

Appoint, Change and Terminate (ACT Documentation) Promotion Same Department

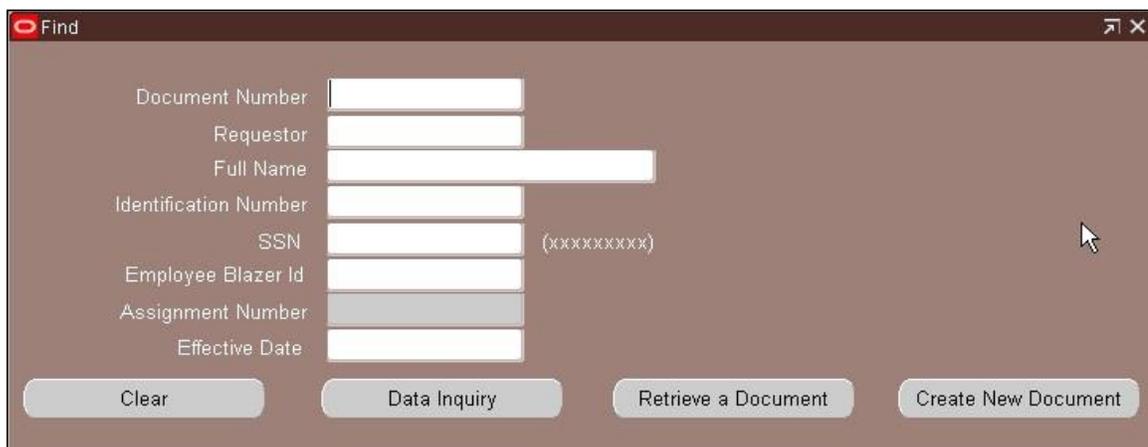
The **PROMOTION SAME DEPARTMENT** Document Reason is used when an employee changes to a job classification that is a **higher pay grade** than their current job classification **within the same department**. The **position number, job title** and **job grade must** change using this document reason. If the position number is not changing, use the **RECLASSIFICATION** document reason. For instructions on creating a **RECLASSIFICATION** document, [click here](#).

Used when a Faculty member is promoted in faculty rank in the same organization or when Staff is promoted to Full-time Faculty.

The **ASSIGNMENT, SALARY, 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.

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.

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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]

4. Use the **DOCUMENT REASON** LOV to choose or type the words **Promotion Same Department** in the **DOCUMENT REASON** field.

Document Reason

Find %

Doc_Reason	Doc_Type
NONRECURRING ELEMENT	ELEMENTS
OJI LEAVE WITH PAY	LEAVES
OJI LEAVE WITHOUT PAY	LEAVES
OJIFAMILY MEDICAL LEAVE	LEAVES
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

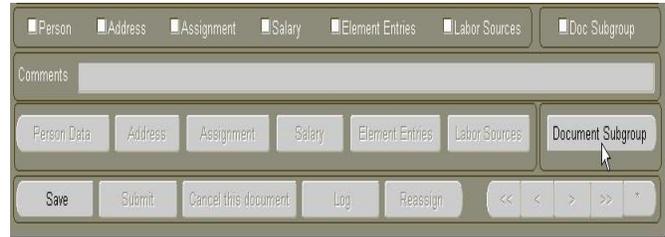
Find OK Cancel

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 promotion same department 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. To view biweekly and monthly payroll schedules go to Financial Affairs webpage. [Click here](#)*

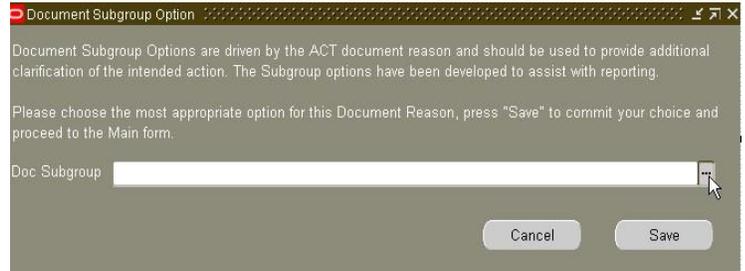
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- Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.



The screenshot shows the ACT MAIN FORM interface. At the top, there are tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the tabs is a Comments field. A row of buttons includes Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The Document Subgroup button is highlighted with a mouse cursor. At the bottom, there are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

- The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc SUBGROUP** field **LOV**.



The screenshot shows the Document Subgroup Option window. It contains the following text: "Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting. Please choose the most appropriate option for this Document Reason, press 'Save' to commit your choice and proceed to the Main form." Below the text is a Doc Subgroup field with a dropdown arrow. At the bottom are Cancel and Save buttons.

- Select the description that best explains the nature of the transaction.

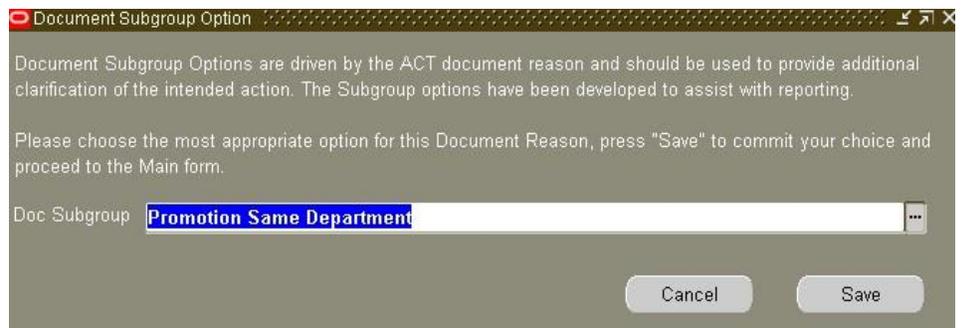
For a complete list of available **DOCUMENT SUBGROUP DESCRIPTIONS** and explanation of when to use, [Click here](#).



The screenshot shows the Document Subgroup LOV window. It has a Find % field at the top. Below it is a list of descriptions: "Faculty--from Staff", "Hire into a Recruited Position", and "Promotion Same Department". The "Promotion Same Department" option is highlighted in blue. A large box in the center of the list says "SAMPLE LISTING ONLY". At the bottom are Find, OK, and Cancel buttons.

- Click on **OK** to select.

- Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.



The screenshot shows the Document Subgroup Option window with the Doc Subgroup field now containing "Promotion Same Department". The text and instructions are the same as in the previous screenshot. The Save button is highlighted.

Warning: If you change the **DOC SUBGROUP** field after the initial save in step 10, **you must re-save in order to commit your change.**

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

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12. If the employee's personal information **will not** be changing, [click here](#).

Changing Personal Data

1. If **personal information** pertaining to the employee is changing, click on the **PERSON DATA** button. Most tabs and fields (except for the **PERSONAL** tab) will be available for change or update when using a **current** or **future** document effective date. Limited tabs and fields will be available when using a **retroactive** document effective date.

The screenshot shows the top navigation bar of the ACT system with tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the navigation bar is a 'Comments' field. A row of buttons includes 'Person Data' (circled in red), 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign', along with navigation arrows.

- 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. The form is divided into 'Current' and 'Proposed' columns. Under 'Current', the following fields are visible: Ethnic Origin (White), Veteran Status, I-9 Status (Yes), Visa Type, and Work Visa Expiration Date. The 'Proposed' column contains empty input fields for the same information. At the bottom, there are buttons for 'Address', 'Return to Previous Form', and 'Save', along with a 'Comments' field.

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

The screenshot shows the 'Phonebook' tab selected. The form is titled 'Data used for the UAB Electronic Directory' and is divided into 'Current' and 'Proposed' columns. Under 'Current', the following fields are visible: Individual Online List (Yes), Online Job Title, Online Display Name, and Faculty and Staff List (Yes). The 'Proposed' column contains empty input fields for the same information. At the bottom, there are buttons for 'Address', 'Return to Previous Form', and 'Save', along with a 'Comments' field. A note on the right side of the form reads: 'Please enter Job Title (Last Name, First Name) *** Please do not add suffix'.

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- 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 interface. It has a header with tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The main area is titled 'License/Certificate/Membership Information'. It is divided into two columns: 'Current' and 'Proposed'. Under 'Current', there are input fields for 'Type', 'Title', 'Number', and 'Expiration Date'. Under 'Proposed', there are corresponding empty input fields. A note below the 'Proposed' fields says 'Use down arrow to create multiple records.' At the bottom, there is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

- 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 interface. It has a header with tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The main area is titled 'License/Certificate/Membership Information'. It is divided into two columns: 'Current' and 'Proposed'. Under 'Current', there are input fields for 'Actual Date', 'Projected Last Day', 'Leaving Reason', 'Retire Recommendation' (with a 'Yes' value), and 'Recommendation Reason'. Under 'Proposed', there are corresponding empty input fields. At the bottom, there is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

2. Click on the **SCHOOLS AND COLLEGES** tab.

The screenshot shows the 'Schools and Colleges' tab interface. It has a header with tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The main area contains a table with the following columns: '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 text: 'University of Alabama at Birmingham', '300 Non-Medical Certificate', '01-JAN-1994', 'HD', and empty cells for the last two columns. Below the table is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	300 Non-Medical Certificate	01-JAN-1994	HD		

- a. If Schools and Colleges information displays and is **accurate**, click on the **SAVE** button located at the bottom of the form.

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- b. If Schools and Colleges information is ***not accurate***, you may:
- Overwrite the existing information.
 - Enter additional School or College's, Degree Names, Degree Types by choosing the **Country** and clicking on the next available line.
 - Enter Transcript and Degree Discipline information as required.
3. Click the **SAVE** button and click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.
4. 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.

Address

	Current	End Date Current	Proposed
Address Type	Campus Primary	<input type="checkbox"/>	Campus Primary
Building	HHB		
Room	415		
Address Line3	HERITAGE HALL		
City	Birmingham		
State	AL		
Zip Code	35294 - 1152		

Use the down arrow to view multiple records

Phones

	Delete Current	Type	Phone Number (xxxxxxxx)	Date From
	<input type="checkbox"/>	Home	(205) 934-2339	24-DEC-2007
	<input type="checkbox"/>	Campus Primary	(205) 934-2339	24-DEC-2007
	<input type="checkbox"/>	Work Fax	(205) 975-5712	24-DEC-2007

Use the down arrow to create multiple records

International Address:

Comments

Return to Previous Form
Save

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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**.

General Assignment Information		Current	Proposed
Assignment Category		04 Irregular	
Status		Active Assignment	
Expected Return Date			
Organization		114402000 Temporary Services	
Location		Bham Main Campus	
Position		114402000.50199.130901.	
Job		ZT200N1.Temp Specialist Campus	
Grade		W.T00	
Payroll Group		Staff 12	
Timecard Dist Number			
Timekeeping Method		TEL	
Timekeeping Organization			
Supervisor Name			
Supervisor Assignment #			
Comments			

Return to Previous Form Save

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 **PROMOTION SAME DEPARTMENT** document reason.
3. The **POSITION** and **JOB** fields are required fields when using the **PROMOTION SAME DEPARTMENT** document reason.

4. 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		112402000 Project Management S	090000000 Athletics Department A
Location		Bham Main Campus	Bham Main Campus
Position		112402000.21501.110925	090000000.00104.080901
Job		CG204N1.Office Assoc I	FF201E1.Business Officer I
Grade		W.G09	W.G15
Payroll Group		Staff 12	
Timecard Dist Number			
Timekeeping Method		TEL	
Timekeeping Organization			
Supervisor Name			
Supervisor Assignment #			
Comments			

Return to Previous Form Save

5. The **PAYROLL GROUP** and all three **TIMEKEEPING** fields are available for change or update if necessary.
6. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.

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General Assignment Information		Current	Proposed
Assignment Category	<input type="text"/>		04 Irregular
Status	<input type="text"/>		Active Assignment
Expected Return Date	<input type="text"/>		
Organization	<input type="text"/>		340000000 School of Nursing Dear
Location	<input type="text"/>		Bham Main Campus
Position	<input type="text"/>		340000000.00206.110615
Job	<input type="text"/>		FF217E3.Financial Officer III
Grade	<input type="text"/>		W.G18
Payroll Group	<input type="text"/>		Staff 12
Timecard Dist Number	<input type="text"/>		
Timekeeping Method	<input type="text"/>		
Timekeeping Organization	<input type="text"/>		
Supervisor Name	<input type="text"/>		
Supervisor Assignment #	<input type="text"/>		
Comments	<input style="width: 100%;" type="text"/>		

7. Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number. Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.

Supervisor Info X

Full_Name	Assignment_Number	Job_Name	Org_Name
Employee, Employee	1555555	HR812M0.MGR-PHYSICAL THERAPY	708400000 Rehabilitation Services
Employee, Testing 1	1555551	HR206E1.PHYSICAL THERAPIST	708400000 Rehabilitation Services
Employee, Relations	1555552	AA305N0.MEDICAL & DENTAL STAF...	708100000 Quality Resources
Employee, Sample 1	1555553	AC100N1.Admin Assoc	311401000 Med - Cardiovascular D

8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
9. Click on the **SAVE** button.
10. 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 the **ACT MAIN FORM**.
2. Click in the **PROPOSED SALARY BASIS** field if required.

Premium Plan	NA		
Salary Basis	Salary		...
Payroll	Monthly		

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**.
4. Click **OK**. The **PROPOSED SALARY BASIS** and **PAYROLL** fields will populate.

Salary Basis	Hourly	Salary	...
Payroll	Biweekly	MONTHLY	

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

The screenshot shows the 'Component Reasons' section of the ACT form. A list of reasons is displayed, with 'Promotion' selected. The 'Change Value' and 'Change %' fields are visible, along with a 'Proposed' section for entering salary information. The 'Change value = Difference in rate of pay.' note is also present.

6. 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.

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Component Reasons	Reason	Change Value	Change %	
	Promotion	250.00	4.07	Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

7. 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.
8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
9. 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 **ACT MAIN FORM**.

Costing										
Assignment		Element								
Current	Effective Date									
LD	Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAR-2006		2101046.000.123400000.349100000						100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006		3100127.000.213100127.311250000						100.00
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
										Total LD % 100.00

Comments:

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.**

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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.
 - a. 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.
 - b. 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. 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.

4. Type in the **percent of the employee's effort** to be charged to the project number in the **%** field. Total percent must equal 100%.
5. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.
6. 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.

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 a window titled "ACT Main Form" with the following fields and values:

Document Reason	PROMOTION SAME DEPAR	Document Number	536162
Effective Date	03-APR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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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**.

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