Appoint, Change and Terminate (ACT) Documentation

Salary Schedule Adjustment

The **SALARY SCHEDULE ADJUSTMENT** document reason is used only when a fluctuation (either up or down) in salary occurs for an employee, trainee or student.
If changing assignment related data, use PROMOTION SAME DEPARTMENT, TRANSFER LATERAL/SAME DEPARTMENT or TRANSFER WITH PROMOTION document reason.

When using the **SALARY SCHEDULE ADJUSTMENT** document reason, the **SALARY,** and **LABOR SOURCE** forms are available for update. **PERSON DATA, ADDRESS**, and **ASSIGNMENT** fields are available for ***viewing only***.

UAB HR Officer → HR Transactions → ACT → Find Window

The use of the **SALARY SCHEDULE ADJUSTMENT** document reason is limited to the situations listed below:

Faculty:

- Used when a faculty member has a fluctuation either up or down in salary or there is a change in payroll group. Presently used for the following:
- Adding/deleting an officially approved and appointed administrative assignment for a faculty member that requires an increase/decrease in salary and/or change in payroll.
- Change in payroll from 9/9 to 9/12 or vice versa. All changes from or to 9/9 and 9/12 must be effective at the beginning of the contract year on August 15. Any other effective date requires prior approval by the Provost's office.
- Shifts between UAB and HSF/VA or any other external salary source and UAB.
- Change in FTE with associated change in salary.
- Decrement in salary or removal of an administrative appointment that does not affect the assignment.

Staff:

- To adjust an employee's salary to the minimum amount of his/her pay grade range.
- To give a Hospital pool differential increase to a Hospital employee
- To increase or decrease an FTE for a monthly paid employee
- To make salary changes for a student assistant, graduate assistant, or post-doc.

***Note:* An *increase* in salary due to merit, equity, retention, additional duties/responsibilities, job rate plan increases other than Oct 1 or step increases other than Oct 1 *cannot* to be processed using the SALARY SCHEDULE ADJUSTMENT document reason. If a salary increase situation does not seem to fit into any of the available document reasons (Merit, Equity or Probationary Increase) contact Compensation.**

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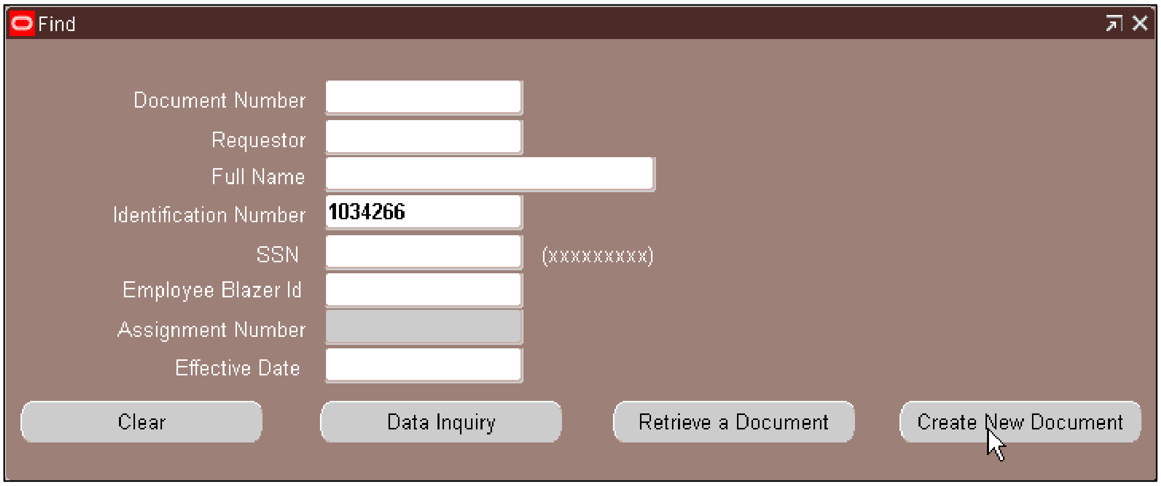
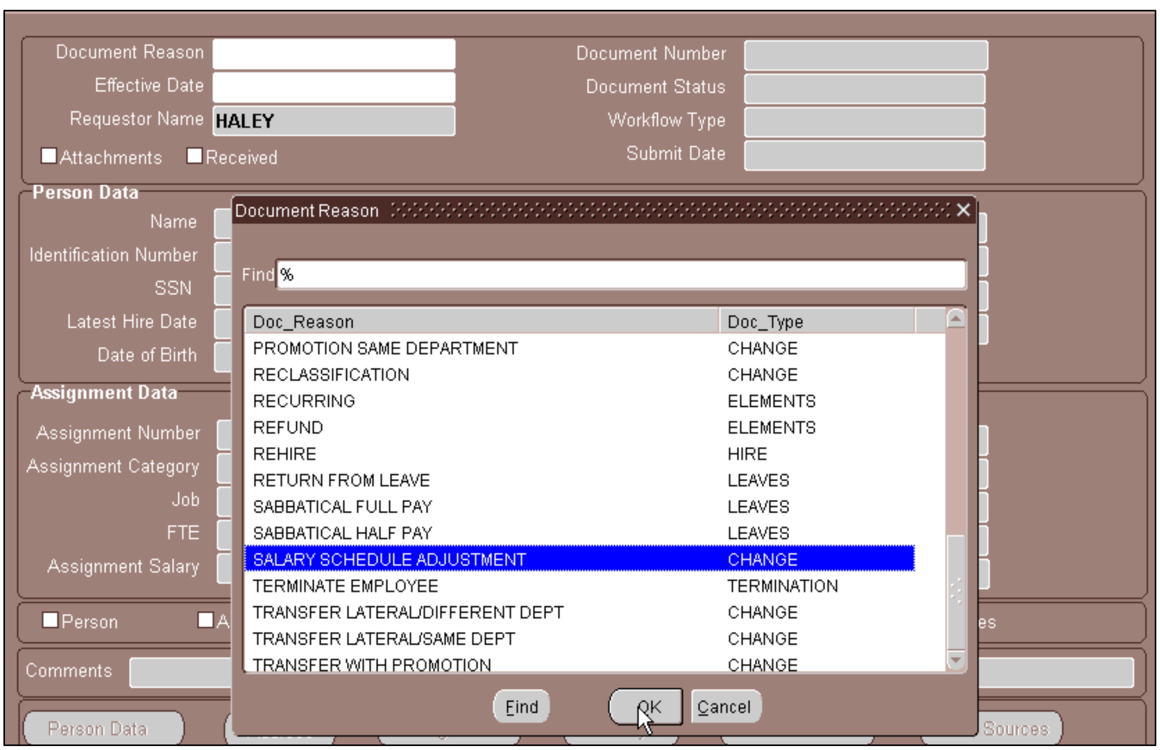
Salary Schedule Adjustment

1. Use the **FIND WINDOW** to locate the employee. Click on the **CREATE NEW DOCUMENT** button.



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

2. When the new document opens, click once in the **DOCUMENT REASON** field; use the **DOCUMENT REASON LOV** to choose **SALARY SCHEDULE ADJUSTMENT** or type the words ***Salary Schedule Adjustment*** in the **DOCUMENT REASON** field.



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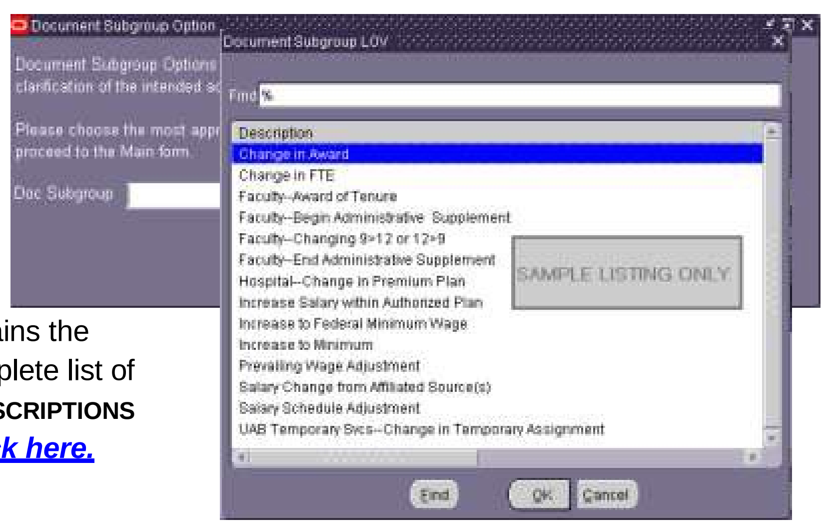
3. Click inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date. Remember to use the **DD-MM-YYYY** date format.

Note: ***The Document Effective Date for all bi-weekly paid employees receiving a Salary Schedule Adjustment 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.***

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

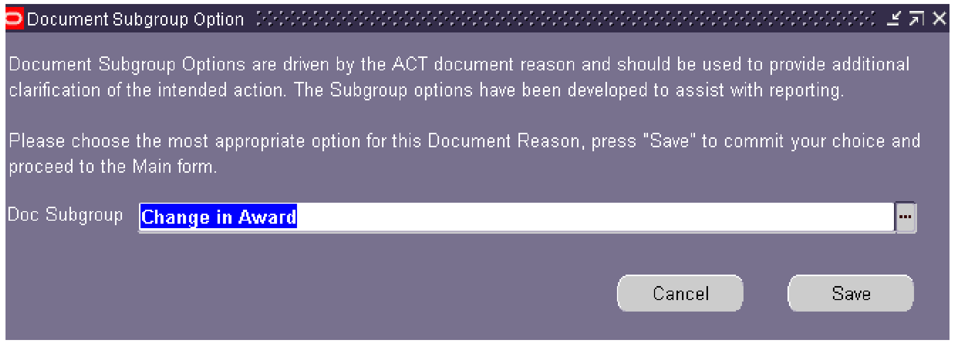
5. The **DOCUMENT SUBGROUP OPTION** window will open; click on **DOC SUBGROUP** field **LOV**.



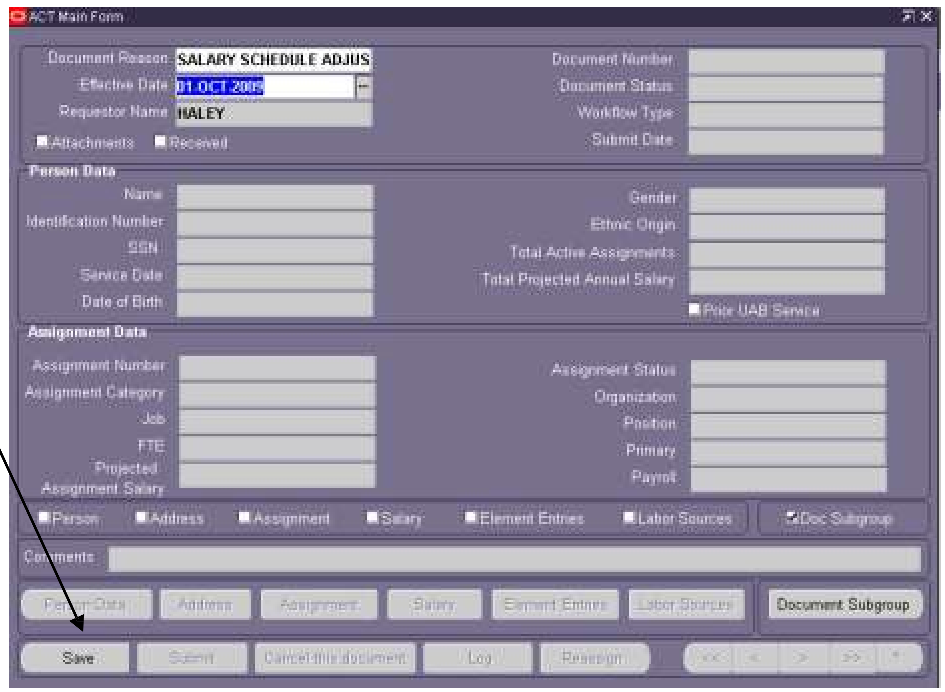
6. Select the description that best explains the nature of the transaction. For a complete list of available **DOCUMENT SUBGROUP DESCRIPTIONS** and explanation of when to use, ***click here.***

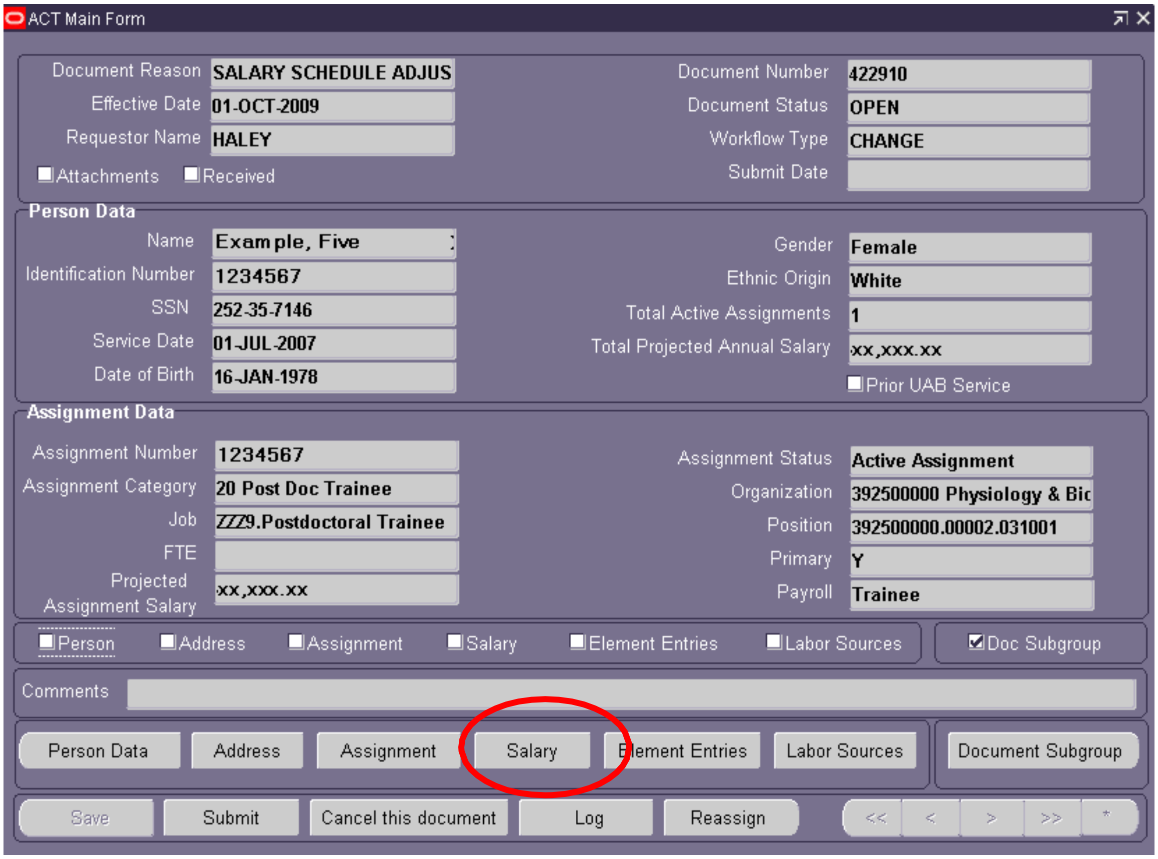
7. Click on **OK** to select.

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



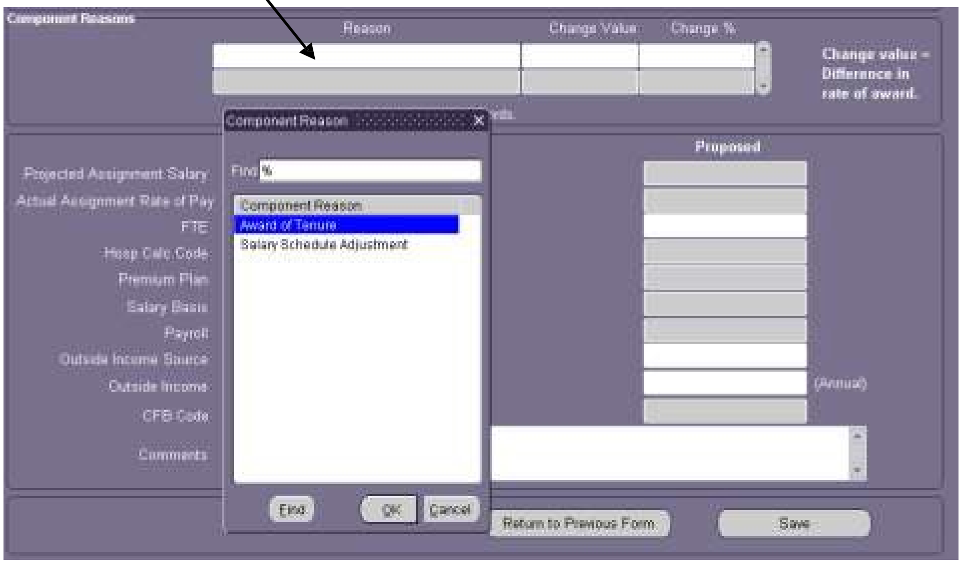
9. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM.**



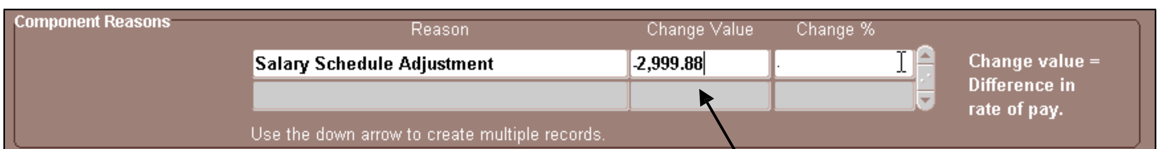


10. Click on the **SALARY** button located at the bottom of the **ACT MAIN FORM**.

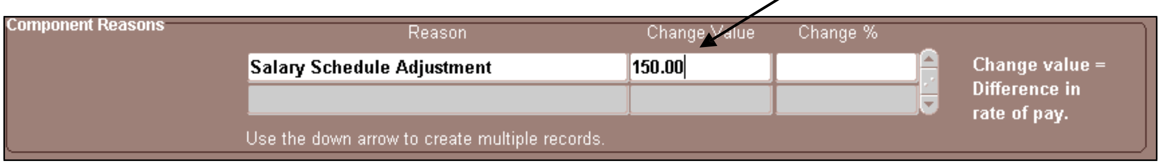
11. Click in the **REASON** field located at the top of the form; select component reason from the LOV. Click **OK**.

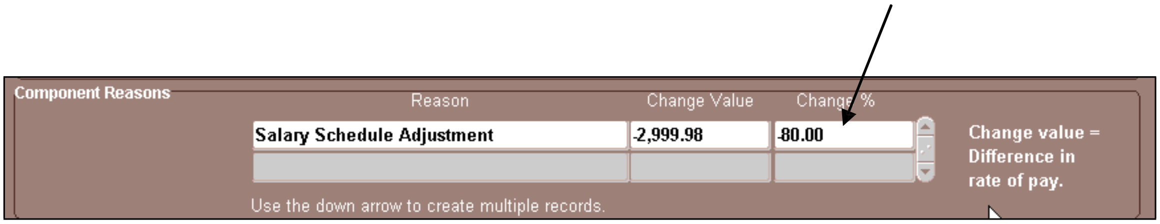


12. Click in the **CHANGE VALUE** field; enter the ***hourly increase amount*** or ***decrease amount*** for biweekly paid employees or the ***monthly increase*** or ***decrease amount*** for salaried employees.

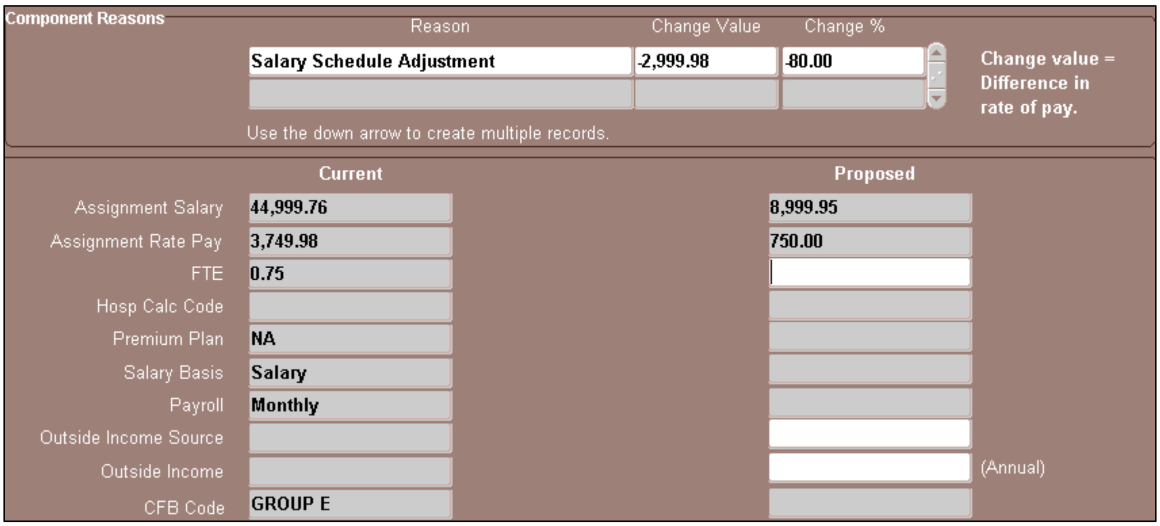


Note: ***If the Salary Schedule Adjustment is a reduction in the employee's hourly rate or monthly rate, indicate the amount to be reduced by entering the negative (-) symbol before the dollar amount to be reduced. If the Salary Schedule Adjustment is an increase in the employee's hourly rate or monthly rate, enter the dollar amount of the increase only.***

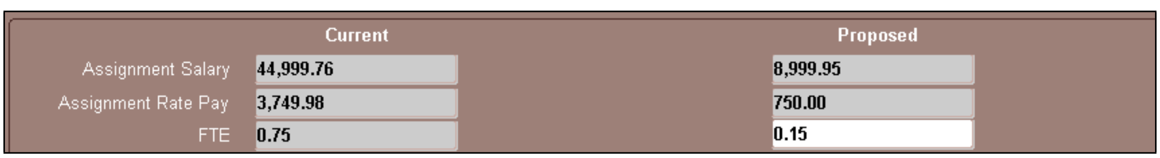




13. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered.

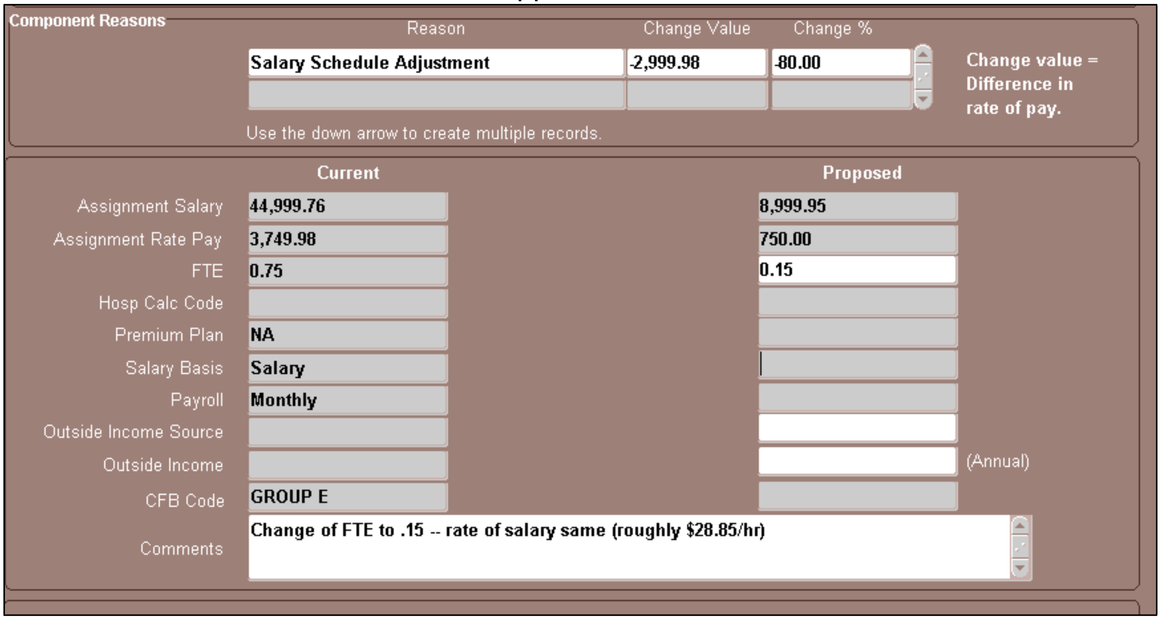


14. If the **FTE** is changing, enter the full-time equivalency for the employee in the **FTE** field. This number should be between 0.0 and 1.0.



15. If the employee is receiving funds from either the VA or Eye Foundation, enter the information in the **OUTSIDE INCOME SOURCE** field, if applicable. This should be an annual amount.

16. Enter ***comments*** as needed in the **COMMENTS** field at the bottom of the **SALARY** form. Comments entered here will appear on the **ACT MAIN FORM**.



Note: ***Use the COMMENTS field to explain the purpose of the Salary Schedule Adjustment. Comments assist both Organizational Approvers and Central Administration in approving the document.***

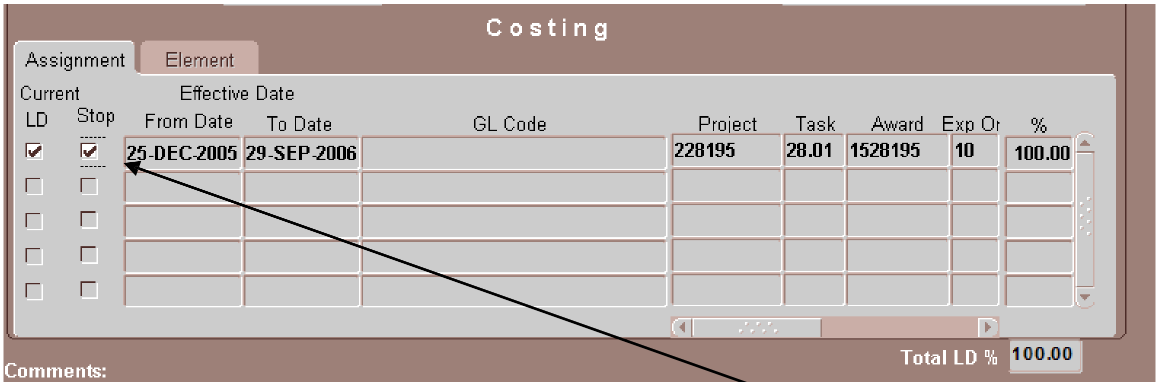
17. Click on the **SAVE** button.

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

19. If the individuals **LABOR SOURCE** information is ***not changing***, and ***you are not submitting Element Entries*** with this document, ***click here.***

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.**



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.

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.

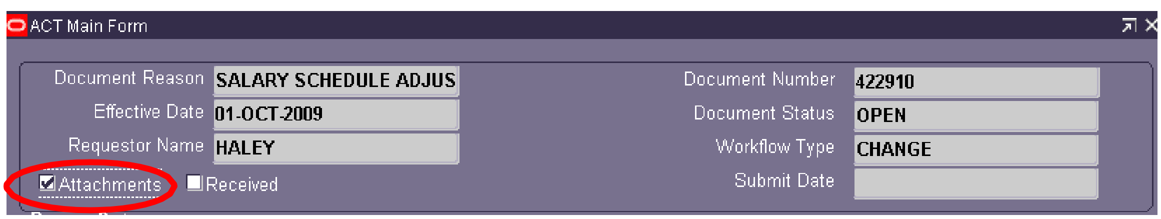
Note: TOTAL LD% must equal 100% before you can save the document.

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.

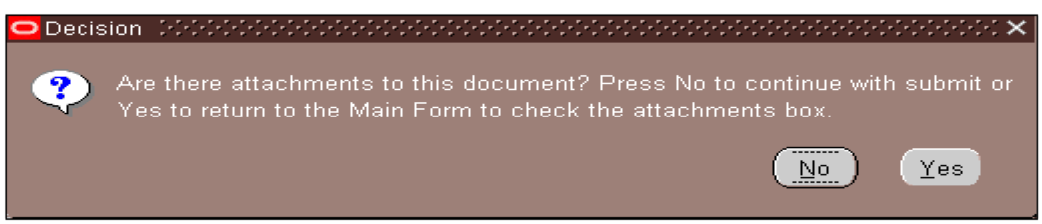
Submitting the Document

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



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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