Appoint, Change and Terminate (ACT) Documentation

Termination Document

The Termination Document is used to **TERMINATE** an employee’s “primary” assignment from the University. This document reason will terminate **ALL ASSIGNMENTS** held by the employee.

When terminating an employees’ primary assignment and they **have more than one active assignment** in the Oracle Administrative Systems:

- If 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.**

- If the primary assignment is a **non-benefited** assignment, contact **Records Administration** for assistance in “switching” the primary assignment. Once the primary assignment has been switched, you will need to end the assignment using an **End Assignment** document reason. **Click here** for instructions on how to process an End Assignment ACT document.

To determine whether an assignment is benefit eligible or non-benefited, **click here.** (You and UAB Section 2.2)

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**UAB HR OFFICER → HR Transactions → ACT → Find Window**

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**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.
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.

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

4. Using the DOCUMENT REASON LOV, choose Terminate Employee; Click OK.
5. Click in the **Effective Date** field. Enter the **Effective Date** of the termination in the **EFFECTIVE DATE** field. Use the calendar LOV or type in the desired date using the **DD-MMM-YY** Format.

   **Note:** The **DOCUMENT EFFECTIVE DATE** is the last day the employee is to receive pay from UAB. This date can not be changed once you have submitted the document, verify you have entered the correct effective date.

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.

   **Note:** Once you press the **SAVE** button, you **WILL NOT** be able to change the **DOCUMENT REASON** or **EFFECTIVE DATE**. You will have to cancel the document and start over.
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.

2. Click on the TERMINATION Tab.

3. Click in the PROJECTED LAST DAY OF WORK field, choose the effective date from the Calendar LOV or type in the employee’s actual last day of work.
Note: The Projected Last Day of Work will be the last day the employee will physically be at work.

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

4. Click in the REHIRE RECOMMENDATION field.

5. This field will default to Yes. However, if your organization would not rehire this individual, select No from the LOV.

6. 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.

7. Click the SAVE button. Click on the Return to Previous Form button to return to the ACT Main Form or click on the Address button update the employee's home address.
Appoint, Change and Terminate (ACT) Documentation
Termination -- Part Three: Changing Address Information

The Address button is only available when using a current document effective date and needs to be completed if the employee’s post termination address is different from what currently shows in the Administrative Systems.

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.

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.

Updated 17-OCT-2014
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**.

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**Address**

<table>
<thead>
<tr>
<th>Current</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address Type</strong></td>
<td>Home</td>
</tr>
<tr>
<td><strong>Address Line 1</strong></td>
<td>2501 Jasper Way</td>
</tr>
<tr>
<td><strong>Address Line 2</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 3</strong></td>
<td></td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>Hoover</td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>AL</td>
</tr>
<tr>
<td><strong>Zip Code</strong></td>
<td>35226</td>
</tr>
</tbody>
</table>

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**Phones**

<table>
<thead>
<tr>
<th>Current</th>
<th>Phone Number</th>
<th>Date From</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Fax</strong></td>
<td>(205) 976-0121</td>
<td>23-DEC-2009</td>
</tr>
<tr>
<td><strong>Home</strong></td>
<td>(205) 999-6555</td>
<td>23-DEC-2009</td>
</tr>
<tr>
<td><strong>Campus Primary</strong></td>
<td>(205) 975-6034</td>
<td>23-DEC-2009</td>
</tr>
</tbody>
</table>

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**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.

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

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**Phones**

<table>
<thead>
<tr>
<th>Current</th>
<th>Phone Number</th>
<th>Date From</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Campus Primary</strong></td>
<td>(205) 934-0005</td>
<td>05-SEP-2005</td>
</tr>
<tr>
<td><strong>Home</strong></td>
<td>(205) 681-8578</td>
<td>05-SEP-2005</td>
</tr>
</tbody>
</table>

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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.

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Updated 17-OCT-2014
9. Click on the home date in the DATE FROM section. Enter the effective date of the termination document.

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.
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 if address correction was made.

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.

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

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

   ![Decision](image)

   Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.

   No  Yes

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.

   ![Note](image)

   Please print the main form and route with attachment(s).
   Document #: 536180
   Employee Name: Test, Gladys J.
   Identification Number: 1012732

   OK

8. 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.

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).