

Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

The **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason is used when an employee is transferring to a **different** organization.

The Employee could be transferring with the same job classification or a different job classification, but the pay grade of both job classifications **must remain the same**. If the new job classification is a **higher pay grade** than the employee's current pay grade, use the **Transfer with Promotion** document reason.

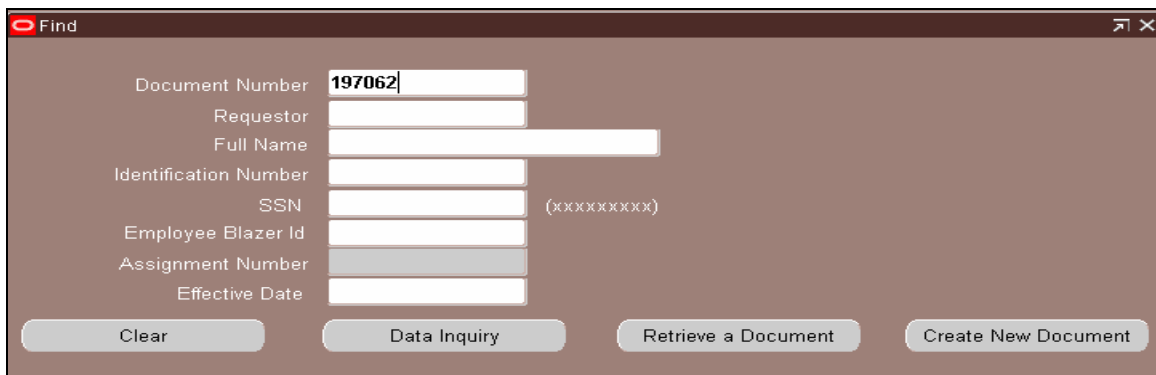
Note: *The current organization creates the document and **reassigns** the document to the new organizations Requestor. The new Requestor should be able to locate the document by reviewing the list of documents for their requestor name, by the document number or the employee's name, identification number, or Social Security Number. For instructions on how to **reassign** ACT documents, [click here](#).*

Also used when a faculty member is transferring to another organization where **no promotion** is associated with the change; or transferring to a staff position within a different organization. May or may not involve a salary change.

The new organization requestor should complete the following forms: **ADDRESS/PHONE** (campus information only), **ASSIGNMENT**, **SALARY**, **ELEMENT ENTRIES** and **LABOR SOURCE**.

UAB HR Officer → HR Transactions → ACT → Find Window

1. Use the **FIND WINDOW** to locate the reassigned document.



2. Click on the **RETRIEVE A DOCUMENT** button.
3. The **ACT MAIN FORM** opens.
4. If the employee's personal information **will not** be changing, [click here](#). To make changes in the employee's personal information, proceed onto **Step #5**.

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Changing Personal Data

5. 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 **ADDRESS (CAMPUS ONLY)** and **SCHOOLS AND COLLEGES** button.

The screenshot shows the 'ACT Main Form' window. The top section contains document details: Document Reason (TRANSFER LATERAL/DIFFE), Effective Date (04 JUN 2006), Requestor Name (HALEY), Document Number (197062), Document Status (OPEN), Workflow Type (CHANGE), and Submit Date. Below this is the 'Person Data' section with fields for Name (Thomas, Barry J.), Gender (Male), Identification Number (1026634), Ethnic Origin (White / Non Hispanic), SSN, Total Active Assignments (1), Latest Hire Date (01-MAR-2004), Total Annual Salary (28,665.00), and Date of Birth (16-JUL-1966). The 'Assignment Data' section includes Assignment Number (1026634), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (311402200 Med - Hematolog), Job (RL112E0.Research Assistan), Position (311402200.24004.031001), FTE (1), Primary (Y), Assignment Salary (28,665.00), and Payroll (Monthly). At the bottom, there are tabs for Person, Address, Assignment, Salary, Element Entries, and Labor Sources. A red circle highlights the 'Person Data' button in the bottom navigation bar.

- 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.

The screenshot shows the 'Employment' tab selected. It features two columns: 'Current' and 'Proposed'. The 'Current' column has the following values: Ethnic Origin (White / Non Hispanic), Veteran Status (blank), I-9 Status (Yes), Visa Type (blank), and Work Visa Expiration Date (blank). The 'Proposed' column has corresponding empty input fields for each of these categories.

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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.

The screenshot shows the 'Directory' tab selected. The form is divided into two columns: 'Current' and 'Proposed'. The 'Current' column has four rows: 'Alpha List' with a dropdown set to 'Yes', 'Online List' with a dropdown set to 'Yes', 'Directory Title' with an empty text box, and 'Directory Name' with an empty text box. The 'Proposed' column has four rows: the first is a dropdown menu with a '...' button, the second is a greyed-out text box, the third is an empty text box, and the fourth is an empty text box.

- 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

The screenshot shows the 'License' tab selected. The form is titled 'License/Certificate/Membership Information' and is divided into 'Current' and 'Proposed' columns. The 'Current' column has four rows: 'Type' with an empty dropdown, 'Title' with an empty text box, 'Number' with an empty text box, and 'Expiration Date' with an empty text box. The 'Proposed' column has four rows: the first is a dropdown menu with a '...' button, the second is a greyed-out text box, the third is an empty text box, and the fourth is an empty text box. Below the form, it says '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.

The screenshot shows the 'Termination' tab selected. The form is divided into 'Current' and 'Proposed' columns. The 'Current' column has five rows: 'Actual Date' with an empty text box, 'Projected Last Day of Work' with an empty text box, 'Leaving Reason' with an empty text box, 'Rehire Recommendation' with an empty text box, and 'Recommendation Reason' with an empty text box. The 'Proposed' column has five rows: the first is an empty text box, the second is a dropdown menu with a '...' button, the third is a greyed-out text box, the fourth is an empty text box, and the fifth is an empty text box.

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6. If the employee's **campus addresses and/or campus 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 displays the 'ACT MAIN FORM' interface. At the top, there are tabs for 'Personal', 'Employment', 'Directory', 'License', and 'Termination'. Below these tabs, the form is divided into two columns: 'Current' and 'Proposed'. The 'Current' column contains five input fields: 'Actual Date', 'Projected Last Day of Work', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. The 'Proposed' column contains five corresponding input fields. Below the input fields is a 'Comments' text area. At the bottom of the form, there are four buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'. The 'Address' button is circled in red.

- a. For Instructions on entering or changing address and phone information, [click here.](#)
7. If the employee's **educational information** is changing, click on the **SCHOOLS AND COLLEGES** button located on the bottom of the **PERSON DATA** form.

This screenshot is identical to the one above, showing the 'ACT MAIN FORM' interface. The 'Address' button is no longer circled, and the 'Schools and Colleges' button is circled in red.

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

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Schools and Colleges Attended				Faculty/Instructor Information		
Delete?	School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
<input type="checkbox"/>	University of North Alabama	460 Bachelor of Science or Mathe	01-MAY-1988	HD		
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Use down arrow to create multiple records Use scroll bar to view/add discipline information

- c. 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**.

ACT Main Form

Document Reason: TRANSFER LATERAL/DIFFE	Document Number: 197062
Effective Date: 04-JUN-2006	Document Status: OPEN
Requestor Name: HALEY	Workflow Type: CHANGE
<input type="checkbox"/> Attachments <input type="checkbox"/> Received	Submit Date: <input type="text"/>

Person Data

Name: Thomas, Barry J.	Gender: Male
Identification Number: 1026634	Ethnic Origin: White / Non Hispanic
SSN: <input type="text"/>	Total Active Assignments: 1
Latest Hire Date: 01-MAR-2004	Total Annual Salary: 28,665.00
Date of Birth: 16-JUL-1966	<input type="checkbox"/> Prior UAB Service

Assignment Data

Assignment Number: 1026634	Assignment Status: Active Assignment
Assignment Category: 01 Regular FT	Organization: 311402200 Med - Hematolog
Job: RL112E0.Research Assistan	Position: 311402200.24004.031001
FTE: 1	Primary: Y
Assignment Salary: 28,665.00	Payroll: Monthly

Person Address Assignment Salary Element Entries Labor Sources

Comments:

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 **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.

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General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		
Expected Return Date			
Organization	311402200 Med - Hematology & O		
Location	Bham Main Campus		
Position	311402200.24004.031001		
Job	RL112E0.Research Assistant		
Grade	W.R42		
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Comments			

- The **ORGANIZATION**, **LOCATION** and **POSITION** fields are required fields when using the **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.
- Click in the **POSITION** field and select the *appropriate position code* from the LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. The selection of position code populates the **ORGANIZATION**, **LOCATION**, **JOB** and **GRADE** fields.

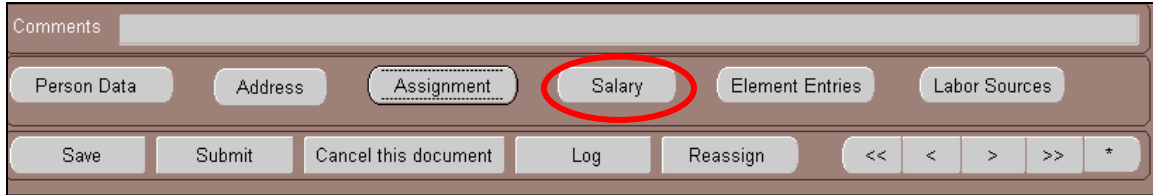
General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		01 Regular FT
Status	Active Assignment		
Expected Return Date			
Organization	311402200 Med - Hematology & O		392200000 Microbiology
Location	Bham Main Campus		Bham Main Campus
Position	311402200.24004.031001		392200000.20601.031001
Job	RL112E0.Research Assistant		RL112E0.Research Assistant
Grade	W.R42		W.R42
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Comments			

- The **PAYROLL GROUP** and all three **TIMEKEEPING** fields are available for change or update if necessary.
- Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
- Click on the **SAVE** button.
- 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.

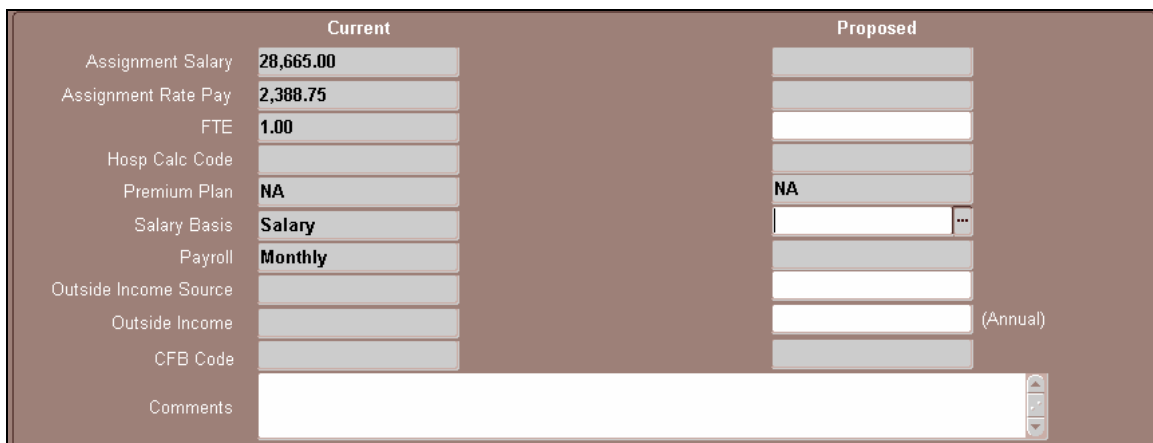


Comments

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

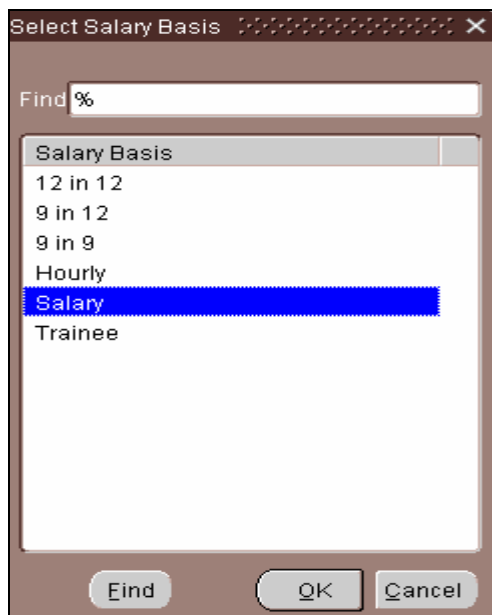
Save Submit Cancel this document Log Reassign << < > >> *

2. Click in the Salary Basis field.



	Current	Proposed
Assignment Salary	28,665.00	
Assignment Rate Pay	2,388.75	
FTE	1.00	
Hosp Calc Code		
Premium Plan	NA	NA
Salary Basis	Salary	<input type="text"/>
Payroll	Monthly	
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments	<input type="text"/>	

3. Use the LOV to enter the correct **SALARY BASIS** information or type it in. This field will vary based on other field information such as **Organization** and **Position**. Click **OK**.



Select Salary Basis X

Find %

Salary Basis

- 12 in 12
- 9 in 12
- 9 in 9
- Hourly
- Salary**
- Trainee

Find OK Cancel

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- Click in the **REASONS** field located at the top of the form, select **TRANSFER ADJUSTMENT** from the LOV.

The screenshot shows the 'Component Reasons' section of the ACT form. At the top, there are fields for 'Reason', 'Change Value', and 'Change %'. Below these is a dropdown menu for 'Component Reason' with a search box containing 'Transfer Adjustment%'. The dropdown list is open, showing 'Transfer Adjustment' as the selected option. To the left of the dropdown, there is a 'Current' section with various fields: Assignment Salary (28,665.00), Assignment Rate Pay (2,388.75), FTE (1.00), Hosp Calc Code, Premium Plan (NA), Salary Basis (Salary), Payroll (Monthly), Outside Income Source, Outside Income, CFB Code, and Comments.

- 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 if necessary. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.
- 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.
- Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
- Click on the **RETURN TO PREVIOUS FORM** button.

Changing Labor Source Information (General Ledger)

- 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**.

The screenshot shows the bottom navigation bar of the ACT form. It contains several buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. The 'Labor Sources' button is circled in red. Below these buttons are 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign' buttons, followed by navigation arrows and a '*' button.

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Assignment Salary **28,665.00** 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-MAY-2006	28-FEB-2007		301095	10.02	2001865	10	50.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAY-2006	31-MAR-2007		301354	50.02	2001976	10	50.00
<input type="checkbox"/>	<input type="checkbox"/>	04-JUN-2006	31-JAN-2007		300934	10.02	2001900	10	100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: 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.
 - a. Click on the **GL CODE** LOV. This opens the **UAB_AKF FIND** window.
 - b. 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.
 - c. Click in the **OBJECT** field and enter **Zero (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.
 - d. 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.

 - e. 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.
 - f. 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.
 - g. 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.

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- 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**.

Element Entry

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

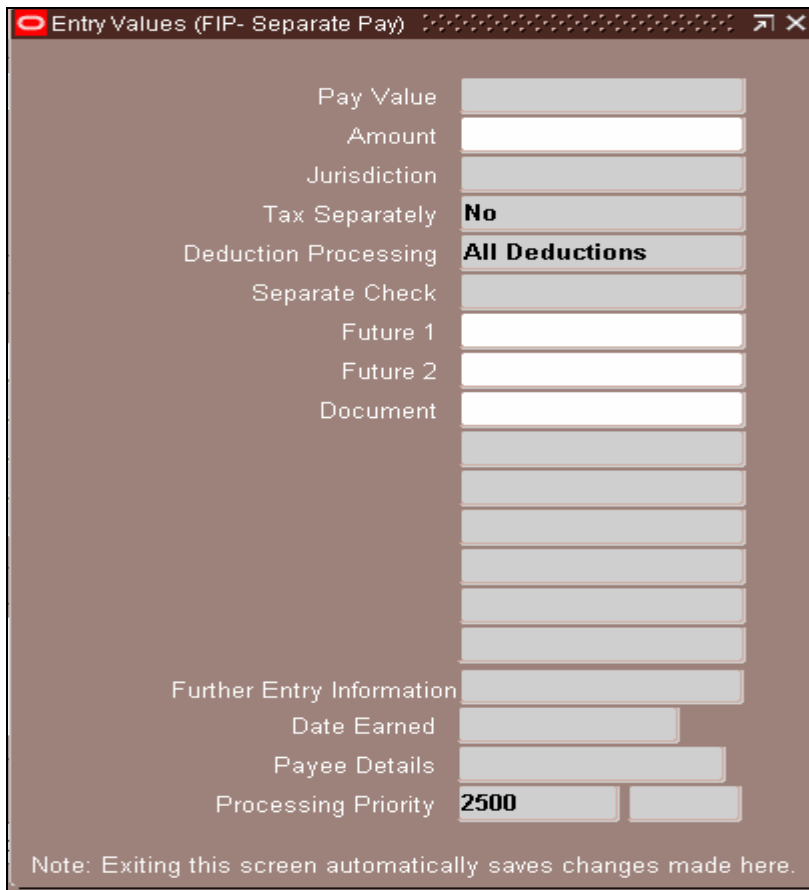
2. Click inside the **ELEMENT NAME** field; select the element name from the LOV or **type in the appropriate element name** in the field.

Element Entry

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Retention Sep Pay	04-JUN-2006	10-JUN-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"/>

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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.



Entry Values (FIP- Separate Pay)

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

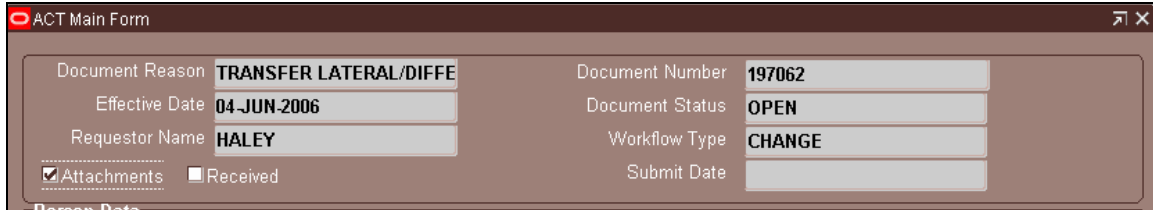
Note: Exiting this screen automatically saves changes made here.

- a. Enter the information in the applicable fields. The element will determine the fields that open on this form.
 - b. 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**.

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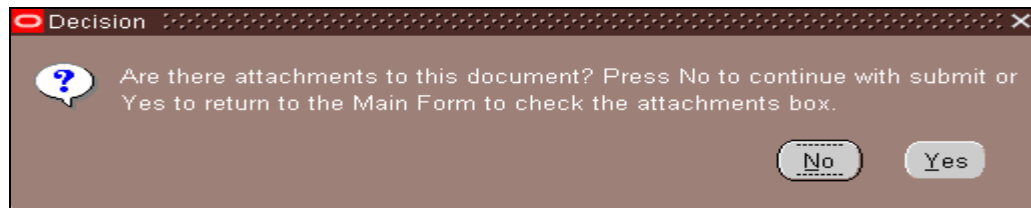
Submitting the Document

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. It contains several input fields and checkboxes. The 'Document Reason' is 'TRANSFER LATERAL/DIFFE', 'Effective Date' is '04 JUN 2006', 'Requestor Name' is 'HALEY', 'Document Number' is '197062', 'Document Status' is 'OPEN', 'Workflow Type' is 'CHANGE', and 'Submit Date' is empty. There are checkboxes for 'Attachments' (checked) and 'Received' (unchecked).

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 a question mark icon. The text inside reads: '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.' There are two buttons: 'No' and '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](#)