

## Appoint, Change and Terminate (ACT) Documentation Probationary Increase

The **PROBATIONARY INCREASE** document reason is used to process a salary increase for an employee after completion of the initial six (6) months (probationary period) of employment with the University. A probationary increase is given ***at the discretion of the employee's department according to departmental policies.***

A **PROBATIONARY INCREASE** document usually requires changing the ***salary information*** only. However, the **LABOR SOURCES** form is available for change or update.

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

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UAB HR Officer → HR Transactions → ACT → Find Window

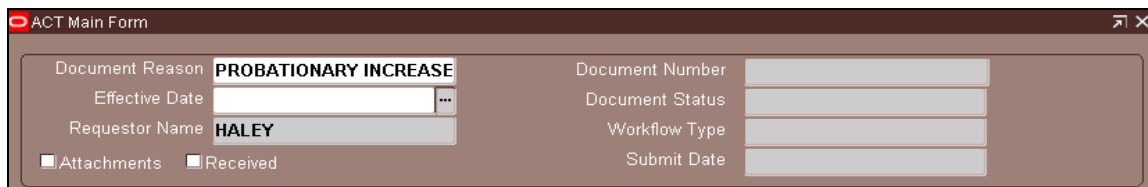
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1. Use the **FIND WINDOW** to locate the employee.
2. Click on the **CREATE NEW DOCUMENT** button.

***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.***

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 ***Probationary Increase*** in the **DOCUMENT REASON** field.

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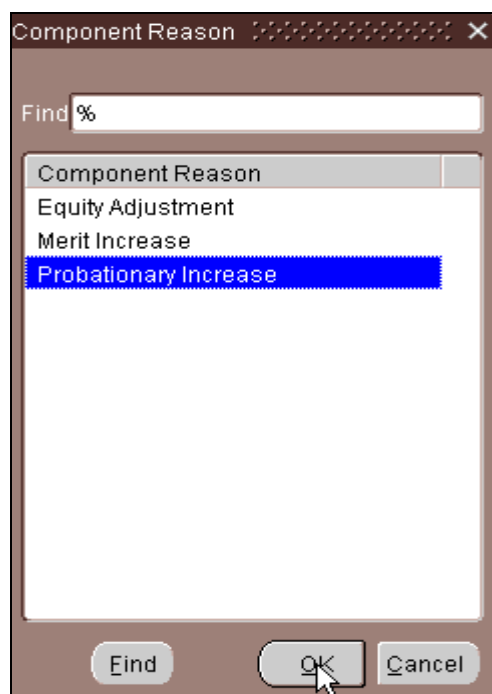
5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date. Remember to use the **DD-MMM-YYYY** format.

**Note:** *The Document Effective Date for all bi-weekly paid employees receiving a Probationary Increase must be the beginning of a pay period. The Document Effective Date for all monthly paid employees must be the beginning of the month.*

6. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**.
7. Click on the **SALARY** button located on the **ACT MAIN FORM**; the **SALARY** form opens.
8. Click in the **REASON** field located in the **COMPONENT REASONS** section of the **SALARY** form.



9. Select **PROBATIONARY INCREASE** from the LOV or type the information in the **REASON** field. Click **OK**.



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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 \$3,300.00 per month and will increase to \$3,600.00 per month, enter **\$300.00**.

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

Component Reasons	Reason	Change Value	Change %	
	Probationary Increase	150.00	3.05	Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

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

	Current	Proposed
Assignment Salary	59,000.04	60,800.04
Assignment Rate Pay	4,916.67	5,066.67

12. If processing a **Probationary Increase** document for a **UAB Hospital** employee, click in the **HOSP CALC CODE** field and select **B** from the listing.
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.
16. If the employee's current Labor Source information is correct, proceed with submitting the document. For instructions on submitting a **Probationary Increase** document, [click here](#). If the employee's Labor Source information must be changed proceed onto **Changing Labor Source Information**.

## Appoint, Change and Terminate (ACT) Documentation Probationary Increase

### Changing Labor Source Information

1. If the labor sources are changing for an employee, click on the **LABOR SOURCES** button on the **ACT MAIN FORM**.

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (PROBATIONARY INCREASE), Effective Date (27-SEP-2009), Requestor Name (HALEY), Document Number (422934), Document Status (OPEN), Workflow Type (CHANGE), Submit Date.
- Person Data:** Name (Example, One B), Identification Number (1050664), SSN, Service Date (02-MAR-2009), Date of Birth (26-APR-1966), Gender (Female), Ethnic Origin (White), Total Active Assignments (1), Total Projected Annual Salary (xx,xxx.xx), Prior UAB Service checkbox.
- Assignment Data:** Assignment Number (1050664), Assignment Category (12 Three 12-Hour Shifts), Job (HN010N0.Registered Nurse), FTE (.9), Projected Assignment Salary (xx,xxx.xx), Assignment Status (Active Assignment), Organization (706250000 Nursing Services), Position (706250000.71901.080610), Primary (Y), Payroll (Biweekly).
- Navigation Buttons:** Person, Address, Assignment, Salary, Element Entries, Labor Sources (highlighted with a red arrow), Doc Subgroup.
- Comments:** A text area for notes.
- Form Controls:** Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Document Subgroup buttons.
- Action Buttons:** Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

The **LABOR SOURCES** form opens.

The screenshot shows the 'Costing' form. It features a table for entering cost data:

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input type="checkbox"/>	19-DEC-2005	3101067.000.213101067.311401000					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"/>							

At the bottom right, it shows 'Total LD % 100.00'. There is also a 'Comments:' field at the bottom left.

## Appoint, Change and Terminate (ACT) Documentation

### Probationary Increase

#### 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.

The screenshot shows the 'Costing' window with the 'Element' tab selected. The 'Assignment Salary' is 60,870.04. The 'Current' tab is active, showing a table of funding sources. The first row is selected, with 'LD' and 'Stop' checkboxes checked. The 'Effective Date' is 19-DEC-2005, and the 'GL Code' is 3101067.000.213101067.311401000. The 'Total LD %' is .00.

Current	LD	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	19-DEC-2005			3101067.000.213101067.311401000					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"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									

2. 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. The 'Current' tab is active, showing a table of funding sources. The first row is selected, with 'LD' and 'Stop' checkboxes checked. The 'Effective Date' is 19-DEC-2005, and the 'GL Code' is 3101067.000.213101067.311401000. The 'Total LD %' is .00.

Current	LD	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	19-DEC-2005			3101067.000.213101067.311401000					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"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									

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

The screenshot shows the 'UAB\_AKF FIND WINDOW' with a search bar labeled 'ALIAS' and a dropdown arrow. The window has buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

4. Enter **the new funding source account number** or use LOV to locate the correct account number.

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**Note:** When using the ALIAS LOV, use the % WILD CARD to perform a search. Enter as much information as possible to limit your search.

- 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 with the following fields and values:

ACCOUNT	3101123	GRADUATE MED EDUCATI
SUBACCOUNT	000	DEFAULT SUBACCOUNT
BALANCING	213101123	GRADUATE MED EDUCATI
ORGANIZATION	310000000	SCHOOL OF MEDICINE DEAN'S OFFICE
FUTURE	0000	DEFAULT
OBJECT		

Buttons at the bottom: OK, Cancel, Combinations, Clear, Help.

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

The screenshot shows the Labor Sources form with the following information:

Assignment Salary: 60,800.04  
Element Name: [Dropdown]  
Costing

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005		3101067.000.213101067.311401000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006		3101123.000.213101123.310000000					
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: [Text Area]  
Total LD %: .00

- 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.

The screenshot shows the Labor Sources form with the following information:

Assignment Salary: 60,800.04  
Element Name: [Dropdown]  
Costing

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-DEC-2005		3101067.000.213101067.311401000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006		3101123.000.213101123.310000000					
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: [Text Area]  
Total LD %: 100.00

**Note:** The Total LD % must total 100% before you can submit the document.

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

## Appoint, Change and Terminate (ACT) Documentation Probationary Increase

### Entering Grant Funding Sources

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

The screenshot shows the 'Costing' section of the ACT form. It includes a table with columns for 'Current', 'Stop', 'Effective Date' (From Date, To Date), 'GL Code', 'Project', 'Task', 'Award', 'Exp Or', and '%'. The first row is filled with data: '01-AUG-2003' to '01-OCT-2005', GL Code '3100474.000.213100474.112102000', and a percentage of '100.00'. A red arrow points to the 'Project' field in the second row, which is currently empty. The 'Total LD %' at the bottom right is '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**.

This screenshot shows the same 'Costing' section as the previous one, but with more data entered in the second row. The 'Project' field now contains '223252', 'Task' is '01.01', 'Award' is '1523252', 'Exp Or' is '10', and the '%' field is '100.00'. A red arrow points to the '%' field. The 'Total LD %' at the bottom right remains '100.00'.

20. 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.

This screenshot shows the 'Costing' section with the second row's data: '223252', '01.01', '1523252', '10', and '100.00'. A red arrow points to the '%' field. The 'Total LD %' at the bottom right is '100.00'.

**Note:** The Total LD % must total 100% before you can submit the document.

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

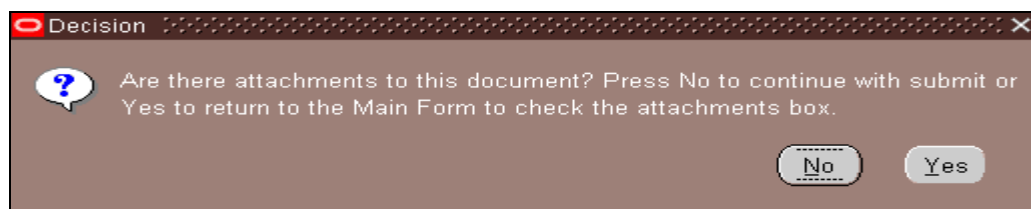
## Appoint, Change and Terminate (ACT) Documentation Probationary Increase

23. Click on the **SAVE** button.

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

### Submitting the Document

1. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



3. Click **No** to continue since **ATTACHMENTS** are not required.
4. 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).*

5. Once the **Probationary 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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