

Appoint, Change, Terminate (ACT) Documentation Part One: Creating a Create Volunteer Document

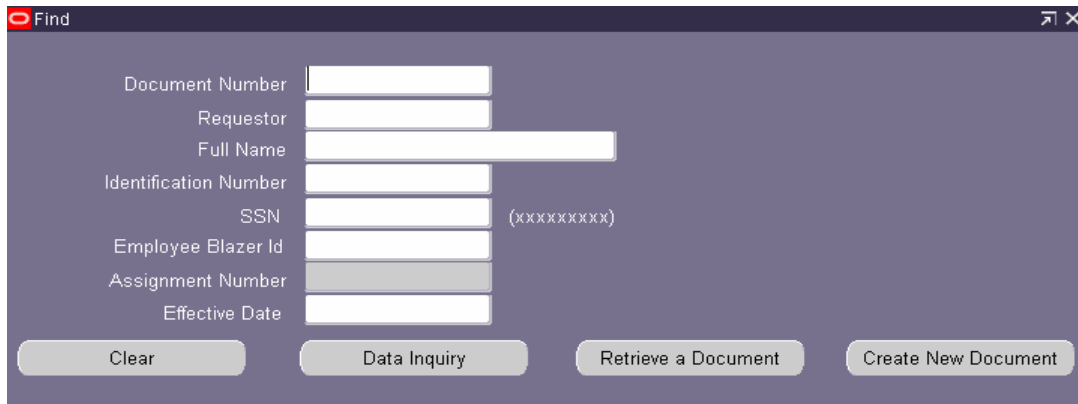
The Create Volunteer ACT Document is completed by the HR Officer to **appoint** all **new volunteers** who have **never** been affiliated with UAB in an active employee status, or volunteer status.

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

The information entered on the ACT form for a Volunteer provides the data needed to create the official personnel record of that Volunteer. While it may seem to be a rather lengthy process, much of this data is used for reporting throughout the University and to external agencies. Therefore, providing as much data as possible and ensuring its accuracy is important. It is recommended that before starting this procedure you have all of the information for the new volunteer in front of you and that you complete it in sequential order

Creating a Create Volunteer Document

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



The screenshot shows a window titled "Find" with a search form. The form contains the following fields and buttons:

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"/>

At the bottom of the form are four buttons: "Clear", "Data Inquiry", "Retrieve a Document", and "Create New Document".

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2. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.

ACT Main Form

Document Reason [LOV] Effective Date [] Requestor Name **HALEY** Attachments [] Received []

Document Number [] Document Status [] Workflow Type [] Submit Date []

Person Data

Name [] Gender [] Identification Number [] Ethnic Origin [] SSN [] Total Active Assignments [] Latest Hire Date [] Total Annual Salary [] Date of Birth [] Prior UAB Service []

Assignment Data

Assignment Number [] Assignment Status [] Assignment Category [] Organization [] Job [] Position [] FTE [] Primary [] Assignment Salary [] Payroll []

Person [] Address [] Assignment [] Salary [] Element Entries [] Labor Sources []

Comments []

Person Data [] Address [] Assignment [] Salary [] Element Entries [] Labor Sources []

Save [] Submit [] Cancel this document [] Log [] Reassign []

3. Click on the **LOV** box in the **DOCUMENT REASON** field.
4. Choose **Create Volunteer**, click **OK**. Once you click OK you will be directed back to the **ACT MAIN FORM**.

Document Reason

Find % []

Doc_Reason	Doc_Type
CREATE VOLUNTEER	HIRE
NEW HIRE	HIRE
NEW TRAINEE AWARD	HIRE

Find [] OK [] Cancel []

5. Enter the **Effective Date** in the **EFFECTIVE DATE** field. **Note: This date cannot be changed once you have submitted the document.** Use the calendar **LOV** or type in the desired date using the **DD-MMM-YY** Format.

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6. Click **SAVE**. The system will assign a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** is **OPEN**.

BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE CREATE VOLUNTEER DOCUMENT. You will not be able to locate the new volunteer by their name, social security number, or volunteer ID number until the document has reached a **COMPLETE** status.

The screenshot displays the 'ACT Main Form' interface. At the top, the title bar reads 'ACT Main Form'. The form is divided into several sections:

- Document Information:** Document Reason: CREATE VOLUNTEER; Effective Date: 17-OCT-2005; Requestor Name: [empty]; Attachments: [checkbox]; Received: [checkbox].
- Document Details:** Document Number: 125736; Document Status: OPEN; Workflow Type: HIRE; Submit Date: [empty].
- Person Data:** Name, Identification Number, SSN, Latest Hire Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Annual Salary, and Prior UAB Service [checkbox].
- Assignment Data:** Assignment Number, Assignment Category, Job, FTE, Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll.
- Navigation:** Checkboxes for Person, Address, Assignment, Salary, Element Entries, and Labor Sources.
- Comments:** A text area for entering comments.
- Buttons:** Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, and Reassign.

Note: The document reason and/or effective date **CAN** be changed at this point. Once you advance on to the **PERSON DATA SCREEN** and press the **SAVE** button, you **CAN NOT** return to the **ACT MAIN FORM** and change the **DOCUMENT REASON** or **EFFECTIVE DATE**. The document will have to be cancelled and a new document created using the correct document reason and/or effective date.

7. Click the **PERSON DATA** button located at the bottom of the **ACT MAIN FORM**.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

The Person Data screen contains the demographic information and other personal data that is grouped into five sub forms and two buttons on the ACT form. The sub forms to be completed on a Create Volunteer document are Personal, Employment, Directory, and License. The Termination tab will not be used. The two related buttons contain Address and Schools and Colleges data. Instructions for each sub form and each button are listed separately.

Entering Person Data

1. Click on the **PERSON DATA** tab at the bottom of the ACT Main Form.

The screenshot shows the 'ACT Main Form' window. At the top, there are fields for 'Document Reason' (CREATE VOLUNTEER), 'Effective Date' (17-OCT-2005), 'Requestor Name', 'Document Number' (125736), 'Document Status' (OPEN), 'Workflow Type' (HIRE), and 'Submit Date'. Below this is the 'Person Data' section, which is highlighted with a yellow background. It contains fields for Name, Identification Number, SSN, Latest Hire Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Annual Salary, and a checkbox for 'Prior UAB Service'. Underneath is the 'Assignment Data' section with fields for Assignment Number, Assignment Category, Job, FTE, Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll. At the bottom of the form are several tabs: Person, Address, Assignment, Salary, Element Entries, and Labor Sources. The 'Person Data' tab is selected and highlighted in yellow. Below the tabs are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

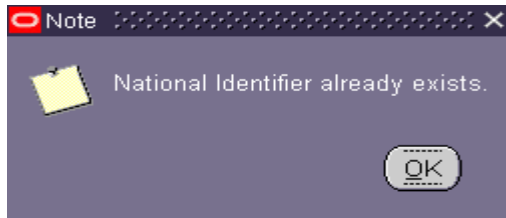
2. The **PERSON DATA SCREEN** opens. Required fields are yellow and must be completed before you can save the form and move on.

The screenshot shows the 'Person Data' screen with tabs for Personal, Employment, Directory, License, and Termination. The 'Personal' tab is selected. The screen is divided into two columns: 'Current' and 'Proposed'. The 'Proposed' column has several fields highlighted in yellow, indicating they are required: SSN, Last Name, First Name, Middle Names, Suffix, Title, Date Of Birth, and Gender. The 'Current' column has corresponding fields that are not highlighted.

3. Enter the **Social Security number** in the **SSN** field; **do not enter dashes**. Press **TAB** or click in the next field.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

Note: If you receive the following note after entering the social security number, the volunteer's personal data already exists in the Administrative Systems. A *Rehire* document will need to be completed on this volunteer. (For instructions on how to complete a *Rehire* Document [click here](#).



4. Enter the **volunteer's last name** exactly as it should appear in the **LAST NAME** field. **Remember this is the volunteer's official UAB electronic document. The FIRST letters of all names are to be capitalized; REMAINING letters are to be lower case.** Press **TAB** or click in the next field.
5. Enter the **volunteer's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
6. Enter the **volunteer's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
7. Enter the **volunteer's suffix**, in the **SUFFIX** field if applicable. **Example: Sr., Jr., III, etc.** Press **TAB** or click in the next field.
8. Click once in the **TITLE** (Mr. Mrs. Miss) field. Choose **appropriate title** from LOV or type it directly into the field. **Once you have selected the title, the GENDER field will automatically populate based on title choice.**
9. Click once in the **DATE OF BIRTH** Field. Enter the **volunteer's birth date** using the **DD-*MMM*-YY** format.

	Current	Proposed
SSN		214.70-1254
Last Name		Applebee
First Name		JoAnne
Middle Names		
Suffix		
Title		Ms.
Date Of Birth		11-NOV-1960
Gender		FEMALE

10. Click the **SAVE** button at the bottom of the screen.
11. Once you click the **SAVE** button, the screen will move to the **EMPLOYMENT** Tab.

Appoint, Change, Terminate (ACT) Documentation

Create Volunteer – Part Two: Entering Person Data

Entering Employment Information

	Current	Proposed
Ethnic Origin	<input type="text"/>	<input type="text"/>
Veteran Status	<input type="text"/>	<input type="text"/>
I-9 Status	<input type="text"/>	<input type="text"/>
Visa Type	<input type="text"/>	<input type="text"/>
Work Visa Expiration Date	<input type="text"/>	<input type="text"/>

1. In the **ETHNIC ORIGIN** field, click the LOV and select the *volunteer's ethnic origin*. Click **OK**.

Ethnic Origin

Find %

- Ethnic Origin
- White / Non Hispanic
- Black / Non Hispanic
- Hispanic
- Asian / Pacific Islander
- American Indian / Alaskan

2. Enter the **I-9 STATUS** or select the appropriate I-9 Status from the **LOV**. Click **OK**.

I-9 Status

Find %

- I-9 Status
- No
- Not Required - Trainee
- Yes

End OK Cancel

NOTE: The *Ethnic Origin* and *I-9 Status* fields are not required fields for a **CREATE VOLUNTEER** document. However, it is recommended you enter the information if it is available.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

- Click in the **VISA TYPE** field only if the volunteer has a Visa. If the volunteer was born in the United States and has maintained citizenship in the United States, leave the **VISA TYPE** field blank.
 - Select the appropriate **Visa Type** from the **LOV**, if applicable.
 - If a Visa Type has been chosen, you must enter a **date** in the **WORK VISA EXPIRATION DATE** field. This must be a future date.
- Click the **SAVE** button at the bottom of the screen.
- Click on the **DIRECTORY** Tab.

Entering Directory Information

	Current	Proposed
Alpha List	<input type="text"/>	<input type="text" value="..."/>
Online List	<input type="text"/>	<input type="text" value="Yes"/>
Directory Title	<input type="text"/>	<input type="text"/>
Directory Name	<input type="text"/>	<input type="text"/>

- Click the **LOV** in the **ALPHA LIST** field. Choosing **Yes** will include the volunteer's information in the UAB paper phonebook listing; choosing **No** will exclude the volunteer. Click **OK**.
- ONLINE LIST** field defaults to Yes. All volunteers will be listed in the UAB Electronic phonebook.
- Click in the **DIRECTORY TITLE** field **only** if the volunteer's title to be listed in either the UAB paper phonebook or electronic phonebook is **different** than the assigned job title. Enter the ***desired job title***.
- Click in the **DIRECTORY NAME** field **only** if the volunteer's name is to be listed in either the UAB paper phonebook or electronic phonebook **differently** than what was entered on the **PERSONAL** Tab. **The proper format for this field is: last name, first name. No space between the comma and first name.**
- Click the **SAVE** button at the bottom of screen.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

Entering License, Certification, Membership Information

1. Click on the **LICENSE** tab if applicable. **Note: Information entered on this tab is entered only when the volunteer holds a professional license, membership or certification.**

The screenshot shows a software interface with tabs for Personal, Employment, Directory, License, and Termination. The 'License' tab is active. Below the tabs is a section titled 'License/Certificate/Membership Information'. This section is divided into two columns: 'Current' and 'Proposed'. Each column has four input fields: 'Type', 'Title', 'Number', and 'Expiration Date'. The 'Proposed' 'Type' field has a dropdown arrow. Below the input fields, there is a note: 'Use down arrow to create multiple records.'

2. Using the LOV in the **TYPE** field; choose the **appropriate License type**. **Note: If you choose License, the Title, Number, and Expiration Date fields become required fields.**

The screenshot shows a list of values (LOV) for the 'Type' field. The list includes: Name, Certification, License (highlighted in blue), Membership, and Professional Competency Certification.

3. If you select **License**, a screen listing of **LICENSE TITLES** appears. Select the appropriate **License title**, Click **OK**.

The screenshot shows a dialog box titled 'License Title'. It has a search field labeled 'Find %'. Below the search field is a list of license titles. The first item, 'Architect', is highlighted in blue. Other items in the list include: Cert. Nurse Anesthetist, Cert. Public Accountant, Dentist, Dietician, Engineer, Professional, Lawyer, Licensed Practical Nurse, Medical Doctor, LIC/CERT Unknown, Medical Doctor, Perm Foreign L/C, Medical Doctor, Perm US LIC/CERT, and Medical Doctor, Temp Foreign L/C. At the bottom of the dialog box are three buttons: 'Find', 'OK', and 'Cancel'.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

4. If you select **Certification, Membership or Professional Competency**, you will need to type **the appropriate title** in the **TITLE** field.
5. Type the **License Number** in the **NUMBER** field, if applicable.
6. In the **EXPIRATION DATE** field, choose the **expiration date** from the Calendar LOV or type the **date** in the **EXPIRATION DATE** field using the **dd-mmm-yy** format. **Note: This date must be a future date.**

The screenshot shows a web form with a navigation bar at the top containing tabs for Personal, Employment, Directory, License, and Termination. The 'License' tab is selected. Below the navigation bar is the 'License/Certificate/Membership Information' section, which is divided into two columns: 'Current' and 'Proposed'. The 'Current' column has four input fields for Type, Title, Number, and Expiration Date. The 'Proposed' column has three input fields with the following values: License (License), Registered Nurse, 1.096578, and 31-DEC-2006. Below these fields is the instruction 'Use down arrow to create multiple records.' At the bottom of the form is a 'Comments' text area and a row of buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

License/Certificate/Membership Information	
Current	Proposed
Type	License
Title	Registered Nurse
Number	1.096578
Expiration Date	31-DEC-2006

Use down arrow to create multiple records.

Comments

Address Schools and Colleges Return to Previous Form Save

7. Click **SAVE** at the bottom of the screen; click the **ADDRESS** button to begin entering the volunteer's address information.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

Entering Address and Phone Information

The screenshot shows the 'Address and Phones' form for 'Applebee, JoAnne'. The form is titled 'Address and Phones (Retrieve a Document)'. It contains the following fields:

- Full Name: **Applebee, JoAnne**
- Document Reason: **CREATE VOLUNTEER**
- Identification Number: [Empty]
- Document Number: **125736**
- Assignment Number: [Empty]
- Document Status: **OPEN**
- Effective Date: **17-OCT-2005**

The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. The 'Proposed' column has corresponding fields. There is a checkbox for 'End Date Current' and a dropdown arrow in the 'Proposed' Address Type field. Below the address fields is the instruction: 'Use the down arrow to create multiple records.'

The 'Phones' section has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. There are three rows, each with a checkbox in the 'Delete' column. Below the table is the instruction: 'Use the down arrow to create multiple records.'

At the bottom, there is a checkbox for 'International Address' and a 'Comments' field. At the very bottom are two buttons: 'Return to Previous Form' and 'Save'.

Note: All volunteers must have a local (US) address and/or campus address in order to receive correspondence. Volunteer's can change their home address through the Self Service once the Create Volunteer document is in COMPLETE status, Campus address and phone numbers must be changed via a Data Change ACT Document.

1. Type **Home** or make the selection from the LOV in the **ADDRESS TYPE** field. Click **OK**.

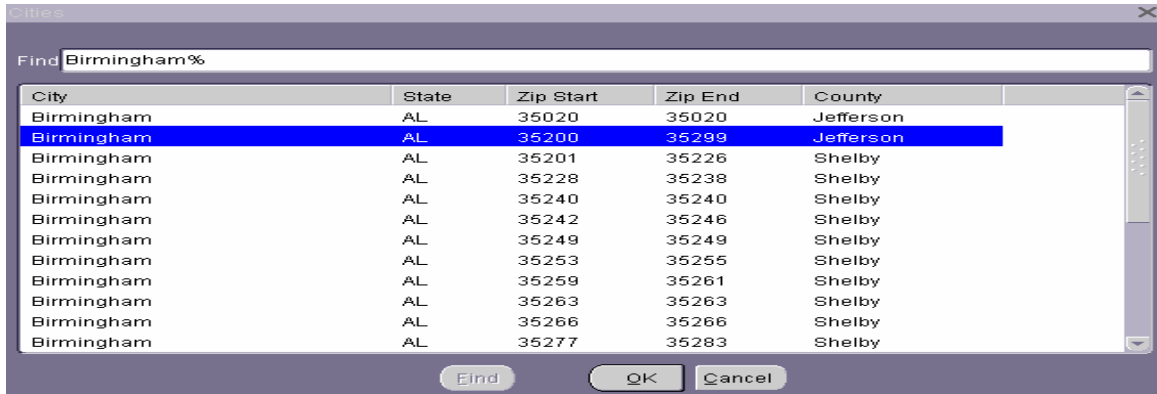
The screenshot shows the 'Address Types' LOV (List of Values) for the 'ADDRESS TYPE' field. The LOV has a search bar with 'Find %' and a list of options:

- Type
- Campus Primary
- Campus Secondary
- Campus Tertiary
- Home** (highlighted)
- Recruiting

At the bottom of the LOV are three buttons: 'Find', 'OK', and 'Cancel'. A line from the 'Home' option in the LOV points to the 'Proposed' Address Type field in the 'Address' section of the form above.

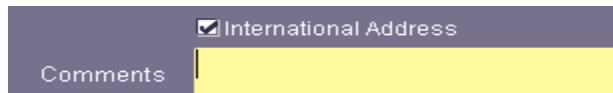
Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

2. Enter the **volunteer's street address** in the **ADDRESS LINE1** field. There are two additional address lines available if needed.
3. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type **the name of the city in which the volunteer lives**, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.



4. Highlight the **correct zip code range** for the city and county in which the volunteer lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

Note: If the volunteer has an international address and phone number, check the International Address checkbox. The Comments box will turn yellow indicating that it is now a required field. Enter the international address and phone number in the Comments box. The Campus Address should be entered as Home in the Address Type field. The Department name on Address Line 1, Street Address on Address Line 2 and the building and room number on Address Line 3.



6. To enter the **campus address**, click in the **ADDRESS TYPE** field and **press the down arrow**. The **ADDRESS TYPE** field becomes blank. Click on the **LOV** and select **Campus Primary**. Click **OK**.
7. Enter the **two letter building code** in the **BUILDING** field. Click in the **ROOM NUMBER** field, the **ADDRESS LINE3** field will populate with the UAB building associated with the two letter code entered.

Note: Building field LOV provides a listing of all UAB Buildings and Building Codes. This is a rather long list so be as specific as possible when trying to locate a building. Using the percent (%) sign and the first letter of the building name will help to limit the list.

8. Enter the **room or floor number** in the **ROOM** field.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

9. In the **CITY** field, type in the **name of the city** in which the UAB building is located. The **CITIES** LOV will open; select the **correct Zip Start-Zip End** range for the UAB building selected. Click **OK**.
10. Enter the **four-digit zip code extension** for the department in which the volunteer will be working to ensure that the volunteer receives his or her campus mail. Click **SAVE**.

The screenshot shows the 'Address' section of a form. It is divided into 'Current' and 'Proposed' columns. The 'Current' column has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' column has fields for Campus Primary, NHB, 525, NEW HILLMAN BUILDING, Birmingham, AL, 35294, and 0011. A note at the bottom right says 'Use the down arrow to create multiple records.'

11. Repeat the steps 6 - 10 if a Campus Secondary address is necessary.
12. To enter phone numbers for volunteer, click in the **TYPE** field located Phones region of the form.

The screenshot shows the 'Phones' section of a form. It features a table with columns: Delete Current, Type, Phone Number (xxxxxxxxxx), and Date From. The 'Type' column is highlighted in yellow, and an arrow points to it. A note at the bottom says 'Use the down arrow to create multiple records.'

13. Type **Home** in the **TYPE** field or choose **Home** from the LOV.
14. Enter the **volunteer's ten digit home phone number** in the **PHONE NUMBER** field without dashes.
15. Type the **effective start date** in the **DATE FROM** field or use the calendar LOV. **Usually this is the effective date of the document.**
16. Click in **the row under the Home phone listing**. Type in **Campus Primary** or choose **Campus Primary** from the **PHONES TYPE** LOV.
17. Enter the **ten digit campus telephone number**.
18. Type the **effective start date** in the **DATE FROM** field or use the Calendar LOV. **Usually this is the effective date of the document.** Click the **SAVE**.

The screenshot shows the 'Phones' section of a form with two rows of data entered. The columns are Delete Current, Type, Phone Number (xxxxxxxxxx), and Date From. The first row has 'Home' in the Type field, '(205) 823-2161' in the Phone Number field, and '17-OCT-2005' in the Date From field. The second row has 'Campus Primary' in the Type field, '(205) 934-4680' in the Phone Number field, and '17-OCT-2005' in the Date From field. A note at the bottom says 'Use the down arrow to create multiple records.'

Note: Repeat these steps to enter additional phone numbers for the volunteer. Use the down arrow on your keyboard to enter multiple records, if necessary.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Two: Entering Person Data

Entering Schools and Colleges Information

1. To enter the volunteer's educational information, click the **SCHOOLS AND COLLEGES** button located on the bottom of the **PERSON DATA** screen.

2. Type in the **name of the school or college** or select it from the LOV.

Note: The School and College LOV include listings of Institutions within the United States however; if the institution does not appear in the LOV listing, select Institution Not Available in Listing. For Institutions outside of the United States select Foreign University.

3. Click in the **DEGREE NAME** field. Using the LOV, select the appropriate degree. Enter the highest level of degree the volunteer has earned, (Examples: High School Graduate, GED, Post High School Coursework, Bachelors, Masters, or PhD etc. Click OK.

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- Click in the **DEGREE DATE** field. Enter the **degree date** using the **dd-mmm-yy** format or use the Calendar LOV.

Schools and Colleges Attended				Faculty/Instructor Information		
Delete?	School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
<input type="checkbox"/>	Institution Not Available in List	101 High School Graduate	31-MAY-15	HD		
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

- Click in the **TYPE** field. Select **Other Degree (OD)** or **Highest Degree (HD)** from the LOV. A person can only have one highest degree. All others must be marked as Other Degree (OD).
- Repeat the above steps, as necessary, until all degrees are entered. Use the down arrow on the keyboard to create multiple records if necessary.

Note: Faculty/Instructor Information fields must be completed on all Faculty and Credential Staff Course Instructors. The Transcript/Official Documentation on File field must be marked YES, indicating an official transcript is on file in the appropriate Dean's office, before the ACT document will be approved by the Provost office.

- For Faculty and Credential Staff Course Instructors only. Type **Yes** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.

Faculty/Instructor Information	
Transcript/Official Documentation on File	Degree Discipline
Yes	

- Type the **appropriate Degree Discipline** as indicated on the volunteer's official transcript or completed Faculty Data Form, or use the LOV, to select the appropriate degree discipline.

Faculty/Instructor Information	
Transcript/Official Documentation on File	Degree Discipline
Yes	40.0807 - Optics/Optic

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Create Volunteer – Part Two: Entering Person Data

9. Click the **SAVE** button; then click return to **RETURN PREVIOUS FORM** button to return to the **PERSON DATA** form.
10. Click **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA** form to return to the **ACT MAIN FORM**.
11. Click the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Three: Entering Assignment Information

The information on the Assignment screen identifies the volunteer's assignment category and the organization and position number the volunteer is affiliated with.

1. Click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**. This will open the **ASSIGNMENT** form.

2. Click in the **ORGANIZATION** field; type the *appropriate organization* in which the volunteer will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.

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Create Volunteer – Part Three: Entering Assignment Information

- Click in the **POSITION** field, select the *position code* from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization - both vacant and filled. By entering the correct position, the **JOB** field and **GRADE** field will be auto populated.

Assignment (Retrieve a Document)

Full Name	Alexander, JoAnne	Document Reason	CREATE VOLUNTEER
Identification Number		Document Number	125736
Assignment Number		Document Status	OPEN
		Effective Date	17-OCT-2005

Effective Date From		Shift Differential Code	NA
Effective Date To		Grandparented	
Primary		Effort Report Eligible	

General Assignment Information	
Current	Proposed
Assignment Category	60 Volunteer
Status	Voluntary
Expected Return Date	
Organization	311653200 Ped - Neonatology
Location	Bham Main Campus
Position	311653200.99801.050320
Job	CG204N1.Office Assoc I
Grade	W.G08
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	

Salary Labor Sources Element Entries Return to Previous Form Save

- Click the **SAVE** button at the bottom of the screen. **Notice the Salary, Labor Sources, and Element Entries buttons are gray (not available). Volunteers do not require information on these three forms.**
- Click the **RETURN TO PREVIOUS** button at the bottom of the screen until you return to the **ACT MAIN FORM.**

Appoint, Change, Terminate (ACT) Documentation Create Volunteer – Part Four: Submitting a New Hire Document

Before Submitting the Create Volunteer document, verify all required information is entered and all attachments are ready to be submitted. The HR Officer submits the Create Volunteer document for approval. At that point, the document status changes from Open to Ready and enters the approval path.

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

Document Reason	CREATE VOLUNTEER	Document Number	125736
Effective Date	17-OCT-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Alexander, JoAnne	Gender	Female
Identification Number		Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	17-OCT-2005	Total Annual Salary	.00
Date of Birth	28-JAN-1946	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	Voluntary
Assignment Category	60 Volunteer	Organization	311653200 Ped - Neonatolo
Job	CG204N1.Office Assoc I	Position	311653200.99801.050320
FTE		Primary	
Assignment Salary	.00	Payroll	

Checkboxes: Person, Address, Assignment, Salary, Element Entries, Labor Sources

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign

1. On the **ACT MAIN FORM**, verify checks have been inserted in the checkbox next to **PERSON, ADDRESS AND ASSIGNMENT**.
2. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
3. Click the **SUBMIT** button.
4. The following **DECISION** window will display. Attachments are not required for a **Create Volunteer** document; click **No** to continue with submit.

The Decision window contains the following text:

Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.

Buttons: No, Yes

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8. 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).*

The screenshot shows the 'ACT Main Form' window. The document reason is 'CREATE VOLUNTEER', the document number is '125736', and the document status is 'READY'. The effective date is '17-OCT-2005' and the requestor name is 'HALEY'. The workflow type is 'HIRE' and the submit date is '14-OCT-2005 15:51:13'. The person data section includes the name 'Alexander, JoAnne', gender 'Female', ethnic origin 'White / Non Hispanic', latest hire date '17-OCT-2005', and date of birth '28-JAN-1946'. The assignment data section includes the assignment category '60 Volunteer', job 'CG204N1.Office Assoc I', and assignment status 'Voluntary'. The form also has checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. A comments field is present, and there are buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

****** BE SURE TO RECORD YOUR DOCUMENT NUMBER BEFORE YOU EXIT THE NEW HIRE DOCUMENT. You will not be able to locate the new volunteer by name, social security number, or volunteer ID number until the document has reached COMPLETE status.**

10. Once the **CREATE VOLUNTEER DOCUMENT** is submitted, and the document status changes to **READY**, the document has entered the Approval Path. The Document Status will change throughout the levels of Approval. Once the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

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Document Reason		Document Number	
Document Reason	CREATE VOLUNTEER	Document Number	125736
Effective Date	17-OCT-2005	Document Status	COMPLETE
Requestor Name	HALEY	Workflow Type	HIRE
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	14-OCT-2005 15:51:12
Person Data			
Name	Alexander, JoAnne	Gender	Female
Identification Number	1033579	Ethnic Origin	White / Non Hispanic
SSN	214-70-1254	Total Active Assignments	1
Latest Hire Date	17-OCT-2005	Total Annual Salary	.00
Date of Birth	28-JAN-1946	<input type="checkbox"/> Prior UAB Service	
Assignment Data			
Assignment Number	1033579	Assignment Status	Voluntary
Assignment Category	60 Volunteer	Organization	311653200 Ped - Neonatolo
Job	CG204N1.Office Assoc I	Position	311653200.99801.050320
FTE		Primary	
Assignment Salary	.00	Payroll	
<input checked="" type="checkbox"/> Person <input checked="" type="checkbox"/> Address <input checked="" type="checkbox"/> Assignment <input type="checkbox"/> Salary <input type="checkbox"/> Element Entries <input type="checkbox"/> Labor Sources			
Comments			
<div style="display: flex; justify-content: space-between; text-align: center;"> Person Data Address Assignment Salary Element Entries Labor Sources </div>			
<div style="display: flex; justify-content: space-around;"> Save Submit Cancel this document Log Reassign </div>			

11. The requestor of the **CREATE VOLUNTEER** document will receive email notification when the document has entered a **COMPLETE** status.

The volunteer can now create a **Blazer ID**. For information on setting up a **Blazer ID** [click here](#).

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