

Appoint, Change and Terminate (ACT Documentation) Promotion Same Department

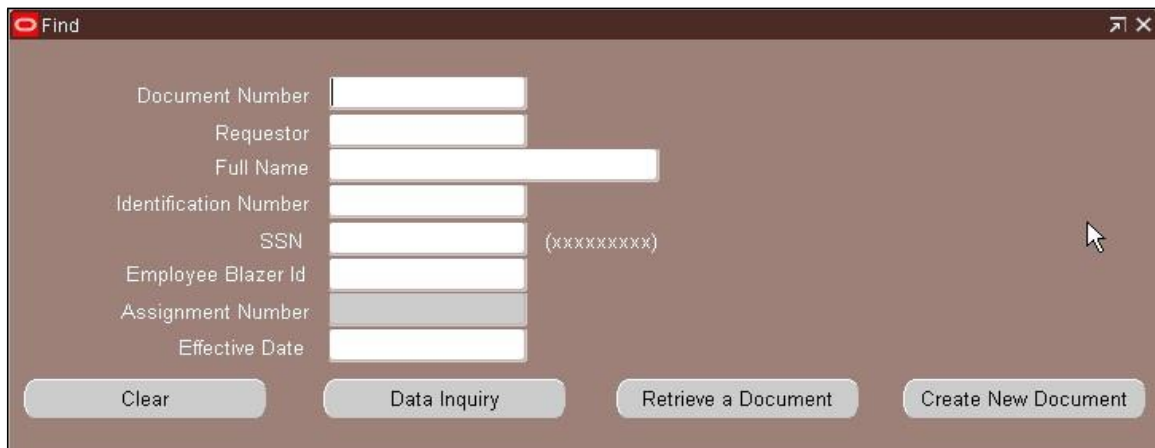
The **PROMOTION SAME DEPARTMENT** Document Reason is used when an employee changes to a job classification that is a **higher pay grade** than their current job classification **within the same department**. The **position number, job title** and **job grade must** change using this document reason. If the position number is not changing, use the **RECLASSIFICATION** document reason. For instructions on creating a **RECLASSIFICATION** document, [click here](#).

Used when a Faculty member is promoted in faculty rank in the same organization or when Staff is promoted to Full-time Faculty.

The **ASSIGNMENT, SALARY, and LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields.

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.

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ACT Main Form

Document Reason [Dropdown] Document Number [Text]
Effective Date [Text] Document Status [Text]
Requestor Name: **HALEY** Workflow Type [Text]
Submit Date [Text]

Attachments Received

4. Use the **DOCUMENT REASON** LOV to choose or type the words **Promotion Same Department** in the **DOCUMENT REASON** field.

Document Reason

Find %

Doc_Reason	Doc_Type
NONRECURRING ELEMENT	ELEMENTS
OJI LEAVE WITH PAY	LEAVES
OJI LEAVE WITHOUT PAY	LEAVES
OJIFAMILY MEDICAL LEAVE	LEAVES
PERSONAL LEAVE WITH PAY	LEAVES
PERSONAL LEAVE WITHOUT PAY	LEAVES
PROBATIONARY INCREASE	CHANGE
PROMOTION SAME DEPARTMENT	CHANGE
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES

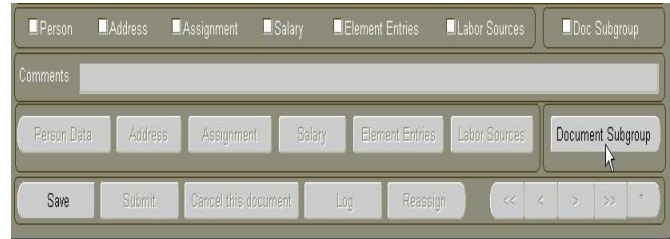
Find OK Cancel

5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date.

Note: *The Document Effective Date for all bi-weekly paid employees receiving a promotion same department must be a Sunday. If the Labor Source(s) are changing, the Document Effective Date must be a future date that is beyond the current pay period for biweekly paid employees. Verify payroll schedules before submitting the document. To view biweekly and monthly payroll schedules go to Financial Affairs webpage. [Click here](#)*

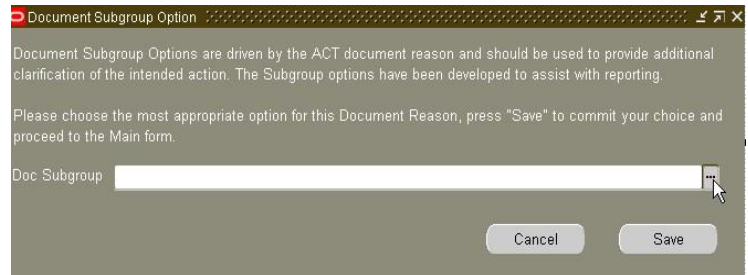
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6. Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.



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. Below the tabs is a Comments field. A row of buttons includes Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The Document Subgroup button is highlighted with a mouse cursor. At the bottom, there are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

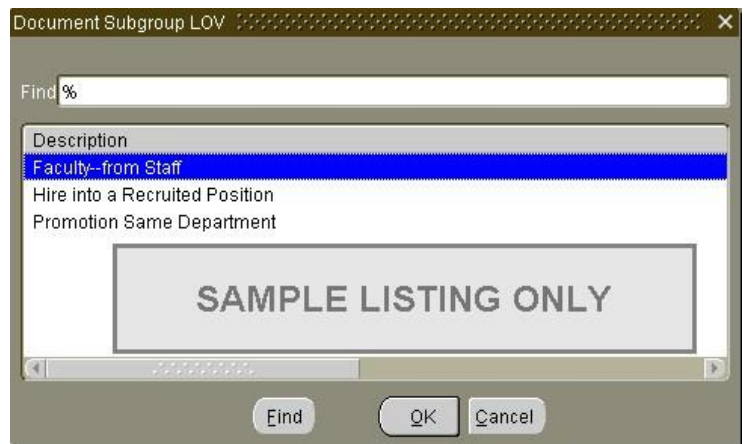
7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc SUBGROUP** field **LOV**.



The screenshot shows the DOCUMENT SUBGROUP OPTION window. It contains text explaining that Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification. It asks the user to choose the most appropriate option for this Document Reason and press "Save" to commit. Below the text is a Doc Subgroup field with a dropdown arrow. At the bottom are Cancel and Save buttons.

8. Select the description that best explains the nature of the transaction.

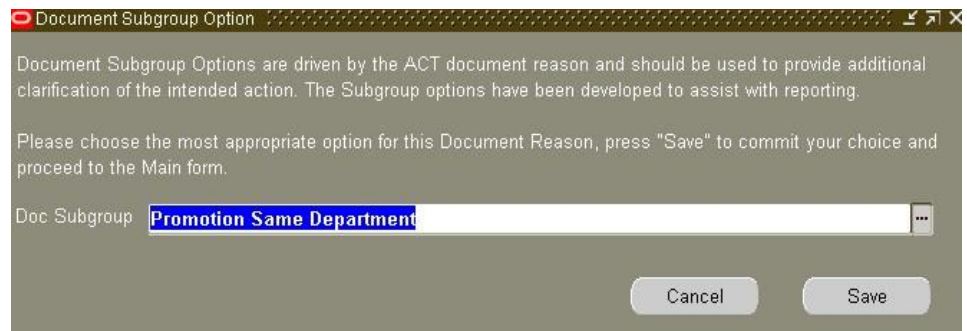
For a complete list of available **DOCUMENT SUBGROUP DESCRIPTIONS** and explanation of when to use, [Click here](#).



The screenshot shows the DOCUMENT SUBGROUP LOV window. It has a Find % field at the top. Below it is a list of descriptions: Faculty--from Staff, Hire into a Recruited Position, and Promotion Same Department. The first item is highlighted. A large box in the center says "SAMPLE LISTING ONLY". At the bottom are Find, OK, and Cancel buttons.

9. Click on **OK** to select.

10. Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.



The screenshot shows the DOCUMENT SUBGROUP OPTION window. The Doc Subgroup field now displays "Promotion Same Department" and is highlighted. The text and instructions are the same as in the previous screenshot. At the bottom are Cancel and Save buttons.

Warning: If you change the **DOC SUBGROUP** field after the initial save in step 10, **you must re-save in order to commit your change.**

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

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12. If the employee's personal information **will not** be changing, [click here](#).

Changing Personal Data

1. If **personal information** pertaining to the employee is changing, click on the **PERSON DATA** button. Most tabs and fields (except for the **PERSONAL** tab) will be available for change or update when using a **current** or **future** document effective date. Limited tabs and fields will be available when using a **retroactive** document effective date.

The screenshot shows the top navigation bar of the ACT system with tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the navigation bar is a 'Comments' field. A row of buttons includes 'Person Data' (circled in red), 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign', along with navigation arrows.

- a. If **VISA** information needs to be changed, click on the **EMPLOYMENT** tab. Select the correct Visa type from the **VISA TYPE LOV**; enter the correct **WORK VISA EXPIRATION DATE**. Click on the **SAVE** button at the bottom of the form.

The screenshot shows the 'Employment' tab selected. The form is divided into 'Current' and 'Proposed' columns. Fields include Ethnic Origin (with 'White' entered in Current), Veteran Status, I-9 Status (with 'Yes' entered in Current), Visa Type, and Work Visa Expiration Date. At the bottom, there are buttons for 'Address', 'Return to Previous Form', and 'Save', and a 'Comments' field.

- b. If **PHONEBOOK** information needs to be added or changed, click on the **PHONEBOOK** tab. Click on the **SAVE** button after entering the information.

The screenshot shows the 'Phonebook' tab selected. The form is titled 'Data used for the UAB Electronic Directory' and is divided into 'Current' and 'Proposed' columns. Fields include Individual Online List (with 'Yes' entered in Current), Online Job Title, Online Display Name, and Faculty and Staff List (with 'Yes' entered in Current). A note on the right says 'Please do not add suffix'. At the bottom, there are buttons for 'Address', 'Return to Previous Form', and 'Save', and a 'Comments' field.

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- c. If **LICENSE** information needs to be added or changed, click on the **LICENSE** tab; choose the appropriate entry from the **TYPE** field LOV. Click on the **SAVE** button after entering the information

The screenshot shows the 'License' tab with the following fields:

	Current	Proposed
Type	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>
Number	<input type="text"/>	<input type="text"/>
Expiration Date	<input type="text"/>	<input type="text"/>

Use down arrow to create multiple records.

- d. If the assignment has a known termination or end date, click on the **TERMINATION** tab; enter the termination or end date in the **PROJECTED LAST DAY OF WORK** field. Click on the **SAVE** button after entering the information.

The screenshot shows the 'Termination' tab with the following fields:

	Current	Proposed
Actual Date	<input type="text"/>	<input type="text"/>
Projected Last Day	<input type="text"/>	<input type="text"/>
Leaving Reason	<input type="text"/>	<input type="text"/>
Retire Recommendation	Yes	<input type="text"/>
Recommendation Reason	<input type="text"/>	<input type="text"/>

2. Click on the **SCHOOLS AND COLLEGES** tab.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	300 Non-Medical Certificate	01-JAN-1994	HD	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

- a. If Schools and Colleges information displays and is **accurate**, click on the **SAVE** button located at the bottom of the form.

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- b. If Schools and Colleges information is ***not accurate***, you may:
 - Overwrite the existing information.
 - Enter additional School or College's, Degree Names, Degree Types by choosing the **Country** and clicking on the next available line.
 - Enter Transcript and Degree Discipline information as required.
3. Click the **SAVE** button and click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.
4. If the employee's ***campus addresses and/or campus phone information*** is changing, click on the **ADDRESS** button. The **ADDRESS** button is located on the **ACT MAIN FORM** and at the bottom of the **PERSON DATA** form.

The screenshot shows a web-based form for managing employee information. It is divided into three main sections: Address, Phones, and International Address/Comments.

Address Section: This section is split into 'Current' and 'Proposed' columns. The 'Current' column contains the following data: Address Type: Campus Primary; Building: HHB; Room: 415; Address Line3: HERITAGE HALL; City: Birmingham; State: AL; Zip Code: 35294 - 1152. The 'Proposed' column is currently empty. Below each column is a note: 'Use the down arrow to view multiple records' for the current data and 'Use the down arrow to create multiple records' for the proposed data.

Phones Section: This section contains a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. The table lists three phone records:

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Home	(205) 934-2339	24-DEC-2007
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Campus Primary	(205) 934-2339	24-DEC-2007
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Work Fax	(205) 975-5712	24-DEC-2007

Below the table is a note: 'Use the down arrow to create multiple records'.

International Address/Comments Section: This section has a checkbox for 'International Address' which is currently unchecked. Below it is a large text area for 'Comments'.

At the bottom of the form are two buttons: 'Return to Previous Form' and 'Save'.

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Changing Assignment Information

1. To change the employee's **assignment information**, click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**.

The screenshot shows a form titled 'General Assignment Information' with two columns: 'Current' and 'Proposed'. The 'Current' column contains the following data:

Assignment Category	04 Irregular
Status	Active Assignment
Expected Return Date	
Organization	114402000 Temporary Services
Location	Bham Main Campus
Position	114402000.50199.130901.
Job	ZT200N1.Temp Specialist Campus
Grade	W.T00
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Supervisor Name	
Supervisor Assignment #	

The 'Proposed' column is currently empty. At the bottom of the form, there is a 'Comments' text area and two buttons: 'Return to Previous Form' and 'Save'.

2. If the employee's **ASSIGNMENT CATEGORY** will be changing, select the appropriate **ASSIGNMENT CATEGORY** from the LOV or type it in the field. This is not a required field when using the **PROMOTION SAME DEPARTMENT** document reason.
3. The **POSITION** and **JOB** fields are required fields when using the **PROMOTION SAME DEPARTMENT** document reason.

4. Click in the **POSITION** field and select the **appropriate position code** from the LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. The selection of position code populates the **ORGANIZATION, LOCATION, JOB** and **GRADE** fields.

The screenshot shows the same form as above, but with the 'Position' field in the 'Proposed' column selected. A dropdown menu is open, showing the following options:

01 Regular FT
090000000 Athletics Department A
Bham Main Campus
090000000.00104.080901
FF201E1.Business Officer I
W.G15

The 'Current' column data remains the same as in the previous screenshot. The 'Proposed' column now shows '01 Regular FT' in the Assignment Category field. The dropdown menu is highlighted in yellow.

5. The **PAYROLL GROUP** and all three **TIMEKEEPING** fields are available for change or update if necessary.
6. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.

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General Assignment Information		Current	Proposed
Assignment Category	<input type="text"/>		04 Irregular
Status	<input type="text"/>		Active Assignment
Expected Return Date	<input type="text"/>		
Organization	<input type="text"/>		340000000 School of Nursing Dear
Location	<input type="text"/>		Bham Main Campus
Position	<input type="text"/>		340000000.00206.110615
Job	<input type="text"/>		FF217E3.Financial Officer III
Grade	<input type="text"/>		W.G18
Payroll Group	<input type="text"/>		Staff 12
Timecard Dist Number	<input type="text"/>		
Timekeeping Method	<input type="text"/>		
Timekeeping Organization	<input type="text"/>		
Supervisor Name	<input type="text"/>		
Supervisor Assignment #	<input type="text"/>		
Comments	<input style="width: 100%;" type="text"/>		

7. Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number.
Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.

Supervisor Info X

Full_Name	Assignment_Number	Job_Name	Org_Name
Employee, Employee	1555555	HR812M0.MGR-PHYSICAL THERAPY	708400000 Rehabilitation Services
Employee, Testing 1	1555551	HR206E1.PHYSICAL THERAPIST	708400000 Rehabilitation Services
Employee, Relations	1555552	AA305N0.MEDICAL & DENTAL STAF...	708100000 Quality Resources
Employee, Sample 1	1555553	AC100N1.Admin Assoc	311401000 Med - Cardiovascular D

8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
9. Click on the **SAVE** button.
10. Click on the **RETURN TO PREVIOUS FORM** button.

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Changing Salary Information

1. To change the Salary information, click on the **SALARY** button, located on the **ACT MAIN FORM**.
2. Click in the **PROPOSED SALARY BASIS** field if required.

Premium Plan	NA		
Salary Basis	Salary		...
Payroll	Monthly		

3. Use the LOV to enter the correct **SALARY BASIS** information or type it in. This field will vary based on other field information such as **Organization** and **Position**.
4. Click **OK**. The **PROPOSED SALARY BASIS** and **PAYROLL** fields will populate.

Salary Basis	Hourly	Salary	...
Payroll	Biweekly	MONTHLY	

5. Click in the **REASONS** field located at the top of the form, select **PROMOTION** from the LOV.

The screenshot shows the 'Component Reasons' section of the ACT system. A dropdown menu is open, showing a list of reasons: 'Award of Tenure', 'Merit Increase', and 'Promotion'. 'Promotion' is selected and highlighted. The background form has fields for 'Reason', 'Change Value', and 'Change %'. A tooltip is visible, stating 'Change value = Difference in rate of pay.' The form also includes a 'Proposed' section with several empty rows and a '(Annual)' label. At the bottom, there are buttons for 'Return to Previous Form' and 'Save'.

6. Enter the amount of increase or decrease in the **hourly rate** (for a bi-weekly paid employee) or the amount of increase or decrease in the **monthly rate** (for a salaried employee) in the **CHANGE VALUE** field. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.

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Component Reasons	Reason	Change Value	Change %	
	Promotion	250.00	4.07	Change value = Difference in rate of pay.
Use the down arrow to create multiple records.				

7. If the **FTE** is changing, enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.
8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
9. Click on the **RETURN TO PREVIOUS FORM** button.

Changing Labor Source Information (General Ledger)

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

Costing										
Assignment		Element								
Current	Effective Date									
LD	Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAR-2006		2101046.000.123400000.349100000						100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006		3100127.000.213100127.311250000						100.00
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
										Total LD % 100.00
Comments:										

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

2. If the employee has a GL funding source, click in the GL Code field.
 - a. Click on the **GL CODE LOV**. This opens the **UAB_AKF FIND** window.
 - b. Enter the **ten-digit GL Account number** in the **ALIAS** field; click **OK**. This opens the window below. All but the **OBJECT** field has been auto populated.
 - c. Click in the **OBJECT** field and enter **Zero (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.
 - d. Type in the **percent of the employee's funding** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

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Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

- e. Repeat the above steps to enter all **GL account** funding sources. The **TOTAL LD %** field has to total **100%** before you can save the document.
3. If the employee is funded from a **grant** and this information is changing, click once in the **PROJECT** field of the next available row.
 - a. Type the **project number** in the **PROJECT** field or choose the **Project number** from the LOV. Press the **TAB** key or click in the next **TASK** field.
 - b. Type the **task number** in the **TASK** field or choose the **Task number** from the LOV. **TAB** to the **AWARD** field or click in the **AWARD** field.
 - c. Type the **award number** in the **AWARD** field or choose the **Award number** from the LOV. **TAB** to or click in the next field. Type in the **organization number** or choose the **Expenditure Organization number** from the LOV.

Note: For the hospital, this will be 70. For the university, this will be 10.

4. Type in the **percent of the employee's effort** to be charged to the project number in the **%** field. Total percent must equal 100%.
5. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.
6. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

Submitting the Document

1. Click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. [Click here](#) for a listing of attachments required by Records Administration.



The screenshot shows a window titled "ACT Main Form" with the following fields and values:

Document Reason	PROMOTION SAME DEPAR	Document Number	536162
Effective Date	03-APR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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



4. Click **YES** or **No**, depending on whether **ATTACHMENTS** are required.
5. 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).*

6. Once the 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](#)