

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**.

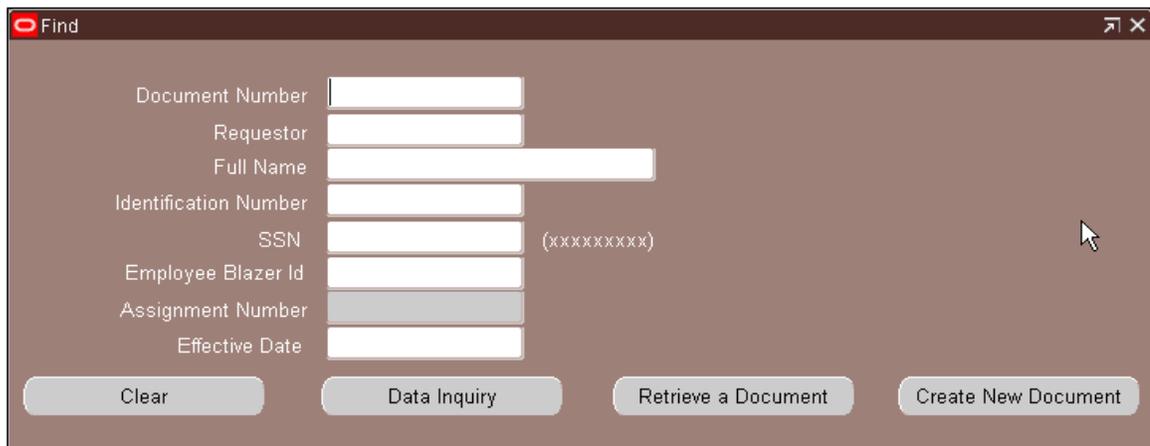
(Example of when the Reclassification document reason is used for Staff employees includes: Office Service Specialist II to Office Associate I or Clinical Research Nurse to Research Nurse Coordinator). (Example of when the Reclassification document reason is used for Faculty includes: Professor to Professor/Chairman,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

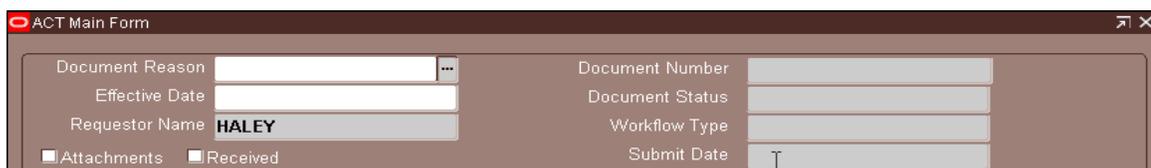
1. Use the **FIND WINDOW** to locate the employee.



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

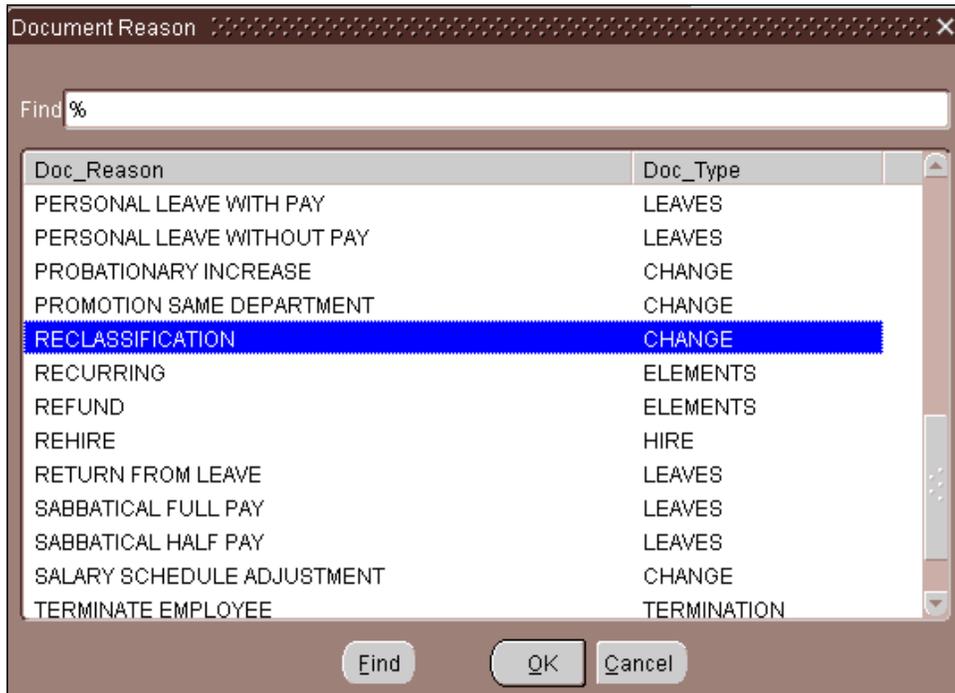
Note: *After you click on the Create New Document button you might see another window pop up. Some employees may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.*

3. The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.



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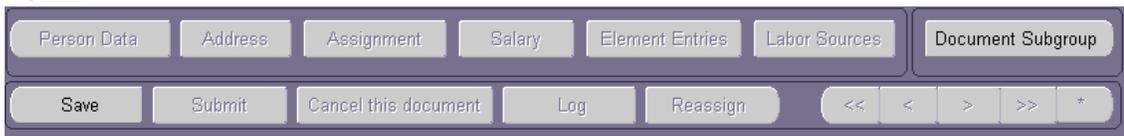
- Use the **DOCUMENT REASON** LOV to choose or type the word **Reclassification** in the **DOCUMENT REASON** field.



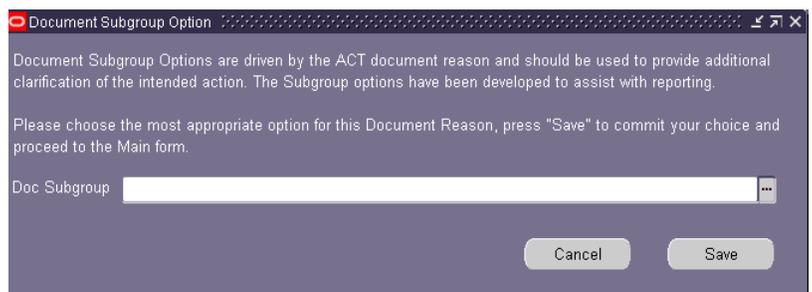
- Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date.

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

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



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



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8. Select the description which best explains the nature of the transaction.

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

9. Click on **OK** to select.

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

11. 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](#). To make changes in the employee's personal information, proceed onto **Step #13**.

Changing Personal Data

13. 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.

- a. 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.

- b. 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.

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

- a. If Schools and Colleges information displays and is **accurate**, click on the

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		

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SAVE button located at the bottom of the form.

- 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 clicking on the next available line.
 - Enter Transcript and Degree Discipline information as required.

15. Click the **SAVE** button and click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

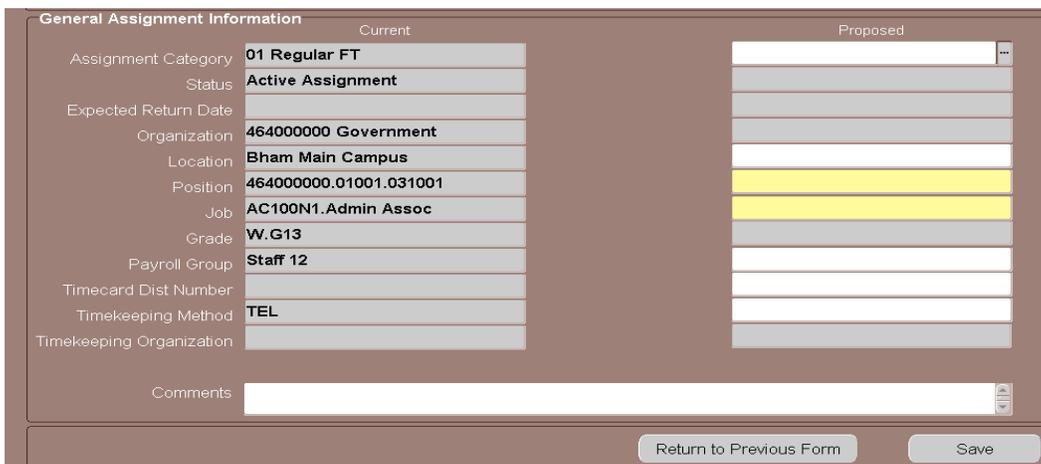
Changing Assignment Information

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



The screenshot shows the navigation bar of the ACT MAIN FORM. It includes several tabs: Person (checked), Address, Assignment (circled in red), Salary, Element Entries, Labor Sources, and Doc Subgroup (checked). Below the tabs is a 'Comments' field. At the bottom are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

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.



The screenshot shows the 'General Assignment Information' form. It is divided into 'Current' and 'Proposed' columns. The 'Current' column contains the following information:

Field	Current Value
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	464000000 Government
Location	Bham Main Campus
Position	464000000.01001.031001
Job	AC100N1.Admin Assoc
Grade	W.G13
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	

The 'Proposed' column is currently empty. At the bottom are buttons for 'Return to Previous Form' and 'Save'.

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

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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:

The screenshot shows a form titled "General Assignment Information" with two columns: "Current" and "Proposed".

Field	Current	Proposed
Assignment Category	01 Regular FT	
Status	Active Assignment	
Expected Return Date		
Organization	464000000 Government	
Location	Bham Main Campus	
Position	464000000.01001.031001	464000000.01001
Job	AC100N1.Admin Assoc	
Grade	W.G13	
Payroll Group	Staff 12	
Timecard Dist Number		
Timekeeping Method	TEL	
Timekeeping Organization		
Comments		

Buttons at the bottom: Return to Previous Form, Save

5. After entering the **first two segments** of the **Current Position String**, click in the **JOB** field.
6. The window similar to the one below will open.

The screenshot shows a search window titled "Position".

Find: 464000000.01001%

Name	Job
464000000.01001.031001	AC100N1.Admin Assoc
464000000.01001.110301	BC201N7.Budget Officer

Buttons at the bottom: End, OK, Cancel

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.

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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. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.

The screenshot shows a form titled "General Assignment Information" with two columns: "Current" and "Proposed". The "Current" column has fields for Assignment Category, Status, Expected Return Date, Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, Timekeeping Organization, Supervisor Name, and Supervisor Assignment #. The "Proposed" column has a dropdown menu for "Active Assignment" and several other fields, some of which are highlighted in yellow.

10. 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.

The screenshot shows a "Supervisor Info" window with a "Find %" search box and a table of supervisors. The table has columns for Full_Name, Assignment_Number, Job_Name, and Org_Name. Below the table are buttons for "Find", "OK", and "Cancel".

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

11. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
12. Click on the **SAVE** button.
13. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

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Changing Salary Information

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

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 table with two columns: 'Current' and 'Proposed'. The 'Current' column contains the following values: Projected Assignment Salary (34,840.00), Actual Assignment Rate of Pay (16.75), FTE (1.00), Hosp Calc Code, Premium Plan (NA), Salary Basis (Hourly), Payroll (Biweekly), Outside Income Source, Outside Income (0.00), and CFB Code. The 'Proposed' column is mostly empty, with 'NA' in the Premium Plan row. At the bottom of the form, there are buttons for 'Return to Previous Form' and 'Save'.

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

- 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.

This screenshot is similar to the first one, but with a dropdown menu open over the 'Reason' field. The dropdown menu is titled 'Component Reason' and shows a search bar with 'Reclassification%' entered. Below the search bar, 'Reclassification' is listed and highlighted in blue. The 'Current' and 'Proposed' salary information is visible in the background, matching the first screenshot.

When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.

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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**.

Current LD	Stop	Effective Date From Date	To 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
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Assignment Salary: 41,110.00 Element Name: [Dropdown]

Costing

Assignment Element

Current Effective Date

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.

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

- j. 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.

- k. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.
- l. 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 a close button in the top right corner. The form contains the following fields and values:

Document Reason	RECLASSIFICATION	Document Number	536177
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	

An arrow points from the "ATTACHMENTS" checkbox in the screenshot to the "ATTACHMENTS" checkbox in the text above.

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.

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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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