

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

The **RECLASSIFICATION** document reason is used when an employee will maintain the **same position number** with a **different job title** within the **same department**.

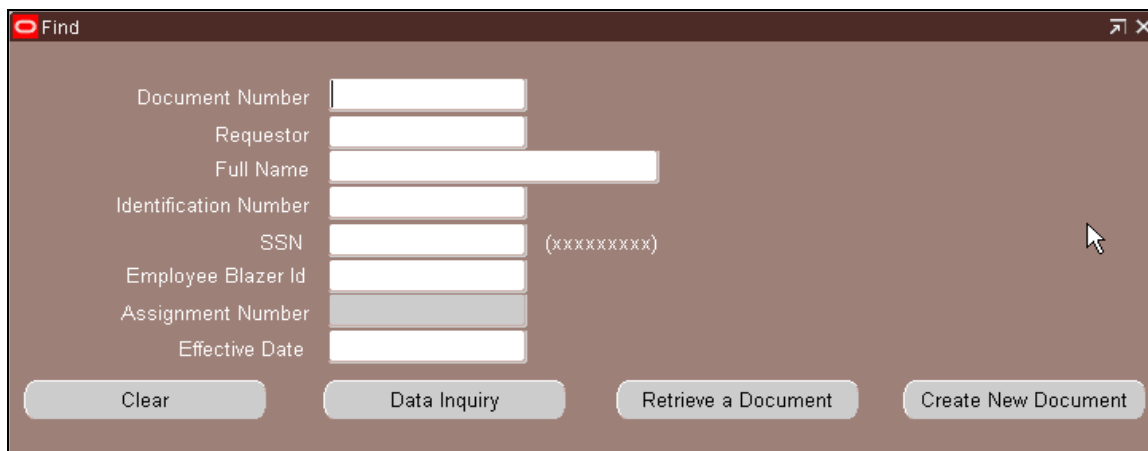
(Example of when the Reclassification document reason is used for Staff employees includes: Office Service Specialist II to Office Associate I or Clinical Research Nurse to Research Nurse Coordinator). (Example of when the Reclassification document reason is used for Faculty includes: Professor to Professor/Chairman, or vice versa; this document reason should be a very rare occurrence for faculty).

The **RECLASSIFICATION** document reason requires supporting documentation of approval from Compensation; and **may or may not** involve a salary change.

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

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.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

4. Use the **DOCUMENT REASON** LOV to choose or type the word **Reclassification** in the **DOCUMENT REASON** field.

| Doc_Reason | Doc_Type |
|----------------------------|-------------|
| PERSONAL LEAVE WITH PAY | LEAVES |
| PERSONAL LEAVE WITHOUT PAY | LEAVES |
| PROBATIONARY INCREASE | CHANGE |
| PROMOTION SAME DEPARTMENT | CHANGE |
| RECLASSIFICATION | CHANGE |
| RECURRING | ELEMENTS |
| REFUND | ELEMENTS |
| REHIRE | HIRE |
| RETURN FROM LEAVE | LEAVES |
| SABBATICAL FULL PAY | LEAVES |
| SABBATICAL HALF PAY | LEAVES |
| SALARY SCHEDULE ADJUSTMENT | CHANGE |
| TERMINATE EMPLOYEE | TERMINATION |

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 reclassification 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.

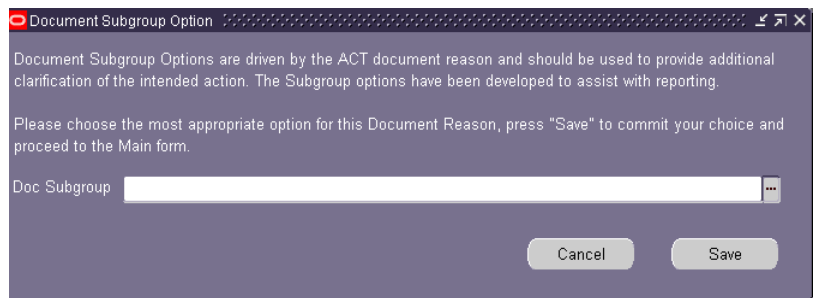
Copy and paste link into URL:

<http://uabcalendar.infomedia.com/ActiveDataCalendar>

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

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

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



Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

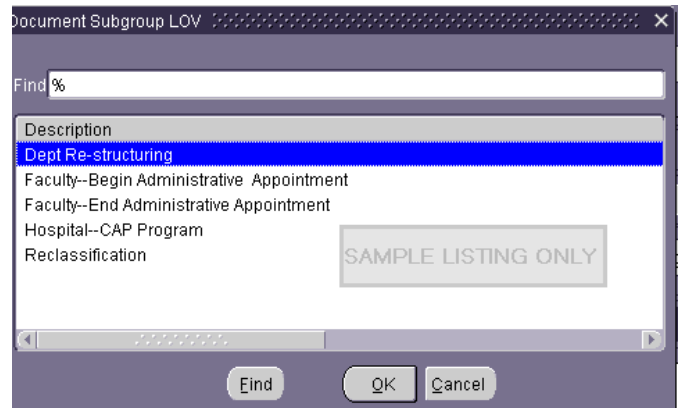
Doc Subgroup

Cancel Save

8. Select the description which 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.



Document Subgroup LOV

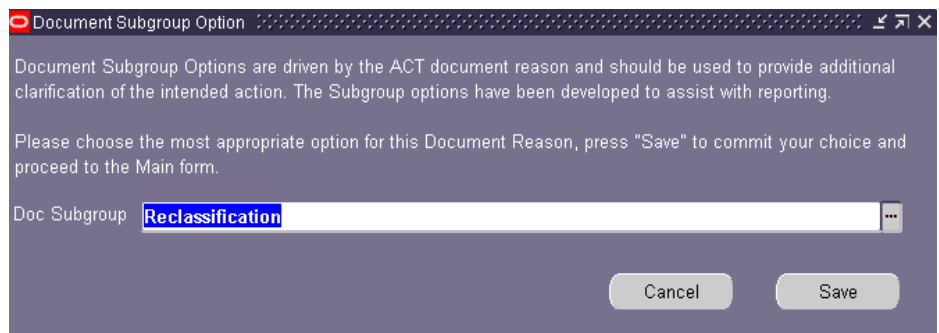
Find %

| Description |
|---|
| Dept Re-structuring |
| Faculty--Begin Administrative Appointment |
| Faculty--End Administrative Appointment |
| Hospital--CAP Program |
| Reclassification |

SAMPLE LISTING ONLY

Find OK Cancel

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



Document Subgroup Option

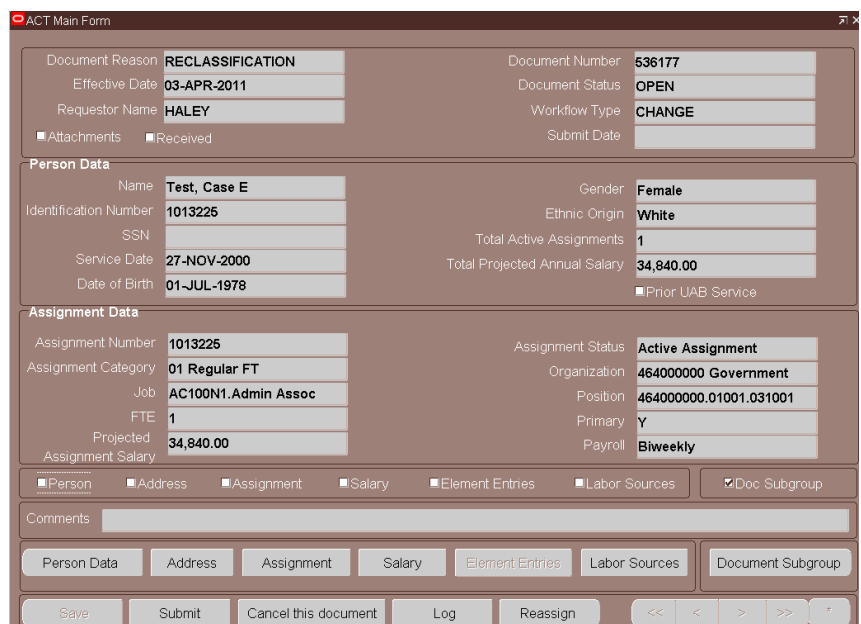
Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup **Reclassification**

Cancel Save

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



ACT Main Form

| | | | |
|--|------------------|-----------------|--------|
| Document Reason | RECLASSIFICATION | Document Number | 536177 |
| Effective Date | 03-APR-2011 | Document Status | OPEN |
| Requestor Name | HALEY | Workflow Type | CHANGE |
| <input type="checkbox"/> Attachments <input type="checkbox"/> Received | | Submit Date | |

Person Data

| | | | |
|-----------------------|--------------|--|-----------|
| Name | Test, Case E | Gender | Female |
| Identification Number | 1013225 | Ethnic Origin | White |
| SSN | | Total Active Assignments | 1 |
| Service Date | 27-NOV-2000 | Total Projected Annual Salary | 34,840.00 |
| Date of Birth | 01-JUL-1978 | <input type="checkbox"/> Prior UAB Service | |

Assignment Data

| | | | |
|-----------------------------|---------------------|-------------------|------------------------|
| Assignment Number | 1013225 | Assignment Status | Active Assignment |
| Assignment Category | 01 Regular FT | Organization | 464000000 Government |
| Job | AC100N1.Admin Assoc | Position | 464000000.01001.031001 |
| FTE | 1 | Primary | Y |
| Projected Assignment Salary | 34,840.00 | Payroll | Biweekly |

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

Comments

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

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

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

12. If the employee's personal information **will not** be changing, [click here](#). To make changes in the employee's personal information, proceed onto **Step #13**.

Changing Personal Data

13. 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.

- a. 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.

- b. 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.

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

- a. If Schools and Colleges information displays and is **accurate**, click on the

| 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 | | |
| | | | | | |
| | | | | | |
| | | | | | |

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

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](#).

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

Changing Assignment Information

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

The screenshot shows the top section of the ACT MAIN FORM. It includes a row of checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below this is a Comments field. A row of buttons includes Person Data, Address, Assignment (circled in red), Salary, Element Entries, Labor Sources, and Document Subgroup. At the bottom are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

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 **RECLASSIFICATION** document reason.

The screenshot shows the 'General Assignment Information' form. It has two columns: 'Current' and 'Proposed'. The 'Current' column contains the following data: Assignment Category (01 Regular FT), Status (Active Assignment), Expected Return Date, Organization (464000000 Government), Location (Bham Main Campus), Position (464000000.01001.031001), Job (AC100N1.Admin Assoc), Grade (W.G13), Payroll Group (Staff 12), Timecard Dist Number, Timekeeping Method (TEL), and Timekeeping Organization. The 'Proposed' column has empty fields for the same information. A Comments field is at the bottom, and buttons for 'Return to Previous Form' and 'Save' are at the bottom right.

3. The **POSITION** and **JOB** fields are required fields when using the **RECLASSIFICATION** document reasons. Click in the **POSITION** field.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

Note: When using the **RECLASSIFICATION** document reason, the employee is to maintain the **SAME** position number.

4. Type in the **POSITION** field the **first two segments** of the **Current Position String**. See example below:

The screenshot shows a form titled "General Assignment Information" with two columns: "Current" and "Proposed". The "Current" column contains the following data:

| Field | Value |
|--------------------------|------------------------|
| Assignment Category | 01 Regular FT |
| Status | Active Assignment |
| Expected Return Date | |
| Organization | 464000000 Government |
| Location | Bham Main Campus |
| Position | 464000000.01001.031001 |
| Job | AC100N1.Admin Assoc |
| Grade | W.G13 |
| Payroll Group | Staff 12 |
| Timecard Dist Number | |
| Timekeeping Method | TEL |
| Timekeeping Organization | |

A red box highlights the "Position" field in the "Current" column, and a red arrow points from this box to the "Proposed" column, where the value "464000000.01001" is entered in the corresponding field.

5. After entering the **first two segments** of the **Current Position String**, click in the **JOB** field.
6. The window similar to the one below will open.

The screenshot shows a "Position" search window. The "Find" field contains the text "464000000.01001%". Below the search field is a table with two columns: "Name" and "Job".

| Name | Job |
|------------------------|------------------------|
| 464000000.01001.031001 | AC100N1.Admin Assoc |
| 464000000.01001.110301 | BC201N7.Budget Officer |

At the bottom of the window are three buttons: "Find", "OK", and "Cancel".

Note: Two position strings will display; the current position string and Job title; as well as, the new reclassified position string and Job Title. If the reclassified position and job title does not appear in the listing, contact Budget Administration for assistance.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

7. Select the **new reclassified position string and job title**; click **OK**. The selection of the position string populates **JOB** and **GRADE** fields.
8. The **LOCATION**, **PAYROLL GROUP**, and all three **TIMEKEEPING** fields are available for change or update if necessary.
9. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
10. Click on the **SAVE** button.
11. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

Changing Salary Information

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

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

3. 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.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

4. 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.
5. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
6. Click on the **RETURN TO PREVIOUS FORM** button.

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 **ASSIGNMENT FORM** or from the **ACT MAIN FORM**.

Assignment Salary **41,110.00** Element Name

Costing

| Assignment | | Element | | Effective Date | | GL Code | Project | Task | Award | Exp Or | % |
|-------------------------------------|-------------------------------------|-------------|---------|---------------------------------|--------|---------|---------|------|-------|--------|--------|
| Current LD | Stop | From Date | To Date | | | | | | | | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 02-OCT-2005 | | 3100127.000.213100127.311250000 | | | | | | | 100.00 |
| <input type="checkbox"/> | <input type="checkbox"/> | 07-MAY-2006 | | | 224049 | 03.02 | 1524049 | 10 | | | 60.00 |
| <input type="checkbox"/> | <input type="checkbox"/> | 07-MAY-2006 | | 3100127.000.213100127.311250000 | | | | | | | 40.00 |
| <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.**

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.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document

- 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.
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.
 - f. 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.
 - g. 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.
 - d. 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.

- e. Type in the **percent of the employee's effort** to be charged to the project number in the % field.

Note: TOTAL LD% must equal 100% before you can save the document.

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

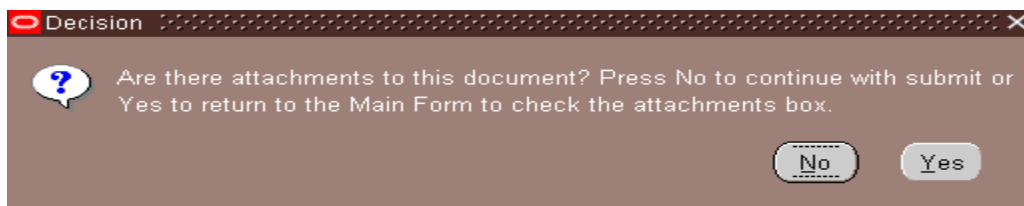
1. Click the **ATTACHMENTS** checkbox if documentation is being forwarded to Records Administration. [Click here](#) for a listing of attachments required by Records Administration.



The screenshot shows the 'ACT Main Form' window. It contains several fields for document information: Document Reason (RECLASSIFICATION), Effective Date (03-APR-2011), Requestor Name (HALEY), Document Number (536177), Document Status (OPEN), Workflow Type (CHANGE), and Submit Date. There are checkboxes for 'Attachments' (checked) and 'Received' (unchecked). An arrow points from the 'Attachments' checkbox to the text 'Click here' in the instructions above.

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.

Appoint, Change and Terminate (ACT) Documentation Reclassification Document



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**](#)