

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

The Termination Document is used to **TERMINATE** employees from the University. This document reason will terminate **ALL ASSIGNMENTS** held by the employee.

If you are terminating an employees' primary assignment and they have more than one active assignment in the Administrative Systems:

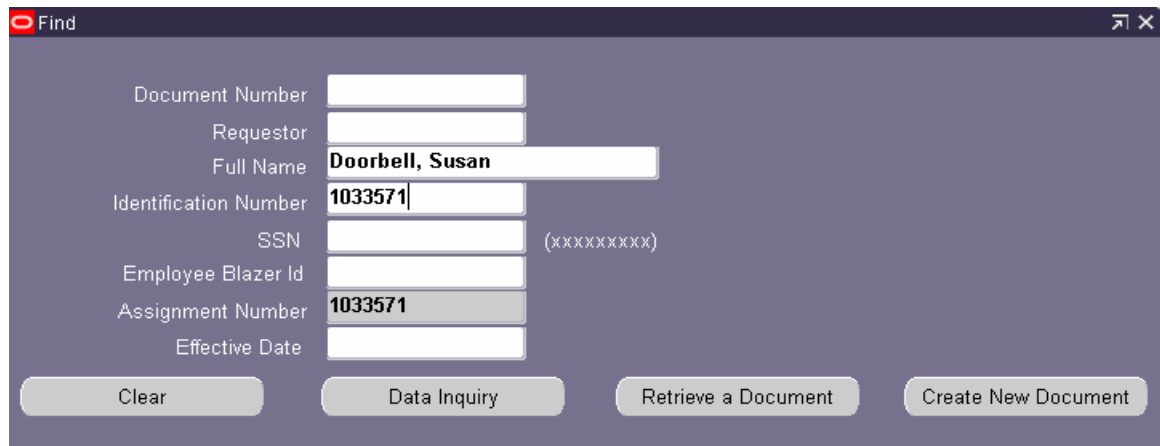
- And the primary assignment is a **benefit eligible** assignment; proceed to create a termination document. **** All assignments must be terminated before Payroll can issue an employees' terminal vacation pay.**
- And the primary assignment is a **non-benefitted** assignment; contact Records Administration for assistance in changing the primary assignment. Once the Primary Assignment has been changed, you will need to end the assignment using an **End Assignment Document**.

To determine whether an assignment is benefit eligible or non-benefitted, [click here](#). (You and UAB Section 2.2)

UAB HR OFFICER → HR Transactions → ACT → Find Window

Creating a Termination Document

1. Use the **FIND** Window to locate the employee, by using either the name of the employee, employee identification number or the employee's social security number.

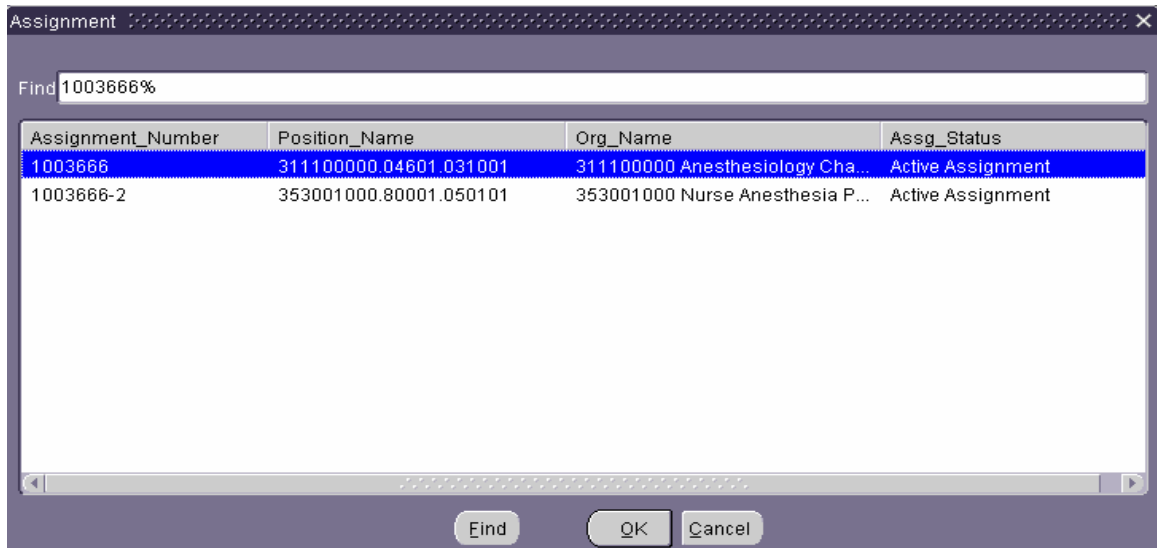


2. Click on the **CREATE NEW DOCUMENT** button.

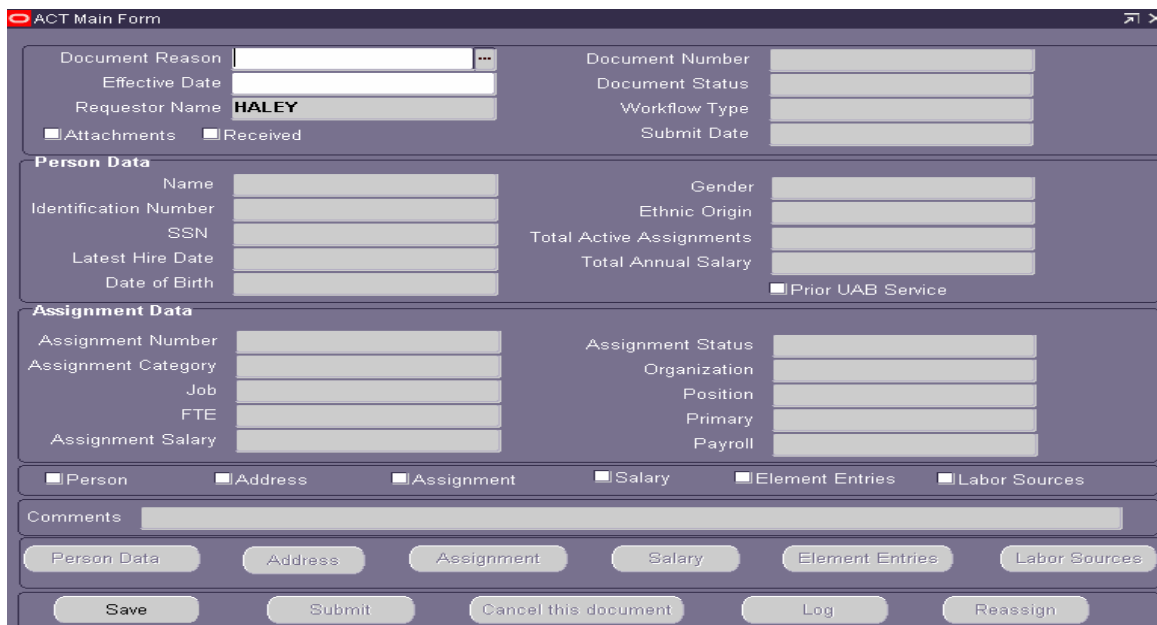
Appoint, Change, Terminate (ACT) Documentation Termination -- Part One: Creating a Termination Document

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

Before submitting a termination document on an employee with multiple assignments, the HR Officer should notify the department(s) in which all additional assignments are affiliated. If an employee's additional assignment is to continue after the termination date, a **Rehire Document** must be completed by the appropriate department to re-establish the assignment. Payroll cannot issue pay for time worked on the additional assignment until the Rehire Document has reached a "COMPLETE" status.



- The **ACT MAIN FORM** opens; click once in the **DOCUMENT REASON** field.



- Using the **DOCUMENT REASON** LOV, choose **Terminate Employee**; Click **OK**.

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

Doc_Reason	Doc_Type
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES
SABBATICAL FULL PAY	LEAVES
SABBATICAL HALF PAY	LEAVES
SALARY SCHEDULE ADJUSTMENT	CHANGE
TERMINATE EMPLOYEE	TERMINATION
TRANSFER LATERAL/DIFFERENT DEPT	CHANGE
TRANSFER LATERAL/SAME DEPT	CHANGE
TRANSFER WITH PROMOTION	CHANGE

5. Click in THE **EFFECTIVE DATE** field. Enter the **Effective Date** of the termination in the **EFFECTIVE DATE** field. **Note: This date cannot be changed once you have submitted the document, Verify you have entered the correct termination date.** Use the calendar LOV or type in the desired date using the **DD-MMM-YY** Format.
6. Click **ATTACHMENTS** box to indicate attachments will be accompanying this termination document. For a list of Attachments to accompany a Termination document, [click here](#).
7. Click on the **SAVE** button at the bottom of the form.

Document Reason	TERMINATE EMPLOYEE	Document Number	125702
Effective Date	20-DEC-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data	
Name	Doorbell, Susan
Gender	Female
Identification Number	1033571
Ethnic Origin	White / Non Hispanic
SSN	410-92-5874
Total Active Assignments	1
Latest Hire Date	05-SEP-2005
Total Annual Salary	31,865.60
Date of Birth	25-FEB-1961
<input type="checkbox"/> Prior UAB Service	

Assignment Data	
Assignment Number	1033571
Assignment Status	Active Assignment
Assignment Category	01 Regular FT
Organization	110400000 University Police
Job	AC100N1.Admin Assoc
Position	110400000.20101.031001
FTE	1
Primary	Y
Assignment Salary	31,865.60
Payroll	Biweekly

Person
 Address
 Assignment
 Salary
 Element Entries
 Labor Sources

Comments

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 WILL NOT be able to 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 Termination -- 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 employee'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 ACT Main Form with the following data:

Document Reason	TERMINATE EMPLOYEE	Document Number	125702
Effective Date	20-DEC-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Doorbell, Susan	Gender	Female
Identification Number	1033571	Ethnic Origin	White / Non Hispanic
SSN	410-92-5874	Total Active Assignments	1
Latest Hire Date	05-SEP-2005	Total Annual Salary	31,865.60
Date of Birth	25-FEB-1961	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1033571	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	110400000 University Police
Job	AC100N1.Admin Assoc	Position	110400000.20101.031001
FTE	1	Primary	Y
Assignment Salary	31,865.60	Payroll	Biweekly

Navigation buttons: Person, Address, Assignment, Salary, Element Entries, Labor Sources

Comments: [Text Area]

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign

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

The screenshot shows the Termination Tab selected, with the following data:

	Current	Proposed
SSN	410-92-5874	
Last Name	Doorbell	
First Name	Susan	
Middle Names		
Suffix		
Title	Ms.	
Date Of Birth	25-FEB-1961	
Gender	FEMALE	

Comments: [Text Area]

Appoint, Change, Terminate (ACT) Documentation Termination -- Part Two: Entering Termination Information

Personal	Employment	Directory	License	Termination
		Current		
Actual Date	<input type="text"/>			
Projected Last Day of Work	<input type="text"/>	Proposed		
Leaving Reason	<input type="text"/>	<input type="text" value="20-DEC-2005"/>		
Rehire Recommendation	<input type="text"/>	<input type="text" value="Yes"/>		
Recommendation Reason	<input type="text"/>	<input type="text"/>		
Comments <input type="text"/>				

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

Note: The Actual Date is pulled from the Document Effective Date. This can be a future date in order to pay the employee through a designated pay period. The Projected Last Day of Work will be the employee'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.

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

Personal	Employment	Directory	License	Termination
		Current		
Actual Date	<input type="text"/>			
Projected Last Day of Work	<input type="text"/>	Proposed		
Leaving Reason	<input type="text"/>	<input type="text" value="20-DEC-2005"/>		
Rehire Recommendation	<input type="text"/>	<input type="text" value="101 Resigned - Voluntary"/>		
Recommendation Reason	<input type="text"/>	<input type="text" value="Yes"/>		
Comments <input type="text"/>				
<input type="button" value="Address"/> <input type="button" value="Schools and Colleges"/> <input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/>				

Appoint, Change, Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

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

Address and Phones (Retrieves a Document)

Full Name: **Doorbell, Susan** Document Reason: **TERMINATE EMPLOYEE**
 Identification Number: **1033571** Document Number: **125702**
 Assignment Number: **1033571** Document Status: **OPEN**
 Effective Date: **20-DEC-2005**

Address

	Current	End Date Current	Proposed
Address Type	Home	<input type="checkbox"/>	Home
Address Line1	32 Finn Way Park		
Address Line2			
Address Line3			
City	Hoover		
State	AL		
Zip Code	35023		

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

Phones

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary	(205) 934-0005	05-SEP-2005
<input type="checkbox"/>	<input type="checkbox"/>	Home	(205) 698-8978	05-SEP-2005

Use the down arrow to create multiple records.

International Address

Comments:

Return to Previous Form Save

3. Click in the **ADDRESS LINE1** field; enter *the employee'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 employee lives*, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

Cities

Find: **Birmingham%**

City	State	Zip Start	Zip End	County
Birmingham	AL	35020	35020	Jefferson
Birmingham	AL	35200	35299	Jefferson
Birmingham	AL	35201	35226	Shelby
Birmingham	AL	35228	35238	Shelby
Birmingham	AL	35240	35240	Shelby
Birmingham	AL	35242	35246	Shelby
Birmingham	AL	35249	35249	Shelby
Birmingham	AL	35253	35255	Shelby
Birmingham	AL	35259	35261	Shelby
Birmingham	AL	35263	35263	Shelby
Birmingham	AL	35266	35266	Shelby
Birmingham	AL	35277	35283	Shelby

Find OK Cancel

Appoint, Change, Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

5. 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.
6. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

Address		Current	End Date Current	Proposed
Address Type	<input type="text" value="Home"/>	<input type="checkbox"/>		<input type="text" value="Home"/>
Address Line1	<input type="text" value="32 Finn Way Park"/>			<input type="text" value="556 Happy Lane"/>
Address Line2	<input type="text"/>			<input type="text"/>
Address Line3	<input type="text"/>			<input type="text"/>
City	<input type="text" value="Hoover"/>			<input type="text" value="Hoover"/>
State	<input type="text" value="AL"/>			<input type="text" value="AL"/>
Zip Code	<input type="text" value="35023"/>			<input type="text" value="35023"/>

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

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.

<input type="checkbox"/> International Address
Comments <input type="text"/>

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

Phones	Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary	(205) 934-0005	05-SEP-2005
<input type="checkbox"/>	<input type="checkbox"/>	Home	(205) 698-8978	05-SEP-2005
<input type="checkbox"/>	<input type="checkbox"/>			

Use the down arrow to create multiple records.

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

Phones	Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary	(205) 934-0005	05-SEP-2005
<input type="checkbox"/>	<input type="checkbox"/>	Home	(205) 698-8978	05-SEP-2005
<input type="checkbox"/>	<input type="checkbox"/>			

Use the down arrow to create multiple records.

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

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

The HR Officer verifies that all information is provided and all attachments are 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. On the **ACT MAIN FORM**, verify a checkmark has been inserted in the checkbox next to **PERSON** and **ADDRESS**.

The screenshot shows the 'ACT Main Form' window with the following data:

Document Reason	TERMINATE EMPLOYEE	Document Number	125702
Effective Date	20-DEC-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Doorbell, Susan	Gender	Female
Identification Number	1033571	Ethnic Origin	White / Non Hispanic
SSN	410-92-5874	Total Active Assignments	1
Latest Hire Date	05-SEP-2005	Total Annual Salary	31,865.60
Date of Birth	25-FEB-1961	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1033571	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	110400000 University Police
Job	AC100N1.Admin Assoc	Position	110400000.20101.031001
FTE	1	Primary	Y
Assignment Salary	31,865.60	Payroll	Biweekly

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

Comments: [Empty text box]

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign

Note: A check will be inserted when **REQUIRED FIELDS** on required screens and tabs have been completed.

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

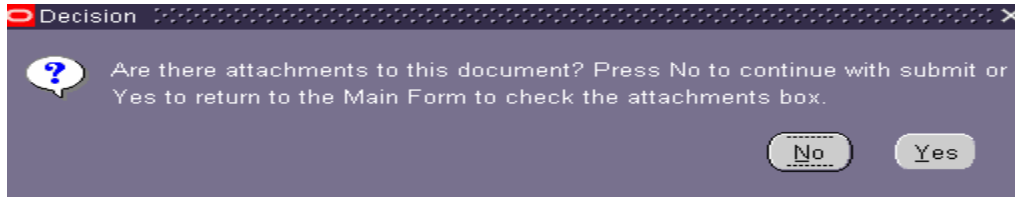
The close-up screenshot shows the 'Attachments' section of the ACT Main Form:

Document Reason	TERMINATE EMPLOYEE
Effective Date	20-DEC-2005
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

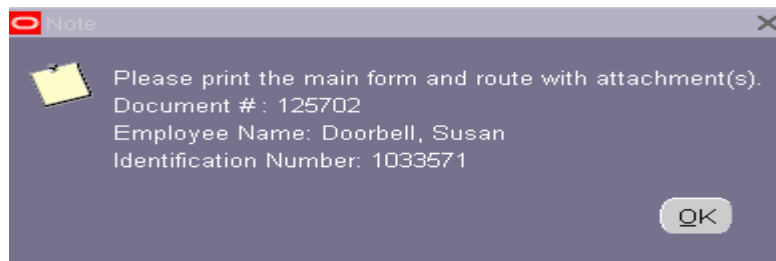
3. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
4. Click the **SUBMIT** button.

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

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



- Click **YES** to return to the **ACT MAIN FORM** and check the **ATTACHMENTS** box and resubmit.
- If you **did** check the **ATTACHMENTS** checkbox, you will see the following message.



- Click **OK** and then print the **ACT MAIN FORM** and attach to the front of attachments that are going to be sent to Central HR.
- The **DOCUMENT STATUS** changes to **READY**.

The screenshot shows the "ACT Main Form" window. It contains several sections of data:

- Document Information:** Document Reason: TERMINATE EMPLOYEE; Effective Date: 20-DEC-2005; Requestor Name: HALEY; Attachments: checked; Received: unchecked; Document Number: 125702; Document Status: READY; Workflow Type: TERMINATION; Submit Date: 30-SEP-2005 16:17:56.
- Person Data:** Name: Doorbell, Susan; Gender: Female; Identification Number: 1033571; Ethnic Origin: White / Non Hispanic; SSN: 410-92-5874; Total Active Assignments: 1; Latest Hire Date: 05-SEP-2005; Total Annual Salary: 31,865.60; Date of Birth: 25-FEB-1961; Prior UAB Service: unchecked.
- Assignment Data:** Assignment Number: 1033571; Assignment Status: Active Assignment; Assignment Category: 01 Regular FT; Organization: 110400000 University Police; Job: AC100N1.Admin Assoc; Position: 110400000.20101.031001; FTE: 1; Primary: Y; Assignment Salary: 31,865.60; Payroll: Biweekly.
- Checkboxes:** Person (checked), Address (checked), Assignment (unchecked), Salary (unchecked), Element Entries (unchecked), Labor Sources (unchecked).
- Comments:** A text area for entering comments.
- Buttons:** Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Save, Submit, Cancel this document, Log, Reassign.

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 Termination -- Part Four: Submitting a Termination Document

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**.

ACT Main Form

Document Reason	TERMINATE EMPLOYEE	Document Number	125702
Effective Date	20-DEC-2005	Document Status	COMPLETE
Requestor Name	HALEY	Workflow Type	TERMINATION
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	30-SEP-2005 16:17:56

Person Data

Name	Doorbell, Susan	Gender	Female
Identification Number	1033571	Ethnic Origin	White / Non Hispanic
SSN	410-92-5874	Total Active Assignments	1
Latest Hire Date	05-SEP-2005	Total Annual Salary	31,865.60
Date of Birth	25-FEB-1961	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1033571	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	110400000 University Police
Job	AC100N1.Admin Assoc	Position	110400000.20101.031001
FTE	1	Primary	Y
Assignment Salary	31,865.60	Payroll	Biweekly

Person Address Assignment Salary Element Entries Labor Sources Capture Image

Comments

Person Data Address Assignment Salary Element Entries Labor Sources

Save Submit Cancel this document Log Reassign