

Appoint, Change and Terminate (ACT) Documentation Creating a Merit Increase ACT Document

The **Merit Increase** document reason is used when processing salary increases based upon performance or achievement at a time period other than October 1 of the fiscal year.

The **Merit Increase Document Effective Date** will be determined by University or Hospital Administration. Salary and effective date guidelines will be dispersed to appropriate departments as necessary. Guidelines addressing exceptions or Fixed Increment Payments will also be dispersed to departments as necessary.

When creating a **Merit Increase** ACT document, you should only have to change the **SALARY** form. However, the **LABOR SOURCES** form is open for update in case the funds will be coming from another source.

- When changing an employee's **LABOR SOURCE** on a **Merit Increase** document, the effective date of the **Merit Increase** document **must be a future pay period**.
- When processing a **Merit Increase** document with a **retroactive** effective date (a date in which the payroll has already processed), you **will be allowed to change** the employee's Labor Source; however, the effective date of the labor source change will default to the next available pay period. **In order to correct the labor source for past pay periods, you will need to complete the Salary Reclass Form.**
- If you need to change an employee's Labor Source **prior** to the **Merit Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Merit Increase** document.
- Once an employee's **Merit Increase** document has entered "COMPLETE", a **Funding Source Change Document** with an effective date prior to the **Merit Increase** **may not be created**.

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 you click on the Create New Document button you might see another window pop up. Some employees may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.

Find

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	Example, One
Identification Number	1013787
SSN	(xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	1013787
Effective Date	<input type="text"/>

Clear Data Inquiry Retrieve a Document Create New Document

- The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.
- Use the **DOCUMENT REASON LOV** to choose or type the words **Merit Increase** in the **DOCUMENT REASON** field.

A screenshot of the ACT MAIN FORM. The Document Reason field is set to "MERIT INCREASE". The Effective Date field is empty. The Requestor Name field is set to "CFWILSON". There are checkboxes for Attachments and Received. The Document Number, Document Status, Workflow Type, and Submit Date fields are empty.

- 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-MM-YYYY** format.

A screenshot of the ACT MAIN FORM. The Document Reason field is set to "MERIT INCREASE". The Effective Date field is set to "01-DEC-2012". The Requestor Name field is set to "CFWILSON". There are checkboxes for Attachments and Received. The Document Number, Document Status, Workflow Type, and Submit Date fields are empty.

- All Bi-Weekly paid employees must have Merit Increase documents dated on a Sunday for payroll purposes.**
- All Monthly paid employees must have Merit Increase documents dated from the beginning of the month.**

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

A screenshot of the ACT MAIN FORM showing the bottom section. There are tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the tabs is a Comments field. 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.

DOCUMENT NUMBER now displays and the document is in **OPEN** status.

A screenshot of the ACT MAIN FORM. The Document Reason field is set to "MERIT INCREASE". The Effective Date field is set to "01-DEC-2012". The Requestor Name field is set to "CFWILSON". The Document Number field is set to "650241". The Document Status field is set to "OPEN". The Workflow Type field is set to "CHANGE". There are checkboxes for Attachments and Received. The Submit Date field is empty.

- Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.

The screenshot shows the top navigation bar of the ACT MAIN FORM. The 'Salary' button is highlighted with a mouse cursor. Other buttons include 'Person Data', 'Address', 'Assignment', 'Element Entries', 'Labor Sources', 'Document Subgroup', 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

- Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.

The screenshot shows the 'Component Reasons' section of the salary form. The 'Reason' field is highlighted with a red circle. The 'Change Value' and 'Change %' fields are also visible. A note on the right states 'Change value = Difference in rate of pay.' and a footer note says 'Use the down arrow to create multiple records.'

The screenshot shows the 'Component Reason' dropdown menu. The options are 'Award of Tenure', 'Equity Adjustment', and 'Merit Increase'. 'Merit Increase' is selected and highlighted in blue. The menu has 'Find %' at the top and 'End', 'OK', and 'Cancel' buttons at the bottom.

- Select **MERIT INCREASE** from the **LOV** in **REASON** field.

- Click in the **CHANGE VALUE** field; enter the hourly increase amount for biweekly paid employees or the monthly increase amount for salaried employees.

Example: If an hourly paid employee currently earns \$10.00 per hour and will increase to \$11.25 per hour, enter **\$1.25**. If a monthly paid employee currently earns \$4,354.17 per month and will increase to \$4,500.00 per month, enter **\$145.83**.

Note: You may also enter a percentage change in the **CHANGE %** field instead of an amount in the **CHANGE VALUE** field.

The screenshot shows the 'Component Reasons' section with the following data entered: Reason: Merit Increase, Change Value: 1.25, Change %: 6.04. Red arrows point to the Reason and Change % fields. The same note about 'Change value = Difference in rate of pay.' and 'Use the down arrow to create multiple records.' is present.

- The **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered based upon the new rate of pay.

	Current	Proposed
Projected Assignment Salary	52,250.00	54,000.00
Actual Assignment Rate of Pay	4,354.17	4,500.00

- 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.

If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a **Merit Increase** document, [click here](#).

If the employee's Labor Source information must be changed proceed on to step 16.

15. If the labor sources are changing for an employee, click on the **LABOR SOURCES** button on the **ACT MAIN FORM**.

16. The **LABOR SOURCES** form opens.

Projected Assignment Salary: xxx,xxx.xx Element Name: [dropdown]

Costing

Assignment: [tab] Element: [tab]

Current LD	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-SEP-2005			3100654.000.213100654.114301000					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: [text area]

Total LD %: 100.00

Return to Previous Form Save

Entering GL Funding Sources

Note: If you are entering new GL or GA information for an employee, you must stop the other labor sources by clicking in the **STOP** checkbox located to the left of each funding source before entering new ones.

Projected Assignment Salary **xx,xxx.xx** Element Name

Costing

Assignment Element

Current	LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
			From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		01-SEP-2005		3100654.000.213100654.114301000					100.00
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									

Comments: Total LD % **.00**

17. If an employee has a GL funding source and this information is changing, click in the **GL CODE** field.

Costing

Assignment Element

Current	LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
			From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>		01-OCT-2005		<input type="text" value=""/>					
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									

Comments: Total LD % **.00**

18. Click on the LOV. This opens the **UAB_AKF FIND WINDOW**.

UAB_AKF

ALIAS

19. Click on the LOV icon in the **ALIAS** field.
20. Enter **the new funding source account number** or use the **% WILD CARD** to perform a search. Enter as much information as possible to limit your search.
21. Once the new account number is entered, click on the **OK** button. The **UAB_AKF** window will open displaying the account string.

UAB_AKF

ACCOUNT 2100669 MAINTENANCE-CAMPUS
 SUBACCOUNT 000 DEFAULT SUBACCOUNT
 BALANCING 110100000 CENTRAL GEN OPER FDS
 ORGANIZATION 112302000 CAMPUS MAINTENANCE
 FUTURE 0000 DEFAULT
 OBJECT [] ...

OK Cancel Combinations Clear Help

22. Type "0" zero in the **OBJECT** field. Click **OK**.

23. The **LABOR SOURCES** form opens displaying the account string information in the **GL CODE** field.

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
ID	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005		2100669.000.110100000.112302000			→		

24. Type in the *percent of the employee's effort to be charged to this account* in the % field. Only one funding source is allowed for each record/row.

comments:

Total LD % 100.00

Note: TOTAL LD% must equal 100% before you can save the document.

25. Repeat the above steps, as needed, for entering all GL account funding sources.

Entering Grant Funding Sources

26. If an employee is funded from a grant and this information is changing, click once in the **PROJECT** field of the next available row.

Assignment Salary: 43,200.00
Element Name: [Dropdown]
Costing

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005							
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: Total LD % 100.00

- Choose the **project number** from the LOV in the **PROJECT** field or **type the grant number in the field**.
- Choose the **task number** from the LOV in the **Task** field or **type the number into the field**.
- Choose the **award number** from the LOV in the **AWARD** field or **type the number into the field**.
- Choose the **organization number** from the LOV in the **EXPENDITURE ORGANIZATION** field or type **the number into the field**. For the hospital, this number is **70**. For the university, the number is **10**.

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005	31-MAY-2006		223252	01.01	1523252	10	

27. Type in **the percent of the employee's effort to be charged to this account** in the **%** field. Only one funding source is allowed for each record/row.

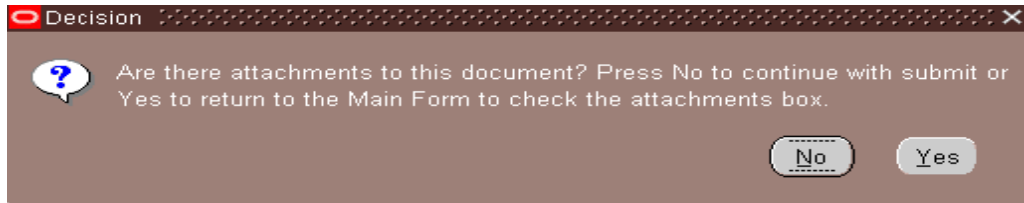
Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: Total LD % 100.00

Note: TOTAL LD% must equal 100% before you can save the document.

28. Repeat the above steps, as needed, for entering all Grant funding sources.

29. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
30. Click on the **SAVE** button.
31. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
32. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
33. Once the document is submitted the following window appears.



34. Click **No** to continue since **ATTACHMENTS** are not required.
35. 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).*

36. Once the **Merit Increase** 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**](#)