

Appoint, Change, Terminate (ACT) Documentation Using Data Inquiry

DATA INQUIRY is an overview of the employee's **Personal, Assignment, Salary** and **Labor Source** information as it appears in the Administrative Systems database.

Using the **DATA INQUIRY** button and a **historical effective date**, a Requestor can view an employees' information on a specific date in history. The starting history effective dates are 21-SEP-2003 for biweekly paid employees and 01-OCT-2003 for monthly paid employees.

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

When you click on the **DATA INQUIRY** button from the **FIND WINDOW**, you will see a form similar to the one below. The **ACT MAIN FORM** is a brief overview of the employee's **PERSON DATA INFORMATION** and **ASSIGNMENT DATA INFORMATION** as it appears in the Administrative Systems at a specific point in time. Note the document information at the top is empty and the buttons at the bottom are not available. This indicates that you are looking at employee information not a specific document.

The **DATA INQUIRY ACT MAIN FORM** contains six forms available for viewing; **PERSON DATA, ADDRESS, ASSIGNMENT, SALARY, ELEMENT ENTRIES AND LABOR SOURCE**. An overview of each form is given below, along with a brief description of the information displayed in each field.

The screenshot shows the 'ACT Main Form' window. At the top, there are fields for Document Reason, Effective Date, Requestor Name, Document Number, Document Status, Workflow Type, and Submit Date. Below this is a section for 'Person Data' with fields for Name (Johnson, Debra W), Gender (Female), Identification Number (1010349), Ethnic Origin (White / Non Hispanic), SSN (418-90-1912), Total Active Assignments (1), Latest Hire Date (18-NOV-1996), Total Annual Salary (52,918.80), and Date of Birth (13-JUL-1956). There is also a checkbox for 'Prior UAB Service'. Below that is the 'Assignment Data' section with fields for Assignment Number (1010349), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (320000000 School of Dentis), Job (AC108E1.Exec Asst I), Position (320000000.52201.031001), FTE (1), Primary (Y), Assignment Salary (52,918.80), and Payroll (Monthly). At the bottom, there are checkboxes for Person, Address, Assignment, Salary, Element Entries, and Labor Sources. A 'Comments' field is present, followed by buttons for Person Data, Address, Assignment, Salary, Element Entries, and Labor Sources. At the very bottom are buttons for Save, Submit, Cancel this document, Log, and Reassign.

Field	Value
Document Reason	
Effective Date	
Requestor Name	
Document Number	
Document Status	
Workflow Type	
Submit Date	
Attachments	<input type="checkbox"/>
Received	<input type="checkbox"/>
Person Data	
Name	Johnson, Debra W
Gender	Female
Identification Number	1010349
Ethnic Origin	White / Non Hispanic
SSN	418-90-1912
Total Active Assignments	1
Latest Hire Date	18-NOV-1996
Total Annual Salary	52,918.80
Date of Birth	13-JUL-1956
Prior UAB Service	<input type="checkbox"/>
Assignment Data	
Assignment Number	1010349
Assignment Status	Active Assignment
Assignment Category	01 Regular FT
Organization	320000000 School of Dentis
Job	AC108E1.Exec Asst I
Position	320000000.52201.031001
FTE	1
Primary	Y
Assignment Salary	52,918.80
Payroll	Monthly
Person	<input type="checkbox"/>
Address	<input type="checkbox"/>
Assignment	<input type="checkbox"/>
Salary	<input type="checkbox"/>
Element Entries	<input type="checkbox"/>
Labor Sources	<input type="checkbox"/>
Comments	
Person Data	Address
Assignment	Salary
Element Entries	Labor Sources
Save	Submit
Cancel this document	Log
Reassign	

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Viewing the Person Data (Data Inquiry) Form

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

The **PERSON DATA (DATA INQUIRY) FORM** contains five tabbed areas of information: **PERSONAL**, **EMPLOYMENT**, **DIRECTORY**, **LICENSE**, and **TERMINATION**.

Person Data (Data Inquiry)

Full Name **Johnson, Debra W** Identification Number **1010349** Assignment Number **1010349**

Latest Hire Date **18-NOV-1996** Service Date **18-NOV-1996**
Person Type **Employee**

Personal Employment Directory License Termination

Last Name **Johnson** SSN
First Name **Debra** Date of Birth **13-JUL-1956**
Middle Name **W** Gender **Female**
Suffix Email Address **workflow@uab.edu**
Title **Ms.**

Address Schools and Colleges Return to Previous Form

1. The **PERSONAL DATA** tab displays the employee's:

- **LAST NAME**
- **FIRST NAME**
- **MIDDLE NAME**
- **SUFFIX** (example: MD, OD, DMD)
- **TITLE** (example: Mr., Ms)
- **SOCIAL SECURITY NUMBER**
- **DATE OF BIRTH**
- **GENDER**
- **EMAIL ADDRESS**

Personal Employment Directory License Termination

Last Name **Johnson** SSN
First Name **Debra** Date of Birth **13-JUL-1956**
Middle Name **W** Gender **Female**
Suffix Email Address **workflow@uab.edu**
Title **Ms.**

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2. The **EMPLOYMENT** tab displays the employee's:

- **ETHNIC ORIGIN**
- **I-9 INFORMATION**
- **VETERAN STATUS** (if applicable)
- **VISA** data (if applicable)

Personal	Employment	Directory	License	Termination
Ethnic Origin	White / Non Hispanic	Visa Type		<input style="width: 100%;" type="text"/>
I-9 Status	Yes	Work Visa Expiration Date		
Veteran Status	<input style="width: 100%;" type="text"/>			

3. The **DIRECTORY** tab displays:

- Whether or not an employee is listed in the UAB phonebooks (paper and electronic), their job title as it should appear in the phonebooks, and name if the employee elects to be listed differently.

Personal	Employment	Directory	License	Termination	
		Alpha List	Online List	Directory Title	Directory Name
		Yes	Yes	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
		<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
		<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

- The **ALPHA LIST** refers to the UAB paper phonebook. **Yes** indicates the employee will be listed in the UAB paper phonebook. **No** indicates the employee should not be listed in the UAB paper phonebook.
- The **ONLINE LIST** refers to the UAB Electronic Phonebook located on the UAB website. This field defaults to **Yes** and cannot be changed. All UAB employees will be listed in the Electronic Phonebook.
- The **DIRECTORY TITLE** field will display if a different title other than the employee's official job title is to appear in the paper and electronic phonebooks. The **DIRECTORY TITLE** field is entered via the employee's **New Hire Document** or changed via a **Data Change Document**.
- The **DIRECTORY NAME** field is usually left blank if the employee goes by his or her name as shown in **ACT**. However, some employees may choose to be known as another name – middle name, initials, nickname, etc. The **DIRECTORY NAME** field can be entered via the employee's **New Hire Document** or changed via a **Data Change Document**.

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- The **LICENSE** tab displays information about an employee's license, certification or membership. Some UAB employees may be required to hold a license or some other type of certification for their job. If an employee has several, you can use the up and down arrows or the scroll bar to view the information.

Personal Employment Directory License Termination				
Type	Title	Number	Expiration Date	
License	REGISTERED NURSE	169382	31-DEC-2000	<input type="button" value="▲"/> <input type="button" value="▼"/> <input type="button" value="↕"/>

- The **TERMINATION** tab displays information on an employee's termination if applicable.

Personal Employment Directory License Termination				
Actual Date	<input type="text"/>	Recommendation Reason	<input type="text"/>	
Projected Last Day at Work	<input type="text"/>	Leaving Reason	<input type="text"/>	
Rehire Recommendation	<input type="text"/>			

- Click the **ADDRESS** button at the bottom of the **PERSON DATA (DATA INQUIRY)** form to view employee's home and campus information.

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Viewing the Address and Phones (Current Data Inquiry) Form

The **ADDRESS AND PHONES (CURRENT DATA INQUIRY) FORM** displays the employee's:

- Home address
- Campus address
- If an employee has an International Address a checkmark will display in the **INTERNATIONAL ADDRESS CHECKBOX**.
- Home and campus phone numbers, as well as, any other phone numbers UAB may have on file for the employee – work fax, pager, cell phone and campus secondary.

The screenshot shows the 'Address and Phones (Current Data Inquiry)' form. At the top, it displays the employee's Full Name as 'Johnson, Debra W.', Identification Number as '1010349', and Assignment Number as '1010349'. The 'ADDRESS' section includes fields for Address Type (Home), Primary Flag (Y), Address Line1 (1424 13th Ter), City (Pleasant Grove), State (AL), and Zip Code (35127). There is an unchecked checkbox for 'International Address'. Below the address section is a 'PHONES' table with columns for Phone Type, Phone Number, and Date From. The 'Work Fax' row is circled in red. A 'Return to Previous Form' button is located at the bottom of the form.

Phone Type	Phone Number	Date From
Work Fax	(205) 975-6544	02-OCT-2005
Home	(205) 744-9574	18-NOV-1996
Campus Primary	(205) 934-4720	18-NOV-1996

Use the up and down arrows to scroll between the **home, campus primary, and campus secondary**. If several phone numbers are in the system, you can use the up and down arrows or the scroll bar to view them as well.

This screenshot shows the 'ADDRESS' section of the form with 'Campus Primary' selected. The fields are: Address Type (Campus Primary), Primary Flag (N), Building (SDB), Room (406), Address Line3 (School Of Dentistry), City (Birmingham), State (AL), and Zip Code (35294-0007). There is an unchecked checkbox for 'International Address'.

Clicking the **RETURN TO PREVIOUS FORM** button at the bottom of the **ADDRESS AND PHONES (DATA INQUIRY) FORM** will return you to **PERSON DATA (DATA INQUIRY) FORM**.

Click on the **SCHOOLS AND COLLEGES** button located at the bottom of the **PERSON DATA (DATA INQUIRY) FORM** to view information pertaining to the employee's educational history.

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Viewing the Schools and Colleges Attended (Data Inquiry) Form

The **SCHOOLS AND COLLEGES ATTENDED (DATA INQUIRY) FORM** displays information about the employee's educational history:

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
High School/GED or Grade School	101 High School Graduate	01-JAN-1974	HD		

Use scroll bar to view discipline information

Return to Previous Form

- **SCHOOL OR COLLEGE** – displays the name of the school or college attended.
- **DEGREE NAME** – degree name and level earned; ranging from Not Specified and First Grade through Ph.D. and Doctorate.
- **DEGREE DATE** – actual date the degree was earned.
- **TYPE** – **OD (Other Degree)** **HD (Highest Degree)**. There can only be one highest degree. All others will be OD.
- **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE AND DEGREE DISCIPLINE** – displays for faculty appointments only.

If an employee has several schools and colleges listed, use the up and down arrows or the scroll bar to view the list.

Click on the Return to Previous Form at the bottom of the **SCHOOLS AND COLLEGES ATTENDED (DATA INQUIRY) FORM** to return to the **PERSON DATA (DATA INQUIRY) FORM**.

Click on the **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA (DATA INQUIRY) FORM** to return to the **ACT MAIN FORM**.

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Viewing the Assignment (Data Inquiry) Form

The **ASSIGNMENT (DATA INQUIRY) FORM** displays information about the employee's organization, position, job, grade and payroll group as well as other information pertaining to the employee's assignment:

The screenshot shows a web-based form titled "Assignment (Data Inquiry)". The form is divided into several sections:

- Employee Information:** Full Name: Johnson, Debra W.; Identification Number: 1010349; Assignment Number: 1010349.
- Effective Dates and Status:** Effective Date From: 01-OCT-2005; Effective Date To: 31-DEC-4712; Primary: Y.
- Shift and Effort Information:** Shift Differential Code: NA; Grandparented: (empty); Effort Report Eligible: No.
- General Assignment Information:**
 - Assignment Category: 01 Regular FT; Status: Active Assignment; Job: AC108E1.Exec Asst I; Grade: W.G14; Payroll Group: Staff 12.
 - Expected Return Date: (empty); Organization: 320000000 School of Dentistry Dea; Location: Bham Main Campus; Position: 320000000.52201.031001.
 - Timecard Dist Number: (empty); Timekeeping Method: (empty); Timekeeping Organization: (empty).
- Navigation Buttons:** Salary, Labor Sources, Element Entries, Return to Previous Form.

- **EFFECTIVE DATE FROM** – effective date of the assignment being viewed.
- **EFFECTIVE DATE TO** – End date of assignment being viewed.
- **PRIMARY** – **Y** displays if the assignment being viewed is the employees Primary assignment. **N** displays if the assignment being viewed is an additional assignment.
- **SHIFT DIFFERENTIAL CODE** – displays premium code if applicable; primarily for hospital employees.
- **GRANDPARENTED** -- displays **Y** if the employee is considered a Grandparented employee.
- **EFFORT REPORT ELIGIBLE** – displays **Yes** if employee receives Effort Reports, displays **No** if employee does not receive Effort Reports.
- **ASSIGNMENT CATEGORY** – an employee's employment status for the assignment being viewed. For a detailed description of approved UAB Assignment Categories (Employment Status), [click here](#). (You and UAB handbook Section 2, 2.1)

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- **STATUS** – displays employee's current assignment status.

General Assignment Information	
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	

Note: if the employee is currently in a Leave status, the status field will display similar to the example below).

General Assignment Information	
Assignment Category	12 Three 12-Hour Shifts
Status	Leave With Pay
Expected Return Date	12-FEB-2005

- **EXPECTED RETURN DATE** – displays only when an employee is in a **Leave** status. Reflects the date the employee is due to return from leave.
- **ORGANIZATION** – displays the Organization the employee is affiliated with.

General Assignment Information			
Assignment Category	01 Regular FT	Job	AC108E1.Exec Asst I
Status	Active Assignment	Grade	W.G14
Expected Return Date		Payroll Group	Staff 12
Organization	320000000 School of Dentistry Dea	Timecard Dist Number	
Location	Bham Main Campus	Timekeeping Method	
Position	320000000.52201.031001	Timekeeping Organization	

- **LOCATION** – displays the location of the Organization.
- **POSITION** – displays the position number the employee occupies within a specific organization.

Position **320000000.52201.031001**

The first part of the number, up to the first period, is the **organization number**. The second part of the number is the **position code** assigned by Compensation for that particular position. The third number is a **six-digit date**. This is the date that the position was created or changed.

- **JOB** – displays the job title assigned to the specified position code.
- **GRADE** -- displays the grad assigned to the specified position code.
- **PAYROLL GROUP** – displays the employee's payroll group (Faculty 12, Staff 12, Faculty 9, etc.)
- **TIMECARD DIST. NUMBER** – displays the timekeeping approver's number if one has been assigned for the specified organization. If the organization in which the employee is affiliated does not have timekeeping approvers, this field will be blank.
- **TIMEKEEPING METHOD** – will display only when an employee is paid biweekly. (TEL – University Employees, TAMS – Hospital Employees, Design Build – Design Build Services Employees)
- **TIMEKEEPING ORGANIZATION** -- will be blank unless the Timekeeping Organization is different from the Organization shown in the Organization field.

Timekeeping Method	TEL
Timekeeping Organization	090000000 Athletics Department Adr

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Viewing the Salary (Data Inquiry) Form

The **SALARY (DATA INQUIRY) FORM** displays the employee's salary information as it appears in the Administrative Systems. If the salary does not appear to be correct, check to make sure the correct assignment was selected.

The **SALARY (DATA INQUIRY) FORM** displays the employee's:

The screenshot shows a web form titled "Salary (Data Inquiry)". At the top, there are three input fields: "Full Name" with the value "Johnson, Debra W.", "Identification Number" with "1010349", and "Assignment Number" with "1010349". Below this is a larger section with several rows of data: "Salary" (58,210.68), "Rate Of Pay" (4,850.89), "FTE" (1), "CFB Code" (GROUP B), "Hosp Calc Code" (blank), "Premium Plan" (NA), "Salary Basis" (Salary), "Payroll" (Monthly), "Outside Income Source" (blank), and "Outside Income" (0.00). At the bottom of the form is a button labeled "Return to Previous Form".

- **SALARY** – current annual salary.
- **RATE OF PAY** – monthly or hourly rate of pay based upon salary basis.
- **FTE** – Full Time Equivalency, based upon number of worked hours per week.
- **CFB CODE** – a Composite Fringe Benefit Code will display according to the employees Assignment Category. For information pertaining to CFB Code [click here.](#)
- **HOSP CALC CODE** – displays the code used to specify the shift and pay for hospital employees.
- **PREMIUM PLAN** – displays **H2** for Hospital Employees with a 017 Assignment Category. Displays H1 for Hospital Employees working in the Supplement Staffing Pool with a 04 Assignment Category. This field will be blank for University Employees.
- **SALARY BASIS** – Salary or Hourly
- **OUTSIDE INCOME SOURCE** – will be blank unless an employee receives income from either the Eye Foundation or the Veterans Administration.

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

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Viewing the Labor Sources (Data Inquiry) Form

The **LABOR SOURCES (DATA INQUIRY) FORM** displays the employee's funding source information – the account(s) from which the employee is paid. An example would be an employee who is funded from several different grants.

The screenshot shows a web application window titled "Labor Sources (Data Inquiry)". At the top, there are three input fields: "Full Name" with the value "Johnson, Debra W.", "Identification Number" with "1010349", and "Assignment Number" with "1010349". Below these is a section for "Assignment Salary" showing "58,210.68" and an "Element Name" dropdown menu. The main section is titled "Costing" and contains two tabs: "Assignment" and "Element". The "Assignment" tab is active, displaying a table with the following columns: "From Date", "To Date", "GL Account", "Project", "Task", and "%". The table has one row of data: "01-OCT-2005", an empty "To Date" field, "2100199.000.123200000.320000000.0", empty "Project" and "Task" fields, and "100". Below the table is a "Total LD %" field with the value "100". At the bottom center is a button labeled "Return to Previous Form".

- **ASSIGNMENT SALARY** – displays the employee's current annual assignment salary.
- **FROM DATE** – beginning of the current pay period.
- **TO DATE** – the ending date for a Funding Source or four a grant. It can also be the end of a pay period.
- **GL ACCOUNT** – the General Ledger account(s) information in which the employee's salary will be paid from. For information pertaining to the General Ledger Accounting Structure, [click here](#).
- **PROJECT, TASK, AWARD, ORGANIZATION (PTAO)** – the Grant Account, Task, Award and Organization in which the employee's salary will be paid from. For information pertain to the Grants Accounting Structure, [click here](#).
- **% (Percent)** – displays the percentage rate a GL Account or a PTAO string is charged for an employee's salary. Each employee's funding source percentage must equal 100%.

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

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Viewing the Element Entry (Data Inquiry)

The **ELEMENT ENTRY (DATA INQUIRY) FORM** is used to display lump sum payments made to employees in addition to their regular base pay. Examples are faculty summer pay, payment for credit course instruction, bonus or incentive payments, FIPS, retention pay, referral pay, relocation reimbursements.

Costed	Element Name	Effective Start Date	Effective End Date
<input checked="" type="checkbox"/>	Special Compensation	01-AUG-2005	31-AUG-2005
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

- **COSTED** – a checkmark appears when the labor source for a specific **ELEMENT NAME** has been changed. It is a visual indicator to the approver that changes have been made to the labor sources information.
- **ELEMENT NAME** – identifies the type or reason for additional payment.
- **EFFECTIVE START DATE** – usually the effective date of document submitted requesting additional payment, or the beginning date of the pay period in which the additional payment will be paid.
- **EFFECTIVE END DATE** -- the end date of the pay period in which the additional payment will be paid.

Clicking the **ENTRY VALUES** button will display the **ENTRY VALUES (SPECIAL COMPENSATION)** window. Displaying the \$ amount paid or hours worked depending on the element name selected.

Amount	500.00
Pay Value	
Jurisdiction	
Deduction Processing	All Deductions
Separate Check	No
Document	128124
Future 1	
Future 2	

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Close the **ENTRY VALUES (SPECIAL COMPENSATION)** window by clicking on the **(X)** located in the upper right hand corner of the window. Click the **RETURN TO PREVIOUS FORM** button located at the bottom of the **ELEMENT ENTRY (DATA INQUIRY)** form.

From the **ACT MAIN FORM** you can return to the Find Window by clicking on the flashlight



located in the tool bar. Or click on the **(X)** in the upper right hand corner of the ACT Main Form to return to your Personal Home Page.

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