

Appoint, Change and Terminate (ACT) Documentation Data Change

The **DATA CHANGE** document is used to insert, update or correct an employee's personnel record in the Administrative System. When using the Data Change document reason the HR Officer will be able to make changes to the following personal information fields when using a current or future document effective date: name, address, phone, schools and colleges, location of assignment, timecard distribution number, timekeeping method, timekeeping organization, and/or changes in FTE within the same assignment category. **Only select fields are available for change when using a retroactive effective date.**

UAB HR Officer → HR Transactions → ACT → Find Window

Creating a Data Change Document

1. Locate the employee using the Find Window.



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

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

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The **ACT MAIN FORM** will open.

ACT Main Form

Document Reason: [Dropdown]
Effective Date: [Text]
Requestor Name: **HALEY**
☐ Attachments ☐ Received
Document Number: [Text]
Document Status: [Text]
Workflow Type: [Text]
Submit Date: [Text]

Person Data
Name: [Text]
Identification Number: [Text]
SSN: [Text]
Service Date: [Text]
Date of Birth: [Text]
Gender: [Text]
Ethnic Origin: [Text]
Total Active Assignments: [Text]
Total Projected Annual Salary: [Text]
☐ Prior UAB Service

Assignment Data
Assignment Number: [Text]
Assignment Category: [Text]
Job: [Text]
FTE: [Text]
Projected Assignment Salary: [Text]
Assignment Status: [Text]
Organization: [Text]
Position: [Text]
Primary: [Text]
Payroll: [Text]

☐ Person ☐ Address ☐ Assignment ☐ Salary ☐ Element Entries ☐ Labor Sources ☐ Doc Subgroup

Comments: [Text Area]

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

Save Submit Cancel this document Log Reassign << < > >> ?

- When the new document opens, click once in the **DOCUMENT REASON** field.
- Use the **DOCUMENT REASON LOV** to choose **DATA CHANGE** or type the words **Data Change** in the **DOCUMENT REASON** field.

Document Reason

Find %

Doc_Reason	Doc_Type
ADDITIONAL ASSIGNMENT	HIRE
BUDGET	BUDGET
CHANGE OF ASSIGNMENT CATEGORY	CHANGE
DATA CHANGE	DATA CHANGE
EDUCATION LEAVE WITH PAY	LEAVES
EDUCATION LEAVE WITHOUT PAY	LEAVES
END A TRAINEE	TERMINATION
END A VOLUNTEER	TERMINATION
END ASSIGNMENT	CHANGE
EQUITY INCREASE	CHANGE
FMLA WITH PAY	LEAVES
FMLA WITHOUT PAY	LEAVES
FUNDING SOURCE CHANGE	COSTING CHANGE
MEDICAL LEAVE WITH PAY	LEAVES
MEDICAL LEAVE WITHOUT PAY	LEAVES

Find OK Cancel

- Click inside the **EFFECTIVE DATE** field, choose an effective date from the **CALENDAR LOV** or **type in the desired date**.
- Click on the **SAVE** button at the bottom of the form.

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Updating Personal Data

To update or change the employee's personal information, click on the **PERSON DATA** button from the **ACT MAIN FORM**.

The screenshot shows the 'ACT Main Form' interface. At the top, there are fields for Document Reason (DATA CHANGE), Effective Date (01-APR-2011), Requestor Name (HALEY), Document Number (536139), Document Status (OPEN), Workflow Type (DATA CHANGE), and Submit Date. Below these are checkboxes for Attachments and Received. The 'Person Data' section contains fields for Name (Example, Sheisa Good), Gender (Female), Identification Number (1044893), Ethnic Origin (White), SSN (789-65-4123), Total Active Assignments (1), Service Date (19-NOV-2007), Total Projected Annual Salary (34,320.00), and Date of Birth (02-SEP-1949). The 'Assignment Data' section includes Assignment Number (1044893), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (352006000 Nutrition Science), Job (CG204N2.Office Assoc II), Position (352006000.21304.101121), FTE (1), Primary (Y), Projected Assignment Salary (34,320.00), and Payroll (Biweekly). A row of checkboxes includes Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. A 'Comments' text area is present. At the bottom, a row of buttons includes Person Data (highlighted with a red box), Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The bottom-most row contains Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

When the **PERSON DATA** form opens, you should be on the **PERSONAL** tab.

Personal Tab

The screenshot shows the 'Personal' tab selected (highlighted with a red box). The form is divided into 'Current' and 'Proposed' columns. The 'Current' column contains fields for SSN (789-65-4123), Last Name (Example), First Name (Sheisa), Middle Names (Good), Suffix, Title (Ms.), Date Of Birth (02-SEP-1949), and Gender (FEMALE). The 'Proposed' column contains empty input fields for the same information. At the bottom, there is a 'Comments' text area and three buttons: Address, Return to Previous Form, and Save.

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1. If necessary, enter the correct information in the appropriate field under the **PROPOSED** column. For Instructions on entering information on the **PERSONAL** tab, [click here](#).

2. If it is necessary to change an employee's gender, click on the **DROP DOWN ARROW** in the **GENDER** field under the **PROPOSED** column. A selection box similar to the one below will open. Select the correct gender.

3. Once all necessary fields have been updated or changed; click on the **SAVE** button; the screen will advance to the **SCHOOLS AND COLLEGES** tab.

Schools and Colleges

When Schools and Colleges information displays, you should verify the information displaying is accurate and up-to-date.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
Jefferson State Community College	000 Not Specified	15-JUN-1968	OD	No	11.07 - Comput
Lawson State Community College	200 Post High School Coursework	17-APR-1997	OD	No	36.0110 - Art.
University of Alabama at Birmingham	402 Bachelor of Arts	15-JUN-1976	HD	No	36.0110 - Art.

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If previous Schools and Colleges information displays and is **accurate**, click on the **SAVE** button located at the bottom of the form.

If previous Schools and Colleges information is **not accurate**, you may:

- Overwrite the existing information.
- Enter additional School or College's, Degree Names, Degree Types by clicking on the next available line.
- Enter Transcript and Degree Discipline information as required.

If Schools and Colleges information does not display, proceed to enter applicable information. For instructions on entering Schools and Colleges information, [click here](#).

Click the **SAVE** button located at the bottom of the form; click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

The screenshot shows the 'Schools and Colleges' tab selected. It contains a table with the following data:

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
Jefferson State Community College	000 Not Specified	15-JUN-1965	OD	No	11.07 - Comput
Lawson State Community College	200 Post High School Coursework	17-APR-1995	OD	No	36.0110 - Art.
University of Alabama at Birmingham	402 Bachelor of Arts	15-JUN-1976	HD	No	36.0110 - Art.

Below the table is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

Employment Tab

If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, [click here](#).

The screenshot shows the 'Employment' tab selected. It contains two columns: 'Current' and 'Proposed'. The 'Current' column has the following data:

	Current
Ethnic Origin	White
Veteran Status	
I-9 Status	Yes
Visa Type	
Work Visa Expiration Date	

The 'Proposed' column has five empty text input fields. Below the columns is a 'Comments' field and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

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- Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

Phonebook Tab

- If necessary, enter the correct information in the appropriate proposed field.

Personal | Employment | Phonebook | License | Termination | Schools and Colleges

Data used for the UAB Electronic Directory

	Current	Proposed
Individual Online List	Yes	
Online Job Title		
Online Display Name		
Faculty and Staff List	Yes	

☐ Assignment Job Title
(Last Name, First Name)
*** Please do not add suffix

Comments: _____

Address | Return to Previous Form | Save

To replace the Job Title displaying in the Electronic Phonebook; check the **Assignment Job Title** check box to populate the **Proposed Online Job Title** field with the official Assignment Job Title; or manually enter a new Job Title

Personal | Employment | Phonebook | License | Termination | Schools and Colleges

Data used for the UAB Electronic Directory

	Current	Proposed
Individual Online List	Yes	
Online Job Title		Office Manager
Online Display Name		Example, Good
Faculty and Staff List	Yes	

☐ Assignment Job Title
(Last Name, First Name)
*** Please do not add suffix

To change the name displaying in the Electronic Phonebook, enter Full Name (using example format) in the **Proposed Online Display Name** field.

- Once all necessary fields have been updated or changed; click on the **SAVE** button, click on the **RETURN TO PREVIOUS FORM**.

License Tab

- If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, [click here](#).

Personal | Employment | Phonebook | License | Termination | Schools and Colleges

License/Certificate/Membership Information

	Current	Proposed
Type		
Title		
Number		
Expiration Date		

Use down arrow to create multiple records.

Comments: _____

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8. Once all necessary fields have been updated or changed; click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

Termination Tab

9. If you have to enter a **Last Day of Work** for this employee, click on the **TERMINATION** tab.

10. Click in the **PROJECTED LAST DAY OF WORK** field. Choose the appropriate date from the **CALENDAR LOV** or type it into the field.
11. Click on the **SAVE** button if you have made changes, then click on the **RETURN TO PREVIOUS FORM**.

Updating Address and Phone Information

To update or change the employee's Address or Phone information, click on the **ADDRESS** button at the bottom of the **ACT MAIN FORM**.

The **ADDRESS AND PHONES** form will open.
For instructions on entering or changing address and phone information, [click here](#).

1. Once **ADDRESS AND PHONE** information has been updated, click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM**.

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Updating Assignment Information

If the individuals work location, timekeeping method are changing or if the individual is being placed on an Alternative Work Schedule, click on the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.

Assignment (Create New Document)

Full Name	Example, Sheisa Good	Document Reason	DATA CHANGE
Identification Number	1044893	Document Number	536150
Assignment Number	1044893	Document Status	OPEN
		Effective Date	01-APR-2011

Effective Date From	07-NOV-2010	Shift Differential Code	NA
Effective Date To	31-DEC-4712	Grandparented	
Primary	Y	Effort Report Eligible	

General Assignment Information		
Current	Proposed	
Assignment Category	01 Regular FT	
Status	Active Assignment	
Expected Return Date		
Organization	352006000 Nutrition Sciences Edu	
Location	Bham Main Campus	
Position	352006000.21304.101121	
Job	CG204N2.Office Assoc II	
Grade	W.G11	
Payroll Group	Staff 12	
Timecard Dist Number		
Timekeeping Method	TEL	
Timekeeping Organization		
Category		
Comments		

Return to Previous Form Save

1. Click in the Proposed **LOCATION** field to change the employees work location.
2. If this is a biweekly assignment, and the employee's timekeeping information is changing:
 - a. If your organization has designated several timekeeper approvers, the Workflow Officer for your organization may have assigned Timecard Distribution Numbers to each timekeeper. If your timekeepers have these numbers, enter the **timecard distribution number** of the person to whom this employee's timesheet should be distributed to in the **TIMECARD DIST NUMBER** field.
 - b. Enter **TAMS** (Hospital employees), **DB** (Design Build employees) or **TEL** (Time Entry, and Labor for the rest of the campus) in the **TIMEKEEPING METHOD FIELD** or use the LOV to enter the information.
 - c. If the timekeeping organization is different from the appointing organization, enter the **organization** in the **TIMEKEEPING ORGANIZATION** field or select it from the LOV.

If this is a monthly assignment, leave the above three fields blank.

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3. If the individual is being placed on an **Alternative Work Schedule**, click on the **LOV** in the **CATEGORY** field; select the appropriate work schedule. Once the appropriate work schedule is selected, click **OK**. [Click here](#) for Oracle processing instructions for Alternative Work Schedules.

General Assignment Information Current

Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	352006000 Nutrition Sciences Edu
Location	Bham Main Campus
Position	352006000.21304.101121
Job	CG204N2.Office Assoc II
Grade	W.G11
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Category	32 Hour Weekly
Comments	

The Location field is available when using a **Retroactive** Document Effective Date. The **CATEGORY** field is available when using **any** Document Effective after **January 1, 2009**.

Return to Previous Form Save

4. Click the **SAVE** button at the bottom of the form.
5. Click on the **RETURN TO PREVIOUS FORM** to return to the **ACT MAIN FORM**.

Updating Salary Information

To change the **FTE** information, click on the **SALARY** button at the bottom of the **ACT MAIN FORM**.

After clicking on the **SALARY** button the following **ERROR** will display.

Note: This error is to inform you, **SALARY COMPONENTS** are not available for change when using the **DATA CHANGE** document reasons. Click **OK**.



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1. Enter the **full-time equivalency** for the employee in the **FTE** field.
2. Enter comments, if applicable, in the **COMMENTS** field.
3. Click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button.

Salary (Create New Document)

Full Name: Example, Sheisa Good
 Identification Number: 1044893
 Assignment Number: 1044893
 Document Reason: DATA CHANGE
 Document Number: 536150
 Document Status: OPEN
 Effective Date: 01-APR-2011

Component Reasons

Reason	Change Value	Change %

Use the down arrow to create multiple records.

	Current	Proposed
Projected Assignment Salary	34,320.00	
Actual Assignment Rate of Pay	16.50	
FTE	1.00	
Hosp Calc Code		
Premium Plan	NA	
Salary Basis	Hourly	
Payroll	Biweekly	
Outside Income Source		
Outside Income		
CFB Code		
Comments		

Change value = Difference in rate of pay.

Return to Previous Form Save

Submitting the Data Change Document

1. Click the **ATTACHMENTS** checkbox on the **ACT MAIN FORM** if attachments are being sent to HRM Records Administration.

ACT Main Form

Document Reason: DATA CHANGE
 Effective Date: 01-APR-2011
 Document Number: 536150
 Document Status: OPEN
 Requester Name: HALEY
 Workflow Type: DATA CHANGE
 Submit Date:
☒ Attachments ☐ Received

☐ Person ☐ Address ☒ Assignment ☒ Salary ☐ Element Entries ☐ Labor Sources ☐ Doc Subgroup

Comments:
 Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

Save Submit Cancel this document Log Reassign << < > >> *

2. Click on the **SUBMIT** button

[Return to Top](#)