Appoint, Change and Terminate (ACT) Documentation
Additional Assignment

The **ADDITIONAL ASSIGNMENT** ACT document is used when an existing UAB employee or trainee is given an assignment in addition to their regular primary assignment duties.

Primary Organization -- Every UAB employee is affiliated with a **primary organization** which is the organization responsible for the employee's primary assignment. If an additional assignment is approved for an employee, the secondary organization must contact the primary organization and request an **ADDITIONAL ASSIGNMENT** document be created for the employee. The primary organization's HR Officer must be given the name of the person to whom the document is to be reassigned to, and the effective date of the document.

Secondary Organization -- The **secondary organization** is the organization that will be responsible for the secondary assignment and for payment of the secondary assignment. Once the **ADDITIONAL ASSIGNMENT** ACT document is created by the primary organization and reassigned, the secondary organization must complete the document and submit for approval.

Approval notifications will be delivered to all level one approvers on the secondary organization workflow approval path. A 24-hour hold notification will be delivered to the ***notify person*** for the primary organization.

Instructions for completing each form on the **ADDITIONAL ASSIGNMENT** ACT document can be accessed by clicking on each section heading below, or by scrolling to the referenced page number.

Creating an Additional Assignment (Primary Organization)

UAB HR Officer → HR Transactions → ACT → Find Window

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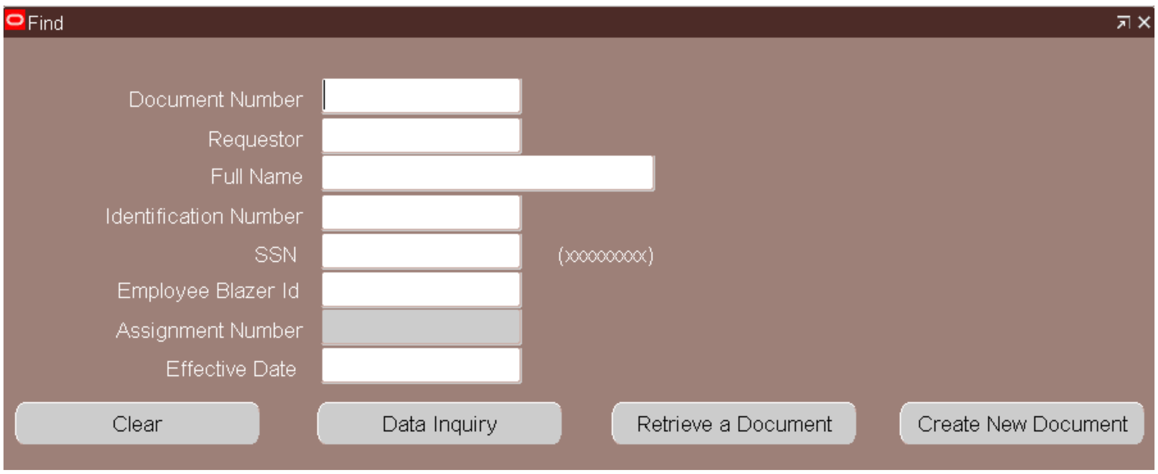
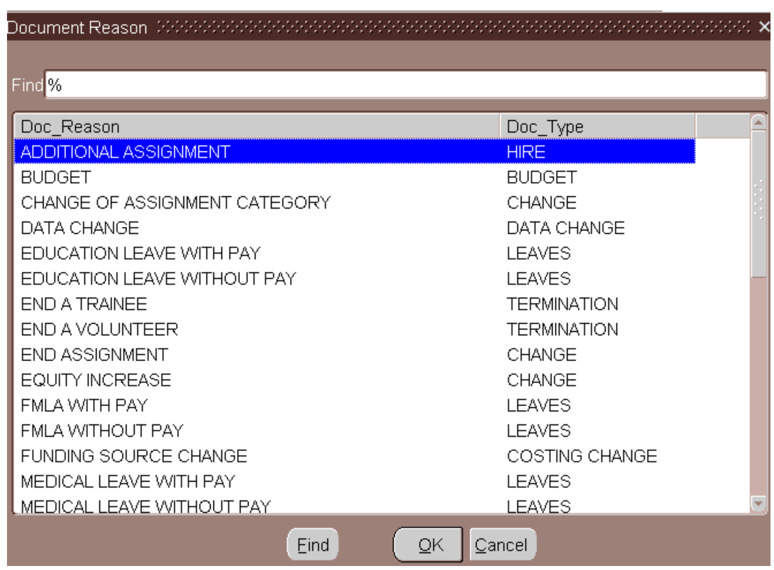
1. Selecting **ACT** opens the **ACT FIND** window.



2. Use the **FIND** window to locate the employee in which you are creating and **ADDITIONAL ASSIGNMENT** document. A blank **ACT MAIN FORM** will display.

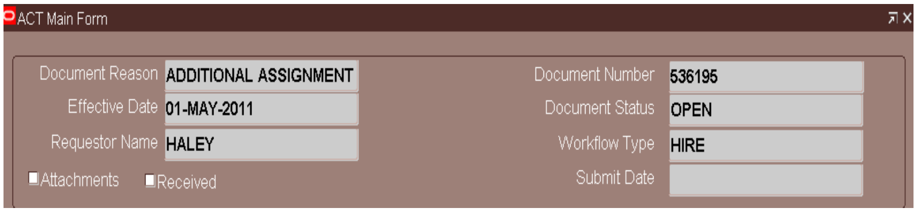
3. Click on the **DOCUMENT REASON** field LOV. Select **ADDITIONAL ASSIGNMENT**, click **OK**.



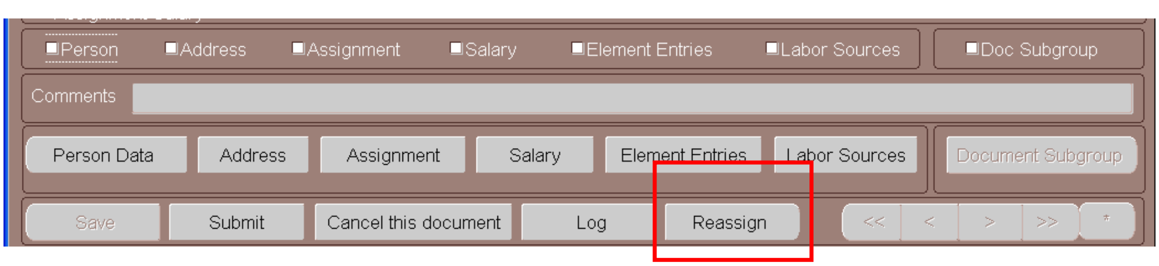
4. Enter the ***effective date of the document*** in the **EFFECTIVE DATE** field. Use the Calendar LOV or ***type in the desired date***. Remember to use the **DD-MMM-YYYY** format.

Note: The ***Document Effective Date*** for all bi-weekly paid employees receiving an Additional Assignment 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.

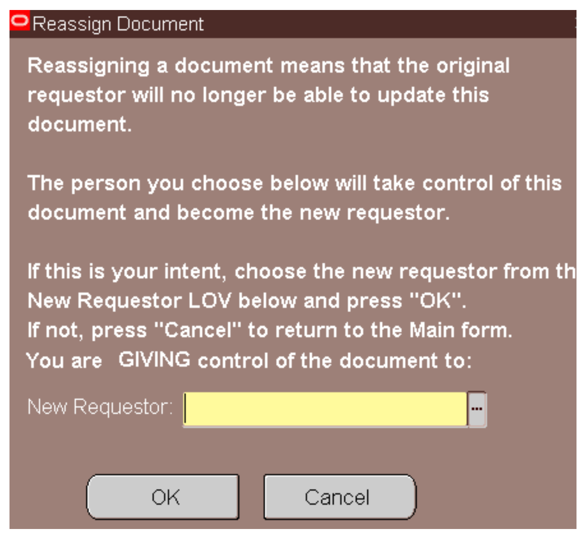
5. Click on the **SAVE** button located at the bottom of the **ACT MAIN FORM**.



6. Click on the **REASSIGN** button at the bottom of the **ACT MAIN FORM**.



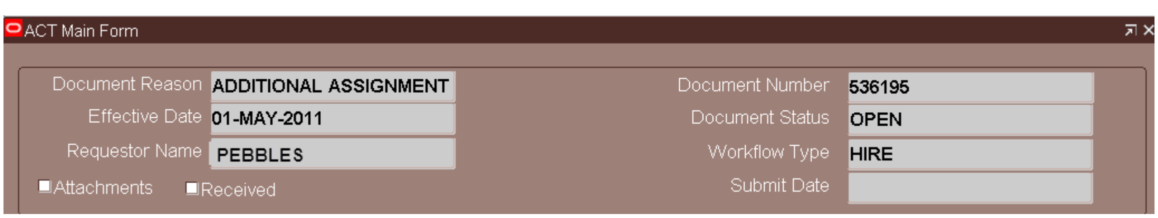
7. A message box like the one shown should appear.



8. Click inside the **NEW REQUESTOR** field and enter ***the Requestor's last name, first name as it is listed***. Or use the LOV to locate the Requestor who will be receiving the reassigned document.

9. After locating the Requestor, click **OK**.

10. From the **ACT MAIN FORM**, view the **REQUESTOR NAME** field information located at the top of the form. The field should display the new Requestor name.



Notify the new Requestor that you have reassigned the document and give them the document number so that the document can be quickly found.

The **Primary Organization's** portion of the **ADDITIONAL ASSIGNMENT** document is **COMPLETE**.

Note: ***The original requestor will not have access to the document once it has been reassigned to the new requestor.***

Creating an Additional Assignment (Secondary Organization)

UAB HR Officer → HR Transactions → ACT → Find Window

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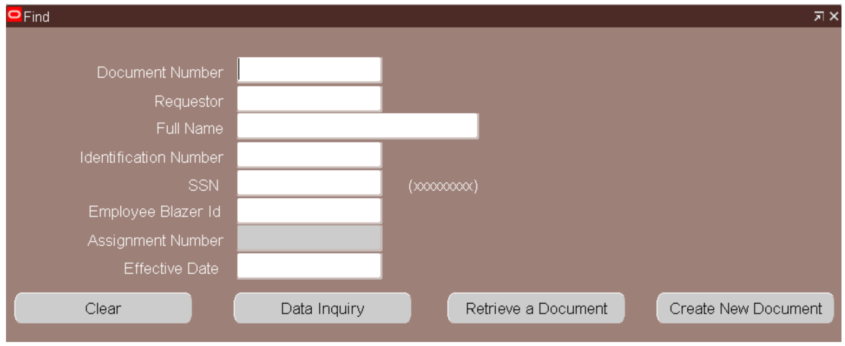
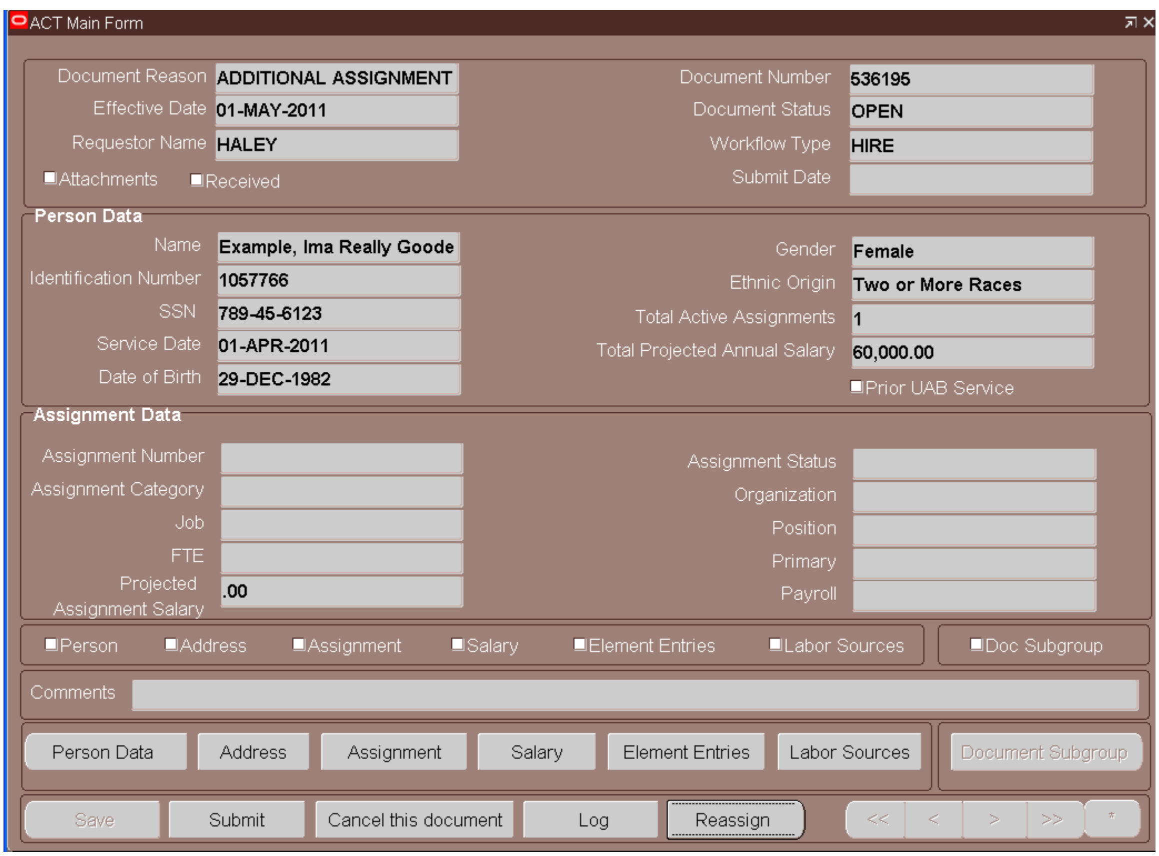
1. Enter ***the document number of the Additional Assignment document*** reassigned to you by the Primary Organization in the **DOCUMENT NUMBER** field.



2. Click on the **RETRIEVE A DOCUMENT** button. The **ACT MAIN FORM** with the employee's information will display.



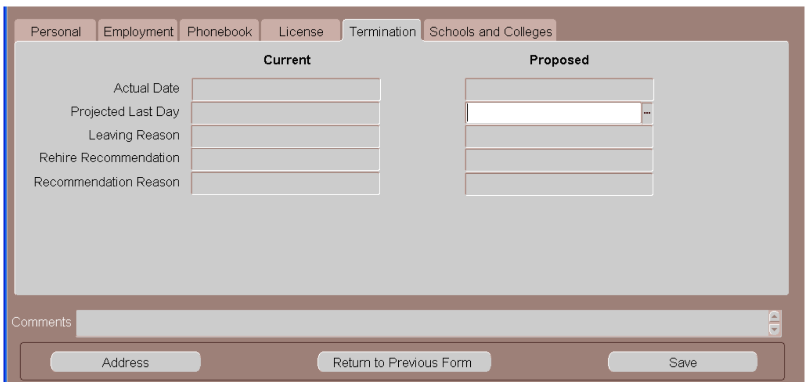
3. If the **ADDITIONAL ASSIGNMENT** being set up has a predetermined end date, click on the **PERSON DATA** button at the bottom of the **ACT MAIN FORM**.

Entering Person Data Information

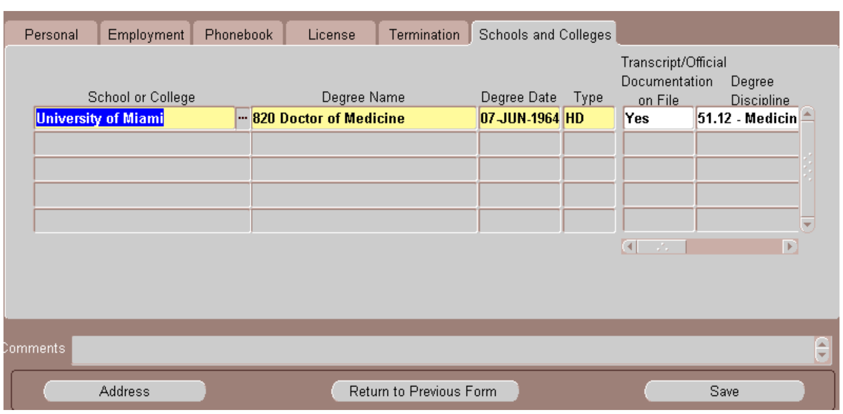
The only tabs on the **PERSON DATA** form available for entry are the **TERMINATION** tab and the **SCHOOLS AND COLLEGES** tab. The **ADDRESS** button on the **PERSON DATA** form will available if adding a Campus Secondary or Tertiary address or additional phone information.

The **PERSON DATA** form opens displaying the **TERMINATION** tab.

1. Click in the **PROPOSED PROJECTED LAST DAY** field to enter a predetermined end date for the assignment. Enter ***the projected last day of work*** using the ***dd-mmm-yyyy*** format in the **PROJECTED LAST DAY OF WORK** field.



2. Click on the **SAVE** button, the **SCHOOLS AND COLLEGES** tab will display.

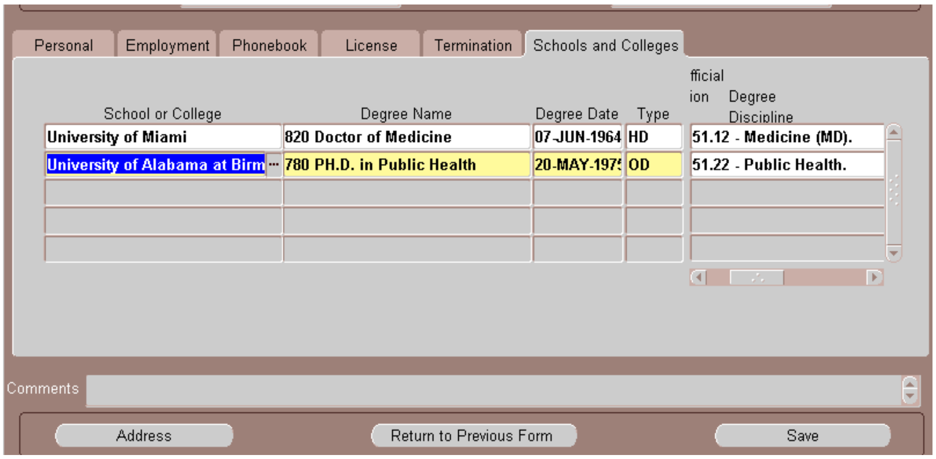


3. If previous **SCHOOLS AND COLLEGES** information displays and is ***accurate***, click on the **SAVE** button located at the bottom of the form.

4. If previous Schools and Colleges information is ***not accurate***, you may:
    a. Overwrite the existing information.
    b. Enter additional School or College's, Degree Names, Degree Types by clicking on the next available line.
    c. Enter Transcript and Degree Discipline information as required.

5. If Schools and Colleges information does not display, proceed to enter applicable information. For instructions on entering Schools and Colleges information, ***click here***.

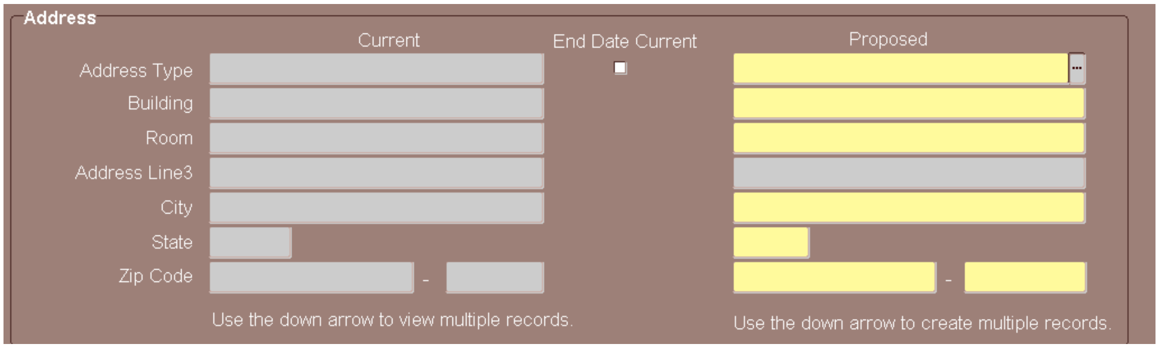
6. Click the **SAVE** button located at the bottom of the form; click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.



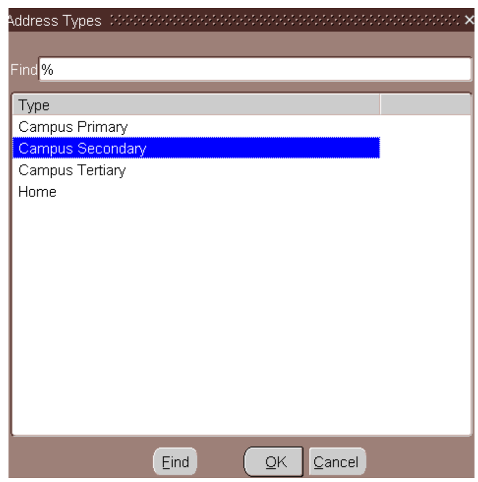
Entering Address and Phone Information

1. When adding a ***Campus Secondary*** or ***Tertiary*** address or additional phone information, click on the **ADDRESS** button at the bottom of the **PERSON DATA** form.

2. To add a **CAMPUS SECONDARY** and/or **TERTIARY** address, press the down arrow on your keyboard. This will scroll to blank address fields.



3. Click on the **ADDRESS TYPE** LOV and select **CAMPUS SECONDARY** and/or **TERTIARY** address. Click **OK**.



4. Click in the **BUILDING** field. Enter ***the building code***, if known. You may choose the building information from the LOV using the percent sign (%) and a partial name to limit the list. The full name of the campus building will populate the field titled **ADDRESS LINE3**.

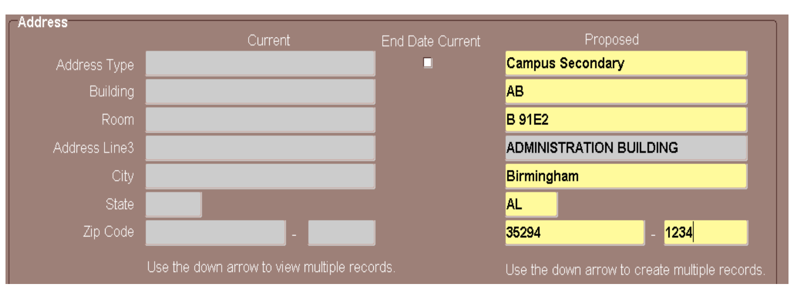
5. Enter ***the room number*** in the **ROOM** field.

6. Enter the city name in the **CITY** field. The LOV listing will display and you can choose the correct city from the listing. The **STATE** field should be populated automatically after choosing the city from the LOV.

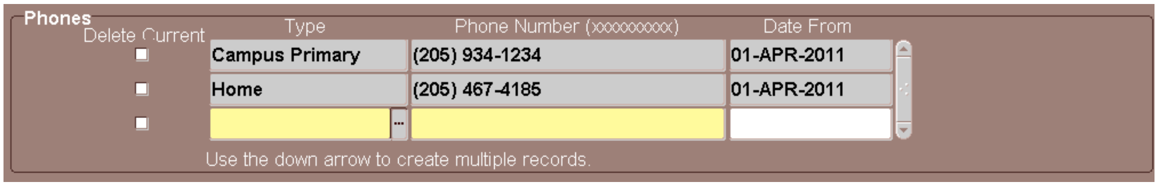
7. Type in ***the appropriate zip code*** in the **ZIP CODE** field if one was not automatically entered.

8. Enter ***the four-digit extension*** to ensure that the employee receives campus mail.

9. Click the **SAVE** button.



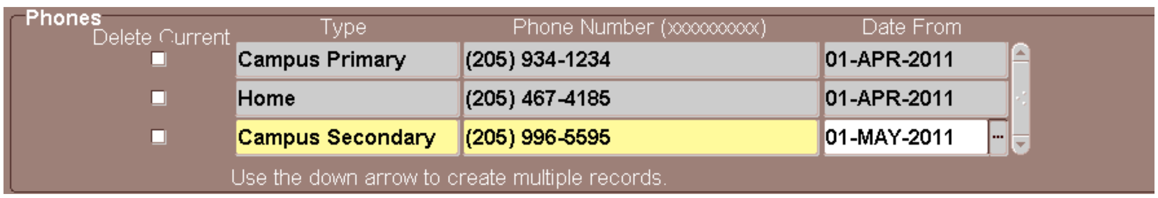
10. If adding additional phone numbers, click in the first blank **Type** field of the **Phones** region.



11. To add a **Campus Secondary** or **Tertiary** phone, click on the **Phone Type** LOV and select **Campus Secondary** or **Tertiary**; Click **OK**.

12. Enter ***the ten-digit number*** in the **Phone Number** field.

13. Choose the effective date from the Calendar LOV in the **Date From** field or type it directly into the field. This is will be the effective date of the Additional Assignment document.



14. Enter comments, if applicable, in the **Comments** field at the bottom of this form. Comments entered here will appear on the **ACT Main Form**. Click on the **Save** button.

15. Click on the **Return to Previous Form** button.

16. Click on the **Return to Previous Form** button to return to the ACT Main Form.

Entering Assignment Information

The Information on the **Assignment** form identifies the employee's employment status for this assignment, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting worked time to payroll.

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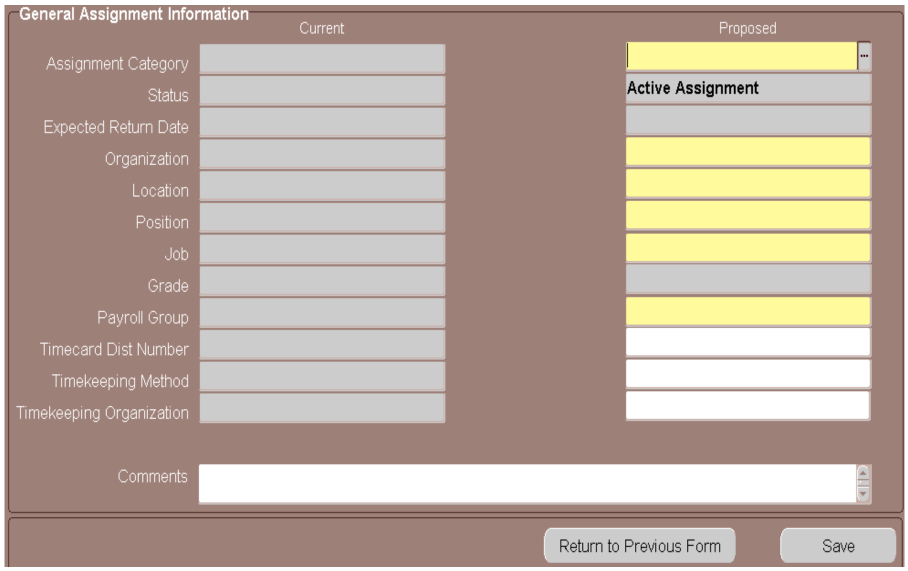
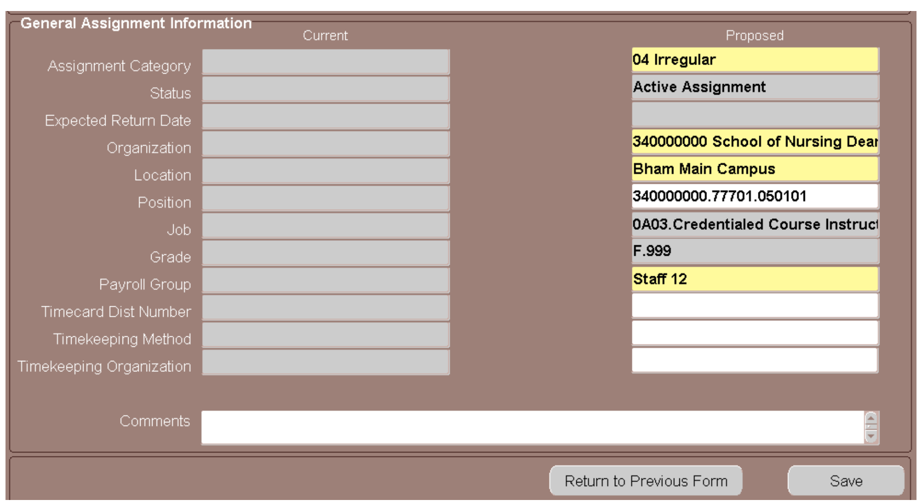
1. Click on the **Assignmen**t button on the bottom of the **ACT Main Form**.
2. Select ***the appropriate category*** from the **Assignment Category** LOV or type it in the field.
3. Click in the **Organization** field; type ***the appropriate organization*** in which the employee will be affiliated. Press **Enter**. The Location field will automatically populate.



4. Click in the **Position** field, select the **position code** from the position LOV. By entering the correct position, the **Location**, **Job** and **Grade** fields will be auto populated.
5. Type in the **Payroll Group** or use the LOV to enter the information.



6. If this is a biweekly assignment, enter the employee's timekeeping information.

    a. If the organization has designated several timekeeper approvers, the Workflow Officer for the organization may have assigned Timecard Distribution Numbers to each timekeeper. If timekeepers have these numbers, enter the ***timecard distribution number*** of the person to whom this employee's timesheet should be distributed to in the **TIMECARD DIST NUMBER** field.
    b. Enter ***TAMS*** (Hospital employees), ***DB*** (Design Build employees) or ***TEL*** (Time Entry, and Labor for the rest of the campus) in the **TIMEKEEPING METHOD FIELD** or use the LOV to enter the information.
    c. If the timekeeping organization is different from the appointing organization, enter the ***organization*** in the **TIMEKEEPING ORGANIZATION** field or select it from the LOV.

7. If this is a monthly assignment, leave the above three fields blank.

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

9. Click the **SAVE** button at the bottom of the form.

10. Click on the **SALARY** button located at the bottom of the **ASSIGNMENT** form.

Entering Salary Information

The Salary information should be completed before entering the Labor Sources data.

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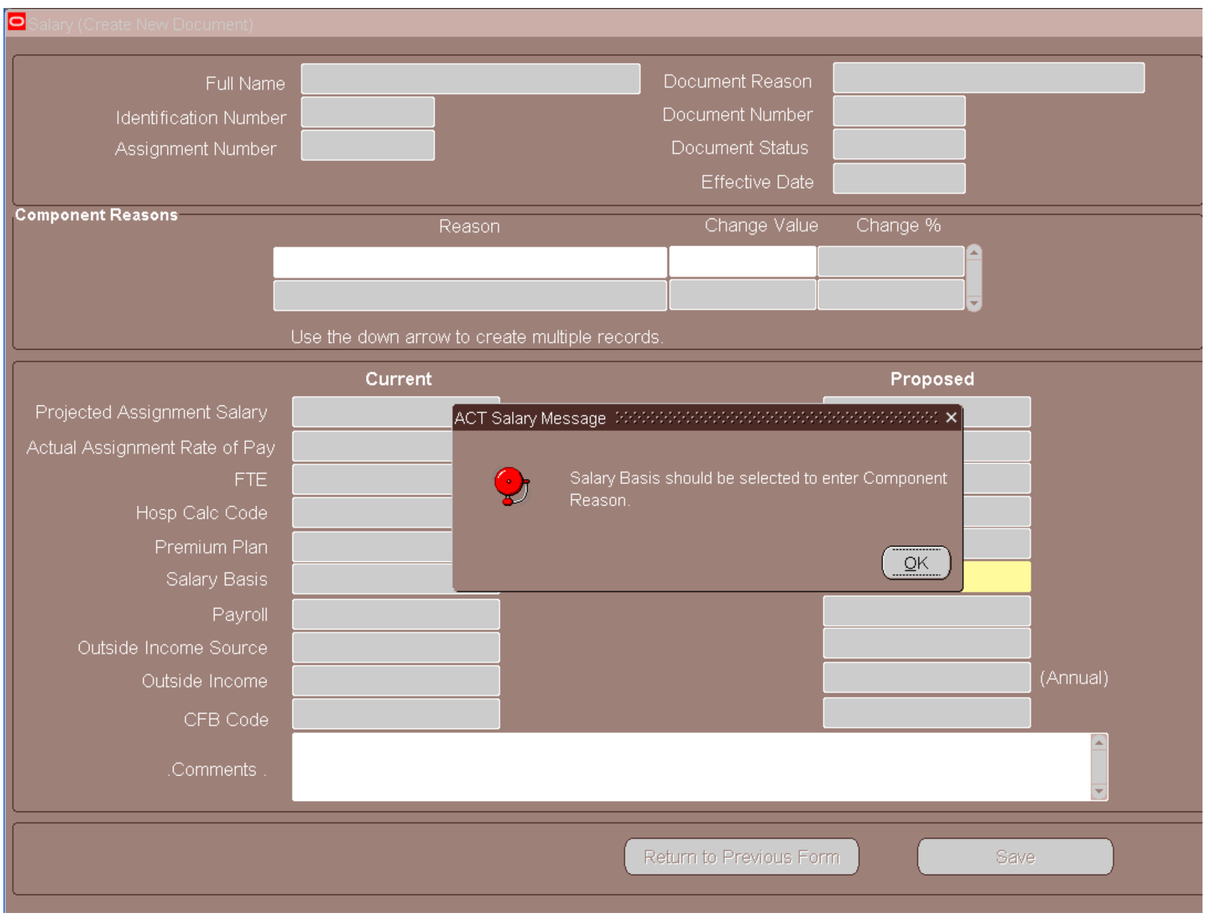
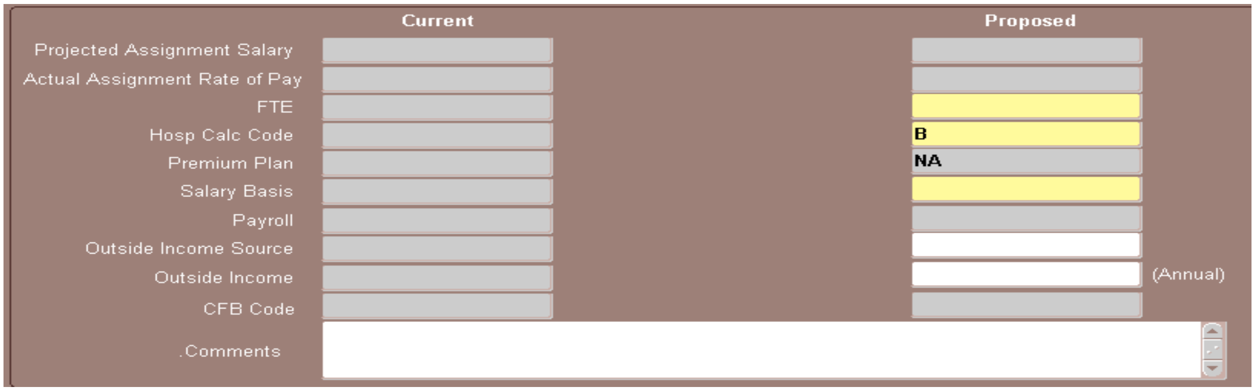
1. Click the **SALARY** button at the bottom of the **ACT MAIN FORM.** This will open the **SALARY** Form.

   ***Note*: Required field must be completed first. Yellow required fields will vary based on other field information such as Organization and Position. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.**

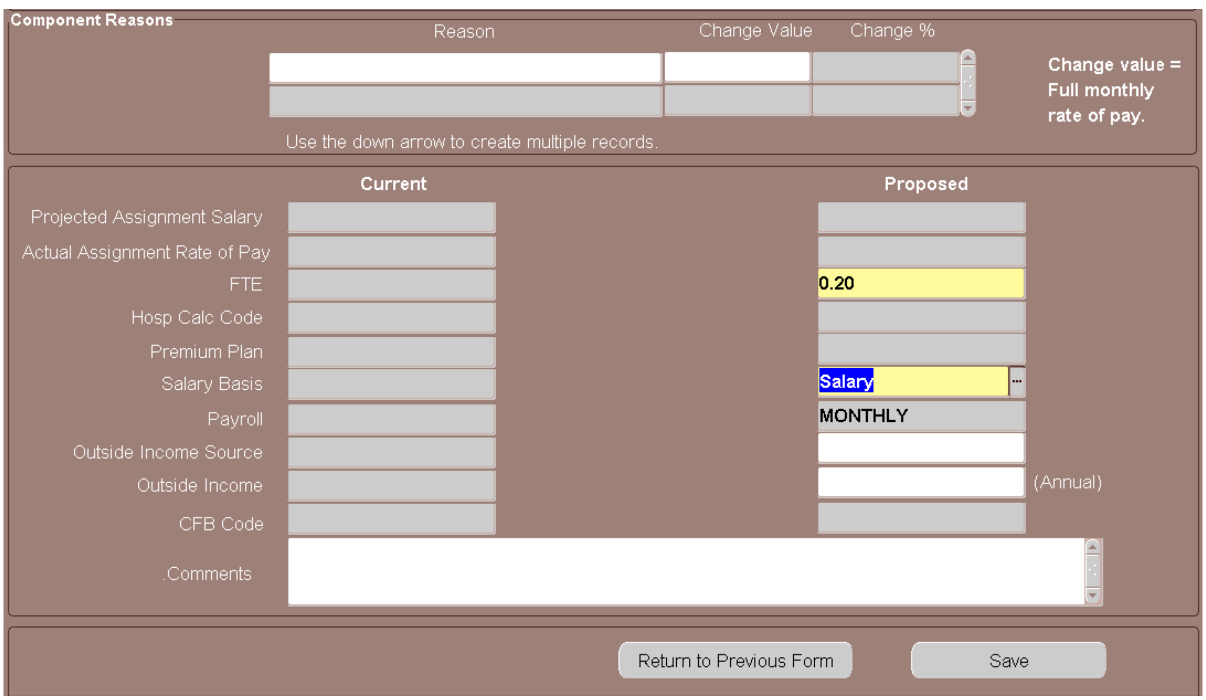
2. If required, using the **SALARY BASIS LOV** select the appropriate salary basis and click **OK**.



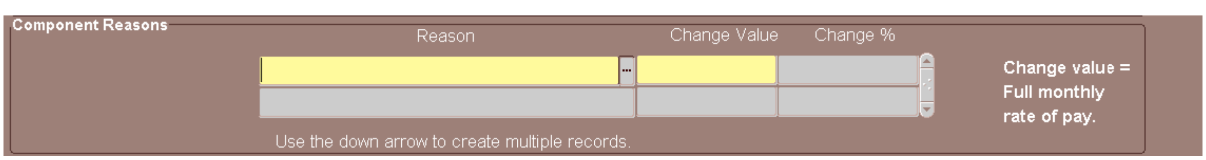
a. **HOSP CALC CODE** field is a required field for **Hospital Employees only**. Click on the Hosp Calc Code LOV and select **B** from the listing.



3. Enter the ***full-time equivalency*** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is ***strongly recommended*** that you enter this information for Records. For explanation of FTE ***click here***.



4. Click in the **REASON** field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields.

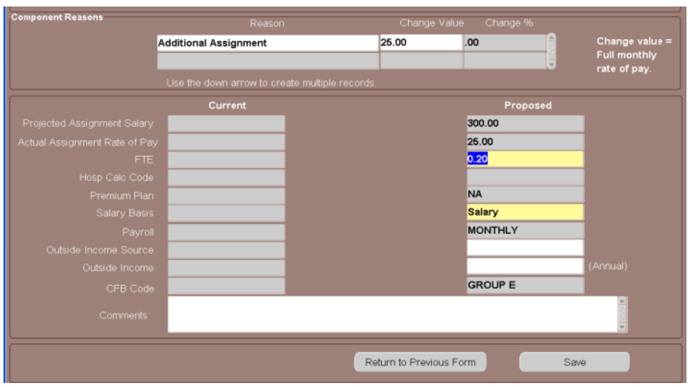


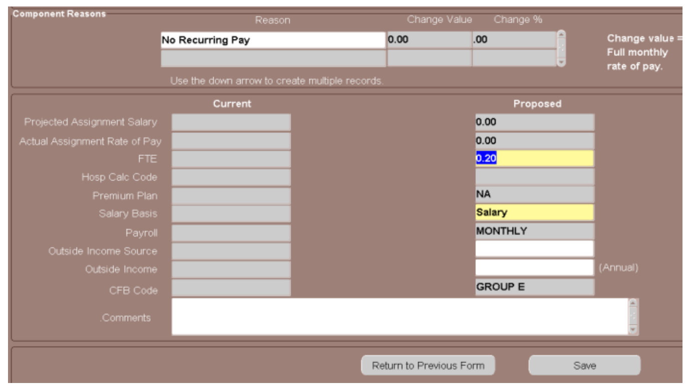
5. Select ***the appropriate reason*** from the LOV or type the information in the **REASON** field. If you selected:

    a. ***<u>Additional Assignment</u>***: Used when the employee working an Additional Assignment is to be paid through the normal Bi-weekly or Monthly Payroll.

    - Click in the **CHANGE VALUE** field; enter either the ***hourly rate*** (for a bi-weekly paid employee) or the ***monthly rate*** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered. Then continue with number 5.

    b. ***<u>No Recurring Pay</u>***: Used when the employee working an Additional Assignment is to be paid using a nonrecurring element.





6. Click on the **SAVE** button at the bottom of the **SALARY** form.

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

8. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM**.
    - For instructions on completing the **ELEMENT ENTRY FORM, *<u>click here</u>*.**

9. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK.**

Note: There are only two outside income sources -- <u>VA and Eye Foundation</u>.

10. Enter the ***amount of income provided by this source*** in the **OUTSIDE INCOME** field, if applicable. ***<u>This should be an annual amount</u>***.

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

12. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ASSIGNMENT** form.

13. Click the **LABOR SOURCE** button at the bottom of the **ASSIGNMENT** Form. ***Click here for instructions on entering Labor Source Information.***

Entering Element Entries

Additional Assignments being paid from a nonrecurring element can be submitted each month using a new nonrecurring element document or can be entered at the time the Additional Assignment document is created. If a known end date has been entered on the Person Data form, and the amount to be paid for the designated period of time has been determined, you may enter an element for each month the employee is to be paid on the Additional Assignment document.

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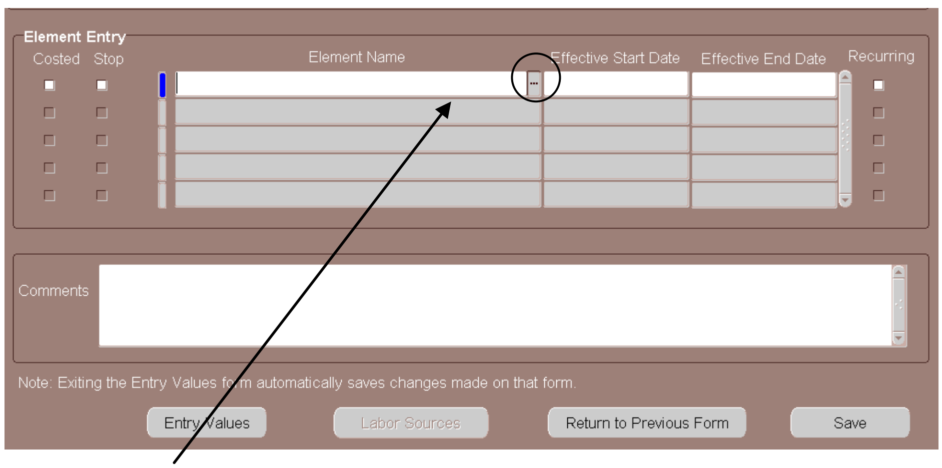
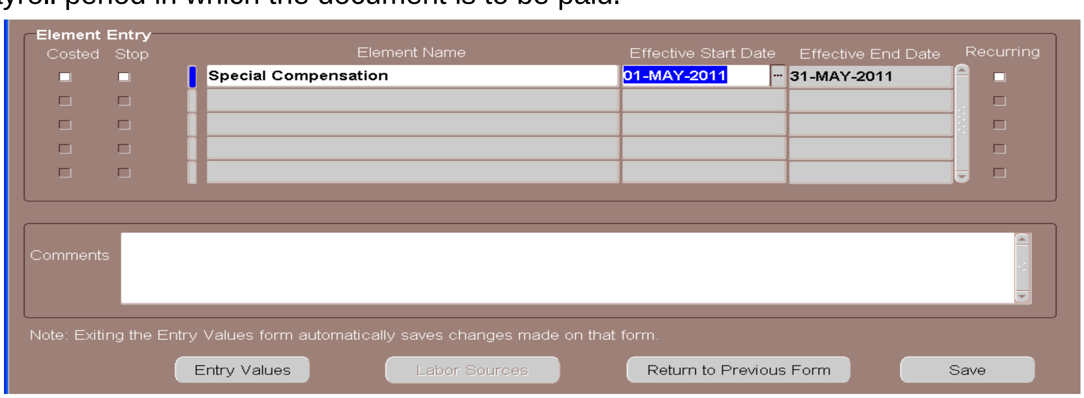
1. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM.**



2. Click on the LOV for the **ELEMENT NAME** field, and choose ***the appropriate element name.*** For a complete listing of available elements and descriptions go to the Financial Affairs webpage.
   Copy and paste link into URL:
   http://financialaffairs.uab.edu/content.asp?id=303268

3. The **EFFECTIVE START DATE** will be auto populated with the effective date of the document. The **EFFECTIVE END DATE** will be auto populated with the last day of the payroll period in which the document is to be paid.

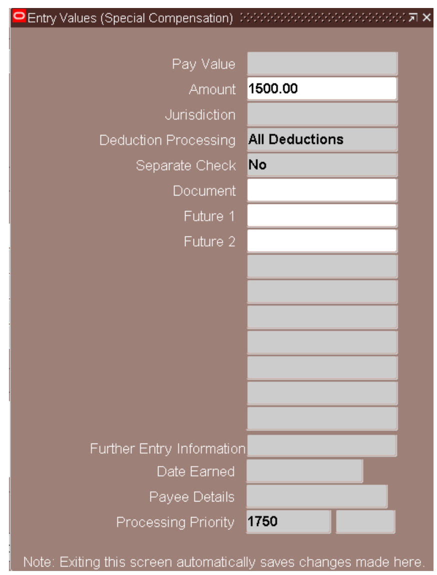


4. In the **COMMENTS** section enter ***a brief explanation of the payment and what services the individual provided to the University.***

5. Click on the **SAVE** button at the bottom of the form before clicking on the **ENTRY VALUES** button. ***If you do not save the screen before attempting to click on the* ENTRY VALUES *button, you will receive this error message*.**

6. Click on the **OK** button to return to the **ELEMENT** screen; click the **SAVE** button at the bottom of the form.

7. Click on the **ENTRY VALUE** button at the bottom of the form.



8. Click in the **AMOUNT** field and enter ***the monetary amount to be paid for the designated period of time***. The remaining fields will auto populate as needed.

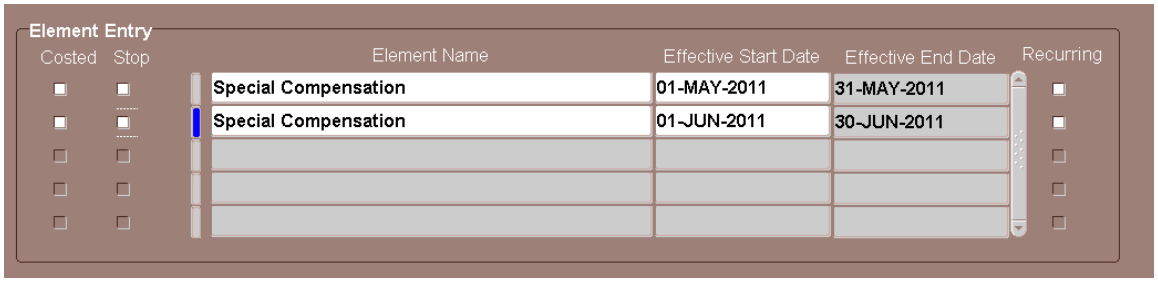
9. Click on the **X** to close and save this information.

   ***Note:* There is not a Save button on the Entry Values window. Exiting this screen automatically saves the changes.**

10. If submitting multiple payments, click in the next available line in the **ELEMENT NAME** field.

11. Click on the LOV for the **ELEMENT NAME** field, and choose ***the appropriate element name.***

12. Click in the **EFFECTIVE START DATE** field; enter ***the effective date of the next pay***. The effective **END DATE** field will populate with the appropriate end date.



13. Repeat Steps 4 through 10 for each subsequent month.

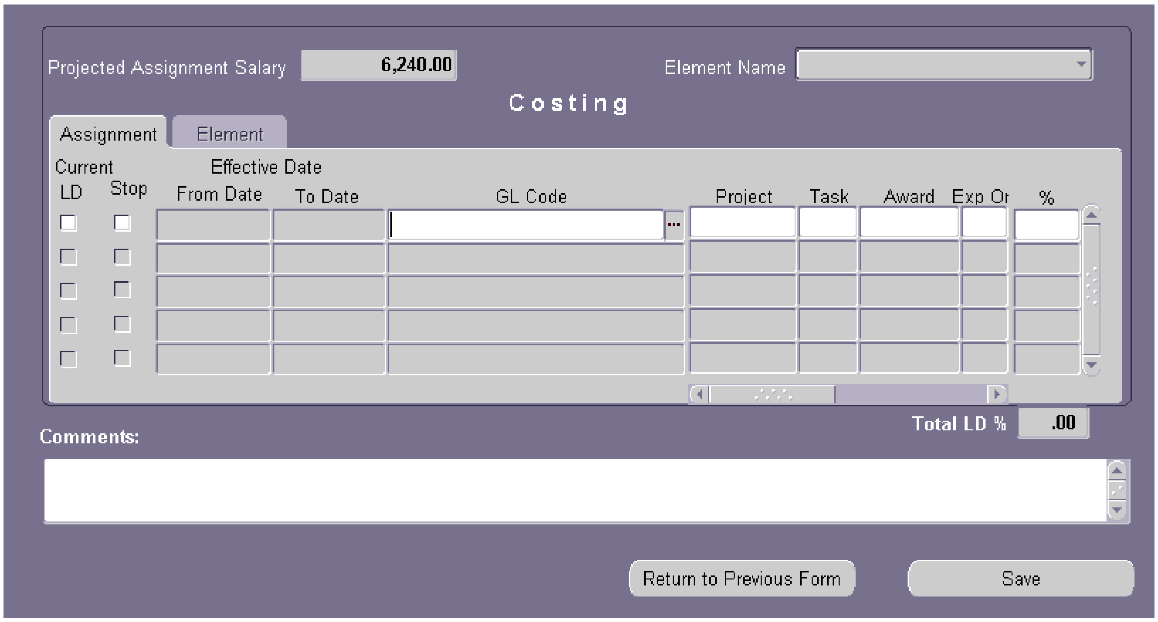
    Note: best practice is to limit element payments to no more than four monthly nonrecurring payments per ACT document.

14. Once all **ELEMENT ENTRIES** have been entered; click on the **LABOR SOURCE** button at the bottom of the **ELEMENT ENTRIES** form.

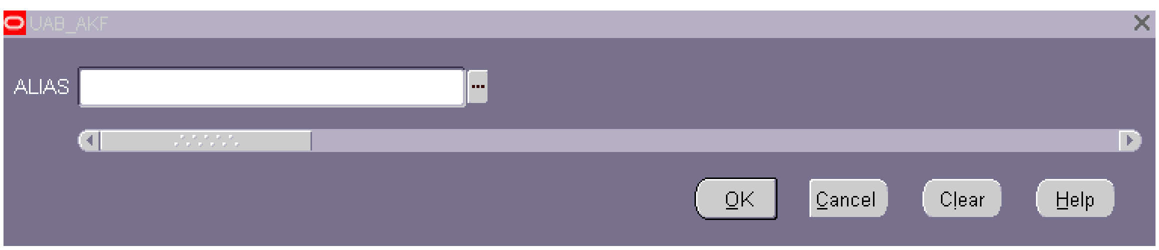
Entering Labor Source Information

The Labor Sources identifies what account string(s) the employee's salary will be costed (charged) to. Because the GL and GA account structures are different, there are differences in entering the account string data.

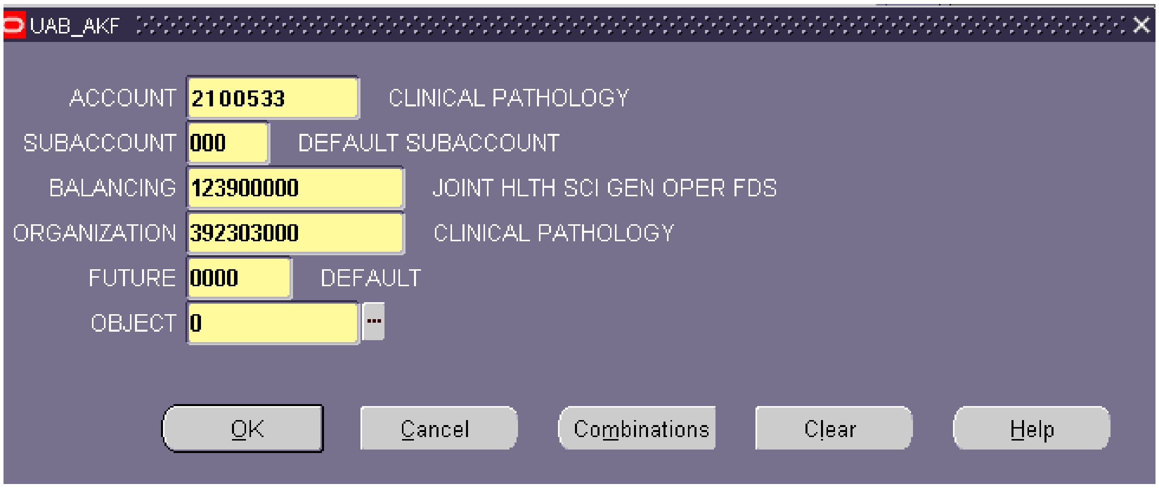
Entering General Ledger (GL) Information



1. Click on the **GL CODE** LOV. This opens the **UAB_AKF FIND** window.



2. 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.

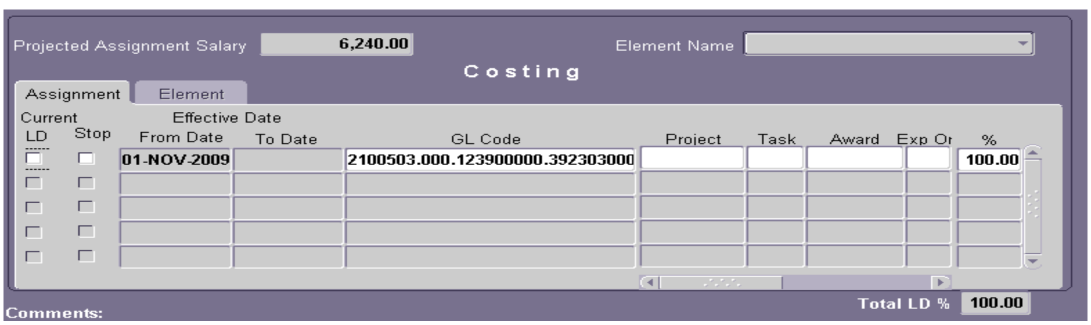


3. Click in the **OBJECT** field and enter ***Zero* (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.

4. 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.

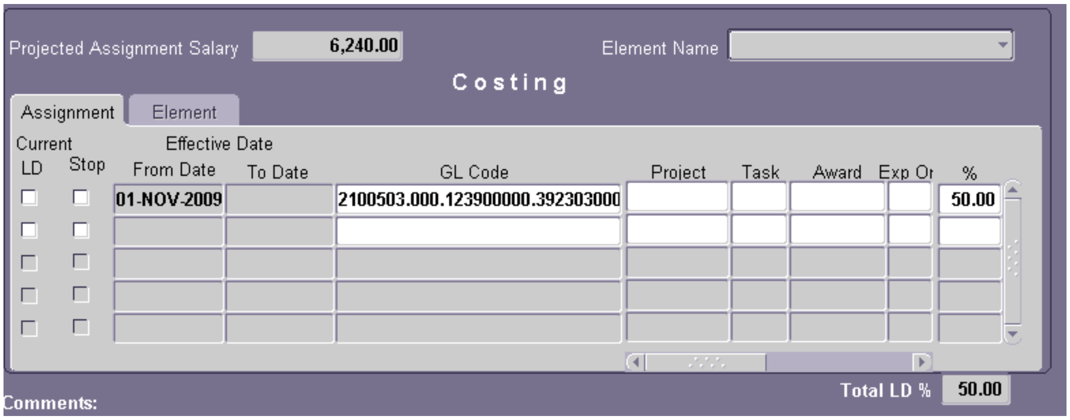
5. Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field must total **100%** before you can save the document.



6. Once the **TOTAL LD%** field equals 100%, click **SAVE**.

Entering Grant (GA) Funding Sources

7. Click one time in the **PROJECT** field of the next available row.



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.

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.

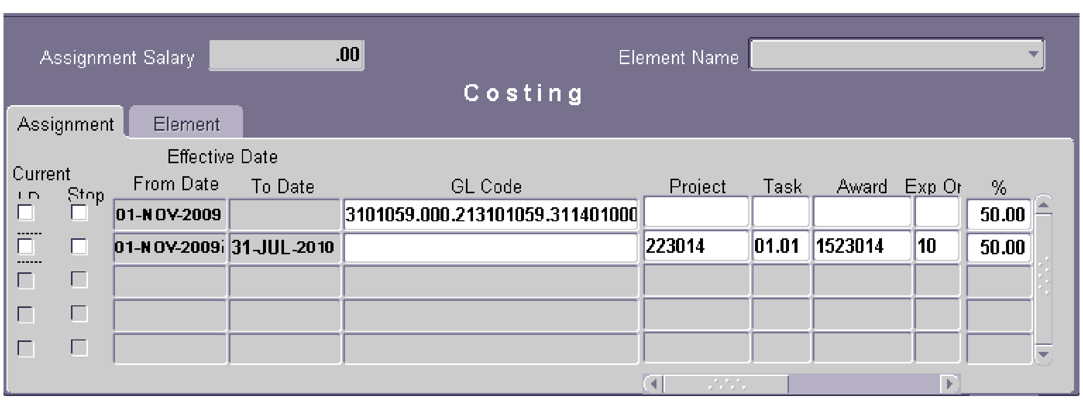
Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field.

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.

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

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



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

10. 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.

11. Click in the checkbox next to **ATTACHMENTS** if necessary.

12. Click the **SUBMIT** button at the bottom of the **ACT MAIN FORM**.

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