

## **Appoint, Change and Terminate (ACT) Documentation**

### **Processing a Medical Leave of Absence with pay and without pay**

The following documentation explains how to process a Medical Leave of Absence where a portion of the leave is with pay and a portion of the leave is without pay.

**Scenario:** *Ima Really Goode Example Sr has been approved for a Medical Leave of Absence effective July 5, 2011 through August 28, 2011. She has enough accrued benefit time to be paid through July 31, 2011. She will return to work on August 29, 2011.*

Accrued sick leave, personal holidays and vacation time must be paid at the beginning of the medical leave of absence before entering a "non-paid status". When an employee has accrued benefit time available, **(Step One)** a **Medical Leave with Pay Document** must be created for the period of time in which the employee will receive pay. Once the employee's accrued benefit time is exhausted, the employee will no longer receive a paycheck from UAB and must be placed in a "non-paid status". **(Step Two)** A **Medical Leave without Pay Document** must be created for the duration of the medical leave of absence.

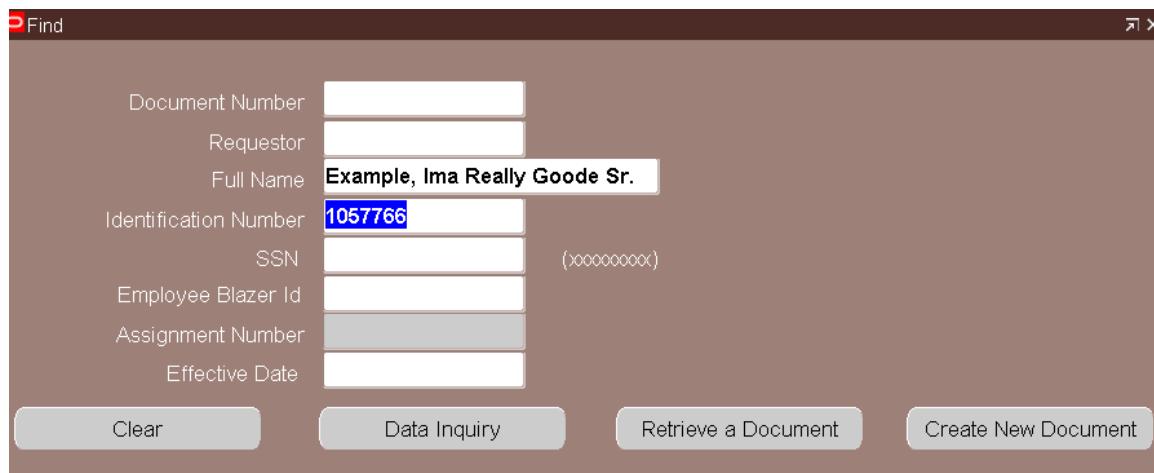
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**UAB HR Officer → HR Transactions → ACT → Find Window**

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#### **(Step One): Creating a Medical Leave with Pay Document**

1. Use the **FIND WINDOW** to locate the employee.



The screenshot shows the 'Find' window with the following data entered:

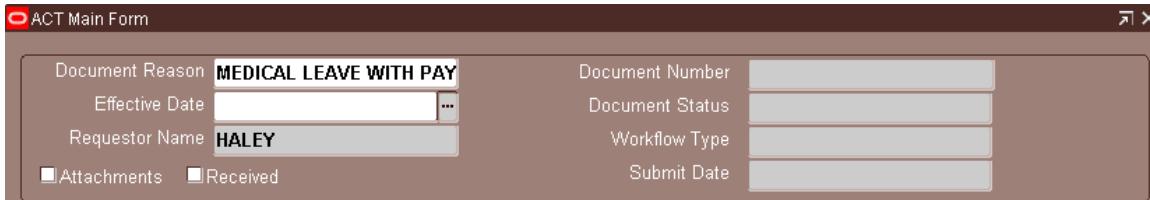
Document Number	
Requestor	
Full Name	Example, Ima Really Goode Sr.
Identification Number	1057766
SSN	(xxxxxx)
Employee Blazer Id	
Assignment Number	
Effective Date	

Buttons at the bottom: Clear, Data Inquiry, Retrieve a Document, Create New Document.

2. Click on the **CREATE NEW DOCUMENT** button.
3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.

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4. Use the **DOCUMENT REASON** LOV to choose **MEDICAL LEAVE WITH PAY** or type the words **Medical Leave with Pay** in the **DOCUMENT REASON** field.



ACT Main Form

Document Reason	<b>MEDICAL LEAVE WITH PAY</b>	Document Number	
Effective Date		Document Status	
Requestor Name	<b>HALEY</b>	Workflow Type	
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	

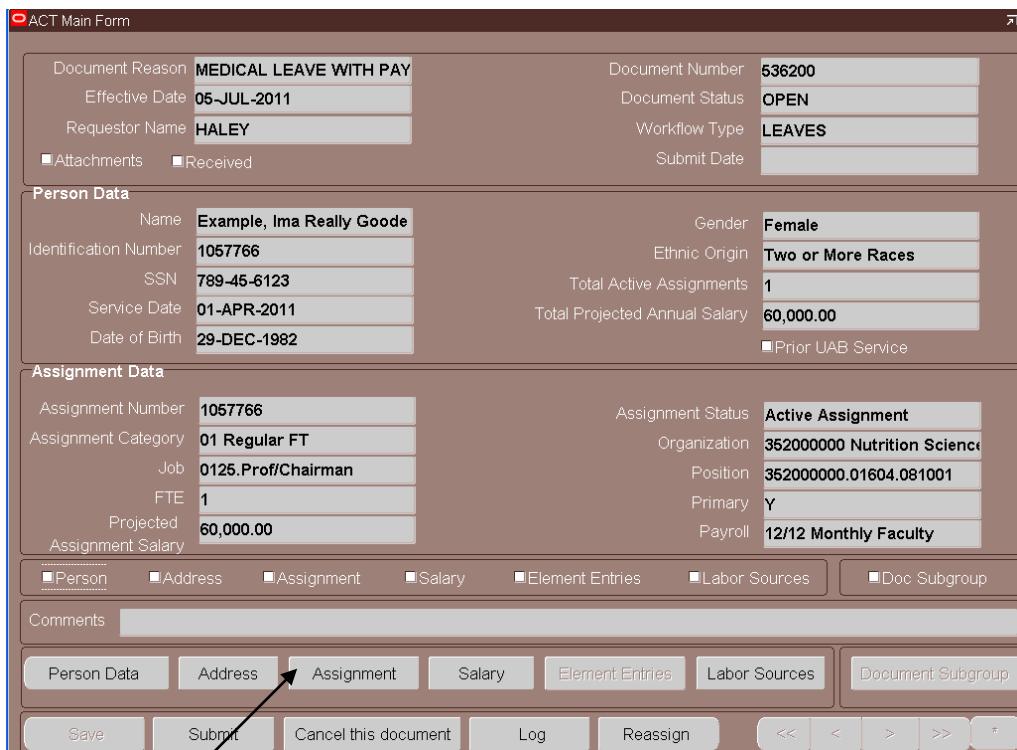
5. Click inside the **EFFECTIVE DATE** field, choose and effective date from the Calendar LOV or type in the **desired date**. Remember to use the **DD-MMM-YYYY** format.



ACT Main Form

Document Reason	<b>MEDICAL LEAVE WITH PAY</b>	Document Number	
Effective Date	<b>05-JUL-2011</b>	Document Status	
Requestor Name	<b>HALEY</b>	Workflow Type	
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	

6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The Administrative System will automatically generate a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** field will be **OPEN**.



ACT Main Form

Document Reason	<b>MEDICAL LEAVE WITH PAY</b>	Document Number	<b>536200</b>
Effective Date	<b>05-JUL-2011</b>	Document Status	<b>OPEN</b>
Requestor Name	<b>HALEY</b>	Workflow Type	<b>LEAVES</b>
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	

**Person Data**

Name	<b>Example, Ima Really Goode</b>	Gender	<b>Female</b>
Identification Number	<b>1057766</b>	Ethnic Origin	<b>Two or More Races</b>
SSN	<b>789-45-6123</b>	Total Active Assignments	<b>1</b>
Service Date	<b>01-APR-2011</b>	Total Projected Annual Salary	<b>60,000.00</b>
Date of Birth	<b>29-DEC-1982</b>	<input type="checkbox"/> Prior UAB Service	

**Assignment Data**

Assignment Number	<b>1057766</b>	Assignment Status	<b>Active Assignment</b>
Assignment Category	<b>01 Regular FT</b>	Organization	<b>352000000 Nutrition Sciences</b>
Job	<b>0125.Prof/Chairman</b>	Position	<b>352000000.01604.081001</b>
FTE	<b>1</b>	Primary	<b>Y</b>
Projected Assignment Salary	<b>60,000.00</b>	Payroll	<b>12/12 Monthly Faculty</b>

Comments:

Person   Address   **Assignment**   Salary   Element Entries   Labor Sources   Document Subgroup

Save   Submit   Cancel this document   Log   Reassign   <<   <   >   >>   \*

7. Click on the **ASSIGNMENT** button from the **ACT MAIN FORM**. The **ASSIGNMENT FORM** will open.

## Appoint, Change and Terminate (ACT) Documentation Processing a Medical Leave of Absence with pay and without pay

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		
Expected Return Date			
Organization	35200000 Nutrition Sciences Cha		
Location	Bham Main Campus		
Position	35200000.01604.081001		
Job	0125.Prof/Chairman		
Grade	F.999		
Payroll Group	Faculty 12		
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Comments			
		Return to Previous Form	Save

8. Click in the **EXPECTED RETURN DATE** field. Enter the date the employee will enter into a “non-paid status” using the calendar LOV.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		
Expected Return Date	01-AUG-2011		
		Leave With Pay	...

***Note: This date is determined by adding the employee's benefit time accrual balances and updates the employee will receive during the with pay portion of the leave of absence. Once all accrued and earned benefit time has been paid, the employee will enter a “non-paid” status.***

9. Enter similar comment in the **COMMENTS** field at the bottom of the **ASSIGNMENT** form. Comments entered here will appear on the **ACT MAIN FORM**.

Comments	Will enter a without pay status starting 01-Aug-2011.
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10. Click on the **SAVE** button at the bottom of the **ASSIGNMENT** form.

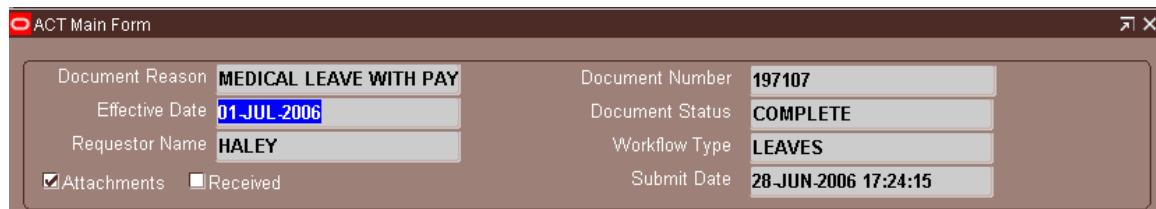
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

12. Click in the **ATTACHMENT** box; a **Check mark** will appear. **Attachments are required for all Medical Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**

ACT Main Form			
Document Reason	MEDICAL LEAVE WITH PAY		
Effective Date	05-JUL-2011		
Requestor Name	HALEY		
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Document Number	536200
		Document Status	OPEN
		Workflow Type	LEAVES
		Submit Date	

## **Appoint, Change and Terminate (ACT) Documentation Processing a Medical Leave of Absence with pay and without pay**

13. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. A **NOTE** appears. Click **OK**. Print the **ACT MAIN FORM**; attach to the front of attachments being routed to HRM Records Administration for approval.
14. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.
15. Once the **MEDICAL LEAVE WITH PAY** document is approved through the Workflow Approval Path the Document Status changes to “**COMPLETE**”



The screenshot shows the 'ACT Main Form' window with the following data:

Document Reason	MEDICAL LEAVE WITH PAY	Document Number	197107
Effective Date	01-JUL-2006	Document Status	COMPLETE
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	28-JUN-2006 17:24:15

Proceed onto **Step Two: Creating a Medical Leave without Pay Document.**

## Appoint, Change and Terminate (ACT) Documentation Processing a Medical Leave of Absence with pay and without pay

### **Step Two: Creating a Medical Leave without Pay Document**

1. Use the **FIND WINDOW** to locate the employee.



The Find window dialog box is shown. It contains fields for Document Number, Requestor, Full Name (set to 'Example, Ima Really Goode Sr.'), Identification Number (set to '1057766'), SSN, Employee Blazer Id, Assignment Number, and Effective Date. Below the fields are buttons for Clear, Data Inquiry, Retrieve a Document, and Create New Document. The 'Create New Document' button is highlighted.

2. Click on the **CREATE NEW DOCUMENT** button.
3. The **ACT MAIN FORM** will open. Click once in the **DOCUMENT REASON** field.
4. Use the **DOCUMENT REASON LOV** to choose **MEDICAL LEAVE WITHOUT PAY** or type the words ***Medical Leave without Pay*** in the **DOCUMENT REASON** field.



The ACT Main Form dialog box is shown. It has several sections: **Document Reason** (set to 'MEDICAL LEAVE WITHOUT'), **Effective Date**, **Requestor Name** (set to 'HALEY'), **Attachments**, **Received**, **Person Data** (Name, Identification Number, SSN, Latest Hire Date, Date of Birth), **Assignment Data** (Assignment Number, Assignment Category, Job, FTE, Assignment Salary), **Document Number**, **Document Status**, **Workflow Type**, **Submit Date**, **Gender**, **Ethnic Origin**, **Total Active Assignments**, **Total Annual Salary**, **Prior UAB Service**, **Comments**, and a footer with buttons for **Save**, **Submit**, **Cancel this document**, **Log**, **Reassign**, and navigation arrows.

## Appoint, Change and Terminate (ACT) Documentation Processing a Medical Leave of Absence with pay and without pay

5. Click inside the **EFFECTIVE DATE** field. The effective date will be the date entered in the **EXPECTED RETURN DATE** field on the **LEAVE WITH PAY** document. Remember to use the **DD-MMM-YYYY** format.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		Leave With Pay
Expected Return Date			01-AUG-2011

ACT Main Form			
Document Reason	MEDICAL LEAVE WITHOUT	Document Number	
Effective Date	01-AUG-2011	Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	

6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The Administrative System will automatically generate a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** field will be **OPEN**.

Document Reason	MEDICAL LEAVE WITHOUT	Document Number	536201																				
Effective Date	01-AUG-2011	Document Status	OPEN																				
Requestor Name	HALEY	Workflow Type	LEAVES																				
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date																					
<b>Person Data</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td>Name</td> <td>Example, Ima Really Goode</td> <td>Gender</td> <td>Female</td> </tr> <tr> <td>Identification Number</td> <td>1057766</td> <td>Ethnic Origin</td> <td>Two or More Races</td> </tr> <tr> <td>SSN</td> <td>789-45-6123</td> <td>Total Active Assignments</td> <td>1</td> </tr> <tr> <td>Service Date</td> <td>01-APR-2011</td> <td>Total Projected Annual Salary</td> <td>60,000.00</td> </tr> <tr> <td>Date of Birth</td> <td>29-DEC-1982</td> <td colspan="2"> <input type="checkbox"/>Prior UAB Service         </td> </tr> </tbody> </table>				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	Date of Birth	29-DEC-1982	<input type="checkbox"/> Prior UAB Service	
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**Note:** *Assignment Status field currently displays the employee in a "Leave with Pay" status.*

7. Click on the **ASSIGNMENT** button from the **ACT MAIN FORM**. The **ASSIGNMENT FORM** will open.

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General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Leave With Pay		
Expected Return Date	01-AUG-2011		
Organization	352000000 Nutrition Sciences Cha		
Location	Bham Main Campus		
Position	352000000.01604.081001		
Job	0125.Prof/Chairman		
Grade	F.999		
Payroll Group	Faculty 12		
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Comments			
		Return to Previous Form	Save

**Notice: EFFECTIVE DATE of Document and CURRENT EXPECTED RETURN DATE are the same date.**

***Note: The CURRENT STATUS field displays LEAVE WITH PAY indicating the employee is in a “pay status”; this document will move the employee into a “non-paid status” as displayed in the PROPOSED STATUS field LEAVE WITHOUT PAY.***

8. Click in the **EXPECTED RETURN DATE** field. Enter the **expected return to work date** for the employee using the calendar LOV.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Leave With Pay		
Expected Return Date	01-AUG-2011		
	29-AUG-2011		

***Note: Entering the date in the EXPECTED RETURN DATE field does not automatically return the employee from leave. You will need to process a Return from Leave document before the employee will be returned to a “Pay Status”. The employee will not be paid until the Return from Leave document is in “Complete” status.***

9. Enter Comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
10. Click on the **SAVE** button.
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
12. Click in the **ATTACHMENT** box; a **Check mark** will appear. **Attachments are required for all Medical Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**

## Appoint, Change and Terminate (ACT) Documentation Processing a Medical Leave of Absence with pay and without pay



The screenshot shows the 'ACT Main Form' window. It contains several input fields and status indicators. On the left, there are three rows of text input fields: 'Document Reason' (MEDICAL LEAVE WITHOUT PAY), 'Effective Date' (01-AUG-2011), and 'Requestor Name' (HALEY). On the right, there are four rows of status indicators: 'Document Number' (536201), 'Document Status' (OPEN), 'Workflow Type' (LEAVES), and 'Submit Date' (empty). At the bottom left, there are two checkboxes: one checked for 'Attachments' and one unchecked for 'Received'.

13. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**.
14. Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to HRM Records Administration for approval.
15. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.

[\*\*RETURN TO TOP\*\*](#)