

Appoint, Change and Terminate (ACT) Documentation

New Hire ACT Document

The **New Hire** ACT document reason is used to **appoint new employees** who have **never** been affiliated with UAB in an active employee, trainee or volunteer status in the past.

The information entered on the **New Hire** document provides the data needed for the employee to be paid. It also creates the official personnel record for that individual. While it may seem to be a rather lengthy process, much of the data is used for reporting throughout the University and to external agencies. Therefore, providing as much data as possible and ensuring its accuracy is important. It is recommended before starting this procedure, you have all of the relevant information in front of you, and that you complete it in sequential order.

Instructions for completing each form on the New Hire Document can be accessed by scrolling to the referenced page number.

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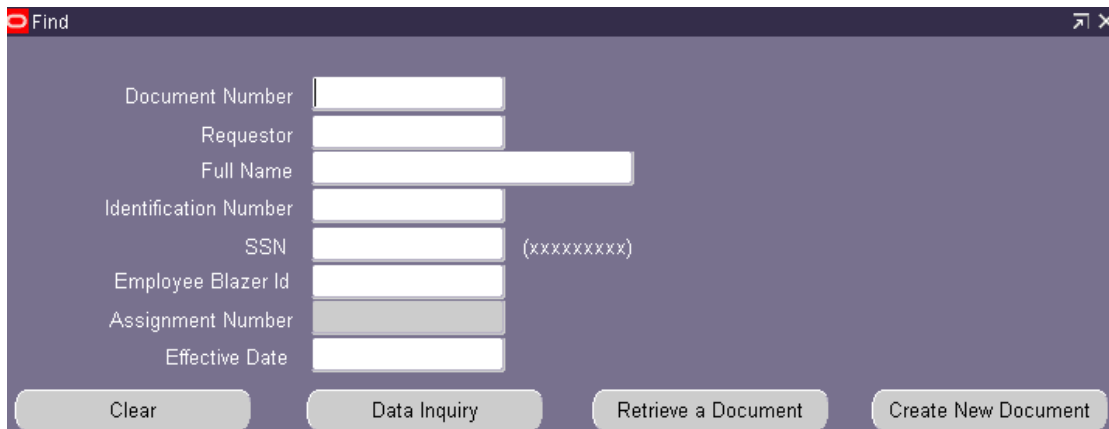
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New Hire ACT Document

UAB HR Officer → HR Transactions → ACT → Find Window

Creating a New Hire ACT Document

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

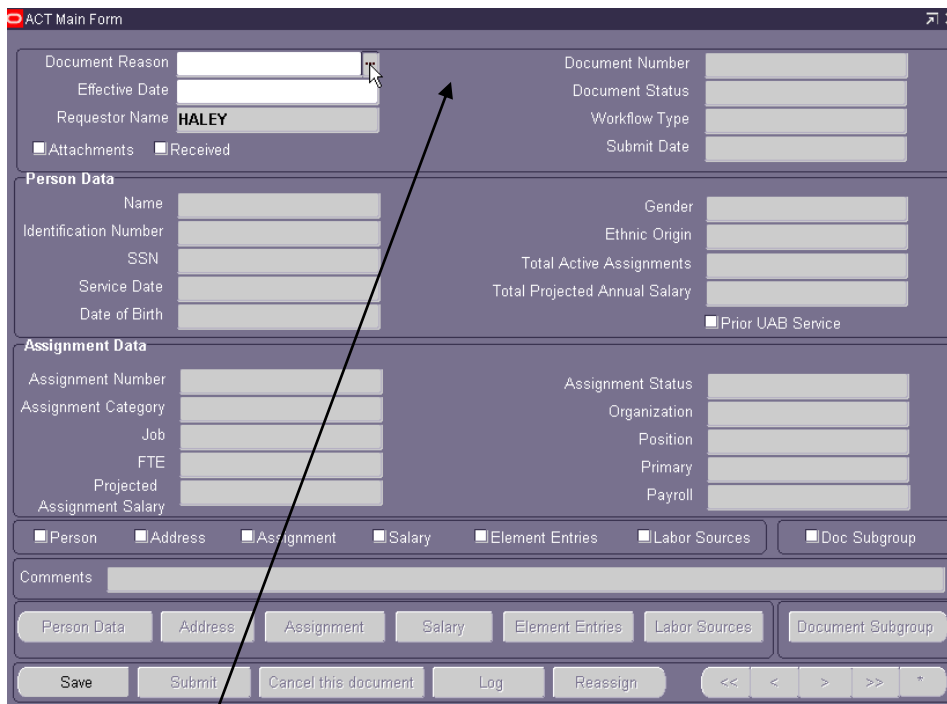


The screenshot shows the 'Find' window with the following fields and buttons:

Field	Value/Placeholder
Document Number	
Requestor	
Full Name	
Identification Number	
SSN	(xxxxxxxx)
Employee Blazer Id	
Assignment Number	
Effective Date	

Buttons at the bottom: Clear, Data Inquiry, Retrieve a Document, Create New Document

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



The screenshot shows the 'ACT Main Form' with the following sections and fields:

Document Reason (with a LOV box) | **Document Number** | **Document Status**

Effective Date | **Workflow Type** | **Submit Date**

Requestor Name (HALEY) | **Attachments** | **Received**

Person Data

Field	Value/Placeholder
Name	
Identification Number	
SSN	
Service Date	
Date of Birth	
Gender	
Ethnic Origin	
Total Active Assignments	
Total Projected Annual Salary	
<input type="checkbox"/> Prior UAB Service	

Assignment Data

Field	Value/Placeholder
Assignment Number	
Assignment Category	
Job	
FTE	
Projected Assignment Salary	
Assignment Status	
Organization	
Position	
Primary	
Payroll	

Person | **Address** | **Assignment** | **Salary** | **Element Entries** | **Labor Sources** | **Doc Subgroup**

Comments

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

Buttons: Save, Submit, Cancel this document, Log, Reassign, <<, <, >, >>, *

3. Click on the **LOV** box in the **DOCUMENT REASON** field.

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4. The **DOCUMENT REASON** window displays. Select **NEW HIRE** and click **OK**.

Doc_Reason	Doc_Type
CREATE VOLUNTEER	HIRE
NEW HIRE	HIRE
NEW TRAINEE AWARD	HIRE

5. Enter the **Effective Date** in the **EFFECTIVE DATE** field.
Note: This date cannot be changed once you have saved the document. Use the calendar LOV or type in the desired date using the **DD-MMM-YY** Format.

Calendar

March 2011

S	M	T	W	T	F	S
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

01-MAR-2011

OK Cancel

6. Click in the **ATTACHMENTS** checkbox; a check mark now appears which indicates attachments **will be** accompanying the New Hire document. For a list of **Attachments** to accompany a **New Hire** document, [click here](#).

ACT Main Form

Document Reason: NEW HIRE

Effective Date: 01-MAR-2011

Requestor Name: HALEY

☒ Attachments ☐ Received

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- Click **SAVE** at the bottom of the form. The system will assign a **Document Number** and the **DOCUMENT STATUS** is now **OPEN**.

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.



The screenshot shows the 'ACT Main Form' window. It contains several input fields and checkboxes. On the left, there are three stacked text boxes: 'Document Reason' with the value 'NEW HIRE', 'Effective Date' with the value '01-MAR-2011', and 'Requestor Name' with the value 'HALEY'. Below these are two checkboxes: 'Attachments' (checked) and 'Received' (unchecked). On the right, there are three stacked text boxes: 'Document Number' with the value '538702', 'Document Status' with the value 'OPEN', and 'Workflow Type' with the value 'HIRE'. At the bottom right is a 'Submit Date' text box.

Document Reason	NEW HIRE	Document Number	538702
Effective Date	01-MAR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE NEW HIRE DOCUMENT. You will not be able to locate the new employee by name or social security number until the New Hire document has entered **COMPLETE** status.

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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**, **DIRECTORY**, and **LICENSE**; when necessary, the **TERMINATION** form. The two buttons contain Address and Schools and Colleges data.

Entering Person Data Information

Click on the **PERSON DATA** tab at the bottom of the ACT Main Form.

The screenshot displays the 'ACT Main Form' interface. At the top, there are fields for 'Document Reason' (NEW HIRE), 'Effective Date' (01-MAR-2011), 'Requestor Name' (HALEY), 'Document Number' (538702), 'Document Status' (OPEN), 'Workflow Type' (HIRE), and 'Submit Date'. Below these are checkboxes for 'Attachments' and 'Received'. The 'Person Data' section contains fields for 'Name', 'Identification Number', 'SSN', 'Service Date', 'Date of Birth', 'Gender', 'Ethnic Origin', 'Total Active Assignments', 'Total Projected Annual Salary', and 'Prior UAB Service'. The 'Assignment Data' section includes fields for 'Assignment Number', 'Assignment Category', 'Job', 'FTE', 'Projected Assignment Salary', 'Assignment Status', 'Organization', 'Position', 'Primary', and 'Payroll'. At the bottom, there are tabs for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. The 'Person' tab is selected. Below the tabs is a 'Comments' text area. At the very bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

Document Reason	NEW HIRE	Document Number	538702
Effective Date	01-MAR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name		Gender	
Identification Number		Ethnic Origin	
SSN		Total Active Assignments	
Service Date		Total Projected Annual Salary	
Date of Birth		<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	
Assignment Category		Organization	
Job		Position	
FTE		Primary	
Projected Assignment Salary		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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Entering Personal Information

1. The **PERSON DATA FORM** opens. Required fields are yellow and must be completed before saving the form.

Person Data (Create New Document)

Full Name		Document Reason	NEW HIRE
Identification Number		Document Number	538702
Assignment Number		Document Status	OPEN
		Effective Date	01-MAR-2011

Latest Hire Date	01-MAR-2011	Service Date	01-MAR-2011
Person Type	Employee	Email Address	

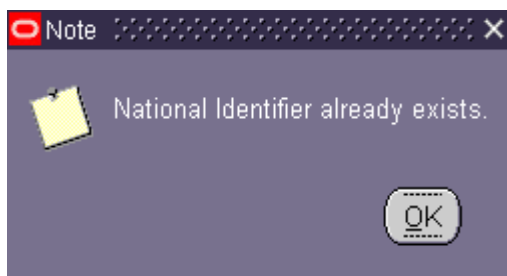
Personal | Employment | Phonebook | License | Termination | Schools and Colleges

	Current	Proposed
SSN		
Last Name		
First Name		
Middle Names		
Suffix		
Title		
Date Of Birth		
Gender		

Comments

Address Return to Previous Form Save

2. Enter the **employee's Social Security number/ITIN/Temporary Identification number** in the **SSN** field; **do not enter dashes**. Press **TAB** or click in the next field.



Note: If you receive the following **NOTE** after entering the employee's social security number, the employee's personal data already exists in the Administrative Systems. A **Rehire** document will have to be completed on this employee. For instructions on completing a **Rehire** Document [click here](#).

3. Enter the **employee's last name** exactly as it should appear in the **LAST NAME** field. **Remember this is the employee's official UAB electronic document. The FIRST letters of all names are to be capitalized; REMAINING letters are to be lower case.** Press **TAB** or click in the next field.

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4. Enter the **employee's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
5. Enter the **employee's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
6. Enter the **employee's suffix**, in the **SUFFIX** field if applicable. **Example: Sr., Jr., III, etc.** Press **TAB** or click in the next field.
7. Click once in the **TITLE** (Mr. Mrs. Miss) field. Choose **appropriate title** from LOV or type it directly into the field. **Once you have selected the title, the GENDER field will automatically populate based on title choice.**
8. Click once in the **DATE OF BIRTH** Field. Enter the **employee's birth date** using the **DD-MMM-YY** format.
9. Click the **SAVE** button at the bottom of the form.

	Current	Proposed
SSN		222-11-3333
Last Name		Example
First Name		One
Middle Names		
Suffix		
Title		Mr.
Date Of Birth		15-APR-1978
Gender		MALE

Comments

Address Return to Previous Form Save

10. Once you click the **SAVE** button, the screen will advance to the **EMPLOYMENT** Tab.

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Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT system. It features two columns: 'Current' and 'Proposed'. The 'Current' column has input fields for 'Ethnic Origin', 'Veteran Status 100', 'Veteran Status 100A', 'I-9 Status', 'Visa Type', and 'Work Visa Expiration Date'. The 'Proposed' column has corresponding yellow-highlighted input fields. A button labeled 'More info on Veteran Status' is located to the right of the 'Proposed' fields. At the bottom, there is a 'Comments' section with a text area and a scroll bar.

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

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

This screenshot shows the 'Ethnic Origin' LOV. It has a search bar at the top and a list of options below. The options are: American Indian or Alaskan Native (highlighted in blue), Asian, Black or African American, Hispanic or Latino, regardless of race, Native Hawaiian or Other Pacific Islander, Two or More Races, and White. At the bottom, there are 'Find', 'OK', and 'Cancel' buttons.

2. Click in the **VETERANS STATUS 100A** field, **Not a Veteran** will automatically default; however, if the employee has presented a completed **"Invitation to Self Identify Form"** click the **LOV** for veteran status options and select the correct veteran status. To see reporting requirements and veteran status definitions click on the **"More info on Veteran Status"** button. Once the appropriate veteran status is selected, click **OK**.

This screenshot shows the 'Veteran Status' LOV. It has a search bar at the top and a list of options below. The options are: Armed Forces Service Medal (AFSM) Veteran, Disabled Vet, Other Protected, AFSM, Recently Separated, Disabled Veteran, Disabled, AFSM Veteran, Disabled, Other Protected Veteran, Disabled, Other Protected, AFSM Veteran, Disabled, Recently Separated Veteran, Disabled, Recently Separated, AFSM Veteran, Not a Veteran (highlighted in blue), Other Protected Veteran, Other Protected Veteran, AFSM, Recently Separated, Other Protected, AFSM Veteran, and Other Protected, Recently Separated Veteran. At the bottom, there are 'Find', 'OK', and 'Cancel' buttons.

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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.

Copy & paste link into URL:

http://www.hrm.uab.edu/main/records/form_I9.html

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**.

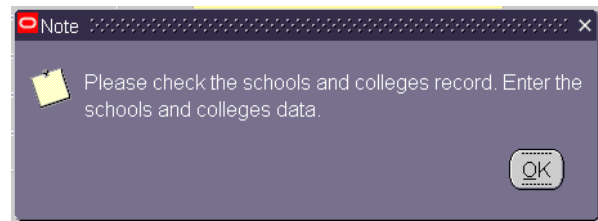
For more information on Visa Types, go to International Scholars Services (ISS) webpage. Copy and paste link into URL:

<http://main.uab.edu/Sites/students/53998/>

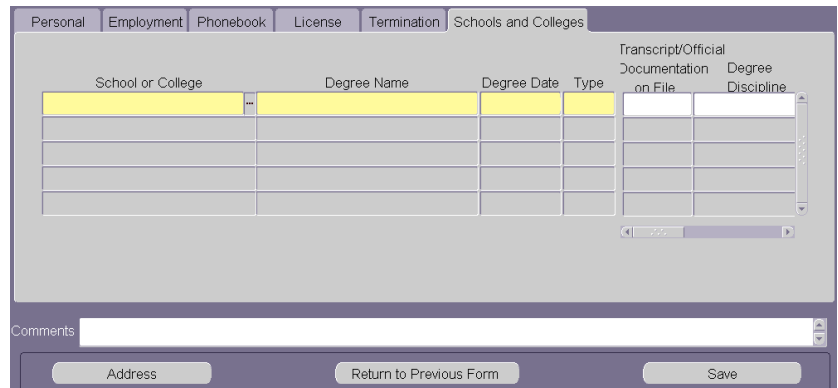
5. When required, enter future **Work Visa Expiration Date**. Date can be typed directly into the field using the dd/mmm/yyyy and must be a **future** date.

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- Click on the **SAVE** button. The following note will display. Click on OK and proceed to enter the schools and college data.



- Click on the **SCHOOLS AND COLLEGE** tab.



School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline

Comments

Address Return to Previous Form Save

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Entering Schools and Colleges Information

1. Type in the ***name of the school or college*** or select it from the LOV.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham					

Comments:

Address

Note: The School and College LOV include listings of Institutions within the United States however; if the institution does not appear in the LOV listing, select **Institution Not Available in Listing**. For Institutions outside of the United States select **Foreign University**.

2. Click in the **DEGREE NAME** field. Using the LOV, select the appropriate degree. **Enter the highest level of degree the employee has earned, (Examples: High School Graduate, GED, Post High School Coursework, Bachelors, Masters, or PhD etc.** Click OK.

Degree Name	Description
400 Bachelor's Degree Non Specific	Bach
401 Bachelor's Level Non US Degree Equiv	Bach
402 Bachelor of Arts	Bach
410 Bachelor of Business	Bach
415 Bachelor of Computer Science	Bach
420 Bachelor of Education	Bach
430 Bachelor of Engineering	Bach
440 Bachelor of Health (Allied)	Bach
448 Bachelor of Nursing	Bach
449 Bachelor of Pharmacy	Bach
450 Bachelor of Humanities	Bach
460 Bachelor of Science or Mathematics	Bach

Find

3. Click in the **DEGREE DATE** field. Enter the ***degree date*** using the ***dd-mmm-yy*** format or use the Calendar LOV.

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School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	448 Bachelor of Nursing				

4. Click in the **TYPE** field. Select **Other Degree (OD)** or **Highest Degree (HD)** from the LOV. A person can only have one highest degree. All others must be marked as Other Degree (OD).
5. Repeat the above steps, as necessary, until all degrees are entered. Use the down arrow on the keyboard to create multiple records if necessary.

Note: Faculty/Instructor Information fields must be completed on all Faculty and Credential Staff Course Instructors. The Transcript/Official Documentation on File field must be marked YES, indicating an official transcript is on file in the appropriate Dean's office, before the ACT document will be approved by the Provost office.

6. For Faculty and Credential Staff Course Instructors only. Type **Yes** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.
7. Type the **appropriate Degree Discipline** as indicated on the employee's official transcript or completed Faculty Data Form, or use the LOV, to select the appropriate degree discipline.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	448 Bachelor of Nursing	25-MAY-2004	HD		51.16 - Nursing.

8. Click on Save.

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Entering Phonebook Information

The screenshot shows the 'Phonebook' tab selected in the ACT system. The main section is titled 'Data used for the UAB Electronic Directory' and is divided into 'Current' and 'Proposed' columns. The 'Current' column has four input fields: 'Individual Online List', 'Online Job Title', 'Online Display Name', and 'Faculty and Staff List'. The 'Proposed' column has a dropdown menu for 'Individual Online List' with 'Yes' selected, and three input fields for 'Online Job Title', 'Online Display Name', and 'Faculty and Staff List'. To the right of these fields is a checkbox labeled 'Assignment Job Title (Last Name, First Name)' with a note '*** Please do not add suffix'. Below the main section is a 'Comments' text area. At the bottom are three buttons: 'Address', 'Return to Previous Form', and 'Save'.

1. **INDIVIDUAL ONLINE LIST** field defaults to **Yes**. All employees will be listed in the UAB Electronic phonebook.
2. Click in the **ONLINE JOB TITLE** field **only** if the employee's title to be listed in either the UAB paper phonebook or electronic phonebook is **different** than the assigned job title. Enter the ***desired job title***.
3. Click in the **ONLINE DISPLAY NAME** field **only** if the employee's name is to be listed in either the UAB paper phonebook or electronic phonebook **differently** than what was entered on the **PERSONAL** Tab. **The proper format for this field is: last name, first name. No space between the comma and first name.**
4. Click the **LOV** in the **FACULTY AND STAFF LIST** field. Choosing **Yes** will include the employee in the UAB paper phonebook listing; choosing **No** will exclude the employee. Click **OK**. **

*** After December 2009, the white pages section of the UAB "paper" Phonebook will be made available online as a pdf. Faculty and Staff employees with "Yes" in the Faculty and Staff List field will be included in the online pdf.*

5. Click the **SAVE** button at the bottom of form.

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Entering License, Certification, Membership Information

1. Click on the **LICENSE** tab if applicable. **Note: Information entered on this tab is entered only when the employee holds a professional license, membership or certification.**

The screenshot shows the 'License/Certificate/Membership Information' form within the ACT system. At the top, there are tabs for 'Personal', 'Employment', 'Phonebook', 'License', 'Termination', and 'Schools and Colleges'. The 'License' tab is selected. The form is divided into two columns: 'Current' and 'Proposed'. Each column has four input fields: 'Type', 'Title', 'Number', and 'Expiration Date'. Below these fields, a note states: 'Use down arrow to create multiple records.' At the bottom of the form, there is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

2. Using the LOV in the **TYPE** field; choose the **appropriate License type**. **Note: If you choose License, the Title, Number, and Expiration Date fields become required fields.**

The screenshot shows a 'License Type' List of Values (LOV) window. It has a search bar at the top labeled 'Name'. Below the search bar, there is a list of options: 'Certification', 'License', 'Membership', and 'Professional Competency Certification'. The 'License' option is currently selected and highlighted in blue.

3. If you select **License**, a form listing of **LICENSE TITLES** appears.

The screenshot shows a 'License Title' List of Values (LOV) window. It has a search bar at the top labeled 'Find %'. Below the search bar, there is a list of license titles: 'Architect', 'Cert. Nurse Anesthetist', 'Cert. Public Accountant', 'Dentist', 'Dietician', 'Engineer, Professional', 'Lawyer', 'Licensed Practical Nurse', 'Medical Doctor, LIC/CERT Unknown', 'Medical Doctor, Perm Foreign L/C', 'Medical Doctor, Perm US LIC/CERT', and 'Medical Doctor, Temp Foreign L/C'. The 'Architect' option is currently selected and highlighted in blue. At the bottom of the window, there are three buttons: 'Find', 'OK', and 'Cancel'.

Select the appropriate **License title**,
Click **OK**.

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4. If you select ***Certification, Membership or Professional Competency***, you will need to type ***the appropriate title*** in the **TITLE** field.
5. Type the ***License Number*** in the **NUMBER** field, if applicable.
6. In the **EXPIRATION DATE** field, choose the ***expiration date*** from the Calendar LOV or type the ***date*** in the **EXPIRATION DATE** field using the ***dd-mmm-yy*** format. **Note:** ***This date must be a future date.***
7. Click **SAVE** at the bottom of the form; click on the **ADDRESS** button to begin entering the employee's address information.

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Entering Address and Phone Information

The form is divided into three main sections: Address, Phones, and Comments.

Address Section: Contains fields for Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. It has columns for 'Current' and 'Proposed' information. An 'End Date Current' checkbox is present. A note at the bottom says 'Use the down arrow to create multiple records.'

Phones Section: Contains a 'Delete' checkbox, 'Current' and 'Proposed' columns, and fields for 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. A note at the bottom says 'Use the down arrow to create multiple records.'

Comments Section: Includes an 'International Address' checkbox and a 'Comments' text area.

Note: All employees must have a local (US) address and/or campus address in order to receive correspondence. Employee's can change their home address through the Self Service once their New Hire Document is in COMPLETE status, Campus Address and phone numbers must be changed via a Data Change ACT Document.

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

This screenshot shows the 'Address Types' LOV (List of Values) window. The window has a search bar labeled 'Find %'. Below it is a list of address types: 'Type', 'Campus Primary', 'Campus Secondary', 'Campus Tertiary', 'Home', and 'Recruiting'. The 'Home' option is highlighted in blue. At the bottom of the window are buttons for 'Find', 'OK', and 'Cancel'. An arrow points from the 'Home' option in the LOV to the 'Address Type' field in the background ACT form.

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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.

Current		End Date	Current	Proposed
Address Type			<input type="checkbox"/>	Campus Primary
Building				NP
Room				
Address Line3				NORTH PAVILION UNIVERSITY OF ALABAMA

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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 working to ensure that the employee receives his or her campus mail. Click **SAVE**.
11. Repeat the steps 6 - 10 if a Campus Secondary address is necessary.

The screenshot shows the 'Address' form with two main sections: 'Current' and 'Proposed'. The 'Current' section has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' section has fields for Campus Primary, NP, 5771, NORTH PAVILION UNIVERSITY OF ALABAMA, Birmingham, AL, 35294, and 6950. A note at the bottom says 'Use the down arrow to create multiple records.'

12. To enter both Home and Campus phone numbers, click in the **TYPE** field located in the Phones region of the form.

The screenshot shows the 'Phones' form with a table of phone numbers. The first row has 'Type' (Home), 'Phone Number (xxxxxxxx)' ((205) 666-4444), and 'Date From' (01-OCT-2009). A note at the bottom says 'Use the down arrow to create multiple records.'

13. Type **Home** in the **TYPE** field or choose **Home** from the LOV.
14. Enter the **employee's ten digit home phone number** in the **PHONE NUMBER** field without dashes.
15. Type the **effective start date** in the **DATE FROM** field or use the calendar LOV. **Usually this is the effective date of the document.**
16. Click in **the row under the Home phone listing**. Type in **Campus Primary** or choose **Campus Primary** from the **PHONES TYPE** LOV.
17. Enter the **ten digit campus telephone number**.

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18. 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**.

Phones		Type	Phone Number (xxxxxxxxxx)	Date From
Delete Current	<input type="checkbox"/>	Campus Primary	(205) 934-4564	01-OCT-2009
	<input type="checkbox"/>	Home	(205) 666-4444	01-OCT-2009
	<input type="checkbox"/>			

Use the down arrow to create multiple records.

Note: Repeat these steps to enter additional phone numbers for the employee. Use the down arrow on your keyboard to enter multiple records, if necessary.

19. Click the **SAVE** button; then click return to **RETURN PREVIOUS FORM** button. This will take you back to the **PERSON DATA FORM**.
20. Click **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA FORM** to return to the **ACT MAIN FORM**.
21. Click the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.

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The information on the **ASSIGNMENT** form identifies the employee's employment status, which determines eligibility for employee benefits, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting an employee's worked time to payroll.

Entering Assignment Form Information

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

General Assignment Information

Current

Assignment Category

Status

Expected Return Date

Organization

Location

Position

Job

Grade

Payroll Group

Timecard Dist Number

Timekeeping Method

Timekeeping Organization

Comments

Proposed

Assignment Category

Active Assignment

2. Select the **appropriate assignment category** from the **ASSIGNMENT CATEGORY LOV**. For a listing of UAB Assignment categories [click here](#). (You and UAB Section 2.1) Click **OK**.

Assignment Categories

Find %

Employment Category

01 Regular FT

02 Temporary FT

03 Regular PT

04 Irregular

06 Student

07 Resident

11 Federal/Work Study

Find OK Cancel

Note: When either the **06 Student** or **11 Work Study Student** assignment categories is selected, return to the **Person Data Form** and enter the student's **Blazer ID** in the required **BLAZER ID** field.

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

General Assignment Information		Current	Proposed
Assignment Category			01 Regular FT
Status			Active Assignment
Expected Return Date			
Organization			329800000 Periodontology
Location			Bham Main Campus
Position			
Job			
Grade			
Payroll Group			
Timecard Dist Number			
Timekeeping Method			...
Timekeeping Organization			

- Click in the **POSITION** field, select the **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 - both vacant and filled. By entering the correct position, the **JOB** field and **GRADE** field will be auto populated.

General Assignment Information		Current	Proposed
Assignment Category			01 Regular FT
Status			Active Assignment
Expected Return Date			
Organization			329800000 Periodontology
Location			Bham Main Campus
Position			329800000.86301.031001
Job			HD030N0.Dental Hygienist
Grade			W.G12

- Select the **appropriate payroll group** from the **PAYROLL GROUP** LOV. Click **OK**

Note: Faculty 12 = Faculty who work 12 months of the year. Faculty 9 = Faculty who work 9 months of the year. Staff 12 = Staff who work 12 months of the year. Staff 9 = Staff who work 9 months of the year.

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6. If this is a biweekly assignment, enter the employee's timekeeping information.
 - 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.
7. If this is a monthly assignment, leave the above three fields blank.
8. Click the **SAVE** button at the bottom of the form.

The screenshot shows a web form titled "General Assignment Information". It is divided into two main sections: "Current" and "Proposed".

Current	Proposed
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	329800000 Periodontology
Location	Bham Main Campus
Position	329800000.86301.031001
Job	HD030N0.Dental Hygienist
Grade	W.G12
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	

Below the table is a "Comments" field with a text area and a scroll bar.

At the bottom of the form are two buttons: "Return to Previous Form" and "Save".

9. Click the **RETURN TO PREVIOUS FORM** button located at the bottom of the form and return to the **ACT MAIN FORM**.
10. Click on the **SALARY** button at the bottom of the **ACT MAIN FORM**.

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The **SALARY** form should be completed before entering the **Labor Sources** data.

Entering Salary Form Information

1. Click the **SALARY** button at the bottom of the **ASSIGNMENT FORM** or the **ACT MAIN FORM**. This will open the **SALARY** Form.

Note: The yellow required field or fields in the **PROPOSED** section must be completed first. The yellow required fields will be different according to your organization. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.

Component Reasons			
	Reason	Change Value	Change %
Use the down arrow to create multiple records.			

	Current	Proposed
Projected Assignment Salary		
Actual Assignment Rate of Pay		
FTE		
Hosp Calc Code		
Premium Plan		
Salary Basis		HOURLY
Payroll		Biweekly
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments		

Return to Previous Form Save

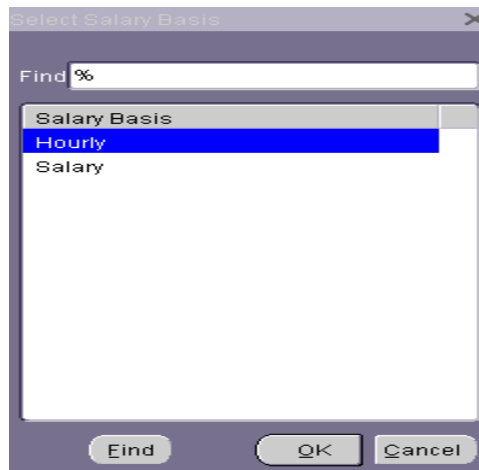
- A. The **HOSP CALC CODE** field is a required field for **Hospital Employees only**. Click on the Hosp Calc Code LOV and select **B** from the listing.

	Current	Proposed
Projected Assignment Salary		
Actual Assignment Rate of Pay		
FTE		
Hosp Calc Code		B
Premium Plan		NA
Salary Basis		
Payroll		
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments		

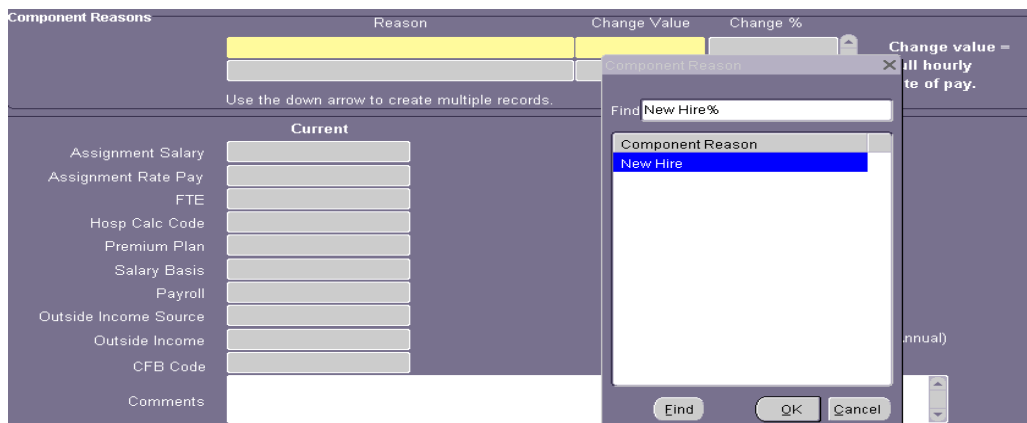
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- B. **SALARY BASIS** field is a required field, using the LOV select the appropriate **Salary Basis** Type; click **OK**.



2. In the Component Reasons section, click in the **REASON** Field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields. Using the LOV in the Reason field select **New Hire**, click **OK**.



3. Click in the **CHANGE VALUE** field; enter either the **hourly rate** (for a bi-weekly paid employee) or the **monthly rate** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered.
4. Enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is **strongly recommended** that you enter this information for Records. For explanation of FTE values [click here](#).
5. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK**.

Note: There are only two outside income sources -- VA and Eye Foundation.

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6. Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
7. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

Component Reasons			
Reason	Change Value	Change %	
New Hire	15.00		Change value = Full hourly rate of pay.
Use the down arrow to create multiple records.			

	Current	Proposed	
Projected Assignment Salary		31,200.00	
Actual Assignment Rate of Pay		15.00	
FTE		1.00	
Hosp Calc Code			
Premium Plan		NA	
Salary Basis		HOURLY	
Payroll		Biweekly	
Outside Income Source			
Outside Income			(Annual)
CFB Code		GROUP C	
Comments			

Return to Previous Form
Save

8. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ACT MAIN FORM**.
9. Click the **LABOR SOURCE** button at the bottom of the **ACT MAIN FORM**.

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The **LABOR SOURCES** indicate what account strings the employee's salary and associated fringe benefits will be charged to. Because the GL and GA account structures are different, there are differences in entering the account string data.

Entering Labor Sources Form Information

Entering General Ledger (GL) Information

Projected Assignment Salary: 31,200.00 Element Name: [Dropdown]

Costing

Assignment Element

Current LD	Stop	Effective Date		GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>			[Dropdown]					
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: [Text Area]

Total LD %: .00

Return to Previous Form Save

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

UAB_AKF

ALIAS [Text Field] [Dropdown]

OK Cancel Clear Help

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.

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UAB_AKF

ACCOUNT **2100213** PERIODONTOLOGY

SUBACCOUNT **000** DEFAULT SUBACCOUNT

BALANCING **123200000** SCH DEN GEN OPER FD

ORGANIZATION **329800000** PERIODONTOLOGY

FUTURE **0000** DEFAULT

OBJECT ...

Buttons: OK, Cancel, Combinations, Clear, Help

- Click in the **OBJECT** field and enter **Zero (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.
- Type in the **percent of the employee's funding** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Note: *an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.*

- Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field has to total **100%** before you can save the document.

Projected Assignment Salary **31,200.00** Element Name

Costing

Assignment | Element

Current LD	Stop	Effective Date From Date	To Date	GL Code	Project	Task	Award	Exp Ot	%
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2009		2100213.000.123200000.329800000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments:

Total LD % 100.00

Buttons: Return to Previous Form, Save

- Once the **TOTAL LD%** field equals 100%, click **SAVE**.

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Entering Grant (GA) Funding Sources

1. Click one time in the **PROJECT** field of the next available row.

The screenshot shows the 'Costing' section of the ACT form. At the top, 'Assignment Salary' is 43,729.92 and 'Element Name' is a dropdown. Below is a table with columns: Current, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The first row has '12-SEP-2005' in From Date, '7110340.000.130000000.702500000' in GL Code, and '50.00' in the % column. The 'Project' field is empty and highlighted by an arrow.

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.

7. Type in the **percent of the employee's effort** to be charged to the project number in the **%** field.
8. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.

The screenshot shows the 'Costing' section with two rows in the table. The first row is the same as in the previous screenshot. The second row has '12-SEP-2005' in From Date, '30-SEP-2005' in To Date, '225820' in Project, '01.01' in Task, '1525820' in Award, '10' in Exp Or, and '50.00' in the % column. The 'Total LD %' at the bottom right is circled in red and shows '100.00'.

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

9. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM**.

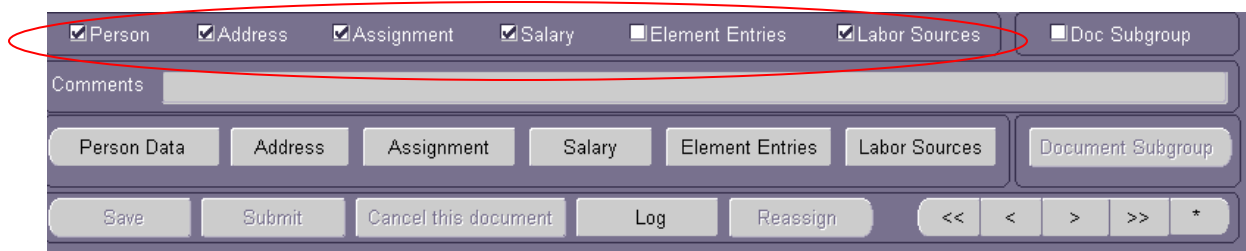
Appoint, Change and Terminate (ACT) Documentation

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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**, checkmarks have been inserted in the checkbox next to **PERSON, ADDRESS, ASSIGNMENT, SALARY** and **LABOR SOURCES**.

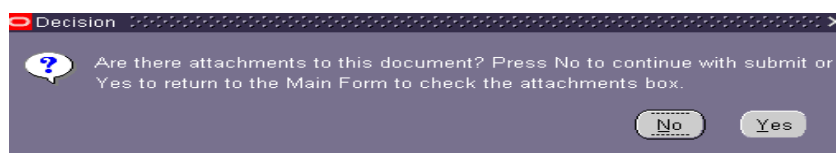


Note: A check will be inserted automatically when **REQUIRED FIELDS** on all screens and tabs have been completed. All check boxes must be checked (excluding Element Entries, except on Status 99 New Hire Document) before submitting the document.

2. On the **ACT MAIN FORM**, verify the Attachments check box has a checkmark; assemble all attachments to be submitted with New Hire document.



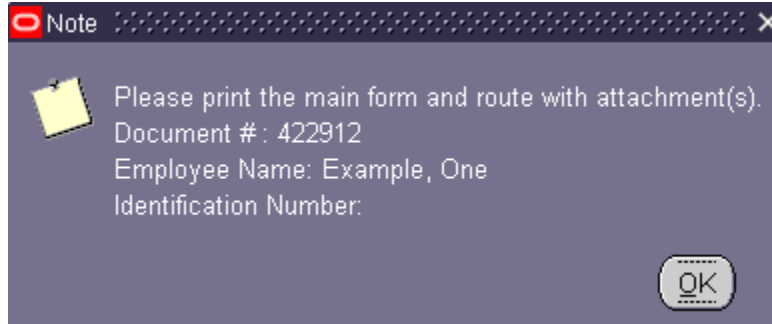
3. Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**
4. Click the **SUBMIT** button.
5. If the document was submitted without a checkmark in the **ATTACHMENTS** box on the **ACT MAIN FORM**, the following **DECISION** window displays.



Appoint, Change and Terminate (ACT) Documentation

New Hire: Submitting a New Hire Document

- Click **YES** to return to the **ACT MAIN FORM**; click in the **ATTACHMENTS** checkbox and resubmit the document.
- The following Note displays.



- Click **OK**. Print the **ACT MAIN FORM**; attach a printed copy of the **ACT MAIN FORM** to attachments being sent Central HR.
- 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).



Document Reason	NEW HIRE	Document Number	422912
Effective Date	01-OCT-2009	Document Status	READY
Requestor Name	HALEY	Workflow Type	HIRE
Submit Date	16-OCT-2009 14:15:49		

☒ Attachments ☐ Received

****** 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 **NEW HIRE** 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. When the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.
- The requestor of the **NEW HIRE** document will receive email notification when an employee's **NEW HIRE** document has entered a **COMPLETE** status.

The employee can now create a Blazer ID. For information on setting up a **Blazer ID** go to BlazerID Central webpage. Copy and paste link into URL:

<https://idm.blazernet.uab.edu/bid/reg>

[RETURN TO TOP](#)