

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

The **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason is used when an employee is transferring to a **different** organization.

The employee could be transferring with the same job classification or a different job classification, but the pay grade of both job classifications **must remain the same** (in some cases, the proposed pay grade could be lower than the current pay grade). If the proposed job classification is a **higher pay grade** than the current pay grade or, if a student employee (06) is transferring to an irregular part-time (04) employee in a different department, use the **Transfer with Promotion** document reason.

**Note:** *The employee's current (Transfer Out) organization creates the document and **reassigns** the document to the new organizations Requestor. The new Requestor should be able to locate the document by reviewing the list of documents for their requestor name, by the document number or the employee's name, identification number, or Social Security Number.*

Also used when a faculty member is transferring to another organization where **no promotion** is associated with the change; or transferring to a staff position within a different organization. May or may not involve a salary change.

The Transfer In organization will complete or update the following forms/tabs: **ADDRESS/PHONE** (campus information only), **SCHOOLS AND COLLEGES**, **ASSIGNMENT**, **SALARY**, and **LABOR SOURCE**.

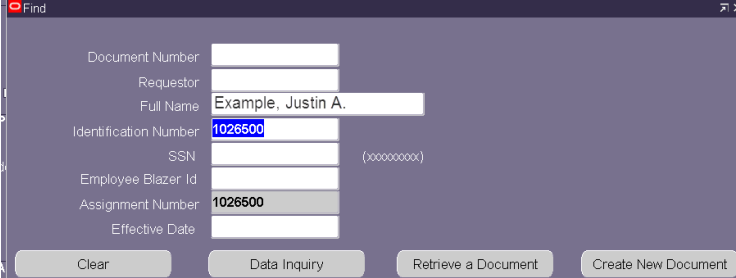
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**UAB HR Officer → HR Transactions → ACT → Find Window**

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### **Current (Transfer Out) Organization:**

1. Locate individual using the ACT Find window; click on the Create New Document button.



The screenshot shows the 'Find' window in the ACT system. It contains the following fields and values:

Field	Value
Document Number	
Requestor	
Full Name	Example, Justin A.
Identification Number	1028500
SSN	(xxxxxxxx)
Employee Blazer Id	
Assignment Number	1028500
Effective Date	

At the bottom, there are four buttons: 'Clear', 'Data Inquiry', 'Retrieve a Document', and 'Create New Document'.

**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.*

2. The **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON** field.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

ACT Main Form

Document Reason [ ] Document Number [ ]

Effective Date [ ] Document Status [ ]

Requestor Name: **HALEY** Workflow Type [ ]

Submit Date [ ]

☐ Attachments ☐ Received

3. Use the **DOCUMENT REASON** LOV to choose or type the words **Transfer Lateral/Different Department** in the **DOCUMENT REASON** field.

Document Reason

Find: %transfer%

Doc_Reason	Doc_Type
TRANSFER LATERAL/DIFFERENT DEPT	CHANGE
TRANSFER LATERAL/SAME DEPT	CHANGE
TRANSFER WITH PROMOTION	CHANGE

Find OK Cancel

4. Click on the **OK** button.

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

ACT Main Form

Document Reason: **TRANSFER LATERAL/DIFFERENT DEPT**

Effective Date: **25-SEP-2011**

Requestor Name: **HALEY**

☐ Attachments ☐ Received

**Note:** The Document Effective Date for all bi-weekly paid employees receiving a Transfer Lateral 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.

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

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

8. Select the **DESCRIPTION** which best explains the nature of the transaction.

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

Document Subgroup LOV

Find %

Description
Dept Re-organization
Employee to Trainee
Faculty--Change of Locus
Faculty--to Staff
Hospital--Change in Premium Plan
Hospital--Org Distribution# Change Only
Reassignment
Trainee to Employee
Transfer Lateral/Different Dept

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 **Dept Re-organization**

Cancel Save

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

Person Address Assignment Salary

Comments

Person Data Address Assignment Salary

Save Submit Cancel this document

12. To reassign the ACT document to a requestor in the new org, click on the **REASSIGN** button located at the bottom the **ACT MAIN FORM**.

ACT Main Form

Document Reason	TRANSFER LATERAL/DIFFE	Document Number	560164
Effective Date	25-SEP-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
Attachments	Received	Submit Date	

Person Data

Name	Example, Justin A.	Gender	Female
Identification Number	1234567	Ethnic Origin	White
SSN		Total Active Assignments	1
Service Date	03-MAR-2004	Total Projected Annual Salary	XX,XXX.XX
Date of Birth	01-OCT-1965	Prior UAB Service	

Assignment Data

Assignment Number	1234567	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	469200000 History & Anthrc
Job	AC100N1 Admin Assoc	Position	469200000.90401.090927
FTE	1	Primary	Y
Projected Assignment Salary	XX,XXX.XX	Payroll	Biweekly

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

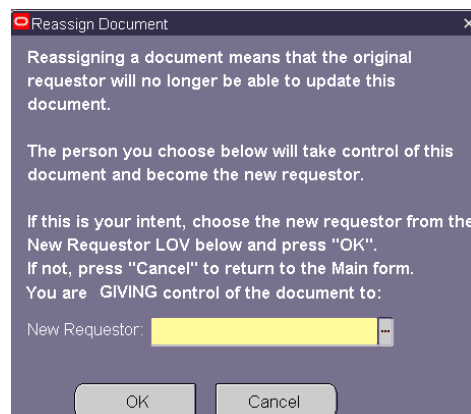
Save Submit Cancel this document Log Reassign

## Appoint, Change and Terminate (ACT) Documentation

### Transfer Lateral Different Department

A message box similar to the message on the right should appear:

13. Click inside the **NEW REQUESTOR** field and enter the ***Requestor's last name, first name*** as it is listed in Oracle or use the LOV to locate the Requestor who will be receiving the reassigned document.



14. Once the New Requestor field is populated, click **OK**.

### New (Transfer In) Organization

1. Use the **FIND WINDOW** to locate the reassigned document.

2. Click on the **RETRIEVE A DOCUMENT** button. The **ACT MAIN FORM** opens.

### Changing Personal Data

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.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

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 << < > >> \*

- 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.

Personal Employment Phonebook License Termination Schools and Colleges

	Current	Proposed
Ethnic Origin	White	
Veteran Status		
I-9 Status	Yes	
Visa Type		
Work Visa Expiration Date		

Comments

Address Return to Previous Form 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.

Personal Employment Phonebook License Termination Schools and Colleges

Data used for the UAB Electronic Directory

	Current	Proposed
Individual Online List	Yes	
Online Job Title		
Online Display Name		
Faculty and Staff List	Yes	

☐ Assignment Job Title  
(Last Name, First Name)  
\*\*\* Please do not add suffix

Comments

Address Return to Previous Form Save

- 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

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

- 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.

3. 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.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

- Enter Transcript and Degree Discipline information as required.

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

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

5. 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 **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.

3. The **ORGANIZATION**, **LOCATION** and **POSITION** fields are required fields when using the **TRANSFER LATERAL DIFFERENT DEPARTMENT** document reason.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

- Click in the **POSITION** field and select the **appropriate position numbers** 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	01 Regular FT
Status		Active Assignment	
Expected Return Date			
Organization		469200000 History & Anthropology	416000000 Philosophy
Location		Bham Main Campus	Bham Main Campus
Position		469200000.90401.090927	416000000.40001.050701
Job		AC102N1.Admin Support Spec	AC102N1.Admin Support Spec
Grade		W.G11	W.G11
Payroll Group		Staff 12	Staff 12
Timecard Dist Number			
Timekeeping Method		TEL	TEL
Timekeeping Organization			
Comments			

Return to Previous Form    Save

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

### Changing Salary Information

- To change the Salary information, click on the **SALARY** button, located on the **ACT MAIN FORM**.
- If required, click in the **SALARY BASIS** field and select correct salary basis from the LOV. (**Note:** This field will vary based on other field information such as **Organization** and **Position**). Click **OK**.

Salary Information		Current	Proposed
Projected Assignment Salary		34,840.00	
Actual Assignment Rate of Pay		16.75	
FTE		1.00	
Hosp Calc Code			
Premium Plan		NA	NA
Salary Basis		Hourly	HOURLY
Payroll		Biweekly	Biweekly
Outside Income Source			
Outside Income		0.00	
CFB Code			
Comments			

Return to Previous Form    Save

- When changing the employee's **ACTUAL ASSIGNMENT RATE OF PAY**, click in the **REASON** field located in the **COMPONENT REASONS** section. Select the appropriate reason from **COMPONENT REASON** LOV listing. Click **OK**.

Component Reasons		Reason	Change Value	Change %
Projected Assignment Salary				
Actual Assignment Rate of Pay				
FTE				
Hosp Calc Code				
Premium Plan				
Salary Basis				
Payroll				
Outside Income Source				
Outside Income				
CFB Code				
Comments				

Return to Previous Form    Save



## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

- 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 if necessary. When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** will automatically populate.

Component Reasons	Reason	Change Value	Change %
	Transfer Adjustment	0.71	3.00
Use the down arrow to create multiple records.			

Change value = Difference in rate of pay.

- If the **FTE** is changing, enter the **full-time equivalency** for the employee in the **FTE** field.
- 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.

### Changing Labor Source Information (General Ledger)

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

Projected Assignment Salary 
Element Name

**Costing**

Assignment		Element		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-OCT-2008			2101408.000.124600000.46920000						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"/>										

Comments:
Total LD % 100.00

Return to Previous Form
Save

**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.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

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.**
- 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.**

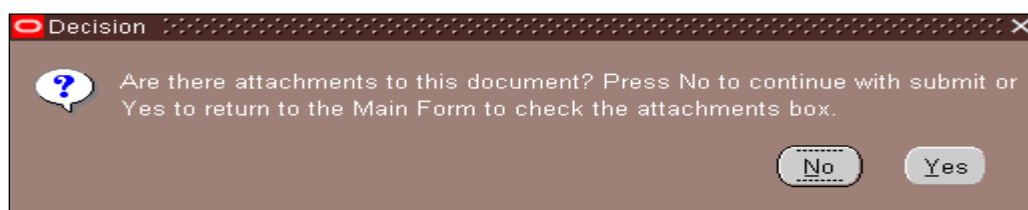
- f. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.

## Appoint, Change and Terminate (ACT) Documentation Transfer Lateral Different Department

- 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.
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**.

**Appoint, Change and Terminate (ACT) Documentation**  
**Transfer Lateral Different Department**

**[RETURN TO TOP](#)**