

## Appoint, Change and Terminate (ACT) Documentation

### Creating a Merit Increase ACT Document

The **Merit Increase** document reason is used when processing salary increases based upon performance or achievement at a time period other than October 1 of the fiscal year.

The **Merit Increase Document Effective Date** will be determined by University or Hospital Administration. Salary and effective date guidelines will be dispersed to appropriate departments as necessary. Guidelines addressing exceptions or Fixed Increment Payments will also be dispersed to departments as necessary.

When creating a **Merit Increase** ACT document, you should only have to change the **SALARY** form. However, the **LABOR SOURCES** form is open for update in case the funds will be coming from another source.

- When changing an employee's **LABOR SOURCE** on a **Merit Increase** document, the effective date of the **Merit Increase** document **must be a future pay period**.
- When processing a **Merit Increase** document with a **retro active** effective date (a date in which the payroll has already processed), you **will be allowed to change** the employee's Labor Source; however, the effective date of the labor source change will default to the next available pay period. **In order to correct the labor source for past pay periods, you will need to complete the Salary Reclass Form.**
- If you need to change an employee's Labor Source **prior** to the **Merit Increase Document Effective Date**, a **Funding Source Change Document** must be submitted and approved **before** creating the **Merit Increase** document.
- Once an employee's **Merit Increase** document has entered "**COMPLETE**", a **Funding Source Change Document** with an effective date prior to the **Merit Increase** **may not be created**.

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UAB HR Officer → HR Transactions → ACT → Find Window

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

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

The screenshot shows a web form titled "Find" with a search bar and several input fields. The fields are: Document Number, Requestor, Full Name (with the value "Example, One"), Identification Number (with the value "1013787"), SSN (with a placeholder "(xxxxxxxxx)"), Employee Blazer Id, Assignment Number (with the value "1013787"), and Effective Date. At the bottom of the form are four buttons: "Clear", "Data Inquiry", "Retrieve a Document", and "Create New Document".

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3. The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.
4. Use the **DOCUMENT REASON** LOV to choose or type the words **Merit Increase** in the **DOCUMENT REASON** field.

The screenshot shows the 'ACT Main Form' window. The 'Document Reason' field is populated with 'MERIT INCREASE'. Other fields include 'Effective Date' (empty), 'Requestor Name' (HALEY), 'Document Number' (empty), 'Document Status' (empty), 'Workflow Type' (empty), and 'Submit Date' (empty). There are checkboxes for 'Attachments' and 'Received'.

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

The screenshot shows the 'ACT Main Form' window. The 'Effective Date' field is now populated with '01-DEC-2010'. All other fields remain the same as in the previous screenshot.

- **All Bi-Weekly paid employees must have Merit Increase documents dated on a Sunday for payroll purposes.**
- **All Monthly paid employees must have Merit Increase documents dated from the beginning of the month.**

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

The screenshot shows the bottom section of the 'ACT Main Form'. It includes a 'Comments' text area, a row of tabs for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. Below these are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows. The 'Save' button is highlighted.

**DOCUMENT NUMBER** now displays and the document is in **OPEN** status.

The screenshot shows the 'ACT Main Form' window after saving. The 'Document Number' field is now populated with '485852'. The 'Document Status' field is populated with 'OPEN'. The 'Workflow Type' field is populated with 'CHANGE'. All other fields remain the same.

7. Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.

The screenshot shows the bottom section of the 'ACT Main Form'. The 'Salary' tab is now selected and highlighted. The 'Save' button is still highlighted.

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8. Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.

9. Select **MERIT INCREASE** from the **LOV** in **REASON** field.
10. Click in the **CHANGE VALUE** field; enter the hourly increase amount for biweekly paid employees or the monthly increase amount for salaried employees.

**Example:** If an hourly paid employee currently earns \$10.00 per hour and will increase to \$11.25 per hour, enter **\$1.25**. If a monthly paid employee currently earns \$4,354.17 per month and will increase to \$4,500.00 per month, enter **\$145.83**.

**Note:** You may also enter a percentage change in the **CHANGE %** field instead of an amount in the **CHANGE VALUE** field.

11. The **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically be entered based upon the new rate of pay.

	Current	Proposed
Projected Assignment Salary	52,250.00	54,000.00
Actual Assignment Rate of Pay	4,354.17	4,500.00

12. If processing a **Merit Increase** document for a **UAB Hospital** employee, click in the **HOSP CALC CODE** field and select **B** from the listing.

FTE	1.00	
Hosp Calc Code	A	A

13. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
14. Click on the **SAVE** button.
15. Click on the **RETURN TO PREVIOUS FORM** button.

If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a **Merit Increase** document, [click here](#). If the employee's Labor Source information must be changed proceed on to step 16.

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16. If the labor sources are changing for an employee, click on the **LABOR SOURCES** button on the **ACT MAIN FORM**.
17. The **LABOR SOURCES** form opens.

Projected Assignment Salary:  Element Name:

**Costing**

Assignment ☒ Element ☐

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-SEP-2005		3100654.000.213100654.114301000					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**

Return to Previous Form Save

### Entering GL Funding Sources

**Note:** If you are entering new GL or GA information for an employee, you must stop the other labor sources by clicking in the **STOP** checkbox located to the left of each funding source before entering new ones.

Projected Assignment Salary:  Element Name:

**Costing**

Assignment ☒ Element ☐

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-SEP-2005		3100654.000.213100654.114301000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments:

Total LD % **.00**

Return to Previous Form Save

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18. If an employee has a GL funding source and this information is changing, click in the **GL CODE** field.

The screenshot shows the 'Costing' window with the 'Element' tab selected. It displays a table with columns for 'Current', 'Stop', 'Effective Date', 'From Date', 'To Date', 'GL Code', 'Project', 'Task', 'Award', 'Exp Or', and '%'. The first row shows '01-AUG-2003' to '01-OCT-2005' with the GL Code '3100474.000.213100474.112102000'. The second row has a dropdown arrow in the GL Code field. At the bottom right, 'Total LD %' is shown as '.00'.

19. Click on the LOV. This opens the **UAB\_AKF FIND WINDOW**.

The screenshot shows the 'UAB\_AKF FIND WINDOW' with a search field labeled 'ALIAS' and a dropdown arrow. Below the field is a horizontal scrollbar. At the bottom are buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

20. Click on the LOV icon in the **ALIAS** field.
21. Enter ***the new funding source account number*** or use the **% WILD CARD** to perform a search. Enter as much information as possible to limit your search.
22. Once the new account number is entered, click on the **OK** button. The **UAB\_AKF** window will open displaying the account string.

The screenshot shows the 'UAB\_AKF' window displaying account details. It includes fields for 'ACCOUNT' (2100669), 'SUBACCOUNT' (000), 'BALANCING' (110100000), 'ORGANIZATION' (112302000), 'FUTURE' (0000), and 'OBJECT' (with a dropdown arrow). To the right of these fields are labels: 'MAINTENANCE-CAMPUS', 'DEFAULT SUBACCOUNT', 'CENTRAL GEN OPER FDS', 'CAMPUS MAINTENANCE', and 'DEFAULT'. At the bottom are buttons for 'OK', 'Cancel', 'Combinations', 'Clear', and 'Help'.

23. Type **"0" zero** in the **OBJECT** field. Click **OK**.
24. The **LABOR SOURCES** form opens displaying the account string information in the **GL CODE** field.

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Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005		2100669.000.110100000.112302000					

25. Type in the **percent of the employee's effort to be charged to this account** in the % field. Only one funding source is allowed for each record/row.

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005		2100669.000.110100000.112302000					

Comments: Total LD % 100.00

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

26. Repeat the above steps, as needed, for entering all GL account funding sources.

### Entering Grant Funding Sources

27. If an employee is funded from a grant and this information is changing, click once in the **PROJECT** field of the next available row.

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005							

Comments: Total LD % 100.00

- Choose the **project number** from the LOV in the **PROJECT** field or **type the grant number in the field**.
- Choose the **task number** from the LOV in the **Task** field or **type the number into the field**.
- Choose the **award number** from the LOV in the **AWARD** field or **type the number into the field**.
- Choose the **organization number** from the LOV in the **EXPENDITURE ORGANIZATION** field or type **the number into the field**. For the hospital, this number is **70**. For the university, the number is **10**.

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-AUG-2003		3100474.000.213100474.112102000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2005	31-MAY-2006		223252	01.01	1523252	10	

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28. Type in ***the percent of the employee's effort to be charged to this account*** in the % field. Only one funding source is allowed for each record/row.

A screenshot of a web-based form interface. At the top, there is a table with several columns and rows. Below the table, there is a purple bar with the label 'Comments:' on the left. On the right side of this bar, there is a field labeled 'Total LD %' with the value '100.00' entered. This field is circled in red.

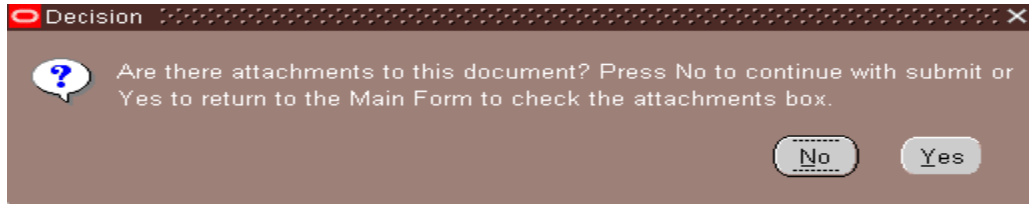
**Note:** *TOTAL LD% must equal 100% before you can save the document.*

29. Repeat the above steps, as needed, for entering all Grant funding sources.
30. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.  
Comments entered here will appear on the **ACT MAIN FORM**.
31. Click on the **SAVE** button.

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32. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
33. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
34. Once the document is submitted the following window appears.



35. Click **No** to continue since **ATTACHMENTS** are not required.
36. 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).*

37. Once the **Merit Increase** 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**.

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