

Appoint, Change and Terminate (ACT) Documentation

Salary Schedule Adjustment

The **SALARY SCHEDULE ADJUSTMENT** document reason is used only when a fluctuation (either up or down) in salary occurs for an employee, trainee or student.

If changing assignment related data, use PROMOTION SAME DEPARTMENT, TRANSFER LATERAL/SAME DEPARTMENT or TRANSFER WITH PROMOTION document reason.

When using the **SALARY SCHEDULE ADJUSTMENT** document reason, the **SALARY**, and **LABOR SOURCE** forms are available for update. **PERSON DATA**, **ADDRESS**, and **ASSIGNMENT** fields are available for **viewing only**.

UAB HR Officer → HR Transactions → ACT → Find Window

The use of the **SALARY SCHEDULE ADJUSTMENT** document reason is limited to the situations listed below:

Faculty:

- Used when a faculty member has a fluctuation either up or down in salary or there is a change in payroll group. Presently used for the following:
- Adding/deleting an officially approved and appointed administrative assignment for a faculty member that requires an increase/decrease in salary and/or change in payroll.
- Change in payroll from 9/9 to 9/12 or vice versa. All changes from or to 9/9 and 9/12 must be effective at the beginning of the contract year on August 15. Any other effective date requires prior approval by the Provost's office.
- Shifts between UAB and HSF/VA or any other external salary source and UAB.
- Change in FTE with associated change in salary.
- Decrement in salary or removal of an administrative appointment that does not affect the assignment.

Staff:

- To adjust an employee's salary to the minimum amount of his/her pay grade range.
- To give a Hospital pool differential increase to a Hospital employee
- To increase or decrease an FTE for a monthly paid employee
- To make salary changes for a student assistant, graduate assistant, or post-doc.

Note: An ***increase*** in salary due to merit, equity, retention, additional duties/responsibilities, job rate plan increases other than Oct 1 or step increases other than Oct 1 ***cannot*** to be processed using the **SALARY SCHEDULE ADJUSTMENT** document reason. If a salary increase situation does not seem to fit into any of the available document reasons (Merit, Equity or Probationary Increase) contact Compensation.

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1. Use the **FIND WINDOW** to locate the employee. Click on the **CREATE NEW DOCUMENT** button.

Find

Document Number

Requestor

Full Name

Identification Number **1034266**

SSN (xxxxxxxx)

Employee Blazer Id

Assignment Number

Effective Date

Clear Data Inquiry Retrieve a Document **Create New Document**

Note: After you click on the **Create New Document** button you might see another window pop up. The employee may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.

2. When the new document opens, click once in the **DOCUMENT REASON** field; use the **DOCUMENT REASON LOV** to choose **SALARY SCHEDULE ADJUSTMENT** or type the words **Salary Schedule Adjustment** in the **DOCUMENT REASON** field.

Document Reason

Effective Date

Requestor Name **HALEY**

Attachments Received

Document Number

Document Status

Workflow Type

Submit Date

Person Data

Name

Identification Number

SSN

Latest Hire Date

Date of Birth

Assignment Data

Assignment Number

Assignment Category

Job

FTE

Assignment Salary

Person A

Comments

Person Data Sources

Document Reason

Find %

Doc_Reason	Doc_Type
PROMOTION SAME DEPARTMENT	CHANGE
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES
SABBATICAL FULL PAY	LEAVES
SABBATICAL HALF PAY	LEAVES
SALARY SCHEDULE ADJUSTMENT	CHANGE
TERMINATE EMPLOYEE	TERMINATION
TRANSFER LATERAL/DIFFERENT DEPT	CHANGE
TRANSFER LATERAL/SAME DEPT	CHANGE
TRANSFER WITH PROMOTION	CHANGE

Find OK Cancel

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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-MM-YYYY** date format.

Note: *The Document Effective Date for all bi-weekly paid employees receiving a Salary Schedule Adjustment 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.*

The screenshot shows the 'ACT Main Form' with the following details:

- Document Reason:** SALARY SCHEDULE ADJUS
- Effective Date:** 01-OCT-2009
- Requestor Name:** HALEY
- Document Number:** (empty)
- Document Status:** (empty)
- Workflow Type:** (empty)
- Submit Date:** (empty)
- Person Data:** Name, Gender, Identification Number, Ethnic Origin, SSN, Total Active Assignments, Service Date, Total Projected Annual Salary, Date of Birth, Prior UAB Service (checkbox).
- Assignment Data:** Assignment Number, Assignment Status, Assignment Category, Organization, Job, Position, FTE, Primary, Projected Assignment Salary, Payroll.
- Checkboxes:** Person, Address, Assignment, Salary, Element Entries, Labor Sources, Doc Subgroup.
- Buttons:** Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Document Subgroup, Save, Submit, Cancel this document, Log, Reassign, navigation arrows.

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

- The **DOCUMENT SUBGROUP OPTION** window will open; click on **DOC SUBGROUP** field LOV.

The screenshot shows the 'Document Subgroup Option' window with a list of descriptions:

- Change in Award
- Change in FTE
- Faculty-Award of Tenure
- Faculty-Begin Administrative Supplement
- Faculty-Changing 9+12 or 12+9
- Faculty-End Administrative Supplement
- Hospital-Change in Premium Plan
- Increase Salary within Authorized Plan
- Increase to Federal Minimum Wage
- Increase to Minimum
- Prevailing Wage Adjustment
- Salary Change from Affiliated Source(s)
- Salary Schedule Adjustment
- UAB Temporary Svcs--Change in Temporary Assignment

Buttons: End, OK, Cancel

- 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](#).

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7. Click on **OK** to select.

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

Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup **Change in Award**

Cancel Save

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

ACT Main Form

Document Reason: **SALARY SCHEDULE ADJUS** Document Number: _____
Effective Date: **01 OCT 2005** Document Status: _____
Requestor Name: **HALEY** Workflow Type: _____
Submit Date: _____
 Attachments Received

Person Data

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

Assignment Data

Assignment Number: _____ Assignment Status: _____
Assignment Category: _____ Organization: _____
Job: _____ Position: _____
FTE: _____ Primary: _____
Projected Assignment Salary: _____ Payroll: _____

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

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ACT Main Form

Document Reason: **SALARY SCHEDULE ADJUS** Document Number: **422910**
 Effective Date: **01-OCT-2009** Document Status: **OPEN**
 Requestor Name: **HALEY** Workflow Type: **CHANGE**
 Attachments Received Submit Date: _____

Person Data

Name: **Example, Five** Gender: **Female**
 Identification Number: **1234567** Ethnic Origin: **White**
 SSN: **252-35-7146** Total Active Assignments: **1**
 Service Date: **01-JUL-2007** Total Projected Annual Salary: **xx,xxx.xx**
 Date of Birth: **16-JAN-1978** Prior UAB Service

Assignment Data

Assignment Number: **1234567** Assignment Status: **Active Assignment**
 Assignment Category: **20 Post Doc Trainee** Organization: **392500000 Physiology & Bic**
 Job: **ZZZ9.Postdoctoral Trainee** Position: **392500000.00002.031001**
 FTE: _____ Primary: **Y**
 Projected Assignment Salary: **xx,xxx.xx** Payroll: **Trainee**

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 << < > >> *

10. Click on the **SALARY** button located at the bottom of the **ACT MAIN FORM**.

Component Reasons

Reason	Change Value	Change %

Change value = Difference in rate of award.
 Use the down arrow to create multiple records.

	Current	Proposed
Projected Assignment Salary	xx,xxx.xx	
Actual Assignment Rate of Pay	x,xxx.xx	
FTE		
Hosp Calc Code		
Premium Plan	NA	
Salary Basis	Trainee	
Payroll	Trainee	
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments		

Return to Previous Form Save

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11. Click in the **REASON** field located at the top of the form; select component reason from the LOV. Click **OK**.

The screenshot shows the 'Component Reasons' section of the ACT form. A dialog box titled 'Component Reason' is open, displaying a list of reasons: 'Award of Tenure' and 'Salary Schedule Adjustment'. The 'Salary Schedule Adjustment' option is highlighted. In the background, the 'REASON' field in the 'Component Reasons' table is selected, and an arrow points to it from the instruction text above.

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

The screenshot shows the 'Component Reasons' section of the ACT form. The 'CHANGE VALUE' field is highlighted, and the value '-2,999.88' is entered. An arrow points from the note below to this field.

Note: If the Salary Schedule Adjustment is a reduction in the employee's hourly rate or monthly rate, indicate the amount to be reduced by entering the negative (-) symbol before the dollar amount to be reduced. If the Salary Schedule Adjustment is an increase in the employee's hourly rate or monthly rate, enter the dollar amount of the increase only.

The screenshot shows the 'Component Reasons' section of the ACT form. The 'CHANGE VALUE' field is highlighted, and the value '150.00' is entered.

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Salary Schedule Adjustment

Component Reasons	Reason	Change Value	Change %	
	Salary Schedule Adjustment	-2,999.98	-80.00	Change value = Difference in rate of pay.
Use the down arrow to create multiple records.				

13. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered.

Component Reasons	Reason	Change Value	Change %	
	Salary Schedule Adjustment	-2,999.98	-80.00	Change value = Difference in rate of pay.
Use the down arrow to create multiple records.				

	Current	Proposed	
Assignment Salary	44,999.76	8,999.95	
Assignment Rate Pay	3,749.98	750.00	
FTE	0.75		
Hosp Calc Code			
Premium Plan	NA		
Salary Basis	Salary		
Payroll	Monthly		
Outside Income Source			
Outside Income			(Annual)
CFB Code	GROUP E		

14. 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.

	Current	Proposed
Assignment Salary	44,999.76	8,999.95
Assignment Rate Pay	3,749.98	750.00
FTE	0.75	0.15

15. If the employee is receiving funds from either the VA or Eye Foundation, enter the information in the **OUTSIDE INCOME SOURCE** field, if applicable. This should be an annual amount.

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16. Enter **comments** as needed in the **COMMENTS** field at the bottom of the **SALARY** form. Comments entered here will appear on the **ACT MAIN FORM**.

Component Reasons	Reason	Change Value	Change %	
	Salary Schedule Adjustment	-2,999.98	-80.00	Change value = Difference in rate of pay.
Use the down arrow to create multiple records.				

	Current	Proposed	
Assignment Salary	44,999.76	8,999.95	
Assignment Rate Pay	3,749.98	750.00	
FTE	0.75	0.15	
Hosp Calc Code			
Premium Plan	NA		
Salary Basis	Salary		
Payroll	Monthly		
Outside Income Source			
Outside Income			(Annual)
CFB Code	GROUP E		
Comments	Change of FTE to .15 -- rate of salary same (roughly \$28.85/hr)		

Note: Use the **COMMENTS** field to explain the purpose of the Salary Schedule Adjustment. Comments assist both Organizational Approvers and Central Administration in approving the document.

17. Click on the **SAVE** button.

18. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

19. If the individuals **LABOR SOURCE** information is **not changing**, and **you are not submitting Element Entries** with this document, [click here](#).

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 **ASSIGNMENT FORM** or from the **ACT MAIN FORM**.

Comments

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Costing

Assignment		Element								
Current	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%	
LD		From Date	To Date							
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	25-DEC-2005	29-SEP-2006		228195	28.01	1528195	10	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

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.**

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.
 - f. 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.
 - g. 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.

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- d. 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.

- e. Type in the **percent of the employee's effort** to be charged to the project number in the % field.

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

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

ACT Main Form

Document Reason	SALARY SCHEDULE ADJUS	Document Number	422910
Effective Date	01-OCT-2009	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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.

Decision

Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.

No Yes

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).

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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](#)