

## **Appoint, Change and Terminate (ACT) Documentation Additional Assignment**

The **ADDITIONAL ASSIGNMENT** ACT document is used when an existing UAB employee or trainee is given an assignment in addition to their regular primary assignment duties.

**Primary Organization** -- Every UAB employee is affiliated with a **primary organization** which is the organization responsible for the employee's primary assignment. If an additional assignment is approved for an employee, the secondary organization must contact the primary organization and request an **ADDITIONAL ASSIGNMENT** document be created for the employee. The primary organization's HR Officer must be given the name of the person to whom the document is to be reassigned to, and the effective date of the document.

**Secondary Organization** -- The **secondary organization** is the organization that will be responsible for the secondary assignment and for payment of the secondary assignment. Once the **ADDITIONAL ASSIGNMENT** ACT document is created by the primary organization and reassigned, the secondary organization must complete the document and submit for approval.

Approval notifications will be delivered to all level one approvers on the secondary organization workflow approval path. A 24-hour hold notification will be delivered to the ***notify person*** for the primary organization.

Instructions for completing each form on the **ADDITIONAL ASSIGNMENT** ACT document can be accessed by clicking on each section heading below, or by scrolling to the referenced page number.

**Creating an Additional Assignment (Primary Organization)**

**Creating an Additional Assignment (Secondary Organization)**

**Entering Person Data Information**

**Entering Address and Phone Information**

**Entering Assignment Information**

**Entering Salary Information**

**Entering Element Entries**

**Entering Labor Source Information**

**Entering General Ledger (GL) Information**

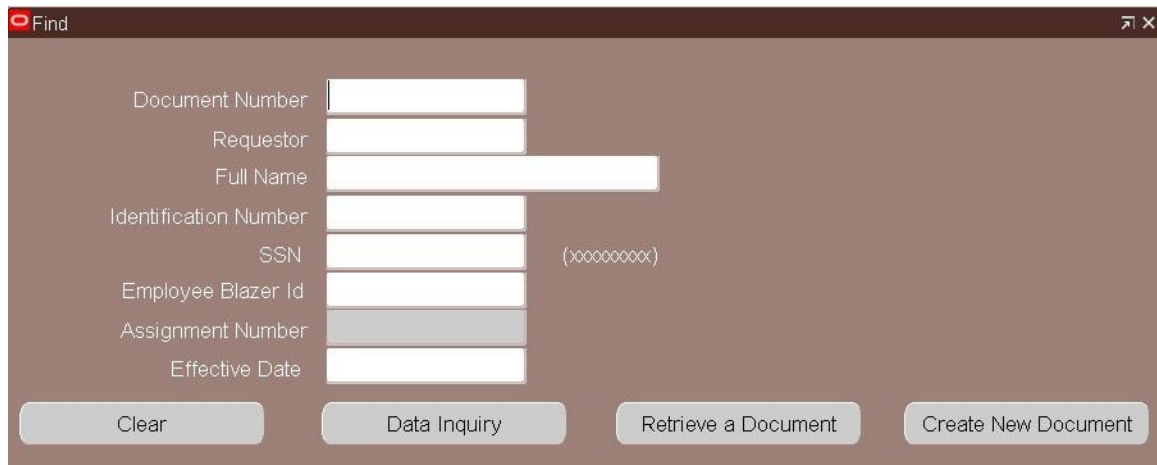
**Entering Grant (GA) Funding Sources**

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

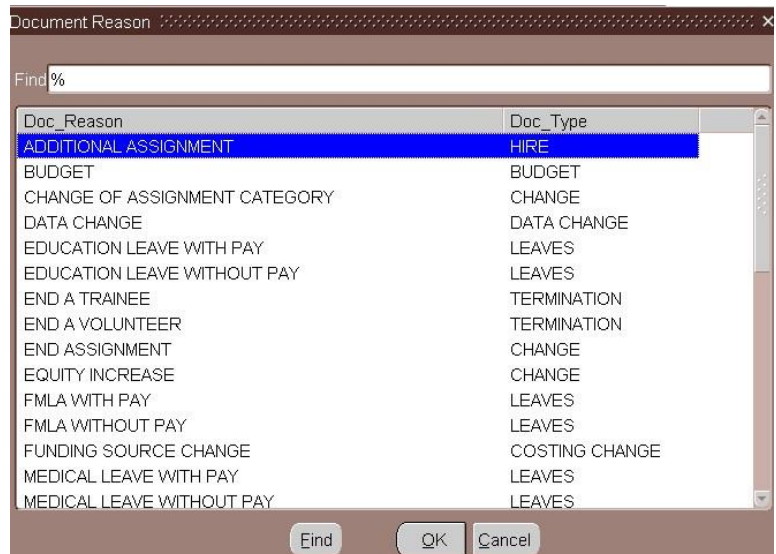
### Creating an Additional Assignment (Primary Organization)

UAB HR Officer → HR Transactions → ACT → Find Window

1. Selecting **ACT** opens the **ACT FIND** window.



2. Use the **FIND** window to locate the employee in which you are creating and **ADDITIONAL ASSIGNMENT** document. A blank **ACT MAIN FORM** will display.
3. Click on the **DOCUMENT REASON** field LOV. Select **ADDITIONAL ASSIGNMENT**, click **OK**.



Doc_Reason	Doc_Type
ADDITIONAL ASSIGNMENT	HIRE
BUDGET	BUDGET
CHANGE OF ASSIGNMENT CATEGORY	CHANGE
DATA CHANGE	DATA CHANGE
EDUCATION LEAVE WITH PAY	LEAVES
EDUCATION LEAVE WITHOUT PAY	LEAVES
END A TRAINEE	TERMINATION
END A VOLUNTEER	TERMINATION
END ASSIGNMENT	CHANGE
EQUITY INCREASE	CHANGE
FMLA WITH PAY	LEAVES
FMLA WITHOUT PAY	LEAVES
FUNDING SOURCE CHANGE	COSTING CHANGE
MEDICAL LEAVE WITH PAY	LEAVES
MEDICAL LEAVE WITHOUT PAY	LEAVES

4. Enter the **effective date of the document** in the **EFFECTIVE DATE** field. Use the Calendar LOV or **type in the desired date**. Remember to use the **dd-mm-yyy** format.

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

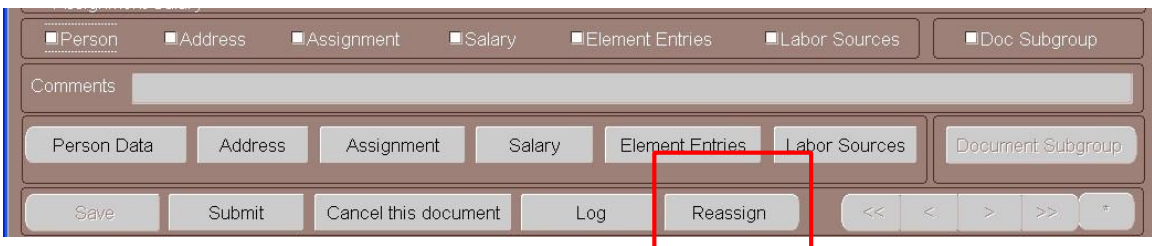
Note: The **Document Effective Date** for all bi-weekly paid employees receiving an Additional Assignment must be a Sunday. If the Labor Source(s) are changing, the **Document Effective Date** must be a future date that is beyond the current pay period for biweekly paid employees.

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



The screenshot shows the 'ACT Main Form' window. It contains several fields: Document Reason (ADDITIONAL ASSIGNMENT), Document Number (536195), Effective Date (01-MAY-2011), Document Status (OPEN), Requestor Name (HALEY), and Workflow Type (HIRE). There are also checkboxes for Attachments and Received, and a Submit Date field.

- Click on the **REASSIGN** button at the bottom of the **ACT MAIN FORM**.

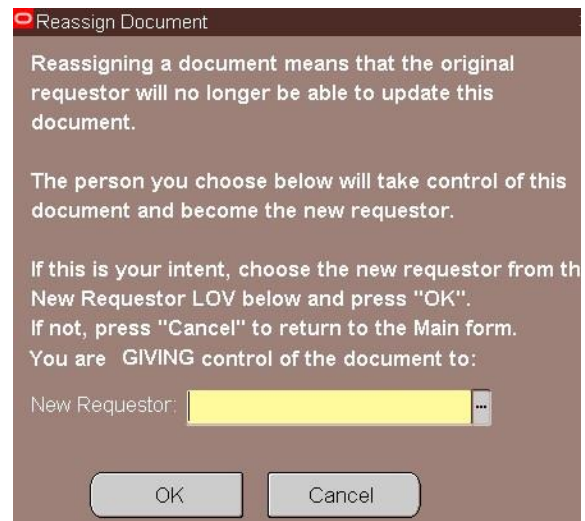


The screenshot shows the bottom section of the ACT Main Form. It includes a row of tabs: Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below the tabs are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows. The Reassign button is highlighted with a red box.

- A message box like the one shown should appear. →

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

- After locating the Requestor, click **OK**.



The screenshot shows the 'Reassign Document' dialog box. It contains the following text: 'Reassigning a document means that the original requestor will no longer be able to update this document.' 'The person you choose below will take control of this document and become the new requestor.' 'If this is your intent, choose the new requestor from the New Requestor LOV below and press "OK". If not, press "Cancel" to return to the Main form. You are GIVING control of the document to:'. Below the text is a 'New Requestor:' field with a yellow highlight and a dropdown arrow. At the bottom are 'OK' and 'Cancel' buttons.

- From the **ACT MAIN FORM**, view the **REQUESTOR NAME** field information located at the top of the form. The field should display the new Requestor name.

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ACT Main Form

Document Reason	ADDITIONAL ASSIGNMENT	Document Number	536195
Effective Date	01-MAY-2011	Document Status	OPEN
Requestor Name	PEBBLES	Workflow Type	HIRE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Notify the new Requestor that you have reassigned the document and give them the document number so that the document can be quickly found.

The **Primary Organization's** portion of the **ADDITIONAL ASSIGNMENT** document is **COMPLETE**.

**Note:** *The original requestor will not have access to the document once it has been reassigned to the new requestor.*

### Creating an Additional Assignment (Secondary Organization)

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

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1. Enter **the document number of the Additional Assignment document** reassigned to you by the Primary Organization in the **DOCUMENT NUMBER** field.

Find

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	<input type="text"/>
Identification Number	<input type="text"/>
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

Clear    Data Inquiry    Retrieve a Document    Create New Document

2. Click on the **RETRIEVE A DOCUMENT** button. The **ACT MAIN FORM** with the employee's information will display.

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

The screenshot shows the 'ACT Main Form' with the following sections:

- Document Information:** Document Reason: ADDITIONAL ASSIGNMENT; Effective Date: 01-MAY-2011; Requestor Name: HALEY; Document Number: 536195; Document Status: OPEN; Workflow Type: HIRE; Attachments and Received checkboxes are present.
- Person Data:** Name: Example, Ima Really Goode; Gender: Female; Identification Number: 1057766; Ethnic Origin: Two or More Races; SSN: 789-45-6123; Service Date: 01-APR-2011; Date of Birth: 29-DEC-1982; Total Active Assignments: 1; Total Projected Annual Salary: 60,000.00; Prior UAB Service checkbox is present.
- Assignment Data:** Fields for Assignment Number, Assignment Category, Job, FTE, Projected Assignment Salary (value: .00), Assignment Status, Organization, Position, Primary, and Payroll.
- Navigation and Actions:** Checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. A Comments field is present. A row of buttons includes Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. A bottom row contains Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

3. If the **ADDITIONAL ASSIGNMENT** being set up has a predetermined end date, click on the **PERSON DATA** button at the bottom of the **ACT MAIN FORM**.

### Entering Person Data Information

The only tabs on the **PERSON DATA** form available for entry are the **TERMINATION** tab and the **SCHOOLS AND COLLEGES** tab. The **ADDRESS** button on the **PERSON DATA** form will be available if adding a Campus Secondary or Tertiary address or additional phone information.

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The **PERSON DATA** form opens displaying the **TERMINATION** tab.

1. Click in the **PROPOSED PROJECTED LAST DAY** field to enter a predetermined end date for the assignment. Enter *the projected last day of work* using the **dd-mmm-yyyy** format in the **PROJECTED LAST DAY OF WORK** field.

The screenshot shows the 'PERSON DATA' form with the 'Termination' tab selected. It features two columns: 'Current' and 'Proposed'. The 'Proposed' column has a highlighted 'Projected Last Day' field. Other fields include Actual Date, Leaving Reason, Rehire Recommendation, and Recommendation Reason. A Comments field and buttons for Address, Return to Previous Form, and Save are at the bottom.

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- Click on the **SAVE** button, the **SCHOOLS AND COLLEGES** tab will display.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Miami	820 Doctor of Medicine	07-JUN-1964	HD	Yes	51.12 - Medicin

Comments

Address      Return to Previous Form      Save

- If previous **SCHOOLS AND COLLEGES** information displays and is accurate, click on the **SAVE** button located at the bottom of the form.
- If previous Schools and Colleges information is not accurate, you may:
  - Overwrite the existing information.
  - Enter additional School or College's, Degree Names, Degree Types by choosing the **Country** and then clicking on the next available line.
  - Enter Transcript and Degree Discipline information as required.
- If Schools and Colleges information does not display, proceed to enter applicable information.
- Click the **SAVE** button located at the bottom of the form; click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

School or College	Degree Name	Degree Date	Type	fficial ion	Degree Discipline
University of Miami	820 Doctor of Medicine	07-JUN-1964	HD		51.12 - Medicine (MD).
University of Alabama at Birm...	780 PH.D. in Public Health	20-MAY-1970	OD		51.22 - Public Health.

Comments

Address      Return to Previous Form      Save

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

### Entering Address and Phone Information

1. When adding a **Campus Secondary** or **Tertiary** address or additional phone information, click on the **ADDRESS** button at the bottom of the **PERSON DATA** form.
2. To add a **CAMPUS SECONDARY** and/or **TERTIARY** address, press the down arrow on your keyboard. This will scroll to blank address fields.

The screenshot shows a form titled "Address" with two columns: "Current" and "Proposed". Each column has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The "Proposed" column fields are highlighted in yellow. Below the "Current" column, it says "Use the down arrow to view multiple records." Below the "Proposed" column, it says "Use the down arrow to create multiple records."

3. Click on the **ADDRESS TYPE** LOV and select **CAMPUS SECONDARY** and/or **TERTIARY** address. Click **OK**.
4. Click in the **BUILDING** field. Enter **the building code**, if known. You may choose the building

The screenshot shows a List of Values (LOV) window titled "Find %". The list contains the following items: Type, Campus Primary, Campus Secondary (highlighted in blue), Campus Tertiary, and Home. At the bottom of the window are buttons for "End", "OK", and "Cancel".

information from the LOV using the percent sign (%) and a partial name to limit the list. The full name of the campus building will populate the field titled **ADDRESS LINE3**.

5. Enter **the room number** in the **ROOM** field.
6. Enter the city name in the **CITY** field. The LOV listing will display and you can choose the correct city from the listing. The **STATE** field should be populated automatically after choosing the city from the LOV.
7. Type in **the appropriate zip code** in the **ZIP CODE** field if one was not automatically entered.
8. Enter **the four-digit extension** to ensure that the employee receives campus mail.

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

9. Click the **SAVE** button.

Address		Current	End Date	Current	Proposed
Address Type					Campus Secondary
Building					AB
Room					B 91E2
Address Line3					ADMINISTRATION BUILDING
City					Birmingham
State					AL
Zip Code					35294 - 1234

Use the down arrow to view multiple records. Use the down arrow to create multiple records.

10. If adding additional phone numbers, click in the first blank **TYPE** field of the **PHONES** region.

Phones				
Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		Campus Primary	(205) 934-1234	01-APR-2011
<input type="checkbox"/>		Home	(205) 467-4185	01-APR-2011
<input type="checkbox"/>				

Use the down arrow to create multiple records.

11. To add a **CAMPUS SECONDARY** or **TERTIARY** phone, click on the **PHONE TYPE LOV** and select **CAMPUS SECONDARY** or **TERTIARY**; Click **OK**.
12. Enter *the ten-digit number* in the **PHONE NUMBER** field.
13. Choose the effective date from the Calendar LOV in the **DATE FROM** field or type it directly into the field. This is will be the effective date of the Additional Assignment document.

Phones				
Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		Campus Primary	(205) 934-1234	01-APR-2011
<input type="checkbox"/>		Home	(205) 467-4185	01-APR-2011
<input type="checkbox"/>		Campus Secondary	(205) 996-5595	01-MAY-2011

Use the down arrow to create multiple records.

14. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**. Click on the **SAVE** button.

15. Click on the **RETURN TO PREVIOUS FORM** button.

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

### Entering Assignment Information

The Information on the **ASSIGNMENT** form identifies the employee's employment status for this assignment, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting worked time to payroll.



## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

1. Click on the **ASSIGNMENT** button on the bottom of the **ACT MAIN FORM**.

2. Select *the appropriate category* from the **ASSIGNMENT CATEGORY LOV** or type it in the field.

3. Click in the **ORGANIZATION** field; type *the appropriate organization* in which the employee will be affiliated. Press **Enter**. The **Location** field will automatically populate.

The screenshot shows a web form titled "General Assignment Information" with two tabs: "Current" and "Proposed". The "Proposed" tab is selected. The form contains several input fields for "Current" and "Proposed" data. The "Assignment Category" field in the "Proposed" section is highlighted in yellow. Below the form is a "Comments" text area and two buttons: "Return to Previous Form" and "Save".

4. Click in the **POSITION** field, select the **POSITION CODE** from the position LOV. By entering the correct position, the **LOCATION**, **JOB** and **GRADE** fields will be auto populated.

5. Type in the **PAYROLL GROUP** or use the LOV to enter the information.

This screenshot is similar to the previous one but shows more data populated in the "Proposed" tab. The "Assignment Category" is "04 Irregular", "Status" is "Active Assignment", "Organization" is "340000000 School of Nursing Dear Bham Main Campus", "Location" is "340000000.00206.110615", "Job" is "FF217E3.Financial Officer III", and "Grade" is "W.G18". The "Payroll Group" field is highlighted in yellow. The "Comments" field is empty. The "Return to Previous Form" and "Save" buttons are visible at the bottom.

Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.

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The screenshot shows a form titled "General Assignment Information" with two columns: "Current" and "Proposed". The "Current" column has fields for Assignment Category, Status, Expected Return Date, Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, Timekeeping Organization, Supervisor Name, and Supervisor Assignment #. The "Proposed" column has a dropdown menu set to "Active Assignment" and several empty fields below it.

Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number. Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.

The screenshot shows a "Supervisor Info" window with a search bar labeled "Find %". Below the search bar is a table with the following data:

Full_Name	Assignment_Number	Job_Name	Org_Name
Employee, Employee	1555555	HR812M0.MGR-PHYSICAL THERAPY	708400000 Rehabilitation Services
Employee, Testing 1	1555551	HR206E1.PHYSICAL THERAPIST	708400000 Rehabilitation Services
Employee, Relations	1555552	AA305N0.MEDICAL & DENTAL STAF...	708100000 Quality Resources
Employee, Sample 1	1555553	AC100N1.Admin Assoc	311401000 Med - Cardiovascular D

At the bottom of the window are buttons for "Find", "OK", and "Cancel".

6. If this is a biweekly assignment, enter the employee's timekeeping information.
  - a. If the organization has designated several timekeeper approvers, the Workflow Officer for the organization may have assigned Timecard Distribution Numbers to each timekeeper. If timekeepers have these numbers, enter the **timecard distribution number** of the person to whom this employee's timesheet should be distributed to in the **TIMECARD DIST NUMBER** field.
  - b. Enter **TAMS** (Hospital employees), **DB** (Design Build employees) or **TEL** (Time Entry, and Labor for the rest of the campus) in the **TIMEKEEPING METHOD FIELD** or use the LOV to enter the information.
  - c. If the timekeeping organization is different from the appointing organization, enter the **organization** in the **TIMEKEEPING ORGANIZATION** field or select it from the LOV.
7. If this is a monthly assignment, leave the above three fields blank.

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8. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
9. Click the **SAVE** button at the bottom of the form.
10. Click on the **SALARY** button located at the bottom of the **ASSIGNMENT** form.

### Entering Salary Information

The Salary information should be completed before entering the Labor Sources data.

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1. Click the **SALARY** button at the bottom of the **ACT MAIN FORM**. This will open the **SALARY** Form.

**Note:** Required field must be completed first. Yellow required fields will vary based on other field information such as Organization and Position. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.

2. If required, using the **SALARY BASIS LOV** select the appropriate salary basis and click

The screenshot shows the 'Salary (Create New Document)' form. It contains several input fields for personal and document information, a table for 'Component Reasons', and a comparison table for 'Current' vs 'Proposed' salary details. A modal error message is displayed over the 'Salary Basis' field, stating: 'ACT Salary Message: Salary Basis should be selected to enter Component Reason.' The 'Salary Basis' field in the background is highlighted in yellow. At the bottom of the form are 'Return to Previous Form' and 'Save' buttons.

Current	Proposed
Projected Assignment Salary	
Actual Assignment Rate of Pay	
FTE	
Hosp Calc Code	
Premium Plan	
Salary Basis	
Payroll	
Outside Income Source	
Outside Income	(Annual)
CFB Code	
Comments	

**OK.**

3. Enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is

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**strongly recommended** that you enter this information for Records. For explanation of FTE [click here](#).

Component Reasons			
Reason	Change Value	Change %	
			Change value = Full monthly rate of pay.
Use the down arrow to create multiple records.			
	<b>Current</b>		<b>Proposed</b>
Projected Assignment Salary			
Actual Assignment Rate of Pay			
FTE			0.20
Hosp Calc Code			
Premium Plan			
Salary Basis			Salary ...
Payroll			MONTHLY
Outside Income Source			
Outside Income			
CFB Code			(Annual)
.Comments			
<input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/>			

4. Click in the **REASON** field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields.

Component Reasons			
Reason	Change Value	Change %	
			Change value = Full monthly rate of pay.
Use the down arrow to create multiple records.			

5. Select ***the appropriate reason*** from the LOV or type the information in the **REASON** field. If you selected:
  - a. **Additional Assignment**: Used when the employee working an Additional Assignment is to be paid through the normal Bi-weekly or Monthly Payroll.
    - Click in the **CHANGE VALUE** field; enter either the **hourly rate** (for a biweekly paid employee) or the **monthly rate** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered. Then continue with number 5.
  - b. **No Recurring Pay**: Used when the employee working an Additional Assignment is to be paid using a nonrecurring element.

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6. Click on the **SAVE** button at the bottom of the **SALARY** form.
7. Click **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.
8. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM**.
9. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK**.

**Note: There are only two outside income sources -- VA and Eye Foundation.**

10. Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
11. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
12. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ASSIGNMENT** form.
13. Click the **LABOR SOURCE** button at the bottom of the **ASSIGNMENT** Form. [Click here for instructions on entering Labor Source Information.](#)

### **Entering Element Entries**

Additional Assignments being paid from a nonrecurring element can be submitted each month using a new nonrecurring element document or can be entered at the time the Additional Assignment document is created. If a known end date has been entered on the Person Data form, and the amount to be paid for the designated period of time has been determined, you may enter an element for each month the employee is to be paid on the Additional Assignment document.

1. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM**.

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The screenshot shows the 'Element Entry' form. It has a table with columns: Costed, Stop, Element Name, Effective Start Date, Effective End Date, and Recurring. The 'Element Name' field is currently empty and has a small dropdown arrow circled in red. Below the table is a 'Comments' text area. At the bottom are buttons for 'Entry Values', 'Labor Sources', 'Return to Previous Form', and 'Save'. A note states: 'Note: Exiting the Entry Values form automatically saves changes made on that form.'

2. Click on the LOV for the **ELEMENT NAME** field, and choose **the appropriate element name**. For a complete listing of available elements and descriptions go to the Financial Affairs webpage. [Click here.](#)
3. The **EFFECTIVE START DATE** will be auto populated with the effective date of the document. The **EFFECTIVE END DATE** will be auto populated with the last day of the payroll period in which the document is to be paid.

The screenshot shows the 'Element Entry' form with the following data entered:

Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Special Compensation	01-MAY-2011	31-MAY-2011	<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"/>

The 'Comments' section is empty. The same buttons and note from the previous screenshot are present at the bottom.

4. In the **COMMENTS** section enter **a brief explanation of the payment and what services the individual provided to the University.**

The screenshot shows the 'Comments' text area with the text 'Teaching a class for the spring semester.' entered.

5. Click on the **SAVE** button at the bottom of the form before clicking on the **ENTRY VALUES** button. **If you do not save the screen before attempting to click on the ENTRY VALUES button, you will receive this error message.**

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6. Click on the **OK** button to return to the **ELEMENT** screen; click the **SAVE** button at the bottom of the form.

7. Click on the **ENTRY VALUE** button at the bottom of the form.

8. Click in the **AMOUNT** field and enter *the monetary amount to be paid for the designated period of time*. The remaining fields will auto populate as needed.

9. Click on the **X** to close and save this information.

**Note:** *There is not a Save button on the Entry Values window. Exiting this screen automatically saves the changes.*

10. If submitting multiple payments, click in the next available line in the **ELEMENT NAME** field.

11. Click on the LOV for the **ELEMENT NAME** field, and choose *the appropriate element name*.

12. Click in the **EFFECTIVE START DATE** field; enter *the effective date of the next pay*. The effective **END DATE** field will populate with the appropriate end date.

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Special Compensation	01-MAY-2011	31-MAY-2011	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Special Compensation	01-JUN-2011	30-JUN-2011	<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"/>

13. Repeat Steps 4 through 10 for each subsequent month.

**Note:** *best practice is to limit element payments to no more than four monthly nonrecurring payments per ACT document.*

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14. Once all **ELEMENT ENTRIES** have been entered; click on the **LABOR SOURCE** button at the bottom of the **ELEMENT ENTRIES** form.

### Entering Labor Source Information

The Labor Sources identifies what account string(s) the employee's salary will be costed (charged) to. Because the GL and GA account structures are different, there are differences in entering the account string data.

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### Entering General Ledger (GL) Information

Projected Assignment Salary **6,240.00** Element Name

**Costing**

Assignment  Element

Current		Effective Date		GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>			<input type="text"/>					
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

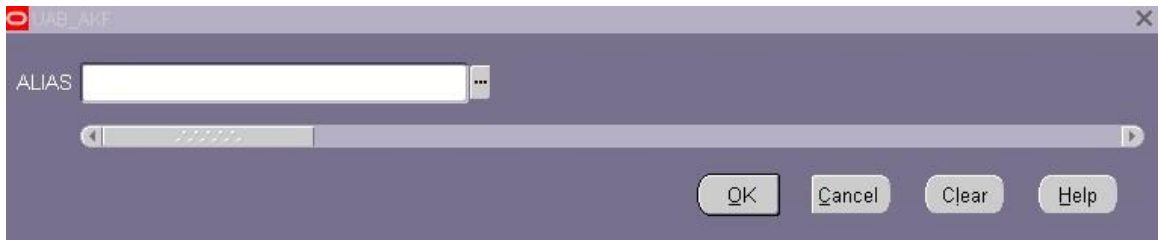
Comments:

Total LD % **.00**

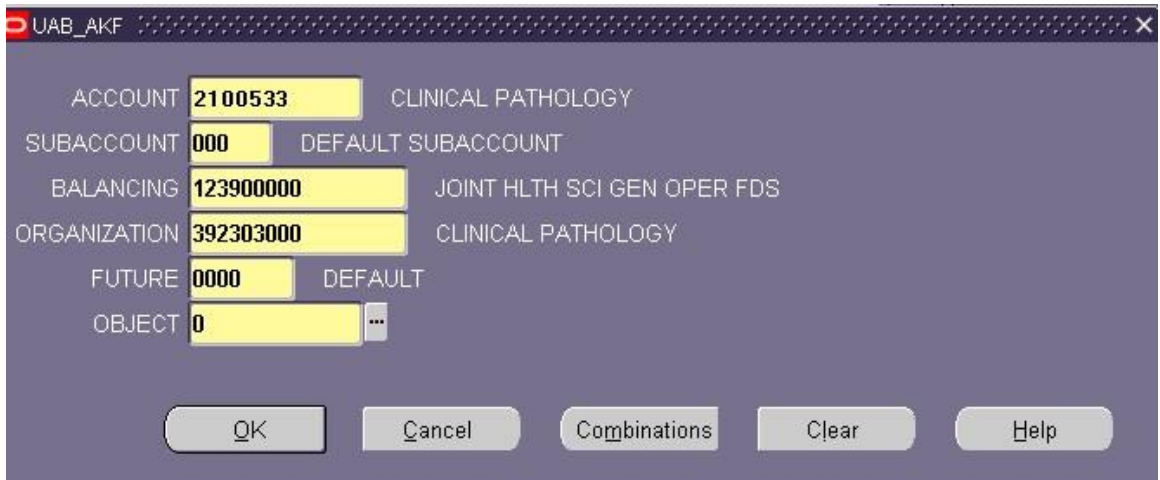


## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

1. Click on the **GL CODE** LOV. This opens the **UAB\_AKF FIND** window.



2. 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.



3. Click in the **OBJECT** field and enter **Zero (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.
4. 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.**

5. Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field must total **100%** before you can save the document.

## Appoint, Change and Terminate (ACT) Documentation Additional Assignment

Projected Assignment Salary: 6,240.00      Element Name: [dropdown]

**Costing**

Assignment		Element		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date								
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009				2100503.000.123900000.392303000					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

- Once the **TOTAL LD%** field equals 100%, clicks **SAVE**.

### Entering Grant (GA) Funding Sources

- Click one time in the **PROJECT** field of the next available row.

Projected Assignment Salary: 6,240.00      Element Name: [dropdown]

**Costing**

Assignment		Element		Effective Date		GL Code	Project	Task	Award	Exp Or	%
Current	Stop	From Date	To Date								
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009				2100503.000.123900000.392303000					50.00
<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 %: 50.00

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.

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.

Type the **award number** in the **AWARD** field or choose the **Award number** from the LOV. **TAB** to or click in the next field.

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.**

- Type in the **percent of the employee's effort** to be charged to the project number in the **%** field.
- 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 Additional Assignment

Current ID	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009			3101059.000.213101059.311401000					50.00
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009	31-JUL-2010			223014	01.01	1523014	10	50.00
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									

**Note: TOTAL LD% must equal 100% before you can save the document.**

10. 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.
11. Click in the checkbox next to **ATTACHMENTS** if necessary.
12. Click the **SUBMIT** button at the bottom of the **ACT MAIN FORM**.

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