Appoint, Change and Terminate (ACT) Documentation

Probationary Increase

The **Probationary Increase** document reason is used to process a salary increase for an employee after completion of the initial six (6) months (probationary period) of employment with the University. A probationary increase is given at the discretion of the employee's department according to departmental policies.

A **Probationary Increase** document usually requires changing the salary information only. However, the **Labor Sources** form is available for change or update.

- When changing an employee’s **Labor Source** information on a **Probationary Increase** document, the effective date of the **Probationary Increase** document **must be a future pay period**.
- When processing a **Probationary Increase** document with a retroactive 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 **Probationary Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Probationary Increase** document.
- Once an employee’s **Probationary Increase** document has entered “**COMPLETE**”, a **Funding Source Change Document with** an effective date prior to the **Probationary Increase** may not be created.

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**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 words **Probationary Increase** 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. 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 the beginning of a pay period. The Document Effective Date for all monthly paid employees must be the beginning of the month.

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

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.

9. Select **PROBATIONARY INCREASE** from the LOV or type the information in the **REASON** field. Click **OK**.
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.

11. The **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered based upon the new rate of pay.

12. If processing a **Probationary Increase** document for a **UAB Hospital** employee, click in the **HOSP CALC CODE** field and select **B** from the listing.

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 **Probationary Increase** document, click here.

17. If the employee’s Labor Source information must be changed proceed onto **Changing Labor Source Information**.
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.

The LABOR SOURCES form opens.
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.

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

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

4. Enter the **new funding source account number** or use LOV to locate the correct account number.
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**Note:** When using the ALIAS LOV, use the % WILD CARD to perform a search. Enter as much information as possible to limit your search.

5. Once the new account number is entered, click on the OK button. The UAB_AKF window will open displaying the account string.

6. Type “0” zero in the **OBJECT** field. Click **OK**.

7. 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.

- 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.

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.

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

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

22. Enter comments, if applicable, in the COMMENTS field at the bottom of this form. Comments entered here will appear on the ACT MAIN FORM.
23. Click on the SAVE button.

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

**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.

   ![Decision Window](image)

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 Probationary 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.