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 \rightarrow **HR Transactions** \rightarrow **ACT** \rightarrow **Find Window**

Creating a Data Change Document

1. Locate the employee using the Find Window.

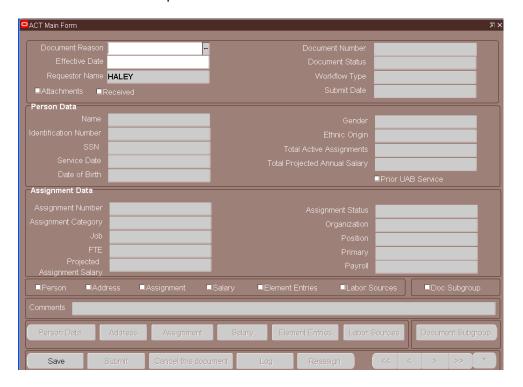


2. Click on the CREATE NEW DOCUMENT button.

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.

The ACT MAIN FORM will open.



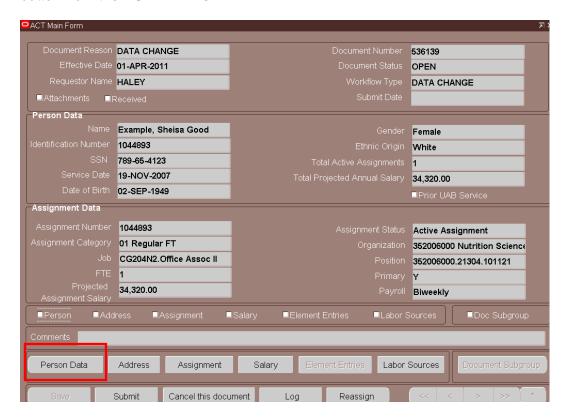
- 3. When the new document opens, click once in the **Document Reason** field.
- 4. Use the **DOCUMENT REASON LOV** to choose **DATA CHANGE** or type the words **Data Change** in the **DOCUMENT REASON** field.



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

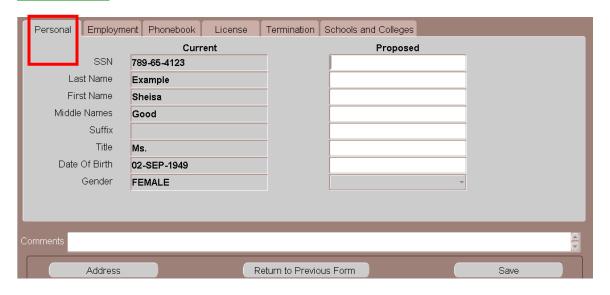
Updating Personal Data

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

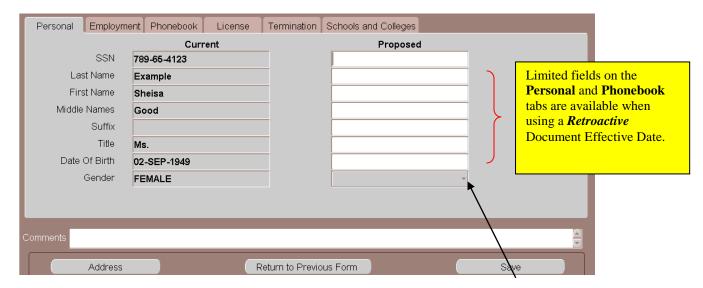


When the **Person Data** form opens, you should be on the **Personal** tab.

Personal Tab



 If necessary, enter the correct information in the appropriate field under the PROPOSED column. For Instructions on entering information on the PERSONAL tab, <u>click here</u>.



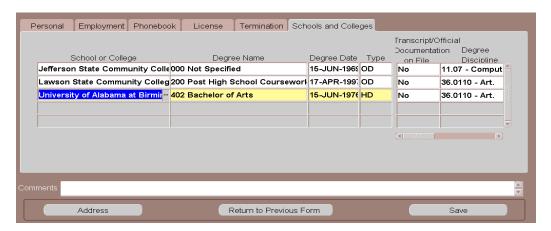
If it is necessary to change an employee's gender, click on the DROP DOWN ARROW in the GENDER field under the PROPOSED column. A selection box similar to the one below will open. Select the correct gender.



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.



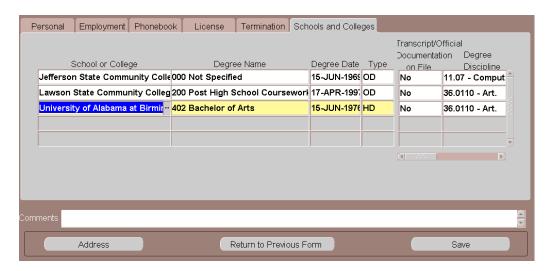
If previous Schools and Colleges information displays and is **accurate**, click on the **SAVE** button located at the bottom of the form.

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

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

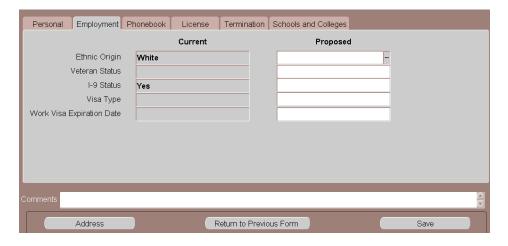
If Schools and Colleges information does not display, proceed to enter applicable information. For instructions on entering Schools and Colleges information, *click here*.

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**.



Employment Tab

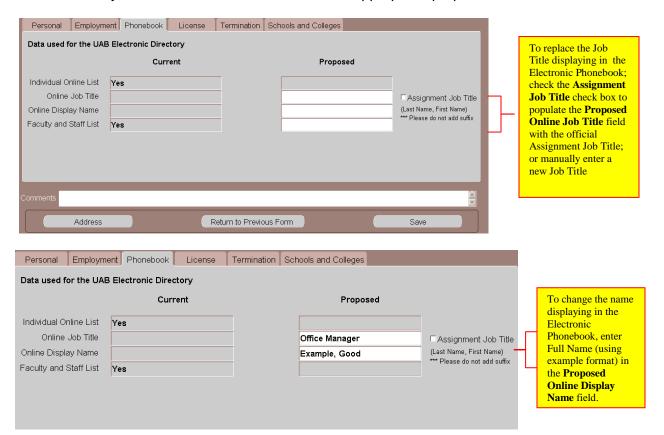
If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, *click here*.



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

Phonebook Tab

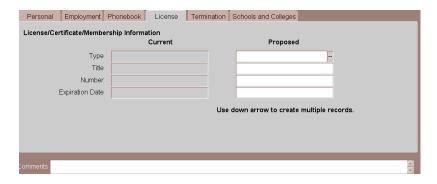
5. If necessary, enter the correct information in the appropriate proposed field.



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

License Tab

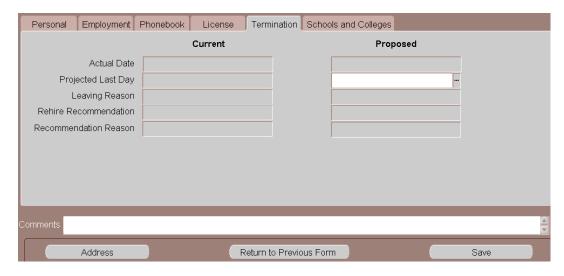
7. If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, *click here*.



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.**

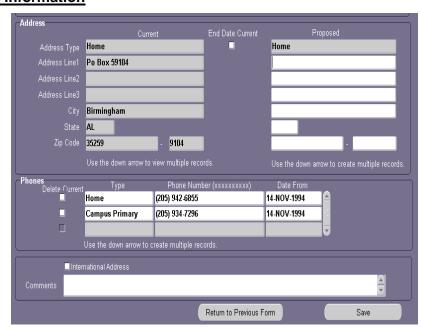
Updating Address and Phone Information

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.

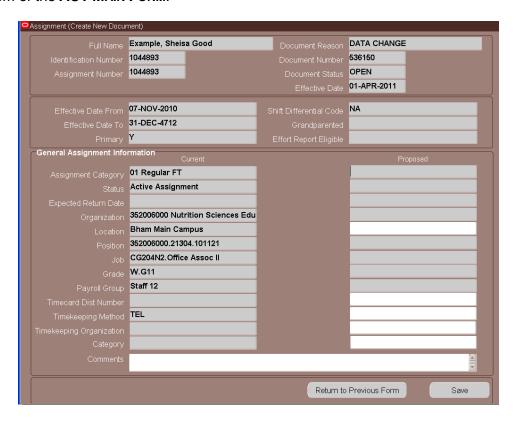
 Once Address and Phone information has been updated, click on the Save button, then click on the RETURN TO PREVIOUS



FORM.

Updating Assignment Information

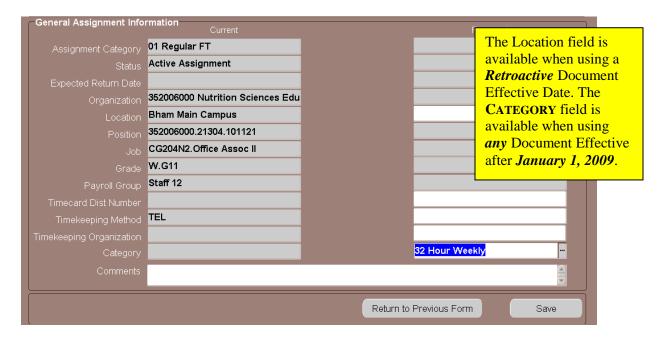
If the individuals work location, timekeeping method are changing or if the individual is being placed on an Alternative Work Schedule, click on the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.



- 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.

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.



- 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

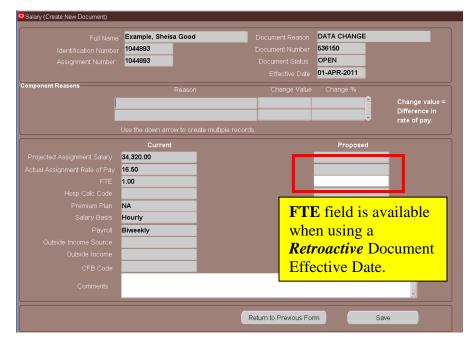
To change the **FTE** information, click on the **SALARY** button at the bottom of the **ACT MAIN FORM.**

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**.

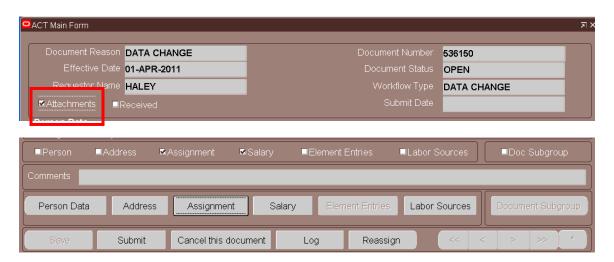


- Enter the full-time equivalency for the employee in the FTE field.
- Enter comments, if applicable, in the COMMENTS field.
- Click on the SAVE button, then click on the RETURN TO PREVIOUS FORM button.



Submitting the Data Change Document

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



2. Click on the SUBMIT button

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