

Appoint, Change and Terminate (ACT) Documentation Data Change

The **DATA CHANGE** document is used to insert, update or correct an employee's personnel record in the Administrative System. When using the Data Change document reason the HR Officer will be able to make changes to the following personal information fields: 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.

All of the above fields are available for change when using a current or future effective date; however, only select fields are available for change when using a retroactive effective date. For a listing of fields available for change when using a retroactive effective date, [click here](#).

UAB HR Officer → HR Transactions → ACT → Find Window

Creating a Data Change Document

1. Locate the employee using the Find Window.



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

Note: After you click on the **CREATE NEW DOCUMENT** button you might see another window pop up. Some employees may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.

3. The **ACT MAIN FORM** will open.

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

- Document Information:** Document Reason (dropdown), Effective Date, Requestor Name (HALEY), Attachments, Received, Document Number, Document Status, Workflow Type, Submit Date.
- Person Data:** Name, Identification Number, SSN, Latest Hire Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Annual Salary, Prior UAB Service.
- Assignment Data:** Assignment Number, Assignment Category, Job, FTE, Assignment Salary, Assignment Status, Organization, Position, Primary, Payroll.
- Checkboxes:** Person, Address, Assignment, Salary, Element Entries, Labor Sources.
- Comments:** A text area for notes.
- Navigation:** Buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

4. When the new document opens, click once in the **DOCUMENT REASON** field.
5. Use the **DOCUMENT REASON LOV** to choose **DATA CHANGE** or type the words **Data Change** in the **DOCUMENT REASON** field.

The screenshot shows the 'Document Reason' LOV dialog box with a search field containing '%'. The list of values is as follows:

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

Buttons at the bottom: Find, OK, Cancel.

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- Click inside the **EFFECTIVE DATE** field, choose an effective date from the **CALENDAR LOV** or *type in the desired date*.

Note: Only select fields are available for change when using a retroactive effective date. For a listing of fields available for change when using a retroactive effective date, [click here](#)

- Click on the **SAVE** button at the bottom of the form.

The screenshot shows the 'ACT Main Form' interface. It is divided into several sections:

- Document Information:** Document Reason (DATA CHANGE), Effective Date (16-AUG-2007), Requestor Name (HALEY), Document Number (292779), Document Status (OPEN), Workflow Type (DATA CHANGE), and Submit Date.
- Person Data:** Name (Example, Hethe), Gender (Male), Identification Number (1112222), Ethnic Origin (White / Non Hispanic), SSN, Total Active Assignments (2), Latest Hire Date (14-NOV-1994), Total Annual Salary (xx,xxx.xx), and Date of Birth (25-DEC-1955). There is also a checkbox for Prior UAB Service.
- Assignment Data:** Assignment Number (1112222), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (111200000 Bartow Arena Oj), Job (MS316E1.Facilities Coord I), Position (111200000.00101.031001), FTE (1), Primary (Y), Assignment Salary (xx,xxx.xx), and Payroll (Monthly).
- Navigation and Comments:** A row of checkboxes for Person, Address, Assignment, Salary, Element Entries, and Labor Sources. Below this is a Comments field and a row of buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources.
- Bottom Bar:** A row of buttons: Save, Submit, Cancel this document, Log, Reassign, and a set of navigation arrows (<<, <, >, >>, *).

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Updating Personal Data

To update or change the employee's personal information, click on the **PERSON DATA** button from the **ACT MAIN FORM**.

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (DATA CHANGE), Effective Date (16-AUG-2007), Requestor Name (HALEY), Document Number (292779), Document Status (OPEN), Workflow Type (DATA CHANGE), Attachments (checkbox), Received (checkbox), Submit Date.
- Person Data:** Name (Example, Hethe), Gender (Male), Identification Number (1112222), Ethnic Origin (White / Non Hispanic), SSN, Total Active Assignments (2), Latest Hire Date (14-NOV-1994), Date of Birth (25-DEC-1955), Total Annual Salary (xx,xxx.xx), Prior UAB Service (checkbox).
- Assignment Data:** Assignment Number (1112222), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (111200000 Bartow Arena Oj), Job (MS316E1.Facilities Coord I), Position (111200000.00101.031001), FTE (1), Primary (Y), Assignment Salary (xx,xxx.xx), Payroll (Monthly).

At the bottom, there are tabs for Person, Address, Assignment, Salary, Element Entries, and Labor Sources. The 'Person Data' button is highlighted with a red box. Below the tabs are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

When the **PERSON DATA** form opens, you should be on the **PERSONAL** tab.

Personal Tab

The screenshot shows the 'Personal' tab of the form. It has a tabbed interface with 'Personal', 'Employment', 'Directory', 'License', and 'Termination'. The 'Personal' tab is highlighted with a red box. The form is divided into 'Current' and 'Proposed' columns:

- Current:** SSN, Last Name (Example), First Name (Hethe), Middle Names, Suffix, Title (Mr.), Date Of Birth (25-DEC-1955), Gender (MALE).
- Proposed:** Empty fields for SSN, Last Name, First Name, Middle Names, Suffix, Title, Date Of Birth, and a dropdown for Gender.

At the bottom, there are buttons for Address, Schools and Colleges, Return to Previous Form, and Save. A Comments field is also present.

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1. If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the above fields, [click here](#).

	Current	Proposed
SSN		
Last Name	Example	
First Name	Hethe	
Middle Names		
Suffix		
Title	Mr.	
Date Of Birth	25-DEC-1955	
Gender	MALE	

Comments

Address Schools and Colleges Return to Previous Form Save

2. If it is necessary to change an employee's gender, click on the **DROP DOWN ARROW** in the **GENDER** field under the **PROPOSED** column. A selection box similar to the one below will open. Select the correct gender.

MALE
FEMALE

3. Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

Employment Tab

4. If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, [click here](#).

	Current	Proposed
Ethnic Origin	White / Non Hispanic	
Veteran Status		
I-9 Status	Yes	
Visa Type		
Work Visa Expiration Date		

Comments

Address Schools and Colleges Return to Previous Form Save

5. Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

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Directory Tab

6. If necessary, enter the correct information in the appropriate field.

The screenshot shows the 'Directory' tab of the ACT system. It features two columns: 'Current' and 'Proposed'. Under 'Current', the fields are: Alpha List (Yes), Online List (Yes), Directory Title (Bartow Arena Facilities Coord), and Directory Name (empty). Under 'Proposed', the fields are: Alpha List (empty), Online List (empty), Directory Title (empty), and Directory Name (empty). To the right of the 'Proposed' section, there is a checkbox for 'Assignment Job Title' (unchecked) and a note '(Last Name, First Name) *** Please do not add suffix'. Below the form is a 'Comments' field and a row of buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

This screenshot shows the 'Proposed' Directory Title field updated to 'Facilities Coord I'. The 'Assignment Job Title' checkbox is now checked. The 'Current' fields remain the same as in the previous screenshot.

To replace the Directory Title displaying in the Electronic Phonebook; check the **Assignment Job Title** check box to populate the **Proposed Directory Title** field with the official Assignment Job Title; or manually enter a new Directory Title

This screenshot shows the 'Proposed' Directory Name field updated to 'Example, Skip'. The 'Assignment Job Title' checkbox remains checked. The 'Current' fields remain the same as in the previous screenshots.

To change the name displaying in the Electronic Phonebook, enter Full Name (using example format) in the **Proposed Directory Name** field.

7. Once all necessary fields have been updated or changed; click on the **SAVE** button, click on the **RETURN TO PREVIOUS FORM**.

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License Tab

8. If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, [click here](#).

The screenshot shows a web application interface with a purple header and a gray background. At the top, there are five tabs: Personal, Employment, Directory, License (selected), and Termination. 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. A red bracket on the right side of the "Proposed" column points to a text box that says "All Fields can be updated or changed". Below the input fields, there is a note: "Use down arrow to create multiple records." At the bottom of the form, there is a "Comments" section with a text area and a scroll bar. Below the comments section, there are four buttons: "Address", "Schools and Colleges", "Return to Previous Form", and "Save".

9. Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

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Termination Tab

10. If you have to enter a **Last Day of Work** for this employee, click on the **TERMINATION** tab.

The screenshot shows the 'Termination' tab selected. The form is divided into 'Current' and 'Proposed' columns. The 'Projected Last Day of Work' field in the 'Proposed' column has a dropdown arrow. Below the form is a 'Comments' field and a row of buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

11. Click in the **PROJECTED LAST DAY OF WORK** field. Choose the appropriate date from the **CALENDAR LOV** or type it into the field.

12. Click on the **SAVE** button if you have made changes, then click on the **RETURN TO PREVIOUS FORM**.

Updating or Entering Educational Information

To update or change the employee's educational information, click on the **SCHOOLS AND COLLEGE** button. The **SCHOOLS AND COLLEGES** button located on the **PERSON DATA** form.

This screenshot is identical to the previous one, but a red rectangular box highlights the 'Schools and Colleges' button in the bottom navigation bar.

The **SCHOOLS AND COLLEGES ATTENDED** form opens.

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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 Lis...	200 Post High School Coursework	01-JAN-1981	HD		
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Use down arrow to create multiple records

Use scroll bar to view/add discipline information

Comments

1. If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the above fields, [click here](#).
2. Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

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Updating Address and Phone Information

To update or change the employee's Address or Phone information, click on the **ADDRESS** button at the bottom of the **ACT MAIN FORM**.

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

Document Reason	DATA CHANGE	Document Number	292779
Effective Date	16-AUG-2007	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	DATA CHANGE
<input type="checkbox"/> Attachments		Submit Date	
<input type="checkbox"/> Received			

Person Data

Name	Example, Hethe	Gender	Male
Identification Number	1112222	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	2
Latest Hire Date	14-NOV-1994	Total Annual Salary	xx,xxx.xx
Date of Birth	25-DEC-1955	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1112222	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	111200000 Bartow Arena Oj
Job	MS316E1.Facilities Coord I	Position	111200000.00101.031001
FTE	1	Primary	Y
Assignment Salary	xx,xxx.xx	Payroll	Monthly

Navigation buttons: Person, Address, Assignment, Salary, Element Entries, Labor Sources

Comments: [Empty text box]

Buttons: Person Data, **Address** (highlighted with a red box), Assignment, Salary, Element Entries, Labor Sources

Bottom buttons: Save, Submit, Cancel this document, Log, Reassign, navigation arrows

The **ADDRESS AND PHONES** form will open.

The 'Address' form is divided into 'Current' and 'Proposed' sections.

Current Address:

Address Type	Home	End Date Current	<input type="checkbox"/>
Address Line1	Po Box 59104		
Address Line2			
Address Line3			
City	Birmingham		
State	AL		
Zip Code	35259 - 9104		

Use the down arrow to view multiple records.

Proposed Address:

Address Type	Home		
Address Line1			
Address Line2			
Address Line3			
City			
State			
Zip Code			

Use the down arrow to create multiple records.

Phones

Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Home	(205) 942-6855	14-NOV-1994
<input type="checkbox"/>	Campus Primary	(205) 934-7296	14-NOV-1994
<input type="checkbox"/>			

Use the down arrow to create multiple records.

International Address

Comments: [Empty text box]

Buttons: Return to Previous Form, Save

For Instructions on entering or changing address and phone information, [click here](#).

Once **ADDRESS AND PHONE** information has been updated, click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

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Updating Assignment Information

If the Location or the timekeeping information is changing, click on the **ASSIGNMENT** button, at the bottom of the **ACT MAIN FORM**.

The screenshot shows the 'ACT Main Form' window. It contains several sections of data entry fields:

- Document Information:** Document Reason (DATA CHANGE), Effective Date (16-AUG-2007), Requestor Name (HALEY), Document Number (292779), Document Status (OPEN), Workflow Type (DATA CHANGE), and Submit Date.
- Person Data:** Name (Example, Hethe), Identification Number (1112222), SSN, Latest Hire Date (14-NOV-1994), Date of Birth (25-DEC-1955), Gender (Male), Ethnic Origin (White / Non Hispanic), Total Active Assignments (2), and Total Annual Salary (xx,xxx.xx).
- Assignment Data:** Assignment Number (1112222), Assignment Category (01 Regular FT), Job (MS316E1.Facilities Coord I), FTE (1), Assignment Salary (xx,xxx.xx), Assignment Status (Active Assignment), Organization (111200000 Bartow Arena Oper), Position (111200000.00101.031001), Primary (Y), and Payroll (Monthly).

At the bottom, there are navigation buttons: Person Data, Address, Assignment (highlighted with a red box), Salary, Element Entries, and Labor Sources. Below these are buttons for Save, Submit, Cancel this document, Log, Reassign, and a set of arrow navigation buttons.

The screenshot shows the 'General Assignment Information' form, which is split into two columns: 'Current' and 'Proposed'.

Field	Current	Proposed
Assignment Category	01 Regular FT	
Status	Active Assignment	
Expected Return Date		
Organization	111200000 Bartow Arena Operatio	
Location	Bham Main Campus	
Position	111200000.00101.031001	
Job	MS316E1.Facilities Coord I	
Grade	W.G11	
Payroll Group	Staff 12	
Timecard Dist Number		
Timekeeping Method		
Timekeeping Organization		
Comments		

At the bottom of the form are buttons for Salary, Labor Sources, Element Entries, Return to Previous Form, and Save.

1. Click in the **LOCATION** field to change the location.
2. If this is a biweekly assignment, enter the employee's timekeeping information.
 - a. If your organization has designated several timekeeper approvers, the Workflow Officer for your organization may have assigned Timecard Distribution Numbers to each timekeeper. If your timekeepers have these numbers, enter the

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- timecard distribution number** of the person to whom this employee's timesheet should be distributed to in the **TIMECARD DIST NUMBER** field.
- 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.
 - If the timekeeping organization is different from the appointing organization, enter the **organization** in the **TIMEKEEPING ORGANIZATION** field or select it from the LOV.
- If this is a monthly assignment, leave the above three fields blank.
 - Click the **SAVE** button at the bottom of the form, then click on the **RETURN TO PREVIOUS FORM**.

Updating Salary Information

To change the **FTE** information, click on the **SALARY** button. The **SALARY** button is located on the **ACT MAIN FORM** and on the **ASSIGNMENT** form.

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

Document Reason	DATA CHANGE	Document Number	292779
Effective Date	16-AUG-2007	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	DATA CHANGE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Example, Hethe	Gender	Male
Identification Number	1112222	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	2
Latest Hire Date	14-NOV-1994	Total Annual Salary	xx,xxx.xx
Date of Birth	25-DEC-1955	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1112222	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	111200000 Bartow Arena Oj
Job	MS316E1.Facilities Coord I	Position	111200000.00101.031001
FTE	1	Primary	Y
Assignment Salary	xx,xxx.xx	Payroll	Monthly

Navigation buttons: Person, Address, Assignment, Salary, Element Entries, Labor Sources

Comments: [Empty text box]

Buttons: Person Data, Address, Assignment, **Salary** (highlighted with a red box), Element Entries, Labor Sources

Bottom buttons: Save, Submit, Cancel this document, Log, Reassign, <<, <, >, >>, *

After clicking on the **SALARY** button the following **ERROR** will display.



Note: This error is to inform you, **SALARY COMPONENTS** are not available for change when using the **DATA CHANGE** document reasons. Click **OK**.

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Component Reasons	Reason	Change Value	Change %	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Change value = Difference in rate of pay.
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Use the down arrow to create multiple records.				

	Current	Proposed	
Assignment Salary	<input type="text" value="51,973.92"/>	<input type="text"/>	
Assignment Rate Pay	<input type="text" value="4,331.16"/>	<input type="text"/>	
FTE	<input type="text" value="1.00"/>	<input type="text"/>	
Hosp Calc Code	<input type="text"/>	<input type="text"/>	
Premium Plan	<input type="text" value="NA"/>	<input type="text"/>	
Salary Basis	<input type="text" value="Salary"/>	<input type="text"/>	
Payroll	<input type="text" value="Monthly"/>	<input type="text"/>	
Outside Income Source	<input type="text"/>	<input type="text"/>	
Outside Income	<input type="text"/>	<input type="text"/>	(Annual)
CFB Code	<input type="text"/>	<input type="text"/>	
Comments	<input type="text"/>		

1. Enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.0 and 1.0.
2. Enter comments, if applicable, in the **COMMENTS** field.
3. Click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button.

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Submitting the Data Change Document

1. Click the **ATTACHMENTS** checkbox on the **ACT MAIN FORM** if attachments are being sent to HRM Records Administration.

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: DATA CHANGE; Effective Date: 16-AUG-2007; Requestor Name: HALEY; Document Number: 292779; Document Status: OPEN; Workflow Type: DATA CHANGE; Submit Date: (empty).
- Attachments:** Attachments; Received.
- Person Data:** Name: Example, Hethe; Gender: Male; Identification Number: 1112222; Ethnic Origin: White / Non Hispanic; SSN: (empty); Total Active Assignments: 2; Latest Hire Date: 14-NOV-1994; Total Annual Salary: xx,xxx.xx; Date of Birth: 25-DEC-1955; Prior UAB Service.
- Assignment Data:** Assignment Number: 1112222; Assignment Status: Active Assignment; Assignment Category: 01 Regular FT; Organization: 111200000 Bartow Arena Oj; Job: MS316E1.Facilities Coord I; Position: 111200000.00101.031001; FTE: 1; Primary: Y; Assignment Salary: xx,xxx.xx; Payroll: Monthly.
- Checkboxes:** Person; Address; Assignment; Salary; Element Entries; Labor Sources.
- Comments:** (empty text area).
- Navigation Buttons:** Person Data (selected), Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

2. Click on the **SUBMIT** button, for more details on submitting an ACT document, [click here](#). (*Part Six: Submitting a New Hire Document*).

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