

Appoint, Change and Terminate (ACT) Documentation

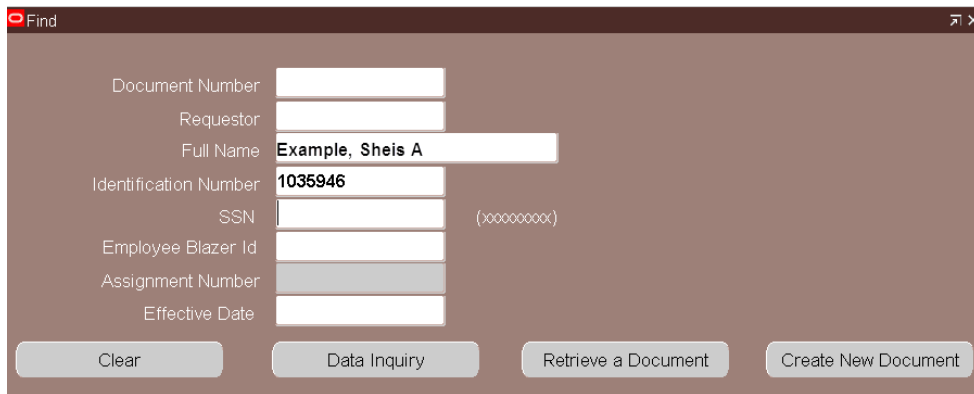
End A Volunteer – Part One: Creating End A Volunteer Document

An End A Volunteer Document is used when an individual with a 60 (Volunteer) Assignment Category terminates their assignment with UAB. This document reason will terminate the Volunteer from the Administrative Systems.

UAB HR Officer → HR Transactions → ACT → Find Window


Creating an End A Volunteer Document

1. Use the **FIND** Window to locate the Volunteer.



The Find window is a search interface with a title bar 'Find' and standard window controls. It contains several input fields for searching: Document Number, Requestor, Full Name (pre-filled with 'Example, Sheis A'), Identification Number (pre-filled with '1035946'), SSN (with a placeholder '(xxxxxxxxx)'), Employee Blazer Id, Assignment Number, and Effective Date. At the bottom, there are four buttons: 'Clear', 'Data Inquiry', 'Retrieve a Document', and 'Create New Document'.

2. Click on the **CREATE NEW DOCUMENT** button.
3. When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.



The ACT Main Form is a complex data entry screen with a title bar 'ACT Main Form' and standard window controls. It is divided into several sections: 'Document Reason' (with a dropdown menu), 'Effective Date', 'Requestor Name' (pre-filled with 'HALEY'), 'Document Number', 'Document Status', 'Workflow Type', 'Submit Date', 'Attachments' (checkbox), and 'Received' (checkbox). Below these are two main sections: 'Person Data' and 'Assignment Data'. 'Person Data' includes fields for Name, Identification Number, SSN, Service Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Projected Total Annual Salary, and a 'Prior UAB Service' checkbox. 'Assignment Data' includes fields for Assignment Number, Assignment Category, Job, FTE, Projected Annual Salary, Assignment Status, Organization, Position, Primary, and Payroll. At the bottom, there are checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources', followed by a 'Comments' text area. The bottom of the form features a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', and 'Labor Sources', and a final row of buttons: 'Save', 'Submit', 'Cancel this document', 'Log', and 'Reassign'.

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- Use the **DOCUMENT REASON** LOV to **CHOOSE END A VOLUNTEER** or type the words **End A Volunteer** in the **DOCUMENT REASON** field. Click **OK**.

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

- Click in the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or **type in the desired date**. Remember to use the **DD-MMM-YY** format.

ACT Main Form

Document Reason: **END A VOLUNTEER**

Effective Date: **31-MAR-2011**

Requestor Name: **HALEY**

☐ Attachments ☐ Received

- Click **ATTACHMENTS** box if attachments will be accompanying this End A Volunteer document. For a list of Attachments to accompany an End A Volunteer document, [click here](#).
- Click on the **SAVE** button at the bottom of the form.

ACT Main Form

Document Reason: **END A VOLUNTEER** | Document Number: **536189**

Effective Date: **31-MAR-2011** | Document Status: **OPEN**

Requestor Name: **HALEY** | Workflow Type: **TERMINATION**

☐ Attachments ☐ Received | Submit Date:

Person Data

Name: **Example, Sheis A** | Gender: **Female**

Identification Number: **1035946** | Ethnic Origin: **Black or African American**

SSN: | Total Active Assignments: **1**

Service Date: **13-APR-2009** | Total Projected Annual Salary: **.00**

Date of Birth: **21-SEP-1959** | ☒ Prior UAB Service

Assignment Data

Assignment Number: **1035946-2** | Assignment Status: **Active Assignment**

Assignment Category: **60 Volunteer** | Organization: **352001000 Nutr Sci - Clin Ni**

Job: **Q014.Volunteer** | Position: **352001000.85001.051201**

FTE: | Primary: **Y**

Projected Assignment Salary: **.00** | Payroll:

☐ 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 | << < > >> *

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End A Volunteer – 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 Volunteer'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.

Current		Proposed	
Actual Date		31-MAR-2011	
Projected Last Day			
Leaving Reason			
Rehire Recommendation	Yes	Yes	
Recommendation Reason			

Comments

Address Return to Previous Form Save

3. 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. The Projected Last Day of Work will be the Volunteer's actual last day of working at UAB.

4. Click in the **LEAVING REASON** field; select *the appropriate reason* from the LOV.
5. Click in the **REHIRE RECOMMENDATION** field.
6. This field will default to **Yes**. However, if your organization would not rehire this individual, select **No** from the LOV.
7. 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.

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Personal		Employment		Phonebook		License		Termination		Schools and Colleges	
						Current		Proposed			
Actual Date								31-MAR-2011			
Projected Last Day								31-MAR-2011			
Leaving Reason								101 Resigned - Voluntary			
Rehire Recommendation						Yes		Yes			
Recommendation Reason											
Comments											
Address				Return to Previous Form				Save			

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

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End A Volunteer – Part Three: Changing Address Information

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

The screenshot shows the 'Address' and 'Phones' sections of the ACT system form. The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type (Home), Address Line1 (401- A Coliseum Blvd), Address Line2, Address Line3, City (Montgomery), State (AL), and Zip Code (36109). The 'Proposed' column has corresponding empty fields. Below these fields are instructions: 'Use the down arrow to view multiple records.' and 'Use the down arrow to create multiple records.' The 'Phones' section has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. There are two rows: one for 'Campus Primary' with phone number '(205) 934-3006' and date '06-JAN-2006', and one for 'Home' with phone number '(334) 271-1618' and date '06-JAN-2006'. Below the table is the instruction: 'Use the down arrow to create multiple records.' At the bottom of the form is a checkbox for 'International Address' and a 'Comments' text area. At the very bottom are two buttons: 'Return to Previous Form' and 'Save'.

Address		Current	End Date	Current	Proposed
Address Type		Home	<input type="checkbox"/>		Home
Address Line1		401- A Coliseum Blvd			
Address Line2					
Address Line3					
City		Montgomery			
State		AL			
Zip Code		36109			

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"/>			Campus Primary	(205) 934-3006	06-JAN-2006
<input type="checkbox"/>			Home	(334) 271-1618	06-JAN-2006
<input type="checkbox"/>					

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 Volunteer'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 Volunteer lives*, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.
5. Highlight the *correct zip code range* for the city and county in which the Volunteer 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**.
Note: If the Volunteer 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,

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Street Address on Address Line 2 and the building and room number on Address Line 3.

International Address ☐

Comments

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

Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 978-0628	01-MAR-2005
<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 **Volunteer'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 document**.

Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 666-9999	25-OCT-2005
<input type="checkbox"/>			

Use the down arrow to create multiple records.

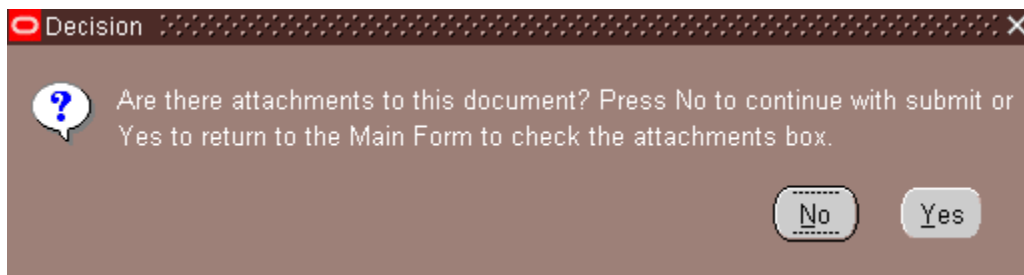
10. Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
11. Click on the **SAVE** button.
12. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

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End A Volunteer - Part Four: Submitting a End A Volunteer Document

The HR Officer verifies that all information is correct and the document is 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. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



3. Click **No** to continue since Attachments are not required for an End A Volunteer Document.
4. The **DOCUMENT STATUS** changes to **READY**.

A screenshot of the 'ACT Main Form' window. It displays various fields for document information. On the left, there are checkboxes for 'Attachments' and 'Received'. The main area contains several fields with their values: Document Reason (END A VOLUNTEER), Effective Date (31-MAR-2011), Requestor Name (HALEY), Document Number (536189), Document Status (READY), Workflow Type (TERMINATION), and Submit Date (23-MAR-2011 16:28:58).

Document Reason	END A VOLUNTEER	Document Number	536189
Effective Date	31-MAR-2011	Document Status	READY
Requestor Name	HALEY	Workflow Type	TERMINATION
Submit Date	23-MAR-2011 16:28:58		

Note: Once the Document Status changes to **READY**, all fields on all the forms will turn gray (inquiry or ready only).

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**.

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