

Appoint, Change and Terminate (ACT) Documentation Education without Pay

The **EDUCATION WITHOUT PAY** document reason is used when the employee does not have sufficient accrued vacation and personal holiday time to remain in a “pay status” for the approved educational leave of absence.

When using the **EDUCATION WITHOUT PAY** document reason, the **ACT MAIN FORM** and the **ASSIGNMENT FORM** are the only forms you will be able to access.

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.
3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field
4. Use the **DOCUMENT REASON LOV** to choose **EDUCATION WITHOUT PAY** or type the words **Education 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.

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- 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**.

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (EDUCATION LEAVE WITHO...), Effective Date (01-JAN-2009), Requestor Name (HALEY), Document Number (447830), Document Status (OPEN), Workflow Type (LEAVES), and Submit Date.
- Person Data:** Name (Example, One), Gender (Female), Identification Number (1007011), Ethnic Origin (White), SSN, Service Date (30-JUN-1986), Date of Birth (14-JUN-1968), Total Active Assignments (1), Total Projected Annual Salary (xx,xxx.xx), and Prior UAB Service checkbox.
- Assignment Data:** Assignment Number (1007011), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (311401800 Med - Preventive), Job (CG204N2.Office Assoc II), Position (311401800.06701.031001), FTE (1), Primary (Y), Projected Assignment Salary (xx,xxx.xx), and Payroll (Monthly).
- Navigation and Comments:** A row of checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below is a Comments text area and a row of buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup.
- Bottom Bar:** Buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

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

The screenshot shows the 'General Assignment Information' form, which is split into two columns: 'Current' and 'Proposed'.

- Current Column:** Assignment Category (01 Regular FT), Status (Active Assignment), Expected Return Date, Organization (311401800 Med - Preventive Medi), Location (Bham Main Campus), Position (311401800.06701.031001), Job (CG204N2.Office Assoc II), Grade (W.G11), Payroll Group (Staff 12), Timecard Dist Number, Timekeeping Method, and Timekeeping Organization.
- Proposed Column:** Leave Without Pay (highlighted in yellow), and several empty fields for other information.
- Bottom Bar:** Buttons for Salary, Labor Sources, Element Entries, Return to Previous Form, and Save.

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- Click in the **EXPECTED RETURN DATE** field. Enter the expected return date for the employee using the calendar LOV.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		Leave Without Pay
Expected Return Date			01-JUN-2009
Organization	311401800 Med - Preventive Medi		
Location	Bham Main Campus		
Position	311401800.06701.031001		
Job	CG204N2.Office Assoc II		
Grade	W.G11		
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			

Note: *Entering the Expected Return Date does not automatically return the employee from leave. **A RETURN FROM LEAVE DOCUMENT MUST BE PROCESSED BEFORE THE EMPLOYEE WILL BE RETURNED TO AN ACTIVE STATUS.***

- Enter comments, if applicable, in the **COMMENTS** field at the bottom of the **ASSIGNMENT** form. Comments entered here will appear on the **ACT MAIN FORM**.
- Click on the **SAVE** button at the bottom of the **ASSIGNMENT** form.
- Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
- Click in the **ATTACHMENT** box;

a **Checkmark** will appear.

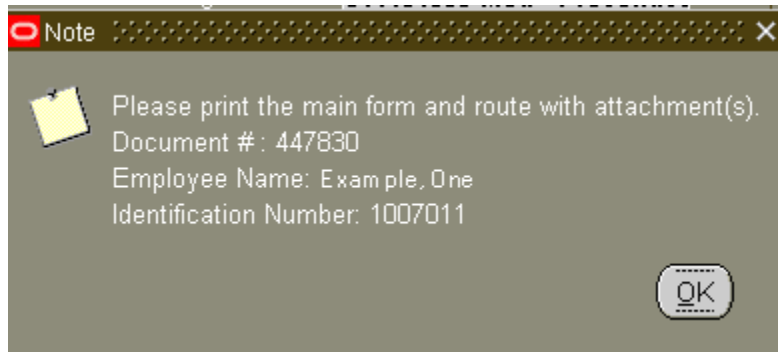
Attachments are required for Educational Leave of Absence documents. For a list of attachments required by Records Administration, [click here](#).

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

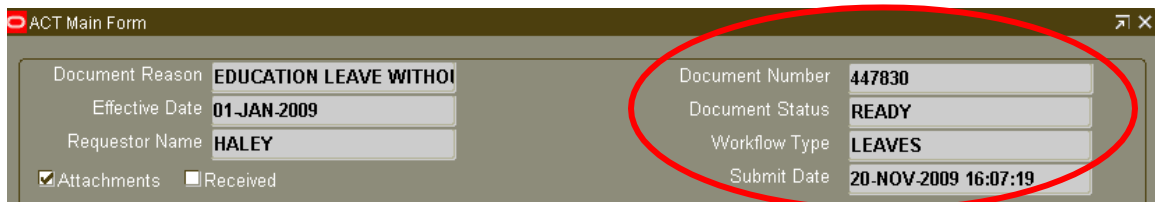
<input type="checkbox"/> Person	<input type="checkbox"/> Address	<input checked="" type="checkbox"/> Assignment	<input type="checkbox"/> Salary	<input type="checkbox"/> Element Entries	<input type="checkbox"/> Labor Sources	<input type="checkbox"/> Doc Subgroup
Comments						
Person Data	Address	Assignment	Salary	Element Entries	Labor Sources	Document Subgroup
Save	Submit	Cancel this document	Log	Reassign	<< < > >> *	

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- Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** is going to appear. Then click **OK**.



- Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to HRM Records Administration for approval.
- The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.



A screenshot of the 'ACT Main Form' window. The form contains the following fields:

Document Reason	EDUCATION LEAVE WITHOI	Document Number	447830
Effective Date	01-JAN-2009	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	20-NOV-2009 16:07:19

The 'Document Number', 'Document Status', 'Workflow Type', and 'Submit Date' fields are circled in red.

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