

## 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.

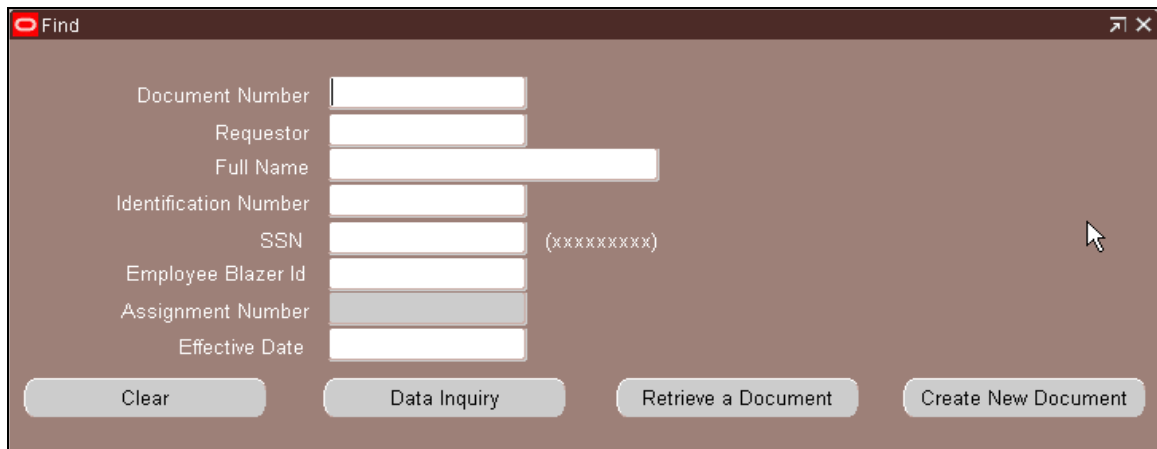
The **ASSIGNMENT**, **SALARY**, and **LABOR SOURCE** forms are available for change when using this document reason. If the employee's personal information is changing, the **PERSON DATA FORM** is available for update or change on selected fields.

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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.

The image shows a web-based form titled "Find" with a search icon and window controls. It contains several input fields for employee information: Document Number, Requestor, Full Name, Identification Number, SSN (with a placeholder "(xxxxxxx)"), Employee Blazer Id, Assignment Number, and Effective Date. At the bottom, there are four buttons: "Clear", "Data Inquiry", "Retrieve a Document", and "Create New Document".

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.

Doc_Reason	Doc_Type
NONRECURRING ELEMENT	ELEMENTS
OJI LEAVE WITH PAY	LEAVES
OJI LEAVE WITHOUT PAY	LEAVES
OJI/FAMILY MEDICAL LEAVE	LEAVES
PERSONAL LEAVE WITH PAY	LEAVES
PERSONAL LEAVE WITHOUT PAY	LEAVES
PROBATIONARY INCREASE	CHANGE
<b>PROMOTION SAME DEPARTMENT</b>	<b>CHANGE</b>
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES

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**.

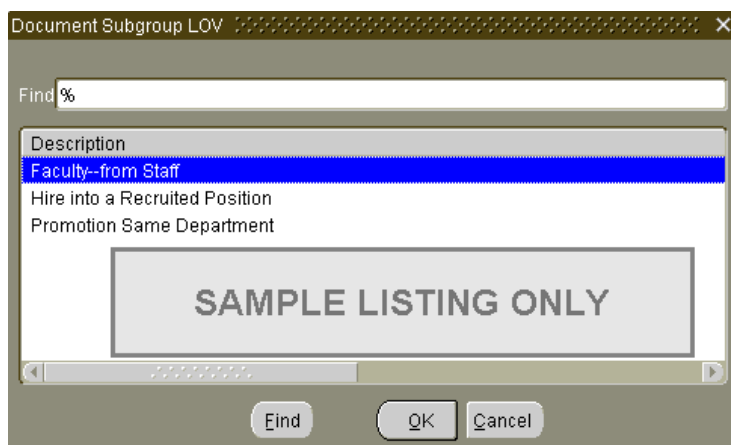
7. The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc SUBGROUP** field LOV.

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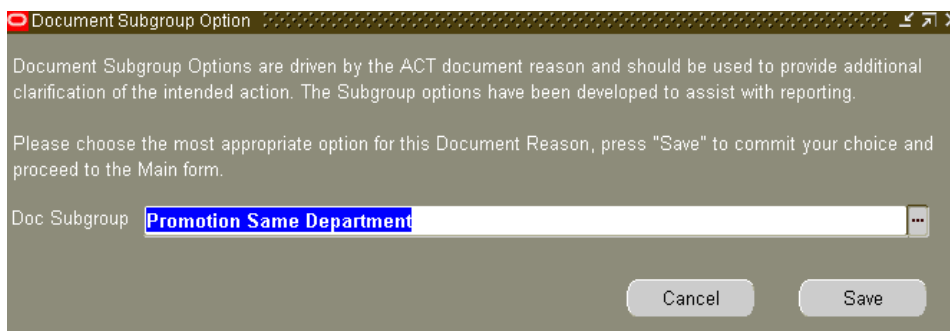
8. Select the description that best explains the nature of the transaction.

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](#).

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### 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 be available when using a **retroactive** document effective date.

The screenshot shows the main menu of the ACT system. At the top, there are several tabs: Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below these is a 'Comments' text area. In the center, there is a row of buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The 'Person Data' button is circled in red. At the bottom, there is a row of buttons: Save, Submit, Cancel this document, Log, Reassign, and a set of navigation arrows.

- 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.

The screenshot shows the 'Employment' tab in the ACT system. The 'Current' section has fields for Ethnic Origin (White), Veteran Status, I-9 Status (Yes), Visa Type, and Work Visa Expiration Date. The 'Proposed' section has corresponding empty fields. At the bottom, there is a 'Comments' text area and buttons for Address, Return to Previous Form, and Save.

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

The screenshot shows the 'Phonebook' tab in the ACT system. The 'Data used for the UAB Electronic Directory' section has fields for Individual Online List (Yes), Online Job Title, Online Display Name, and Faculty and Staff List (Yes). The 'Proposed' section has corresponding empty fields. At the bottom, there is a 'Comments' text area and buttons for Address, Return to Previous Form, and Save. A note on the right says: 'Assignment Job Title (Last Name, First Name) \*\*\* Please do not add suffix'.

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- 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.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	300 Non-Medical Certificate	01-JAN-1994	HD		

- 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.

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For detailed instructions on entering **SCHOOLS AND COLLEGES** information, [click here](#).

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

Address		Current	End Date	Current	Proposed
Address Type	<input type="text" value="Campus Primary"/>	<input type="checkbox"/>		<input type="text" value="Campus Primary"/>	
Building	<input type="text" value="HHB"/>			<input type="text"/>	
Room	<input type="text" value="415"/>			<input type="text"/>	
Address Line3	<input type="text" value="HERITAGE HALL"/>			<input type="text"/>	
City	<input type="text" value="Birmingham"/>			<input type="text"/>	
State	<input type="text" value="AL"/>			<input type="text"/>	
Zip Code	<input type="text" value="35294"/> - <input type="text" value="1152"/>			<input type="text"/> - <input type="text"/>	
		Use the down arrow to view multiple records.		Use the down arrow to create multiple records.	

Phones		Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/> Delete	<input type="checkbox"/> Current	Home	(205) 934-2339	24-DEC-2007
<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary	(205) 934-2339	24-DEC-2007
<input type="checkbox"/>	<input type="checkbox"/>	Work Fax	(205) 975-5712	24-DEC-2007
Use the down arrow to create multiple records.				

☐ International Address

Comments

For Instructions on entering or changing address and phone information, [click here](#).

### Changing Assignment Information

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

General Assignment Information		Current	Proposed
Assignment Category	<input type="text" value="01 Regular FT"/>		<input type="text"/>
Status	<input type="text" value="Active Assignment"/>		<input type="text"/>
Expected Return Date	<input type="text"/>		<input type="text"/>
Organization	<input type="text" value="416000000 Philosophy"/>		<input type="text"/>
Location	<input type="text" value="Bham Main Campus"/>		<input type="text"/>
Position	<input type="text" value="416000000.90401.040229"/>		<input type="text"/>
Job	<input type="text" value="FF215N0.Financial Assoc"/>		<input type="text"/>
Grade	<input type="text" value="W.G12"/>		<input type="text"/>
Payroll Group	<input type="text" value="Staff 12"/>		<input type="text"/>
Timecard Dist Number	<input type="text"/>		<input type="text"/>
Timekeeping Method	<input type="text" value="TEL"/>		<input type="text"/>
Timekeeping Organization	<input type="text"/>		<input type="text"/>
Comments		<input style="width: 100%;" type="text"/>	
		<input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/>	

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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.

General Assignment Information		Current	Proposed
Assignment Category	01 Regular FT		
Status	Active Assignment		
Expected Return Date			
Organization	416000000 Philosophy		416000000 Philosophy
Location	Bham Main Campus		Bham Main Campus
Position	416000000.90401.040229		416000000.51201.031001
Job	FF215N0.Financial Assoc		ET115E1.Training Instructor
Grade	W.G12		W.G15
Payroll Group	Staff 12		
Timecard Dist Number			
Timekeeping Method	TEL		
Timekeeping Organization			
Comments			

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.

Premium Plan	NA		
Salary Basis	Salary		...
Payroll	Monthly		

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**.

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

Salary Basis	Hourly		Salary
Payroll	Biweekly		MONTHLY

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

The screenshot shows the 'Component Reasons' section of the ACT form. A dropdown menu is open, displaying 'Promotion' as the selected reason. The 'Change Value' and 'Change %' fields are empty. The 'Proposed' section shows a grid of empty fields for salary and rate of pay.

- 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.

Reason	Change Value	Change %	
Promotion	250.00	4.07	

Change value = Difference in rate of pay.

Use the down arrow to create multiple records.

- 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.
- Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
- Click on the **RETURN TO PREVIOUS FORM** button.

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

### Changing Labor Source Information (General Ledger)

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**.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-MAR-2006	2101046.000.123400000.349100000					100.00
<input type="checkbox"/>	<input type="checkbox"/>	01-JUN-2006	3100127.000.213100127.311250000					100.00
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Comments:

Total LD % 100.00

**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. Only one funding source is allowed for each record/row.
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.

**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 **100%** before you can save the document.

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- 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.

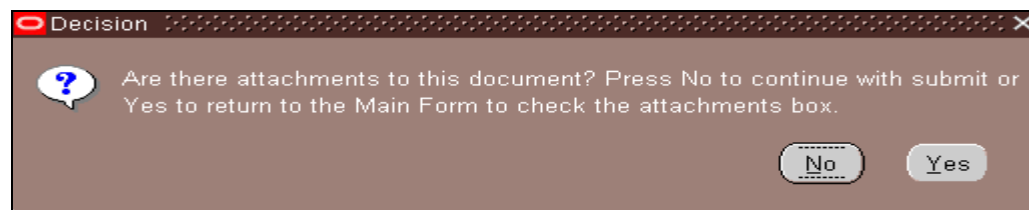
### **Submitting the Document**

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



The screenshot shows the 'ACT Main Form' window. It contains several input fields and checkboxes. The 'Document Reason' field is set to 'PROMOTION SAME DEPAR'. The 'Effective Date' is '03-APR-2011'. The 'Requestor Name' is 'HALEY'. The 'Document Number' is '536162'. The 'Document Status' is 'OPEN'. The 'Workflow Type' is 'CHANGE'. There are checkboxes for 'Attachments' (checked) and 'Received'. A 'Submit Date' field is also present.

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.



The screenshot shows a 'Decision' dialog box with a question mark icon. The text inside says: 'Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.' There are two buttons: 'No' and 'Yes'.

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).***

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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\*\*](#)