Appoint, Change and Terminate (ACT Documentation)
Promotion Same Department

The **PROMOTION SAME DEPARTMENT** Document Reason is used when an employee changes to a job classification that is a ***higher pay grade*** than their current job classification ***within the same department***. The ***position number***, ***job title*** and ***job grade must*** change using this document reason. If the position number is not changing, use the **RECLASSIFICATION** document reason. For instructions on creating a **RECLASSIFICATION** document, ***click here.***

Used when a Faculty member is promoted in faculty rank in the same organization or when Staff is promoted to Full-time Faculty.

The **ASSIGNMENT, SALARY,** and **LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields.

UAB HR Officer → HR Transactions → ACT → Find Window

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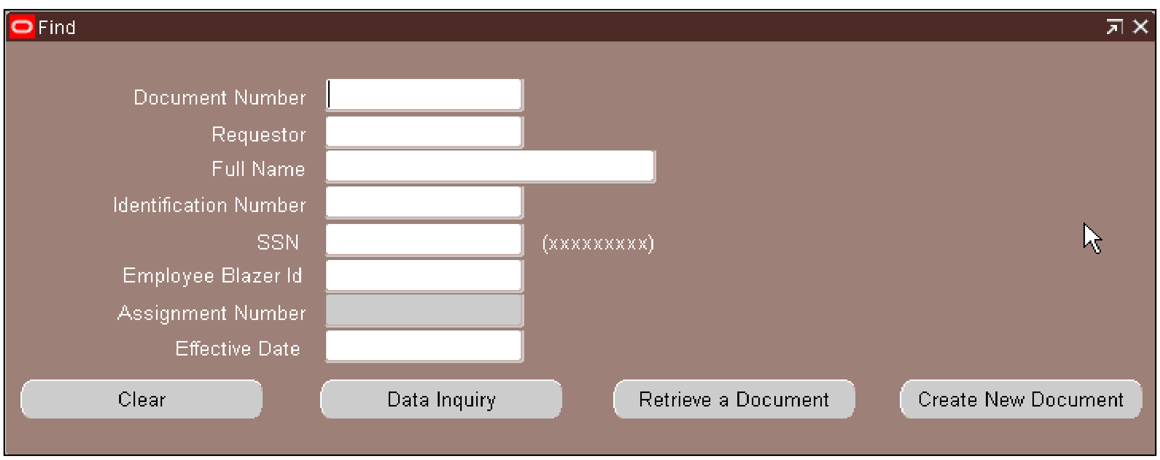
1. Use the **FIND WINDOW** to locate the employee.



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.

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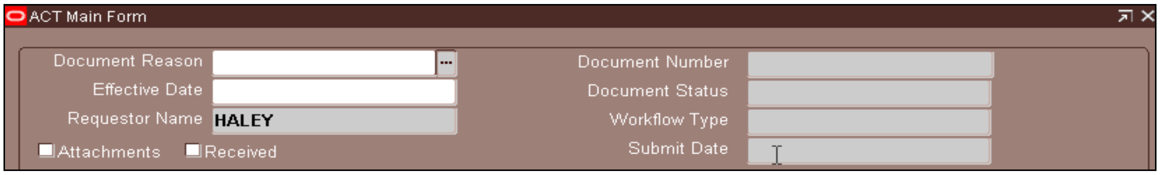
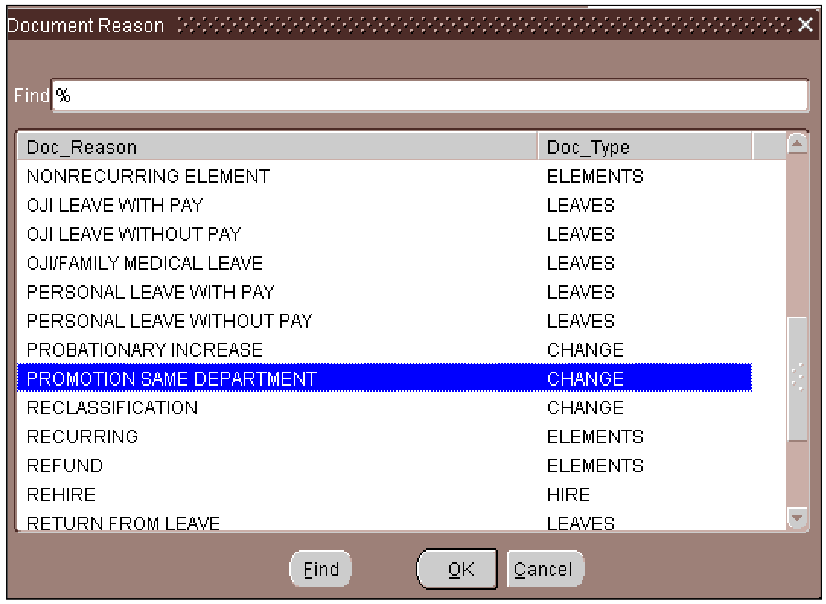


4. Use the **DOCUMENT REASON** LOV to choose or type the words ***Promotion Same Department*** in the **DOCUMENT REASON** field.

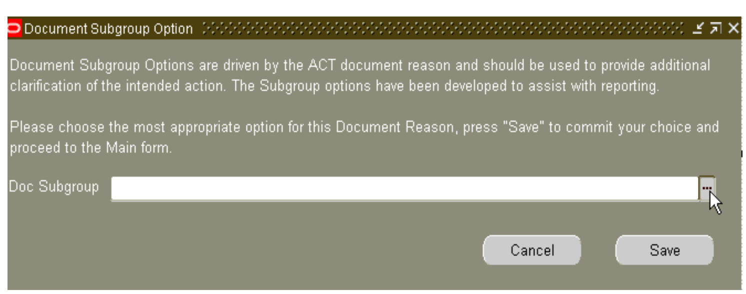


5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date.

   Note: ***The Document Effective Date for all bi-weekly paid employees receiving a promotion same department must be a Sunday. If the Labor Source(s) are changing, the Document Effective Date must be a future date that is beyond the current pay period for biweekly paid employees. Verify payroll schedules before submitting the document. To view biweekly and monthly payroll schedules go to Financial Affairs webpage.***
   Copy and paste link into URL:
   http://uabcalendar.infomedia.com/ActiveDataCalendar

6. Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.

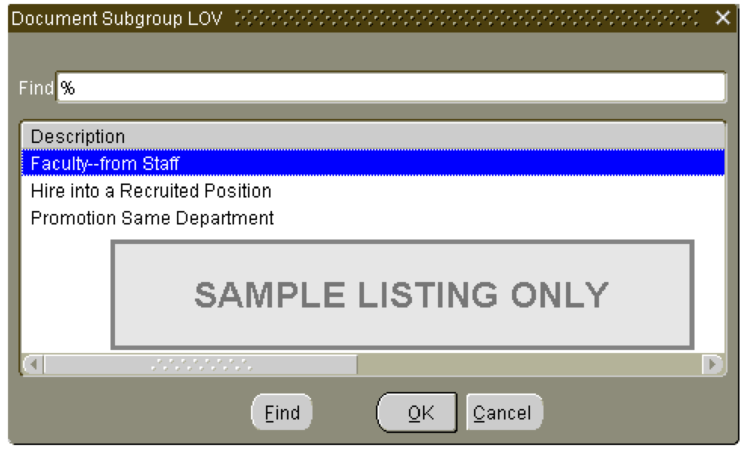
7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **DOC SUBGROUP** field **LOV**.



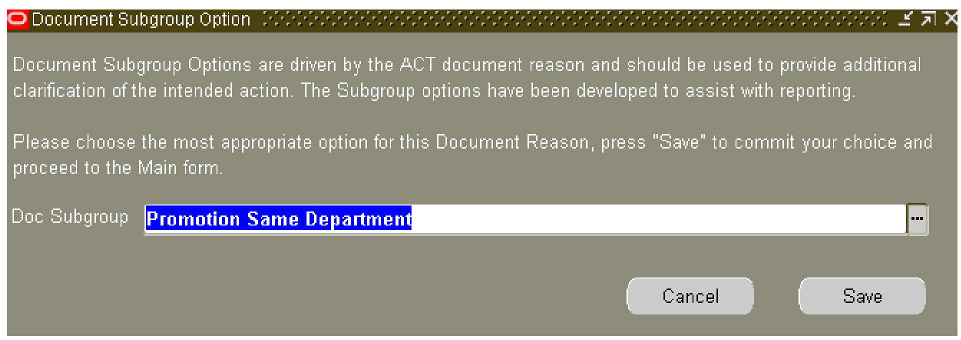
8. Select the description that best explains the nature of the transaction.

   For a complete list of available **DOCUMENT SUBGROUP DESCRIPTIONS** and explanation of when to use, click ***here***.

9. Click on **OK** to select.



10. Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.



Warning: If you change the **DOC SUBGROUP** field after the initial save in step 10, ***you must re-save in order to commit your change***.

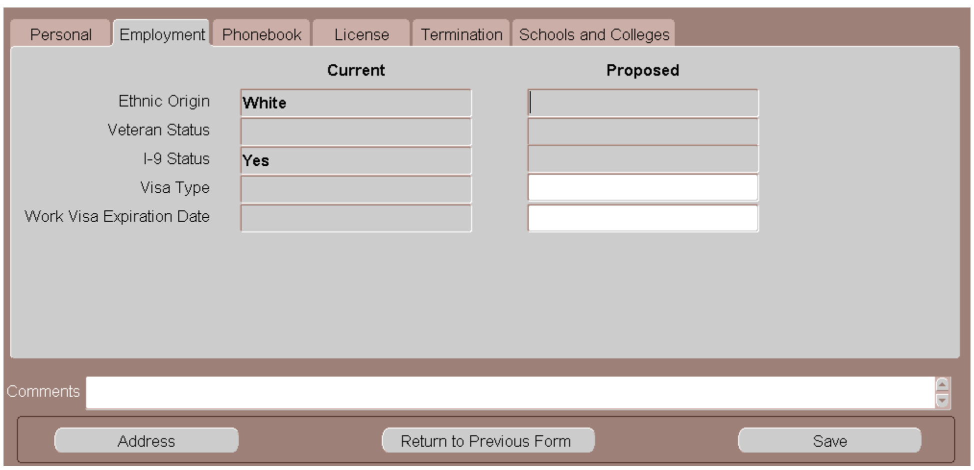
11. Click on the **SAVE** button at the bottom of the **ACT MAIN FORM.**

12. If the employee's personal information ***will not*** be changing, ***click here.***

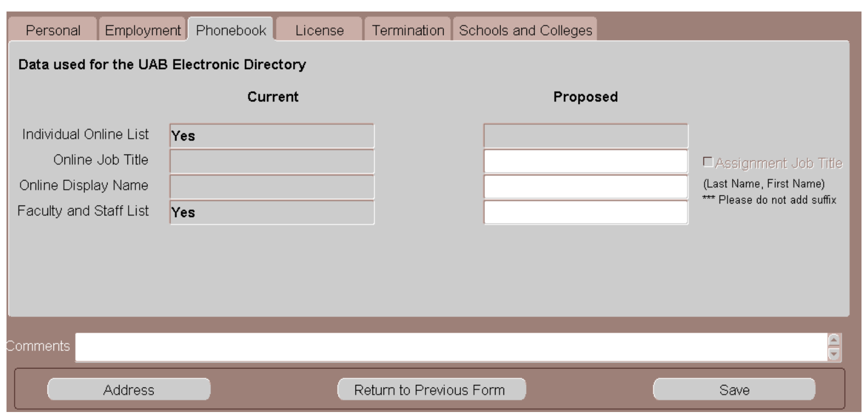
Changing Personal Data

1. If ***personal information*** pertaining to the employee is changing, click on the **PERSON DATA** button. Most tabs and fields (except for the **PERSONAL** tab) will be available for change or update when using a *current* or *future* document effective date. Limited tabs and fields will available when using a *retroactive* document effective date.

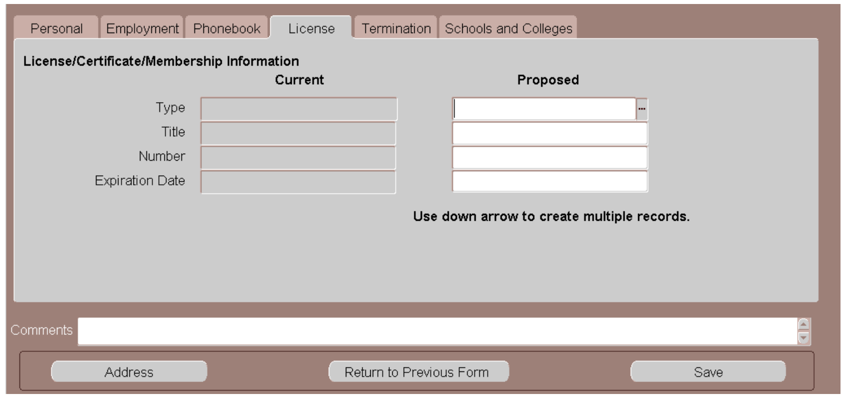
   a. If **VISA** information needs to be changed, click on the **EMPLOYMENT** tab. Select the correct Visa type from the **VISA TYPE** LOV; enter the correct **WORK VISA EXPIRATION DATE**. Click on the **SAVE** button at the bottom of the form.



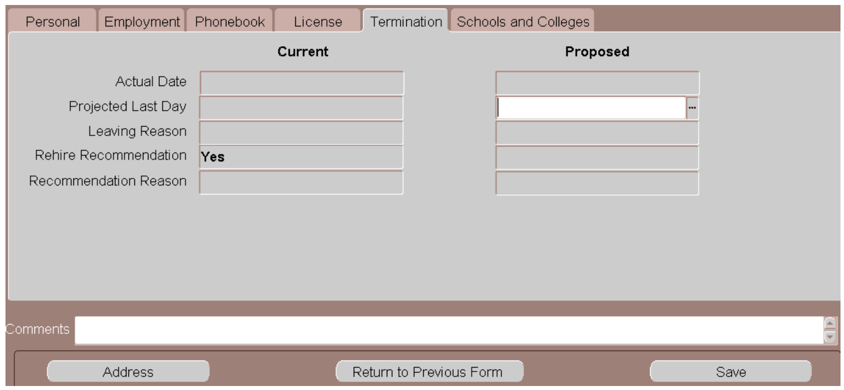
   b. If **PHONEBOOK** information needs to be added or changed, click on the **PHONEBOOK** tab. Click on the **SAVE** button after entering the information.



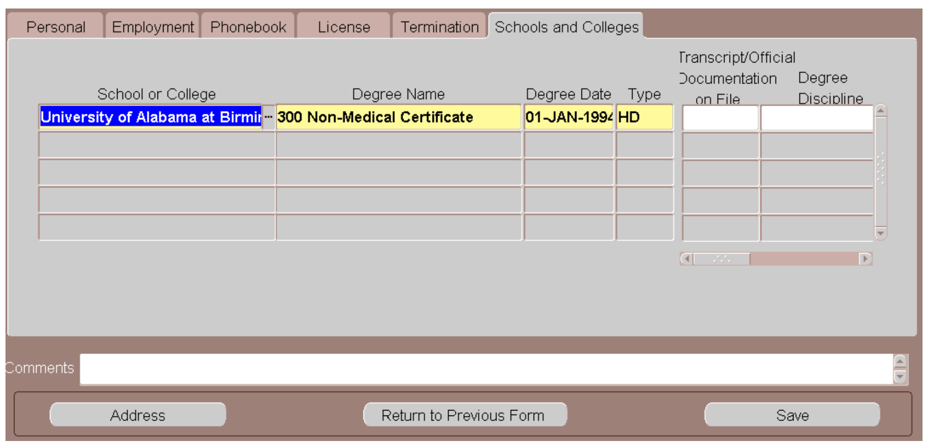
c. If **LICENSE** information needs to be added or changed, click on the **LICENSE** tab; choose the appropriate entry from the **TYPE** field LOV. Click on the **SAVE** button after entering the information



d. If the assignment has a known termination or end date, click on the **TERMINATION** tab; enter the termination or end date in the **PROJECTED LAST DAY OF WORK** field. Click on the **SAVE** button after entering the information.



2. Click on the **SCHOOLS AND COLLEGES** tab.



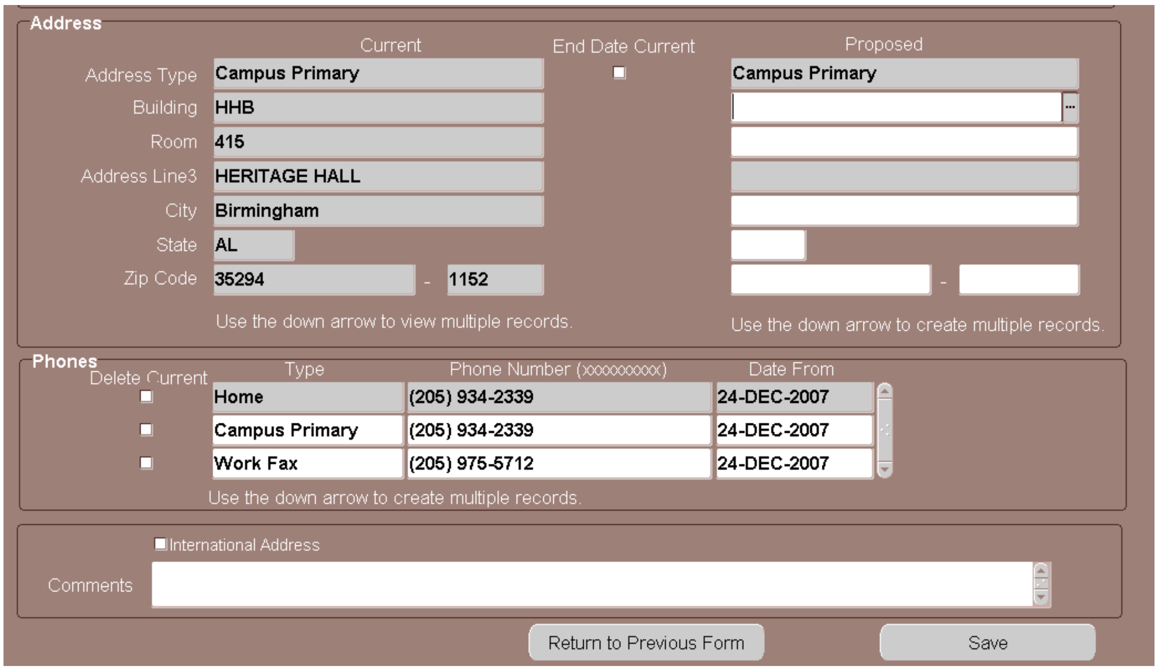
a. If Schools and Colleges information displays and is ***accurate***, click on the **SAVE** button located at the bottom of the form.

b. If Schools and Colleges information is ***not accurate***, you may:
   - Overwrite the existing information.
   - Enter additional School or College's, Degree Names, Degree Types by clicking on the next available line.
   - Enter Transcript and Degree Discipline information as required.

For detailed instructions on entering **SCHOOLS AND COLLEGES** information, ***click here.***

3. Click the **SAVE** button and click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

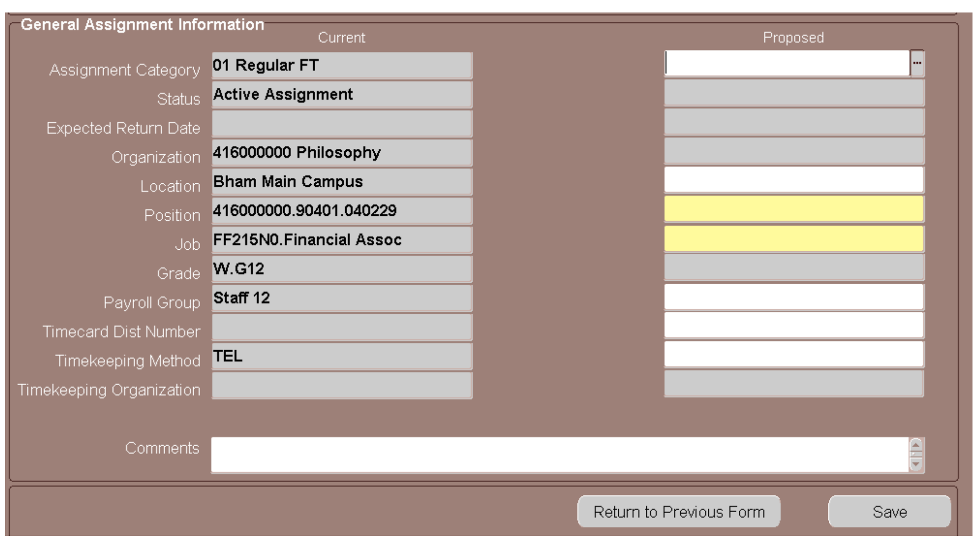
4. If the employee's ***campus addresses and/or campus phone information*** is changing, click on the **ADDRESS** button. The **ADDRESS** button is located on the **ACT MAIN FORM** and at the bottom of the **PERSON DATA** form.



For Instructions on entering or changing address and phone information, ***click here.***

Changing Assignment Information

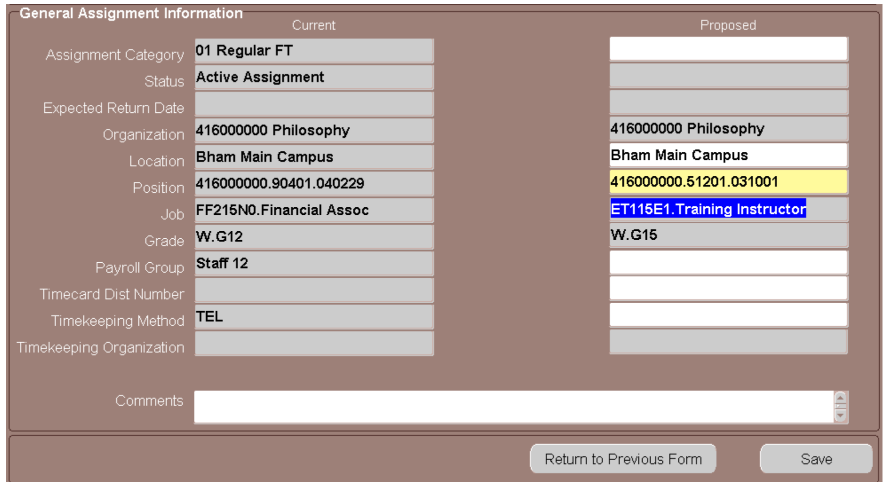
1. To change the employee's ***assignment information***, click on the **ASSIGNMENT** button located on the **ACT MAIN FORM.**



2. If the employee's **ASSIGNMENT CATEGORY** will be changing, select the appropriate **ASSIGNMENT CATEGORY** from the LOV or type it in the field. This is not a required field when using the **PROMOTION SAME DEPARTMENT** document reason.

3. The **POSITION** and **JOB** fields are required fields when using the **PROMOTION SAME DEPARTMENT** document reason.

4. Click in the **POSITION** field and select the ***appropriate position code*** from the LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. The selection of position code populates the **ORGANIZATION, LOCATION, JOB** and **GRADE** fields.



5. The **PAYROLL GROUP** and all three **TIMEKEEPING** fields are available for change or update if necessary.

6. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.

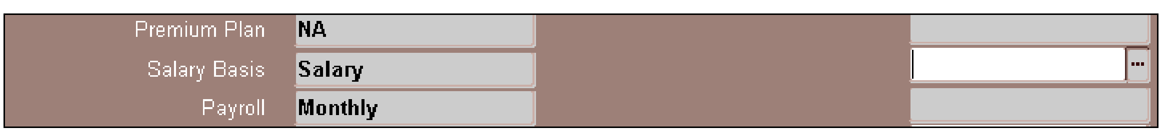
7. Click on the **SAVE** button.

8. Click on the **RETURN TO PREVIOUS FORM** button.

Changing Salary Information

1. To change the Salary information, click on the **SALARY** button, located on the **ACT MAIN FORM**.

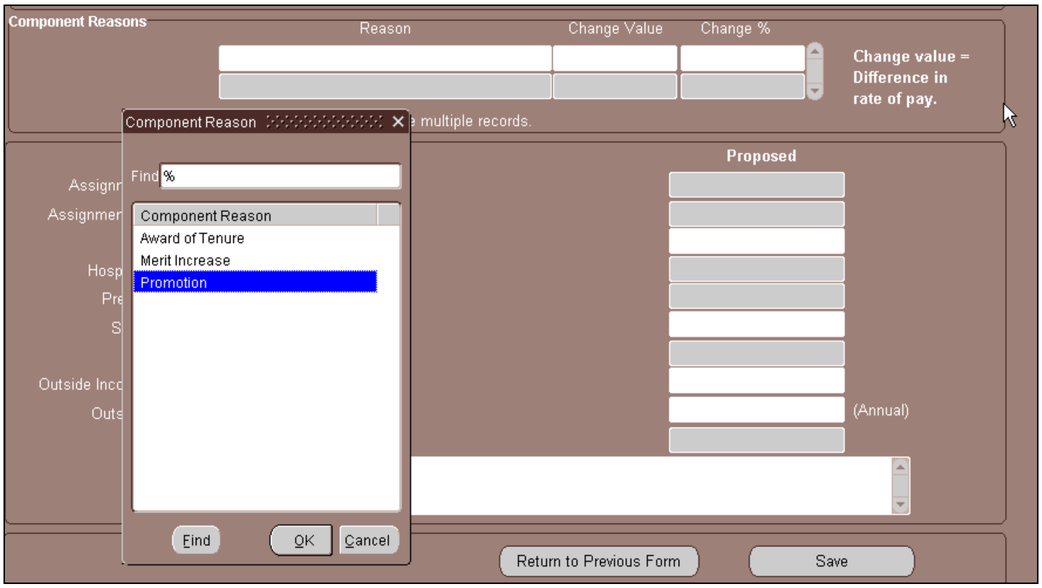
2. Click in the **PROPOSED SALARY BASIS** field if required.



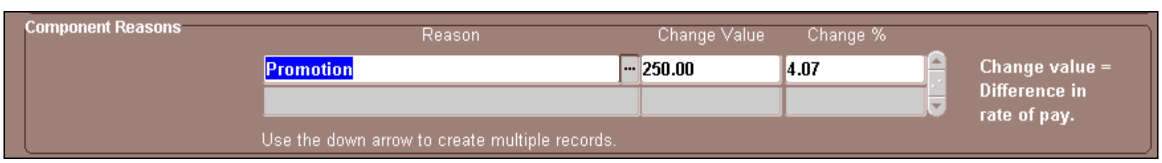
3. Use the LOV to enter the correct **SALARY BASIS** information or type it in. This field will vary based on other field information such as ***Organization*** and ***Position***.

4. Click **OK**. The **PROPOSED SALARY BASIS** and **PAYROLL** fields will populate.

5. Click in the **REASONS** field located at the top of the form, select **PROMOTION** from the LOV.



6. Enter the amount of increase or decrease in the ***hourly rate*** (for a bi-weekly paid employee) or the amount of increase or decrease in the ***monthly rate*** (for a salaried employee) in the **CHANGE VALUE** field. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.



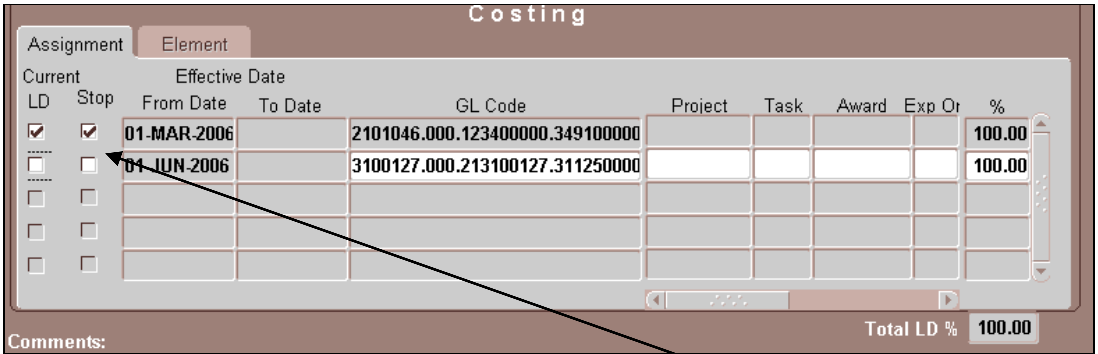
7. If the **FTE** is changing, enter the ***full-time equivalency*** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.

8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.

9. Click on the **RETURN TO PREVIOUS FORM** button.

<u>Changing Labor Source Information (General Ledger)</u>

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



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

2. If the employee has a GL funding source, click in the GL Code field.

    a. Click on the **GL CODE** LOV. This opens the **UAB_AKF FIND** window.

    b. Enter the ***ten-digit GL Account number*** in the **ALIAS** field; click **OK**. This opens the window below. All but the **OBJECT** field has been auto populated.

    c. Click in the **OBJECT** field and enter ***Zero* (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.

    d. Type in the ***percent of the employee's funding*** to be paid from the GL account string entered. **<u>Only one funding source is allowed for each record/row.</u>**

Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

    e. Repeat the above steps to enter all ***GL account*** funding sources. The **TOTAL LD %** field has to total **<u>100%</u>** before you can save the document.

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

    a. Type the ***project number*** in the **PROJECT** field or choose the ***Project number*** from the LOV. Press the **TAB** key or click in the next **TASK** field.

    b. Type the ***task number*** in the **TASK** field or choose the ***Task number*** from the LOV. **TAB** to the **AWARD** field or click in the **AWARD** field.

c. Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field. Type in the ***organization number*** or choose the ***Expenditure Organization number*** from the LOV.

Note: For the hospital, this will be 70. For the university, this will be 10.

4. Type in the ***percent of the employee's effort*** to be charged to the project number in the **%** field. Total percent must equal 100%/

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

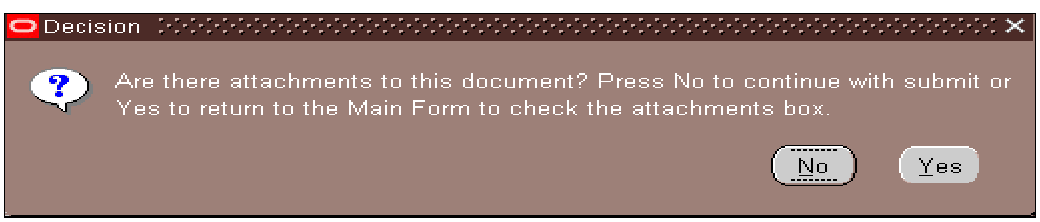
6. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

Submitting the Document

1. Click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. ***Click here*** for a listing of attachments required by Records Administration.

2. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.

3. Once the document is submitted the following window appears.



4. Click **YES** or **NO**, depending on whether **ATTACHMENTS** are required.

5. 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).

6. Once the 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**.

RETURN TO TOP