

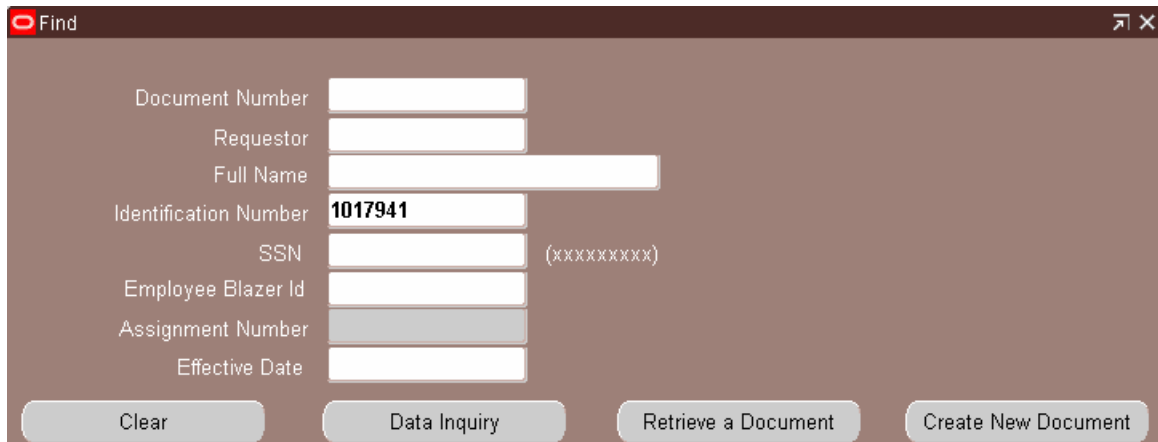
## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part One: Creating an End A Trainee Document

An End A Trainee Document is used when a Trainee with a 06 (Student) or 20 (Post Doctoral Trainee) Assignment Category terminates their assignment with UAB. This document reason will terminate ALL assignments held by the student or trainee.

UAB HR Officer → HR Transactions → ACT → Find Window

### Creating an End A Trainee Document

1. Use the **FIND** Window to locate the trainee.



Find

Document Number

Requestor

Full Name

Identification Number **1017941**

SSN  (xxxxxxxx)

Employee Blazer Id

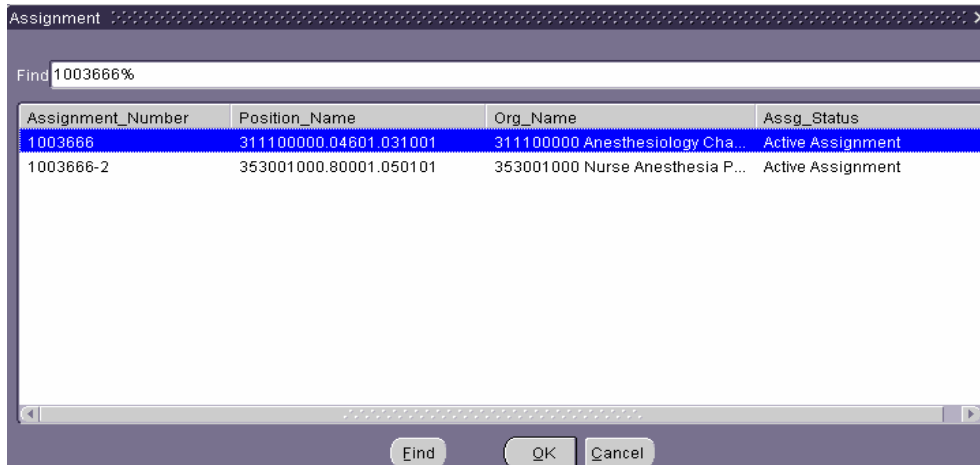
Assignment Number

Effective Date

Clear Data Inquiry Retrieve a Document Create New Document

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

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



Assignment

Find 1003666%

Assignment_Number	Position_Name	Org_Name	Assg_Status
1003666	311100000.04601.031001	311100000 Anesthesiology Cha...	Active Assignment
1003666-2	353001000.80001.050101	353001000 Nurse Anesthesia P...	Active Assignment

Find OK Cancel

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part One: Creating a End Trainee Document

- When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.

- Use the **DOCUMENT REASON LOV** to **CHOOSE END A TRAINEE** or type the words **End A Trainee** in the **DOCUMENT REASON** field. Click **OK**.

Doc_Reason	Doc_Type
BUDGET	BUDGET
CHANGE OF ASSIGNMENT CATEGORY	CHANGE
DATA CHANGE	DATA CHANGE
EDUCATION LEAVE WITH PAY	LEAVES
EDUCATION LEAVE WITHOUT PAY	LEAVES
<b>END A TRAINEE</b>	<b>TERMINATION</b>
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

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part One: Creating a End Trainee Document

- Click in the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or **type in the desired date**. Remember to use the **DD-MMM-YY** format.

ACT Main Form

Document Reason	END A TRAINEE
Effective Date	21-NOV-2006
Requestor Name	HALEY
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received

**Note: Attachments are not required for an End A Trainee document.**

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

ACT Main Form

Document Reason	END A TRAINEE	Document Number	146348
Effective Date	21-NOV-2006	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

**Person Data**

Name	Carvalho, Thiago L	Gender	Male
Identification Number		Ethnic Origin	White / Non Hispanic
SSN	423-55-1372	Total Active Assignments	1
Latest Hire Date	01-JUL-2003	Total Annual Salary	43,000.08
Date of Birth	27-OCT-1974	<input type="checkbox"/> Prior UAB Service	

**Assignment Data**

Assignment Number	1017941	Assignment Status	Active Assignment
Assignment Category	20 Post Doc Trainee	Organization	392200000 Microbiology
Job	ZZZ9.Postdoctoral Trainee	Position	392200000.58401.031001
FTE	1	Primary	Y
Assignment Salary	43,000.08	Payroll	Trainee

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

**Note: You can change the effective date of this document at this point. Once you proceed to the PERSON DATA SCREEN and press the SAVE button, you CAN NOT return to the ACT MAIN FORM and change the EFFECTIVE DATE. You will have to cancel the document and start over.**

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part Two: Entering Termination Information

All of the buttons on the ACT Main Form will appear to be open. However, the only forms you will be allowed to edit will be the Person Data form (Termination Tab ONLY) and the Address form. The information on the Termination Tab identifies the Trainee's projected last day of employment, reason for terminating and rehire eligibility.

1. Click on the **PERSON** button from the **ACT MAIN FORM**.

The screenshot shows the 'Person Data (Create New Document)' form. The 'Termination' tab is selected and circled in red. The form is divided into 'Current' and 'Proposed' sections. The 'Current' section contains the following information:

Field	Value
SSN	423-55-1372
Last Name	Carvalho
First Name	Thiago
Middle Names	L
Suffix	
Title	Dr.
Date Of Birth	27-OCT-1974
Gender	MALE

The 'Proposed' section is currently empty. The 'Document Reason' is 'END A TRAINEE', 'Document Number' is '146348', 'Document Status' is 'OPEN', and 'Effective Date' is '21-NOV-2006'. Other fields include 'Full Name' (Carvalho, Thiago L), 'Identification Number' (1017941), 'Assignment Number' (1017941), 'Latest Hire Date' (01-JUL-2003), 'Service Date' (01-JUL-2003), 'Person Type' (Trainee), and 'Email Address' (workflow@uab.edu). The 'Comments' field is empty. At the bottom, there are buttons for 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

2. Click on the **TERMINATION** Tab.

The close-up screenshot shows the 'Termination' tab with the following data:

Field	Current	Proposed
Actual Date		21-NOV-2006
Projected Last Day of Work		
Leaving Reason		
Rehire Recommendation	Yes	Yes
Recommendation Reason		

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part Two: Entering Termination Information

3. Click in the **PROJECTED LAST DAY OF WORK** field, choose the effective date from the Calendar LOV or type in *the desired date*.

**Note: The Actual Date is pulled from the Document Effective Date. This can be a future date in order to pay the Trainee through a designated pay period. The Projected Last Day of Work will be the Trainee's actual last day of working at UAB.**

4. Click in the **LEAVING REASON** field; select *the appropriate reason* from the LOV. For information on Reasons for Termination, [click here](#).

**Note: Before submitting an INVOLUNTARY termination, contact Personnel Relations. Personnel Relations will evaluate the circumstances and recommend the appropriate Leaving Reason to select.**

5. Click in the **REHIRE RECOMMENDATION** field.
6. This field will default to **Yes**. However, if your organization would not rehire this individual, select **No** from the LOV.
7. Click in the **RECOMMENDATION REASON** field and explain why your department would not be willing to rehire this individual.

**Note: The Rehire Recommendation applies only to your organization. It does not apply to the entire University.**

The screenshot shows a web-based form for entering termination information. At the top, there are tabs for 'Personal', 'Employment', 'Directory', 'License', and 'Termination'. The 'Termination' tab is active. Below the tabs, there are two columns: 'Current' and 'Proposed'. The 'Current' column has fields for 'Actual Date', 'Projected Last Day of Work', 'Leaving Reason', 'Rehire Recommendation' (with a dropdown menu showing 'Yes'), and 'Recommendation Reason'. The 'Proposed' column has fields for 'Actual Date' (with a dropdown menu showing '21-NOV-2006'), 'Projected Last Day of Work' (with a dropdown menu showing '21-NOV-2006'), 'Leaving Reason' (with a dropdown menu showing '101 Resigned - Voluntary'), 'Rehire Recommendation' (with a dropdown menu showing 'Yes'), and 'Recommendation Reason'. Below the form fields is a 'Comments' section with a text area. At the bottom of the form, there are buttons for 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

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

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part Four: Submitting a End A Trainee Document

The Address button only needs to be completed if the Trainee's post termination address is different from what currently shows in the Administrative Systems. It is critical that the correct address and phone information be entered for post employment communications. Tax and benefit information will need to be forwarded to the correct address.

1. If the address and/or phone information is changing, click the **ADDRESS** button at the bottom of the **ACT MAIN FORM**.
2. To change the Trainee's home information, select **HOME** from the LOV in the **ADDRESS TYPE** field.

**Address and Phones (Create New Document)**

Full Name: **Carvalho, Thiago L**      Document Reason: **END A TRAINEE**  
 Identification Number: **1017941**      Document Number: **146348**  
 Assignment Number: **1017941**      Document Status: **OPEN**  
 Effective Date: **21-NOV-2006**

**Address**

	Current	End Date Current	Proposed
Address Type	<b>Home</b>	<input type="checkbox"/>	<b>Home</b>
Address Line1	<b>1340 32 ST S</b>		
Address Line2	<b>apt D1</b>		
Address Line3			
City	<b>Birmingham</b>		
State	<b>AL</b>		
Zip Code	<b>35205</b>		

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

**Phones**

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		<b>Campus Primary</b>	<b>(205) 934-1875</b>	<b>01-JUL-2003</b>
<input type="checkbox"/>		<b>Work Fax</b>	<b>(205) 934-6557</b>	<b>01-JUL-2003</b>
<input type="checkbox"/>				

Use the down arrow to create multiple records.

International Address

Comments:

Return to Previous Form      Save

3. Click in the **ADDRESS LINE1** field; enter *the Trainee's street address*. There are two more address lines available, if needed.
4. 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 Trainee lives*, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.
5. Highlight the *correct zip code range* for the city and county in which the Trainee lives. Click **OK**. This will populate the **CITY AND STATE** field.

## Appoint, Change, Terminate (ACT) Documentation End A Trainee – Part Two: Entering Termination Information

6. Click in the **ZIP CODE** field, type the *correct Zip Code*. Click **SAVE**.

Address		Current	End Date	Current	Proposed
Address Type	<input type="text" value="Home"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text" value="Home"/>
Address Line1	<input type="text" value="1340 32 ST S"/>				<input type="text" value="2222 45th St S"/>
Address Line2	<input type="text" value="apt D1"/>				<input type="text"/>
Address Line3	<input type="text"/>				<input type="text"/>
City	<input type="text" value="Birmingham"/>				<input type="text" value="Birmingham"/>
State	<input type="text" value="AL"/>				<input type="text" value="AL"/>
Zip Code	<input type="text" value="35205"/>				<input type="text" value="35205"/>

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

**Note: If the Trainee 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.**

International Address

Comments

7. If the Trainee's home phone number is changing, click once in the Type field of the **PHONES** region.

Phones		Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>			<b>Campus Primary</b>	<input type="text" value="(205) 934-1875"/>	<input type="text" value="01-JUL-2003"/>
<input type="checkbox"/>	<input type="checkbox"/>			<b>Work Fax</b>	<input type="text" value="(205) 934-6557"/>	<input type="text" value="01-JUL-2003"/>
<input type="checkbox"/>	<input type="checkbox"/>			<b>Home</b>	<input type="text" value="(205) 998-6589"/>	<input type="text" value="21-NOV-2006"/>

Use the down arrow to create multiple records.

8. Click on the home phone number in the **PHONE NUMBER** section. Enter the *Trainee's home phone number without the dashes*. This information must be entered in ten digits.
9. Click on the home date in the **DATE FROM** section. Enter *the effective date of the termination document*.

Phones		Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>			<b>Campus Primary</b>	<input type="text" value="(205) 934-1875"/>	<input type="text" value="01-JUL-2003"/>
<input type="checkbox"/>	<input type="checkbox"/>			<b>Work Fax</b>	<input type="text" value="(205) 934-6557"/>	<input type="text" value="01-JUL-2003"/>
<input type="checkbox"/>	<input type="checkbox"/>			<b>Home</b>	<input type="text" value="(205) 998-6589"/>	<input type="text" value="21-NOV-2006"/>

Use the down arrow to create multiple records.

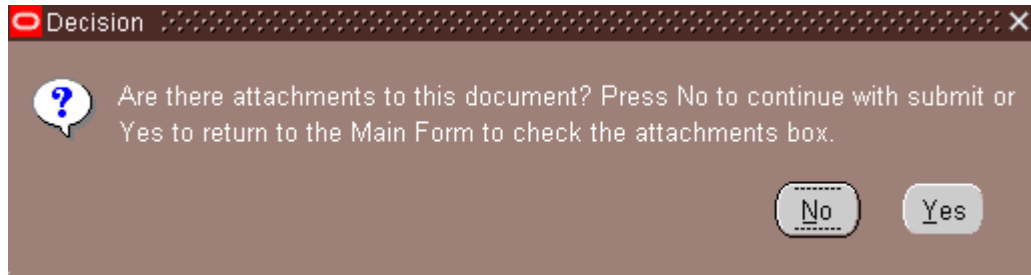
**Appoint, Change, Terminate (ACT) Documentation**  
**End A Trainee – Part Two: Entering Termination Information**

10. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form.  
Comments entered here will appear on the **ACT MAIN FORM**.
11. Click on the **SAVE** button.
12. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

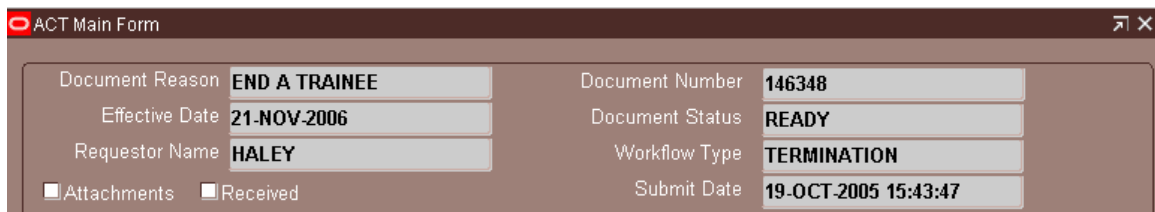
## Appoint, Change, Terminate (ACT) Documentation Termination -- Part Four: Submitting a Termination Document

The HR Officer verifies that all information is correct and the document is ready to be submitted. The HR Officer submits the Termination document for approval. At that point, the document status changes from Open to Ready and enters the approval path.

1. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



3. Click **NO** to continue since Attachments are not required for an End A Trainee Document.
4. The **DOCUMENT STATUS** changes to **READY**.



A screenshot of the 'ACT Main Form' window. The title bar reads 'ACT Main Form'. The form contains the following fields:

Document Reason	END A TRAINEE	Document Number	146348
Effective Date	21-NOV-2006	Document Status	READY
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	19-OCT-2005 15:43:47

**Note:** Once the Document Status changes to **READY**, all fields on all the forms will turn gray (inquiry or ready only).

10. Once the **TERMINATION** 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**.

[RETURN TO TOP](#)