

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.

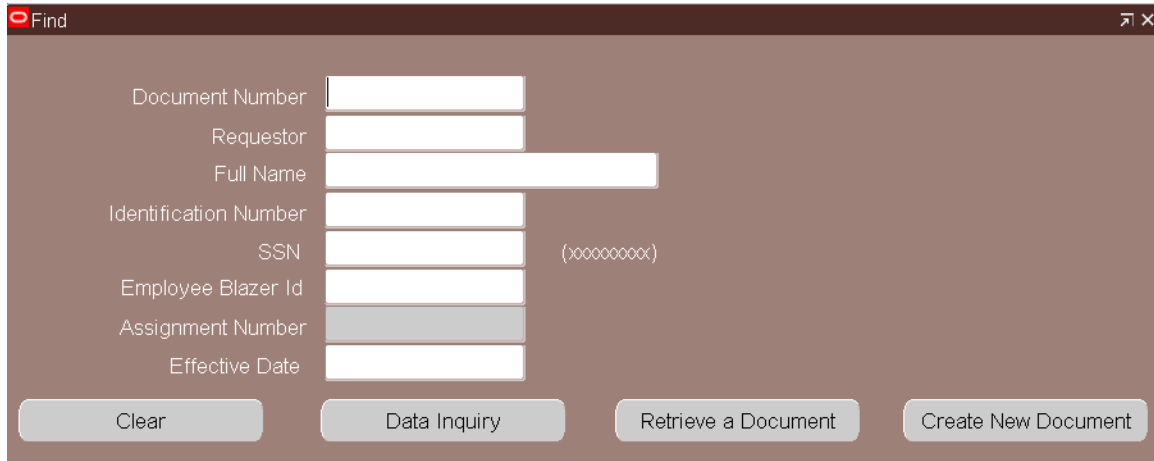
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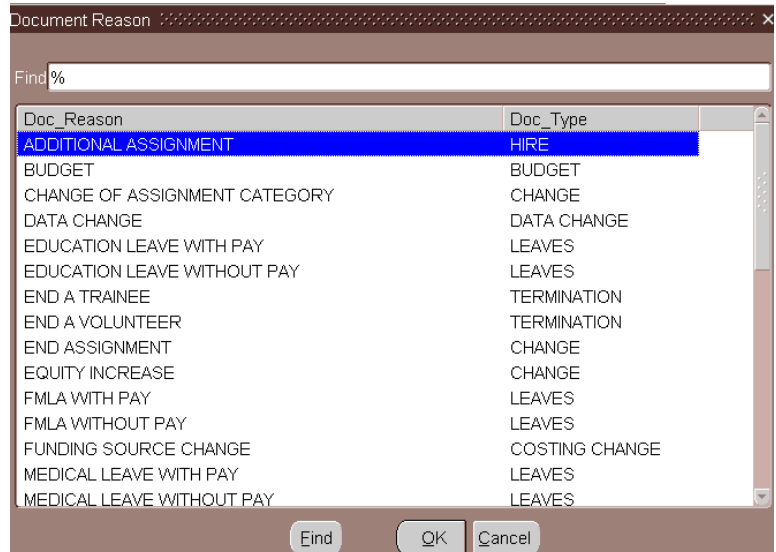
Creating an Additional Assignment (Primary Organization)

UAB HR Officer → HR Transactions → ACT → Find Window

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**.

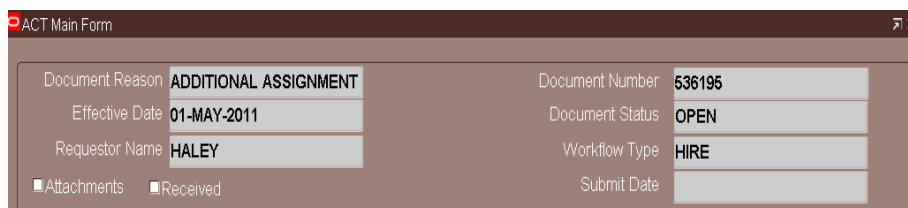


4. Enter the **effective date of the document** in the **EFFECTIVE DATE** field. Use the Calendar LOV or **type in the desired date**. Remember to use the **DD-MMM-YYYY** format.

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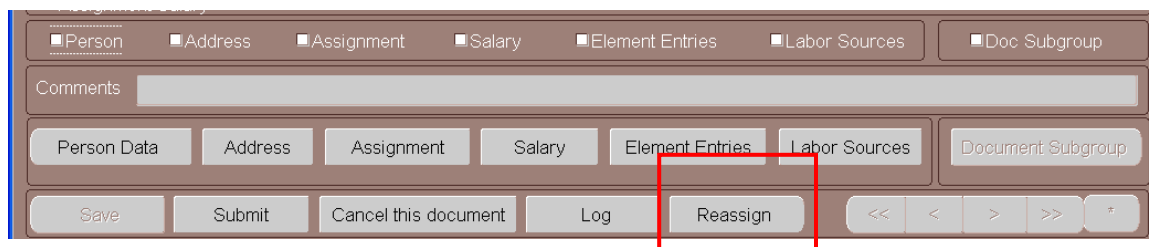
Note: The **Document Effective Date** for all bi-weekly paid employees receiving an Additional Assignment must be a Sunday. If the Labor Source(s) are changing, the **Document Effective Date** must be a future date that is beyond the current pay period for biweekly paid employees.

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



The screenshot shows the 'ACT Main Form' window. It contains several fields: 'Document Reason' is 'ADDITIONAL ASSIGNMENT', 'Effective Date' is '01-MAY-2011', 'Requestor Name' is 'HALEY', 'Document Number' is '536195', 'Document Status' is 'OPEN', 'Workflow Type' is 'HIRE', and 'Submit Date' is empty. There are also checkboxes for 'Attachments' and 'Received'.

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

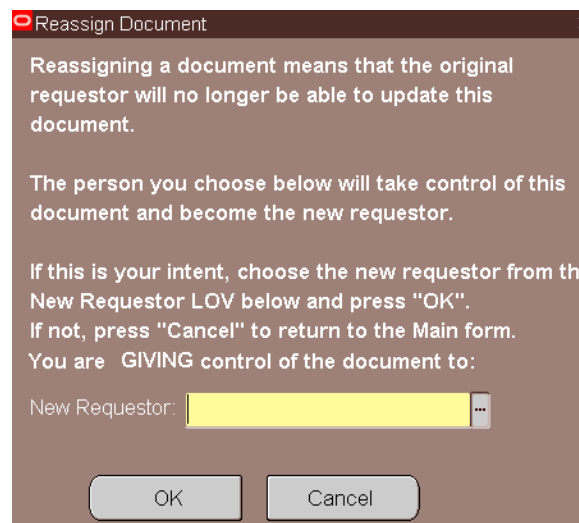


This screenshot shows the bottom section of the 'ACT Main Form'. It includes tabs for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. Below these are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign' (which is highlighted with a red box), and navigation buttons '<<', '<', '>', '>>', and '*'.

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**.



The screenshot shows a 'Reassign Document' dialog box. It contains the following text: 'Reassigning a document means that the original requestor will no longer be able to update this document.', 'The person you choose below will take control of this document and become the new requestor.', 'If this is your intent, choose the new requestor from the New Requestor LOV below and press "OK". If not, press "Cancel" to return to the Main form. You are GIVING control of the document to:'. Below this text is a 'New Requestor:' field with a yellow background and a dropdown arrow. At the bottom are 'OK' and 'Cancel' buttons.

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.



This screenshot shows the 'ACT Main Form' again, but now the 'Requestor Name' field displays 'PEBBLES' instead of 'HALEY'. All other fields remain the same as in the previous screenshot.

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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**.

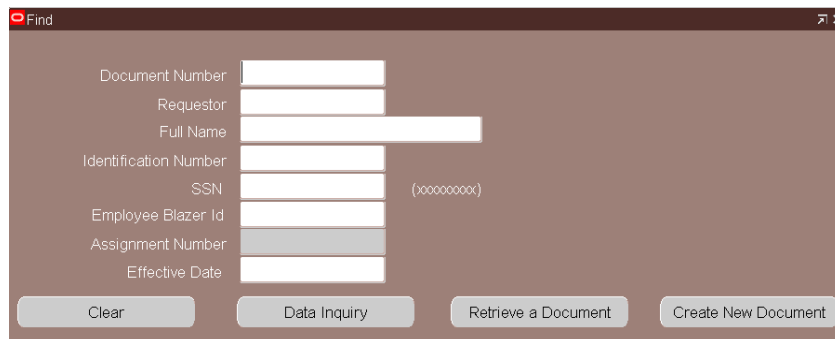
Note: *The original requestor will not have access to the document once it has been reassigned to the new requestor.*

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

Creating an Additional Assignment (Secondary Organization)

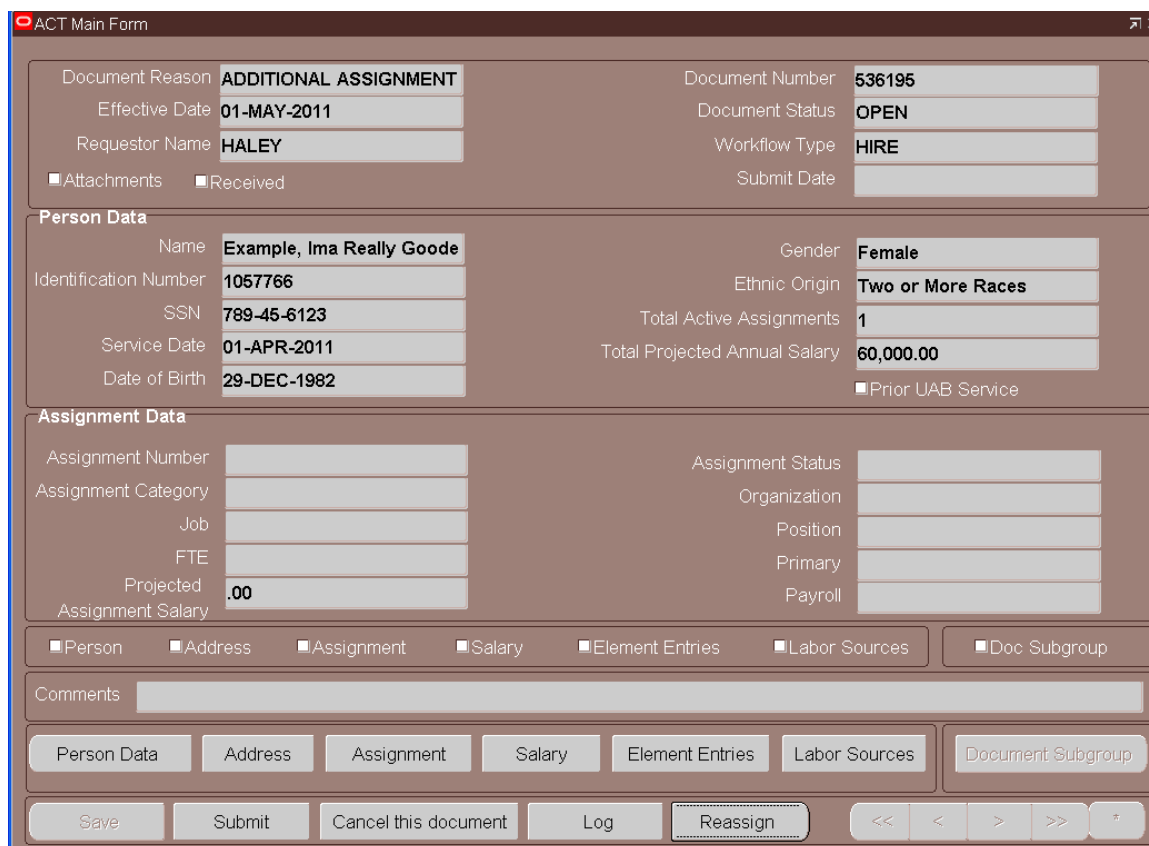
UAB HR Officer → HR Transactions → ACT → Find Window

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



The 'Find' window contains several input fields for searching documents. The fields are: Document Number, Requestor, Full Name, Identification Number, SSN (with a mask (x)xxxxxxx), Employee Blazer Id, Assignment Number, and Effective Date. Below the fields are four buttons: Clear, Data Inquiry, Retrieve a Document, and Create New Document.

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



The 'ACT Main Form' displays document and employee information. The top section shows Document Reason (ADDITIONAL ASSIGNMENT), Effective Date (01-MAY-2011), Requestor Name (HALEY), Document Number (536195), Document Status (OPEN), Workflow Type (HIRE), and Submit Date. Below this is the 'Person Data' section with fields for Name (Example, Ima Really Goode), Gender (Female), Identification Number (1057766), Ethnic Origin (Two or More Races), SSN (789-45-6123), Total Active Assignments (1), Service Date (01-APR-2011), Total Projected Annual Salary (60,000.00), and Date of Birth (29-DEC-1982). The 'Assignment Data' section includes Assignment Number, Assignment Category, Job, FTE, Projected Assignment Salary (.00), Assignment Status, Organization, Position, Primary, and Payroll. At the bottom, there are checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup, a Comments field, and a row of buttons: Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

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**.

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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 be 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.

The screenshot shows the 'PERSON DATA' form with the 'Termination' tab selected. The form is divided into two columns: 'Current' and 'Proposed'. The 'Current' column has fields for 'Actual Date', 'Projected Last Day', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. The 'Proposed' column has a field for 'Projected Last Day' with a dropdown arrow, and fields for 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. At the bottom, there is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

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

The screenshot shows the 'PERSON DATA' form with the 'Schools and Colleges' tab selected. The form displays a table with the following columns: 'School or College', 'Degree Name', 'Degree Date', 'Type', 'Transcript/Official Documentation on File', and 'Degree Discipline'. The first row contains the following data: 'University of Miami', '820 Doctor of Medicine', '07-JUN-1964', 'HD', 'Yes', and '51.12 - Medicin'. Below the table is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

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.

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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**.

School or College	Degree Name	Degree Date	Type	Official Degree Discipline
University of Miami	820 Doctor of Medicine	07-JUN-1964	HD	51.12 - Medicine (MD).
University of Alabama at Birmingham	780 PH.D. in Public Health	20-MAY-1974	OD	51.22 - Public Health.

Comments:

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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.

The screenshot shows the 'Address' form with two main sections: 'Current' and 'Proposed'. Each section has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' section is highlighted in yellow. At the bottom, there are instructions: 'Use the down arrow to view multiple records.' and 'Use the down arrow to create multiple records.'

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.

The screenshot shows the 'Address Types' LOV with a search bar and a list of types: Campus Primary, Campus Secondary (highlighted), Campus Tertiary, and Home. At the bottom are buttons for Find, OK, and Cancel.

The screenshot shows the 'Address' form with data entered in the 'Proposed' section. The fields are: Address Type: Campus Secondary, Building: AB, Room: B 91E2, Address Line3: ADMINISTRATION BUILDING, City: Birmingham, State: AL, Zip Code: 35294 - 1234. At the bottom, there are instructions: 'Use the down arrow to view multiple records.' and 'Use the down arrow to create multiple records.'

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

Phones		Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Delete Current	Campus Primary	(205) 934-1234	01-APR-2011
<input type="checkbox"/>		Home	(205) 467-4185	01-APR-2011
<input type="checkbox"/>				

Use the down arrow to create multiple records.

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.

Phones		Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Delete Current	Campus Primary	(205) 934-1234	01-APR-2011
<input type="checkbox"/>		Home	(205) 467-4185	01-APR-2011
<input type="checkbox"/>		Campus Secondary	(205) 996-5595	01-MAY-2011

Use the down arrow to create multiple records.

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.

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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.

1. Click on the **ASSIGNMENT** 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.

General Assignment Information	
Current	Proposed
Assignment Category	
Status	Active Assignment
Expected Return Date	
Organization	
Location	
Position	
Job	
Grade	
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	
Return to Previous Form Save	

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.

General Assignment Information	
Current	Proposed
Assignment Category	04 Irregular
Status	Active Assignment
Expected Return Date	
Organization	340000000 School of Nursing Dear
Location	Bham Main Campus
Position	340000000.77701.050101
Job	0A03.Credentialed Course Instruc
Grade	F.999
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	
Return to Previous Form Save	

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

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.

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

Entering Salary Information

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

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**.

The screenshot shows the 'ACT Salary (Create New Document)' form. At the top, there are input fields for Full Name, Identification Number, Assignment Number, Document Reason, Document Number, Document Status, and Effective Date. Below these is a 'Component Reasons' table with columns for Reason, Change Value, and Change %. A message below the table says 'Use the down arrow to create multiple records.' The main section of the form is divided into 'Current' and 'Proposed' columns. Fields include Projected Assignment Salary, Actual Assignment Rate of Pay, FTE, Hosp Calc Code, Premium Plan, Salary Basis, Payroll, Outside Income Source, Outside Income, CFB Code, and Comments. The 'Salary Basis' field in the 'Proposed' column is highlighted in yellow. An error message box is overlaid on the form, stating: 'ACT Salary Message: Salary Basis should be selected to enter Component Reason.' with an 'OK' button. At the bottom, there are 'Return to Previous Form' and 'Save' buttons.

Component Reasons		
Reason	Change Value	Change %

	Current	Proposed
Projected Assignment Salary		
Actual Assignment Rate of Pay		
FTE		
Hosp Calc Code		
Premium Plan		
Salary Basis		
Payroll		
Outside Income Source		
Outside Income		
CFB Code		
Comments		

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

- 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.

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

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](#).

Component Reasons	Reason	Change Value	Change %
Use the down arrow to create multiple records.			

	Current	Proposed
Projected Assignment Salary		
Actual Assignment Rate of Pay		
FTE		0.20
Hosp Calc Code		
Premium Plan		
Salary Basis		Salary
Payroll		MONTHLY
Outside Income Source		
Outside Income		(Annual)
CFB Code		
.Comments		

Return to Previous Form
Save

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

Component Reasons	Reason	Change Value	Change %
Use the down arrow to create multiple records.			

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

5. Select **the appropriate reason** from the LOV or type the information in the **REASON** field. If you selected:
 - a. **Additional Assignment**: 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. **No Recurring Pay**: Used when the employee working an Additional Assignment is to be paid using a nonrecurring element.

Component Reasons	
Reason	Change Value Change %
Additional Assignment	25.00 .00
Use the down arrow to create multiple records.	
Projected Assignment Salary	300.00
Actual Assignment Rate of Pay	25.00
FTE	0.20
Hosp Calc Code	
Premium Plan	NA
Salary Basis	Salary
Payroll	MONTHLY
Outside Income Source	
Outside Income	(Annual)
CFB Code	GROUP E
Comments	
<div style="text-align: right;"> <input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/> </div>	

Component Reasons	
Reason	Change Value Change %
No Recurring Pay	0.00 .00
Use the down arrow to create multiple records.	
Projected Assignment Salary	0.00
Actual Assignment Rate of Pay	0.00
FTE	0.20
Hosp Calc Code	
Premium Plan	NA
Salary Basis	Salary
Payroll	MONTHLY
Outside Income Source	
Outside Income	(Annual)
CFB Code	GROUP E
Comments	
<div style="text-align: right;"> <input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/> </div>	

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**, [click here](#).
 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 -- VA and Eye Foundation.**
10. Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
 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.

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

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.

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

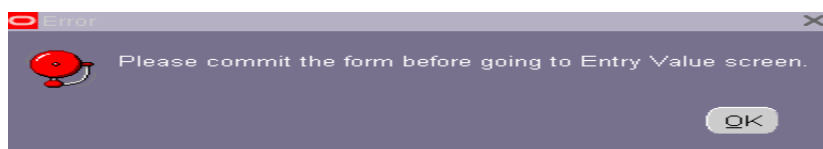
2. Click on the LOV for the **ELEMENT NAME** field, and choose **the appropriate element name**. For a complete listing of available elements and descriptions go to the Financial Affairs webpage.
Copy and paste link into URL:
<http://financialaffairs.uab.edu/content.asp?id=303268>
3. The **EFFECTIVE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

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

Comments Teaching a class for the spring semester.

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.**

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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.

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Special Compensation	01-MAY-2011	31-MAY-2011	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Special Compensation	01-JUN-2011	30-JUN-2011	<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"/>

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.

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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

The screenshot shows the 'Costing' window. At the top, 'Projected Assignment Salary' is 6,240.00 and 'Element Name' is a dropdown. Below is a table with columns: Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. There are five rows in the table. At the bottom right, 'Total LD %' is .00. Below the table is a 'Comments:' text area. At the bottom are 'Return to Previous Form' and 'Save' buttons.

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

The screenshot shows the 'UAB_AKF FIND' window. It has a title bar with a red icon and 'UAB_AKF'. Below the title bar is an 'ALIAS' field with a dropdown arrow. Below the field is a horizontal scrollbar. At the bottom are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

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.

Appoint, Change and Terminate (ACT) Documentation Additional Assignment

UAB_AKF

ACCOUNT: 2100533 CLINICAL PATHOLOGY

SUBACCOUNT: 000 DEFAULT SUBACCOUNT

BALANCING: 123900000 JOINT HLTH SCI GEN OPER FDS

ORGANIZATION: 392303000 CLINICAL PATHOLOGY

FUTURE: 0000 DEFAULT

OBJECT: 0

Buttons: OK, Cancel, Combinations, Clear, Help

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.

Projected Assignment Salary: 6,240.00

Element Name: [Dropdown]

Costing

Assignment | Element

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009		2100503.000.123900000.392303000					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

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

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Entering Grant (GA) Funding Sources

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

The screenshot shows the 'Costing' section of the ACT form. At the top, 'Projected Assignment Salary' is 6,240.00 and 'Element Name' is a dropdown. Below are tabs for 'Assignment' and 'Element'. The 'Current' tab is active, showing a table with columns: LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The first row has '01-NOV-2009' for From Date, '2100503.000.123900000.392303000' for GL Code, and '50.00' for %. The 'Total LD %' at the bottom right is 50.00.

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**.

The screenshot shows the 'Costing' section with two rows in the table. The first row has '01-NOV-2009' for From Date, '3101059.000.213101059.311401000' for GL Code, and '50.00' for %. The second row has '01-NOV-2009' for From Date, '31-JUL-2010' for To Date, '223014' for Project, '01.01' for Task, '1523014' for Award, '10' for Exp Or, and '50.00' for %.

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

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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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