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*** (in some cases, the proposed pay grade could be lower than the current pay grade). If the proposed job classification is a ***higher pay grade*** than the current pay grade or, if a student employee (06) is transferring to an irregular part-time (04) employee in a different department, use the ***Transfer with Promotion*** document reason.

> ***Note:*** ***The employee's current (Transfer Out) 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.***

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 Transfer In organization will complete or update the following forms/tabs: **ADDRESS/PHONE** (campus information only), **SCHOOLS AND COLLEGES**, **ASSIGNMENT, SALARY,** and **LABOR SOURCE**.

UAB HR Officer → HR Transactions → ACT → Find Window

Current (Transfer Out) Organization:

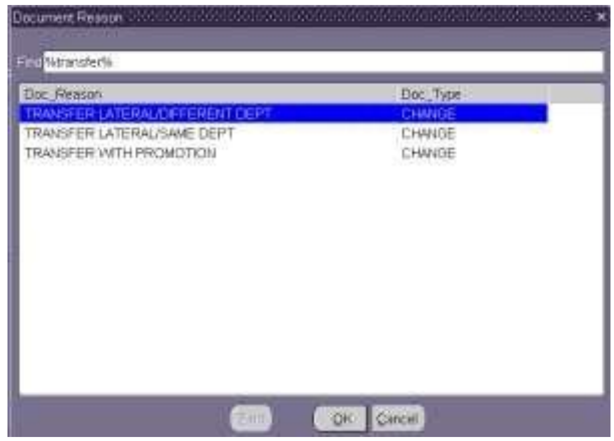
1. Locate individual using the ACT Find window; click on the Create New Document button.

> ***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.***

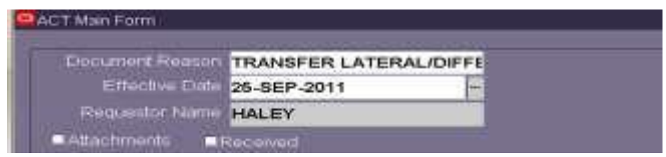
2. The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.

3. Use the **DOCUMENT REASON** LOV to choose or type the words ***Transfer Lateral/Different Department*** in the **DOCUMENT REASON** field.

4. Click on the **OK** button.



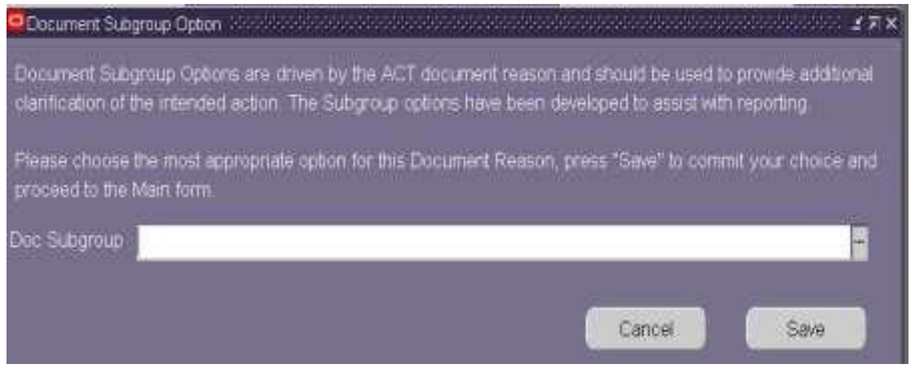
5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the calendar LOV or type in the desired date.



***Note:* The Document Effective Date for all bi-weekly paid employees receiving a Transfer Lateral 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.**

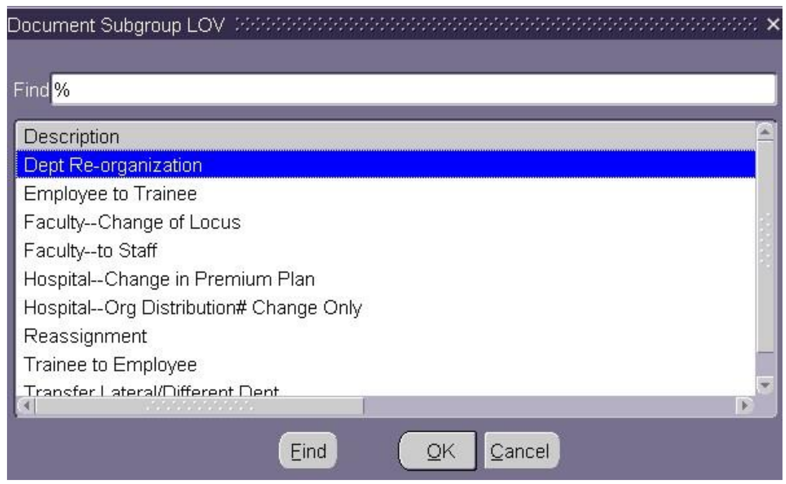
6. Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.

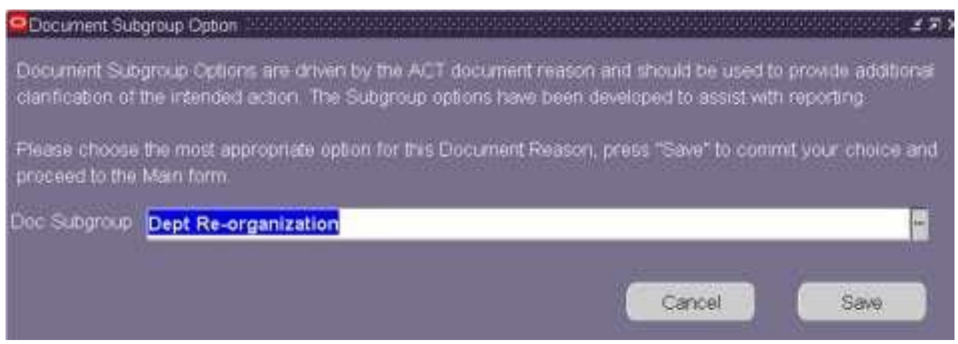
7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **DOC SUBGROUP** field **LOV**.



8. Select the **DESCRIPTION** which best explains the nature of the transaction.

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

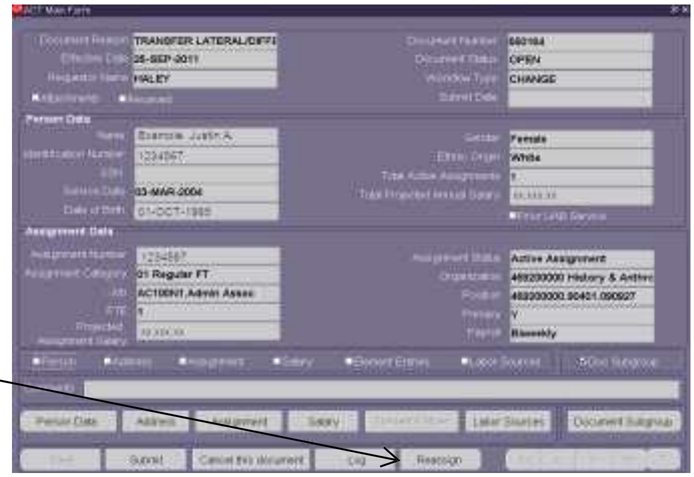




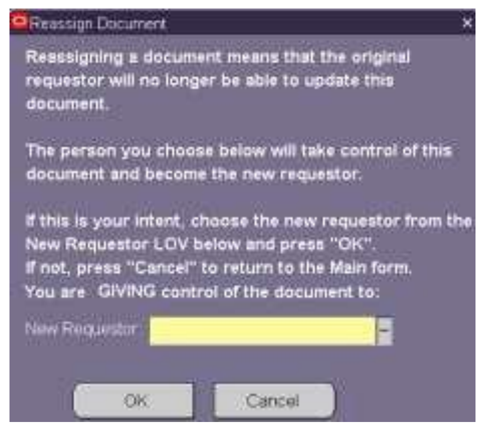
10. Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.

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

12. To reassign the ACT document to a requestor in the new org, click on the **REASSIGN** button located at the bottom the **ACT MAIN FORM**.



A message box similar to the message on the right should appear:



13. Click inside the **NEW REQUESTOR** field and enter the ***Requestor's last name, first name*** as it is listed in Oracle or use the LOV to locate the Requestor who will be receiving the reassigned document.

14. Once the New Requestor field is populated, click **OK**.

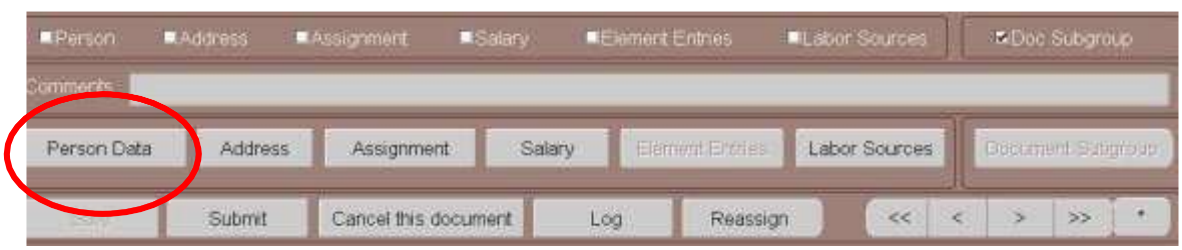
<u>New (Transfer In) Organization</u>

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

2. Click on the **RETRIEVE A DOCUMENT** button. The **ACT MAIN FORM** opens.

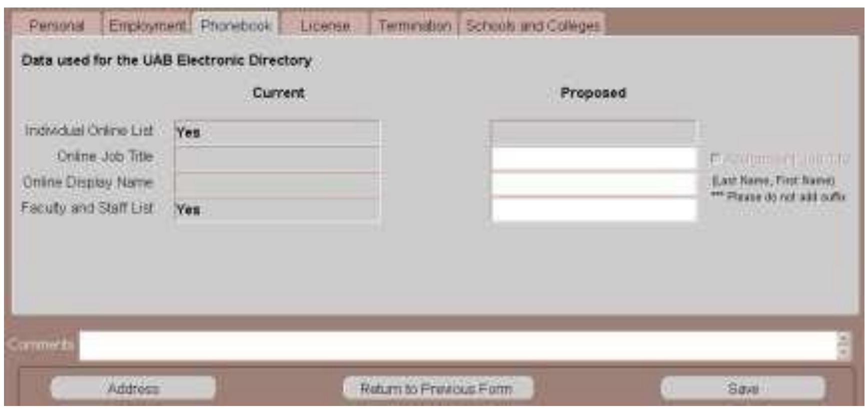
<u>Changing Personal Data</u>

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 available when using a *retroactive* document effective date.

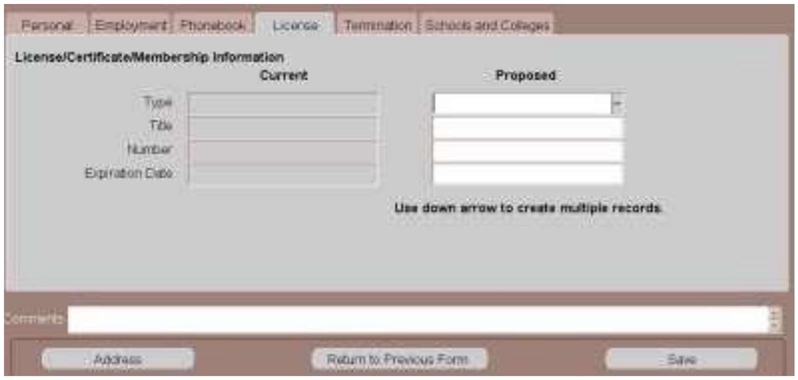


a. If **VISA** information needs to be changed, click on the **EMPLOYMENT** tab. Select the correct Visa type from the **VISA TYPE** LOV; enter the correct **WORK VISA EXPIRATION DATE**. Click on the **SAVE** button at the bottom of the form.

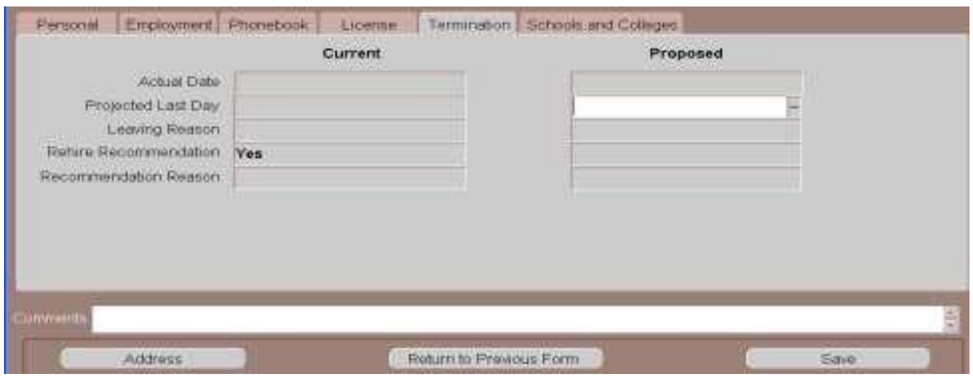
b. If **PHONEBOOK** information needs to be added or changed, click on the **PHONEBOOK** tab. Click on the **SAVE** button after entering the information.



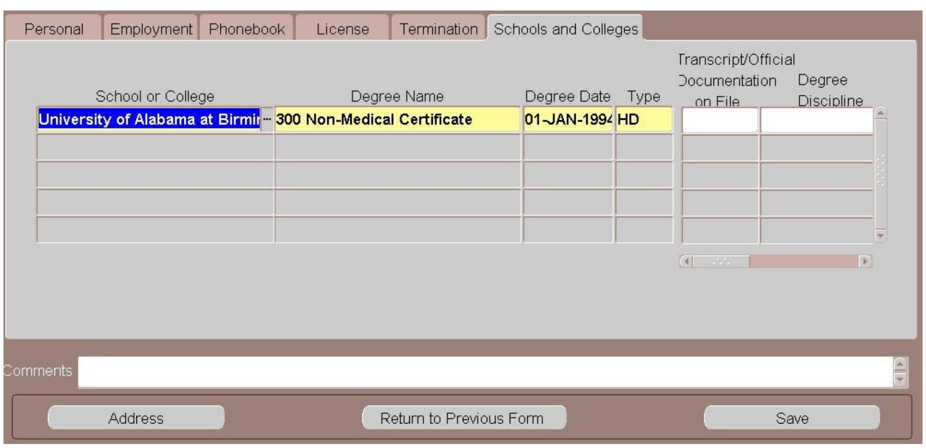
c. If **LICENSE** information needs to be added or changed, click on the **LICENSE** tab; choose the appropriate entry from the **TYPE** field LOV. Click on the **SAVE** button after entering the information



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.



3. Click on the **Schools and Colleges** tab.



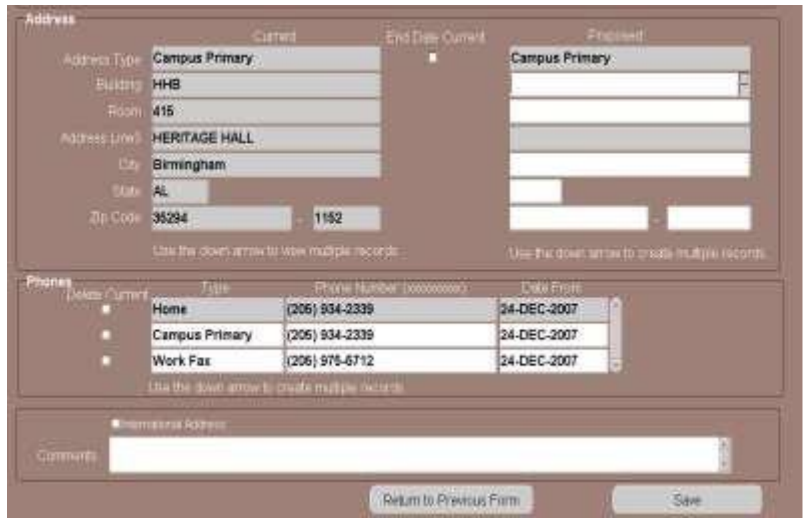
a. If Schools and Colleges information displays and is ***accurate***, click on the **Save** button located at the bottom of the form.

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 choosing the Country and clicking on the next available line.

- Enter Transcript and Degree Discipline information as required.

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

5. 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.



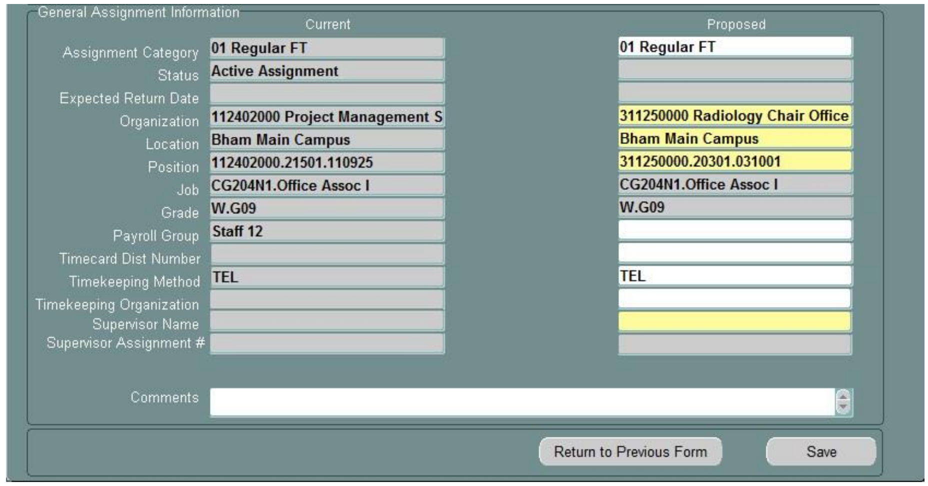
Changing Assignment Information

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

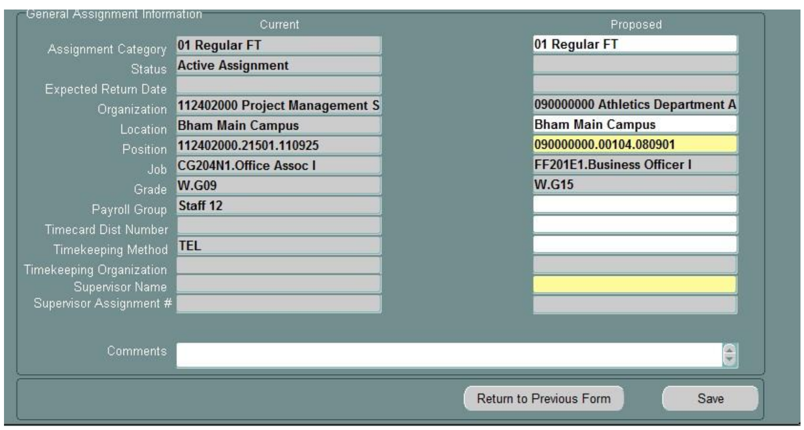
2. If the employee's **ASSIGNMENT CATEGORY** will be changing, select the appropriate **ASSIGNMENT CATEGORY** from the LOV or type it in the field. This is not a required field when using the **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.

3. The **ORGANIZATION, LOCATION** and **POSITION** fields are required fields when using the **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.

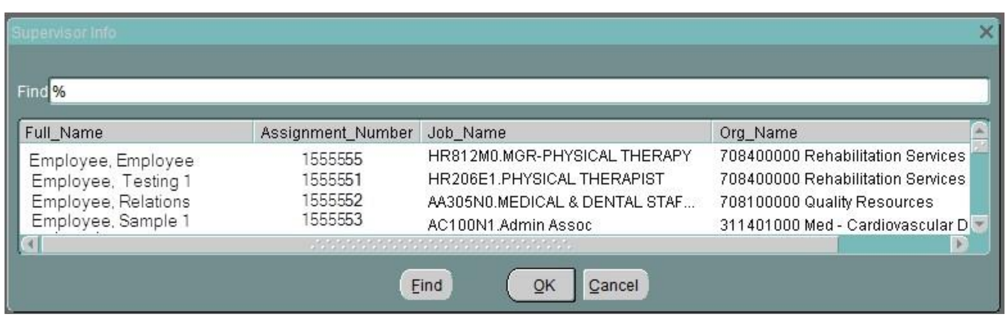
4. Click in the **POSITION** field and select the ***appropriate position numbers*** from the LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. The selection of position code populates the **ORGANIZATION, LOCATION, JOB** and **GRADE** fields.



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.



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.

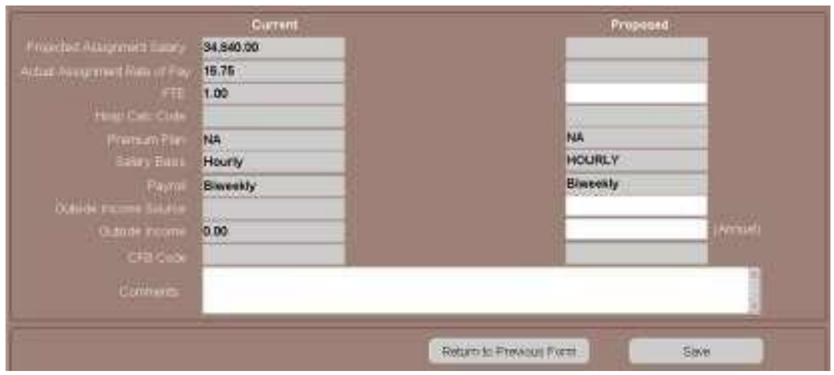


8. Click on the **SAVE** button.

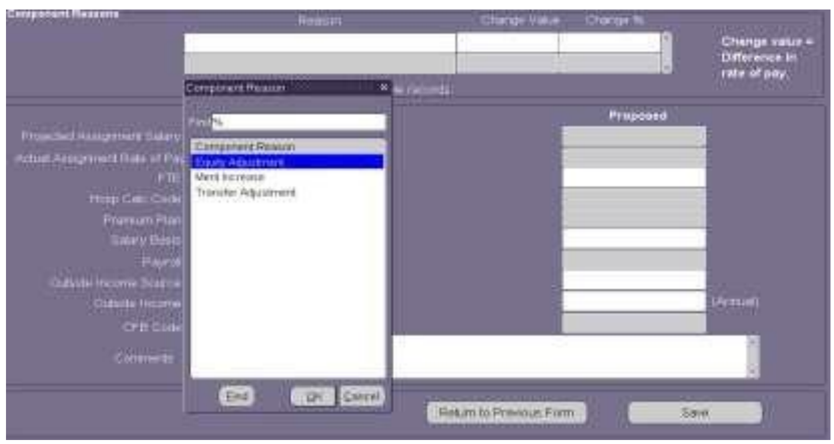
9. Click on the **RETURN TO PREVIOUS FORM** button.

Changing Salary Information

1. To change the Salary information, click on the **SALARY** button, located on the **ACT MAIN FORM**.

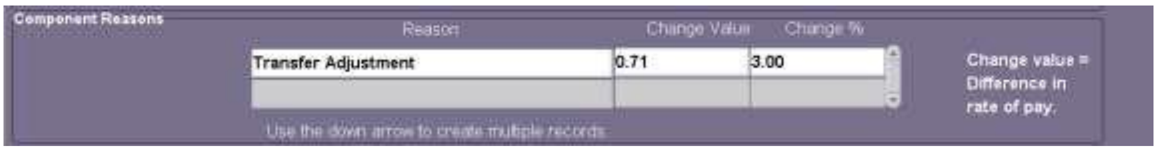


2. If required, click in the **SALARY BASIS** field and select correct salary basis from the LOV. (***Note:*** This field will vary based on other field information such as ***Organization*** and ***Position***). Click **OK**.



3. When changing the employee's **ACTUAL ASSIGNMENT RATE OF PAY**, click in the **REASON** field located in the **COMPONENT REASONS** section. Select the appropriate reason from **COMPONENT REASON** LOV listing. Click **OK**.

4. 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.



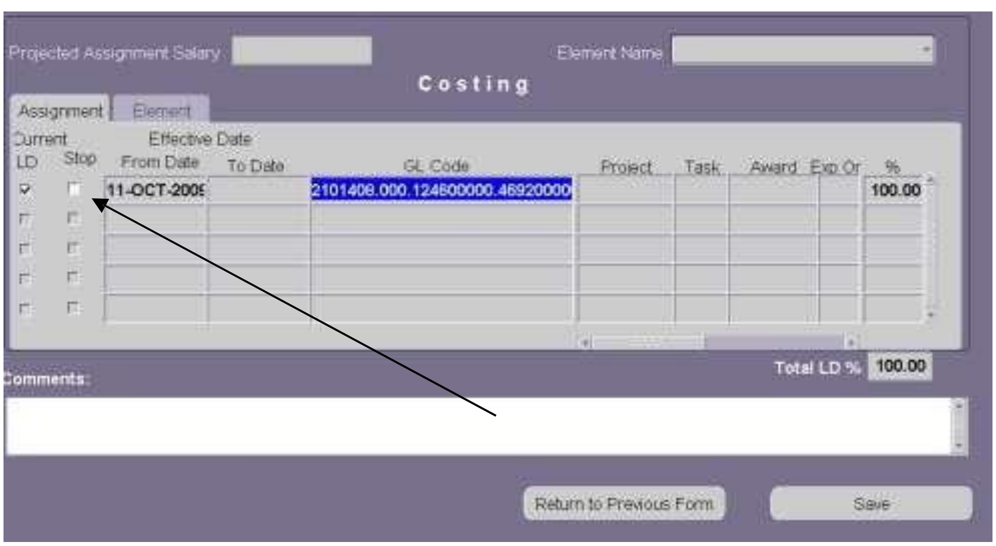
5. If the **FTE** is changing, enter the ***full-time equivalency*** for the employee in the **FTE** field.

6. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.

7. 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.**



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.

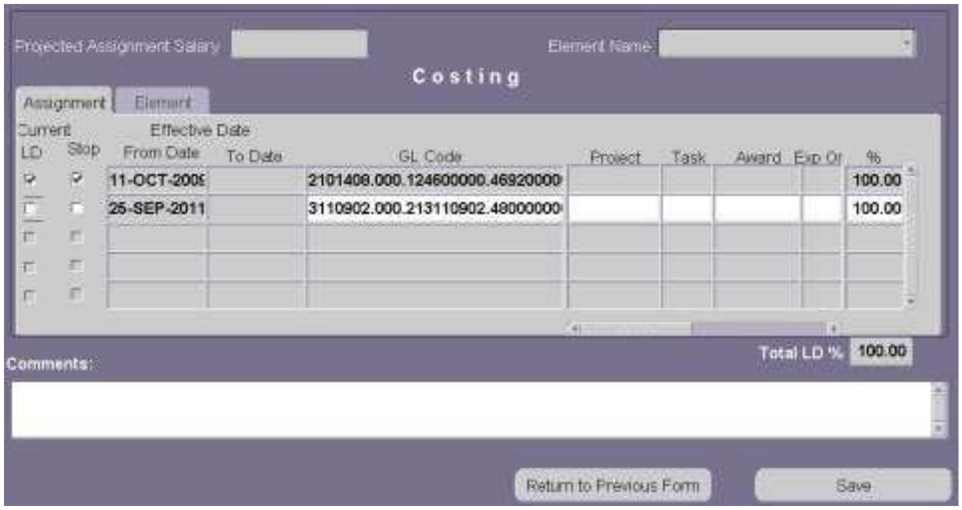
   c. Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field.
   d. Type in the ***organization number*** or choose the ***Expenditure Organization number*** from the LOV.

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*.**

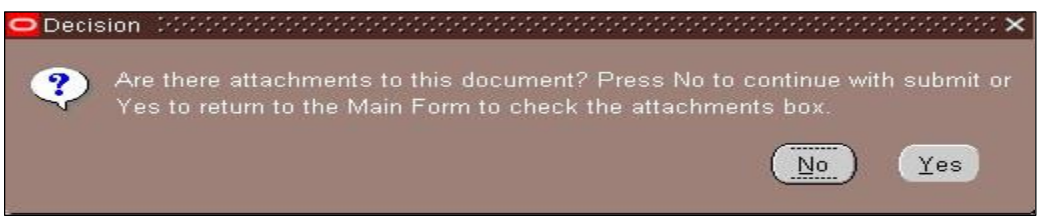
   f. Enter ***comments***, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.



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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