ACT Document Types and Reasons

Budget	Change	Costing Change	Data Change	Elements	Hire	Leaves	Termination
Budget	Change of Assignment Category	Funding Source Change	Data Change	Nonrecurring Element	Additional Assignment	Education with & without Pay	End a Trainee
	End Assignment			**Recurring Element	Create Volunteer	FMLA with & without Pay	End a Volunteer
	Equity Increase			**Refund	New Hire	Medical Leave with & without Pay	Terminate Employee
	Merit Increase				New Trainee Award	Military Leave with & without Pay	
	Probationary Increase				Rehire	OJI Leave with & without Pay	
	Promotion Same Department					OJI Family Medical Leave	
	Reclassification					Personal Leave with & without Pay	
	Salary Schedule Adjustment					Return from Leave	
	Transfer Lateral/Different Department					Sabbatical Full Pay	
	Transfer Lateral/Same Department					Sabbatical Half Pay	
	Transfer with Promotion						

*Not available to all Requestors

Please direct salary related questions to the HRM Compensation Division at 4-5264.

Document Reason	Definition	Uses
Additional Assignment	Used when an existing UAB employee is given an assignment in addition to their regular duties. **The 99 Supplemental assignment category may not be used for these assignments.**	If you are attempting to create an additional assignment for an employee from another organization, you must first contact a Requestor in the primary organization for the employee to create the document for you and reassign it to you. Make sure that you give the Requestor your name and organization as it is listed in Oracle. Once you receive the document then you can complete the information for the additional assignment. The Document Effective Date for all bi-weekly paid employees receiving an Additional Assignment 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
Budget	Used when a change in salary occurs at the beginning of the Fiscal Year – October 1.	Used to make changes on the following forms: salary and/or labor sources. Use the labor sources form if there is a change in the funding source.
Change of Assignment Category	Used when an employee is staying in the same position, with the same title where the salary may or may not change	Examples: An employee going from an 03 to an 04 assignment category, an employee going from an 01 to an 04 or 03 assignment category, or an employee going from an 03 to an 01 as long as the position has been recruited. (Currently on issue log to open for position and job)
Create Volunteer	Used when an individual is strictly a volunteer.	Typically used for retirees, consultants and other types of volunteers.
Data Change	Used to update or correct personal employee information	Use to make changes in the following: name, address, phone, schools and colleges, location of assignment, timecard distribution number, timekeeping method, timekeeping organization, and/or changes in FTE within the same assignment category. **Note: Can not be done with a retroactive effective date**.
End Assignment	Used to end an additional assignment held by an employee	When an employee has an additional assignment with your organization and you wish to end that assignment. Some employees may have more than one assignment. Make sure you choose the correct assignment. May **not** be used to end the primary assignment. To end the primary assignment, use Terminate Employee as the document reason.

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Document Reason	Definition	Uses
End a Trainee	Used to end a trainee appointment	This document reason will terminate **ALL** assignments held by a trainee.
End a Volunteer	Used to end a volunteer assignment	This document reason will terminate the volunteer from the system.
Equity Increase	Compensation has determined a salary inequity exists and approves action to correct the inequity. Requires supporting documentation from Compensation. An equity increase usually requires changing the salary information only. However, the Labor Sources and Element Entries forms will also be open in case the funds will be coming from another source.	The Document Effective Date for all bi-weekly paid employees receiving an Equity Adjustment 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.
Funding Source Change	Used when the account or accounts that the employee is being paid from changes.	Use the Labor Sources form to make the funding source change(s).
Merit Increase	Used when an employee receives an increase based upon performance or achievement at a time period other than Oct 1 of the fiscal year. A Merit Increase usually requires changing the salary information only. However, the Labor Sources and Element Entries forms will also be open in case the funds will be coming from another source.	The Document Effective Date for all bi-weekly paid employees receiving a Merit Increase 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.
New Hire	Used when the individual has never been employed at UAB or they were previously employed, but terminated prior to January 1, 2003 (no information in Oracle).	Also used for **One Time Requisition Pay.** One-time payments are requested for individuals that have been determined to have an employee/employer relationship with UAB. This requires completing a new a hire document and completing the required supporting attachments. The payment will be processed using a nonrecurring element on the Hire document. The element selected should best describe the activity the individual is performing or reason for issue of pay.
New Trainee Award	Primarily used for post doctoral training award, undergraduate or graduate trainees.	Assignment categories are 20 – Post Doctoral Trainee and 06 Student

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Nonrecurring Element	A lump sum payment to employees in addition to regular base pay. Examples are faculty summer pay, payment for credit course instruction, bonus or incentive payments, FIPs, retention pay, referral pay, relocation reimbursements. Use the element entry screen to select the element for pay. Use the entry values screen to enter the amount of the payment.	The Effective Date of the document should be the first day of the session that is being taught for credit course instruction. The effective date of the elements should be within the month of requested payment. If costing is not to the assignment funding sources, the costing information can be entered for each payment. For more information, see the UAB Payroll web site.
Probationary Increase	Can be given to employees within the University at the discretion of the department according to departmental policy, after the employee's first 6 months of employment with the University. A Probationary Increase usually requires changing the salary information only. However, the Labor Sources and Element Entries forms will also be open in case the funds will be coming from another source.	The Document Effective Date for all bi-weekly paid employees receiving a Probationary Increase must be the beginning of a pay period. 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.
Promotion Same Department	Used when an employee changes to a job classification that is a higher pay grade than their current job classification within the same department. Allows for changes in the following forms: person, schools & colleges, assignment, salary, labor sources.	The Document Effective Date for all bi-weekly paid employees receiving a Promotion in the 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.

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Document Reason	Definition	Uses
Reclassification	Requires supporting documentation of approval from Compensation. Used when employee will maintain the same job number with a different job classification within the same department.	May or may not involve a salary change.
Rehire	Used when an employee was hired after January 1, 2004 and termed in Oracle. Also used when the individual was terminated prior to the Oracle implementation (information is in Oracle) and is being rehired in the system.	Individuals who were hired after January 1, 2004 should have the employee data in Oracle.
Salary Schedule Adjustment	Primarily used when Faculty have a fluctuation either up or down (increase or decrease) in salary. Can also be used for, changes in rates for Graduate Assistant and Post Docs/Residents. **Cannot** be used for staff positions within the University or Hospital.	Examples are increases in rate for Graduate Assistants, Post Doc/Residents going from PGY2 to PGY3, employees who receive income from outside sources and will be receiving salary adjustments in either state funding and/or outside sources. **Note: If changing assignment related data, use either Promotion Same Department, Transfer Lateral/Same Department or Transfer with Promotion.**
Terminate Employee	Used to terminate employee from the University	This document reason will terminate **ALL** assignments held by the employee.

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Document Reason	Definition	Uses
Transfer Lateral/Different Department	Used when an employee is transferring to another organization. May or may not involve a change in salary. **NEW:** 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.	The Document Effective Date for all bi-weekly paid employees receiving a Lateral Transfer in a Different 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. The employee's current organization creates the document and reassigns it to the new organization's 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.
Transfer Lateral/Same Department	Used when an employee is transferring within the same organization. May or may not involve a change in salary. **NEW:** 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.	The Document Effective Date for all bi-weekly paid employees receiving a Lateral Transfer in the 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.
Transfer with Promotion	Used when an employee is transferring to another organization to a job classification that is a higher pay grade than their current job classification. May or may not include an increase in salary.	The employee's current organization creates the document and reassigns it to the new organization's 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.

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