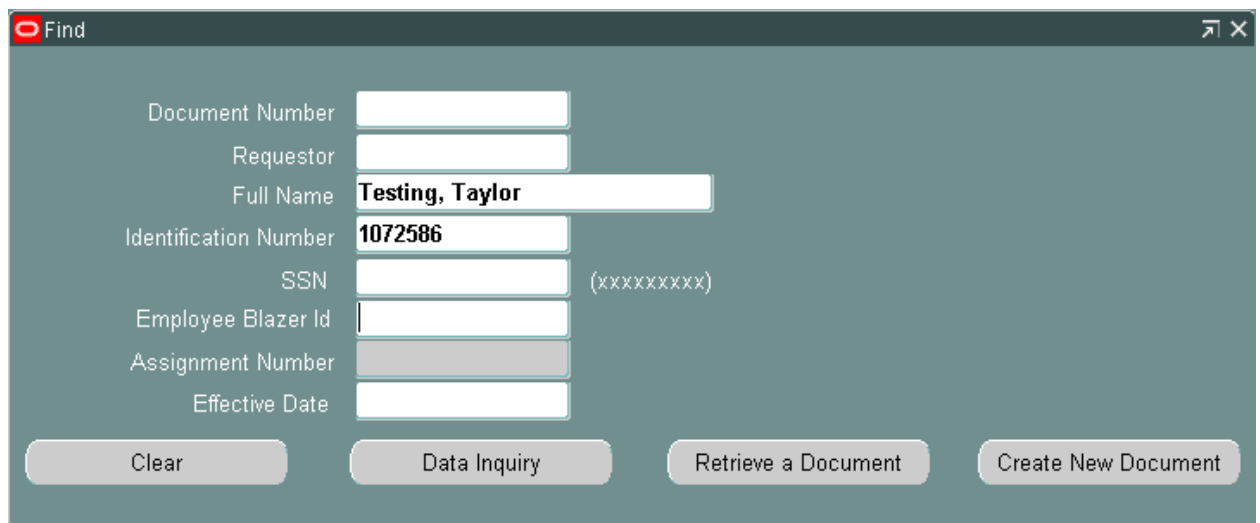


**Appoint, Change and Terminate (ACT) Documentation
Nonrecurring Element Document
(EPP – Program Lump Sum Payment)**

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 that the correct assignment is displayed before clicking on OK.*

3. The **ACT MAIN FORM** opens; click once in the **DOCUMENT REASON** field. Use the **DOCUMENT REASON LOV** to choose **NONRECURRING ELEMENT**.
4. 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** when processing **Exceptional Performance Payments (EPP)** for monthly paid employees should be **October 1, 2014** and **September 21, 2014** for biweekly paid employees.*



Appoint, Change and Terminate (ACT) Documentation Nonrecurring Element Document (EPP)

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

Document Reason: **NONRECURRING ELEMENT** Document Number: **804614**
 Effective Date: **01-AUG-2014** Document Status: **OPEN**
 Requestor Name: **ALHOWARD** Workflow Type: **ELEMENTS**
 Attachments Received Submit Date: _____

- Click on the **ELEMENT ENTRIES** button.

Person Data Address Assignment Salary **Element Entries** Labor Sourc... Document Subgroup

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

- The **ELEMENT ENTRY** form will open. Click on the **LOV** located in the **ELEMENT NAME (yellow)** field; select the appropriate **ELEMENT NAME** to be paid (see sample listing below), for detailed descriptions of UAB pay elements, [click here](#).

Element Entry
 Costed Stop Element Name Effective Start Date Effective End Date Recurring

Comments: _____

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

Entry Values Labor Sources Return to Previous Form Save

Notes:

- ❖ **Nonrecurring Element payments are subject to employee tax withholdings and Teachers Retirement withholdings.**
- ❖ **Nonrecurring Element payments are subject to CFB rates.**
- ❖ **Nonrecurring Element payments are effort reportable when a “work” element is selected and the element is “costed” to a grant (PTAOE) account string.**

Element Name	Processing Type	Description
Active Military	N	B-Active Military
Additional Duties	N	Additional Duties
Allowance Program	N	Car and Clothing Allowance
Cred Course Inst	N	Credit Course Instruction
Cred Course Inst 1	N	Credit Course Instruction
Cred Course Inst 2	N	Credit Course Instruction
Cred Course Inst 3	N	Credit Course Instruction
Cred Course Inst 4	N	Credit Course Instruction
EPP Program	N	Exceptional Performance Payment
Faculty Overload	N	Faculty Course Overload
Fixed Increment Pay	N	Fixed Increment Pay
Grad HC Gross	N	Semester Healthcare gross paym
Grandparented	N	Grandparented
Grandparented (2)	N	Grandparented element to be use
Housing Allowance	N	Housing Allowance for the Clergy
Incentive Pay	N	Incentive Pay Monthly
Incenctng Sep Pay	N	Incentive Separate Payment
Int Fac Consult	N	Used for approved Faculty Interna
Moonlighting Monthly	N	Moonlighting Monthly
NEO Monthly	N	Payroll cannot be Trainee nor b/w
NRA Ind Contractor	N	NRA Independent Contractor
Non-Acct Moving	N	Moving Allowance
Non-Acct Travel	N	Non accountable travel - Not allow
OTP	N	Overtime premium due with a pla
On Call Amount-Wk1	N	On Call - Total Amount Other than
On Call Hours-Wk1	N	On Call - Hourly Rate
Pers Holiday-Wk1	N	Personal Holiday
Professional Related Earnings	N	Only if Job Title is QHAP.Dentist...
Retention Sec Pay	N	Retention separate for Regular P

Appoint, Change and Terminate (ACT) Documentation Nonrecurring Element Document (EPP)

- Once the correct **ELEMENT NAME** is selected, click the **OK** button at the bottom of the **ELEMENT** listing.

The **ELEMENT NAME** field, **EFFECTIVE START DATE** and **EFFECTIVE END DATE** fields will populate.

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	EPP Program	01-AUG-2014	31-AUG-2014	<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"/>				<input type="checkbox"/>

Note: The **EFFECTIVE START DATE** will automatically populate with the **DOCUMENT EFFECTIVE DATE**. The **EFFECTIVE END DATE** will be the end of the pay period in which the element is to be paid; the system will automatically enter this date.

Once the **ELEMENT NAME(s)** to be paid have been entered with the correct **EFFECTIVE START DATES**, details pertaining to the payment **must** be entered in the **COMMENTS** section. **Comments should explain the purpose of the payment.**

- Click in the **COMMENTS** field and enter a detailed explanation or purpose of payment(s).

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	EPP Program	01-AUG-2014	31-AUG-2014	<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"/>

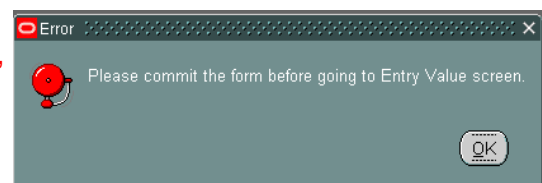
Comments

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

- Highlight the first element in the **ELEMENT NAME** field.

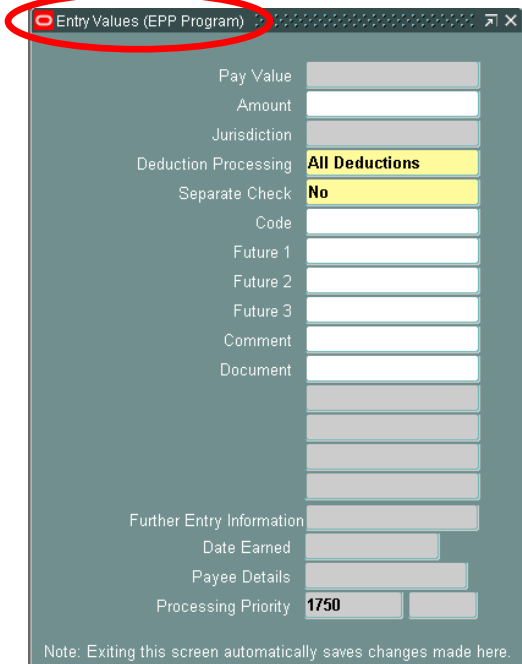
- Click on the Entry Values button.

Note: If you receive the error displayed on the right, click **OK** to return to the **ELEMENT ENTRY** form and click on the **SAVE** button.



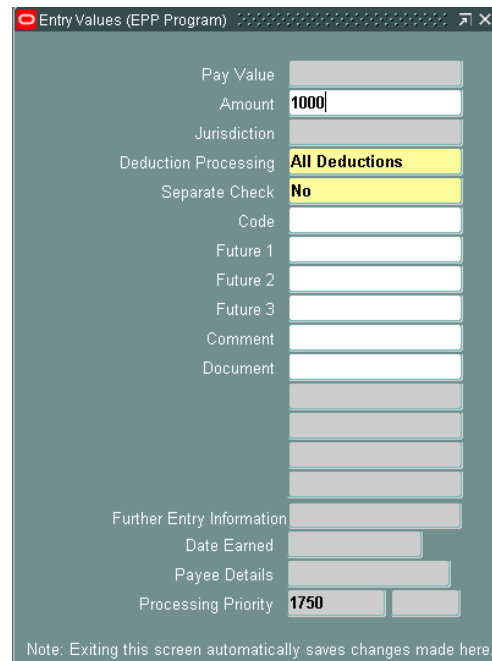
Appoint, Change and Terminate (ACT) Documentation Nonrecurring Element Document (EPP)

The **ENTRY VALUES** form will display; the selected **ELEMENT NAME** will display at the top of the form.



The **ENTRY VALUES** form will change based on the element selected. The element selected will determine whether you enter the number of hours to be paid or a specific monetary amount.

13. Enter the **monetary amount**.



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

Note: When paying multiple elements on the same document, an **ENTRY VALUES** form must be completed for each **ELEMENT NAME**.

Appoint, Change and Terminate (ACT) Documentation Nonrecurring Element Document (EPP)

15. Click the **SAVE** button at the bottom of the **ELEMENT ENTRY** form.

Note: *Payments to an employee via a Nonrecurring Element ACT document will default to the employee's assignment level funding. The element must be "costed" if the element is to be paid from a funding source different than the employee's assignment level funding. For instructions on "Costing" a nonrecurring element payment, [click here](#).*

16. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

17. Click in the **ATTACHMENTS** check box *if* attachments will be sent to Central HR or Payroll Services.



The screenshot shows a web form with the following fields and values:

Document Reason	NONRECURRING ELEMENT	Document Number	804614
Effective Date	01-AUG-2014	Document Status	OPEN
Requestor Name	ALHOWARD	Workflow Type	ELEMENTS
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

A red arrow points to the "Attachments" checkbox.

18. Click on the **SUBMIT** button.

19. The **DOCUMENT STATUS** will change to **READY**; the document will enter the Workflow Approval path.

[Return to Top](#)

Costing a Nonrecurring Element Payment (EPP)

1. From the **ACT MAIN FORM** or the **ELEMENT ENTRIES** form, click on the **LABOR SOURCES** button.

Person Data | Address | Assignment | Salary | Element Entries | **Labor Sourc...** | Document Subgroup

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

Full Name: **Testing, Taylor** | Document Reason: **NONRECURRING ELEMENT**
Identification Number: **1072586** | Document Number: **804614**
Assignment Number: **1072586** | Document Status: **OPEN**
Effective Date: **01-AUG-2014**

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	EPP Program	01-AUG-2014	31-AUG-2014	<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: **Testing EPP**

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

Entry Values | **Labor Sources** | Return to Previous Form | Save

2. The **LABOR SOURCES** form opens.

Projected Assignment Salary: **66,000.00** | Element Name: []

Assignment | **Element**

Current	LD	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014			2101138.000.110100000.114001000					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"/>									

Comments: [] | Total LD %: **100.00**

Return to Previous Form | Save

3. Click on the **drop down arrow** in the **ELEMENT NAME** box.

Costing Nonrecurring Element Payments (EPP)

4. A listing of **ELEMENT NAMES** entered will display.

Projected Assignment Salary: 66,000.00
Element Name: EPP Program : 31-AUG-2014

Costing

Assignment		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current LD	Stop	From Date	To Date						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014		2101138.000.110100000.114001000					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"/>								

Comments: Total LD % 100.00

Note: *Costing an element changes the labor source account(s) on the selected element only. Each element must be costed separately. If you chose not to cost an element, the payment will default to the employee's assignment level funding.*

5. Select the **element and period** to be costed. The **COSTING** fields will open; the **element name and period** will display in the **ELEMENT NAME** field.

Projected Assignment Salary: 66,000.00
Element Name: EPP Program : 31-AUG-2014

Costing

Assignment | Element

		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Stop		From Date	To Date						
<input type="checkbox"/>		01-AUG-2014	31-AUG-2014						
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									

Comments: Total LD % .00

6. If the element is to be paid from a GL account; click in the **GL CODE** field.
7. Click on the **LOV**. This opens the **UAB_AKF FIND WINDOW**.

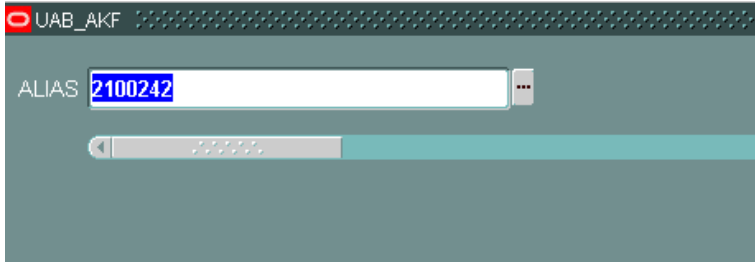
UAB_AKF

ALIAS:

OK Cancel Clear Help

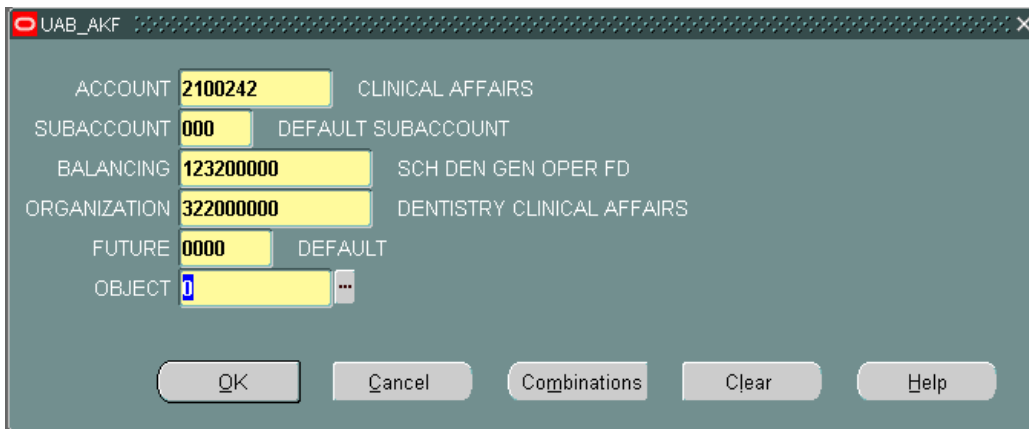
Costing Nonrecurring Element Payments (EPP)

8. Enter **the seven digit account number (ALIAS)** or use the **LOV** to perform a search. Enter as much information as possible to limit your search.



The screenshot shows a window titled "UAB_AKF". Inside, there is a field labeled "ALIAS" containing the text "2100242". Below the field is a horizontal scrollbar.

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

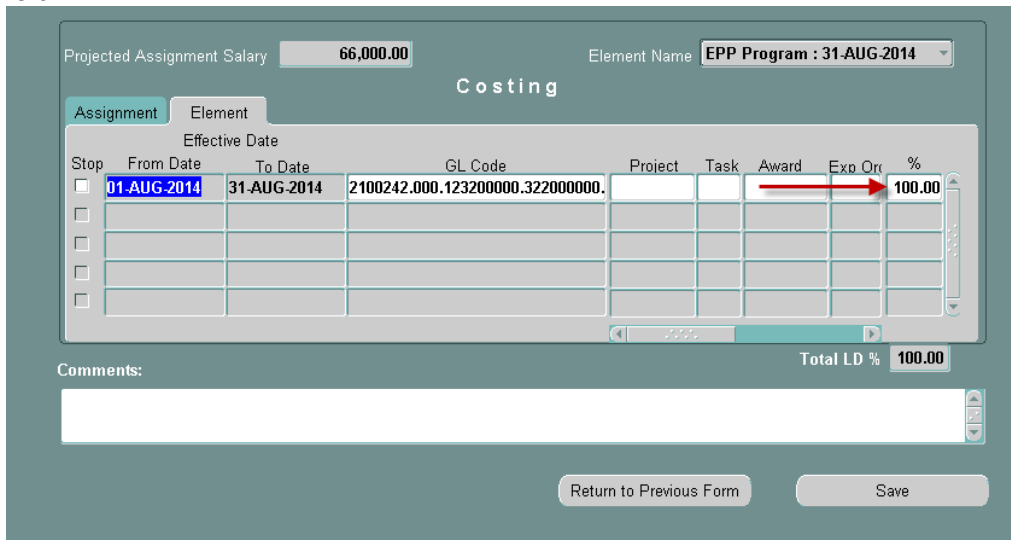


The screenshot shows the "UAB_AKF" window with the following fields and values:

ACCOUNT	2100242	CLINICAL AFFAIRS
SUBACCOUNT	000	DEFAULT SUBACCOUNT
BALANCING	123200000	SCH DEN GEN OPER FD
ORGANIZATION	322000000	DENTISTRY CLINICAL AFFAIRS
FUTURE	0000	DEFAULT
OBJECT	0	

Buttons at the bottom: OK, Cancel, Combinations, Clear, Help.

10. Type **"0" zero** in the **OBJECT** field. Click **OK**.
11. The **LABOR SOURCES** form displays the account string information in the **GL CODE** field.



The screenshot shows the "LABOR SOURCES" form. At the top, "Projected Assignment Salary" is 66,000.00 and "Element Name" is "EPP Program : 31-AUG-2014". The "Costing" section has a table with the following data:

Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Ort	%
<input type="checkbox"/>	01-AUG-2014	31-AUG-2014	2100242.000.123200000.322000000.					100.00
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

At the bottom right, "Total LD %" is 100.00. Buttons at the bottom: Return to Previous Form, Save.

12. Type in the **percent of the element to be charged to this account** in the **%** field. Only one funding source is allowed for each record/row.

Costing Nonrecurring Element Payments (EPP)

13. If the element is to be paid from multiple accounts; click in the next available line and repeat Steps 6 – 12 for GL accounts or Steps 15 and 16 for Grant accounts.

The screenshot shows the 'Costing' window with a table of assignments. The 'Projected Assignment Salary' is 58,032.00. The table has columns for Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. Two rows are populated with GL codes and a 50.00 percentage each. The total LD% is 100.00.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014	2100242.000.123200000.322000000					50.00
<input type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014	2100240.000.123200000.329700000					50.00
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Total LD % 100.00

Note: The **TOTAL LD%** must equal **100%** for each element costed.

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

Entering Grant Funding Sources

15. If the element is to be charged to a grant, click once in the **PROJECT** field.

The screenshot shows the 'Costing' window with a table of assignments. A red arrow points to the 'Project' field in the first row. The 'Effective Date' is 01-AUG-2014 to 31-DEC-2014. The total LD% is 100.00.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014 31-DEC-2014						
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Total LD % 100.00

- Choose the **project number** from the LOV in the **PROJECT** field or **type the grant number in the field.**
- Choose the **task number** from the LOV in the **Task** field or **type the number into the field.**
- Choose the **award number** from the LOV in the **AWARD** field or **type the number into the field.**
- Choose the **organization number** from the LOV in the **EXPENDITURE ORGANIZATION** field or type **the number into the field.** For the hospital, this number is **70**. For the university, the number is **10**.

Costing Nonrecurring Element Payments (EPP)

16. Type in **the percent of the employee's effort to be charged to this account** in the % field. Only one funding source is allowed for each record/row.

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014	31-DEC-2014		226189	06.01	1526189	10	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"/>								

Comments: Total LD % 100.00

Note: The **TOTAL LD%** must equal **100%** for each element costed.

If the element is to be paid from multiple funding sources, click in the next available line and repeat Steps 6 – 12 for GL accounts or Steps 15 and 16 for Grant accounts.

17. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.
18. Click on the **RETURN TO PREVIOUS FORM** button at the bottom of the **ELEMENT ENTRY** form to return to the **ACT MAIN FORM**. [Click here](#) to proceed with submitting the Nonrecurring Element ACT document.