

Appoint, Change and Terminate (ACT) Documentation Recurring (Element) Document

On the **HR Officer** responsibility, **Recurring (Element) ACT Documents** enable departments to cost or distribute funding for **future Average Flat Rate (AFR)** charges on **Post Doc Trainee's (20)**.

Processing a **Recurring (Element) ACT** document eliminates the need to reallocate AFR charges via the Salary Reclass Form.

Below are step by steps instructions on how to create a **Recurring Element ACT Document**.

Note: When processing a **Recurring (Element) ACT** document for **Payroll Deduction** purposes, please contact Instructeam@uab.edu for step by step instructions.

UAB HR Officer → HR Transactions → ACT → Find Window

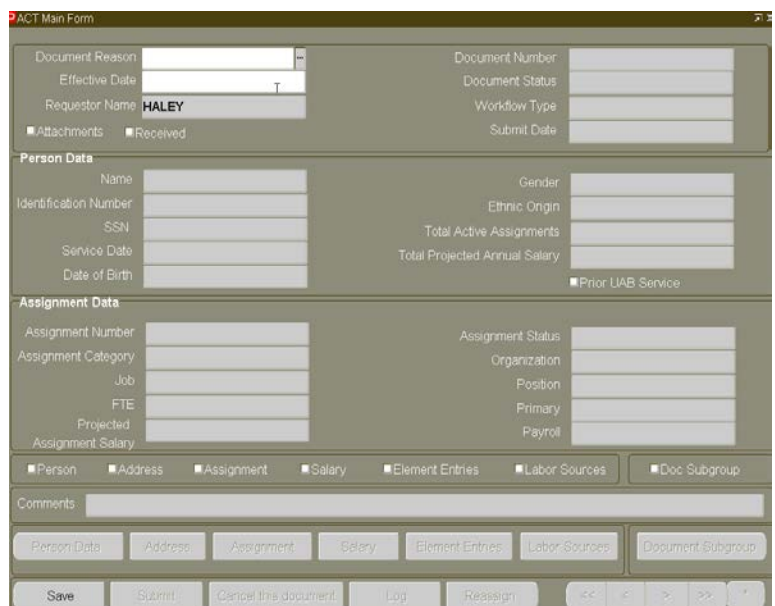
1. Use the **FIND WINDOW** to locate the employee.



2. Click on the **CREATE NEW DOCUMENT** button.

Note: The **EMPLOYEE ASSIGNMENT** window displays when an individual has multiple active assignments. Verify the correct assignment is highlighted before clicking on **OK**.

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 **RECURRING**.

ACT Main Form

Document Reason: RECURRING

Effective Date: 01-MAR-2010

Requestor Name: HALEY

Attachments Received

5. Once inside the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or *type in the desired date*. Remember to use the **DD-MMM-YYYY**.

Note: *The EFFECTIVE DATE of the document must be the beginning of the current pay period or future pay period in which AFR (Average Flat Rate) is to be costed differently than the trainee's assignment level funding.*

6. Click the **Save** button at the bottom of the form. The system will assign a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** will be **OPEN**.

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 << < > >> *

7. Click on the **ELEMENT ENTRIES** button. The **ELEMENT ENTRY** form will open.

The Element Entry form will open and will resemble the illustration to the right.

Note: The **AFR** element automatically populates on the Postdoc Trainee (20) assignment category. By default, the **AFR** element is costed according to the trainee's assignment level funding. In order to cost or redistribute future AFR charges, the default AFR element must be "**Stopped**" and new costing instructions entered.

Element Entry

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Average Flat Rate	01-SEP-2008		<input checked="" 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"/>				<input type="checkbox"/>

Comments

Note: Exiting the Entry Values form automatically saves changes made on that form

Entry Values Labor Sources Return to Previous Form Save

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8. Click the **STOP** check box; a checkmark will appear.

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Average Flat Rate	01-SEP-2008		<input checked="" 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"/>				<input type="checkbox"/>

9. Click in the next available row; click on the **LOV** in the **ELEMENT NAME** field, the **AVERAGE FLAT RATE** element populates along with the document effective date displaying in the **EFFECTIVE START DATE** field.

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Average Flat Rate	01-SEP-2008		<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Average Flat Rate	01-MAR-2010		<input checked="" 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"/>

10. Click in the **EFFECTIVE END DATE** field; enter appropriate end date.

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Average Flat Rate	01-SEP-2008		<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Average Flat Rate	01-MAR-2010	31-DEC-2011	<input checked="" 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"/>

11. Click on the **SAVE** button located at the bottom of the **ELEMENT ENTRY** form.

12. Click on the **ENTRY VALUES** button.
The **ENTRY VALUES** form will display; the selected **AFR ELEMENT** will display at the top of the form.

13. Enter the correct **AFR** amount in the **FUTURE 1** field.

14. Click the **X** in the upper right corner of the window to save and close the form.

15. Insert comments in the **COMMENTS** box on the **ELEMENT ENTRY** form, if applicable. Click on the **SAVE** button at the bottom of the **ELEMENT ENTRY** form.

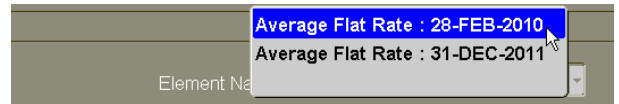
16. Click on the **LABOR SOURCES** button on the **ELEMENT ENTRY** form to enter new costing instructions.

Entry Values (Average Flat Rate)	
Future 1	286.50
Future 2	
Further Entry Information	
Date Earned	
Payee Details	
Processing Priority	260

Note: Exiting this screen automatically saves changes made here.

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17. Click on the **drop down arrow** located in the **ELEMENT NAME** box and select the **AVERAGE FLAT RATE** with the appropriate end date.



18. Click in the first available line under the **COSTING** section and proceed with entering applicable costing information.

A screenshot of the 'Costing' section in a software application. At the top, 'Projected Assignment Salary' is 42,204.00 and 'Element Name' is 'Average Flat Rate : 28-FEB-...'. Below this is a table with columns: Stop, From Date, To Date, GL Code, Project, Task, Award, Exp. Or, and %. The first row has '01-SEP-2008' in the 'From Date' column and '28-FEB-2010' in the 'To Date' column. At the bottom right, 'Total LD %' is .00.

Stop	From Date	To Date	GL Code	Project	Task	Award	Exp. Or	%
<input type="checkbox"/>	01-SEP-2008	28-FEB-2010						
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

19. If AFR is to be charged to a GL account, click in the **GL CODE** field.
20. Click on the **LOV**. This opens the **UAB_AKF FIND WINDOW**. Enter **the seven digit account number (ALIAS)** or use the **LOV** to perform a search

A screenshot of a window titled 'UAB_AKF'. It contains a text field labeled 'ALIAS' with the value '3101699'. Below the field is a scrollbar. At the bottom right are buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

21. Once the **ALIAS** is entered, click on the **OK** button. The **UAB_AKF** window will open displaying the account string.

A screenshot of the 'UAB_AKF' window showing account details. The fields are: ACCOUNT (3101699) HSF-PATHOLOGY, SUBACCOUNT (000) DEFAULT SUBACCOUNT, BALANCING (213101699) HSF-PATHOLOGY, ORGANIZATION (392300000) PATHOLOGY CHAIR OFFICE, FUTURE (0000) DEFAULT, and OBJECT (empty). At the bottom are buttons for 'OK', 'Cancel', 'Combinations', 'Clear', and 'Help'.

22. Type **"0" zero** in the **OBJECT** field. Click **OK**.

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- The **LABOR SOURCES** form displays the account string information in the **GL CODE** field.
- Type the **percentage of the element to be charged to this account** in the % field. Only one funding source is allowed for each record/row.

Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Orig	%
<input type="checkbox"/>	01-SEP-2008	28-FEB-2010	3101699.000.213101699.392300000					100.00
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

Repeat the above steps, as needed, for entering all GL account funding sources.

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

- Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.
- Click in the **ATTACHMENTS** check box **if** attachments will be sent to Central HR or Payroll Services.

Document Reason	RECURRING	Document Number	462404
Effective Date	01-MAR-2010	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	ELEMENTS
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

- Click on the **SUBMIT** button.
- The **DOCUMENT STATUS** will change to **READY**; the document will enter the Workflow Approval path.

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