

## 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.

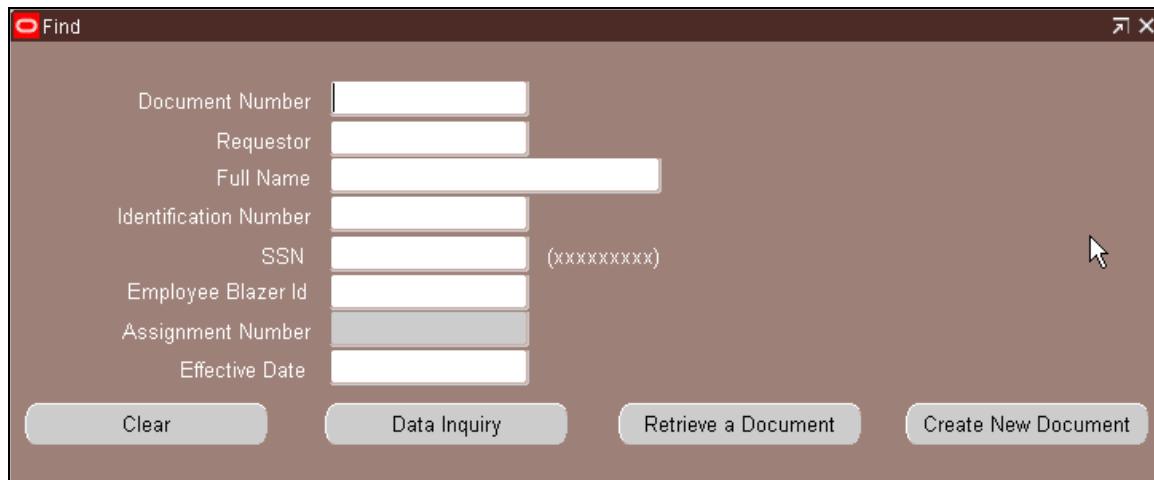
The **ASSIGNMENT**, **SALARY**, **ELEMENT ENTRIES** and **LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields only.

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

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



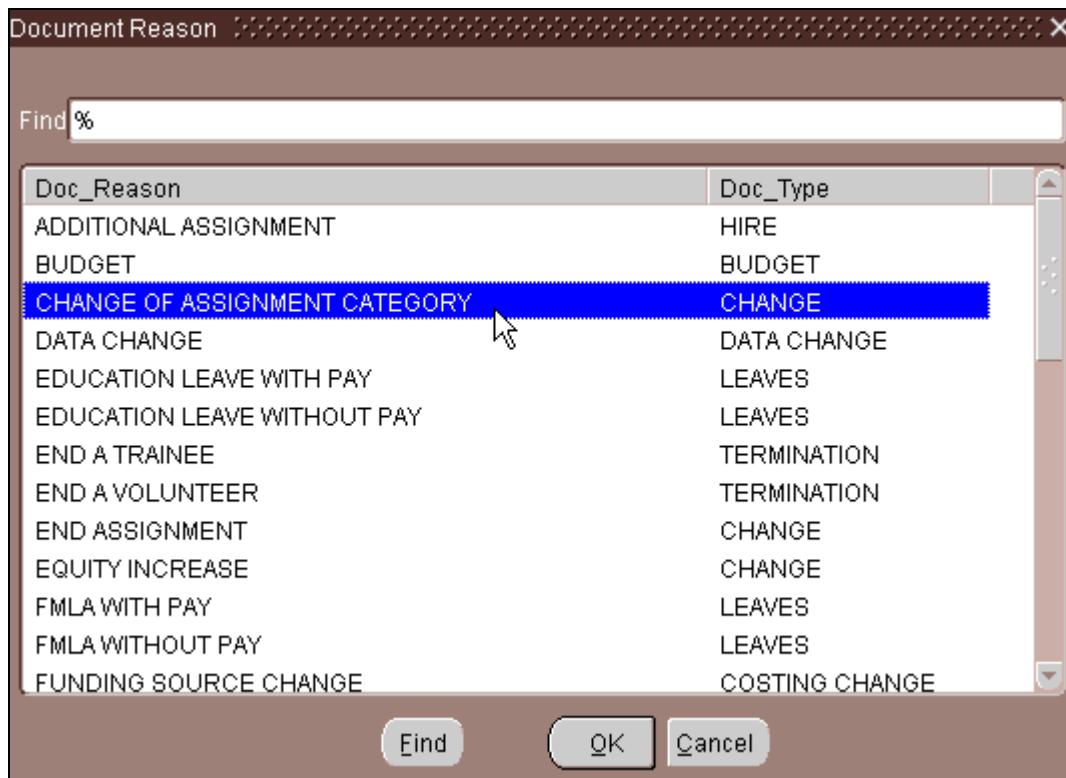
2. Click on the **CREATE NEW DOCUMENT** button.

***Note: 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.



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.



**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**.

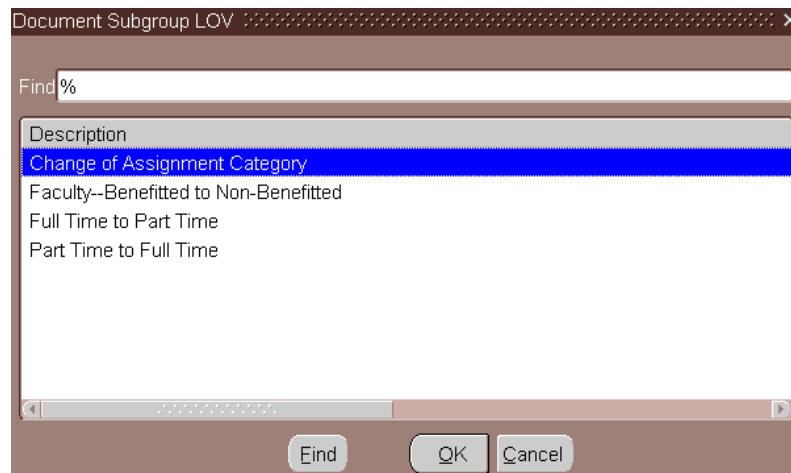


7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc Subgroup** field LOV.

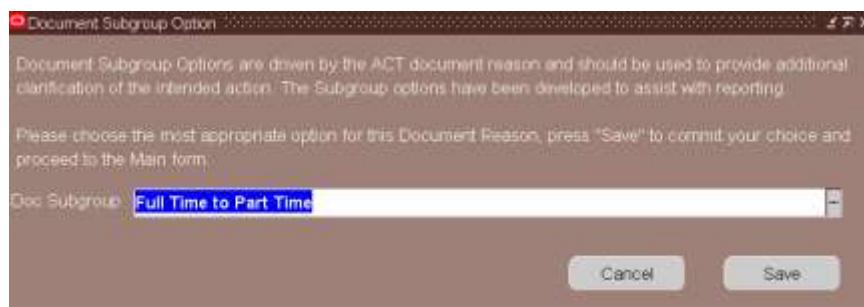
8. Select the description that best explains the nature of the transaction.

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

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



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



**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**.

ACT Main Form

Document Reason: CHANGE OF ASSIGNMENT

Effective Date: 21-MAR-2011

Requestor Name: HALEY

Attachments: Received

Person Data

Name: Example, Sheila Good

Identification Number: 1044893

SSN: 789-65-4123

Service Date: 19-NOV-2007

Date of Birth: 02-SEP-1949

Gender: Female

Ethnic Origin: White

Total Active Assignments: 1

Total Projected Annual Salary: 34,320.00

Prior UAB Service:

Assignment Data

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 Science

Position: 352006000.21304.101121

Primary: Y

Payroll: Biweekly

Comments:

Person Data | Address | Assignment | Salary | **Comments** | Labor Sources | Document Subgroup

Save | Cancel this document | Log | Reassign | Print | Export | Help | Exit

### Changing Assignment Information

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

ACT Main Form

Document Reason: CHANGE OF ASSIGNMENT

Effective Date: 13-MAR-2011

Requestor Name: HALEY

Attachments: Received

Person Data

Name: Example, Sheila Good

Identification Number: 1044893

SSN: 789-65-4123

Service Date: 19-NOV-2007

Date of Birth: 02-SEP-1949

Gender: Female

Ethnic Origin: White

Total Active Assignments: 1

Total Projected Annual Salary: 34,320.00

Prior UAB Service:

Assignment Data

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 Science

Position: 352006000.21304.101121

Primary: Y

Payroll: Biweekly

Comments:

Person Data | Address | Assignment | Salary | **Comments** | Labor Sources | Document Subgroup

Save | Cancel this document | Log | Reassign | Print | Export | Help | Exit

## Appoint, Change and Terminate (ACT) Documentation

### Change of Assignment Category

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	<input type="text"/>	

[Return to Previous Form](#) [Save](#)

***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

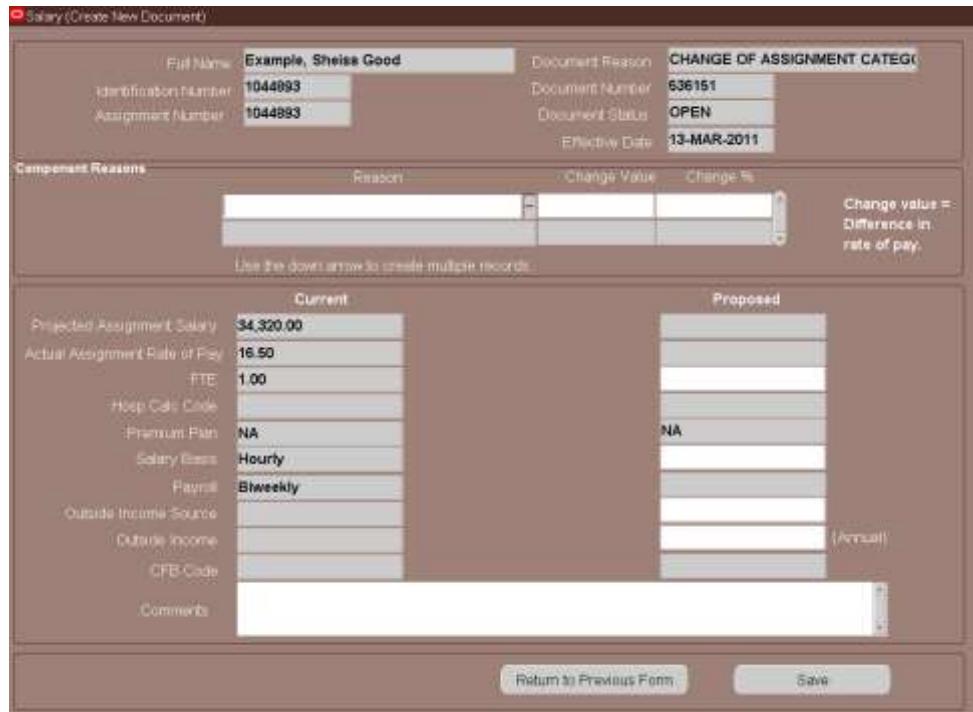
### Change of Assignment Category

#### 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**.



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**.

LD	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<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"/>									

**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.

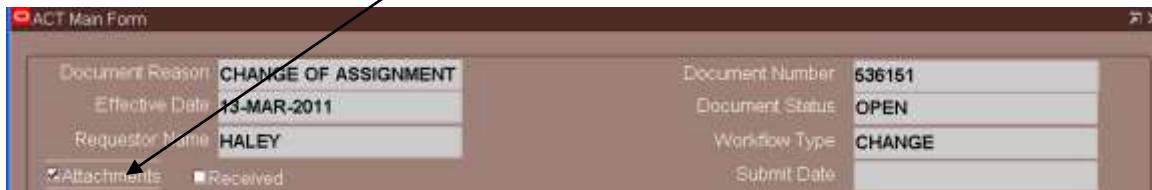
To proceed with submitting the ***Change of Assignment Category*** document, [\*\*click here.\*\*](#)

## 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.



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**.

[\*\*RETURN TO TOP\*\*](#)