Appoint, Change, Terminate (ACT) Documentation
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 for individuals 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***. *(Professional & Consulting Contracting Policy)*

The information entered on the New Hire document 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.

Instructions for completing each individual form on the New Hire document can be accessed by scrolling to the referenced page number or by clicking on the header.

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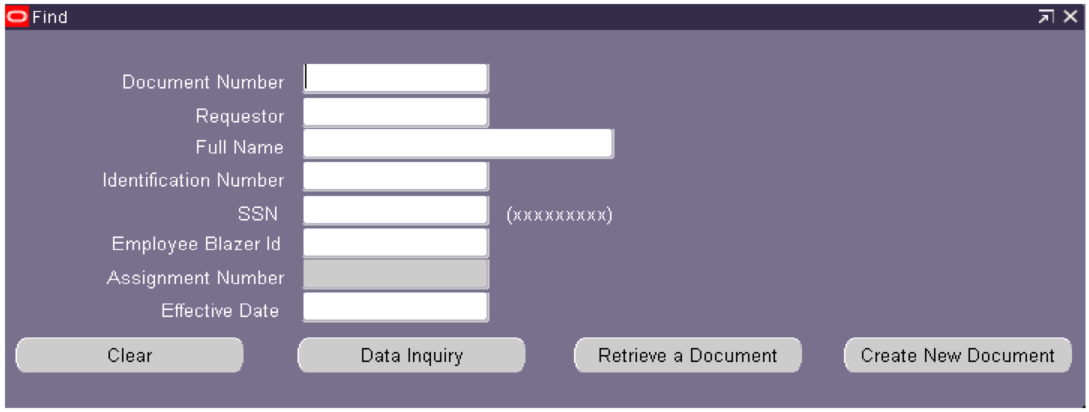
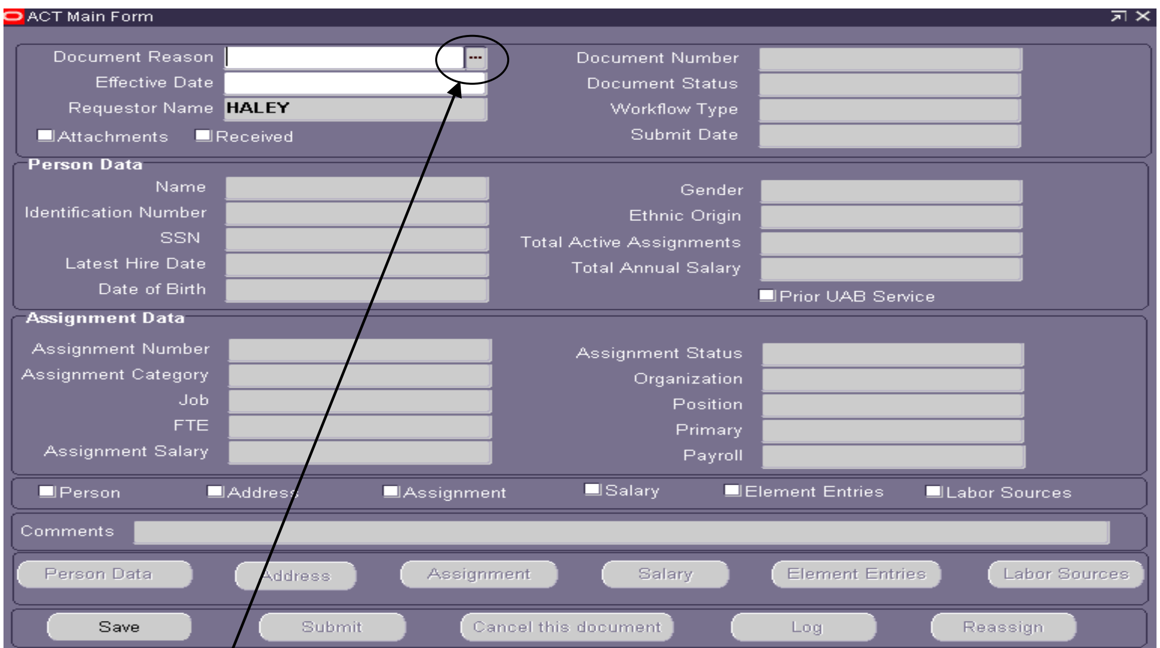
Creating a New Hire Document

1. Selecting **ACT** opens the **ACT FIND** window.

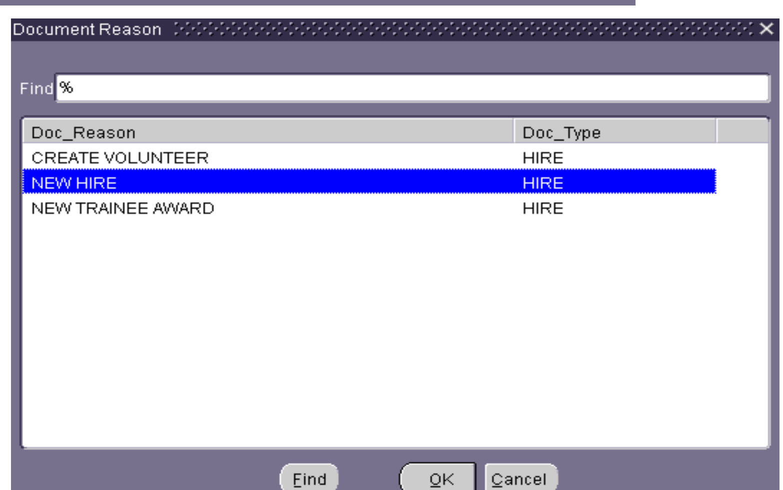


2. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.



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**.



5. Enter the ***Effective Date*** in the **EFFECTIVE DATE** field.

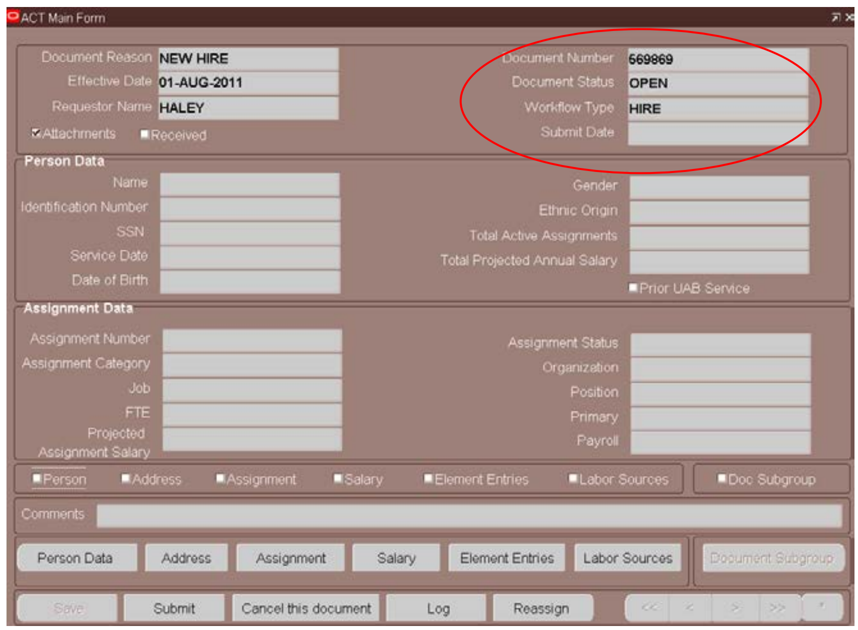
   Note: The effective date should be the first day of the service being provided. This date cannot be changed once you have submitted the document, Verify you have entered the correct hire date. Use the calendar **LOV** or type in the desired date using the ***DD-MMM-YY*** Format.

6. 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***.

7. 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.**



Note: **The DOCUMENT REASON and EFFECTIVE DATE fields are not updatable after clicking on SAVE. If an incorrect DOCUMENT REASON or EFFECTIVE DATE has been entered, the document must be cancelled and a new document created using the correct document reason and/or effective date.**

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

The **Person Data** forms contain 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 are **Personal**, **Employment**, and **Termination** form. The two buttons contain Address and Schools and Colleges data

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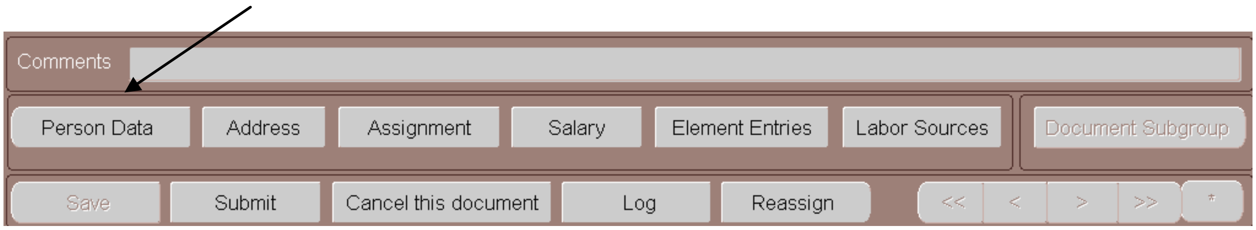
Entering Person Data Information

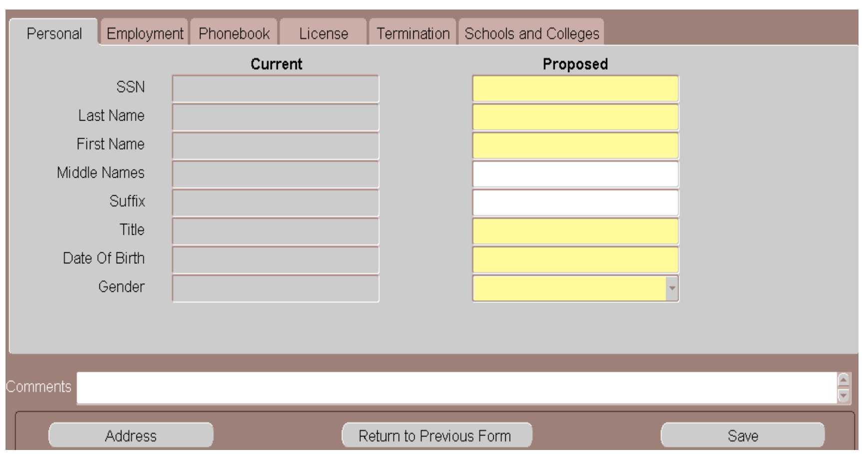
1. Click on the ***Person Data*** tab at the bottom of the ACT Main Form



The **Person Data Screen** opens.

Entering Personal Information

Required fields are yellow and must be completed before you can save the form and move on.



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

2. Enter the ***employee's last name*** exactly as it should appear in the **Last Name** field. Press **TAB** or click in the next field.

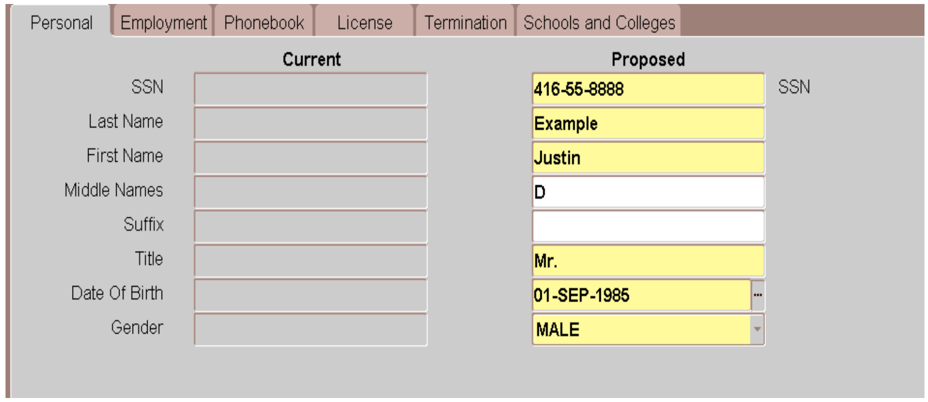
3. Enter the ***employee's first name*** exactly as it should appear in the **First Name** field. Press **TAB** or click in the next field.

4. Enter the ***employee's middle name***, if known, in the **Middle Name** field. Press **TAB** or click in the next field.

5. Enter the ***employee's suffix***, in the **Suffix** field if applicable. ***Example: Sr., Jr., III, etc.*** Press **TAB** or click in the next field.

6. Click once in the **Title** (Mr. Mrs. Miss) field. Choose ***appropriate title*** from LOV or type it directly into the field. ***<u>Once you have selected the title, the Gender field will automatically populate based on title choice</u>***.

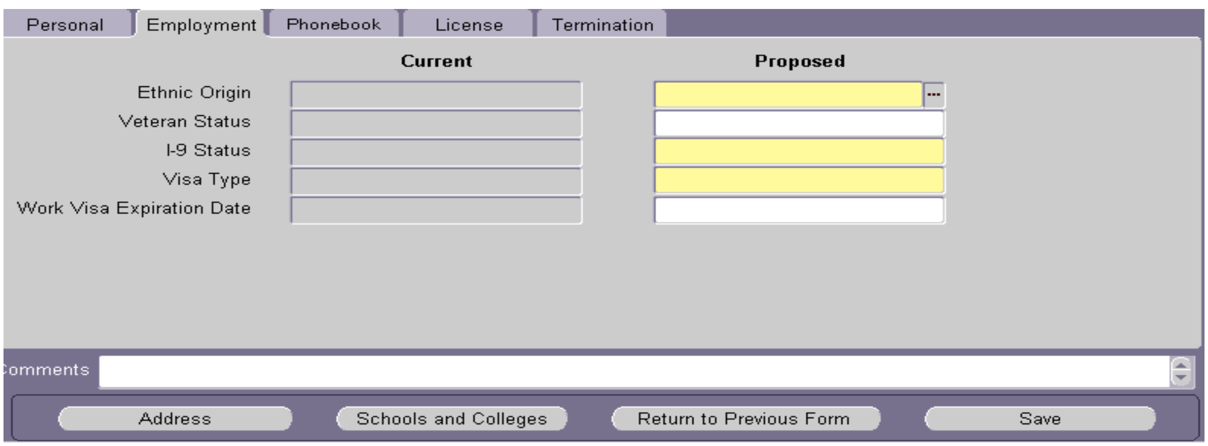
7. Click once in the **Date of Birth** Field. Enter the ***employee's birth date*** using the ***DD-MMM-YY*** format.



8. Click the **Save** button at the bottom of the screen.

9. Once you click the **Save** button, the screen will move to the **Employment** Tab.

<u>Entering Employment Information</u>

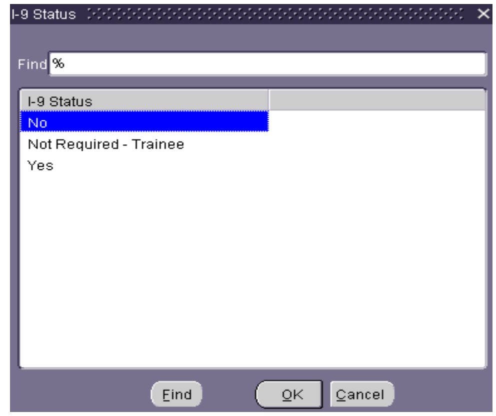


1. In the **Ethnic Origin** field, click the **LOV** and select the ***employee's ethnic origin.*** Click ***OK***.

   <u>Ethnic origin is a required field and must be filled in before you will be allowed to save the document</u>; <u>however, employees do have the ability to update and change this information via the Self Service Application.</u>

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.**

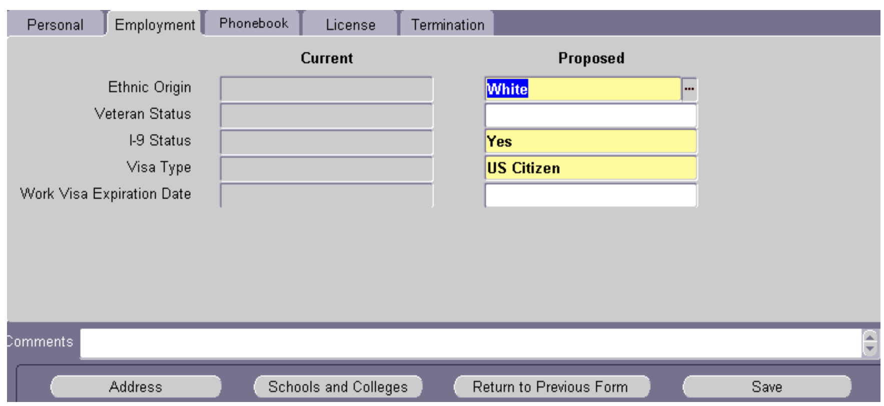
3. In the **I-9 STATUS** field, click the LOV and select the appropriate I-9 Status from the list. Click **OK**. For information regarding I-9's go to Records Administration webpage.
   [Click here.]



***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.**

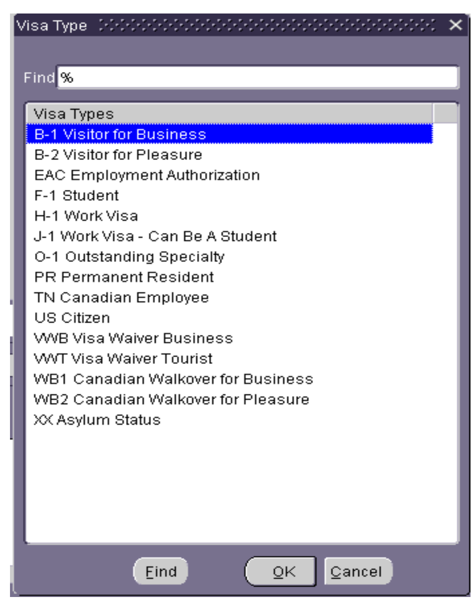
4. In the **VISA TYPE** field click on the LOV.

   a. If the employee was born in the United States and has maintained citizenship in the United States, select **US CITIZEN** from the LOV and click **OK.**

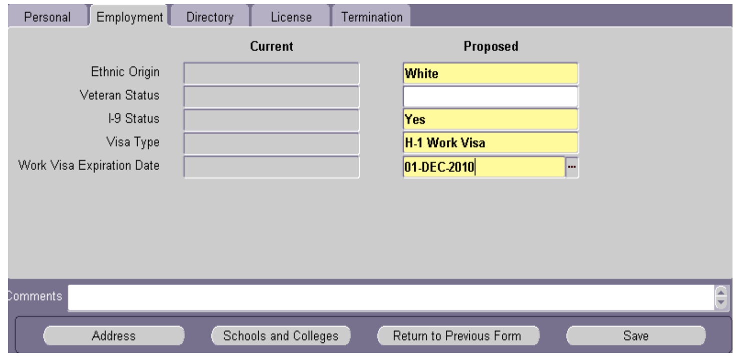


   b. If employee is considered a non-resident alien, select the appropriate ***Visa Type*** from the **LOV** and click **OK**.

   For more information on Visa Types, go to International Scholars Services (ISS) webpage***.***
   [Click here.]



5. When required, enter future ***Work Visa Expiration Date***. Date can be typed directly into the field using the **dd/mmm/yyyy** and must be a ***future*** date.



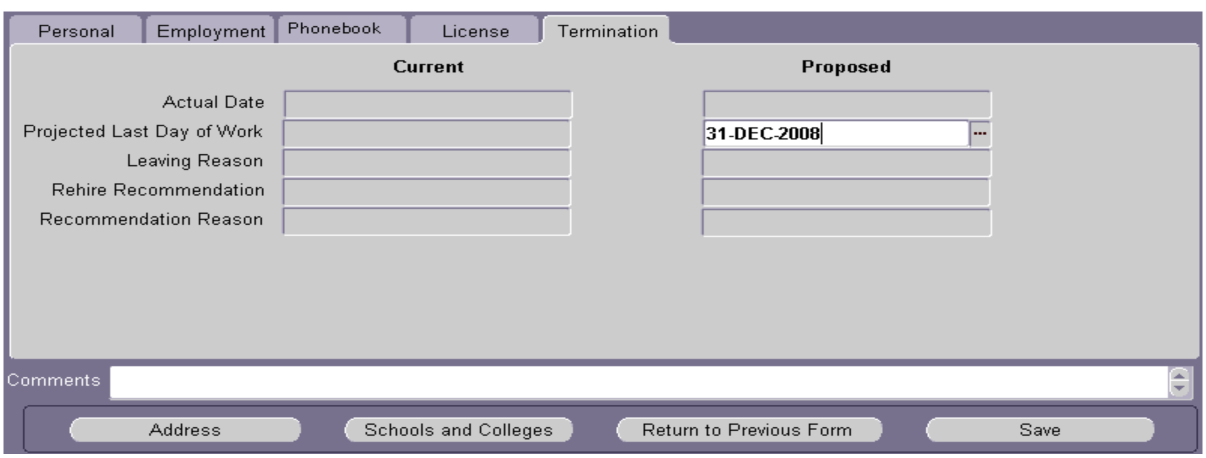
6. Click on the **TERMINATION** tab.

Entering Termination Information

***Note*: The TERMINATION Tab is used when 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.

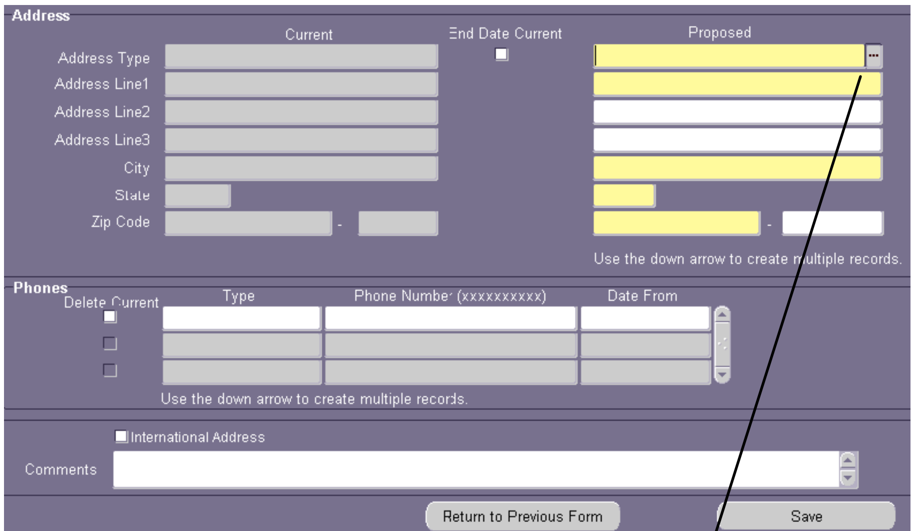
2. Click in the **PROJECTED LAST DAY OF WORK** field; enter the ***Projected Last Day of Work*** from the Calendar LOV or type the date in the field, using the **dd-mmm-yyyy** format.



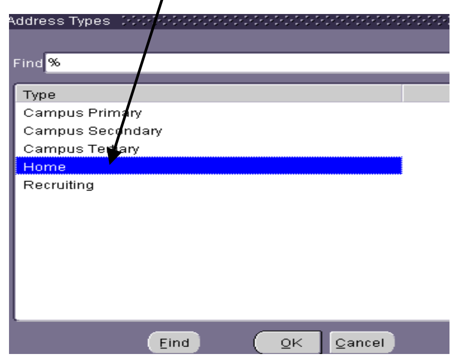
3. Click the **SAVE** button at the bottom of the screen; click the **ADDRESS** button at the bottom of the form.

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.

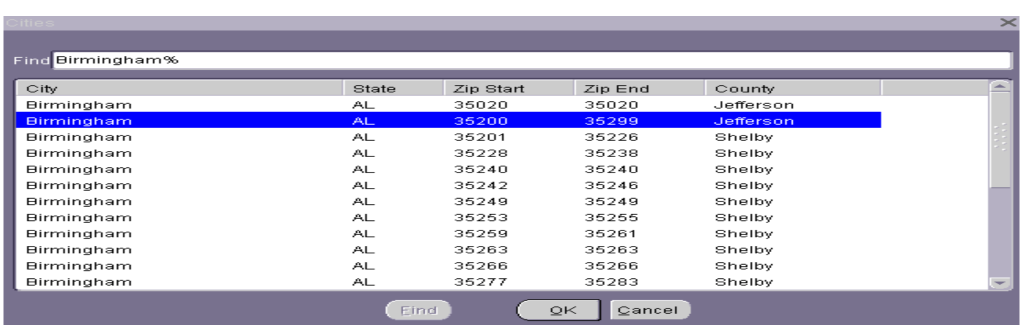


1. Type ***Home*** or make the selection from the LOV in the **ADDRESS TYPE** field. Click **OK.**



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.



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

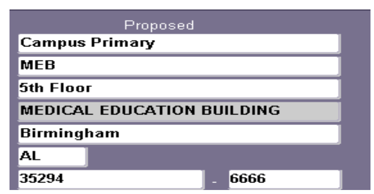
4. Highlight the ***correct zip code range*** for the city and county in which the employee lives. Click ***Ok***. This will populate the City and State field.

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.



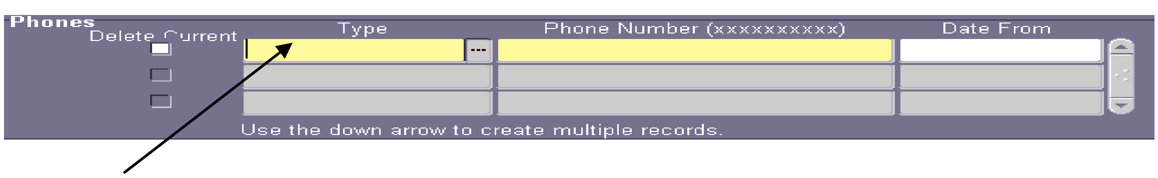
   Note: Building field LOV provides a listing of all UAB Buildings and Building Codes. This is a rather long list so be as specific as possible when trying to locate a building. Using the percent (%) sign and the first letter of the building name will help to limit the list.

8. Enter the ***room or floor number*** in the **Room** field.

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**

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



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.

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.**

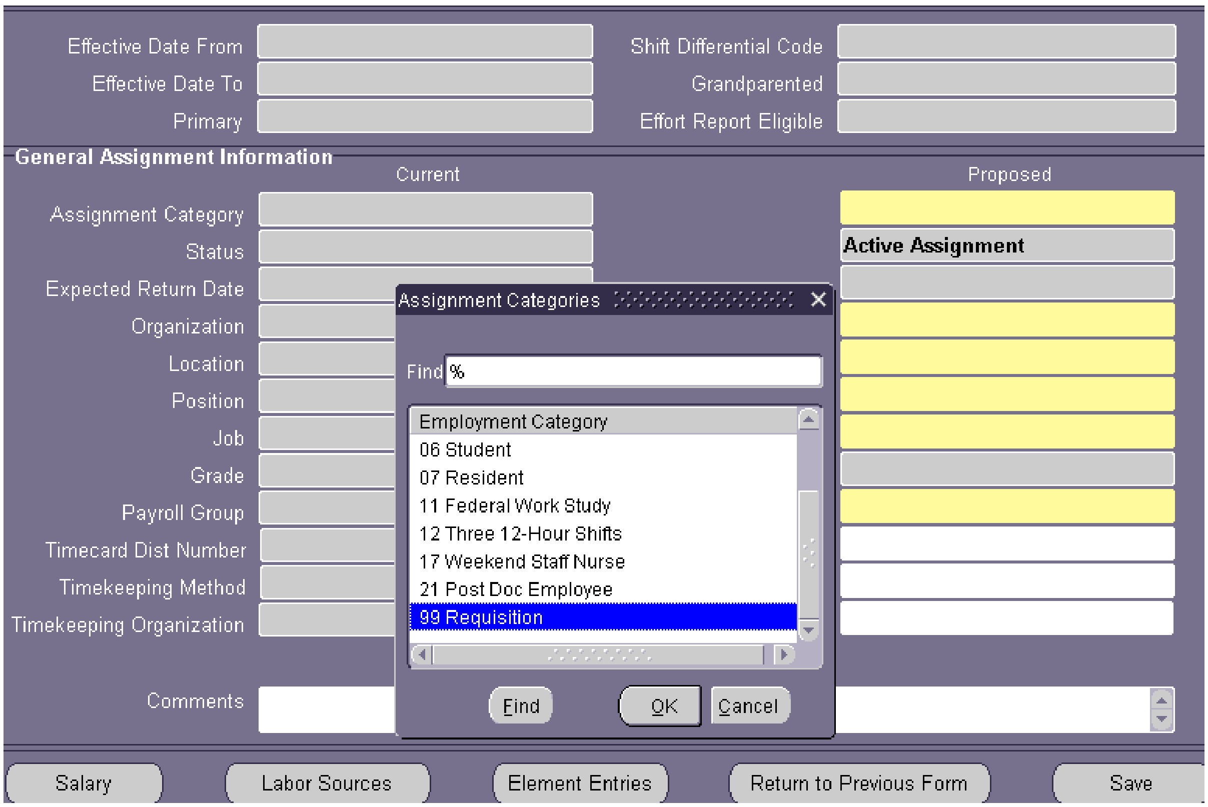
18. Click the **ASSIGNMENT** button at the bottom of the **ACT Main Form**.

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

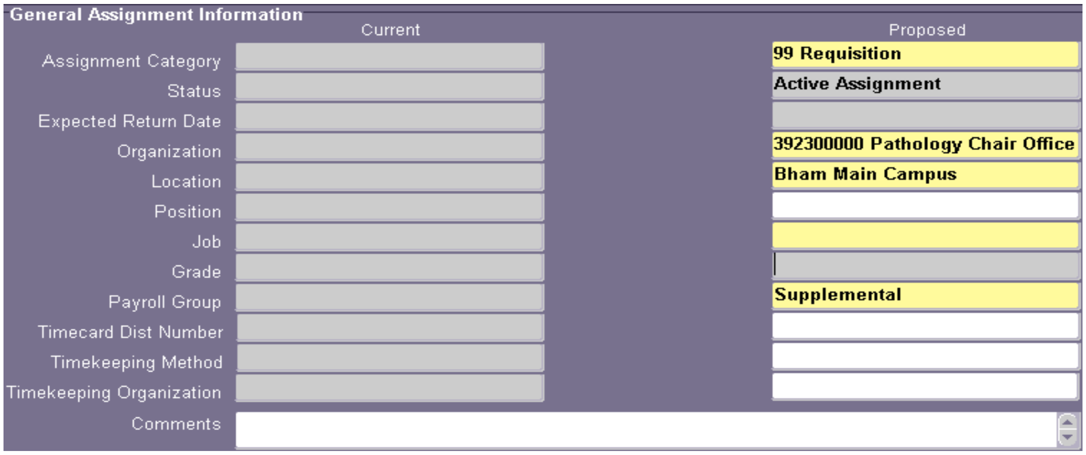
1. Click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**. This will open the **ASSIGNMENT** form.

2. Select ***99 Requisition*** from the **ASSIGNMENT CATEGORY LOV.** Click ***OK***.

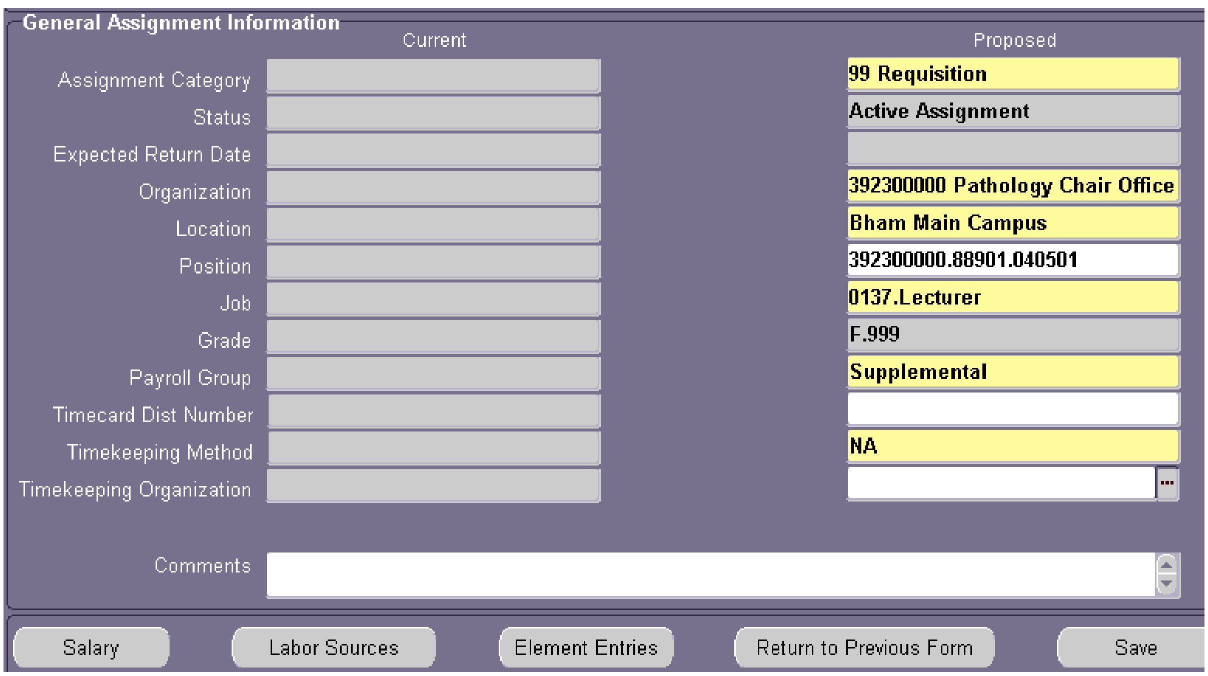


3. Click in the **ORGANIZATION** field; type the ***appropriate organization*** in which the individual will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.

4. The **PAYROLL GROUP** field automatically populates with ***Supplemental***.

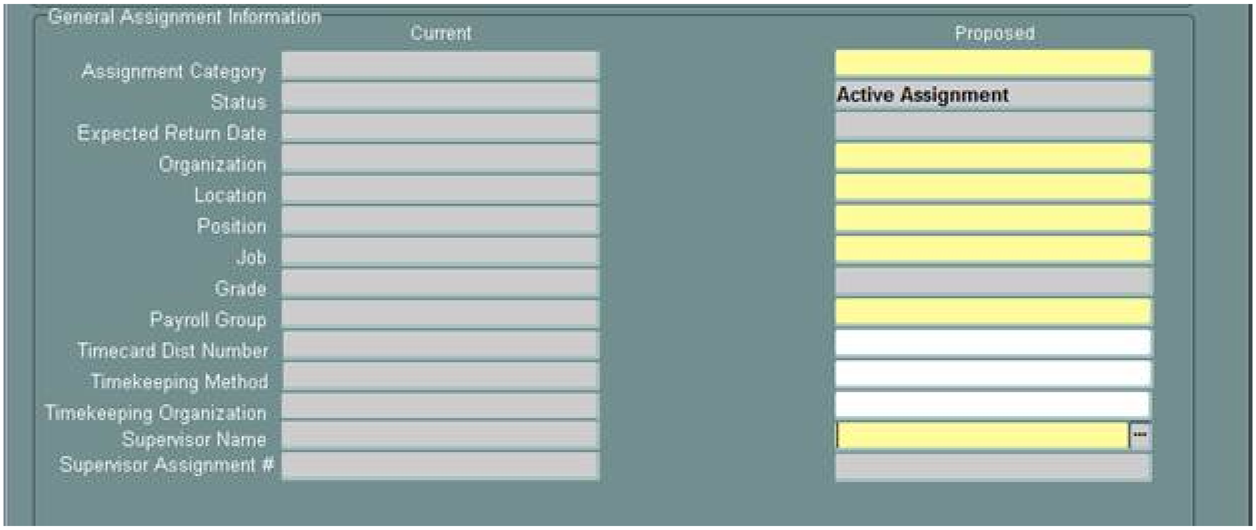


5. Click in the **Position** field; select the ***appropriate position code*** from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization. By entering the correct position, the **Job** field and **Grade** field will be auto populated.

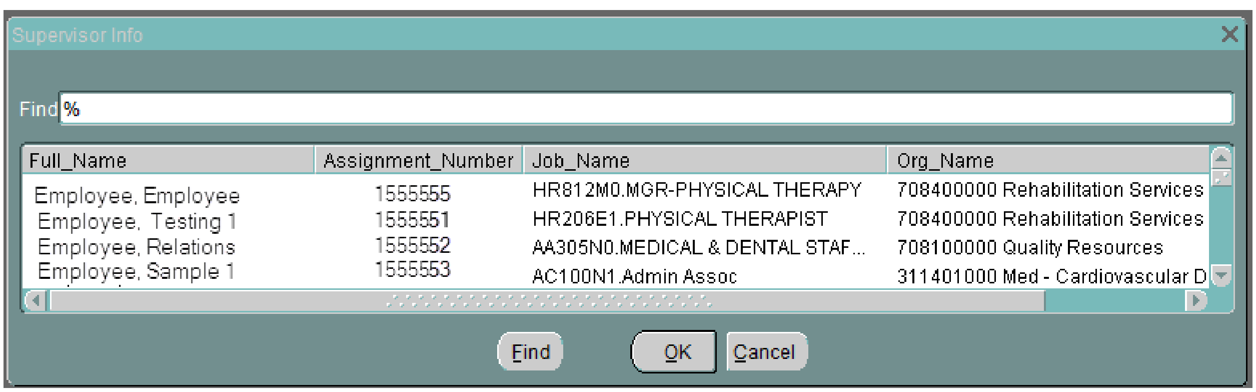


6. Enter **NA** in the **Timekeeping Method** field; or select **NA (not applicable)** from the LOV.

7. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.



Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number.
Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.



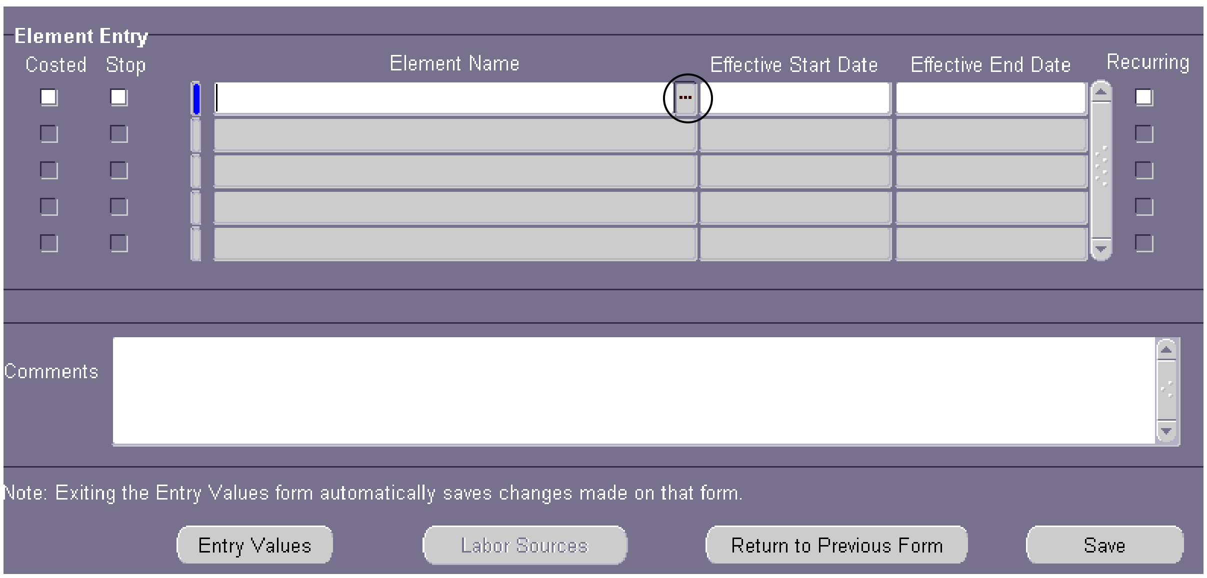
8. Click on the **SAVE** button at the bottom of the screen.

9. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

The information entered on the **ELEMENT ENTRIES** form, is used by Payroll Services to initiate a One Time Payment for the individual being paid for a one time service. Within the **ELEMENT ENTRIES** form 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 Services.

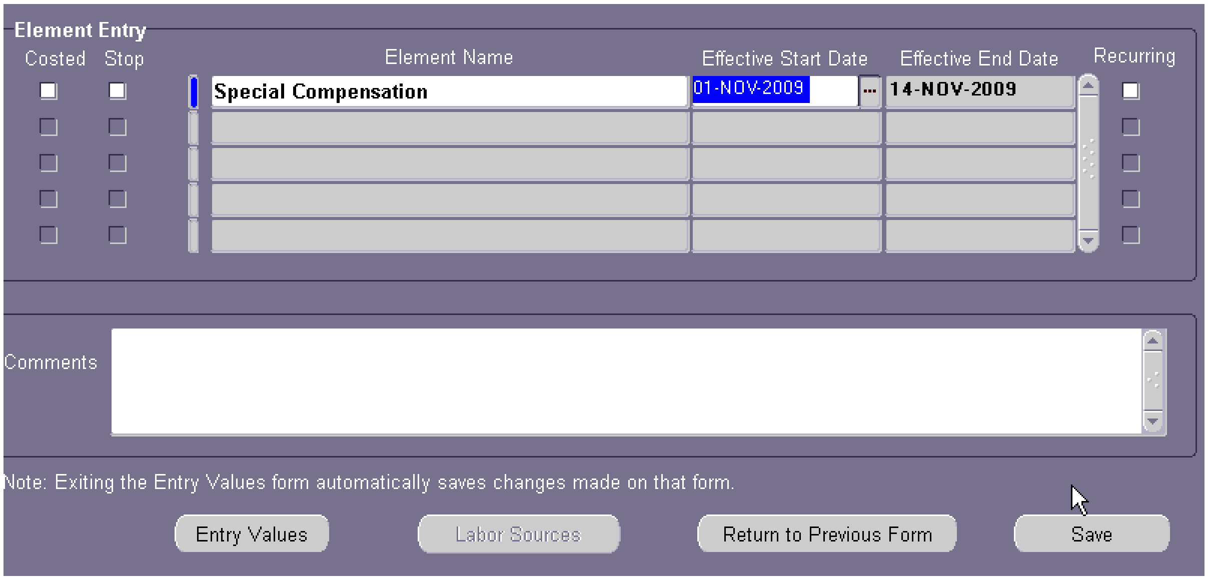
Entering Element Entries

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



2. Click on the LOV for the **ELEMENT NAME** field, and choose ***the appropriate element name.*** For a description of available Element Names and descriptions, go to Financial Affairs webpage. **Click here.**

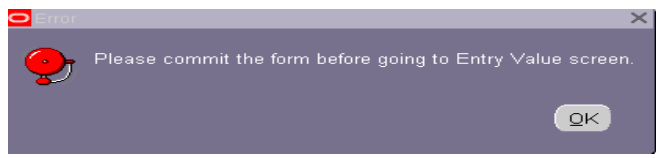
3. The **EFFECTIVE START DATE** will be auto populated with the effective date of the document. The **EFFECTIVE END DATE** will be auto populated with the last day of the payroll period in which the document is to be paid.



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

5. 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***.

6. Click on the **OK** button to return to the **Element** screen; click the **Save** button at the bottom of the form.



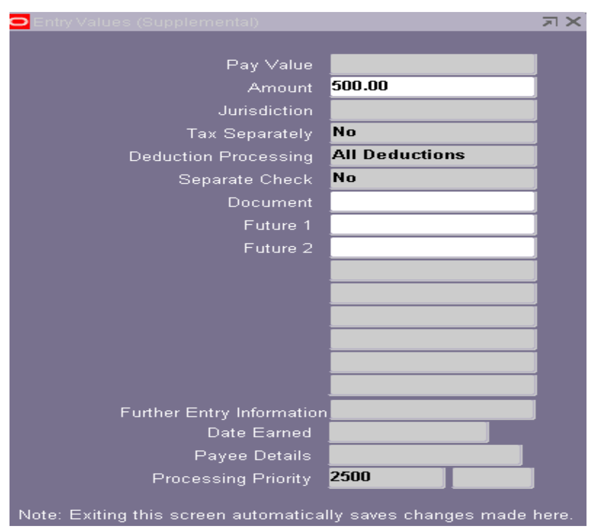
7. Click on the **Entry Value** button at the bottom of the form.

8. The **Entry Values** screen will look similar to the one to the one at the right.

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

10. 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.

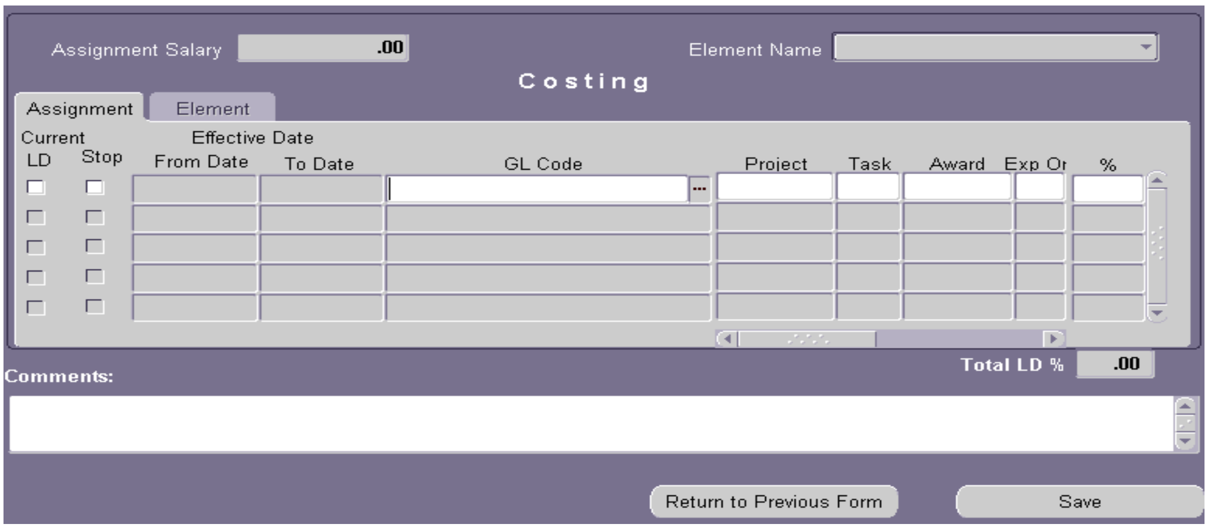


11. From the **Element Entries** form; click on the **Labor Source** button.

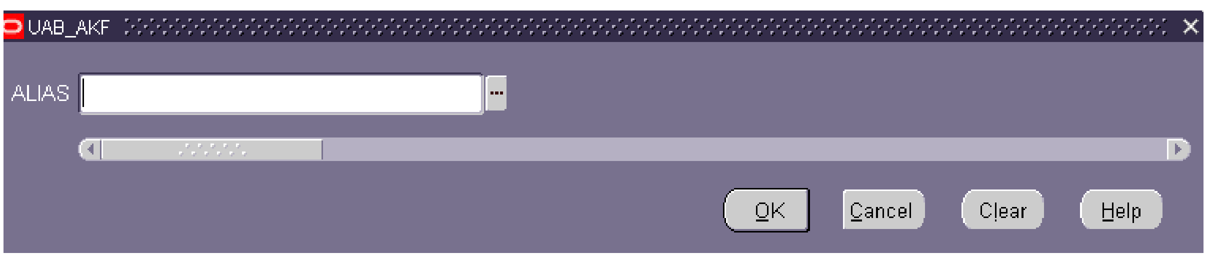
The Labor Source screen indicates what account string the individual's payment will be costed (charged) to.

Entering Labor Source

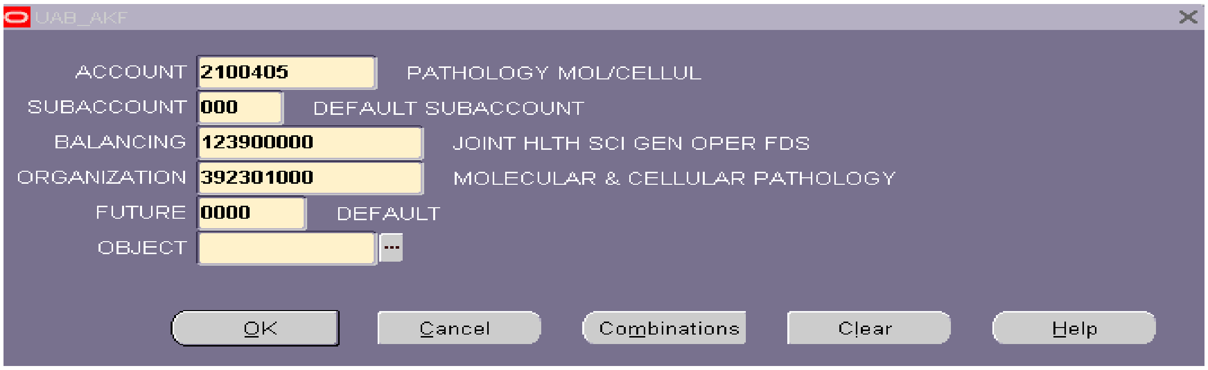
Entering General Ledger (GL) Information



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



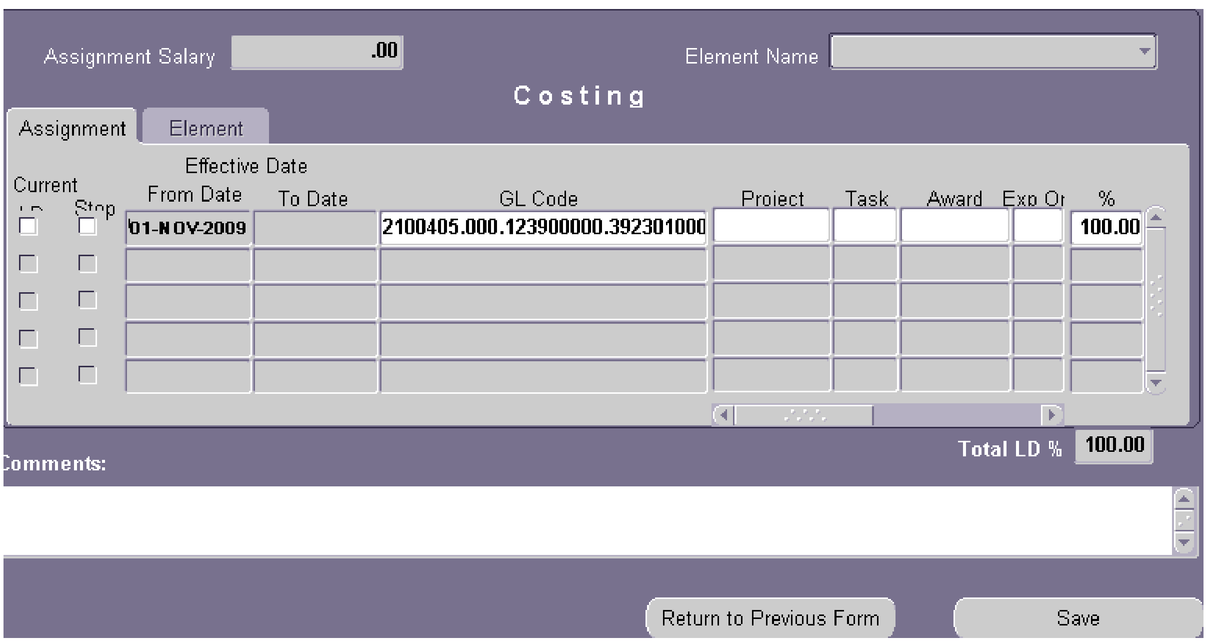
2. Enter the ***ten-digit GL Account number*** in the **ALIAS** field; click **OK**. This opens the window below. All but the **OBJECT** field has been auto populated.



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%.

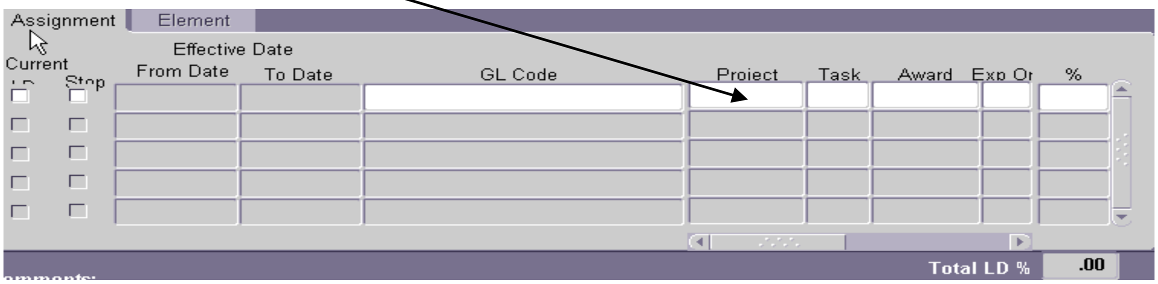


5. Once the **TOTAL LD%** field equals 100%, clicks **SAVE**.

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.



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.

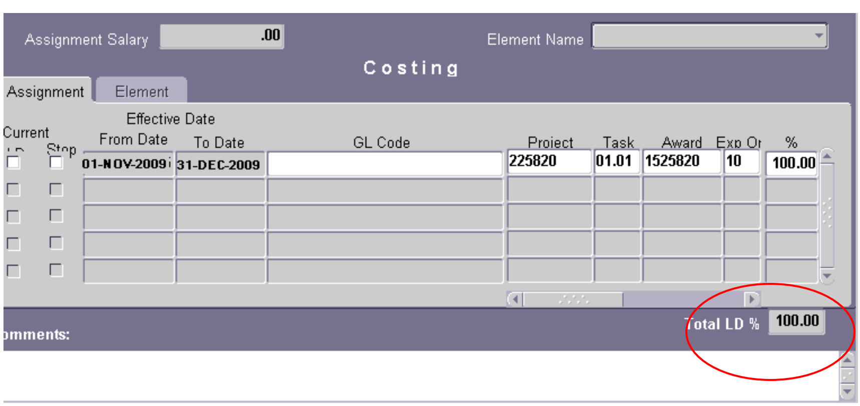
4. Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field.

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.

6. Type the ***percentage of effort*** to be charged in the **(%)** field.

7. Enter ***comments***, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.



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

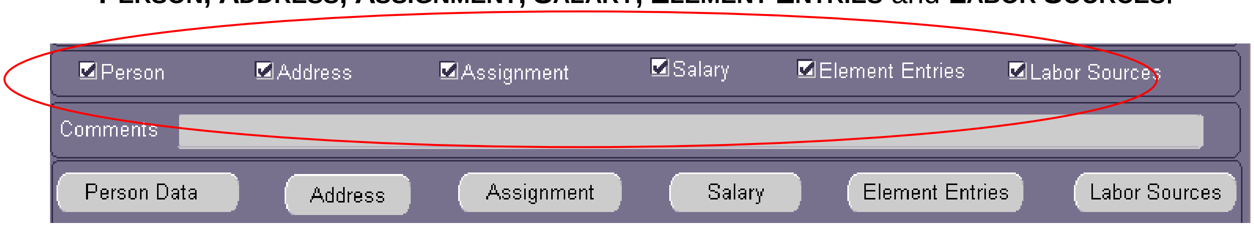
8. Click the **Save** button, then click on the **Return to Previous Form** button. This will return you to back to the **ACT Main Form** window.

9. Click on the **Return to Previous Form** button until you return to the **ACT Main Form**.

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.

Submitting a Complete New Hire Document

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**.



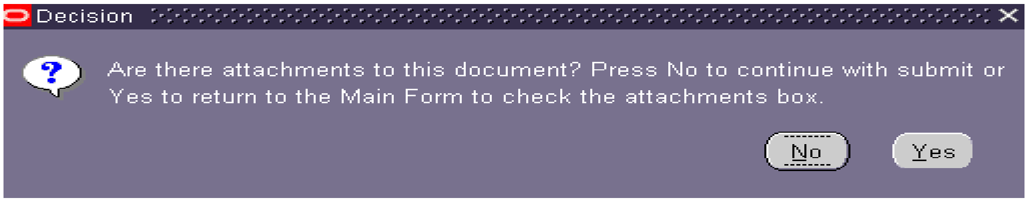
Note: A check will be inserted when REQUIRED FIELDS on all screens and tabs have been completed. All check boxes must be checked.

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.

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.



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).

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

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