

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

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

**Scenario:** Ms. Anniston is on a Personal Leave of Absence effective July 01, 2006 through Sept. 30, 2006. Ms. Anniston has enough accrued benefit time to be paid through August 19, 2006. Ms. Anniston will return to work on Oct. 1, 2006.

Accrued personal holiday and vacation time must be paid at the beginning of the personal leave of absence before entering a “non-paid status”. When an employee has accrued benefit time available, a **Personal Leave with Pay ACT 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 to be placed in a “non-paid status”. A **Personal Leave without Pay ACT document (Step Two)** must be created for the duration of the personal leave of absence.

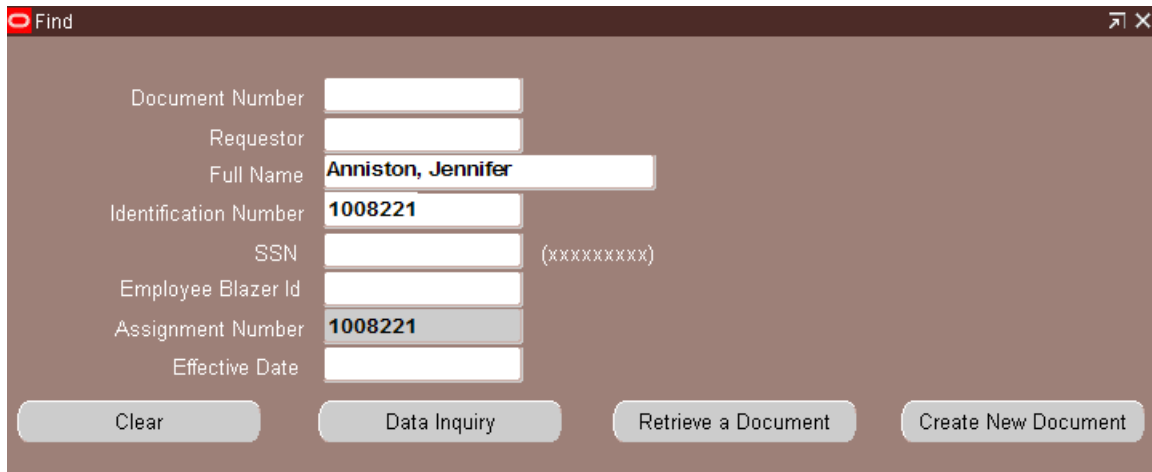
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**UAB HR Officer → HR Transactions → ACT → Find Window**

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### **(Step One): Creating a Personal Leave without Pay Document.**

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



Document Number

Requestor

Full Name

Identification Number

SSN

Employee Blazer Id

Assignment Number

Effective Date

Clear Data Inquiry Retrieve a Document Create New Document

2. Click on the **CREATE NEW DOCUMENT** button.
3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

The screenshot shows the 'ACT Main Form' with the following fields and options:

- Document Reason: [Empty]
- Effective Date: [Empty]
- Requestor Name: **HALEY**
- Document Number: [Empty]
- Document Status: [Empty]
- Workflow Type: [Empty]
- Submit Date: [Empty]
- Attachments  Received

**Person Data**

- Name: [Empty]
- Gender: [Empty]
- Identification Number: [Empty]
- Ethnic Origin: [Empty]
- SSN: [Empty]
- Total Active Assignments: [Empty]
- Service Date: [Empty]
- Total Projected Annual Salary: [Empty]
- Date of Birth: [Empty]
- Prior UAB Service

**Assignment Data**

- Assignment Number: [Empty]
- Assignment Status: [Empty]
- Assignment Category: [Empty]
- Organization: [Empty]
- Job: [Empty]
- Position: [Empty]
- FTE: [Empty]
- Primary: [Empty]
- Projected Assignment Salary: [Empty]
- Payroll: [Empty]

Person  Address  Assignment  Salary  Element Entries  Labor Sources

Comments: [Empty]

Person Data | Address | Assignment | Salary | Element Entries | Labor Sources

Save | Submit | Cancel this document | Log | Reassign | << | < | > | >> | +

- Use the **DOCUMENT REASON LOV** to choose **PERSONAL LEAVE WITH PAY** or type the words **Personal Leave with Pay** in the **DOCUMENT REASON** field.

The screenshot shows the 'ACT Main Form' with the following fields and options:

- Document Reason: **PERSONAL LEAVE WITH P/**
- Effective Date: [Empty]
- Requestor Name: **HALEY**
- Document Number: [Empty]
- Document Status: [Empty]
- Workflow Type: [Empty]
- Submit Date: [Empty]
- Attachments  Received

- 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.

The screenshot shows the 'ACT Main Form' with the following fields and options:

- Document Reason: **PERSONAL LEAVE WITH P/**
- Effective Date: **01-JUL-2006**
- Requestor Name: **HALEY**
- Document Number: [Empty]
- Document Status: [Empty]
- Workflow Type: [Empty]
- Submit Date: [Empty]
- Attachments  Received

- 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**.

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

**ACT Main Form**

Document Reason: **PERSONAL LEAVE WITH P/**  
 Effective Date: **01-JUL-2006**  
 Requestor Name: **HALEY**

Document Number: **205346**  
 Document Status: **OPEN**  
 Workflow Type: **LEAVES**

Attachments  Received

**Person Data**

Name: **Anniston, Jennifer** Gender: **Female**  
 Identification Number: **1024444** Ethnic Origin: **White / Non Hispanic**  
 SSN:   
 Service Date: **01-AUG-1990** Total Active Assignments: **1**  
 Date of Birth: **21-AUG-1960** Total Projected Annual Salary: **xx,xxx.xx**  
 Prior UAB Service

**Assignment Data**

Assignment Number: **1024444** Assignment Status: **Active Assignment**  
 Assignment Category: **01 Regular FT** Organization: **702500000 Cardiovascular S**  
 Job: **HN134E0.Clin Nurse Spec** Position: **702500000.00214.031001**  
 FTE: **1** Primary: **Y**  
 Projected Assignment Salary: **xx,xxx.xx** Payroll: **Monthly**

Person  Address  Assignment  Salary  Element Entries  Labor Sources

Comments:

<< < > >> \*

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

**Assignment (Retrieve a Document)**

Full Name: **Anniston, Jennifer** Document Reason: **PERSONAL LEAVE WITH PAY**  
 Identification Number: **1024444** Document Number: **205346**  
 Assignment Number: **1024444** Document Status: **OPEN**  
 Effective Date: **01-JUL-2006**

Effective Date From: **01-APR-2006** Shift Differential Code: **NA**  
 Effective Date To: **31-DEC-4712** Grandparented:   
 Primary: **Y** Effort Report Eligible: **No**

**General Assignment Information**

Current	Proposed
Assignment Category: <b>01 Regular FT</b>	
Status: <b>Active Assignment</b>	<b>Leave With Pay</b>
Expected Return Date:	
Organization: <b>702500000 Cardiovascular Service</b>	
Location: <b>Bham Main Campus</b>	
Position: <b>702500000.00214.031001</b>	
Job: <b>HN134E0.Clin Nurse Spec</b>	
Grade: <b>W.G17</b>	
Payroll Group: <b>Staff 12</b>	
Timecard Dist Number:	
Timekeeping Method:	
Timekeeping Organization:	
Comments:	

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

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		Leave With Pay
Expected Return Date			20-AUG-2006

**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.**

9. 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**.
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 **check mark** will appear. **Attachments are required for Personal Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**

**ACT Main Form**

Document Reason	PERSONAL LEAVE WITH PA	Document Number	205346
Effective Date	01-JUL-2006	Document Status	OPEN
Requester Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

**Person Data**

Name	Anniston, Jennifer	Gender	Female
Identification Number	1024444	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Service Date	01-AUG-1990	Total Projected Annual Salary	xx,xxx.xx
Date of Birth	21-AUG-1960	<input type="checkbox"/> Prior UAB Service	

**Assignment Data**

Assignment Number	1024444	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	702500000 Cardiovascular S
Job	HN134E0.Clin Nurse Spec	Position	702500000.00214.031001
FTE	1	Primary	Y
Projected Assignment Salary	xx,xxx.xx	Payroll	Monthly

Person   
  Address   
  Assignment   
  Salary   
  Element Entries   
  Labor Sources

Comments

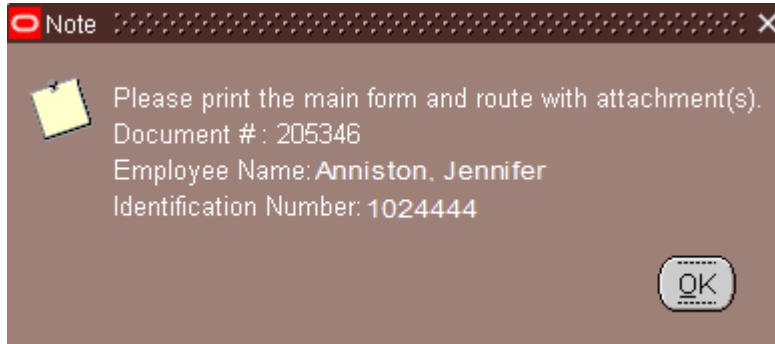
  
    
    
    
    

  
    
    
    
    
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13. A **check mark** now appears in the **ASSIGNMENT CHECKBOX**, indicating a change has been entered on the **ASSIGNMENT** form.

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

- 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 to be forwarded to HRM Records Administration for approval.
- The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.

ACT Main Form

Document Reason	PERSONAL LEAVE WITH PAY	Document Number	205346
Effective Date	01-JUL-2006	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	31-JUL-2006 14:51:42

- Once the **PERSONAL LEAVE WITH PAY** document is approved through the Workflow Approval Path the Document Status changes to **COMPLETE**

ACT Main Form

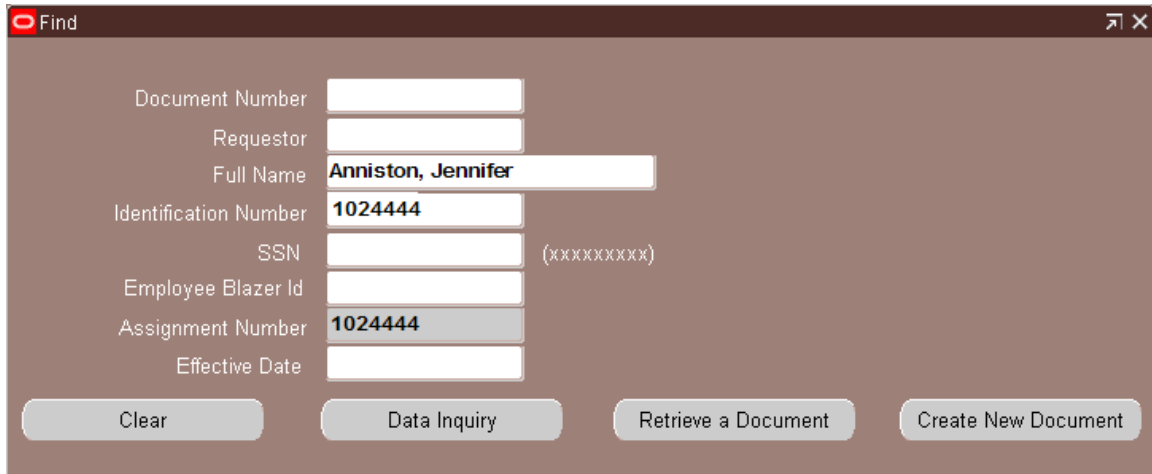
Document Reason	PERSONAL LEAVE WITH PAY	Document Number	205346
Effective Date	01-JUL-2006	Document Status	COMPLETE
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	31-JUL-2006 14:51:42

Proceed onto **Step Two: Creating a Personal Leave without Pay Document.**

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

### Step Two: Step Two: Creating a Personal Leave without Pay Document.

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



Find

Document Number

Requestor

Full Name **Anniston, Jennifer**

Identification Number **1024444**

SSN  (xxxxxxxx)

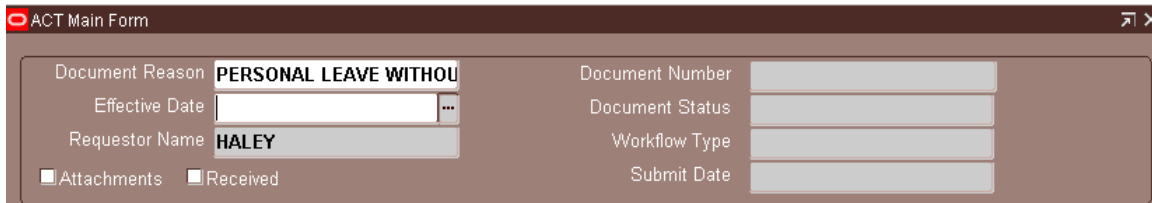
Employee Blazer Id

Assignment Number **1024444**

Effective Date

Clear Data Inquiry Retrieve a Document Create New Document

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 **PERSONAL LEAVE WITHOUT PAY** or type the words **Personal Leave without Pay** in the **DOCUMENT REASON** field.



ACT Main Form

Document Reason **PERSONAL LEAVE WITHOU**

Effective Date

Requestor Name **HALEY**

Document Number

Document Status

Workflow Type

Submit Date

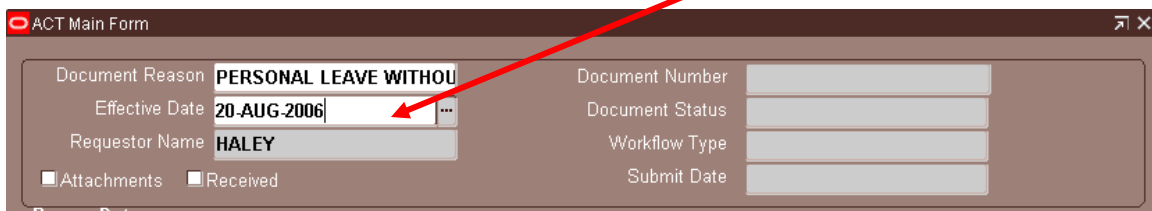
Attachments  Received

5. Click inside the **EFFECTIVE DATE** field. The effective date will be the date entered in the **EXPECTED RETURN DATE** field on the **PERSONAL LEAVE WITH PAY** document. Remember to use the **DD-MM-YYYY** format.



General Assignment Information

	Current	Proposed
Assignment Category	<b>01 Regular FT</b>	<input type="text"/>
Status	<b>Active Assignment</b>	<b>Leave With Pay</b>
Expected Return Date	<b>20-AUG-2006</b>	<b>20-AUG-2006</b>



ACT Main Form

Document Reason **PERSONAL LEAVE WITHOU**

Effective Date **20-AUG-2006**

Requestor Name **HALEY**

Document Number

Document Status

Workflow Type

Submit Date

Attachments  Received

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

- 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 displays the 'ACT Main Form' interface. It is divided into several sections: Document Information, Person Data, Assignment Data, and a bottom navigation bar. The 'Document Information' section includes fields for Document Reason (PERSONAL LEAVE WITHOU), Effective Date (20-AUG-2006), Requestor Name (HALEY), Document Number (205359), Document Status (OPEN), Workflow Type (LEAVES), and Submit Date. The 'Person Data' section includes Name (Anniston, Jennifer), Gender (Female), Identification Number (1024444), Ethnic Origin (White / Non Hispanic), SSN, Service Date (01-AUG-1990), Date of Birth (21-AUG-1960), Total Active Assignments (1), and Total Projected Annual Salary (xx,xxx.xx). The 'Assignment Data' section includes Assignment Number (1024444), Assignment Category (01 Regular FT), Job (HN134E0.Clin Nurse Spec), FTE (1), Projected Assignment Salary (xx,xxx.xx), Assignment Status (Leave With Pay), Organization (702500000 Cardiovascular S), Position (702500000.00214.031001), Primary (Y), and Payroll (Monthly). A red box highlights the 'Assignment Status' field. Below the form are checkboxes for Person, Address, Assignment, Salary, Element Entries, and Labor Sources, a Comments field, and a navigation bar with buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

Document Reason	PERSONAL LEAVE WITHOU	Document Number	205359
Effective Date	20-AUG-2006	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	LEAVES
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

**Person Data**

Name	Anniston, Jennifer	Gender	Female
Identification Number	1024444	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Service Date	01-AUG-1990	Total Projected Annual Salary	xx,xxx.xx
Date of Birth	21-AUG-1960	<input type="checkbox"/> Prior UAB Service	

**Assignment Data**

Assignment Number	1024444	Assignment Status	Leave With Pay
Assignment Category	01 Regular FT	Organization	702500000 Cardiovascular S
Job	HN134E0.Clin Nurse Spec	Position	702500000.00214.031001
FTE	1	Primary	Y
Projected Assignment Salary	xx,xxx.xx	Payroll	Monthly

Person  Address  Assignment  Salary  Element Entries  Labor Sources

Comments

Person Data Address Assignment Salary Element Entries Labor Sources

Save Submit Cancel this document Log Reassign << < > >> \*

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

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

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

Assignment (Create New Document)

Full Name	Anniston, Jennifer	Document Reason	PERSONAL LEAVE WITHOUT PAY
Identification Number	1024444	Document Number	205359
Assignment Number	1024444	Document Status	OPEN
		Effective Date	20-AUG-2006

Effective Date From	01-JUL-2006	Shift Differential Code	NA
Effective Date To	31-DEC-4712	Grandparented	
Primary	Y	Effort Report Eligible	No

General Assignment Information	
Current	Proposed
Assignment Category	01 Regular FT
Status	Leave With Pay
Expected Return Date	20-AUG-2006
Organization	702500000 Cardiovascular Service
Location	Bham Main Campus
Position	702500000.00214.031001
Job	HN134E0.Clin Nurse Spec
Grade	W.G17
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	

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

**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.

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

General Assignment Information	
Current	Proposed
Assignment Category	01 Regular FT
Status	Leave Without Pay
Expected Return Date	01-OCT-2006
Organization	702500000 Cardiovascular Service

**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.



## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

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](#).**

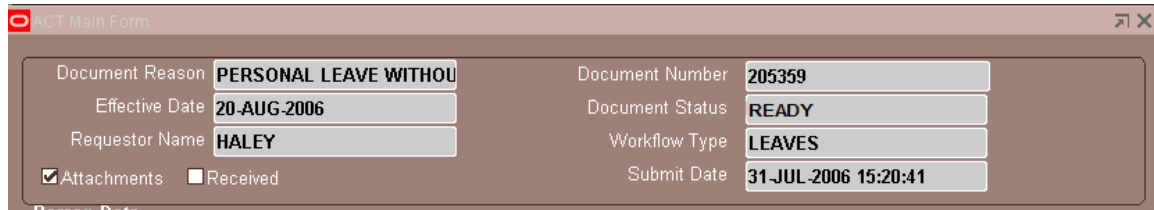
The screenshot shows the 'ACT Main Form' window. The 'Document Reason' is 'PERSONAL LEAVE WITHOU' and the 'Document Number' is '205359'. The 'Effective Date' is '20-AUG-2006' and the 'Document Status' is 'OPEN'. The 'Requester Name' is 'HALEY'. The 'Attachments' checkbox is checked and circled in red. The 'Person Data' section includes Name 'Anniston, Jennifer', Gender 'Female', Identification Number '1024444', Ethnic Origin 'White / Non Hispanic', SSN, Total Active Assignments '1', Service Date '01-AUG-1990', Total Projected Annual Salary 'xx,xxx.xx', and Date of Birth '21-AUG-1960'. The 'Assignment Data' section includes Assignment Number '1024444', Assignment Status 'Leave With Pay', Assignment Category '01 Regular FT', Organization '702500000 Cardiovascular S', Job 'HN134E0.Clin Nurse Spec', Position '702500000.00214.031001', FTE '1', Primary 'Y', Projected Assignment Salary 'xx,xxx.xx', and Payroll 'Monthly'. The 'Assignment' checkbox is checked and circled in red. The 'Comments' field is empty. The bottom of the form has buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. At the very bottom are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

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**. The following **NOTE** appears. Click **OK**.

The screenshot shows a 'Note' dialog box with a yellow notepad icon. The text inside reads: 'Please print the main form and route with attachment(s). Document #: 205359 Employee Name: Anniston, Jennifer Identification Number: 1024444'. There is an 'OK' button at the bottom right.

## Appoint, Change and Terminate (ACT) Documentation Processing a Personal Leave of Absence with pay and without pay

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.



The screenshot shows a web-based form titled "ACT Main Form". The form contains the following fields and values:

Document Reason	PERSONAL LEAVE WITHOU	Document Number	205359
Effective Date	20-AUG-2006	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	31-JUL-2006 15:20:41

[RETURN TO TOP](#)