

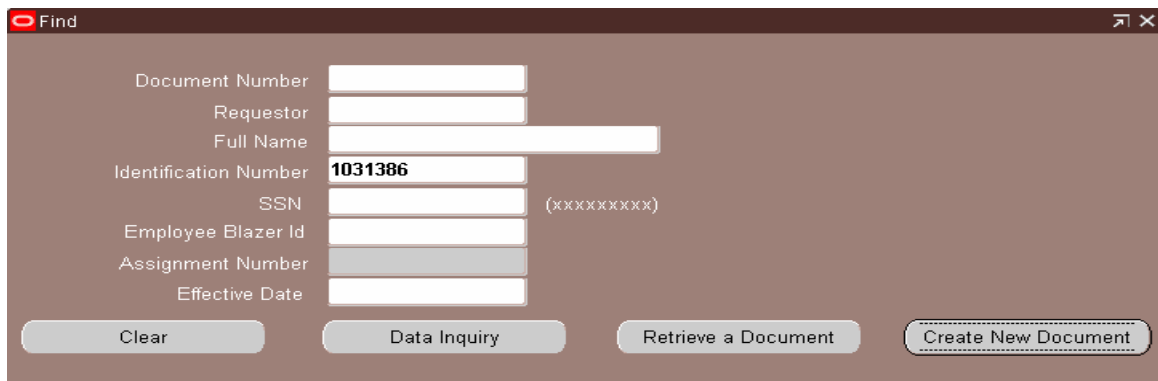
Appoint, Change, Terminate (ACT) Documentation End A Volunteer – Part One: Creating End A Volunteer Document

An End A Volunteer Document is used when an individual with a 60 (Volunteer) Assignment Category terminates their assignment with UAB. This document reason will terminate the Volunteer from the Administrative Systems.

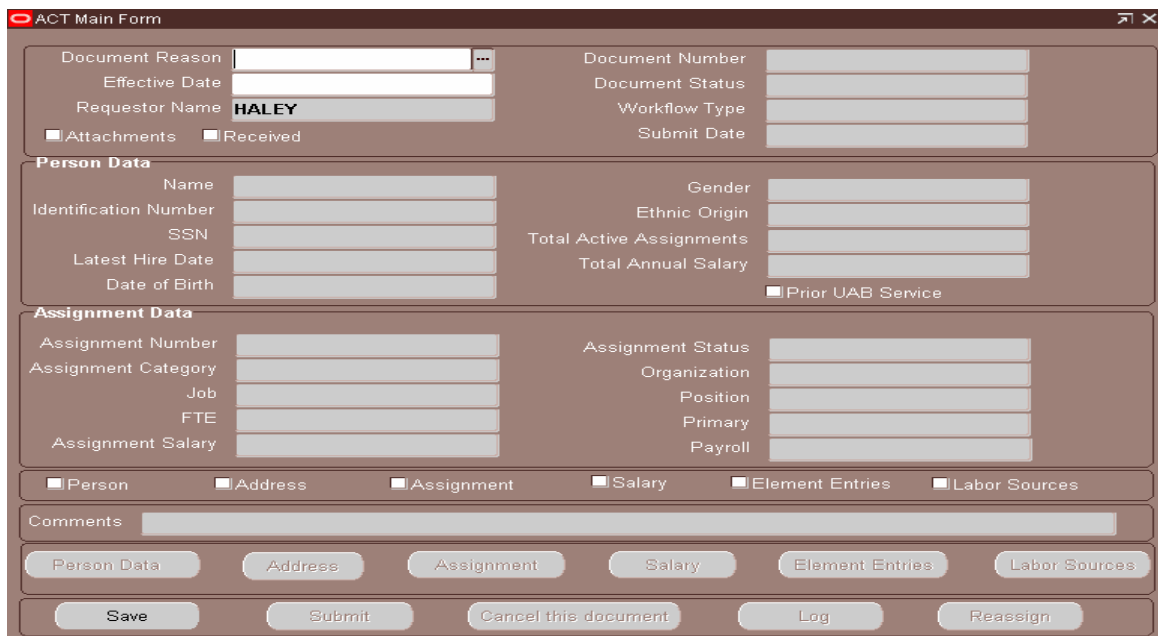
UAB HR Officer → HR Transactions → ACT → Find Window

Creating an End A Volunteer Document

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

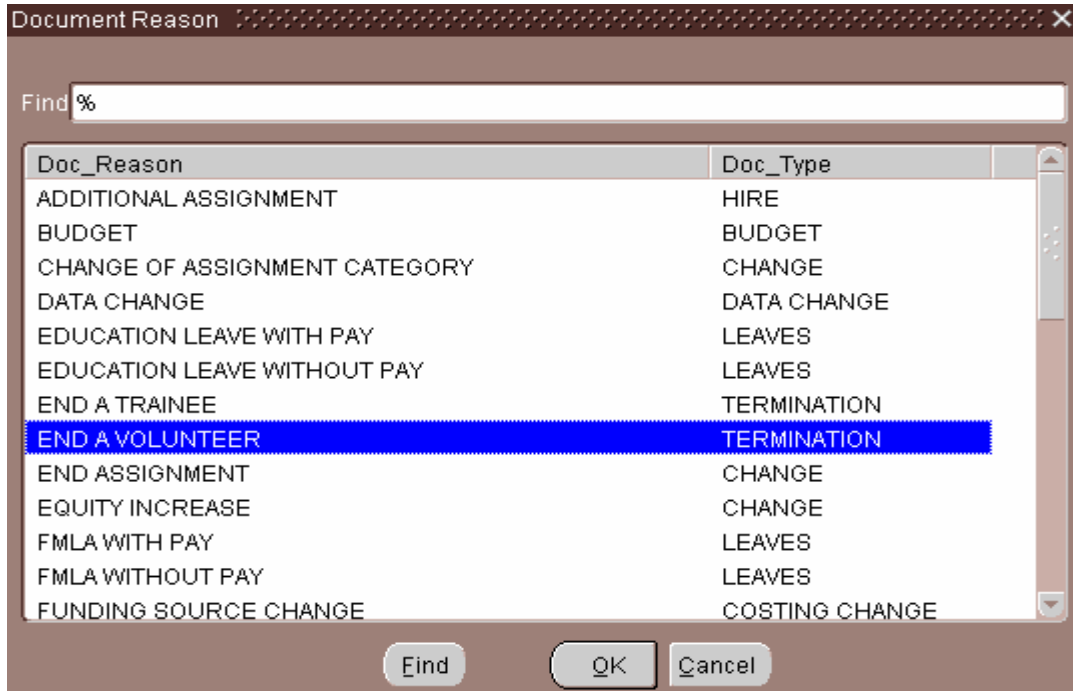


2. Click on the **CREATE NEW DOCUMENT** button.
3. When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.



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

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



- 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.

The screenshot shows a form with the following fields and values:

- Document Reason: **END A VOLUNTEER**
- Effective Date: **25-OCT-2005** (with a calendar icon to the right)
- Requestor Name: **HALEY**
- Attachments:
- Received:

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

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

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

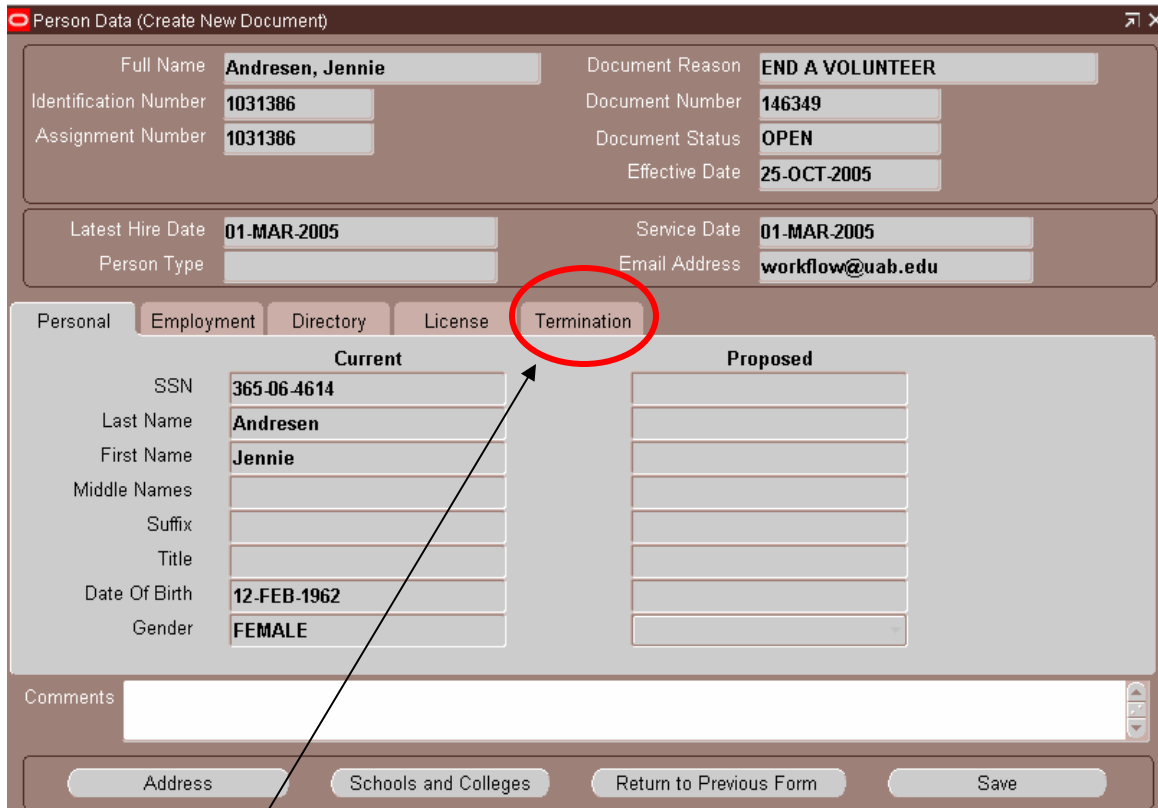
Document Reason		Document Number	
Document Reason	END A VOLUNTEER	Document Number	146349
Effective Date	25-OCT-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	
Person Data			
Name	Andresen, Jennie	Gender	Female
Identification Number	1031386	Ethnic Origin	White / Non Hispanic
SSN	365-06-4614	Total Active Assignments	1
Latest Hire Date	01-MAR-2005	Total Annual Salary	.00
Date of Birth	12-FEB-1962	<input type="checkbox"/> Prior UAB Service	
Assignment Data			
Assignment Number	1031386	Assignment Status	Voluntary
Assignment Category	60 Volunteer	Organization	311652400 Ped - General Pr
Job	0140.Clin Asst Prof	Position	311652400.90201.050101
FTE		Primary	Y
Assignment Salary	.00	Payroll	
<input type="checkbox"/> Person <input type="checkbox"/> Address <input type="checkbox"/> Assignment <input type="checkbox"/> Salary <input type="checkbox"/> Element Entries <input type="checkbox"/> Labor Sources			
Comments			
<input type="button" value="Person Data"/> <input type="button" value="Address"/> <input type="button" value="Assignment"/> <input type="button" value="Salary"/> <input type="button" value="Element Entries"/> <input type="button" value="Labor Sources"/>			
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel this document"/> <input type="button" value="Log"/> <input type="button" value="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 Volunteer – 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 Volunteer'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 highlighted with a red circle. An arrow points from the 'Termination' tab to the 'TERMINATION Tab' in the next step. The form contains the following data:

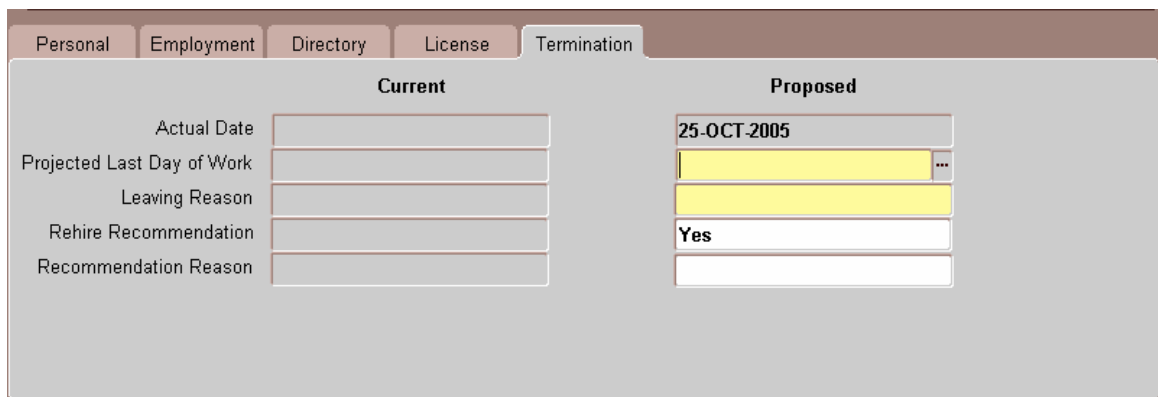
Full Name	Andresen, Jennie	Document Reason	END A VOLUNTEER
Identification Number	1031386	Document Number	146349
Assignment Number	1031386	Document Status	OPEN
		Effective Date	25-OCT-2005
Latest Hire Date	01-MAR-2005	Service Date	01-MAR-2005
Person Type		Email Address	workflow@uab.edu

Below the tabs, there are two columns: 'Current' and 'Proposed'. The 'Current' column contains the following data:

SSN	365-06-4614
Last Name	Andresen
First Name	Jennie
Middle Names	
Suffix	
Title	
Date Of Birth	12-FEB-1962
Gender	FEMALE

The 'Proposed' column is currently 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 screenshot shows the 'Person Data (Create New Document)' form with the 'Termination' tab selected. The 'Current' and 'Proposed' columns are visible. The 'Proposed' column contains the following data:

Actual Date	25-OCT-2005
Projected Last Day of Work	
Leaving Reason	
Rehire Recommendation	Yes
Recommendation Reason	

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

- 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. The Projected Last Day of Work will be the Volunteer's actual last day of working at UAB.

- 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.

- Click in the **REHIRE RECOMMENDATION** field.
- This field will default to **Yes**. However, if your organization would not rehire this individual, select **No** from the LOV.
- 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 five empty input fields for 'Actual Date', 'Projected Last Day of Work', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. The 'Proposed' column has five input fields with the following values: '25-OCT-2005', '25-OCT-2005', '101 Resigned - Voluntary', 'Yes', and an empty field. Below the columns is a 'Comments' section with a text area and a scroll bar. At the bottom, there are four buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

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

Appoint, Change, Terminate (ACT) Documentation End A Volunteer – Part Three: Changing Address Information

The Address button only needs to be completed if the Volunteer'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 Volunteer's home information, select **HOME** from the LOV in the **ADDRESS TYPE** field.

3. Click in the **ADDRESS LINE1** field; enter *the Volunteer'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 Volunteer 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 Volunteer lives. Click **OK**. This will populate the **CITY AND STATE** field.

Appoint, Change, Terminate (ACT) Documentation End A Volunteer – Part Three: Changing Address Information

6. 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.

The screenshot shows a form section with a checkbox labeled "International Address" which is currently unchecked. Below the checkbox is a text input field labeled "Comments". The entire section has a light yellow background, indicating that the "International Address" checkbox is selected or about to be selected.

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

The screenshot shows a table titled "Phones" with columns: "Delete Current", "Type", "Phone Number (xxxxxxxxxx)", and "Date From". There are three rows. The first row has "Campus Primary", "(205) 934-4531", and "01-MAR-2005". The second row has "Home", "(205) 978-0628", and "01-MAR-2005". An arrow points to the "Home" text in the "Type" column of the second row. Below the table is the text: "Use the down arrow to create multiple records."

Delete Current	Type	Phone Number (xxxxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 978-0628	01-MAR-2005
<input type="checkbox"/>			

8. Click on the home phone number in the **PHONE NUMBER** section. Enter the **Volunteer'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 document**.

The screenshot shows the same "Phones" table as in the previous image. In this image, the second row (the "Home" row) is highlighted in yellow. An arrow points to the phone number "(205) 666-9999" in the "Phone Number" column of this row. Below the table is the text: "Use the down arrow to create multiple records."

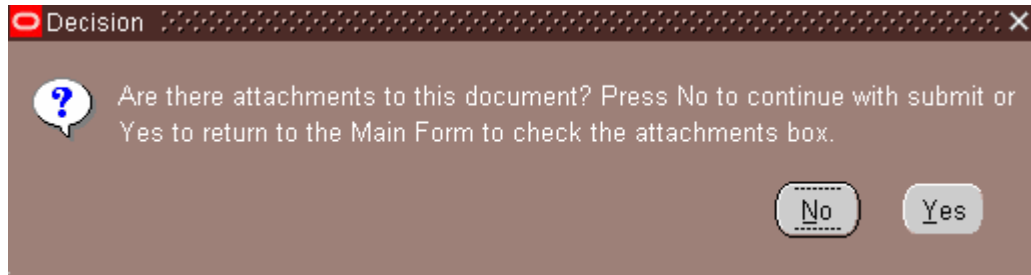
Delete Current	Type	Phone Number (xxxxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 666-9999	25-OCT-2005
<input type="checkbox"/>			

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**.

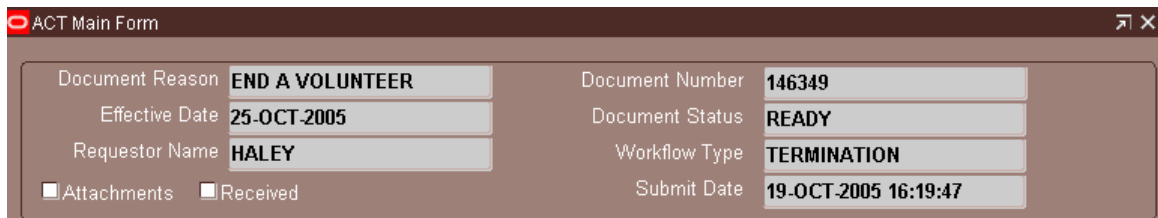
Appoint, Change, Terminate (ACT) Documentation End A Volunteer - Part Four: Submitting a End A Volunteer Document

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 Volunteer 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 VOLUNTEER	Document Number	146349
Effective Date	25-OCT-2005	Document Status	READY
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	19-OCT-2005 16:19:47

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**.

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