

Appoint, Change and Terminate (ACT) Documentation

Processing a Personal Leave of Absence with pay and without pay

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

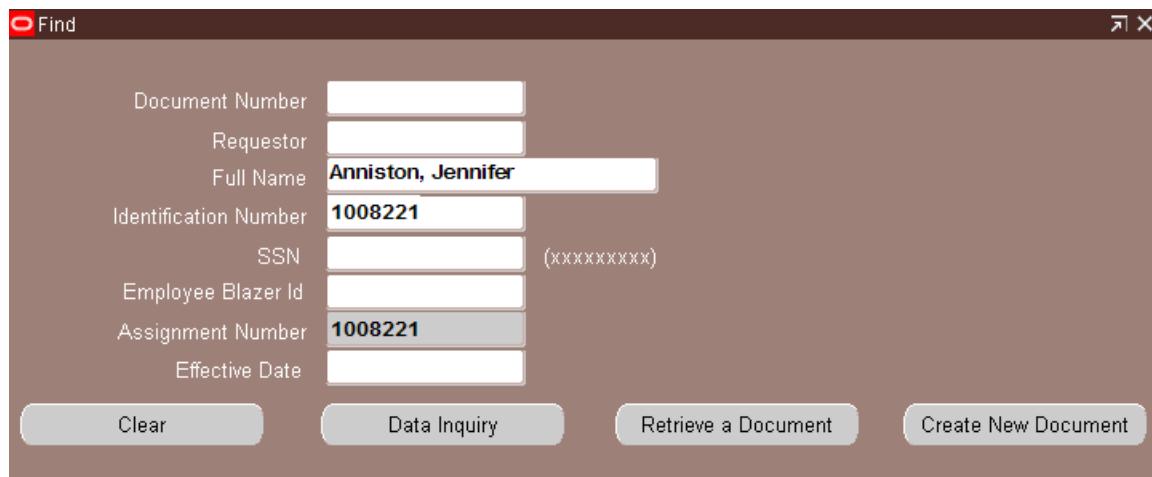
Scenario: *Ms Anniston is on a Personal Leave of Absence effective July 01, 2006 through Sept. 30, 2006. Ms Anniston has enough accrued benefit time to be paid through August 19, 2006. Ms Anniston will return to work on Oct. 1, 2006.*

Accrued personal holidays and vacation time must be paid at the beginning of the personal leave of absence before entering a "non-paid status". When an employee has accrued benefit time available, a ***Personal Leave with Pay ACT document (Step One)*** 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". A ***Personal Leave without Pay ACT document (Step Two)*** must be created for the duration of the personal leave of absence.

UAB HR Officer → HR Transactions → ACT → Find Window

(Step One): Creating a Personal Leave with Pay Document

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



The screenshot shows the 'Find' dialog box with the following data entered:

Document Number	
Requestor	
Full Name	Anniston, Jennifer
Identification Number	1008221
SSN	(xxxxxxxx)
Employee Blazer Id	1008221
Assignment Number	1008221
Effective Date	

At the bottom of the dialog box are four buttons: 'Clear', 'Data Inquiry', 'Retrieve a Document', and '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.

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

ACT Main Form

Document Reason <input type="text" value="PERSONAL LEAVE WITH PAY"/> Effective Date <input type="text" value="01-JUL-2006"/> Requestor Name <input type="text" value="HALEY"/> <input type="checkbox"/> Attachments <input type="checkbox"/> Received	Document Number <input type="text"/> Document Status <input type="text"/> Workflow Type <input type="text"/> Submit Date <input type="text"/>		
Person Data <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> Name <input type="text"/> Identification Number <input type="text"/> SSN <input type="text"/> Service Date <input type="text"/> Date of Birth <input type="text"/> </td> <td style="width: 50%;"> Gender <input type="text"/> Ethnic Origin <input type="text"/> Total Active Assignments <input type="text"/> Total Projected Annual Salary <input type="text"/> <input type="checkbox"/>Prior UAB Service </td> </tr> </table>		Name <input type="text"/> Identification Number <input type="text"/> SSN <input type="text"/> Service Date <input type="text"/> Date of Birth <input type="text"/>	Gender <input type="text"/> Ethnic Origin <input type="text"/> Total Active Assignments <input type="text"/> Total Projected Annual Salary <input type="text"/> <input type="checkbox"/> Prior UAB Service
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Comments <input type="text"/>			
<input type="button" value="Person Data"/> <input type="button" value="Address"/> <input type="button" value="Assignment"/> <input type="button" value="Salary"/> <input type="button" value="Element Entries"/> <input type="button" value="Labor Sources"/>			
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel this document"/> <input type="button" value="Log"/> <input type="button" value="Reassign"/> <input type="button" value="<<"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value=">>"/> <input type="button" value="*"/>			

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

ACT Main Form

Document Reason <input type="text" value="PERSONAL LEAVE WITH PAY"/> Effective Date <input type="text"/> Requestor Name <input type="text" value="HALEY"/> <input type="checkbox"/> Attachments <input type="checkbox"/> Received	Document Number <input type="text"/> Document Status <input type="text"/> Workflow Type <input type="text"/> Submit Date <input type="text"/>
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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 <input type="text" value="PERSONAL LEAVE WITH PAY"/> Effective Date <input type="text" value="01-JUL-2006"/> Requestor Name <input type="text" value="HALEY"/> <input type="checkbox"/> Attachments <input type="checkbox"/> Received	Document Number <input type="text"/> Document Status <input type="text"/> Workflow Type <input type="text"/> Submit Date <input type="text"/>
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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**.

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

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

Full Name	Anniston, Jennifer	Document Reason	PERSONAL LEAVE WITH PAY																																										
Identification Number	1024444	Document Number	205346																																										
Assignment Number	1024444	Document Status	OPEN																																										
		Effective Date	01-JUL-2006																																										
Effective Date From	01-APR-2006	Shift Differential Code	NA																																										
Effective Date To	31-DEC-4712	Grandparented																																											
Primary	Y	Effort Report Eligible	No																																										
General Assignment Information <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;"></th> <th style="width: 25%; text-align: center;">Current</th> <th style="width: 25%; text-align: center;">Proposed</th> </tr> </thead> <tbody> <tr> <td>Assignment Category</td> <td>01 Regular FT</td> <td>Leave With Pay</td> </tr> <tr> <td>Status</td> <td>Active Assignment</td> <td></td> </tr> <tr> <td>Expected Return Date</td> <td></td> <td></td> </tr> <tr> <td>Organization</td> <td>702500000 Cardiovascular Service</td> <td></td> </tr> <tr> <td>Location</td> <td>Bham Main Campus</td> <td></td> </tr> <tr> <td>Position</td> <td>702500000.00214.031001</td> <td></td> </tr> <tr> <td>Job</td> <td>HN134E0.Clin Nurse Spec</td> <td></td> </tr> <tr> <td>Grade</td> <td>W.G17</td> <td></td> </tr> <tr> <td>Payroll Group</td> <td>Staff 12</td> <td></td> </tr> <tr> <td>Timecard Dist Number</td> <td></td> <td></td> </tr> <tr> <td>Timekeeping Method</td> <td></td> <td></td> </tr> <tr> <td>Timekeeping Organization</td> <td></td> <td></td> </tr> <tr> <td>Comments</td> <td colspan="2"> <input style="width: 100%; height: 40px; border: 1px solid #ccc; padding: 5px; margin-top: 5px;" type="text"/> <div style="text-align: right; margin-top: 5px;"> Up Down </div> </td> </tr> </tbody> </table>					Current	Proposed	Assignment Category	01 Regular FT	Leave With Pay	Status	Active Assignment		Expected Return Date			Organization	702500000 Cardiovascular Service		Location	Bham Main Campus		Position	702500000.00214.031001		Job	HN134E0.Clin Nurse Spec		Grade	W.G17		Payroll Group	Staff 12		Timecard Dist Number			Timekeeping Method			Timekeeping Organization			Comments	<input style="width: 100%; height: 40px; border: 1px solid #ccc; padding: 5px; margin-top: 5px;" type="text"/> <div style="text-align: right; margin-top: 5px;"> Up Down </div>	
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8. Click in the **EXPECTED RETURN DATE** field. Enter the expected return date for the employee using the calendar LOV.

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General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		Leave With Pay
Expected Return Date			20-AUG-2006

Note: Entering the Expected Return Date does not automatically return the employee from leave. A RETURN FROM LEAVE DOCUMENT MUST BE PROCESSED BEFORE THE EMPLOYEE WILL BE RETURNED TO AN ACTIVE STATUS.

9. Enter comments, if applicable, in the **COMMENTS** field at the bottom of the **ASSIGNMENT** form. Comments entered here will appear on the **ACT MAIN FORM**.
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 Personal Leave of Absence documents. For a list of attachments required by HRM Records Administration, [click here](#).**

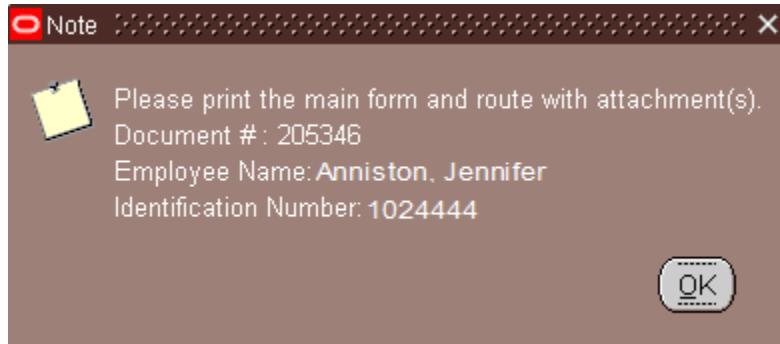
ACT Main Form

Document Reason	PERSONAL LEAVE WITH P/	Document Number	205346																				
Effective Date	01-JUL-2006	Document Status	OPEN																				
Requestor Name	HALEY	Workflow Type	LEAVES																				
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date																					
Person Data <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Name</td> <td style="text-align: center;">Anniston, Jennifer</td> <td>Gender</td> <td style="text-align: center;">Female</td> </tr> <tr> <td>Identification Number</td> <td style="text-align: center;">1024444</td> <td>Ethnic Origin</td> <td style="text-align: center;">White / Non Hispanic</td> </tr> <tr> <td>SSN</td> <td></td> <td>Total Active Assignments</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Service Date</td> <td style="text-align: center;">01-AUG-1990</td> <td>Total Projected Annual Salary</td> <td style="text-align: center;">xx,xxx.xx</td> </tr> <tr> <td>Date of Birth</td> <td style="text-align: center;">21-AUG-1960</td> <td colspan="2"> <input type="checkbox"/> Prior UAB Service </td> </tr> </table>				Name	Anniston, Jennifer	Gender	Female	Identification Number	1024444	Ethnic Origin	White / Non Hispanic	SSN		Total Active Assignments	1	Service Date	01-AUG-1990	Total Projected Annual Salary	xx,xxx.xx	Date of Birth	21-AUG-1960	<input type="checkbox"/> Prior UAB Service	
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SSN		Total Active Assignments	1																				
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13. A **check mark** now appears in the **ASSIGNMENT CHECKBOX**, indicating a change has been entered on the **ASSIGNMENT** form.

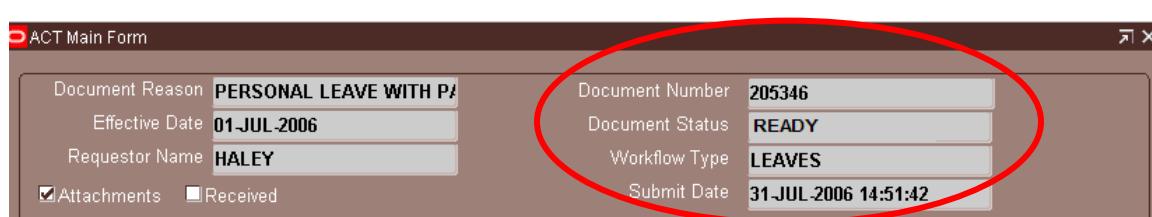
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14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**.



15. Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to HRM Records Administration for approval.

16. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.



Document Reason	PERSONAL LEAVE WITH PAY	Document Number	205346
Effective Date	01-JUL-2006	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	31-JUL-2006 14:51:42

17. Once the **PERSONAL LEAVE WITH PAY** document is approved through the Workflow Approval Path the Document Status changes to **“COMPLETE”**



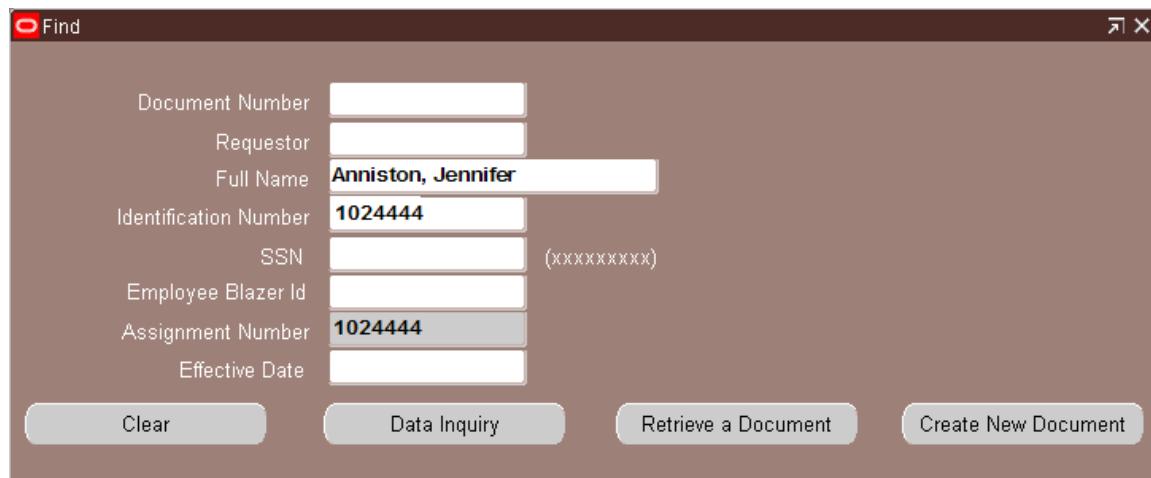
Document Reason	PERSONAL LEAVE WITH PAY	Document Number	205346
Effective Date	01-JUL-2006	Document Status	COMPLETE
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Proceed onto [**Step Two: Creating a Personal Leave without Pay Document.**](#)

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

Step Two: Creating a Personal Leave without Pay Document

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

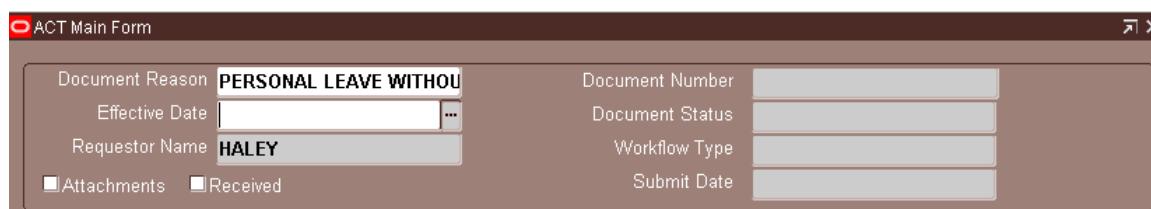


The screenshot shows the 'Find' window with the following data entered:

Document Number	1024444
Requestor	Anniston, Jennifer
Full Name	Anniston, Jennifer
Identification Number	1024444
SSN	(xxxxxxxx)
Employee Blazer Id	
Assignment Number	1024444
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.
4. Use the **DOCUMENT REASON LOV** to choose **PERSONAL LEAVE WITHOUT PAY** or type the words **Personal Leave without Pay** in the **DOCUMENT REASON** field.

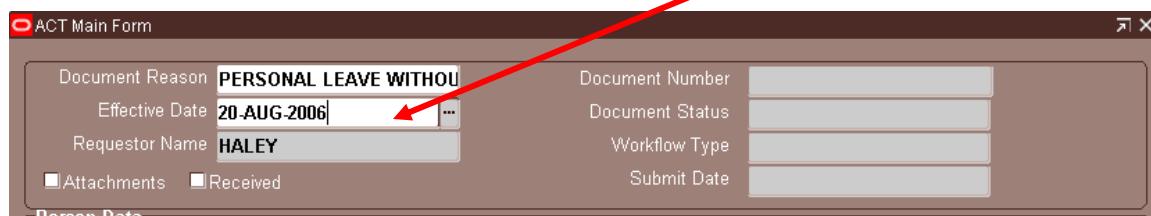


The screenshot shows the 'ACT Main Form' with the 'Document Reason' field set to 'PERSONAL LEAVE WITHOUT PAY'.

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



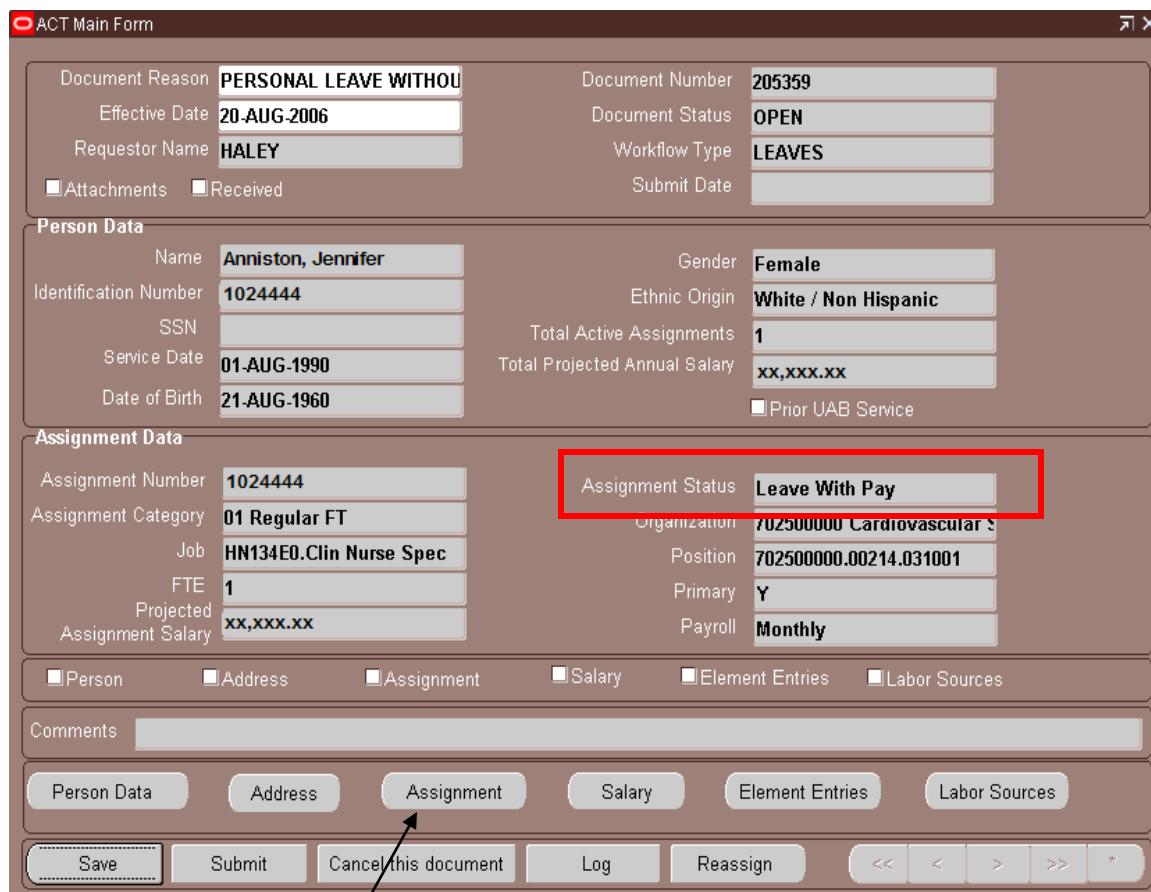
General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		Leave With Pay
Expected Return Date	20-AUG-2006		20-AUG-2006



The screenshot shows the 'ACT Main Form' with a red arrow pointing to the 'Effective Date' field, which contains the value '20-AUG-2006'.

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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**.



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

Document Reason	PERSONAL LEAVE WITHOUT PAY	Document Number	205359																																				
Effective Date	20-AUG-2006	Document Status	OPEN																																				
Requestor Name	HALEY	Workflow Type	LEAVES																																				
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date																																					
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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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Assignment (Create New Document)

Full Name	Anniston, Jennifer	Document Reason	PERSONAL LEAVE WITHOUT PAY			
Identification Number	1024444	Document Number	205359	Notice: EFFECTIVE DATE of Document and CURRENT EXPECTED RETURN DATE are the same date.		
Assignment Number	1024444	Document Status	OPEN			
		Effective Date	20-AUG-2006			
Effective Date From	01-JUL-2006	Shift Differential Code	NA	Effective Date To 31-DEC-4712 Primary Y Grandparented Effort Report Eligible No		
Effective Date To	31-DEC-4712	Grandparented				
Primary	Y	Effort Report Eligible	No			
General Assignment Information <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> Assignment Category 01 Regular FT Status Leave With Pay Expected Return Date 20-AUG-2006 ← Organization 702500000 Cardiovascular Service Location Bham Main Campus Position 702500000.00214.031001 Job HN134E0.Clin Nurse Spec Grade W.G17 Payroll Group Staff 12 Timecard Dist Number Timekeeping Method Timekeeping Organization Comments </td> <td style="width: 50%; vertical-align: top; text-align: center;"> Current Proposed Leave Without Pay (This row is highlighted in yellow) (This row is highlighted in yellow) </td> </tr> </table>					Assignment Category 01 Regular FT Status Leave With Pay Expected Return Date 20-AUG-2006 ← Organization 702500000 Cardiovascular Service Location Bham Main Campus Position 702500000.00214.031001 Job HN134E0.Clin Nurse Spec Grade W.G17 Payroll Group Staff 12 Timecard Dist Number Timekeeping Method Timekeeping Organization Comments	Current Proposed Leave Without Pay (This row is highlighted in yellow) (This row is highlighted in yellow)
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<input type="button" value="Salary"/> <input type="button" value="Labor Sources"/> <input type="button" value="Element Entries"/> <input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/>						

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.

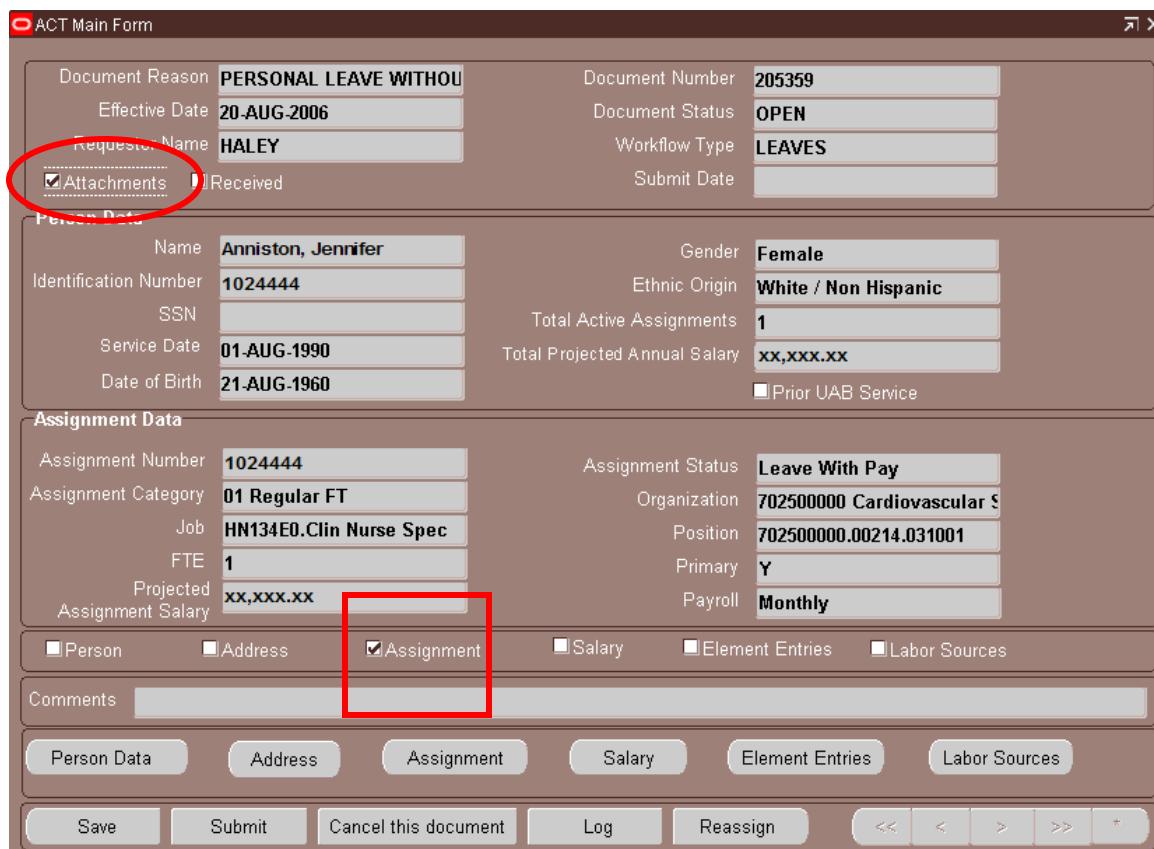
General Assignment Information <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> Assignment Category 01 Regular FT Status Leave With Pay Expected Return Date 20-AUG-2006 Organization 702500000 Cardiovascular Service </td> <td style="width: 50%; vertical-align: top; text-align: center;"> Current Proposed Leave Without Pay (This row is highlighted in yellow) (This row is highlighted in yellow) </td> </tr> </table>		Assignment Category 01 Regular FT Status Leave With Pay Expected Return Date 20-AUG-2006 Organization 702500000 Cardiovascular Service	Current Proposed Leave Without Pay (This row is highlighted in yellow) (This row is highlighted in yellow)
Assignment Category 01 Regular FT Status Leave With Pay Expected Return Date 20-AUG-2006 Organization 702500000 Cardiovascular Service	Current Proposed Leave Without Pay (This row is highlighted in yellow) (This row is highlighted in yellow)		

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.

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

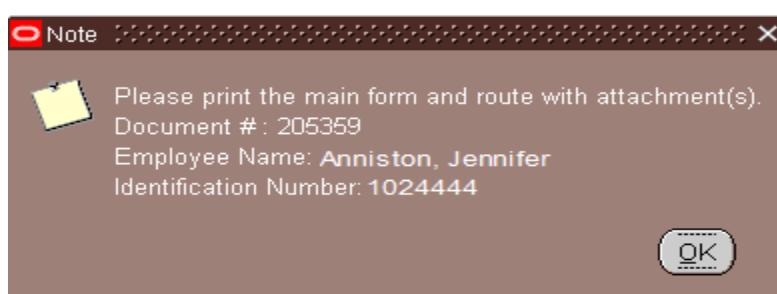
10. Click on the **SAVE** button.
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
12. Click in the **ATTACHMENT** box; a **Check mark** will appear. **Attachments are required for all Medical Leave of Absence documents. For a list of attachments required by HRM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



ACT Main Form

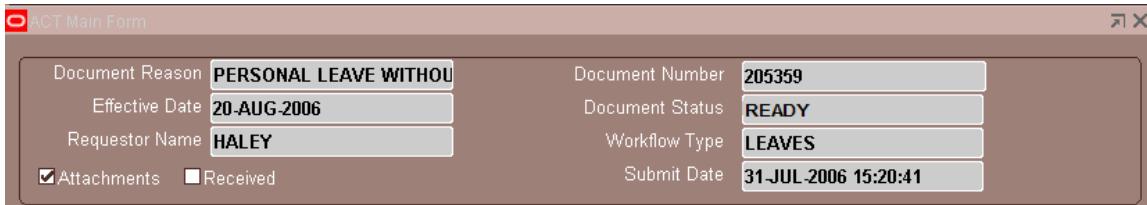
Document Reason	PERSONAL LEAVE WITHOUT PAY	Document Number	205359						
Effective Date	20-AUG-2006	Document Status	OPEN						
Requester Name	HALEY	Workflow Type	LEAVES						
<input checked="" type="checkbox"/> Attachments		<input type="checkbox"/> Received							
Person Data									
Name	Anniston, Jennifer	Gender	Female						
Identification Number	1024444	Ethnic Origin	White / Non Hispanic						
SSN		Total Active Assignments	1						
Service Date	01-AUG-1990	Total Projected Annual Salary	xx,xxx.xx						
Date of Birth	21-AUG-1960	<input type="checkbox"/> Prior UAB Service							
Assignment Data									
Assignment Number	1024444	Assignment Status	Leave With Pay						
Assignment Category	01 Regular FT	Organization	702500000 Cardiovascular S						
Job	HN134E0.Clin Nurse Spec	Position	702500000.00214.031001						
FTE	1	Primary	Y						
Projected Assignment Salary	xx,xxx.xx	Payroll	Monthly						
<input type="checkbox"/> Person <input type="checkbox"/> Address <input checked="" type="checkbox"/> Assignment <input type="checkbox"/> Salary <input type="checkbox"/> Element Entries <input type="checkbox"/> Labor Sources									
Comments									
Person Data		Address	Assignment						
Salary		Element Entries	Labor Sources						
Save	Submit	Cancel this document	Log	Reassign	<<	<	>	>>	+

13. A **check mark** now appears in the **ASSIGNMENT CHECKBOX**, indicating a change has been entered on the **ASSIGNMENT** form.
14. Click on the **SUBMIT** button at the bottom of the **ACT MAIN FORM**. The following **NOTE** appears. Click **OK**.



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

15. Print the **ACT MAIN FORM**; attach to the front of attachments to be forwarded to HRM Records Administration for approval.
16. The **DOCUMENT STATUS** field changes to **READY**; the document enters workflow for approval.



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

Document Reason	PERSONAL LEAVE WITHOU	Document Number	205359
Effective Date	20-AUG-2006	Document Status	READY
Requestor Name	HALEY	Workflow Type	LEAVES
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	31-JUL-2006 15:20:41

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