

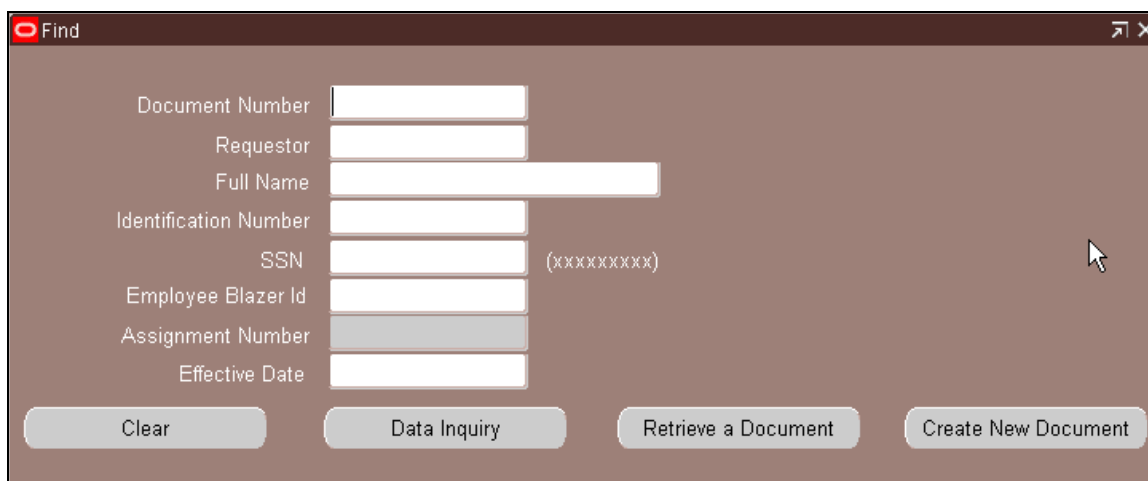
Appoint, Change and Terminate (ACT) Documentation Change of Assignment Category

The **CHANGE OF ASSIGNMENT CATEGORY** document reason is used when an existing employee's **ASSIGNMENT CATEGORY** is changing (*Examples: the employee is going from 03 (Regular Part Time) to 04 (Irregular Part Time) status, or from 04 (Irregular Part Time) to 01 (Full Time Regular) status or vice versa*) **and** the employee will remain in the **same** position number, with the **same** job title. Salary and labor source information **may or may not** be changing.

The **ASSIGNMENT, SALARY, ELEMENT ENTRIES** and **LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields only.

UAB HR Officer → HR Transactions → ACT → Find Window

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



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

Note: After clicking on the **Create New Document** button, another window will display if the employee has more than one assignment. Choose the assignment in which the change in assignment category is taking place.

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

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4. Use the **DOCUMENT REASON** LOV to choose or type the words **Change of Assignment Category** in the **DOCUMENT REASON** field.

Doc_Reason	Doc_Type
ADDITIONAL ASSIGNMENT	HIRE
BUDGET	BUDGET
CHANGE OF ASSIGNMENT CATEGORY	CHANGE
DATA CHANGE	DATA CHANGE
EDUCATION LEAVE WITH PAY	LEAVES
EDUCATION LEAVE WITHOUT PAY	LEAVES
END A TRAINEE	TERMINATION
END A VOLUNTEER	TERMINATION
END ASSIGNMENT	CHANGE
EQUITY INCREASE	CHANGE
FMLA WITH PAY	LEAVES
FMLA WITHOUT PAY	LEAVES
FUNDING SOURCE CHANGE	COSTING CHANGE

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.

ACT Main Form

Document Reason: CHANGE OF ASSIGNMENT

Effective Date: 21-MAR-2011

Requestor Name: HALEY

☐ Attachments ☐ Received

Document Number: []

Document Status: []

Workflow Type: []

Submit Date: []

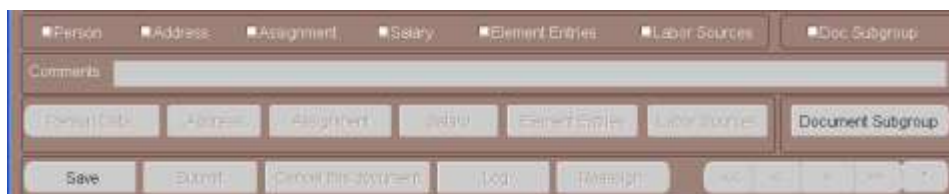
Note: When processing a CHANGE OF ASSIGNMENT CATEGORY document on a biweekly paid employee, the effective date of the document must be on a Sunday. To avoid an employee being over or under paid when processing a CHANGE OF ASSIGNMENT CATEGORY document, verify the payroll schedules before submitting the document. To view biweekly and monthly payroll schedules go to the Financial Affairs webpage.

Copy and paste link into URL:

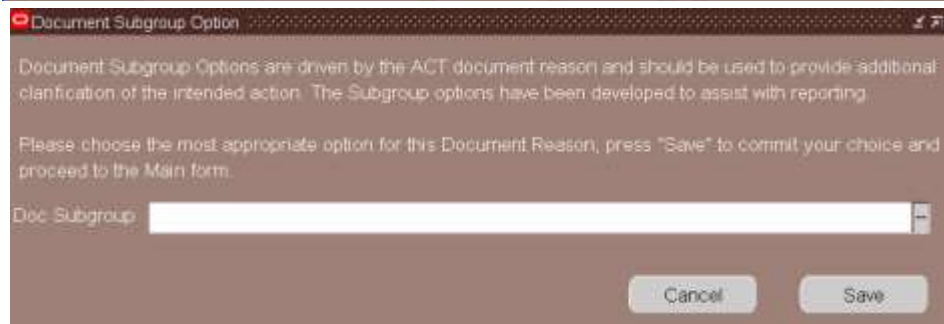
<http://uabcalendar.infomedia.com/ActiveDataCalendar>

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6. Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.

The screenshot shows the top portion of the ACT Main Form. At the top, there are tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the tabs is a Comments text area. A row of buttons includes Personal Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. At the bottom of this section are buttons for Save, Submit, Cancel the Work Item, Lock, and Reassign.

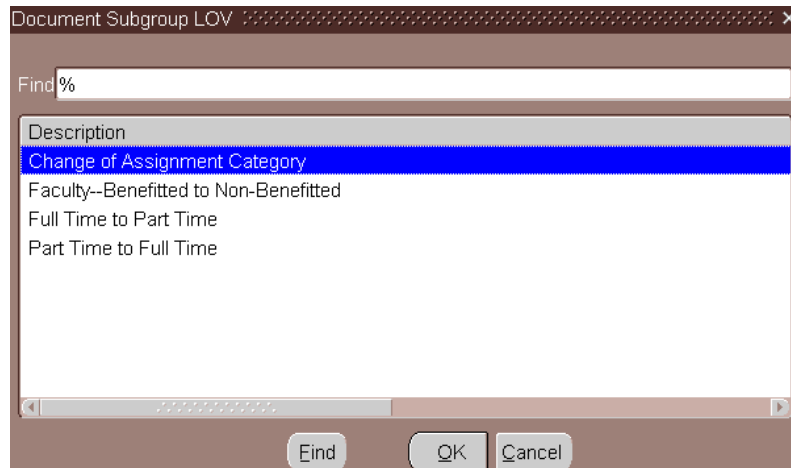
7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc SUBGROUP** field **LOV**.

The screenshot shows the Document Subgroup Option window. It contains a text area with instructions: "Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting. Please choose the most appropriate option for this Document Reason, press 'Save' to commit your choice and proceed to the Main form." Below the text is a Doc Subgroup field with a dropdown arrow. At the bottom right are Cancel and Save buttons.

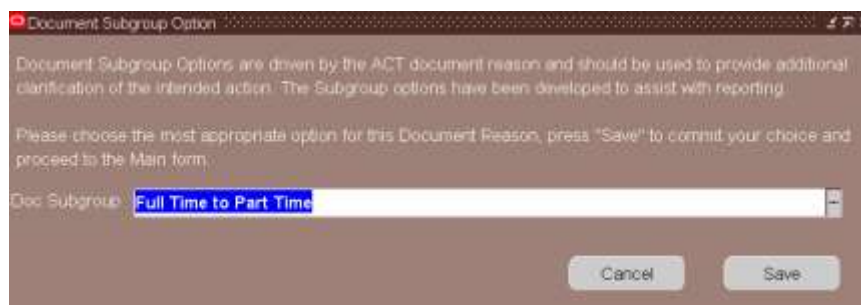
8. Select the description that best explains the nature of the transaction.

For a complete list of available **DOCUMENT SUBGROUP DESCRIPTIONS** and explanation of when to use, click [here](#).

9. Click on **OK** to select.

The screenshot shows the Document Subgroup LOV (List of Values) window. It has a Find % search field at the top. Below is a list box with the following descriptions: "Change of Assignment Category" (which is highlighted in blue), "Faculty--Benefitted to Non-Benefitted", "Full Time to Part Time", and "Part Time to Full Time". At the bottom are End, OK, and Cancel buttons.

10. Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.

The screenshot shows the Document Subgroup Option window again. The Doc Subgroup field now displays "Full Time to Part Time" in blue text. The Cancel and Save buttons are at the bottom right.

Warning: If you change the **DOC SUBGROUP** field after the initial save in step 10, **you must re-save in order to commit your change.**

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

The screenshot shows the 'ACT Main Form' window. The 'Document Reason' is 'CHANGE OF ASSIGNMENT'. The 'Effective Date' is '21-MAR-2011'. The 'Requestor Name' is 'HALEY'. The 'Person Data' section includes fields for Name, Identification Number, SSN, Service Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, and Total Projected Annual Salary. The 'Assignment Data' section includes fields for Assignment Number, Assignment Category, Job, FTE, Projected Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll. The 'Save' button is located at the bottom left of the form.

Changing Assignment Information

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

The screenshot shows the 'ACT Main Form' window with populated data. The 'Document Reason' is 'CHANGE OF ASSIGNMENT'. The 'Effective Date' is '13-MAR-2011'. The 'Requestor Name' is 'HALEY'. The 'Person Data' section includes fields for Name (Example, Sheila Good), Identification Number (1044893), SSN (789-65-4123), Service Date (19-NOV-2007), Date of Birth (02-SEP-1948), Gender (Female), Ethnic Origin (White), Total Active Assignments (1), and Total Projected Annual Salary (34,320.00). The 'Assignment Data' section includes fields for Assignment Number (1044893), Assignment Category (01 Regular FT), Job (CG204N2, Office Assoc II), FTE (1), Projected Assignment Salary (34,320.00), Assignment Status (Active Assignment), Organization (352006000 Nutrition Scienci), Position (352006000.21304.101121), Primary (Y), and Payroll (Biweekly). The 'ASSIGNMENT' button is highlighted in the bottom navigation bar.

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2. The **ASSIGNMENT CATEGORY** field will be yellow; select the appropriate category from the LOV or type it in the field.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		03 Regular PT
Status	Active Assignment		
Expected Return Date			
Organization	352006000 Nutrition Sciences Edu		
Location	Bham Main Campus		
Position	352006000.21304.101121		
Job	CG204N2.Office Assoc II		
Grade	W.G11		
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method	TEL		
Timekeeping Organization			
Comments			

Note: The **ASSIGNMENT CATEGORY** field under the **PROPOSED** column is a required field. The **PROPOSED ASSIGNMENT CATEGORY** field must be different from the **CURRENT ASSIGNMENT CATEGORY** field when using the **Change Assignment Category** document reason.

3. The **LOCATION**, **PAYROLL GROUP**, and all three **TIMEKEEPING** fields are available for change or update if necessary. Click the **SAVE** button.
4. Click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

For instructions on how to change **salary information**, [click here](#).

For instructions on how to change **labor source information**, [click here](#).

To proceed with submitting the **Change of Assignment Category** document, [click here](#).

Appoint, Change and Terminate (ACT) Documentation

Change of Assignment Category

Changing Salary Information

1. To change the salary information, click on the **SALARY** button, located either on the **ACT MAIN FORM**.

2. Click in the **SALARY BASIS** field; enter the correct **Salary Basis information**.

3. Click in the **REASONS** field located at the top of the form, select the appropriate reason from the LOV or type in **Assignment Category Change**.

Component Reasons	
Reason	Change Value

	Current	Proposed
Projected Assignment Salary	34,320.00	
Actual Assignment Rate of Pay	16.50	
FTE	1.00	
Hosp Code		
Premium Plan	NA	NA
Salary Basis	Hourly	
Payroll	Biweekly	
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments		

4. Enter the **change value in monthly rate** (*for a salaried employee only*) in the **CHANGE VALUE** field. When you enter this information, the **PROJECTED ASSIGNMENT SALARY** and the **ACTUAL ASSIGNMENT RATE OF PAY** will automatically populate.
5. Enter the new **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.
6. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click **SAVE**.
7. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

For instructions on how to change **labor source information**, [click here](#).

To proceed with submitting the **Change of Assignment Category** document, [click here](#).

Appoint, Change and Terminate (ACT) Documentation Change of Assignment Category

Changing Labor Source Information

1. If the labor sources are changing for the employee, click on the **LABOR SOURCES** button located at the bottom of the **ASSIGNMENT FORM** or from the **ACT MAIN FORM**.

Labor Sources (Create New Document)

Full Name: **Example, Sheisa Good** Document Reason: **CHANGE OF ASSIGNMENT CATEG**
 Identification Number: **1044893** Document Number: **536151**
 Assignment Number: **1044893** Document Status: **OPEN**
 Effective Date: **13-MAR-2011**

Projected Assignment Salary: **34,320.00** Element Name:

Costing

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current LD	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	28-SEP-2008		2101364.000.123500000.35200600					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: Total LD %: **100.00**

Return to Previous Form Save

Note: When entering a new GL or GA funding source, the current labor source which is changing, must be stopped. Click in the STOP checkbox located to the left of each funding source ending or changing before entering the new funding source. An employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key on the keyboard to move cursor to the next available row.

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 **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.

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Change of Assignment Category

- 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: 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.
 - a. 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.
 - b. 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.

To proceed with submitting the **Change of Assignment Category** document, [click here](#).

Appoint, Change and Terminate (ACT) Documentation Change of Assignment Category

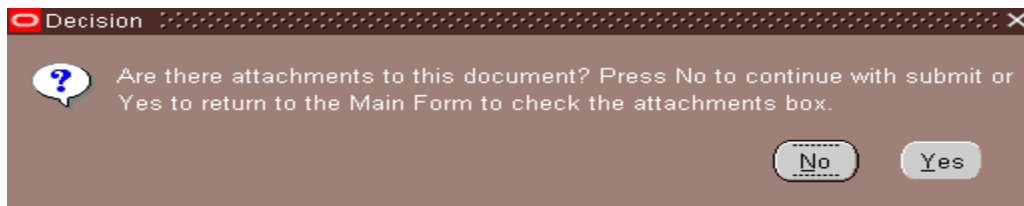
Submitting the Change of Assignment Category Document

1. From the **ACT MAIN FORM**, click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. [Click here](#) for a listing of attachments required by Records Administration.



The screenshot shows the 'ACT Main Form' window. It contains several fields: 'Document Reason' is 'CHANGE OF ASSIGNMENT', 'Effective Date' is '13-MAR-2011', 'Requestor Name' is 'HALEY', 'Document Number' is '636151', 'Document Status' is 'OPEN', 'Workflow Type' is 'CHANGE', and 'Submit Date' is empty. At the bottom left, there are two checkboxes: 'Attachments' (checked) and 'Received' (unchecked). An arrow points from the 'Attachments' checkbox to the text 'Click here' in the first step of the instructions.

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.



The screenshot shows a 'Decision' dialog box with a question mark icon. The text inside says: 'Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.' At the bottom right, there are two buttons: 'No' and 'Yes'.

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**.

[RETURN TO TOP](#)