

## Appoint, Change and Terminate (ACT) Documentation Processing an FMLA Document with pay and without pay

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

**Scenario:** *Ima Really Goode Sr. has been approved for a Family Medical Leave of Absence effective July 5, 2011 through August 28, 2011 to care for his wife during her illness. He has enough accrued benefit time to be paid through July 31, 2011. He will return to work on August 29, 2011.*

If an employee has accrued benefit time available, a **FMLA with Pay Document (Step One)** must be created for the period of time in which the employee will receive pay. Once the employee's accrued benefit time is exhausted, the employee will no longer receive a paycheck from UAB and must be placed in a "non-paid status". A **FMLA without Pay Document (Step Two)** must be created for the duration of the FMLA leave of absence.

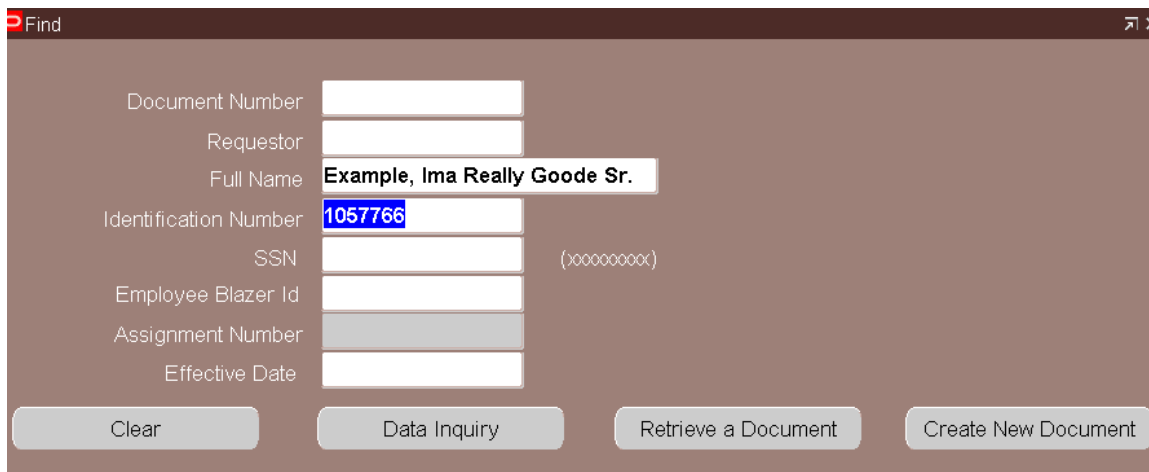
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UAB HR Officer → HR Transactions → ACT → Find Window

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### **Step One: Creating the FMLA 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.
4. Click once in the **DOCUMENT REASON** field. Use the **DOCUMENT REASON LOV** to choose **FMLA WITH PAY** or type the words **FMLA with Pay** in the **DOCUMENT REASON** field.

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- 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-MMM-YYYY** format.
- 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 input fields:
 

- Document Reason: FMLA WITH PAY
- Effective Date: 05-JUL-2011
- Requestor Name: HALEY
- Document Number: 536196
- Document Status: OPEN
- Workflow Type: LEAVES
- Submit Date: (empty)

 There are also checkboxes for 'Attachments' and 'Received'.

This screenshot shows the bottom section of the ACT Main Form. It includes a 'Comments' text area and a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. Below these are action buttons: 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign', followed by 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. It is divided into 'Current' and 'Proposed' sections.
 

- Current:** Assignment Category: 01 Regular FT; Status: Active Assignment; Expected Return Date: (empty).
- Proposed:** Assignment Category: (empty); Status: Leave With Pay; Expected Return Date: (empty).

 An arrow points from the 'Assignment' button in the previous screenshot to the 'Proposed' section.

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

This screenshot is similar to the previous one, but the 'Expected Return Date' field in the 'Proposed' section now contains the date '01-AUG-2011'.

**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.

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

The screenshot shows the 'Comments' text area at the bottom of the Assignment form. The text entered is: 'Will be placed on FMLA without pay beginning 01-Aug-2011'. Below the text area are two buttons: 'Return to Previous Form' and 'Save'.

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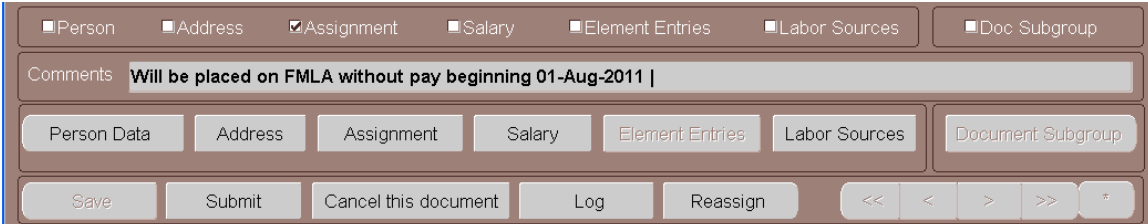
**Note:** inserting a comment when the employee will be entering a non-pay status, will alert HRM Records Administration a **FMLA without pay document** will be submitted once the **FMLA with pay document** is “Complete”.

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 all Medical Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**



The screenshot shows the 'ACT Main Form' window. It contains several input fields: Document Reason (FMLA WITH PAY), Effective Date (05-JUL-2011), Requestor Name (HALEY), Document Number (536196), Document Status (OPEN), Workflow Type (LEAVES), and Submit Date. A checkbox labeled 'Attachments' is checked and circled in red. There is also an unchecked 'Received' checkbox.

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



The screenshot shows the 'ACT Main Form' window with the 'Assignment' checkbox checked. The 'Comments' field contains the text: 'Will be placed on FMLA without pay beginning 01-Aug-2011 |'. Below the comments field are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

13. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**. Print the **ACT MAIN FORM**; attach to the front of attachments being routed to HRM Records Administration for approval.

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

Once the **FMLA WITH PAY** document is in a “**COMPLETE**” status, proceed onto:  
**Step Two: Creating the FMLA without Pay Document.**

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### Step Two: Creating the FMLA 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 and effective date from the Calendar LOV or type in the **desired date**. Remember to use the **DD-MM-YYYY** format.

**Notice: EFFECTIVE DATE of Document and CURRENT EXPECTED RETURN DATE are the same date.**

**Note: The EFFECTIVE DATE of the FMLA WITHOUT PAY document will be the same as the EXPECTED RETURN DATE on the FMLA with Pay document.**

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**.

**Note: ASSIGNMENT STATUS field currently displays the employee in a "Leave with Pay" status.**

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

**Note:** 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**.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Leave With Pay		Leave Without Pay
Expected Return Date	01-AUG-2011		

- 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.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Leave With Pay		Leave Without Pay
Expected Return Date	01-AUG-2011		29-AUG-2011

**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.

- Enter Comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
- Click on the **SAVE** button.
- Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
- Click in the **ATTACHMENT** box if attachments are required; a **check mark** will appear. **For a list of attachments required by HRM Records Administration, [click here](#).**

ACT Main Form			
Document Reason	FMLA WITHOUT PAY	Document Number	536197
Effective Date	01-AUG-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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

## Appoint, Change and Terminate (ACT) Documentation Processing an FMLA Document with pay and without pay

The screenshot shows the ACT main form interface. At the top, there are tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. The 'Assignment' tab is selected and circled in red. Below the tabs is a 'Comments' field. Underneath are buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. At the bottom of the form are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows (left, right, and a plus sign).

14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**.
15. Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to Records Administration for approval.
16. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.

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