

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**.

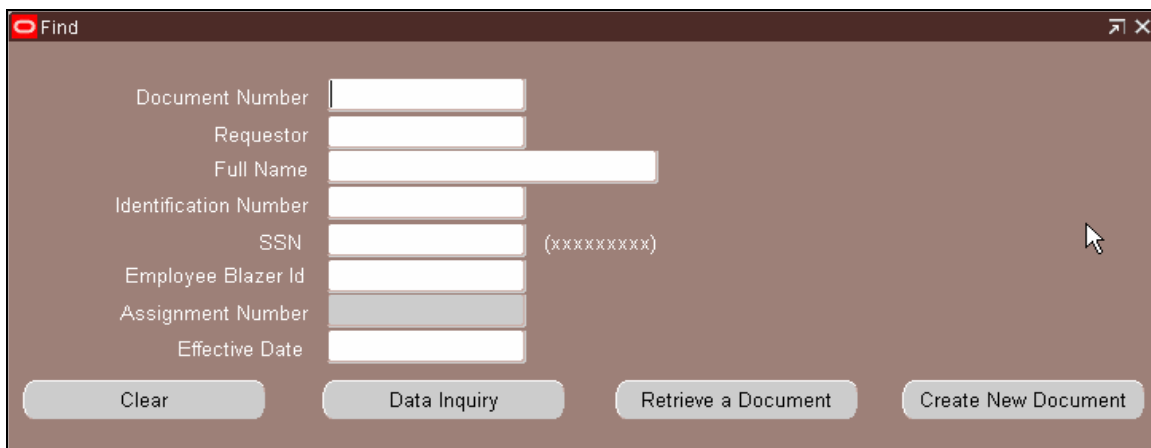
(Example of when the Reclassification document reason is used for Staff employees includes: Office Service Specialist II to Office Associate I or Clinical Research Nurse to Research Nurse Coordinator). (Example of when the Reclassification document reason is used for Faculty includes: Professor to Professor/Chairman, 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.



The screenshot shows a web-based 'Find' window. It features a search form with the following fields: Document Number, Requestor, Full Name, Identification Number, SSN (with a placeholder '(xxxxxxxx)'), Employee Blazer Id, Assignment Number, and Effective Date. Below the form are four buttons: 'Clear', 'Data Inquiry', 'Retrieve a Document', and 'Create New Document'. A mouse cursor is visible over the SSN field.

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.

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ACT Main Form

Document Reason [dropdown] Document Number [text]
Effective Date [text] Document Status [text]
Requestor Name **HALEY** Workflow Type [text]
 Attachments Received Submit Date [text]

- Use the **DOCUMENT REASON** LOV to choose or type the word **Reclassification** in the **DOCUMENT REASON** field.

Document Reason

Find %

Doc_Reason	Doc_Type
PERSONAL LEAVE WITH PAY	LEAVES
PERSONAL LEAVE WITHOUT PAY	LEAVES
PROBATIONARY INCREASE	CHANGE
PROMOTION SAME DEPARTMENT	CHANGE
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES
SABBATICAL FULL PAY	LEAVES
SABBATICAL HALF PAY	LEAVES
SALARY SCHEDULE ADJUSTMENT	CHANGE
TERMINATE EMPLOYEE	TERMINATION

Find End OK Cancel

- 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.*

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

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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.

	Current	Proposed
Ethnic Origin	White / Non Hispanic	
Veteran Status		
I-9 Status	Yes	
Visa Type		
Work Visa Expiration Date		

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

Personal	Employment	Directory	License	Termination
Current				
Alpha List		<input type="text" value="Yes"/>		<input type="text" value=""/>
Online List		<input type="text" value="Yes"/>		<input type="text" value=""/>
Directory Title		<input type="text" value=""/>		<input type="text" value=""/>
Directory Name		<input type="text" value=""/>		<input type="text" value=""/>
Proposed				
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>

- 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

Personal	Employment	Directory	License	Termination
License/Certificate/Membership Information				
Current				
Type		<input type="text" value=""/>		<input type="text" value=""/>
Title		<input type="text" value=""/>		<input type="text" value=""/>
Number		<input type="text" value=""/>		<input type="text" value=""/>
Expiration Date		<input type="text" value=""/>		<input type="text" value=""/>
Proposed				
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>
Use down arrow to create multiple records.				

- 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.

Personal	Employment	Directory	License	Termination
Current				
Actual Date		<input type="text" value=""/>		<input type="text" value=""/>
Projected Last Day of Work		<input type="text" value=""/>		<input type="text" value=""/>
Leaving Reason		<input type="text" value=""/>		<input type="text" value=""/>
Rehire Recommendation		<input type="text" value=""/>		<input type="text" value=""/>
Recommendation Reason		<input type="text" value=""/>		<input type="text" value=""/>
Proposed				
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>
		<input type="text" value=""/>		<input type="text" value=""/>

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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.

The screenshot shows the 'ACT MAIN FORM' with tabs for Personal, Employment, Directory, License, and Termination. The 'Current' and 'Proposed' sections contain fields for Actual Date, Projected Last Day of Work, Leaving Reason, Rehire Recommendation, and Recommendation Reason. At the bottom, the 'Address' button is circled in red, along with 'Schools and Colleges', 'Return to Previous Form', and 'Save' buttons.

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

The screenshot shows the 'Address' and 'Phones' sections. The 'Address' section has 'Current' and 'Proposed' columns with fields for Address Type, Address Line1-3, City, State, and Zip Code. The 'Phones' section has a table with columns for Delete, Current, Type, Phone Number, and Date From. The 'Save' button is highlighted.

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		Home	(205) 758-6655	17-JUN-2002
<input type="checkbox"/>		Campus Primary	(205) 934-3679	17-JUN-2002
<input type="checkbox"/>				

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

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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.

The screenshot shows the 'PERSON DATA' form with tabs for Personal, Employment, Directory, License, and Termination. The form is divided into 'Current' and 'Proposed' sections. The 'Current' section has fields for Actual Date, Projected Last Day of Work, Leaving Reason, Rehire Recommendation, and Recommendation Reason. The 'Proposed' section has corresponding empty fields. Below these is a 'Comments' text area. At the bottom, there are four buttons: 'Address', 'Schools and Colleges' (circled in red), 'Return to Previous Form', and 'Save'.

- a. For detailed instructions on entering **SCHOOLS AND COLLEGES** information, [click here](#). Click on the **SAVE** button after entering the information.

The screenshot shows the 'Schools and Colleges Attended' table. The table has columns: Delete?, School or College, Degree Name, Degree Date, Type, Transcript/Official Documentation on File, and Degree Discipline. The first row is highlighted in yellow and contains the following data: High School/GED or Grade Sc..., 101 High School Graduate, 31-MAY-1976, HD, and empty cells for the last two columns. Below the table, there are two instructions: 'Use down arrow to create multiple records' and 'Use scroll bar to view/add discipline information'.

Delete?	School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
<input type="checkbox"/>	High School/GED or Grade Sc...	101 High School Graduate	31-MAY-1976	HD		
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

- 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**.

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Changing Assignment Information

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

ACT Main Form

Document Reason	RECLASSIFICATION	Document Number	190982
Effective Date	14-MAY-2006	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Roberts, Julia	Gender	Female
Identification Number	1009567	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	17-JUN-2002	Total Annual Salary	20,555.00
Date of Birth	05-AUG-1978	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1009567	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	310008400 Comprehensive
Job	GG201N2.Office Svc SpecII	Position	310008400.20801.060122
FTE	1	Primary	Y
Assignment Salary	20,555.00	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 << < > >> *

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.

General Assignment Information

	Current	Proposed
Assignment Category	01 Regular FT	
Status	Active Assignment	
Expected Return Date		
Organization	310008400 Comprehensive Cancel	
Location	Bham Main Campus	
Position	310008400.20801.060122	
Job	GG201N2.OFFICE SVC SPECII	
Grade	W. G07	
Payroll Group	Staff 12	
Timecard Dist Number		
Timekeeping Method	TEL	
Timekeeping Organization		
Comments		

Salary Labor Sources Element Entries Return to Previous Form Save

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

The screenshot shows a form titled "General Assignment Information" with two columns: "Current" and "Proposed". The "Current" column contains the following data:

Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	310008400 Comprehensive Cance
Location	Bham Main Campus
Position	310008400.20801.060122
Job	CG201N2.OFFICE SVC SPECII
Grade	W.G07
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Comments	

The "Proposed" column is currently empty. At the bottom of the form, there are buttons for "Salary", "Labor Sources", "Element Entries", "Return to Previous Form", and "Save".

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

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

This screenshot is similar to the previous one, but with a red box around the "Position" field in the "Current" column containing "310008400.20801.060122". A red arrow points from this box to the "Position" field in the "Proposed" column, which contains "31008400.20801".

- After entering the **first two segments** of the **Current Position String**, click in the **JOB** field.
- The following window will open.

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Name	Job
310008400.20801.060501	CG204N1.Office Assoc I
310008400.20801.060122	CG201N2.Office Svc Spec II

Note: Two position strings will display; the current position string and Job title; as well as, the new 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.

Proposed
310008400 Comprehensive Cance
Bham Main Campus
310008400.20801.060501
CG204N1.Office Assoc I
W.G08

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.

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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.

Use the down arrow to create multiple records.

Assignment Salary	20,555.00	
Assignment Rate Pay	9.84	
FTE	1.00	
Hosp Calc Code		
Premium Plan	NA	NA
Salary Basis	Hourly	HOURLY
Payroll	Biweekly	Biweekly
Outside Income Source		
Outside Income	0.00	
CFB Code		(Annual)
Comments		

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

Component Reasons

Reason	Change Value	Change %

Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

Component Reason

Find: Reclassification%

Component Reason

- Reclassification

Proposed

NA
HOURLY
Biweekly
(Annual)

Find OK Cancel Return to Previous Form Save

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.

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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**.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	02-OCT-2005	3100127.000.213100127.311250000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	07-MAY-2006		224049	03.02	1524049	10	60.00
<input type="checkbox"/>	<input type="checkbox"/>	07-MAY-2006	3100127.000.213100127.311250000					40.00

Total LD % 100.00

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.

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- 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.

Note: For the hospital, this will be 70. For the university, this will be 10.

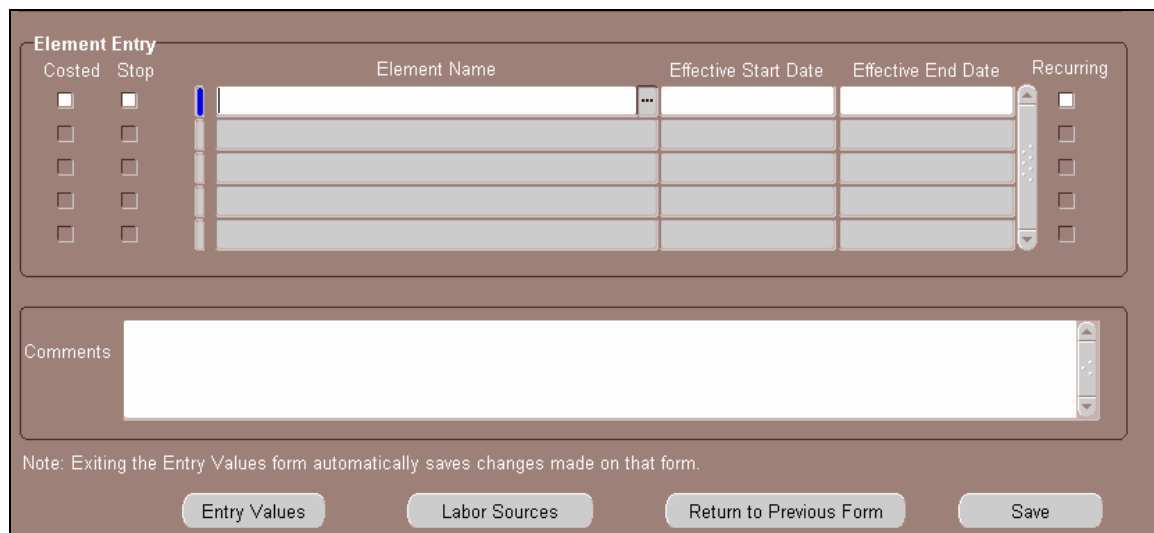
- e. Type in the **percent of the employee's effort** to be charged to the project number in the % field.

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.

Changing Element Entries

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**.



Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<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

Note: Exiting the Entry Values form automatically saves changes made on that form.

Entry Values Labor Sources Return to Previous Form Save

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.

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

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	FIP- Separate Pay	07-MAY-2006	13-MAY-2006	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

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

Entry Values (FIP- Separate Pay)

Pay Value	<input type="text"/>
Amount	<input type="text"/>
Jurisdiction	<input type="text"/>
Tax Separately	No
Deduction Processing	All Deductions
Separate Check	<input type="text"/>
Future 1	<input type="text"/>
Future 2	<input type="text"/>
Document	<input type="text"/>
Further Entry Information	<input type="text"/>
Date Earned	<input type="text"/>
Payee Details	<input type="text"/>
Processing Priority	2500

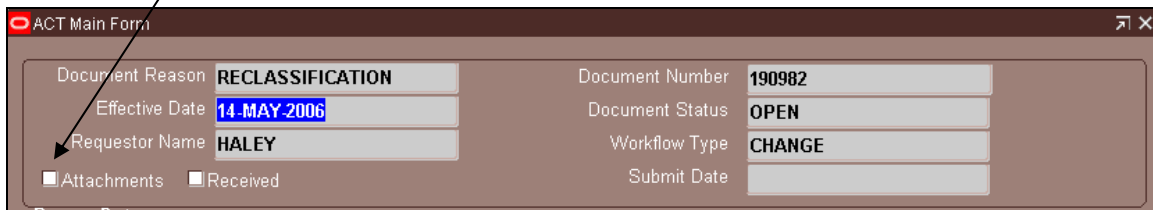
Note: Exiting this screen automatically saves changes made here.

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- 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 top 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

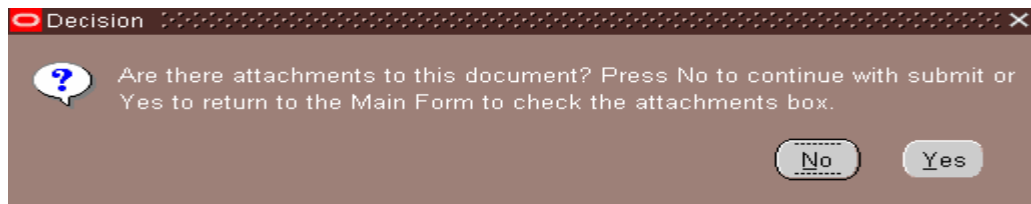
1. Click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. [Click here](#) for a listing of attachments required by Records Administration.



The screenshot shows the 'ACT Main Form' window with the following fields:

Document Reason	RECLASSIFICATION	Document Number	190982
Effective Date	14-MAY-2006	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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.



The screenshot shows a 'Decision' dialog box with the following text:

Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.

Buttons: No, Yes

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](#)