

## Appoint, Change and Terminate (ACT) Documentation

### Processing an Education Leave Document with pay and without pay

The following documentation explains how to process an Educational Leave of Absence where a portion of the leave period is **with pay** and a portion of the leave period is **without pay**.

**Scenario:** Amy Buckle has been approved an Educational Leave of Absence beginning October 01, 2009 through May 31, 2010. Amy has sufficient accrued benefit time to remain in a **paid** status through December 31, 2009. Amy Buckle will enter into an **non paid** status effective January 1, 2010; she anticipates returning to work June 1, 2010.

If an employee has accrued benefit time available, an **Education Leave with Pay ACT Document (Step One)** must be created for the period of time in which the employee is to receive pay. Once the employee's accrued benefit time has been exhausted, the employee will no longer receive a paycheck from UAB and must be placed in a "non-paid status". An **Education Leave without Pay Document (Step Two)** must be created for the duration of the leave of absence.

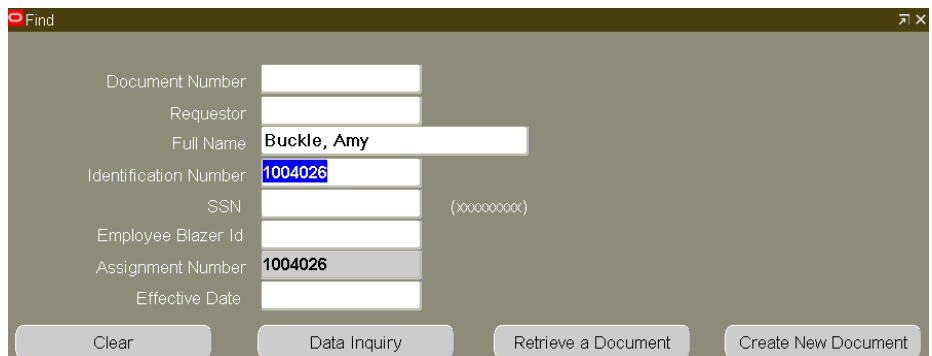
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UAB HR Officer → HR Transactions → ACT → Find Window

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#### Step One: Creating the Education with Pay Document

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



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

3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.

4. Use the **DOCUMENT REASON LOV** to choose **EDUCATION LEAVE WITH PAY** or type the words **Education Leave with Pay** in the **DOCUMENT REASON** field.



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- 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-MMM-YYYY** format.

ACT Main Form

Document Reason	EDUCATION LEAVE WITH F	Document Number	
Effective Date	01-OCT-2009	Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

- Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The Administrative System will automatically generate a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** field will be **OPEN**.

ACT Main Form

Document Reason	EDUCATION LEAVE WITH F	Document Number	462406
Effective Date	01-OCT-2009	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	LEAVES
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

ACT Main Form

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

Save Submit Cancel this document Log Reassign << < > >> \*

- Click on the **ASSIGNMENT** button from the **ACT MAIN FORM**. The **ASSIGNMENT FORM** will open.
- Click in the **EXPECTED RETURN DATE** field. Enter the date the employee will enter into a "non-paid status" using the calendar LOV.

General Assignment Information

	Current	Proposed
Assignment Category	01 Regular FT	
Status	Active Assignment	Leave With Pay
Expected Return Date		01-JAN-2010

**Note:** This date is determined by adding the employee's benefit time accrual balances and updates the employee will receive during the with pay portion of the leave of absence. Once all accrued and earned benefit time has been paid, the employee will enter a "non-paid" status.

- Enter similar comment in the **COMMENTS** field at the bottom of the **ASSIGNMENT** form. Comments entered here will appear on the **ACT MAIN FORM**.

Assignment Form

Comments: Education Leave of Absence without pay 01-JAN-2010 through 31-MAY-2010

Salary Labor Sources Element Entries Return to Previous Form Save

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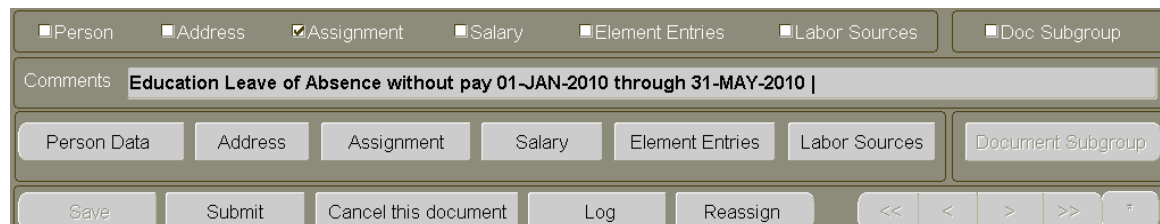
**Note:** inserting a comment when the employee will be entering a non-pay status, will alert HRM Records Administration an **Education Leave without pay document** will be submitted once the **Education Leave with pay document** is “Complete”.

10. Click on the **SAVE** button at the bottom of the **ASSIGNMENT** form.
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
12. Click in the **ATTACHMENT** box; a **Checkmark** will appear. **Attachments are required for Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**



The screenshot shows the 'ACT Main Form' window. On the left, there are fields for 'Document Reason' (EDUCATION LEAVE WITH F), 'Effective Date' (01-OCT-2009), and 'Requestor Name' (HALEY). Below these is a checkbox labeled 'Attachments' which is checked, and a 'Received' checkbox which is unchecked. On the right, there are fields for 'Document Number' (462406), 'Document Status' (OPEN), 'Workflow Type' (LEAVES), and 'Submit Date'.

13. A **check mark** now appears in the **ASSIGNMENT** CHECKBOX, indicating a change has been entered on the **ASSIGNMENT** form.



The screenshot shows the 'ACT Main Form' window with a different set of tabs. The 'Assignment' tab is selected, and the 'Comments' field contains the text 'Education Leave of Absence without pay 01-JAN-2010 through 31-MAY-2010 |'. Below the comments are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**.
15. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.
16. Once the document is approved by all approval levels; the document status changes to “**COMPLETE**”.



The screenshot shows the 'ACT Main Form' window. The 'Document Status' field now displays 'READY' instead of 'OPEN'. The 'Document Number' (462406) and 'Workflow Type' (LEAVES) remain the same. The 'Submit Date' is now '01-OCT-2009 16:23:14'.

Proceed onto: [Step Two: Creating the FMLA without Pay Document.](#)

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### Step Two: Creating an Education Leave without Pay Document

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

The Find window contains the following fields and values:

Document Number	
Requestor	
Full Name	Buckle, Amy
Identification Number	1004026
SSN	(xxxxxxxxxx)
Employee Blazer Id	
Assignment Number	1004026
Effective Date	

Buttons at the bottom: Clear, Data Inquiry, Retrieve a Document, Create New Document.

2. Click on the **CREATE NEW DOCUMENT** button.
3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.
4. Use the **DOCUMENT REASON LOV** to choose **FMLA WITHOUT PAY** or type the words **FMLA without Pay** in the **DOCUMENT REASON** field.

The ACT Main Form displays the following information:

Document Reason	EDUCATION LEAVE WITHO	Document Number	
Effective Date		Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

5. 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-MMM-YYYY** format.

The ACT Main Form now shows:

Document Reason	EDUCATION LEAVE WITHO
Effective Date	01-JAN-2010
Requestor Name	HALEY
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received

***Note: The EFFECTIVE DATE of the EDUCATION LEAVE WITHOUT PAY document will be the same as the EXPECTED RETURN DATE on the EDUCATION LEAVE WITH PAY document.***

General Assignment Information		Current	Proposed
Assignment Category		01 Regular FT	
Status		Leave With Pay	Leave With Pay
Expected Return Date		01-JAN-2010	01-JAN-2010

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6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The Administrative System will automatically generate a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** field will be **OPEN**.
7. Click on the **ASSIGNMENT** button from the **ACT MAIN FORM**. The **ASSIGNMENT FORM** will open.

The screenshot shows the 'General Assignment Information' form. It has two main sections: 'Current' and 'Proposed'. In the 'Current' section, the 'Assignment Category' is '01 Regular FT', the 'Status' is 'Leave With Pay', and the 'Expected Return Date' is '01-JAN-2010'. In the 'Proposed' section, the 'Status' is 'Leave Without Pay'. A yellow callout box with a red border points to the 'Expected Return Date' field, containing the text: 'Notice: EFFECTIVE DATE of Document and CURRENT EXPECTED RETURN DATE are the same date.'

**Note:** The **CURRENT STATUS** field displays **LEAVE WITH PAY** indicating the employee is in a "pay status"; this document will move the employee into a "non-paid status" as displayed in the **PROPOSED STATUS** field **LEAVE WITHOUT PAY**.

8. Click in the **EXPECTED RETURN DATE** field. Enter the employee's expected return to work date using the calendar LOV. The **EXPECTED RETURN DATE** should be the projected date the employee will actually be returning to work.

This screenshot is similar to the previous one, but the 'Expected Return Date' in the 'Proposed' section is now '01-JUN-2010', indicating it has been updated from the calendar LOV.

**Note:** Entering the date in the EXPECTED RETURN DATE field does not automatically return the employee from leave. You will need to process a Return from Leave document before the employee will be returned to a "Pay Status". The employee will not be paid until the Return from Leave document is in "Complete" status.

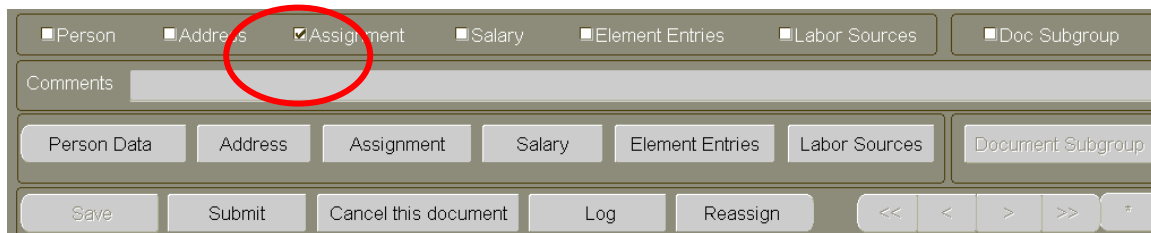
9. Enter Comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
10. Click on the **SAVE** button.
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
12. Click in the **ATTACHMENT** box; a **check mark** will appear. **Attachments are required for all Medical Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**

The screenshot shows the 'ACT Main Form' with the following details: Document Reason: EDUCATION LEAVE WITHO, Effective Date: 01-JAN-2010, Requestor Name: HALEY, Document Number: 462407, Document Status: OPEN, Workflow Type: LEAVES, Submit Date: (empty). There are checkboxes for 'Attachments' (checked) and 'Received' (unchecked).

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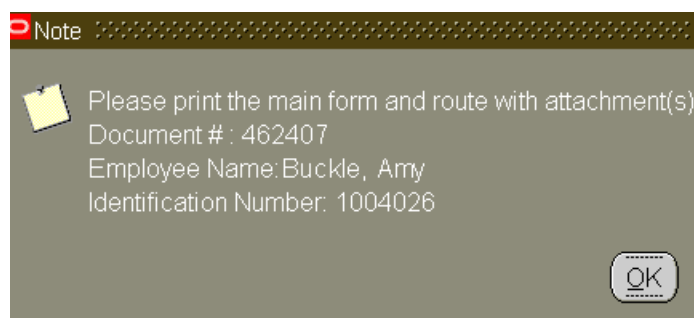
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13. A **check mark** now appears in the **ASSIGNMENT CHECKBOX**, indicating a change has been entered on the **ASSIGNMENT** form.



The screenshot shows the top section of the ACT Main Form. At the top, there are several checkboxes: ☐ Person, ☐ Address, ☒ Assignment, ☐ Salary, ☐ Element Entries, ☐ Labor Sources, and ☐ Doc Subgroup. The ☒ Assignment checkbox is circled in red. Below these checkboxes is a 'Comments' text area. Underneath the comments area is a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom of the form are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows (<<, <, >, >>, \*).

14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**.



The screenshot shows a 'Note' dialog box with a yellow notepad icon. The text inside the dialog box reads: 'Please print the main form and route with attachment(s). Document #: 462407 Employee Name: Buckle, Amy Identification Number: 1004026'. There is an 'OK' button at the bottom right of the dialog box.

15. Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to HRM Records Administration for approval.
16. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.



The screenshot shows the 'ACT Main Form' with the following details:

Document Reason	EDUCATION LEAVE WITHO	Document Number	462407
Effective Date	01-JAN-2010	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	05-JAN-2010 17:44:17

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