Salary Reclass Form

The Salary Reclass Form is used to retroactively redistribute previously posted salary/benefit (CFB) dollars for an employee or fellowship/scholarship dollars for a trainee. Access is restricted to the end users assigned HR Organizational Security.

UAB Salary Reclass > Update Salary Distribution Information > Salary Reclass Form
UAB HR Officer > Update Salary Distribution Information > Salary Reclass Form

The Find Distributions window will load.

Using the LOV in the Employee Name field, the user may search for the employee or may enter the appropriate assignment number in the Assignment field. After entering the employee name or assignment number, press the tab key to populate the employee name or assignment field.

**Note:** Salary/benefit dollars for an employee or fellowship/scholarship dollars for a trainee, are based on the assignment. If the employee has more than one active assignment, the LOV will list all assignments affiliated with the employee.
Select the appropriate period type from the **Period Type** field, based on the employee’s employment and payroll status.

Options include **Biweekly**, **Monthly**, **Quarterly** and **Semi-Annual**.

*Note: Biweekly period type is only available on nonexempt assignments.*

**Quarterly** is no longer a valid period type for departmental end users.

**Semi Annual Periods:** 01OCT – 31MAR and 01APR – 30SEP

Once the period type has been selected, a list of values will load including all applicable options.

Highlight the **appropriate value** and click **OK**.

*Note: A salary reclass cannot be done for a closed period. If the period is closed, it will not be available in the list of values. The **Cost Transfer Form** must be completed to reclassify Salary/benefit dollars for an employee or fellowship/scholarship dollars for a trainee for a closed period.*
The dates will auto populate in the **Find Distributions** window.

For **Biweekly employees only**, the **Adjust by** box allows the user to select the information that is viewable on the salary reclass form. Selecting **Assignment** will cause the funding information to be viewable by the employee’s assignment funding. Selecting **Element** will show all elements used to pay the employee for the selected period. Monthly employees only have the option of viewing the salary reclass form by element.

### Assignment

![Assignment screenshot](attachment:image.png)
Element

Place a check mark in the box (es) beside the line(s) that needs to be adjusted. The Done button will become available.

After marking all applicable lines, click Done.
The funding lines will move to the right side of the form.

On a new line, enter the new **GL Account(s)** *(ASBOF)* or **GA Account(s)** *(PTAOE)*.

The user may select to adjust the funding by amount or percent by clicking the appropriate radio button in the Adjust By box.

*Amount allows the user to make changes using dollar amounts.
*Percent allows the user to make changes based on percentage of funding.
Once the funding amount/percent has been entered, select **Freeze Set**.

The **Unaccounted Balance** must total to zero (0.00).

Select **Submit**

The **Submit** box will display, indicating the **Batch Name**, **GL Override Date**, and **Comments**.

Select **OK**; the document will then enter the electronic approval path.

**Note:** *Multiple elements may be reclassified on the same document by completely adjusting each element line individually. Once the initial element reclassification is complete up to the Freeze Set step, the user may then select another element(s) and follow the same process. Once all elements have been selected and adjusted, the document is ready for submission.*

**Note:** *Once the document has been submitted into the electronic approval path, user may view previously submitted salary reclass documents via the View Salary Distributions by Document menu option available on the HR Officer and UAB Salary Reclass User responsibilities.*