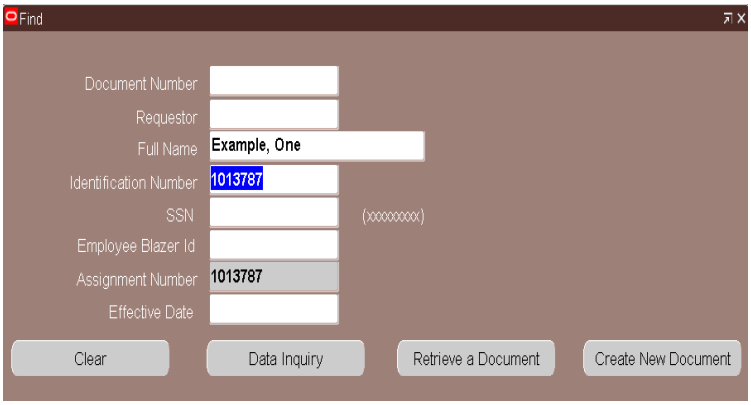
ACT Merit Increase Document Instructions 2012

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 ***Merit 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.

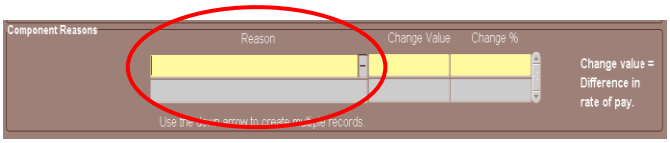
- ***All Bi-Weekly paid employees must have Merit Increase documents dated on a Sunday for payroll purposes.***
- ***All Monthly paid employees must have Merit Increase documents dated from the beginning of the month.***

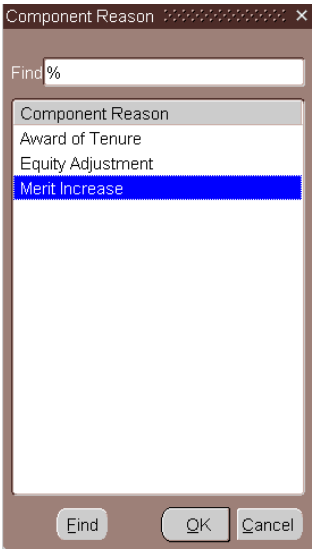
6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM.**

DOCUMENT NUMBER now displays and the document is in **OPEN** status.

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.



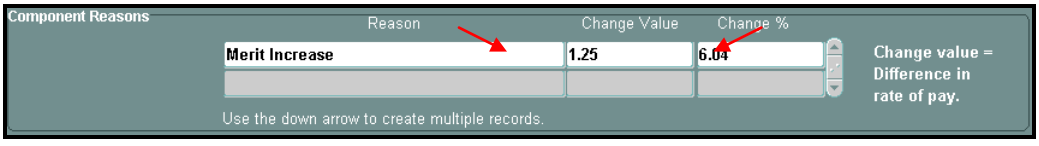


9. Select **MERIT INCREASE** from the **LOV** in **REASON** field.

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 $4,354.17 per month and will increase to $4,500.00 per month, enter $145.83.***

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

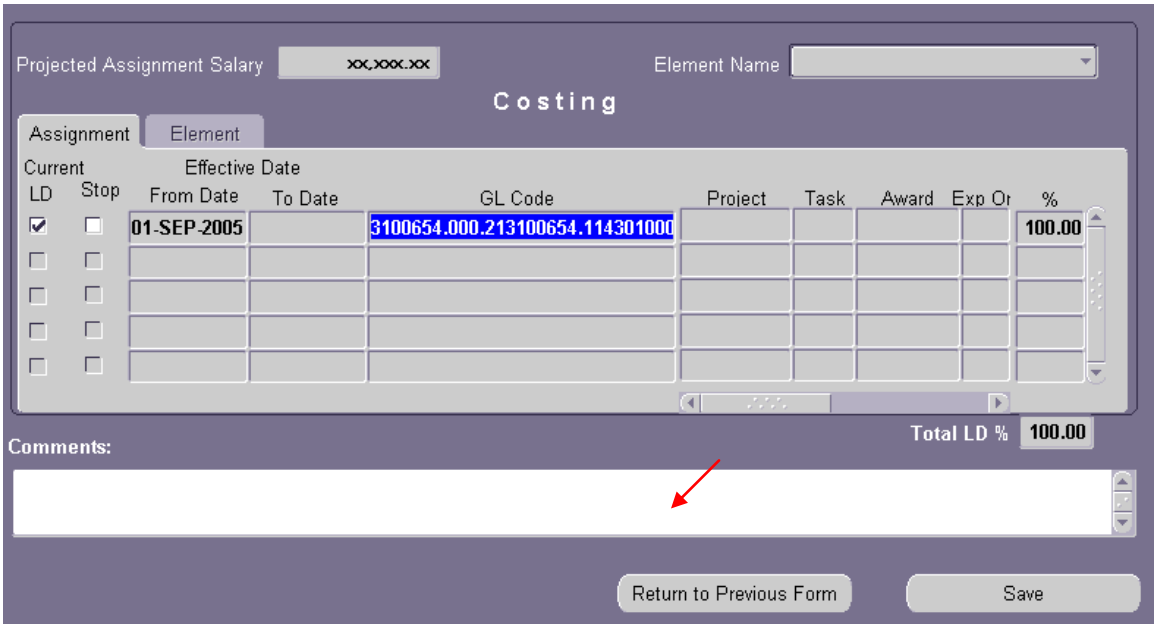
13. Click on the **SAVE** button.

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

If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a ***Merit Increase*** document, ***click here***.
If the employee's Labor Source information must be changed proceed on to step 16.

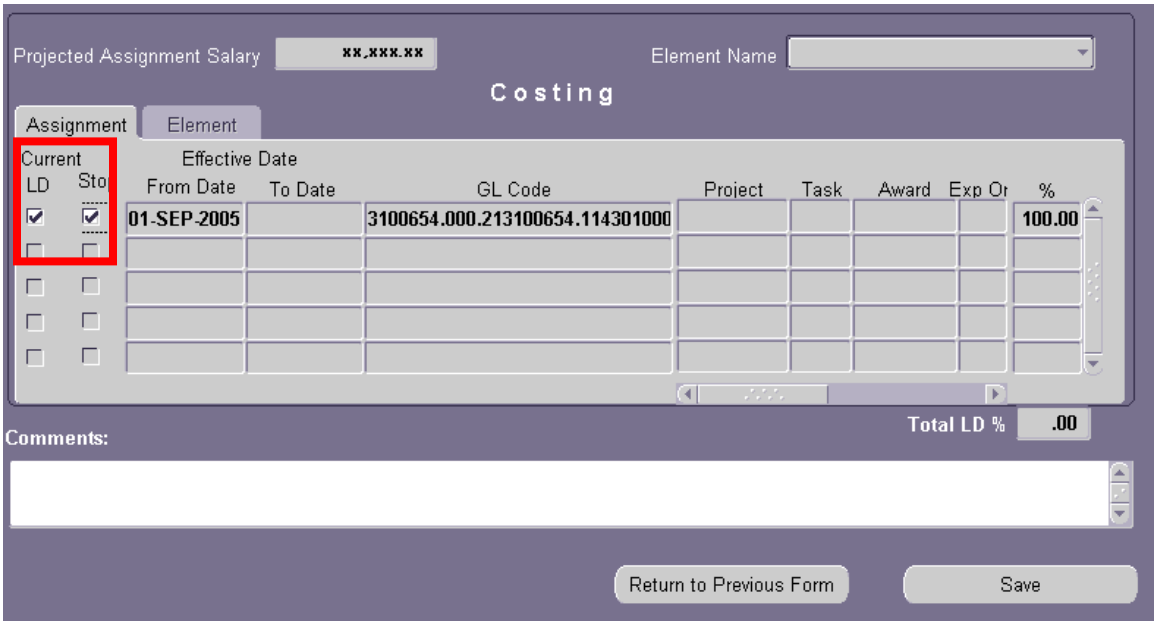
15. If the labor sources are changing for an employee, click on the **LABOR SOURCES** button on the **ACT MAIN FORM.**

16. The **LABOR SOURCES** form opens.

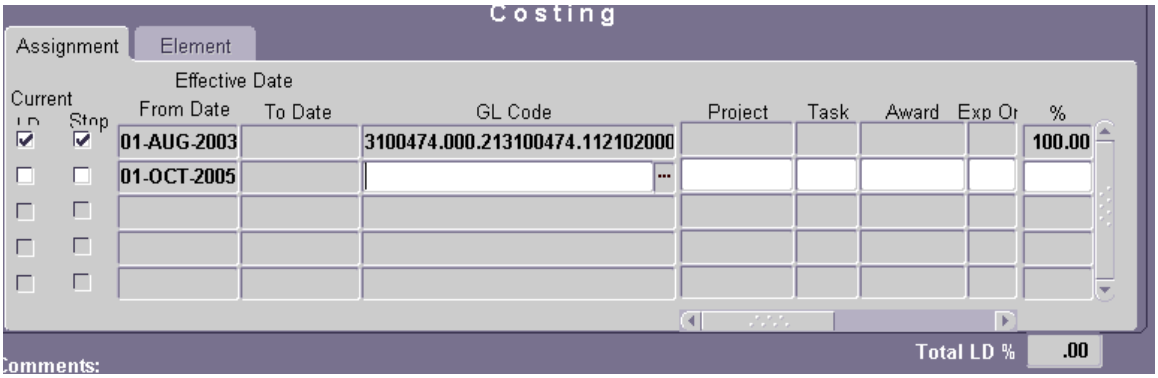


Entering GL Funding Sources

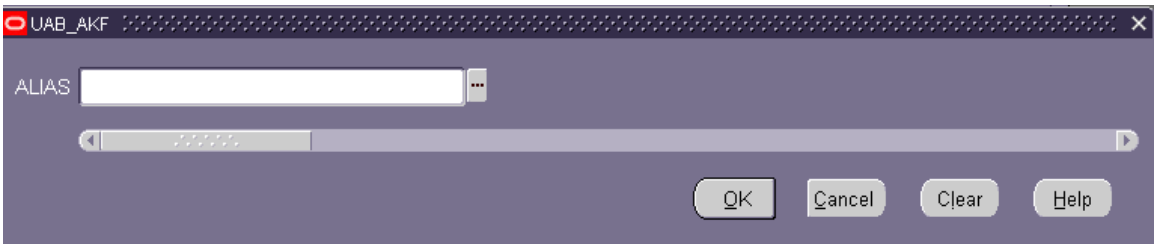
Note: If you are entering ***new GL or GA*** information for an employee, you must stop the other labor sources by clicking in the **STOP** checkbox located to the left of each funding source before entering new ones.



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



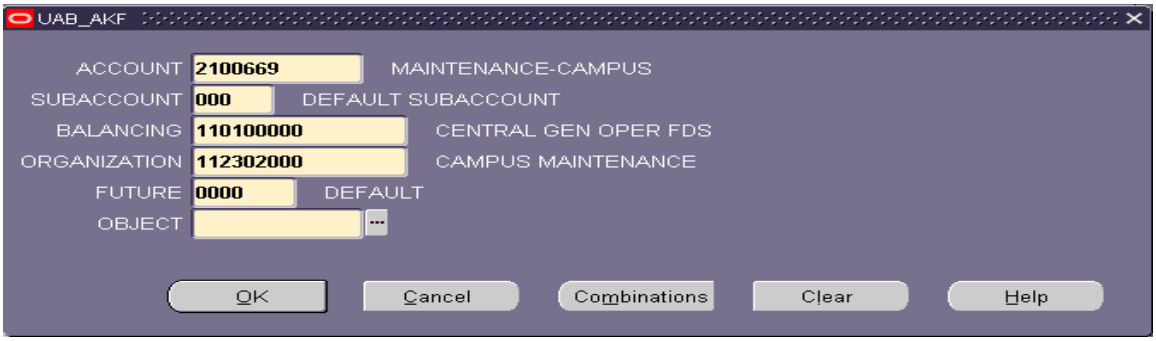
18. Click on the LOV. This opens the **UAB_AKF FIND WINDOW**.



19. Click on the LOV icon in the **ALIAS** field.

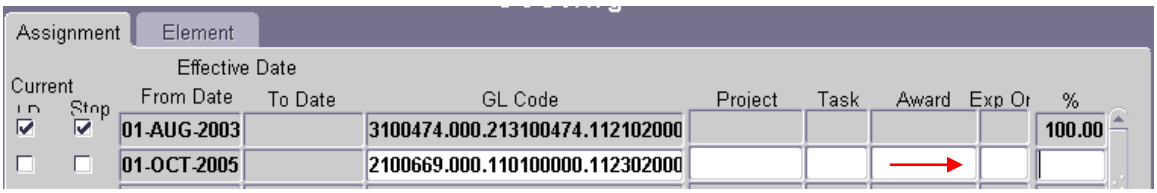
20. Enter ***the new funding source account number*** or use the **% WILD CARD** to perform a search. Enter as much information as possible to limit your search.

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

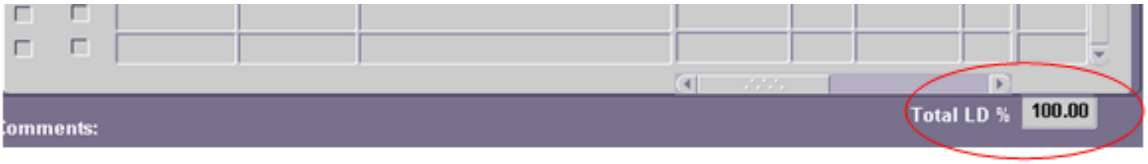


22. Type ***"0" zero*** in the **OBJECT** field. Click **OK**.

23. The **LABOR SOURCES** form opens displaying the account string information in the **GL CODE** field.



24. 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.

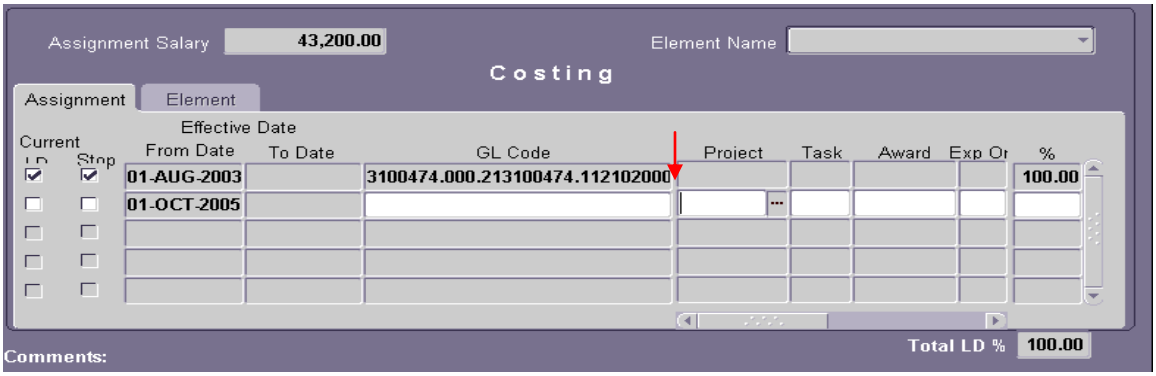


Note: TOTAL LD% must equal 100% before you can save the document.

25. Repeat the above steps, as needed, for entering all GL account funding sources.

Entering Grant Funding Sources

26. 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.***

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

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

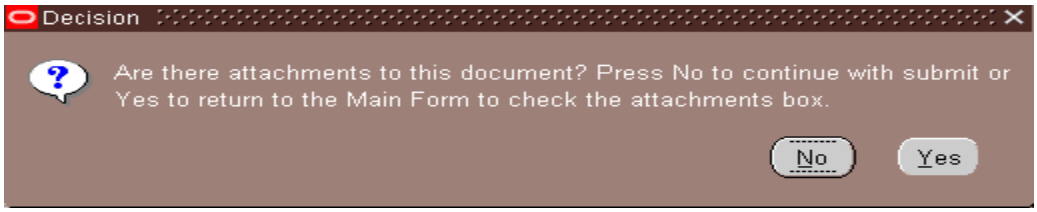
29. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

30. Click on the **SAVE** button.

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

32. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.

33. Once the document is submitted the following window appears.



34. Click **NO** to continue since **ATTACHMENTS** are not required.

35. 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).

36. Once the ***Merit 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**.

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