

Appoint, Change and Terminate (ACT) Documentation Probationary Increase

The **PROBATIONARY INCREASE** document reason is used to process a salary increase for an employee after completion of the initial six (6) months (probationary period) of employment with the University. A probationary increase is given **at the discretion of the employee's department according to departmental policies**.

A **PROBATIONARY INCREASE** document usually requires changing the **salary information** only. However, the **LABOR SOURCES** form is available for change or update.

- When changing an employee's **LABOR SOURCE** information on a **Probationary Increase** document, the effective date of the **Probationary Increase** document **must be a future pay period**.
- When processing a **Probationary 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 information; however, the effective date of the labor source change will default to the next available pay period. **In order to correct the labor source information for past pay periods, you will need to complete the Salary Reclass Form**.
- If you need to change an employee's Labor Source information **prior** to the **Probationary Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Probationary increase** document.
- Once an employee's **Probationary Increase** document has entered "**COMPLETE**", a **Funding Source Change Document with** an effective date prior to the **Probationary 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.

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

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ACT Main Form

Document Reason: **PROBATIONARY INCREASE**

Effective Date: []

Requestor Name: **HALEY**

Document Number: []

Document Status: []

Workflow Type: []

Submit Date: []

Attachments Received

5. 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-MMM-YYYY** format.

Note: The Document Effective Date for all bi-weekly paid employees receiving a Probationary Increase must be the beginning of a pay period. The Document Effective Date for all monthly paid employees must be the beginning of the month.

6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**.
7. Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.
8. Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.

Component Reasons

Reason	Change Value	Change %
[]	[]	[]

Use the down arrow to create multiple records.

Change value = Difference in rate of pay.

9. Select **PROBATIONARY INCREASE** from the LOV or type the information in the **REASON** field. Click **OK**.

Component Reason

Find % []

Component Reason
Equity Adjustment
Merit Increase
Probationary Increase

Find OK Cancel

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10. 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 \$3,300.00 per month and will increase to \$3,600.00 per month, enter **\$300.00**.

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

Component Reasons	Reason	Change Value	Change %	
	Probationary Increase	150.00	3.05	Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

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

	Current	Proposed
Assignment Salary	59,000.04	60,800.04
Assignment Rate Pay	4,916.67	5,066.67

12. If processing a **Probationary Increase** document for a **UAB Hospital** employee, click in the **HOSP CALC CODE** field and select **B** from the listing.
13. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
14. Click on the **SAVE** button.
15. Click on the **RETURN TO PREVIOUS FORM** button.
16. If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a **Probationary Increase** document, [click here](#).
17. If the employee's Labor Source information must be changed proceed onto [Changing Labor Source Information](#).

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Changing Labor Source Information

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

ACT Main Form

Document Reason: **PROBATIONARY INCREASE** Document Number: **422934**
 Effective Date: **27-SEP-2009** Document Status: **OPEN**
 Requestor Name: **HALEY** Workflow Type: **CHANGE**
 Attachments Received Submit Date: _____

Person Data

Name: **Example, One B** Gender: **Female**
 Identification Number: **1050664** Ethnic Origin: **White**
 SSN: _____ Total Active Assignments: **1**
 Service Date: **02-MAR-2009** Total Projected Annual Salary: **xx,xxx.xx**
 Date of Birth: **26-APR-1966** Prior UAB Service

Assignment Data

Assignment Number: **1050664** Assignment Status: **Active Assignment**
 Assignment Category: **12 Three 12-Hour Shifts** Organization: **706250000 Nursing Services**
 Job: **HN010N0.Registered Nurse** Position: **706250000.71901.080610**
 FTE: **.9** Primary: **Y**
 Projected Assignment Salary: **xx,xxx.xx** Payroll: **Biweekly**

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments: _____

Person Data Address Assignment Salary Element Entries **Labor Sources** Document Subgroup

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

The **LABOR SOURCES** form opens.

Assignment Salary: **60,800.04** 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 type="checkbox"/>	19-DEC-2005	3101067.000.213101067.311401000					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"/>							

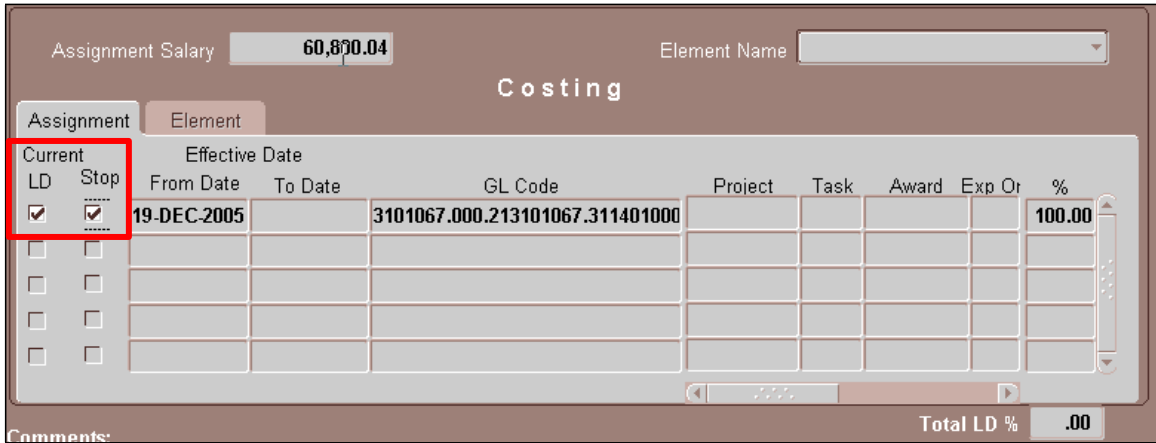
Comments: _____

Total LD % **100.00**

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Entering GL Funding Sources

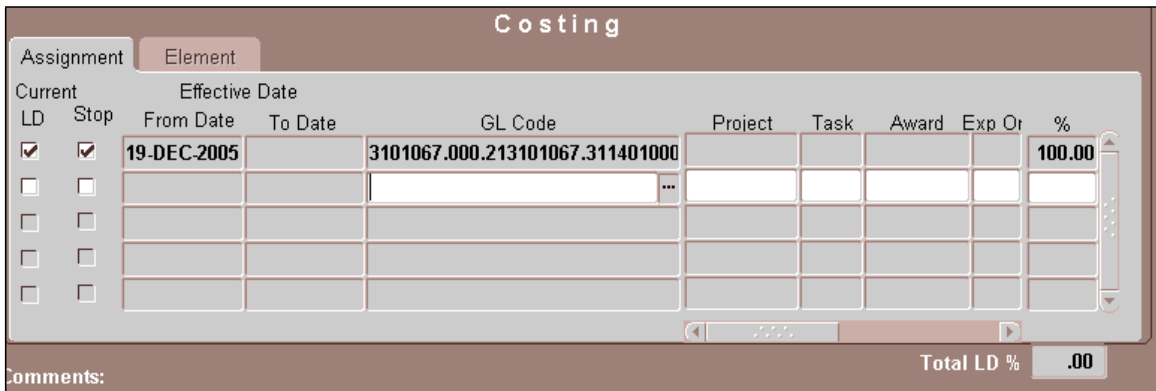
Note: If you are entering new GL or GA information for an employee, you must stop the other labor sources by clicking in the **STOP** checkbox located to the left of each funding source before entering new ones.



The screenshot shows the 'Costing' window with 'Assignment Salary' set to 60,800.04 and 'Element Name' as a dropdown. The 'Assignment' tab is active. A table lists funding sources with columns for 'Current', 'LD', 'Stop', 'Effective Date', 'GL Code', 'Project', 'Task', 'Award', 'Exp Or', and '%'. The first row is selected, with 'LD' and 'Stop' checkboxes checked. The 'GL Code' field contains '3101067.000.213101067.311401000'. The 'Total LD %' at the bottom right is .00.

Current	LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005	3101067.000.213101067.311401000					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"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

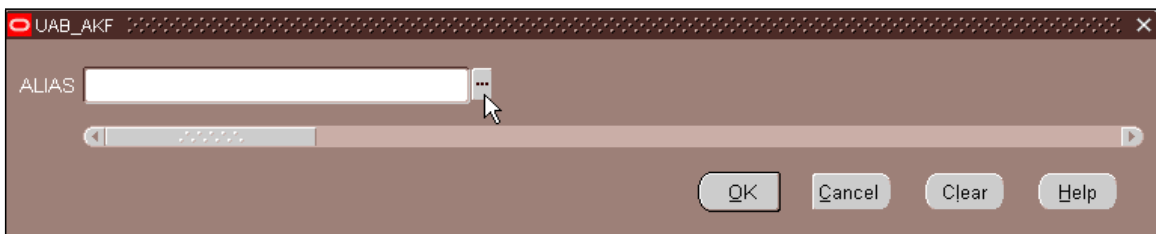
2. If an employee has a GL funding source and this information is changing, click in the **GL CODE** field.



The screenshot shows the 'Costing' window with the 'GL CODE' field in the second row highlighted. The 'LD' and 'Stop' checkboxes for the first row are checked. The 'Total LD %' at the bottom right is .00.

Current	LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005	3101067.000.213101067.311401000					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"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

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



The screenshot shows the 'UAB_AKF FIND WINDOW' with an 'ALIAS' field and a dropdown arrow. The window has 'OK', 'Cancel', 'Clear', and 'Help' buttons at the bottom.

4. Enter **the new funding source account number** or use LOV to locate the correct account number.

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Note: When using the ALIAS LOV, use the % WILD CARD to perform a search. Enter as much information as possible to limit your search.

- Once the new account number is entered, click on the **OK** button. The **UAB_AKF** window will open displaying the account string.

The screenshot shows the UAB_AKF window with the following fields filled in:

- ACCOUNT: 3101123
- SUBACCOUNT: 000
- BALANCING: 213101123
- ORGANIZATION: 310000000
- FUTURE: 0000
- OBJECT: (empty)

Buttons at the bottom: OK, Cancel, Combinations, Clear, Help.

- Type **"0" zero** in the **OBJECT** field. Click **OK**.
- The **LABOR SOURCES** form opens displaying the account string information in the **GL CODE** field.

The screenshot shows the Costing form with the following table:

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005		3101067.000.213101067.311401000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006		3101123.000.213101123.310000000					
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Total LD %: .00

- 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.

The screenshot shows the Costing form with the following table:

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

Total LD %: 100.00

Note: The Total LD % must total 100% before you can submit the document.

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

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Entering Grant Funding Sources

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

The screenshot shows the 'Costing' form with the following data in the table:

Current	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<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"/>							

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**.

The screenshot shows the 'Costing' form with the following data in the table:

Current	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<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	

Comments: Total LD % 100.00

20. 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.

The screenshot shows the 'Costing' form with the following data in the table:

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

Comments: Total LD % 100.00

Note: The Total LD % must total 100% before you can submit the document.

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

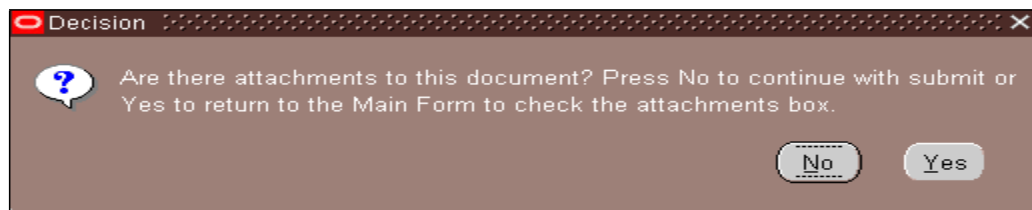
22. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

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23. Click on the **SAVE** button.
24. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

Submitting the Document

1. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



3. Click **No** to continue since **ATTACHMENTS** are not required.
4. 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).

5. Once the **Probationary 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**.

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