

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.

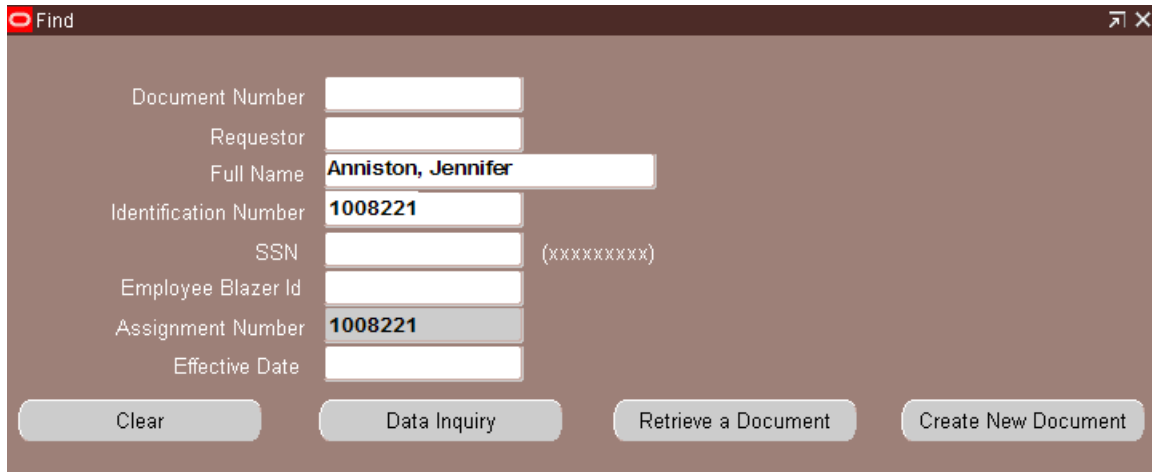
Scenario: *Ms Anniston is on a Personal Leave of Absence effective July 01, 2006 through Sept. 30, 2006. Ms Anniston has enough accrued benefit time to be paid through August 19, 2006. Ms Anniston will return to work on Oct. 1, 2006.*

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 to 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.



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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ACT Main Form

Document Reason: ... Document Number:

Effective Date: Document Status:

Requestor Name: **HALEY** Workflow Type:

☐ Attachments ☐ Received Submit Date:

Person Data

Name: Gender:

Identification Number: Ethnic Origin:

SSN: Total Active Assignments:

Service Date: Total Projected Annual Salary:

Date of Birth: ☐ Prior UAB Service

Assignment Data

Assignment Number: Assignment Status:

Assignment Category: Organization:

Job: Position:

FTE: Primary:

Projected Assignment Salary: Payroll:

☐ Person ☐ Address ☐ Assignment ☐ Salary ☐ Element Entries ☐ Labor Sources

Comments:

Person Data Address Assignment Salary Element Entries Labor Sources

Save Submit Cancel this document Log Reassign << < > >> +

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: **PERSONAL LEAVE WITH PAY** Document Number:

Effective Date: ... Document Status:

Requestor Name: **HALEY** Workflow Type:

☐ Attachments ☐ Received Submit Date:

5. Click 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.

ACT Main Form

Document Reason: **PERSONAL LEAVE WITH PAY** Document Number:

Effective Date: **01-JUL-2006** ... Document Status:

Requestor Name: **HALEY** Workflow Type:

☐ Attachments ☐ 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**.

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ACT Main Form

Document Reason: **PERSONAL LEAVE WITH P/**
 Effective Date: **01-JUL-2006**
 Requestor Name: **HALEY**
☐ Attachments ☐ Received

Document Number: **205346**
 Document Status: **OPEN**
 Workflow Type: **LEAVES**
 Submit Date:

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** ☐ Prior UAB Service

Assignment Data
 Assignment Number: **1024444** Assignment Status: **Active Assignment**
 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**

☐ Person ☐ Address ☐ Assignment ☐ Salary ☐ Element Entries ☐ Labor Sources

Comments:

Person Data Address Assignment Salary Element Entries Labor Sources

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

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

Assignment (Retrieve a Document)

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

Current	Proposed
Assignment Category: 01 Regular FT	Assignment Category: Leave With Pay
Status: Active Assignment	Status: Leave With Pay
Expected Return Date: <input type="text"/>	Expected Return Date: <input type="text"/>
Organization: 702500000 Cardiovascular Service	Organization: <input type="text"/>
Location: Bham Main Campus	Location: <input type="text"/>
Position: 702500000.00214.031001	Position: <input type="text"/>
Job: HN134E0.Clin Nurse Spec	Job: <input type="text"/>
Grade: W.G17	Grade: <input type="text"/>
Payroll Group: Staff 12	Payroll Group: <input type="text"/>
Timecard Dist Number: <input type="text"/>	Timecard Dist Number: <input type="text"/>
Timekeeping Method: <input type="text"/>	Timekeeping Method: <input type="text"/>
Timekeeping Organization: <input type="text"/>	Timekeeping Organization: <input type="text"/>
Comments: <input type="text"/>	Comments: <input type="text"/>

Salary Labor Sources Element Entries Return to Previous Form Save

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 PA		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

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: Active Assignment
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

☐ Person ☐ Address ☒ Assignment ☐ Salary ☐ Element Entries ☐ Labor Sources

Comments:

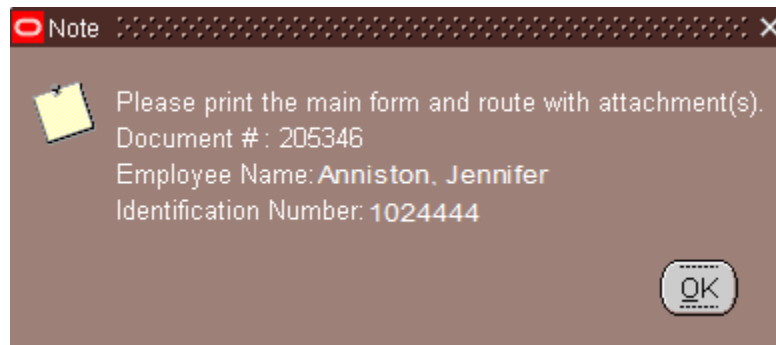
Person Data
Address
Assignment
Salary
Element Entries
Labor Sources

Save
Submit
Cancel this document
Log
Reassign
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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.

A screenshot of the 'ACT Main Form' window. The 'Document Reason' is 'PERSONAL LEAVE WITH PAY', 'Effective Date' is '01-JUL-2006', and 'Requestor Name' is 'HALEY'. The 'Document Number' is '205346', 'Document Status' is 'READY', 'Workflow Type' is 'LEAVES', and 'Submit Date' is '31-JUL-2006 14:51:42'. The 'Attachments' checkbox is checked. A red oval highlights the 'Document Number', 'Document Status', 'Workflow Type', and 'Submit Date' fields.

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

A screenshot of the 'ACT Main Form' window, similar to the previous one, but the 'Document Status' is now 'COMPLETE'. The 'Effective Date' '01-JUL-2006' is highlighted with a blue selection bar.

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 fields and values:

Field	Value
Document Number	
Requestor	
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 following fields and values:

Field	Value
Document Reason	PERSONAL LEAVE WITHOU
Effective Date	
Requestor Name	HALEY
Document Number	
Document Status	
Workflow Type	
Submit Date	

Buttons: Attachments, Received.

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.

The screenshot shows the 'General Assignment Information' section with the following fields and values:

Field	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 the following fields and values:

Field	Value
Document Reason	PERSONAL LEAVE WITHOU
Effective Date	20-AUG-2006
Requestor Name	HALEY
Document Number	
Document Status	
Workflow Type	
Submit Date	

Buttons: Attachments, Received.

A red arrow points from the 'Expected Return Date' field in the 'General Assignment Information' section to the 'Effective Date' field in the 'ACT Main Form'.

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- 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 displays the 'ACT Main Form' interface. It is divided into several sections: 'Document Reason' (PERSONAL LEAVE WITHOU), 'Effective Date' (20-AUG-2006), 'Requestor Name' (HALEY), 'Document Number' (205359), 'Document Status' (OPEN), 'Workflow Type' (LEAVES), and 'Submit Date'. Below these are checkboxes for 'Attachments' and 'Received'. The 'Person Data' section includes fields for Name (Anniston, Jennifer), Gender (Female), Identification Number (1024444), Ethnic Origin (White / Non Hispanic), SSN, Service Date (01-AUG-1990), Total Active Assignments (1), Date of Birth (21-AUG-1960), Total Projected Annual Salary (xx,xxx.xx), and a checkbox for 'Prior UAB Service'. The 'Assignment Data' section shows Assignment Number (1024444), Assignment Status (Leave With Pay, highlighted with a red box), Assignment Category (01 Regular FT), Job (HN134E0.Clin Nurse Spec), Organization (702500000 Cardiovascular S), Position (702500000.00214.031001), FTE (1), Primary (Y), Projected Assignment Salary (xx,xxx.xx), and Payroll (Monthly). At the bottom, there are checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources', a 'Comments' field, and a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. The bottom-most row contains 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows. An arrow points from the 'Assignment' button to the 'Assignment Status' field.

Note: ASSIGNMENT STATUS field currently displays the employee in a "Leave with Pay" status.

- 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
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 Grandparented:
 Primary: Y Effort Report Eligible: No

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

General Assignment Information	
Current	Proposed
Assignment Category: 01 Regular FT	
Status: Leave With Pay	Leave Without 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:	

Salary Labor Sources Element Entries Return to Previous Form 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.

- 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	Leave Without Pay
Expected Return Date: 20-AUG-2006	01-OCT-2006
Organization: 702500000 Cardiovascular Service	

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.

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

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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](#).**

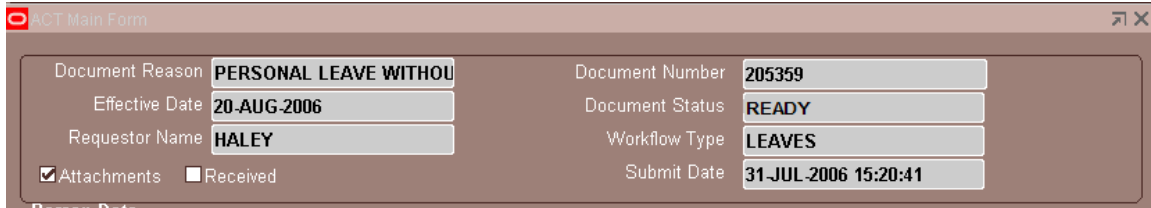
The screenshot shows the 'ACT Main Form' window. The 'Document Reason' is 'PERSONAL LEAVE WITHOUT PAY'. The 'Effective Date' is '20-AUG-2006'. The 'Requester Name' is 'HALEY'. The 'Document Number' is '205359'. The 'Document Status' is 'OPEN'. The 'Workflow Type' is 'LEAVES'. The 'Submit Date' is empty. The 'Attachments' checkbox is checked and circled in red. The 'Person Data' section includes: 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', and a 'Prior UAB Service' checkbox. The 'Assignment Data' section includes: 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', and Payroll 'Monthly'. Below the assignment data, there are checkboxes for 'Person', 'Address', 'Assignment' (checked and highlighted with a red box), 'Salary', 'Element Entries', and 'Labor Sources'. At the bottom, there are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources', and a row of buttons: 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

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**.

The screenshot shows a 'Note' dialog box with a yellow notepad icon. The text inside reads: 'Please print the main form and route with attachment(s). Document #: 205359 Employee Name: Anniston, Jennifer Identification Number: 1024444'. There is an 'OK' button at the bottom right.

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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 a web application window titled "ACT Main Form". It contains two columns of form fields. The left column includes "Document Reason" (PERSONAL LEAVE WITHOU), "Effective Date" (20-AUG-2006), "Requestor Name" (HALEY), and checkboxes for "Attachments" (checked) and "Received" (unchecked). The right column includes "Document Number" (205359), "Document Status" (READY), "Workflow Type" (LEAVES), and "Submit Date" (31-JUL-2006 15:20:41). A "Document Date" label is partially visible at the bottom left.

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
Document Date			

[RETURN TO TOP](#)