Appoint, Change and Terminate (ACT) Documentation
Recurring (Element) Document

On the *HR Officer* responsibility, *Recurring (Element) ACT Documents* enable departments to cost or distribute funding for *future* **Average Flat Rate** (AFR) charges on *Post Doc Trainee's (20)*.

Processing a *Recurring (Element)* ACT document eliminates the need to reallocate AFR charges via the Salary Reclass Form.

Below are step by steps instructions on how to create a *Recurring Element ACT Document*.

Note: *When processing a Recurring (Element) ACT document for Payroll Deduction purposes, please contact* Instructeam@uab.edu *for step by step instructions.*

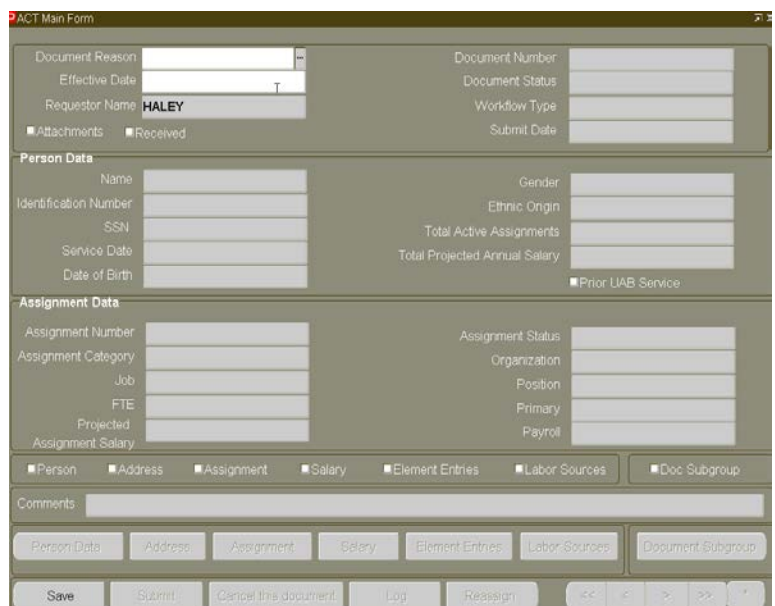**UAB HR Officer → HR Transactions → ACT → Find Window**

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

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

   Note: *The EMPLOYEE ASSIGNMENT window displays when an individual has multiple active assignments. Verify the correct assignment is highlighted before clicking on OK.*

3. The **ACT MAIN FORM** opens; click once in the **DOCUMENT REASON** field.

4. Use the **DOCUMENT REASON LOV** to choose **RECURRING**.

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**.

    *Note: The **EFFECTIVE DATE** of the document must be the beginning of the current pay period or future pay period in which AFR (Average Flat Rate) is to be costed differently than the trainee's assignment level funding.*

6. Click the **Save** button at the bottom of the form. The system will assign a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** will be **OPEN**.

7. Click on the **ELEMENT ENTRIES** button. The **ELEMENT ENTRY** form will open.

The Element Entry form will open and will resemble the illustration to the right.

Note: The **AFR** element automatically populates on the Postdoc Trainee (20) assignment category. By default, the **AFR** element is costed according to the trainee's assignment level funding. In order to cost or re-distribute future AFR charges, the default AFR element must be "*Stopped*" and new costing instructions entered.

8. Click the **STOP** check box; a checkmark will appear.

9. Click in the next available row; click on the **LOV** in the **ELEMENT NAME** field, the **AVERAGE FLAT RATE** element populates along with the document effective date displaying in the **EFFECTIVE START DATE** field.

10. Click in the **EFFECTIVE END DATE** field; enter appropriate end date.

11. Click on the **SAVE** button located at the bottom of the **ELEMENT ENTRY** form.

12. Click on the **ENTRY VALUES** button.
    The **ENTRY VALUES** form will display; the selected **AFR ELEMENT** will display at the top of the form.

13. Enter the correct *AFR* amount in the **FUTURE 1** field.

14. Click the **X** in the upper right corner of the window to save and close the form.

15. Insert comments in the **COMMENTS** box on the **ELEMENT ENTRY** form, if applicable. Click on the **SAVE** button at the bottom of the **ELEMENT ENTRY** form.
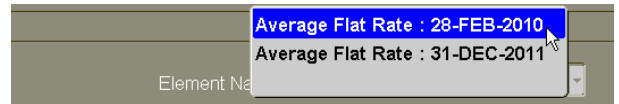
16. Click on the **LABOR SOURCES** button on the **ELEMENT ENTRY** form to enter new costing instructions.

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17. Click on the **drop down arrow** located in the **ELEMENT NAME** box and select the **AVERAGE FLAT RATE** with the appropriate end date.

18. Click in the first available line under the **COSTING** section and proceed with entering applicable costing information.

19. If AFR is to be charged to a GL account, click in the **GL CODE** field.

20. Click on the **LOV**. This opens the **UAB_AKF FIND WINDOW**. Enter *the seven digit account number* (**ALIAS**) or use the **LOV** to perform a search

21. Once the **ALIAS** 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**.

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

24. Type the ***percentage of the element to be charged to this account*** in the **%** field. Only one funding source is allowed for each record/row.

Projected Assignment Salary	42,204.00			Element Name	Average Flat Rate : 28-FEB-...	

Costing

Assignment | Element

Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Org	%
☐	01-SEP-2008	28-FEB-2010	3101699.000.213101699.392300000					100.00
☐								
☐								
☐								
☐								

Comments: Total LD % 100.00

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

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

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

26. Click in the **ATTACHMENTS** check box *if* attachments will be sent to Central HR or Payroll Services.

ACT Main Form

Document Reason	RECURRING	Document Number	462404
Effective Date	01-MAR-2010	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	ELEMENTS
☐ Attachments ☐ Received		Submit Date	

27. Click on the **SUBMIT** button.

28. The **DOCUMENT STATUS** will change to **READY**; the document will enter the Workflow Approval path.

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