

Appoint, Change, Terminate (ACT) Documentation

Part One: Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

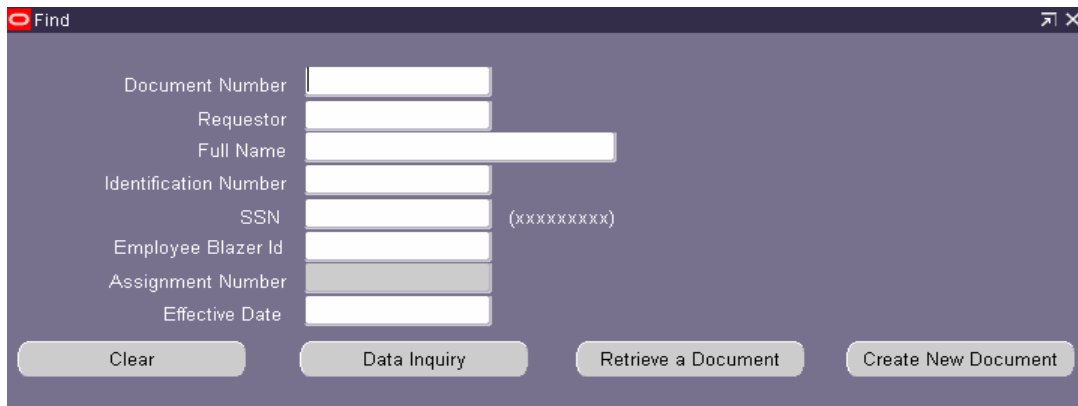
A New Hire Document for a One Time Requisition Pay Employee (Status 99) is completed by the HR Officer on individuals to whom UAB anticipates making only **ONE** employee payment. It should not be used for individuals that a department anticipates paying more than once even if subsequent payments will not be made for several months. Requisition employees are not eligible for any UAB benefits or privileges of employment. For UAB Policy on payment of Individual Services, [click here](#).

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

The information entered on the ACT form for a One Time Requisition Pay Employee provides the data needed for the employee to be paid for the service they provided to UAB. 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 Requisition Pay 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 web-based search window titled "Find". It contains several input fields for search criteria: Document Number, Requestor, Full Name, Identification Number, SSN (with a placeholder "(xxxxxxxx)"), Employee Blazer Id, Assignment Number, and Effective Date. Below the fields are four buttons: "Clear", "Data Inquiry", "Retrieve a Document", and "Create New Document".

2. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.

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The screenshot shows the 'ACT Main Form' interface. The 'Document Reason' field is highlighted with a red circle and an arrow pointing to it. The 'Requestor Name' field contains the text 'HALEY'. Below the form are several tabs: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. At the bottom are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

3. Click on the **LOV** box in the **DOCUMENT REASON** field.
4. Choose **New Hire**, click **OK**. Once you click OK you will be directed back to the **ACT MAIN FORM**.

The screenshot shows the 'Document Reason' dialog box. It has a search field labeled 'Find %' and a table with two columns: 'Doc_Reason' and 'Doc_Type'. The 'NEW HIRE' row is highlighted in blue.

Doc_Reason	Doc_Type
CREATE VOLUNTEER	HIRE
NEW HIRE	HIRE
NEW TRAINEE AWARD	HIRE

Buttons at the bottom: Find, OK, Cancel.

5. Enter the **Effective Date** in the **EFFECTIVE DATE** field. **Note: The effective date should be the first day of the service being provided. This date cannot be changed once you have submitted the document, Verify you have entered the correct hire date.** Use the calendar **LOV** or type in the desired date using the **DD-MMM-YY** Format.

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- Click **ATTACHMENTS** box to indicate attachments **will be** accompanying the new hire document. For list of Attachments to accompany a New Hire document, [click here](#).

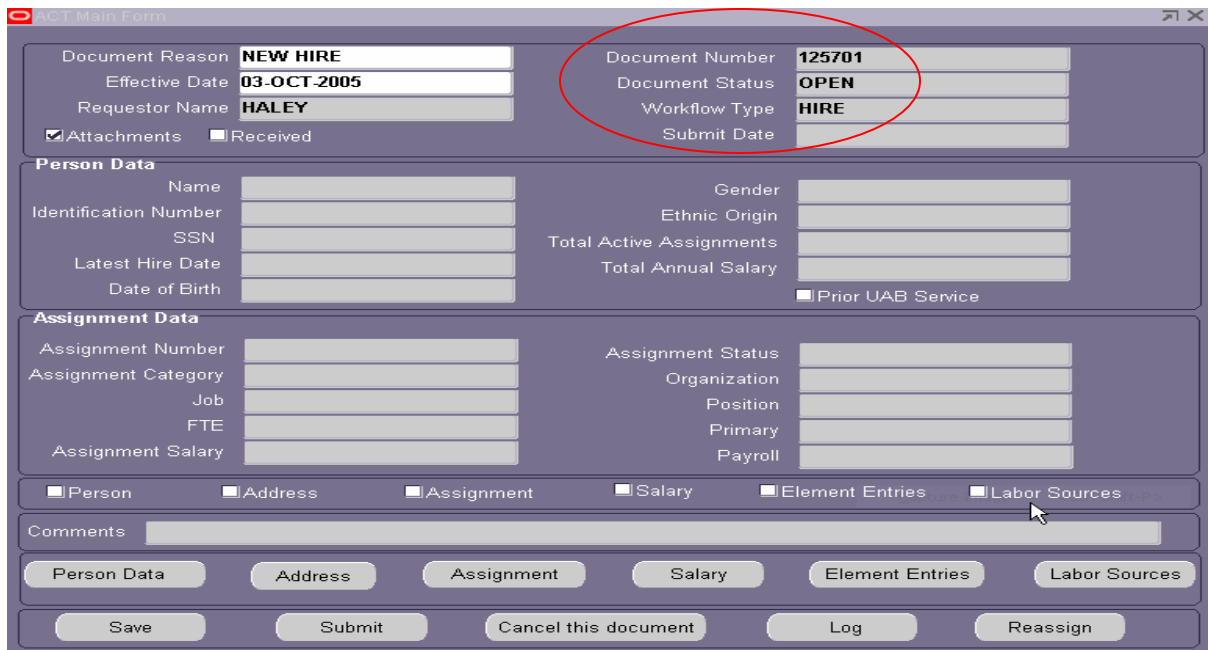


ACT Main Form

Document Reason	NEW HIRE
Effective Date	03-OCT-2005
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

- Click **SAVE**. The system will assign a **Document Number** and the **DOCUMENT STATUS** is **OPEN**.

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 their name, Social Security number, or employee ID number until the document has reached a **COMPLETE** status.



ACT Main Form

Document Reason	NEW HIRE	Document Number	125701
Effective Date	03-OCT-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 Part Two: Entering the Person Data

The Person Data screen contains personal employee data and demographic information necessary for issuing payment to an individual. For the One Time Requisition Pay Employee the tabs to be completed on the Person Data button are the: Personal tab, Employment tab and Termination tab; also the Address button on the ACT Main Form will need to be completed.

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' window. At the top, there are fields for Document Reason (NEW HIRE), Effective Date (03-OCT-2005), Requestor Name (HALEY), Document Number (125701), Document Status (OPEN), and Workflow Type (HIRE). Below this is the 'Person Data' section with fields for Name, Identification Number, SSN, Latest Hire Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, and Total Annual Salary. There is also an 'Assignment Data' section with fields for Assignment Number, Assignment Category, Job, FTE, Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll. At the bottom, there are several tabs: Person, Address, Assignment, Salary, Element Entries, and Labor Sources. The 'Person Data' tab is highlighted in yellow. Below the tabs are buttons for Save, Submit, Cancel this document, Log, and Reassign.

2. The **PERSON DATA SCREEN** opens. **Required fields are yellow and must be completed before you can save the form and move on.**

The screenshot shows the 'Person Data (Create New Document)' window. It has fields for Full Name, Identification Number, Assignment Number, Document Reason (NEW HIRE), Document Number (125701), Document Status (OPEN), Effective Date (03-OCT-2005), Latest Hire Date (03-OCT-2005), Service Date (03-OCT-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 Part Two: Entering the 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.
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 screen.

	Current	Proposed
SSN		444-98-7750
Last Name		Clark
First Name		Samuel
Middle Names		
Suffix		
Title		Mr.
Date Of Birth		08-AUG-1960
Gender		MALE

Comments

Address Schools and Colleges Return to Previous Form Save

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

Appoint, Change, Terminate (ACT) Documentation Part Two: Entering the Person Data

Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT Documentation software. It features two columns: 'Current' and 'Proposed'. Each column has five input fields corresponding to the following fields: Ethnic Origin, Veteran Status, I-9 Status, Visa Type, and Work Visa Expiration Date. The 'Proposed' column's input fields are highlighted in yellow. At the bottom, there is a 'Comments' text area.

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 screenshot shows the 'Ethnic Origin' LOV dialog box. It has a search field at the top labeled 'Find %'. Below it is a list of options: 'White / Non Hispanic', 'Black / Non Hispanic', 'Hispanic', 'Asian / Pacific Islander', and 'American Indian / Alaskan'. The 'White / Non Hispanic' option is highlighted in blue. At the bottom, there are three buttons: 'Eind', 'OK', and 'Cancel'.

2. In the I-9 Status field, select the appropriate I-9 Status from the LOV. Click **OK**. For information on I-9's [click here](#).

The screenshot shows the 'I-9 Status' LOV dialog box. It has a search field at the top labeled 'Find %'. Below it is a list of options: 'No', 'Not Required - Trainee', and 'Yes'. The 'No' option is highlighted in blue. At the bottom, there are three buttons: 'Eind', 'OK', and 'Cancel'.

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 Part Two: Entering the Person Data

3. 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.
 - a. Select the appropriate **Visa Type** from the **LOV**, if applicable.
 - b. 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.
4. Click the **SAVE** button at the bottom of the screen.
5. Click on the **TERMINATION** Tab.

Entering Termination Information

Note: The TERMINATION Tab is used in a New Hire Document only when you are entering a One Time Requisition Pay Employee. The Requisition Pay Employee is being paid for a ONE TIME SERVICE only; the Projected Last Day of Work is thirty days after the effective date of the New Hire document.

1. Click on the **TERMINATION** tab.

The screenshot shows the 'Termination' tab selected in the ACT system. The interface is divided into 'Current' and 'Proposed' sections. The 'Current' section has fields for 'Actual Date', 'Projected Last Day of Work', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. The 'Proposed' section has a dropdown menu for 'Projected Last Day of Work' and a text input field for 'Leaving Reason'. Below the form is a 'Comments' field and a navigation bar with buttons for 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

2. Click in the **PROJECTED LAST DAY OF WORK** field; enter the **Projected Last Day of Work** from the Calendar LOV or Type the date in the field, using the **ddmmmyy** format.

This screenshot is identical to the previous one, but the 'Projected Last Day of Work' dropdown menu in the 'Proposed' section is now open, and the date '03-NOV-2005' is entered in the text input field.

3. Click the **SAVE** button at the bottom of the screen; click the **ADDRESS** button at the bottom of the screen.

Appoint, Change, Terminate (ACT) Documentation

Part Two: Entering the Person Data

Entering Address and Phone Information

All employees must have a local (US) address and/or campus address in order to submit the New Hire Document.

Address and Phones (Create New Document)

Full Name: **Clark, Samuel** Document Reason: **NEW HIRE**

Identification Number: [] Document Number: **125701**

Assignment Number: [] Document Status: **OPEN**

Effective Date: **03-OCT-2005**

Address

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

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

1. Type **Home** or make the selection from the LOV in the **ADDRESS TYPE** field. Click **OK**.

Address

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

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

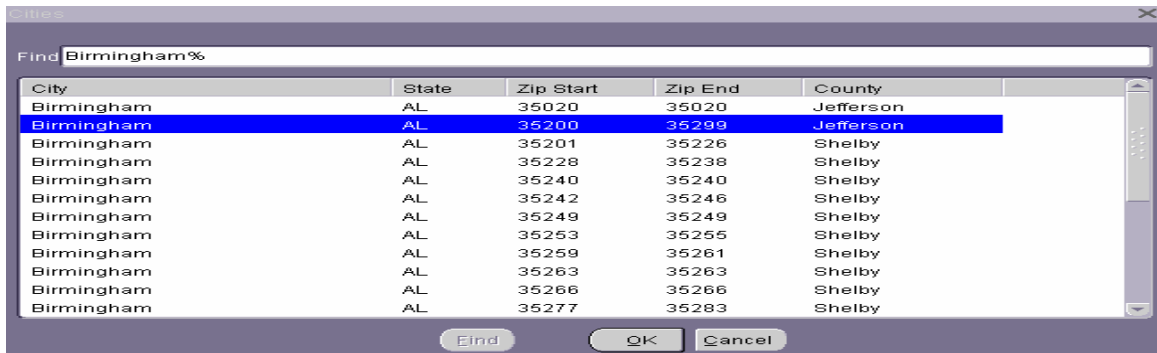
Home

Recruiting

Eind OK Cancel

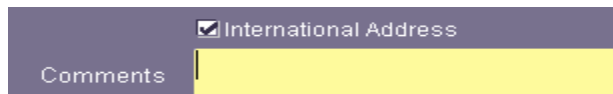
2. Enter the **employee's street address** in the **ADDRESS LINE1** field. There are two more address lines available if needed.
3. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type **the name of the city in which the employee lives**, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

Appoint, Change, Terminate (ACT) Documentation Part Two: Entering the Person Data

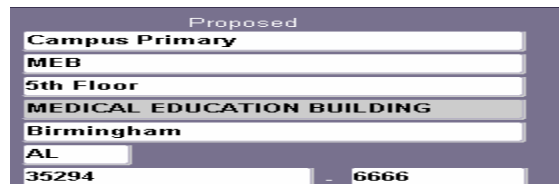


4. Highlight the **correct zip code range** for the city and county in which the employee lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

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.



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.

Appoint, Change, Terminate (ACT) Documentation Part Two: Entering the Person Data

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 providing a service. Click **SAVE**

The screenshot shows the 'Address' section of a form. It is divided into 'Current' and 'Proposed' sections. The 'Current' section has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' section has fields for Campus Primary, Building, Floor, City, State, and Zip Code. The 'Proposed' fields are populated with: Campus Primary, MEB, 5th Floor, MEDICAL EDUCATION BUILDING, Birmingham, AL, 35294, and 6666. A note at the bottom says 'Use the down arrow to create multiple records.'

11. To enter phone numbers for the employee, click in the **TYPE** field located in the **PHONES** region of the form.

The screenshot shows the 'Phones' section of a form. It contains a table with columns: Delete, Current, Type, Phone Number (xxxxxxxxxx), and Date From. The 'Type' column is highlighted in yellow, and an arrow points to it from the text below. A note at the bottom says 'Use the down arrow to create multiple records.'

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

This is a close-up of the 'Phones' table. The 'Type' field contains the text 'Home' and the 'Phone Number' field contains '2059985986'. The 'Date From' field is empty.

14. Type the **effective start date** in the **DATE FROM** field or use the calendar LOV. **Usually this is the effective date of the document.**
15. Click in **the row under the Home phone listing**. Type in **Campus Primary** or choose **Campus Primary** from the **PHONES TYPE LOV**.
16. Enter the **ten digit campus telephone number**.
17. 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**.

The screenshot shows the 'Phones' section of a form with two rows in the table. The first row has 'Home' in the Type field, '(256) 603-1514' in the Phone Number field, and '03-OCT-2005' in the Date From field. The second row has 'Campus Primary' in the Type field, '(205) 934-4678' in the Phone Number field, and '03-OCT-2005' in the Date From field. A note at the bottom says 'Use the down arrow to create multiple records.'

18. Click the **ASSIGNMENT** button at the bottom of the ACT Main Form.

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

The information on the Assignment screen identifies the individual being paid for a One Time Service, as a Status 99 employee. It also identifies the organization and position number the individual is affiliated with.

Entering Assignment Information

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

Assignment (Create New Document)

Full Name **Clark, Samuel** Document Reason **NEW HIRE**
Identification Number Document Number **125701**
Assignment Number Document Status **OPEN**
Effective Date **03-OCT-2005**

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

General Assignment Information

Current	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 **99 Requisition** from the **ASSIGNMENT CATEGORY LOV**. Click **OK**.

Assignment Categories

Find %

Employment Category

- 07 Resident
- 11 Federal Work Study
- 12 Three 12-Hour Shifts
- 17 Weekend Staff Nurse
- 21 Post Doc Employee
- 99 Requisition**

Find OK Cancel

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

3. Click in the **ORGANIZATION** field; type the *appropriate organization* in which the individual will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.
4. The **PAYROLL GROUP** field automatically populates with *Supplemental*.

General Assignment Information		Current	Proposed
Assignment Category			99 Requisition
Status			Active Assignment
Expected Return Date			
Organization			392300000 Pathology Chair Office
Location			Bham Main Campus
Position			
Job			
Grade			
Payroll Group			Supplemental
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Comments			

5. Click in the **POSITION** field; select the *appropriate 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. By entering the correct position, the **JOB** field and **GRADE** field will be auto populated.

General Assignment Information		Current	Proposed
Assignment Category			99 Requisition
Status			Active Assignment
Expected Return Date			
Organization			392300000 Pathology Chair Office
Location			Bham Main Campus
Position			392300000.88901.040501
Job			0137.Lecturer
Grade			F.999
Payroll Group			Supplemental
Timecard Dist Number			
Timekeeping Method			NA
Timekeeping Organization			
Comments			

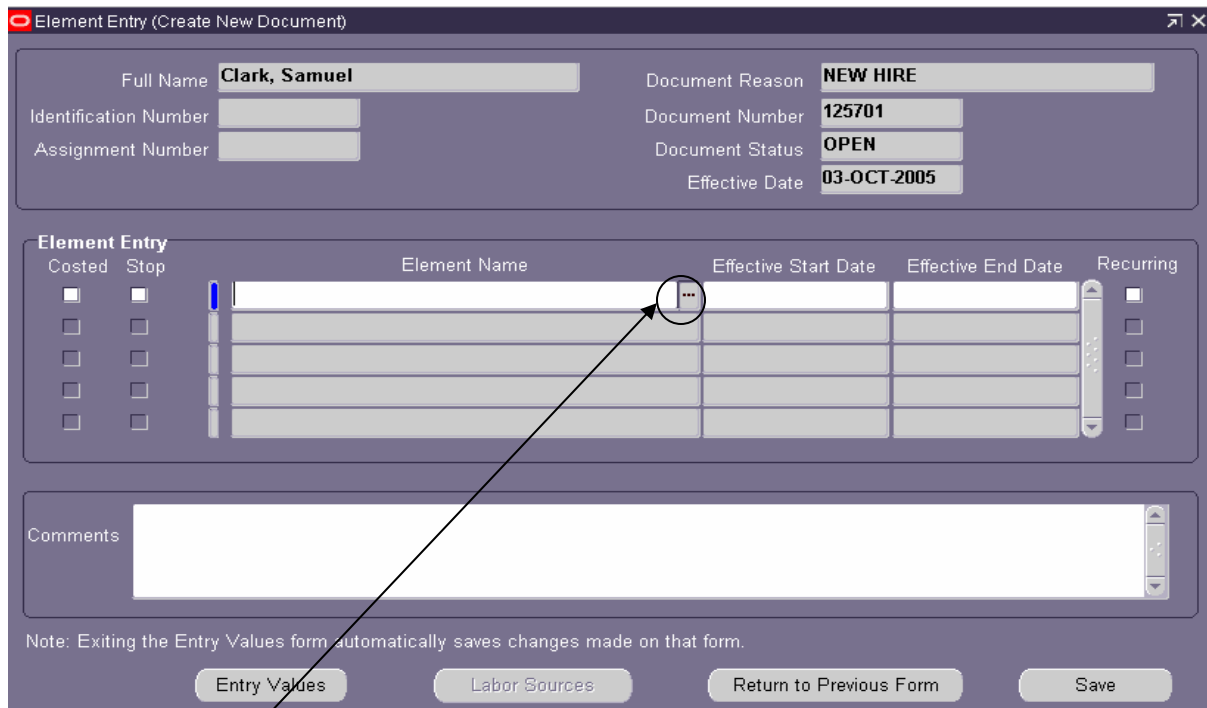
6. Click in the **TIMEKEEPING METHOD**, using the LOV select **NA (NOT APPLICABLE)**.
7. Click on the **SAVE** button at the bottom of the screen.
8. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

Appoint, Change, Terminate (ACT) Documentation Part Four: Entering Element Entries

The Information entered on the Element Entries screen, is used by Payroll to initiate a One Time Payment for the Individual being paid for a one time service. Within the Element Entries screen the following information is required in order to process payment: type of payment, effective date of the payment, and dollar amount of the payment to be made by Payroll.

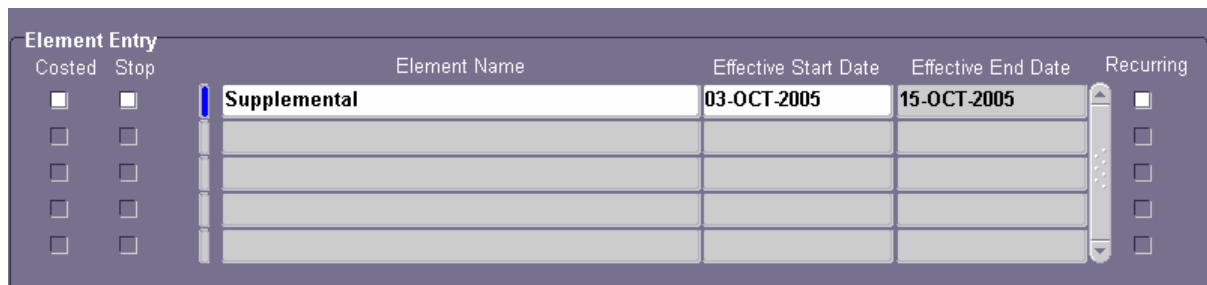
Entering Element Entries

1. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM**.



Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

2. Click on the LOV for the **ELEMENT NAME** field, and choose *the appropriate element name*.
3. The **EFFECTIVE START DATE** will be auto populated with the effective date of the document. The **EFFECTIVE END DATE** will be auto populated with the last day of the payroll period in which the document is to be paid.



Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Supplemental	03-OCT-2005	15-OCT-2005	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

Appoint, Change, Terminate (ACT) Documentation Part Four: Entering Element Entries

1. In the **COMMENTS** section enter **a brief explanation of the payment and what services the individual provided to the University.**

Element Entry		Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>	Supplemental	03-OCT-2005	15-OCT-2005	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<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: Presentation of Molecular & Cellular Pathology Series done on Oct 3, 2005 at Bevill Research Bldg., Room 170. Total payment of \$500.00

Note: Exiting the Entry Values form automatically saves changes made on that form.

2. Click on the **SAVE** button at the bottom of the form before clicking on the **ENTRY VALUES** button. **If you do not save the screen before attempting to click on the ENTRY VALUES button, you will receive this error message.**



3. Click on the **OK** button to return to the **ELEMENT** screen; click the **SAVE** button at the bottom of the form.
4. Click on the **ENTRY VALUE** button at the bottom of the form.
5. The **ENTRY VALUES** screen will look similar to the one below.

Pay Value	
Amount	500.00
Jurisdiction	
Tax Separately	No
Deduction Processing	All Deductions
Separate Check	No
Document	
Future 1	
Future 2	
Further Entry Information	
Date Earned	
Payee Details	
Processing Priority	2500

Note: Exiting this screen automatically saves changes made here.

6. Click in the **AMOUNT** field and enter **the monetary amount to be paid.** The remaining fields will auto populate as needed.

Appoint, Change, Terminate (ACT) Documentation
Part Four: Entering Element Entries

7. Click on the **X** at the top of this window to close and save this information.

Note: There is not a Save button on the Entry Values Screen Exiting this screen automatically saves the changes.

8. From the **ELEMENT ENTRIES** form; click on the **LABOR SOURCE** button.

Appoint, Change, Terminate (ACT) Documentation Part Five: Entering Labor Source

The Labor Source screen indicates what account string the individual's payment will be costed (charged) to.

Entering Labor Source

Full Name **Clark, Samuel** Document Reason **NEW HIRE**
Identification Number Document Number **125701**
Assignment Number Document Status **OPEN**
Effective Date **03-OCT-2005**

Assignment Salary **.00** Element Name [dropdown]
Costing

Current	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<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: [text area] Total LD % **.00**

Return to Previous Form Save

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

ALIAS [input field]

OK Cancel Clear Help

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 **2100405** PATHOLOGY MOL/CELLUL
SUBACCOUNT **000** DEFAULT SUBACCOUNT
BALANCING **123900000** JOINT HLTH SCI GEN OPER FDS
ORGANIZATION **392301000** MOLECULAR & CELLULAR PATHOLOGY
FUTURE **0000** DEFAULT
OBJECT [dropdown]

OK Cancel Combinations Clear Help

Appoint, Change, Terminate (ACT) Documentation Part Five: Entering Labor Source

3. Click in the **OBJECT** field and enter Zero (0); Click **OK**. You will be taken back to the **LABOR SOURCE** screen.
4. Type in the % field *the percent of funding* to be paid from the GL account string.

Note: A One Time Pay Requisition Employee can have multiple GL accounts being costed. Each GL account string will need to be entered individually. Only one funding source is allowed for each record/row. Use the down arrow key to move the cursor to the next available row. The total percent of funding must be 100%.

Current	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>	03-OCT-2005		2100405.000.123900000.392301000					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

Return to Previous Form Save

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

Entering Grant (GA) Funding Sources

Note: Before submitting the New Hire Document for a One Time Requisition Pay Employee being paid from a GA Account String, contact Grants and Contracts to verify the expenditure has been approved in advance.

1. Click one time in the **PROJECT** field.

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

Appoint, Change, Terminate (ACT) Documentation Part Five: Entering Labor Source

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.

1. Type in the **percent of the employee's effort** to be charged to the project number in the % field.
2. 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 Element

Current Stop

Effective Date		GL Code	Project	Task	Award	Exp Or	%
From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>		225820	01.01	1525820	10	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 %

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

3. 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.
6. Click on the **RETURN TO PREVIOUS FORM** button until you return to the **ACT MAIN FORM**.

Appoint, Change, Terminate (ACT) Documentation

Part Six: Submitting a New Hire Document for a One Time Requisition Pay Employee

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 data:

Document Reason	NEW HIRE	Document Number	125701
Effective Date	03-OCT-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Clark, Samuel	Gender	Male
Identification Number		Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	03-OCT-2005	Total Annual Salary	.00
Date of Birth	08-AUG-1960	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	Active Assignment
Assignment Category	99 Requisition	Organization	392300000 Pathology Chair
Job	0137.Lecturer	Position	392300000.88901.040501
FTE	0	Primary	
Assignment Salary	.00	Payroll	Biweekly

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

Comments: Presentation of Molecular & Cellular Pathology Series done on Oct 3, 2005 at Bevill Research Bldg., R1

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources

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

Note: A check will be inserted when REQUIRED FIELDS on all screens and tabs have been completed. All check boxes must be checked.

2. On the **ACT MAIN FORM**, verify you have a check in the **ATTACHMENTS** box; assemble all attachments to be submitted with New Hire document.

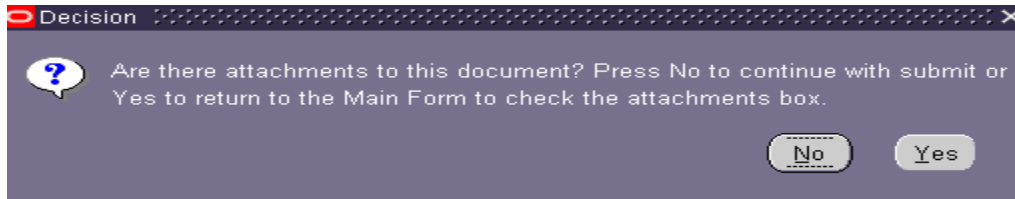
The close-up screenshot shows the top section of the ACT Main Form:

Document Reason	NEW HIRE
Effective Date	03-OCT-2005
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

3. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
4. Click the **SUBMIT** button.

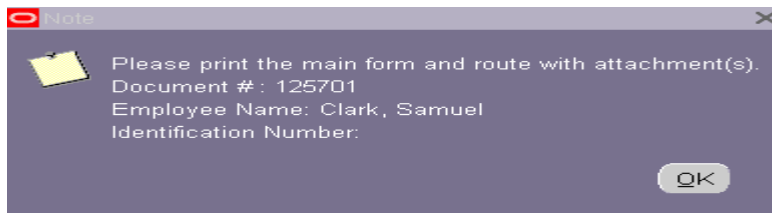
Appoint, Change, Terminate (ACT) Documentation Part Six: Submitting a New Hire Document for a One Time Requisition Pay Employee

5. If you **did not** check the **ATTACHMENTS** checkbox, you will see the following message.



6. Click **YES** to return to the **ACT MAIN FORM** and check the **ATTACHMENTS** box and resubmit.

7. If you **did** check the **ATTACHMENTS** checkbox, you will see the following message.



8. Click **OK**. Print the **ACT MAIN FORM**; attach printed copy as front page of attachments being sent to 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).

Document Reason	NEW HIRE	Document Number	125701
Effective Date	03-OCT-2005	Document Status	READY
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	29-SEP-2005 11:15:47
Person Data			
Name	Clark, Samuel	Gender	Male
Identification Number		Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	03-OCT-2005	Total Annual Salary	.00
Date of Birth	08-AUG-1960	<input type="checkbox"/> Prior UAB Service	
Assignment Data			
Assignment Number		Assignment Status	Active Assignment
Assignment Category	99 Requisition	Organization	392300000 Pathology Chair
Job	0137.Lecturer	Position	392300000.88901.040501
FTE	0	Primary	
Assignment Salary	.00	Payroll	Biweekly
<input checked="" type="checkbox"/> Person	<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Assignment	<input checked="" type="checkbox"/> Salary
<input checked="" type="checkbox"/> Element Entries	<input checked="" type="checkbox"/> Labor Sources		
Comments: Presentation of Molecular & Cellular Pathology Series done on Oct 3, 2005 at Bevill Research Bldg., R			
<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"/>			

Appoint, Change, Terminate (ACT) Documentation Part Six: Submitting a New Hire Document for a One Time Requisition Pay Employee

**** **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.

1. Once the document is submitted, and the document status changes to **READY**, the document enters 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**.

The screenshot displays the 'ACT Main Form' interface. It is divided into several sections: Document Information, Person Data, Assignment Data, and a bottom navigation bar. The document is for a 'NEW HIRE' with document number '125701', effective date '03-OCT-2005', and status 'COMPLETE'. The person is 'Clark, Samuel', male, with SSN '444-98-7750'. The assignment is for '0137.Lecturer' at '392300000 Pathology Chair' with a salary of '.00'. The form includes checkboxes for 'Attachments', 'Received', 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources'. A comments field contains the text: 'Presentation of Molecular & Cellular Pathology Series done on Oct 3, 2005 at Bevill Research Bldg., R'. The bottom bar contains buttons for 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

Document Reason	NEW HIRE	Document Number	125701		
Effective Date	03-OCT-2005	Document Status	COMPLETE		
Requestor Name	HALEY	Workflow Type	HIRE		
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	29-SEP-2005 11:15:47		
Person Data					
Name	Clark, Samuel	Gender	Male		
Identification Number	1033573	Ethnic Origin	White / Non Hispanic		
SSN	444-98-7750	Total Active Assignments	1		
Latest Hire Date	03-OCT-2005	Total Annual Salary	.00		
Date of Birth	08-AUG-1960	<input type="checkbox"/> Prior UAB Service			
Assignment Data					
Assignment Number	1033573	Assignment Status	Active Assignment		
Assignment Category	99 Requisition	Organization	392300000 Pathology Chair		
Job	0137.Lecturer	Position	392300000.88901.040501		
FTE	0	Primary			
Assignment Salary	.00	Payroll	Biweekly		
<input checked="" type="checkbox"/> Person	<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Assignment	<input checked="" type="checkbox"/> Salary	<input checked="" type="checkbox"/> Element Entries	<input checked="" type="checkbox"/> Labor Sources
Comments: Presentation of Molecular & Cellular Pathology Series done on Oct 3, 2005 at Bevill Research Bldg., R					
Person Data		Address		Assignment	
Salary		Element Entries		Labor Sources	
Save		Submit		Cancel this document	
Log		Reassign			

2. The requestor of the document will receive an email notification when an employee's **NEW HIRE DOCUMENT** has reached **COMPLETE** status.

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