

Appoint, Change and Terminate (ACT) Documentation Transfer with Promotion

The **TRANSFER WITH PROMOTION** document reason is used when an employee is transferring to another organization to a job classification that is a **higher pay grade** than their current job classification.

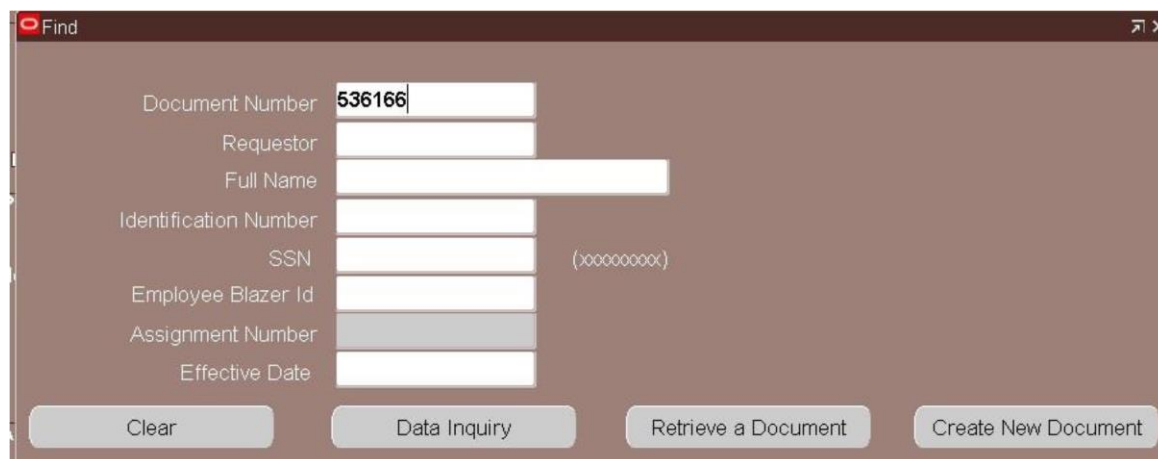
Note: The current organization creates the document and **reassigns** the document to the new organizations Requestor. The new Requestor should be able to locate the document by reviewing the list of documents for their requestor name, by the document number or the employee's name, identification number, or Social Security Number. For instructions on how to **reassign** ACT documents, [click here](#).

Also used when a faculty member transfers to another organization with an associated higher faculty rank. May or may not involve a change in salary.

The new organization requestor should complete or update the following forms/tabs: **ADDRESS/PHONE** (campus information only), **SCHOOLS AND COLLEGES**, **ASSIGNMENT**, **SALARY**, and **LABOR SOURCE**.

UAB HR Officer → HR Transactions → ACT → Find Window

1. Use the **FIND WINDOW** to locate the reassigned document.



2. Click on the **RETRIEVE A DOCUMENT** button.

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3. The **ACT MAIN FORM** opens.

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (TRANSFER WITH PROMOTI), Effective Date (03-APR-2011), Requestor Name (HALEY), Document Number (536168), Document Status (OPEN), Workflow Type (CHANGE), and Submit Date.
- Person Data:** Name (Test, Case E), Gender (Female), Identification Number (1013225), Ethnic Origin (White), SSN, Service Date (27-NOV-2000), Total Active Assignments (1), Date of Birth (01-JUL-1978), Total Projected Annual Salary (34,840.00), and a checkbox for Prior UAB Service.
- Assignment Data:** Assignment Number (1013225), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (464000000 Government), Job (AC100N1.Admin Assoc), Position (464000000.01001.031001), FTE (1), Primary (Y), Projected Assignment Salary (34,840.00), and Payroll (Biweekly).
- Navigation and Actions:** A row of checkboxes (Person, Address, Assignment, Salary, Element Entries, Labor Sources, Doc Subgroup) and a 'Comments' field. Below these are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom are 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

Changing Personal Data

4. 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.

This close-up screenshot focuses on the bottom portion of the form, showing the navigation controls:

- A row of checkboxes: Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup (checked).
- A 'Comments' text area.
- A row of buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup.
- A bottom row of buttons: Save, Submit, Cancel this document, Log, Reassign, and 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.

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Personal | Employment | **Phonebook** | License | Termination | Schools and Colleges

	Current	Proposed
Ethnic Origin	White	
Veteran Status		
I-9 Status	Yes	
Visa Type		
Work Visa Expiration Date		

Comments:

Address Return to Previous Form Save

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

Personal | Employment | Phonebook | **License** | Termination | Schools and Colleges

Data used for the UAB Electronic Directory

	Current	Proposed
Individual Online List	Yes	
Online Job Title		
Online Display Name		
Faculty and Staff List	Yes	

Assignment Job Title (Last Name, First Name) *** Please do not add suffix

Comments:

Address Return to Previous Form Save

- 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

Personal | Employment | Phonebook | License | **Termination** | Schools and Colleges

License/Certificate/Membership Information

	Current	Proposed
Type		
Title		
Number		
Expiration Date		

Use down arrow to create multiple records.

Comments:

Address Return to Previous Form Save

- 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.

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5. 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		

6. If Schools and Colleges information displays and is **accurate**, click on the **SAVE** button located at the bottom of the form.
7. 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 a Country and clicking on the next available line.
 - Enter Transcript and Degree Discipline information as required.
8. Click the **SAVE** button and click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

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- 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.

Address		Current	End Date Current	Proposed
Address Type	Campus Primary			Campus Primary
Building	HHB			
Room	416			
Address Line3	HERITAGE HALL			
City	Birmingham			
State	AL			
Zip Code	35294	1152		

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

International Address: ☐

Comments:

Return to Previous Form Save

Changing Assignment Information

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

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 << < > >> *

- 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 **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.
- 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.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		
Expected Return Date			
Organization	464000000 Government		
Location	Bham Main Campus		
Position	464000000.01001.031001		
Job	AC100N1.Admin Assoc		
Grade	W.G13		
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method	TEL		
Timekeeping Organization			

Comments:

Return to Previous Form Save

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4. The selection of position code populates the **ORGANIZATION**, **LOCATION**, **JOB** and **GRADE** fields.

General Assignment Information	
	Current
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	112402000 Project Management S
Location	Bham Main Campus
Position	112402000.21501.110925
Job	CG204N1.Office Assoc I
Grade	W.G09
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Supervisor Name	
Supervisor Assignment #	
Comments	

	Proposed
Assignment Category	01 Regular FT
Status	
Expected Return Date	
Organization	090000000 Athletics Department A
Location	Bham Main Campus
Position	090000000.00104.080901
Job	FF201E1.Business Officer I
Grade	W.G15
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Supervisor Name	
Supervisor Assignment #	

Return to Previous Form Save

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.

General Assignment Information	
	Current
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	112402000 Project Management S
Location	Bham Main Campus
Position	112402000.21501.110925
Job	CG204N1.Office Assoc I
Grade	W.G09
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Supervisor Name	
Supervisor Assignment #	
Comments	

	Proposed
Assignment Category	01 Regular FT
Status	
Expected Return Date	
Organization	090000000 Athletics Department A
Location	Bham Main Campus
Position	090000000.00104.080901
Job	FF201E1.Business Officer I
Grade	W.G15
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Supervisor Name	
Supervisor Assignment #	

Return to Previous Form Save

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.

Find %

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

Find OK Cancel

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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.

Changing Salary Information

1. To change the Salary information, click on the **SALARY** button, located on either the **ACT MAIN FORM** or on the **ASSIGNMENT** form.

The screenshot shows the top navigation bar of the ACT form. It includes tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below these tabs is a row of buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The 'Salary' button is circled in red. At the bottom of the bar are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

2. Click in the **SALARY BASIS** field if required.

The screenshot shows the 'Salary Information' form with two columns: 'Current' and 'Proposed'. A warning message box is displayed over the form, stating: 'SALARY BASIS must be Salary or Hourly , If the assignment is STAFF 12'. The 'Current' column contains the following values: Projected Assignment Salary (34,840.00), Actual Assignment Rate of Pay (16.75), FTE (1.00), Hosp Calc Code (), Premium Plan (NA), Salary Basis (Hourly), Payroll (Biweekly), Outside Income Source (), Outside Income (0.00), and CFB Code (). The 'Proposed' column has empty fields for all corresponding values. At the bottom of the form are buttons for 'Return to Previous Form' and 'Save'.

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- 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**. Click **OK**.

Select Salary Basis

Find %

Salary Basis

- 12 in 12
- 9 in 12
- 9 in 9
- Hourly
- Salary**
- Trainee

End OK Cancel

- Click in the **REASONS** field located at the top of the form, select **TRANSFER ADJUSTMENT** from the LOV.

Component Reasons

Reason Change Value Change %

Transfer Adjustment 3,000.00

Change value = Full monthly rate of pay.

Use the down arrow to create

Current

Projected Assignment Salary 34,840.00

Actual Assignment Rate of Pay 16.75

FTE 1.00

Hosp Calc Code

Premium Plan NA

Salary Basis Hourly

Payroll Biweekly

Outside Income Source

Outside Income 0.00

CFB Code

Comments

Proposed

Projected Assignment Salary 36,000.00

Actual Assignment Rate of Pay 3,000.00

FTE

Hosp Calc Code

Premium Plan NA

Salary Basis

Payroll MONTHLY

Outside Income Source

Outside Income (Annual)

CFB Code

Comments

Return to Previous Form Save

- 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 if necessary. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.

Component Reasons

Reason Change Value Change %

Transfer Adjustment 3,000.00

Change value = Full monthly rate of pay.

Use the down arrow to create multiple records.

Current

Projected Assignment Salary 34,840.00

Actual Assignment Rate of Pay 16.75

FTE 1.00

Hosp Calc Code

Premium Plan NA

Salary Basis Hourly

Payroll Biweekly

Outside Income Source

Outside Income 0.00

CFB Code

Comments

Proposed

Projected Assignment Salary 36,000.00

Actual Assignment Rate of Pay 3,000.00

FTE

Hosp Calc Code

Premium Plan NA

Salary Basis

Payroll MONTHLY

Outside Income Source

Outside Income (Annual)

CFB Code

Comments

Return to Previous Form Save

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6. 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.
7. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
8. 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**.

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

The screenshot shows the Costing window. At the top, it displays Assignment Salary as 31,848.00 and an Element Name dropdown. Below is a table with columns: LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The table contains three rows of data. A red arrow points to the STOP checkbox in the first row. At the bottom right, it shows Total LD % as 100.00.

LD	Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAY-2006	28-FEB-2010		301095	10.02	2001865	10	50.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAY-2006	30-MAR-2010		301354	50.02	2001976	10	50.00
<input type="checkbox"/>	<input type="checkbox"/>	04-OCT-2009	31-JAN-2011		300934	10.02	2001900	10	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.

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- 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.
 - 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

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