Appoint, Change and Terminate (ACT) Documentation
Processing an Education Leave Document with pay and without pay

The following documentation explains how to process an Educational Leave of Absence where a portion of the leave period is with pay and a portion of the leave period is without pay.

**Scenario:** Amy Buckle has been approved an Educational Leave of Absence beginning October 01, 2009 through May 31, 2010. Amy has sufficient accrued benefit time to remain in a paid status through December 31, 2009. Amy Buckle will enter into a non-paid status effective January 1, 2010; she anticipates returning to work June 1, 2010.

If an employee has accrued benefit time available, an *Education Leave with Pay ACT Document (Step One)* must be created for the period of time in which the employee is to receive pay. Once the employee’s accrued benefit time has been exhausted, the employee will no longer receive a paycheck from UAB and must be placed in a “non-paid status”. An *Education Leave without Pay Document (Step Two)* must be created for the duration of the leave of absence.

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

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**Step One: Creating the Education with Pay Document**

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

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

3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.

4. Use the **DOCUMENT REASON LOV** to choose **EDUCATION LEAVE WITH PAY** or type the words **Education Leave with Pay** in the **DOCUMENT REASON** field.
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5. Click inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the *desired date*. Remember to use the **DD-MM-YYYY** format.

6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The Administrative System will automatically generate a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** field will be **OPEN**.

7. Click on the **ASSIGNMENT** button from the **ACT MAIN FORM**. The **ASSIGNMENT FORM** will open.

8. Click in the **EXPECTED RETURN DATE** field. Enter the date the employee will enter into a “non-paid status” using the calendar LOV.

**Note:** This date is determined by adding the employee’s benefit time accrual balances and updates the employee will receive during the with pay portion of the leave of absence. Once all accrued and earned benefit time has been paid, the employee will enter a “non-paid” status.

9. Enter similar comment in the **COMMENTS** field at the bottom of the **ASSIGNMENT** form. Comments entered here will appear on the **ACT MAIN FORM**.

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**Note:** Inserting a comment when the employee will be entering a non-pay status, will alert HRM Records Administration an Education Leave without pay document will be submitted once the Education Leave with pay document is “Complete”.

10. Click on the **SAVE** button at the bottom of the **ASSIGNMENT** form.

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

12. Click in the **ATTACHMENT** box; a **Checkmark** will appear. **Attachments are required for Leave of Absence documents. For a list of attachments required by HRM Records Administration, click here.**

13. A **check mark** now appears in the **ASSIGNMENT CHECKBOX**, indicating a change has been entered on the **ASSIGNMENT** form.

14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**.

15. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.

16. Once the document is approved by all approval levels; the document status changes to “**COMPLETE**”.

Proceed onto: **Step Two: Creating the FMLA without Pay Document**.
Step Two: Creating an Education Leave without Pay Document

1. Use the FIND WINDOW to locate the employee.

2. Click on the CREATE NEW DOCUMENT button.

3. The ACT MAIN FORM will open. Click once in the DOCUMENT REASON field.

4. Use the DOCUMENT REASON LOV to choose FMLA WITHOUT PAY or type the words FMLA without Pay in the DOCUMENT REASON field.

5. Click inside the EFFECTIVE DATE field, choose an effective date from the Calendar LOV or type in the desired date. Remember to use the DD-MM-YYYY format.

Note: The EFFECTIVE DATE of the EDUCATION LEAVE WITHOUT PAY document will be the same as the EXPECTED RETURN DATE on the EDUCATION LEAVE WITH PAY document.
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6. Click on the SAVE button at the bottom of the ACT MAIN FORM. The Administrative System will automatically generate a DOCUMENT NUMBER and the DOCUMENT STATUS field will be OPEN.

7. Click on the ASSIGNMENT button from the ACT MAIN FORM. The ASSIGNMENT FORM will open.

![Assignment Form]

**Notice:** The CURRENT STATUS field displays LEAVE WITH PAY indicating the employee is in a “pay status”; this document will move the employee into a “non-paid status” as displayed in the PROPOSED STATUS field LEAVE WITHOUT PAY.

8. Click in the EXPECTED RETURN DATE field. Enter the employee’s expected return to work date using the calendar LOV. The EXPECTED RETURN DATE should be the projected date the employee will actually be returning to work.

![Assignment Form]

**Note:** Entering the date in the EXPECTED RETURN DATE field does not automatically return the employee from leave. You will need to process a Return from Leave document before the employee will be returned to a “Pay Status”. The employee will not be paid until the Return from Leave document is in “Complete” status.

9. Enter Comments, if applicable, in the COMMENTS field at the bottom of this form. Comments entered here will appear on the ACT MAIN FORM.

10. Click on the SAVE button.

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

12. Click in the ATTACHMENT box; a check mark will appear. Attachments are required for all Medical Leave of Absence documents. For a list of attachments required by HRM Records Administration, click here.

![ACT Main Form]

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13. A check mark now appears in the ASSIGNMENT CHECKBOX, indicating a change has been entered on the ASSIGNMENT form.

![Assignment Form]

14. Click on the SUBMIT button at the bottom of the ACT MAIN FORM. The following NOTE appears. Click OK.

![Note]

15. Print the ACT MAIN FORM; attach to the front of attachments to be forwarded to HRM Records Administration for approval.

16. The DOCUMENT STATUS field changes to READY; the document enters workflow for approval.

![ACT Main Form]

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