

Appoint, Change, Terminate (ACT) Documentation New Hire -- Part One: Creating a New Hire Document

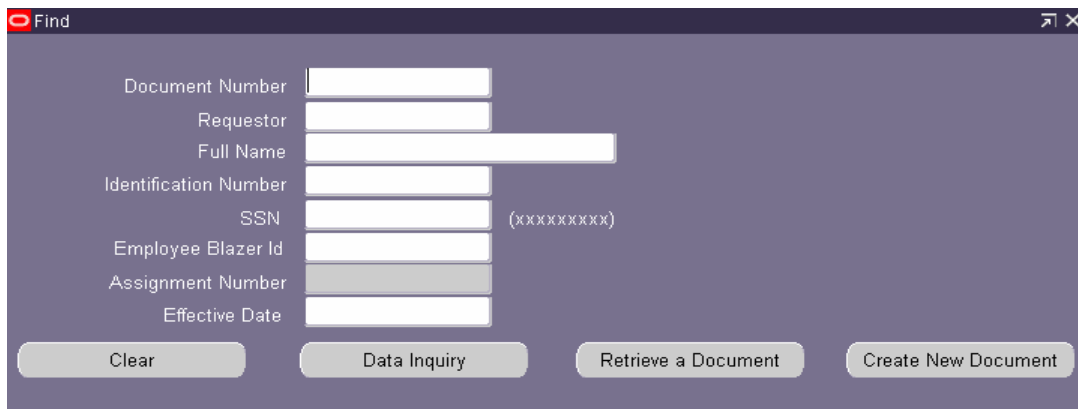
The New Hire ACT Document is completed by the HR Officer to **appoint** all **new employees** who have **never** been paid for worked hours or affiliated with UAB in an active employee status.

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

The information entered on the New Hire document provides the data needed for the employee to be paid. It also creates the official personnel record of that employee. 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 employee in front of you and that you complete it in sequential order

Creating a New Hire 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"/>

Buttons at the bottom: Clear, Data Inquiry, Retrieve a Document, Create New Document

Appoint, Change, Terminate (ACT) Documentation New Hire – Part One: Creating a New Hire Document

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. The **DOCUMENT REASON** window displays. Select **NEW HIRE** and click **OK**.

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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- Click in the **ATTACHMENTS** checkbox; a check mark now appears which indicates attachments **will be** accompanying the New Hire document. For a list of **Attachments** to accompany a **New Hire** document, [click here](#).

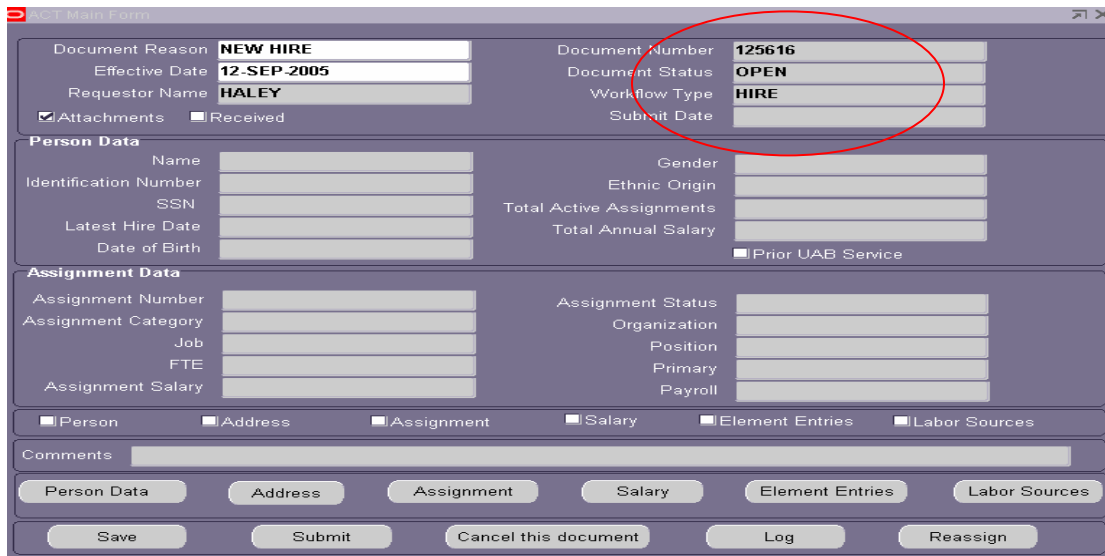


ACT Main Form

Document Reason	NEW HIRE
Effective Date	12-SEP-2005
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

- Click **SAVE** at the bottom of the form. The system will assign a **Document Number** and the **DOCUMENT STATUS** is now **OPEN**.

BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE NEW HIRE DOCUMENT. You will not be able to locate the new employee by their name, social security number, or employee ID number until the New Hire document has entered **COMPLETE** status.



ACT Main Form

Document Reason	NEW HIRE	Document Number	125616
Effective Date	12-SEP-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name		Gender	
Identification Number		Ethnic Origin	
SSN		Total Active Assignments	
Latest Hire Date		Total Annual Salary	
Date of Birth		<input type="checkbox"/> 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

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.

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

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

The Person Data form contains the demographic information and other employee data that is grouped into five sub forms and two buttons on the ACT form. The sub forms to be completed on a New Hire 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' interface. At the top, there are fields for Document Reason (NEW HIRE), Effective Date (19-SEP-2005), Requestor Name (HALEY), Document Number (125665), Document Status (OPEN), Workflow Type (HIRE), and Submit Date. Below this is the 'Person Data' section with fields for Name, Gender, Identification Number, Ethnic Origin, SSN, Total Active Assignments, Latest Hire Date, Total Annual Salary, and Date of Birth. There is also a checkbox for 'Prior UAB Service'. The 'Assignment Data' section includes fields for Assignment Number, Assignment Status, Assignment Category, Organization, Job, Position, FTE, Primary, Assignment Salary, and Payroll. At the bottom, there are tabs for 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.

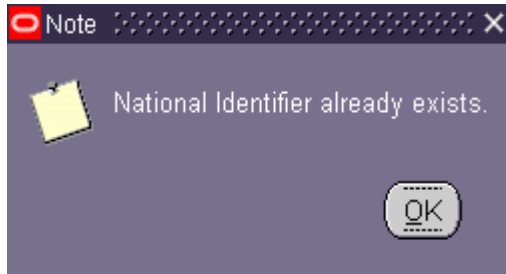
2. The **PERSON DATA FORM** opens. Required fields are yellow and must be completed before saving the form.

The screenshot shows the 'Person Data (Retrieve a Document)' form. It has fields for Full Name, Identification Number, Assignment Number, Document Reason (NEW HIRE), Document Number (125616), Document Status (OPEN), Effective Date (12-SEP-2005), Latest Hire Date (12-SEP-2005), Service Date (12-SEP-2005), Person Type (Employee), and Email Address. Below these are tabs for Personal, Employment, Directory, License, and Termination. The 'Personal' tab is selected. Under the 'Personal' tab, there are 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. At the bottom, there are buttons for Address, Schools and Colleges, Return to Previous Form, and Save.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

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

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



4. Enter the **employee's last name** exactly as it should appear in the **LAST NAME** field. **Remember this is the employee'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 **employee's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
6. Enter the **employee's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
7. Enter the **employee'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 **employee's birth date** using the **DD-
MMM-YY** format.
10. Click the **SAVE** button at the bottom of the form.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

The screenshot shows a web application window titled "Person Data (Retrieve a Document)". The form is divided into several sections:

- Document Information:** Full Name, Identification Number, Assignment Number, Document Reason (NEW HIRE), Document Number (125616), Document Status (OPEN), and Effective Date (12-SEP-2005).
- Employment Information:** Latest Hire Date (12-SEP-2005), Service Date (12-SEP-2005), Person Type (Employee), and Email Address.
- Navigation Tabs:** Personal, Employment, Directory, License, Termination.
- Personal Data Comparison:**

	Current	Proposed
SSN		229-68-7186
Last Name		Smith
First Name		Thomas
Middle Names		
Suffix		Jr.
Title		Mr.
Date Of Birth		16-JUL-1960
Gender		MALE
- Comments:** A text area for entering comments.
- Buttons:** Address, Schools and Colleges, Return to Previous Form, Save.

11. Once you click the **SAVE** button, the screen will advance to the **EMPLOYMENT** Tab.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT system. It features two columns: 'Current' and 'Proposed'. The 'Current' column has five input fields for 'Ethnic Origin', 'Veteran Status', 'I-9 Status', 'Visa Type', and 'Work Visa Expiration Date'. The 'Proposed' column has corresponding empty input fields. A 'Comments' field is located at the bottom of the form.

1. In the **ETHNIC ORIGIN** field, click the **LOV** and select the *employee's ethnic origin*. **Ethnic origin is a required field and must be filled in before you will be allowed to save the document.** Click **OK**.

The 'Ethnic Origin' dialog box is open, showing a list of options. The first option, 'White / Non Hispanic', is highlighted in blue. The other options are 'Black / Non Hispanic', 'Hispanic', 'Asian / Pacific Islander', and 'American Indian / Alaskan'. The dialog box has 'Find %' at the top, 'End', 'OK', and 'Cancel' buttons at the bottom.

2. Click in the **VETERANS STATUS** field only if the employee is a veteran. If the employee is not a veteran, leave the field blank. If applicable, use the **LOV** to select the correct Veteran Status; click **OK**.
3. Enter the **I-9 STATUS** or select the appropriate I-9 Status from the **LOV**. Click **OK**. For information regarding I-9's [click here](#).

The 'I-9 Status' dialog box is open, showing a list of options. The first option, 'No', is highlighted in blue. The other options are 'Not Required - Trainee' and 'Yes'. The dialog box has 'Find %' at the top, 'End', 'OK', and 'Cancel' buttons at the bottom.

NOTE: There are only three options listed here -- Yes, No, and Not Required - Trainee. You can submit the document with a No answer, but it will not be processed and completed until the I-9 has been received in Records Administration.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

- Click in the **VISA TYPE** field only if the employee has a Visa. If the employee 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 form.
- Click on the **DIRECTORY** Tab.

Entering Directory Information

The screenshot shows the 'Directory' tab in the ACT system. It is divided into 'Current' and 'Proposed' sections. On the left, there are labels for 'Alpha List', 'Online List', 'Directory Title', and 'Directory Name'. The 'Current' section has four empty input fields corresponding to these labels. The 'Proposed' section has four input fields. The first field is a dropdown menu with 'Yes' selected. The second field is empty. The third field is empty. The fourth field is empty.

- Click the **LOV** in the **ALPHA LIST** field. Choosing **Yes** will include the employee in the UAB paper phonebook listing; choosing **No** will exclude the employee. Click **OK**.
- ONLINE LIST** field defaults to **Yes**. All employees will be listed in the UAB Electronic phonebook.
- Click in the **DIRECTORY TITLE** field **only** if the employee'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 employee'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.**

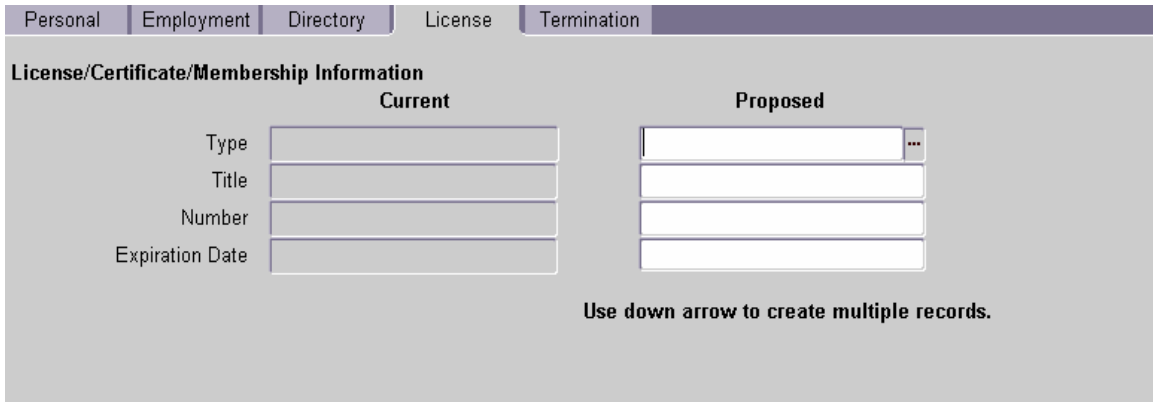
The screenshot shows the 'Directory' tab in the ACT system. It is divided into 'Current' and 'Proposed' sections. On the left, there are labels for 'Alpha List', 'Online List', 'Directory Title', and 'Directory Name'. The 'Current' section has four empty input fields corresponding to these labels. The 'Proposed' section has four input fields. The first field is a dropdown menu with 'Yes' selected. The second field is empty. The third field is empty. The fourth field is populated with the text 'Smith, Ph.D., Thomas'.

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

Appoint, Change, Terminate (ACT) Documentation New Hire – 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 employee holds a professional license, membership or certification.**



Personal | Employment | Directory | License | Termination

License/Certificate/Membership Information

	Current	Proposed
Type	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>
Number	<input type="text"/>	<input type="text"/>
Expiration Date	<input type="text"/>	<input type="text"/>

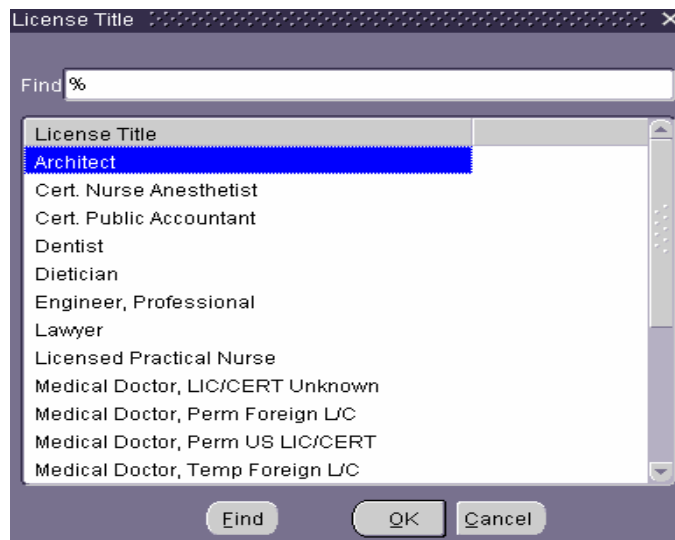
Use down arrow to create multiple records.

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.**



Name
Certification
License
Membership
Professional Competency Certification

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



License Title

Find %

License Title

- Architect
- 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
- Medical Doctor, Temp Foreign L/C

Find OK Cancel

Appoint, Change, Terminate (ACT) Documentation New Hire – 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: Type, Title, Number, and Expiration Date. The 'Proposed' column has three input fields: License, Registered Nurse, 1.096578, and 31-DEC-2006. Below the input fields is a note: '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 form; click the **ADDRESS** button to begin entering the employee's address information.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

Entering Address and Phone Information

Address and Phones (Retrieve a Document)

Full Name: **Smith, Thomas Jr.** Document Reason: **NEW HIRE**
Identification Number: [] Document Number: **125616**
Assignment Number: [] Document Status: **OPEN**
Effective Date: **12-SEP-2005**

Address

	Current	End Date	Current	Proposed
Address Type	[]	[]	[]	[]
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
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]

Use the down arrow to create multiple records.

International Address

Comments: []

Return to Previous Form Save

Note: All employees must have a local (US) address and/or campus address in order to receive correspondence. Employee's can change their home address through the Self Service once their New Hire 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**.

Address

	Current	End Date	Current	Proposed
Address Type	[]	[]	[]	[]
Address Line1	[]	[]	[]	[]
Address Line2	[]	[]	[]	[]
Address Line3	[]	[]	[]	[]
City	[]	[]	[]	[]
State	[]	[]	[]	[]
Zip Code	[] - []	[]	[]	[] - []

Use the down arrow to create multiple records.

Address Types

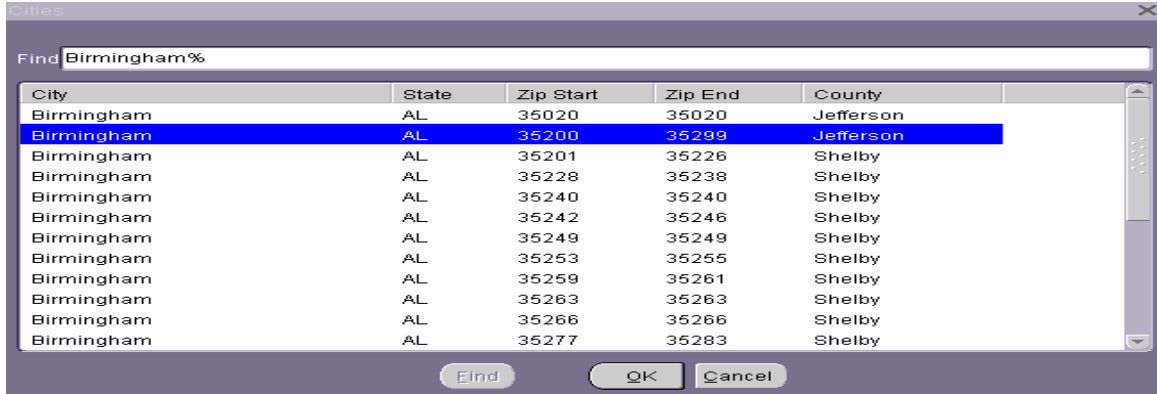
Find %

Type
Campus Primary
Campus Secondary
Campus Tertiary
Home
Recruiting

End OK Cancel

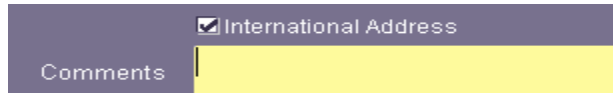
Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

2. Enter the **employee's street address** in the **ADDRESS LINE1** field. There are two more 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 employee lives**, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

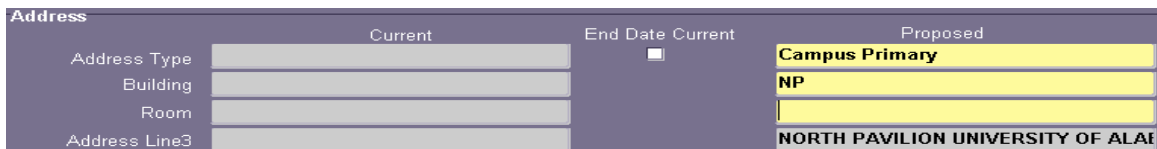


4. Highlight the **correct zip code range** for the city and county in which the employee lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

Note: If the employee 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.



Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

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.
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 employee will be working to ensure that the employee receives his or her campus mail. Click **SAVE**
11. Repeat the steps 6 - 10 if a Campus Secondary address is necessary.

Address		Current	End Date	Current	Proposed
Address Type	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary
Building	<input type="text"/>				NP
Room	<input type="text"/>				5771
Address Line3	<input type="text"/>				NORTH PAVILION UNIVERSITY OF ALABAMA
City	<input type="text"/>				Birmingham
State	<input type="text"/>				AL
Zip Code	<input type="text"/> - <input type="text"/>				35294 - 6950

Use the down arrow to create multiple records.

12. To enter both Home and Campus phone numbers, click in the **TYPE** field located in the Phones region of the form.

Phones				
Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use the down arrow to create multiple records.

13. Type **Home** in the **TYPE** field or choose **Home** from the LOV.
14. Enter the **employee's ten digit home phone number** in the **PHONE NUMBER** field without dashes.

Type	Phone Number (xxxxxxxx)
Home	2059985986

**Appoint, Change, Terminate (ACT) Documentation
New Hire – Part Two: Entering Person Data**

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**.

Type	Phone Number (xxxxxxxxxx)	Date From
Home	(205) 998-5986	12-SEP-2005
Campus Primary	(205) 975-6842	12-SEP-2005

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

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

Entering Schools and Colleges Information

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

The screenshot shows a web form titled "Schools and Colleges Attended (Retrieve a Document)". At the top, there are fields for "Full Name" (Smith, Thomas Jr.), "Document Reason" (NEW HIRE), "Identification Number", "Document Number" (125616), "Assignment Number", "Document Status" (OPEN), and "Effective Date" (12-SEP-2005). Below this is a table with columns: "Delete?", "School or College", "Degree Name", "Degree Date", "Type", "Transcript/Official Documentation on File", and "Degree Discipline". The first row is highlighted in yellow. Below the table, there is a "Comments" field and two buttons: "Return to Previous Form" and "Save".

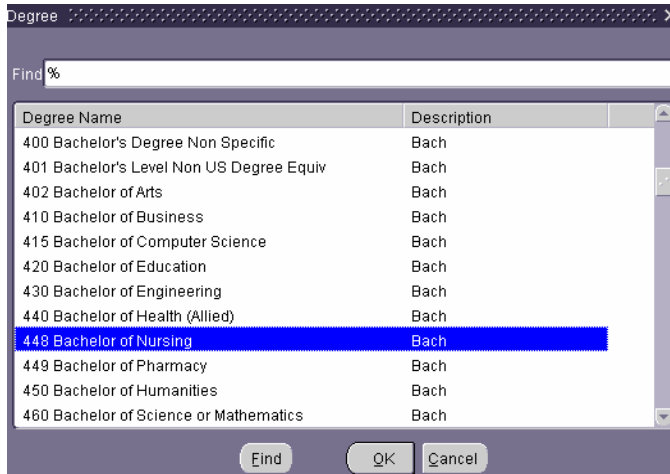
2. Type in the ***name of the school or college*** or select it from the LOV.

This screenshot shows the same form as above, but the "School or College" field in the first row of the table is populated with "University of Alabama at Birmin". The "Degree Name" field in the same row is highlighted in yellow. The "Delete?" checkbox is checked. The "Return to Previous Form" and "Save" buttons are still visible at the bottom.

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 employee has earned, (Examples: High School Graduate, GED, Post High School Coursework, Bachelors, Masters, or PhD etc.** Click **OK**.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data



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

Delete?	School or College	Degree Name	Degree Date	Type
<input type="checkbox"/>	University of Alabama at Birmin	448 Bachelor of Nursing	20-MAY-2005	

- 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.



Appoint, Change, Terminate (ACT) Documentation New Hire – Part Two: Entering Person Data

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

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

9. Click the **SAVE** button; then click return to **RETURN PREVIOUS FORM** button. This will take you back 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 New Hire – Part Three: Entering Assignment Information

The information on the Assignment form identifies the employee's employment status, which determines eligibility for employee benefits, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting an employee's worked time to payroll.

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

Assignment (Retrieve a Document)

Full Name	Smith, Thomas Jr.	Document Reason	NEW HIRE
Identification Number		Document Number	125616
Assignment Number		Document Status	OPEN
		Effective Date	12-SEP-2005

Effective Date From:
Effective Date To:
Primary:

Shift Differential Code:
Grandparented:
Effort Report Eligible:

General Assignment Information

	Proposed
Assignment Category	Active Assignment
Status	
Expected Return Date	
Organization	
Location	
Position	
Job	
Grade	
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	

Salary Labor Sources Element Entries Return to Previous Form Save

2. Select the **appropriate assignment category** from the **ASSIGNMENT CATEGORY LOV**. For a listing of UAB Assignment categories [click here](#). (You and UAB Section 2.1) Click **OK**.

Assignment Categories

Find %

Employment Category

- 01 Regular FT
- 02 Temporary FT
- 03 Regular PT
- 04 Irregular
- 06 Student
- 07 Resident
- 11 Eastern/Week Study

Find OK Cancel

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Three: Entering Assignment Information

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

General Assignment Information		Proposed
Assignment Category		01 Regular FT
Status		Active Assignment
Expected Return Date		
Organization		702500000 Cardiovascular Service
Location		Bham Main Campus
Position		
Job		
Grade		
Payroll Group		
Timecard Dist Number		
Timekeeping Method		
Timekeeping Organization		
Comments		

- 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.

General Assignment Information		Current	Proposed
Assignment Category			12 Three 12-Hour Shifts
Status			Active Assignment
Expected Return Date			
Organization			702500000 Cardiovascular Service
Location			Bham Main Campus
Position			702500000.71021.031001
Job			HN010ND.Registered Nurse
Grade			W.H70

- Select the *appropriate payroll group* from the **PAYROLL GROUP** LOV. Click **OK**

Note: Faculty 12 = Faculty who work 12 months of the year. Faculty 9 = Faculty who work 9 months of the year. Staff 12 = Staff who work 12 months of the year. Staff 9 = Staff who work 9 months of the year.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Three: Entering Assignment Information

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

Assignment (Retrieve a Document)

Full Name	Smith, Thomas Jr.	Document Reason	NEW HIRE
Identification Number		Document Number	125616
Assignment Number		Document Status	OPEN
		Effective Date	12-SEP-2005

Effective Date From		Shift Differential Code	P1
Effective Date To		Grandparented	
Primary		Effort Report Eligible	

General Assignment Information	
Current	Proposed
Assignment Category	12 Three 12-Hour Shifts
Status	Active Assignment
Expected Return Date	
Organization	702500000 Cardiovascular Service
Location	Bham Main Campus
Position	702500000.71021.031001
Job	HNO10NO.Registered Nurse
Grade	W.H70
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TAMS
Timekeeping Organization	
Comments	

Salary Labor Sources Element Entries Return to Previous Form Save

9. Click the **SALARY** button at the bottom of the form.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Four: Entering Salary Information

The Salary information should be completed before entering the Labor Sources data.

1. Click the **SALARY** button at the bottom of the **ASSIGNMENT FORM** or the **ACT MAIN FORM**. This will open the **SALARY** Form.

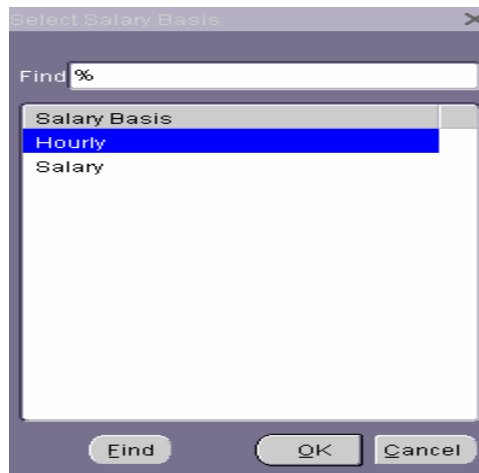
Note: The yellow required field or fields in the PROPOSED section must be completed first. The yellow required fields will be different according to your organization. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.

- A. **HOSP CALC CODE** field is a required field for **Hospital Employees only**. Use the Hosp Calc Code LOV to select the **appropriate calc code**. To view a listing of Hospital Calc Codes, [click here](#).

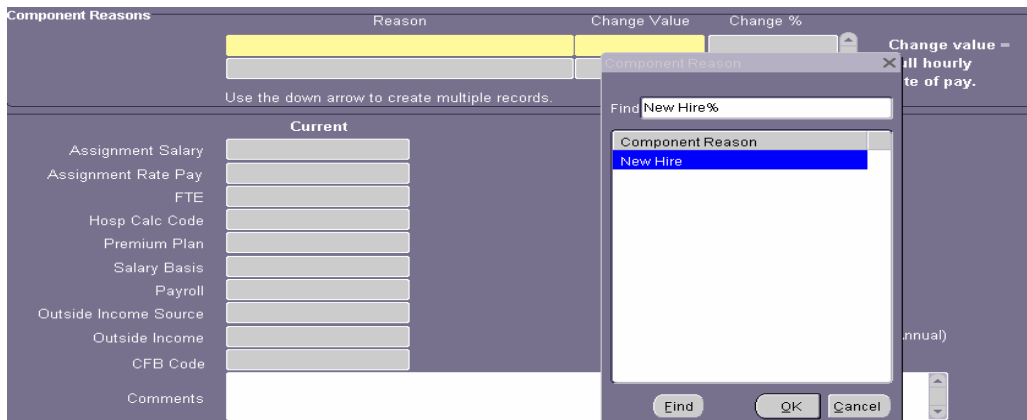
Note: For Hospital Organizations the Premium Plan, Salary Basis and Payroll fields, will auto populate based on the position code entered on the Assignment Form.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Four: Entering Salary Information

- B. **SALARY BASIS** field is a required field for **University Employees only**. Using the LOV select the appropriate Salary Basis Type; click **OK**.



2. In the Component Reasons section, click in the **REASON** Field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields. Using the LOV in the Reason field select **New Hire**, click **OK**.



3. Click in the **CHANGE VALUE** field; enter either the **hourly rate** (for a bi-weekly paid employee) or the **monthly rate** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered.
4. Enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is **strongly recommended** that you enter this information for Records. For explanation of FTE values **FOR HOSPITAL ONLY** [click here](#).
5. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK**.

Note: There are only two outside income sources -- VA and Eye Foundation.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Four: Entering Salary Information

6. Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
7. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

	Current	Proposed
Assignment Salary	<input type="text"/>	43,729.92
Assignment Rate Pay	<input type="text"/>	22.61
FTE	<input type="text"/>	<input type="text"/>
Hosp Calc Code	<input type="text"/>	RK
Premium Plan	<input type="text"/>	NA
Salary Basis	<input type="text"/>	HOURLY
Payroll	<input type="text"/>	Biweekly
Outside Income Source	<input type="text"/>	V VA Hospital
Outside Income	<input type="text"/>	5,000.00 (Annual)
CFB Code	<input type="text"/>	GROUP C
Comments	Employee receives Outside Income of 5,000.00 annual from the VA Hospital.	

8. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ASSIGNMENT** form.
9. Click the **LABOR SOURCE** button at the bottom of the **ASSIGNMENT** Form.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Five: Entering Labor Sources

The Labor Sources indicate what account strings the employee's salary and associated fringe benefits will be costed (charged) to. Because the GL and GA account structures are different, there are differences in entering the account string data.

Entering General Ledger (GL) Information

Current	Stop	Effective Date	From Date	To Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-2005								
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									

1. Click on the **GL CODE** LOV. This opens the **UAB_AKF FIND** window.

2. Enter the **ten-digit GL Account number** in the **ALIAS** field; click **OK**. This opens the window below. All but the **OBJECT** field has been auto populated.

ACCOUNT	7110340	SW 5S CV SURGERY
SUBACCOUNT	000	DEFAULT SUBACCOUNT
BALANCING	130000000	UAB UNIV HOSP GEN OPER FDS
ORGANIZATION	702500000	CARDIOVASCULAR SERVICES
FUTURE	0000	DEFAULT
OBJECT		

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Five: Entering Labor Sources

3. Click in the **OBJECT** field and enter **Zero (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.
4. Type in the **percent of the employee's funding** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

5. Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field has to total **100%** before you can save the document.

Assignment Salary: 43,729.92 Element Name: [dropdown]

Costing

Assignment Element

Current	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-2005	7110340.000.130000000.702500000					100.00
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Comments:

Total LD %: 100.00

6. Once the **TOTAL LD%** field equals 100%, click **SAVE**.

Entering Grant (GA) Funding Sources

1. Click one time in the **PROJECT** field of the next available row.

Assignment Salary: 43,729.92 Element Name: [dropdown]

Costing

Assignment Element

Current	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-2005	7110340.000.130000000.702500000					50.00
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Total LD %: 50.00

2. Type the **project number** in the **PROJECT** field or choose the **Project number** from the LOV. Press the **TAB** key or click in the next **TASK** field.

Appoint, Change, Terminate (ACT) Documentation New Hire – Part Five: Entering Labor Sources

3. Type the **task number** in the **TASK** field or choose the **Task number** from the LOV. **TAB** to the **AWARD** field or click in the **AWARD** field.
4. Type the **award number** in the **AWARD** field or choose the **Award number** from the LOV. **TAB** to or click in the next field.
5. Type in the **organization number** or choose the **Expenditure Organization number** from the LOV.

Note: For the hospital, this will be 70. For the university, this will be 10.

7. Type in the **percent of the employee's effort** to be charged to the project number in the **%** field.
8. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.

Assignment Salary Element Name

Costing

Assignment

Current LD	Step	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-2005		7110340.000.130000000.702500000					50.00
<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-2005	30-SEP-2005		225820	01.01	1525820	10	50.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: Total LD %

Note: TOTAL LD% must equal 100% before you can save the document.

9. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

Appoint, Change, Terminate (ACT) Documentation New Hire-- Part Six: Submitting a New Hire Document

Before submitting the New Hire document, verify all information is entered correctly and all attachments are ready to be submitted. The HR Officer submits the New Hire 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 details:

- Document Reason:** NEW HIRE
- Effective Date:** 12-SEP-2005
- Requestor Name:** HALEY
- Document Number:** 125616
- Document Status:** OPEN
- Workflow Type:** HIRE
- Submit Date:** (empty)
- Attachments:** Attachments Received

Person Data:

- Name:** Smith, Thomas Jr.
- Gender:** Male
- Ethnic Origin:** White / Non Hispanic
- Total Active Assignments:** 1
- Total Annual Salary:** 43,729.92
- Latest Hire Date:** 12-SEP-2005
- Date of Birth:** 16-JUL-1960
- Prior UAB Service:**

Assignment Data:

- Assignment Number:** (empty)
- Assignment Category:** 12 Three 12-Hour Shifts
- Job:** HN010N0.Registered Nurse
- FTE:** (empty)
- Assignment Salary:** 43,729.92
- Assignment Status:** Active Assignment
- Organization:** 702500000 Cardiovascular S
- Position:** 702500000.72222.031001
- Primary:** (empty)
- Payroll:** Biweekly

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

Comments: Employee receives Outside Income of 5,000.00 annual from the VA Hospital. |

Buttons: Save, Submit, Cancel this document, Log, Reassign

1. On the **ACT MAIN FORM**, checkmarks have been inserted in the checkbox next to **PERSON, ADDRESS, ASSIGNMENT, SALARY** and **LABOR SOURCES**.

Note: A check will be inserted automatically when **REQUIRED FIELDS** on all screens and tabs have been completed. All check boxes must be checked (excluding Element Entries, except on Status 99 New Hire Document) before submitting the document.

2. On the **ACT MAIN FORM**, verify the Attachments check box has a checkmark; assemble all attachments to be submitted with New Hire document.

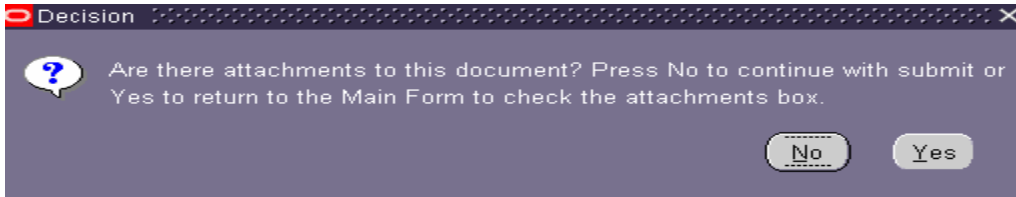
The screenshot shows the ACT Main Form with the following details:

- Document Reason:** NEW HIRE
- Effective Date:** 19-SEP-2005
- Requestor Name:** HALEY
- Attachments:** Attachments Received

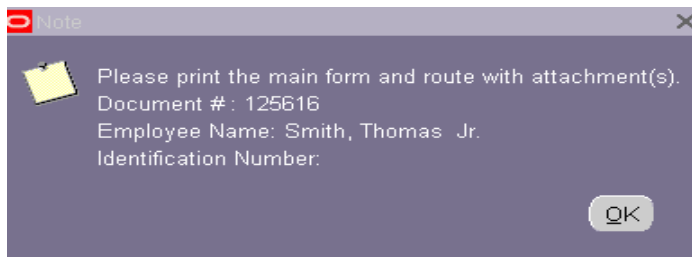
3. Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**
4. Click the **SUBMIT** button.

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

5. If the document was submitted without a checkmark in the **ATTACHMENTS** box on the **ACT MAIN FORM**, the following **DECISION** window displays.



6. Click **YES** to return to the **ACT MAIN FORM**; click in the **ATTACHMENTS** checkbox and resubmit the document.
7. The following Note displays.



8. Click **OK**. Print the **ACT MAIN FORM**; attach a printed copy of the **ACT MAIN FORM** to attachments being sent Central HR.
9. 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).*

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

ACT Main Form

Document Reason	NEW HIRE	Document Number	125616
Effective Date	12-SEP-2005	Document Status	READY
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	14-SEP-2005 12:04:05

Person Data

Name	Smith, Thomas Jr.	Gender	Male
Identification Number		Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	12-SEP-2005	Total Annual Salary	43,729.92
Date of Birth	16-JUL-1960	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	Active Assignment
Assignment Category	12 Three 12-Hour Shifts	Organization	702500000 Cardiovascular S
Job	HN010N0.Registered Nurse	Position	702500000.72222.031001
FTE	.9	Primary	
Assignment Salary	43,729.92	Payroll	Biweekly

Person Address Assignment Salary Element Entries Labor Sources

Comments: Employee receives Outside Income of 5,000.00 annual from the VA Hospital. |

Person Data | Address | Assignment | Salary | Element Entries | Labor Sources

Save | Submit | Cancel this document | Log | Reassign

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

- Once the **NEW HIRE** 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. When the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

ACT Main Form

Document Reason	NEW HIRE	Document Number	125616
Effective Date	12-SEP-2005	Document Status	COMPLETE
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	14-SEP-2005 12:04:05

Person Data

Name	Smith, Thomas Jr.	Gender	Male
Identification Number	1033570	Ethnic Origin	White / Non Hispanic
SSN	229-68-7186	Total Active Assignments	1
Latest Hire Date	12-SEP-2005	Total Annual Salary	43,729.92
Date of Birth	16-JUL-1960	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1033570	Assignment Status	Active Assignment
Assignment Category	12 Three 12-Hour Shifts	Organization	702500000 Cardiovascular S
Job	HN010N0.Registered Nurse	Position	702500000.72222.031001
FTE	.9	Primary	
Assignment Salary	43,729.92	Payroll	Biweekly

Person Address Assignment Salary Element Entries Labor Sources

Comments: Employee receives Outside Income of 5,000.00 annual from the VA Hospital. |

Person Data | Address | Assignment | Salary | Element Entries | Labor Sources

Save | Submit | Cancel this document | Log | Reassign

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

11. The requestor of the **NEW HIRE** document will receive email notification when an employee's **NEW HIRE** document has entered a **COMPLETE** status.

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

[RETURN TO TOP](#)