

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**.

UAB HR Officer → HR Transactions → ACT → Find Window

Current (Transfer Out) Organization:

1. Locate individual using the ACT Find window; 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.

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

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ACT Main Form

Document Reason	<input type="text"/>	...
Effective Date	<input type="text"/>	
Requestor Name	HALEY	
<input type="checkbox"/> Attachments		<input type="checkbox"/> Received
Document Number	<input type="text"/>	
Document Status	<input type="text"/>	
Workflow Type	<input type="text"/>	
Submit Date	<input type="text"/>	

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

Document Reason

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

Find %transfer%

Buttons: Find, OK, Cancel

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
<input type="checkbox"/> Attachments	
<input type="checkbox"/> 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.infodata.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	...
--------------	-----

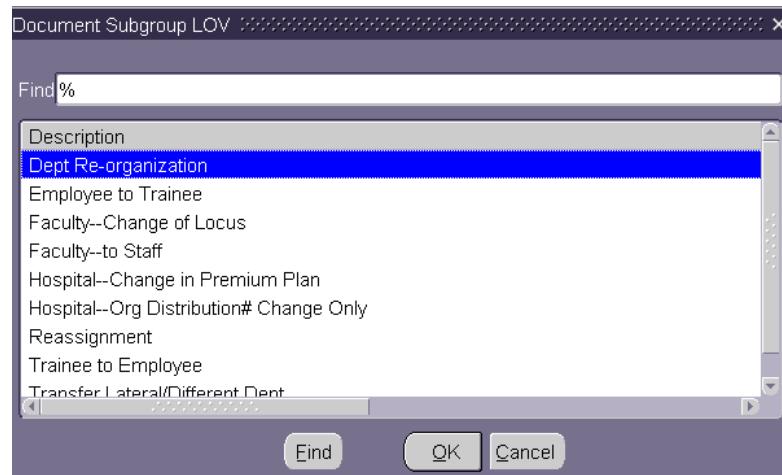
Buttons: Cancel, Save

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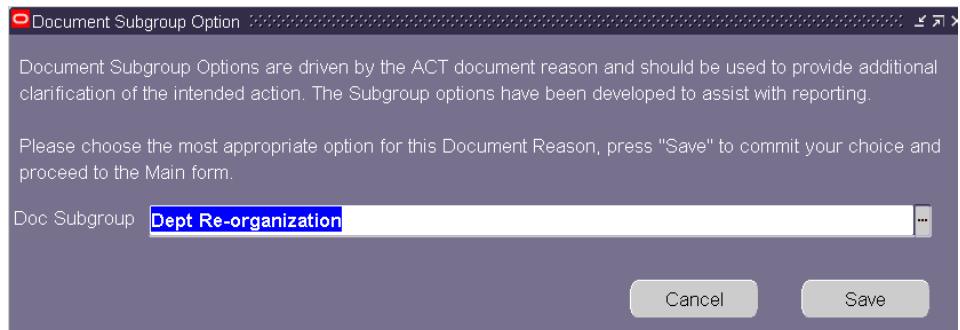
Transfer Lateral Different Department

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

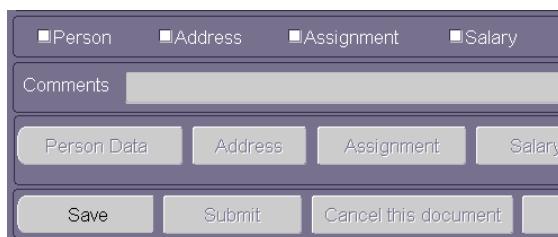
9. Click on **OK** to select.



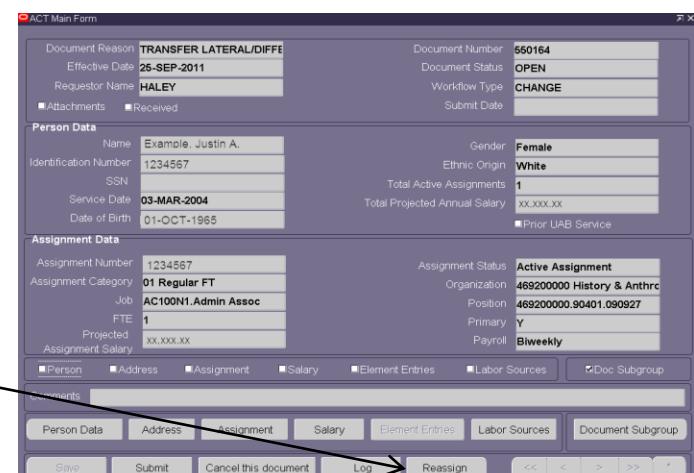
10. Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.



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



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**.

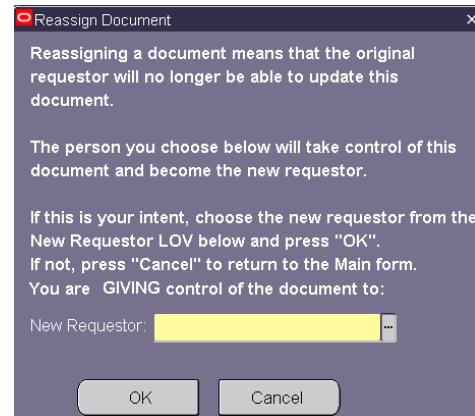


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A message box similar to the message on the right should appear:

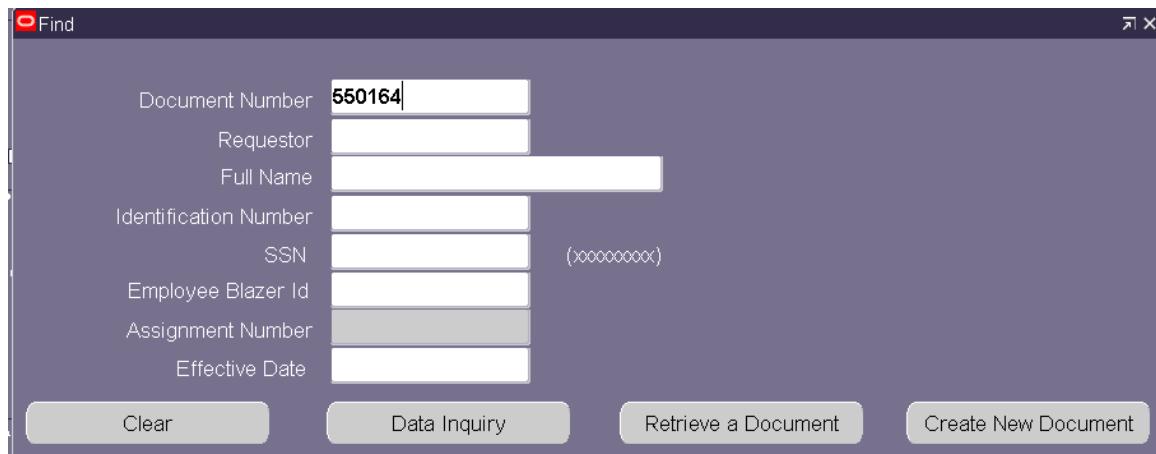
13. Click inside the **NEW REQUESTOR** field and enter the **Requestor's last name, first name** as it is listed in Oracle or use the LOV to locate the Requestor who will be receiving the reassigned document.



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

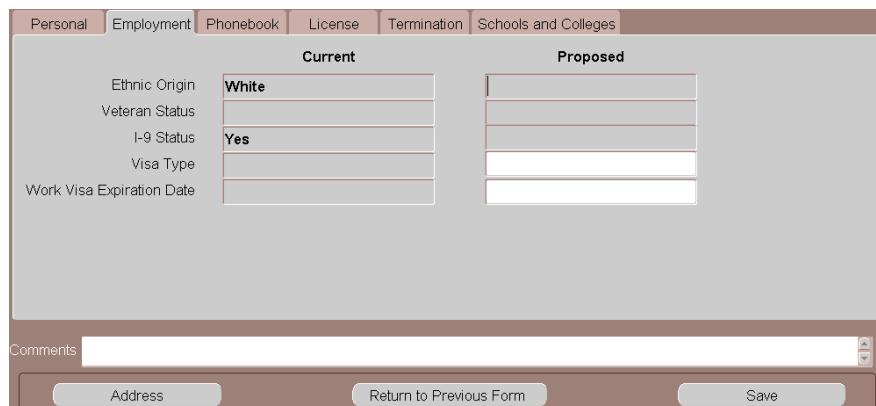
If **personal information** pertaining to the employee is changing, click on the **PERSON DATA** button. Most tabs and fields (except for the **PERSONAL** tab) will be available for change or update when using a **current** or **future** document effective date. Limited tabs and fields will available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

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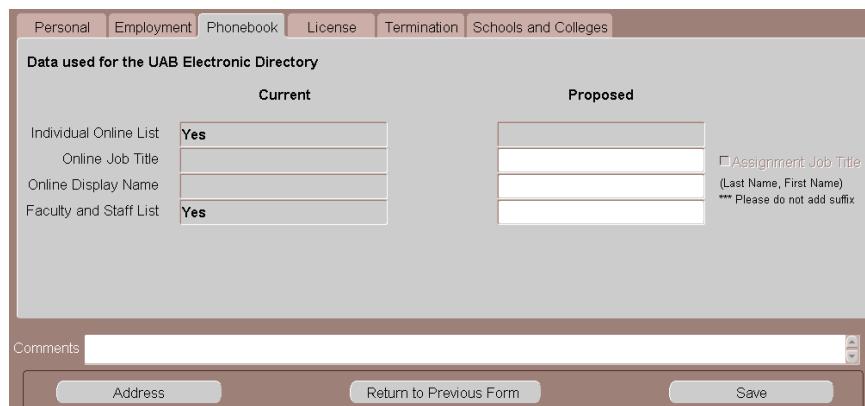
This screenshot shows the top navigation bar of the ACT form. It includes tabs for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the tabs is a 'Comments' field and a row of buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. At the bottom are buttons for Save, Submit, Cancel this document, Log, Reassign, and 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.



This screenshot shows the Employment tab of the ACT form. It displays fields for Current and Proposed visa information. The Current section shows 'Ethnic Origin' as 'White' and 'Veteran Status' as 'Yes'. The Proposed section is empty. Below the tabs is a 'Comments' field and a row of 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.



This screenshot shows the Phonebook tab of the ACT form. It displays fields for Current and Proposed directory data. The Current section shows 'Individual Online List' as 'Yes' and 'Online Job Title' as 'Yes'. The Proposed section is empty. Below the tabs is a 'Comments' field and a row of buttons for Address, Return to Previous Form, and 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

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Personal Employment Phonebook License Termination Schools and Colleges

License/Certificate/Membership Information

Current		Proposed	
Type	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expiration Date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use down arrow to create multiple records.

Comments

Address Return to Previous Form Save

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.

Personal Employment Phonebook License Termination Schools and Colleges

Termination

Current		Proposed	
Actual Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
Projected Last Day	<input type="text"/>	<input type="text"/>	<input type="text"/>
Leaving Reason	<input type="text"/>	<input type="text"/>	<input type="text"/>
Rehire Recommendation	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
Recommendation Reason	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Address Return to Previous Form Save

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

Personal Employment Phonebook License Termination Schools and Colleges

Schools and Colleges

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	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Address Return to Previous Form Save

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

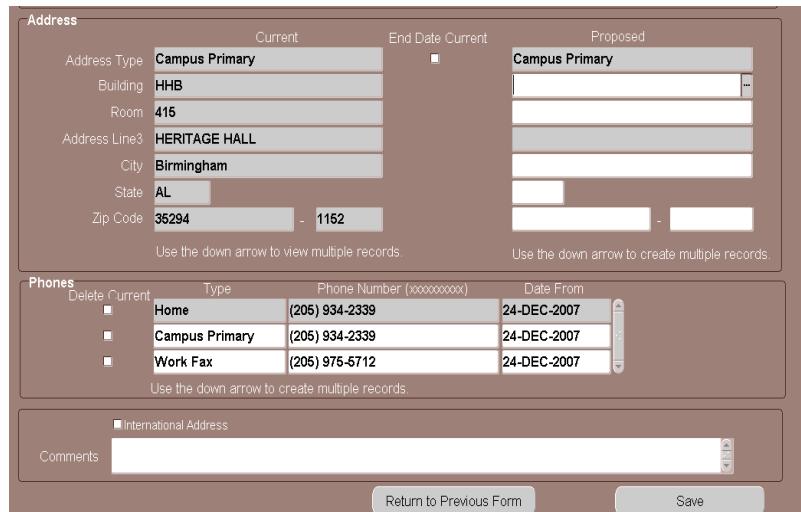
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- Enter Transcript and Degree Discipline information as required.

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.



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**.
- 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.



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

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- 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																																																	
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Current</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Assignment Category</td> <td style="width: 85%;">01 Regular FT</td> </tr> <tr> <td>Status</td> <td>Active Assignment</td> </tr> <tr> <td>Expected Return Date</td> <td></td> </tr> <tr> <td>Organization</td> <td>469200000 History & Anthropology</td> </tr> <tr> <td>Location</td> <td>Bham Main Campus</td> </tr> <tr> <td>Position</td> <td>469200000.90401.090927</td> </tr> <tr> <td>Job</td> <td>AC102N1.Admin Support Spec</td> </tr> <tr> <td>Grade</td> <td>W.G11</td> </tr> <tr> <td>Payroll Group</td> <td>Staff 12</td> </tr> <tr> <td>Timecard Dist Number</td> <td></td> </tr> <tr> <td>Timekeeping Method</td> <td>TEL</td> </tr> <tr> <td>Timekeeping Organization</td> <td></td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Comments</div>	Assignment Category	01 Regular FT	Status	Active Assignment	Expected Return Date		Organization	469200000 History & Anthropology	Location	Bham Main Campus	Position	469200000.90401.090927	Job	AC102N1.Admin Support Spec	Grade	W.G11	Payroll Group	Staff 12	Timecard Dist Number		Timekeeping Method	TEL	Timekeeping Organization		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Proposed</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Assignment Category</td> <td style="width: 85%;">01 Regular FT</td> </tr> <tr> <td>Status</td> <td></td> </tr> <tr> <td>Expected Return Date</td> <td></td> </tr> <tr> <td>Organization</td> <td>416000000 Philosophy</td> </tr> <tr> <td>Location</td> <td>Bham Main Campus</td> </tr> <tr> <td>Position</td> <td>416000000.40001.050701</td> </tr> <tr> <td>Job</td> <td>AC102N1.Admin Support Spec</td> </tr> <tr> <td>Grade</td> <td>W.G11</td> </tr> <tr> <td>Payroll Group</td> <td>Staff 12</td> </tr> <tr> <td>Timecard Dist Number</td> <td></td> </tr> <tr> <td>Timekeeping Method</td> <td>TEL</td> </tr> <tr> <td>Timekeeping Organization</td> <td></td> </tr> </table>	Assignment Category	01 Regular FT	Status		Expected Return Date		Organization	416000000 Philosophy	Location	Bham Main Campus	Position	416000000.40001.050701	Job	AC102N1.Admin Support Spec	Grade	W.G11	Payroll Group	Staff 12	Timecard Dist Number		Timekeeping Method	TEL	Timekeeping Organization	
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- 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**.

Projected Assignment Salary																																													
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Current</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Projected Assignment Salary</td> <td style="width: 85%;">34,840.00</td> </tr> <tr> <td>Actual Assignment Rate of Pay</td> <td>16.75</td> </tr> <tr> <td>FTE</td> <td>1.00</td> </tr> <tr> <td>Hosp Calc Code</td> <td></td> </tr> <tr> <td>Premium Plan</td> <td>NA</td> </tr> <tr> <td>Salary Basis</td> <td>Hourly</td> </tr> <tr> <td>Payroll</td> <td>Biweekly</td> </tr> <tr> <td>Outside Income Source</td> <td></td> </tr> <tr> <td>Outside Income</td> <td>0.00</td> </tr> <tr> <td>CFB Code</td> <td></td> </tr> <tr> <td>Comments</td> <td></td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Proposed</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Projected Assignment Salary</td> <td style="width: 85%;">34,840.00</td> </tr> <tr> <td>Actual Assignment Rate of Pay</td> <td>16.75</td> </tr> <tr> <td>FTE</td> <td>1.00</td> </tr> <tr> <td>Hosp Calc Code</td> <td></td> </tr> <tr> <td>Premium Plan</td> <td>NA</td> </tr> <tr> <td>Salary Basis</td> <td>Hourly</td> </tr> <tr> <td>Payroll</td> <td>Biweekly</td> </tr> <tr> <td>Outside Income Source</td> <td></td> </tr> <tr> <td>Outside Income</td> <td>0.00</td> </tr> <tr> <td>CFB Code</td> <td></td> </tr> <tr> <td>Comments</td> <td></td> </tr> </table>	Projected Assignment Salary	34,840.00	Actual Assignment Rate of Pay	16.75	FTE	1.00	Hosp Calc Code		Premium Plan	NA	Salary Basis	Hourly	Payroll	Biweekly	Outside Income Source		Outside Income	0.00	CFB Code		Comments		Projected Assignment Salary	34,840.00	Actual Assignment Rate of Pay	16.75	FTE	1.00	Hosp Calc Code		Premium Plan	NA	Salary Basis	Hourly	Payroll	Biweekly	Outside Income Source		Outside Income	0.00	CFB Code		Comments		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">(Annual)</div>
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- 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															
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Reason</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Reason</td> <td style="width: 85%;">Equity Adjustment</td> </tr> <tr> <td>Find %</td> <td></td> </tr> <tr> <td>Component Reason</td> <td>Equity Adjustment</td> </tr> <tr> <td>Component Reason</td> <td>Ment Increase</td> </tr> <tr> <td>Component Reason</td> <td>Transfer Adjustment</td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Change Value</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Change %</div>	Reason	Equity Adjustment	Find %		Component Reason	Equity Adjustment	Component Reason	Ment Increase	Component Reason	Transfer Adjustment	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Change value = Difference in rate of pay.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Proposed</div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Change Value</td> <td style="width: 85%;"></td> </tr> <tr> <td>Change %</td> <td></td> </tr> </table>	Change Value		Change %	
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Change Value															
Change %															

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4. 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
<input style="width: 15px; height: 15px; border: 1px solid black; vertical-align: middle;"/> <small>Use the down arrow to create multiple records.</small>			
<small>Change value = Difference in rate of pay.</small>			

5. If the **FTE** is changing, enter the **full-time equivalency** for the employee in the **FTE** field.
6. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form; click on the **SAVE** button.
7. 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 **ACT MAIN FORM**.

Projected Assignment Salary		Element Name	Costing						
Assignment		Element							
Current	Effective Date								
LD	Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Or %	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-OCT-2009		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"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<small>Comments:</small>									
<small>Total LD % 100.00</small>									
<input style="width: 150px; height: 20px; border: 1px solid black; vertical-align: middle;"/> <input style="width: 150px; height: 20px; border: 1px solid black; vertical-align: middle;"/>									

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.*

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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**.

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The screenshot shows a software interface titled 'Costing'. At the top, there are fields for 'Projected Assignment Salary' and 'Element Name'. Below this is a grid table with columns: Assignment, Element, Current, Effective Date, LD, Stop, From Date, To Date, GL Code, Project, Task, Award, Exp Or, and %. The grid contains several rows of data, with the first row showing '11-OCT-2009' and '2101408.000.124600000.46920000' in the GL Code field. At the bottom of the grid, there is a 'Comments:' text area and a 'Total LD %' field set to '100.00'. At the bottom right of the window are buttons for 'Return to Previous Form' and 'Save'.

- 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**.

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