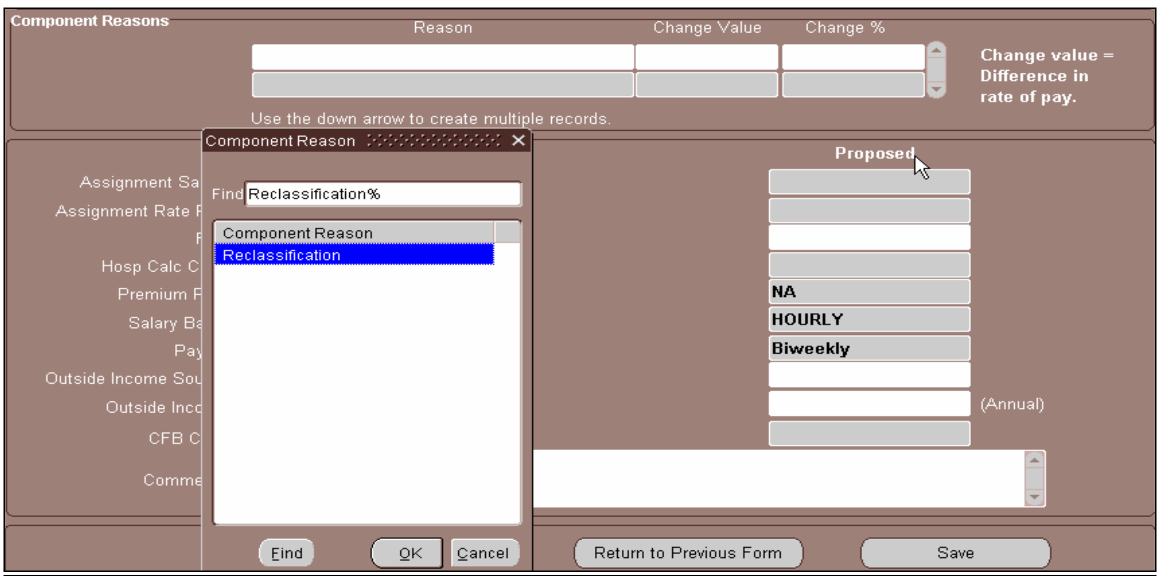
11. Click on the **RETURN TO PREVIOUS FORM** button.

Changing Salary Information

1. To change the Salary information, click on the **SALARY** button, located on either the **ACT MAIN FORM** or on the **ASSIGNMENT** form.



2. Click in the **REASONS** field located at the top of the form, select **RECLASSIFICATION** from the LOV.



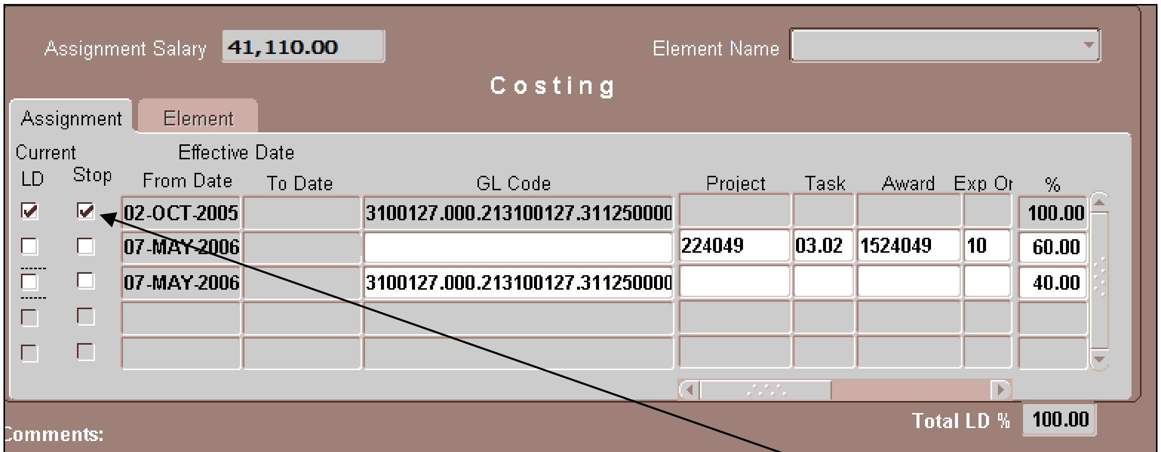
3. Enter the amount of increase or decrease in the ***hourly rate*** (for a bi-weekly paid employee) or the amount of increase or decrease in the ***monthly rate*** (for a salaried employee) in the **CHANGE VALUE** field. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.

4. If the **FTE** is changing, enter the ***full-time equivalency*** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.
5. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.

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

Changing Labor Source Information (General Ledger)

1. If the labor sources are changing for the employee, click on the **Labor Sources** button located at the bottom of the **Assignment Form** or from the **ACT Main Form.**



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

2. If the employee has a GL funding source, click in the GL Code field.

   e. Click on the **GL Code** LOV. This opens the **UAB_AKF Find** window.

   f. Enter the ***ten-digit GL Account number*** in the **ALIAS** field; click **OK**. This opens the window below. All but the **Object** field has been auto populated.

   g. Click in the **Object** field and enter ***Zero*** **(0)**; Click **OK**. You will be taken back to the **Labor Source** form.

   h. Type in the ***percent of the employee's funding*** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

   i. Repeat the above steps to enter all ***GL account*** funding sources. The **Total LD %** field has to total **100%** before you can save the document.

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

   j. Type the ***project number*** in the **Project** field or choose the ***Project number*** from the LOV. Press the **Tab** key or click in the next **Task** field.

k. Type the ***task number*** in the **TASK** field or choose the ***Task number*** from the LOV. **TAB** to the **AWARD** field or click in the **AWARD** field.

c. Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field.

d. Type in the ***organization number*** or choose the ***Expenditure Organization number*** from the LOV.

<u>Note: For the hospital, this will be 70. For the university, this will be 10.</u>

e. Type in the ***percent of the employee's effort*** to be charged to the project number in the **%** field.

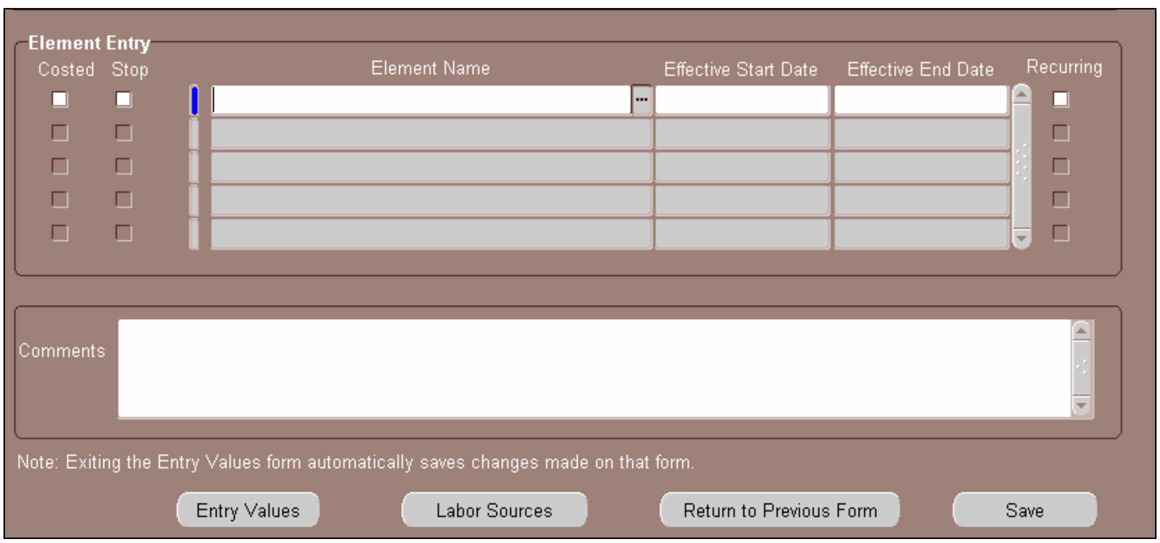
***Note: TOTAL LD% must equal 100% before you can save the document*.**

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

g. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

<u>Changing Element Entries</u>

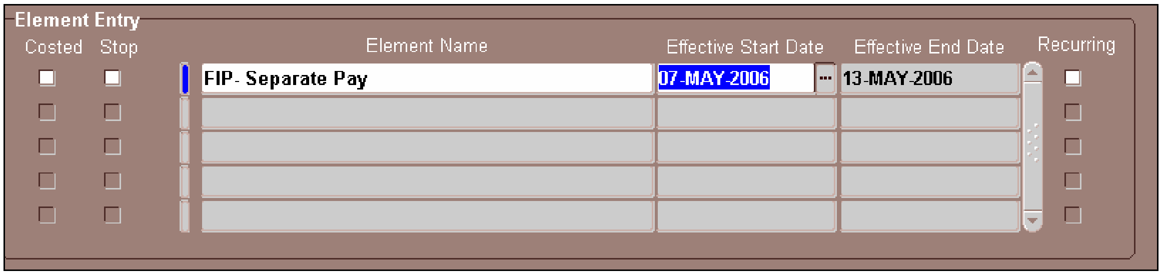
1. If you are adding or changing elements for the employee, click on the **ELEMENT ENTRIES** button located on the **ACT MAIN FORM** and the **ASSIGNMENT FORM**.



2. Click inside the **ELEMENT NAME** field; select the element name from the LOV or ***type in the appropriate element name*** in the field.

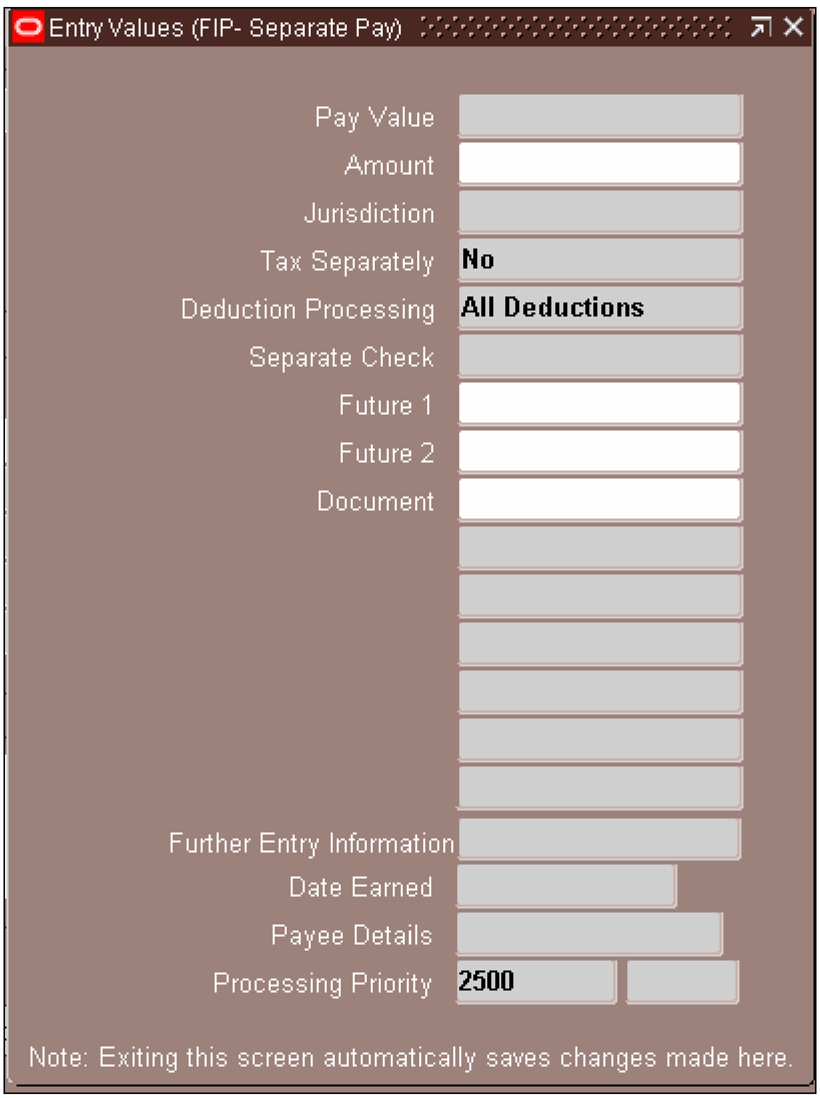
3. The **EFFECTIVE START DATE** will automatically be entered. It is pulled from the Document Effective Date.

4. The **EFFECTIVE END DATE** will be the end of the pay period. This will be automatically entered.



5. To enter the amount, click on the **SAVE** button first. ***Remember you must save your changes before you will be allowed to open the Entry Values.***

6. Click on the **ENTRY VALUES** button.



l. Enter the information in the applicable fields. The element will determine the fields that open on this form.

m. Click on the **X** at the tope of **ENTRY VALUES** window to close and save.

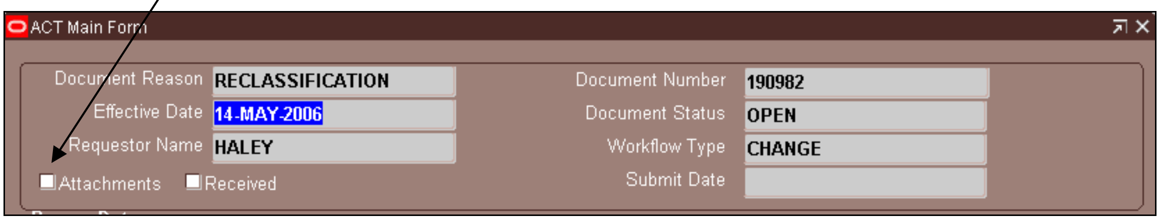
7. Continue these steps, as needed, to enter other elements.

8. Click on the **SAVE** button.

9. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

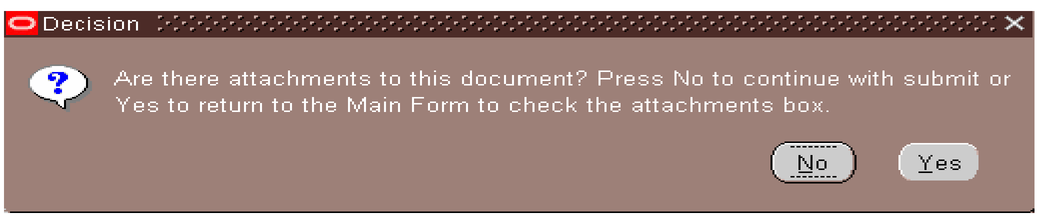
Submitting the Document

1. Click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. ***Click here*** for a listing of attachments required by Records Administration.



2. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.

3. Once the document is submitted the following window appears.



4. Click **YES** or **NO**, depending on whether **ATTACHMENTS** are required.

5. 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).

6. Once the 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