Appoint, Change and Terminate (ACT) Documentation
Transfer with Promotion

The **TRANSFER WITH PROMOTION** document reason is used when an employee is transferring to another organization to a job classification that is a ***higher pay grade*** than their current job classification.

> ***Note:*** ***The current 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. For instructions on how to reassign ACT documents, click here.***

Also used when a faculty member transfers to another organization with an associated higher faculty rank. May or may not involve a change in salary.

The new organization requestor should 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

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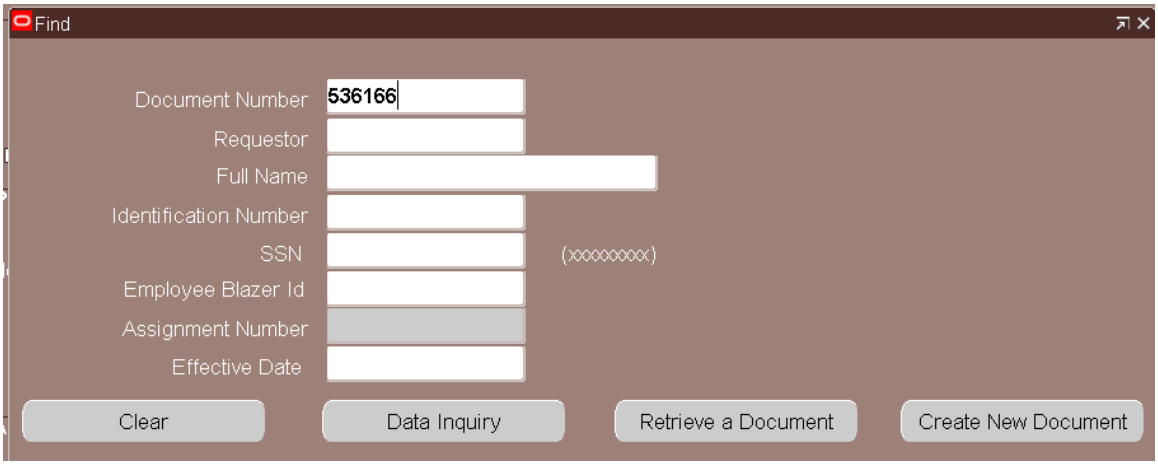
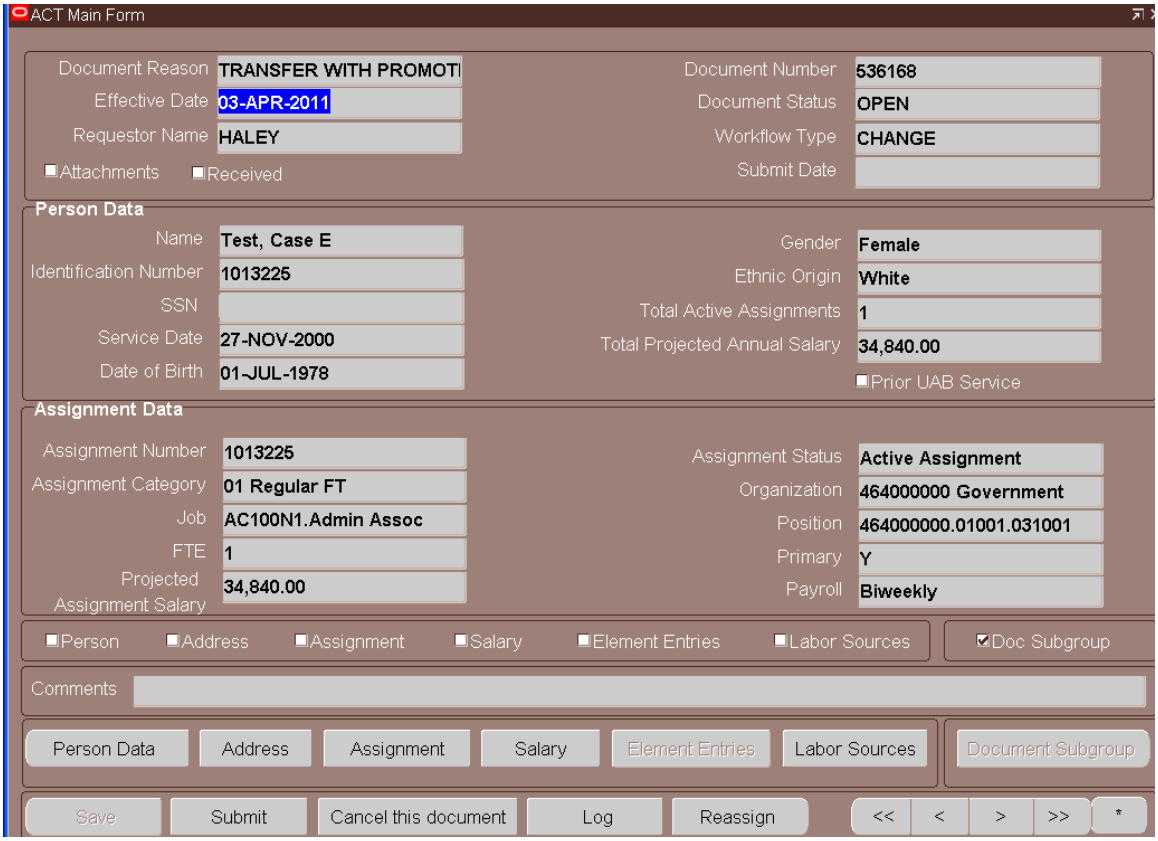
1. Use the **FIND WINDOW** to locate the reassigned document.



2. Click on the **RECTRIEVE A DOCUMENT** button.

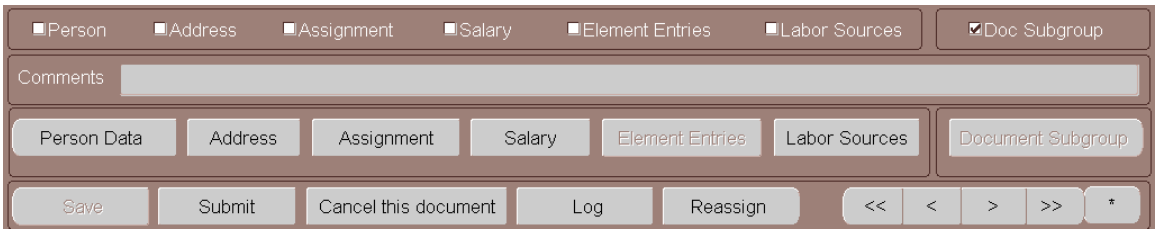
3. The **ACT MAIN FORM** opens.



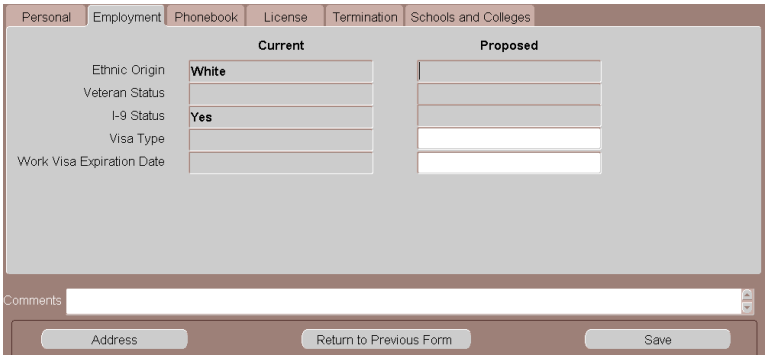
4. If the employee's personal information ***will not*** be changing, ***click here.*** To make changes in the employee's personal information, proceed onto ***Step #5***.

Changing Personal Data

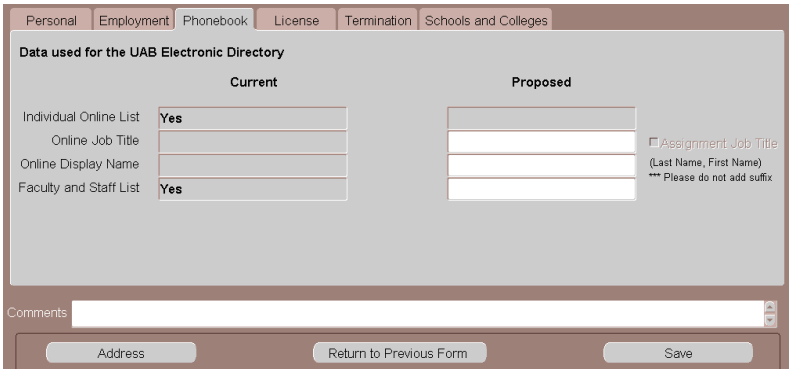
5. If ***personal information*** pertaining to the employee is changing, click on the **PERSON DATA** button. Most tabs and fields (except for the **PERSONAL** tab) will be available for change or update when using a *current* or *future* document effective date. Limited tabs and fields will available when using a *retroactive* document effective date.



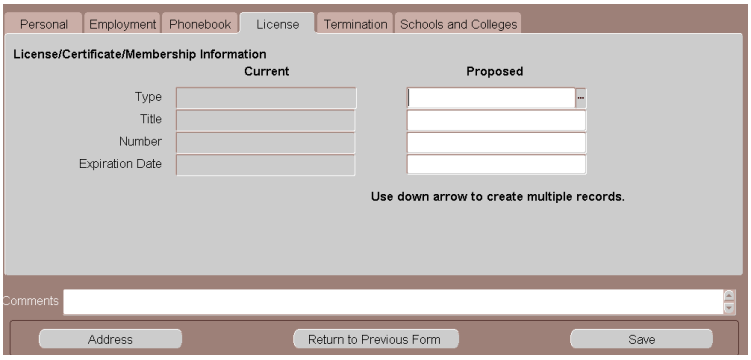
a. If **VISA** information needs to be changed, click on the **EMPLOYMENT** tab. Select the correct Visa type from the **VISA TYPE** LOV; enter the correct **WORK VISA EXPIRATION DATE**. Click on the **SAVE** button at the bottom of the form.



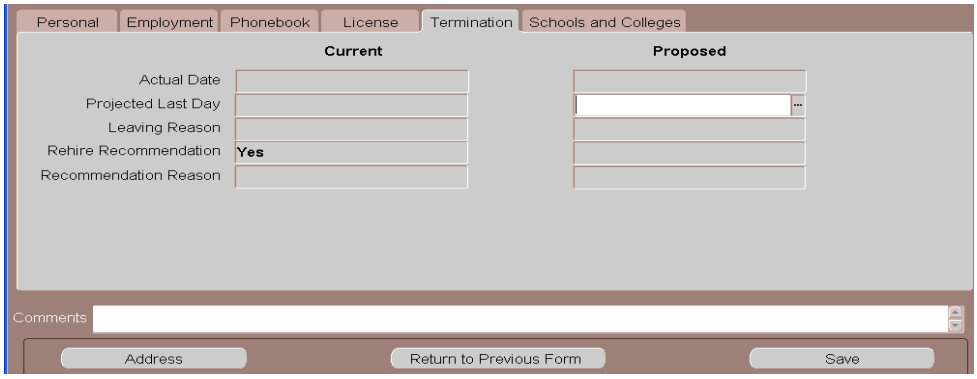
b. If **PHONEBOOK** information needs to be added or changed, click on the **PHONEBOOK** tab. Click on the **SAVE** button after entering the information.



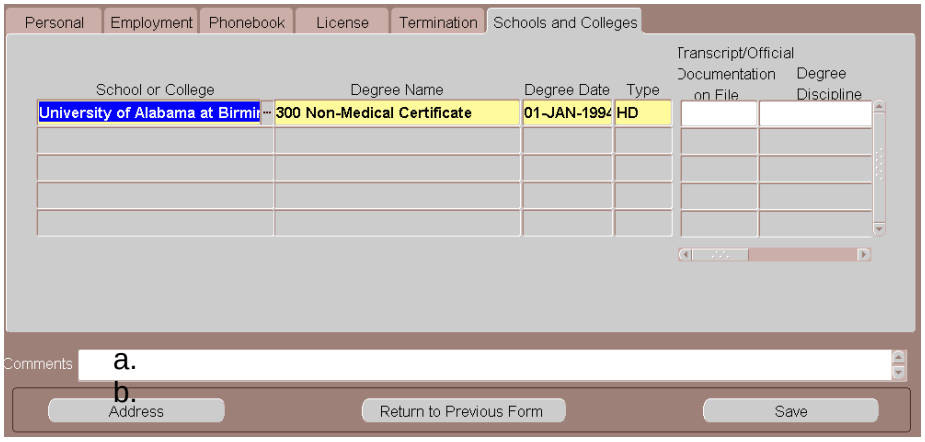
c. If **LICENSE** information needs to be added or changed, click on the **LICENSE** tab; choose the appropriate entry from the **TYPE** field LOV. Click on the **SAVE** button after entering the information



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.



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



a.
b.

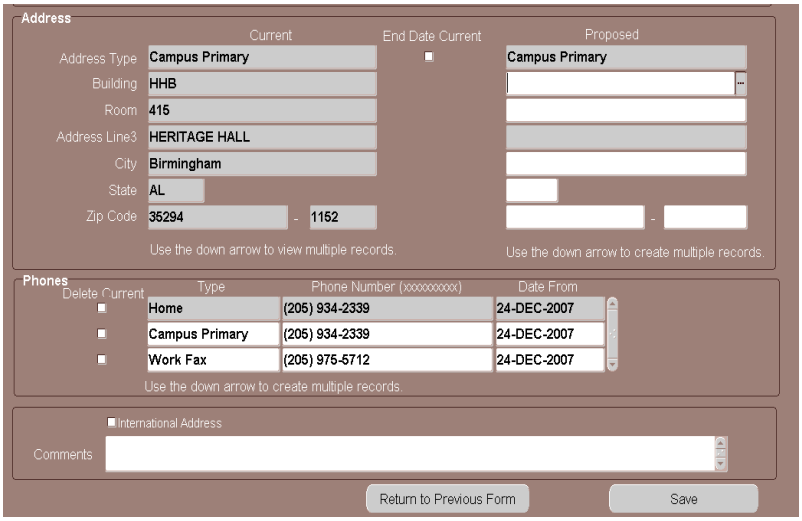
7. If Schools and Colleges information displays and is ***accurate***, click on the **SAVE** button located at the bottom of the form.

8. 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.

   For detailed instructions on entering **SCHOOLS AND COLLEGES** information, ***click here***.

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

10. 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.



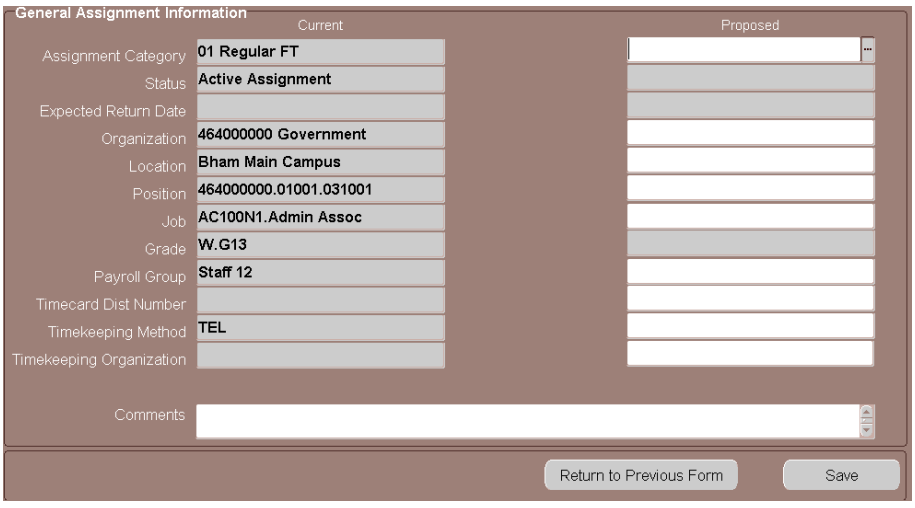
For Instructions on entering or changing address and phone information, ***click here.***

Changing Assignment Information

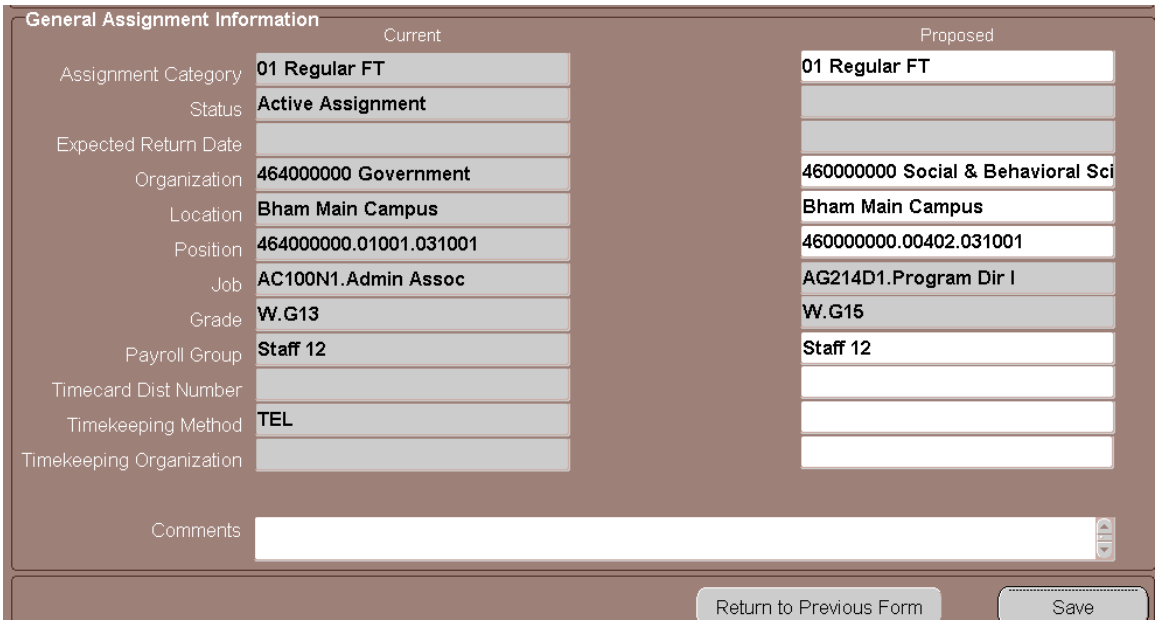
1. To change the employee's ***assignment information***, click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**.

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. Click in the **POSITION** field and select the ***appropriate position code*** 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.



4. The **PAYROLL GROUP** and all three **TIMEKEEPING** fields are available for change or update if necessary.

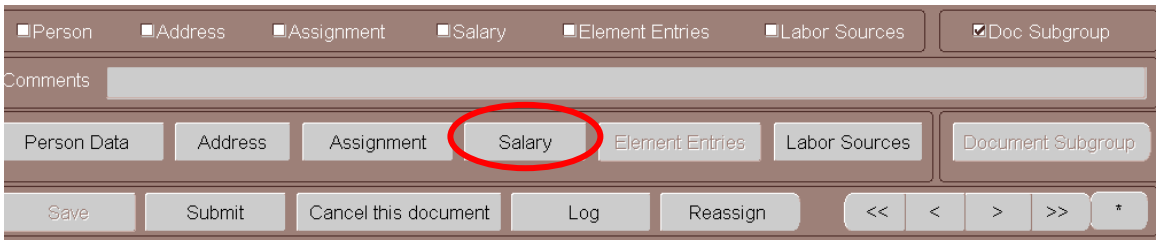
5. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.

6. Click on the **SAVE** button.

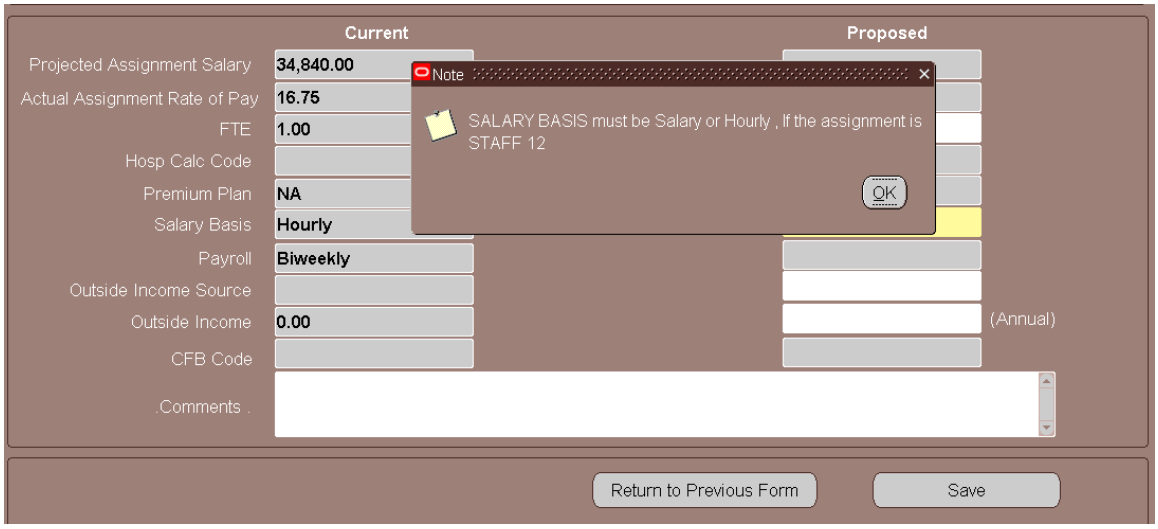
7. Click on the **RETURN TO PREVIOUS FORM** button.

Changing Salary Information

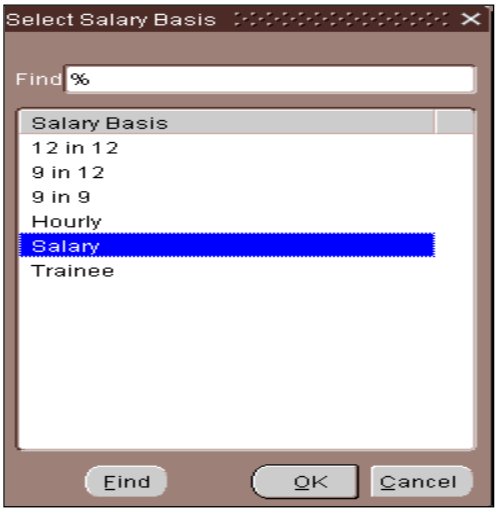
1. To change the Salary information, click on the **SALARY** button, located on either the **ACT MAIN FORM** or on the **ASSIGNMENT** form.



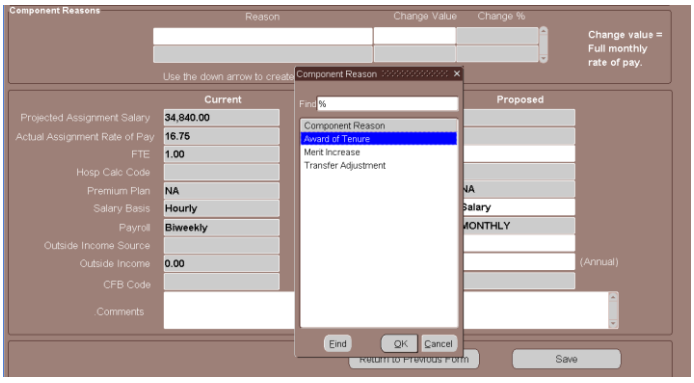
2. Click in the **SALARY BASIS** field if required.



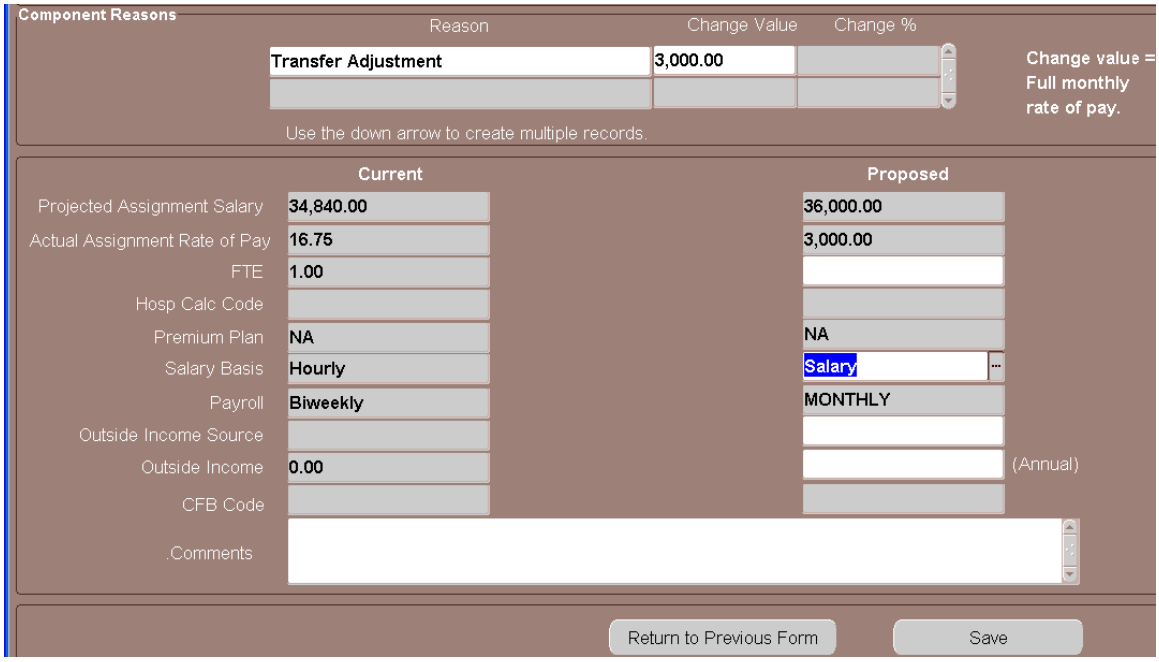
3. Use the LOV to enter the correct **SALARY BASIS** information or type it in. This field will vary based on other field information such as ***Organization*** and ***Position***. Click **OK**.



4. Click in the **REASONS** field located at the top of the form, select **TRANSFER ADJUSTMENT** from the LOV.



5. 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.



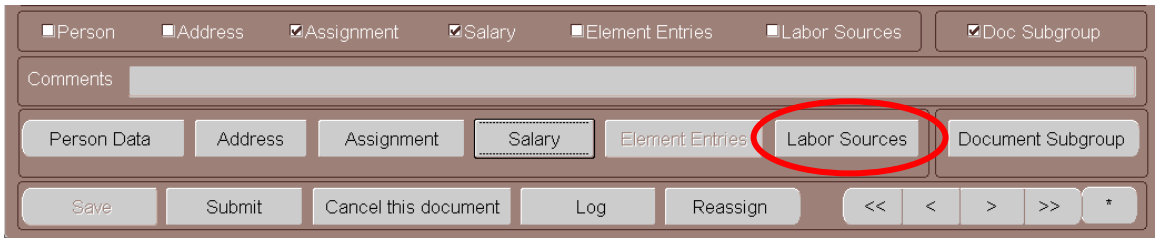
6. If the **FTE** is changing, enter the ***full-time equivalency*** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.

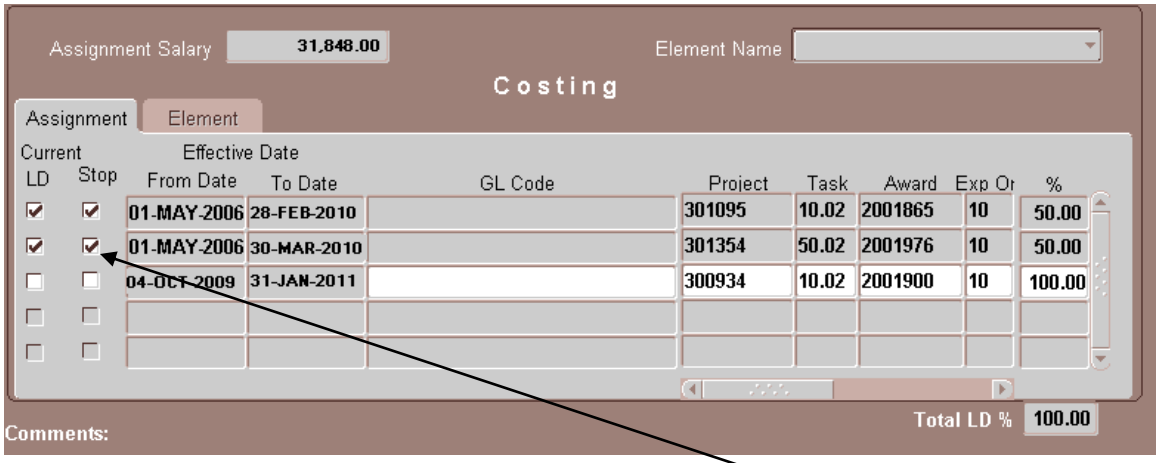
7. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.

8. 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**.

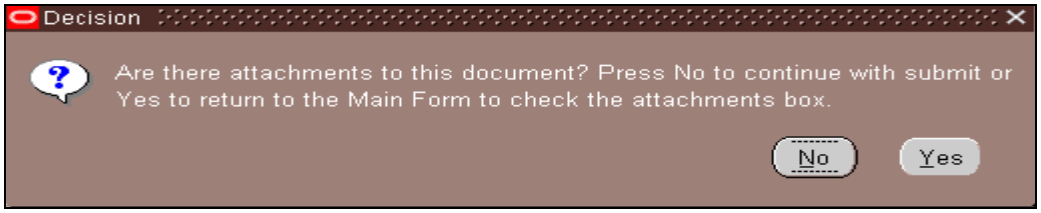
g. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

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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