

# Faculty ACT Documents & Personnel Transactions

## Table of Contents

<i>New Hires &amp; Rehires - Full time Regular (01) and Part-time Regular (03)</i> .....	2
<i>New Hires &amp; Rehires (for Full-time Temporary – 02 Status)</i> .....	3
<i>New Hires &amp; Rehires; (04) Non-Regular Faculty</i> .....	4
<i>New Hires &amp; Rehires (Credentialed Course Instructors)</i> .....	4
<i>Promotion Same Department/To Non-Recruited Position</i> .....	6
<i>Promotion Same Department (Out of Cycle)</i> .....	6
<i>Change of Assignment Category</i> .....	7
<i>Change of Assignment Category (Non-Recruited Position)</i> .....	7
<i>Transfer with Promotion (to Recruited Position)</i> .....	7
<i>Transfer with Promotion (to Non- Recruited Position)</i> .....	8
<i>Transfer Lateral/Different Department (To Recruited Position)</i> .....	9
<i>Transfer Lateral/Same Department (To Recruited Position)</i> .....	9
<i>Transfer Lateral/Same or Different Department (To Non-Recruited Position)</i> .....	10
<i>Create or Rehire Volunteer</i> .....	11
<i>End a Volunteer</i> .....	11
<i>Salary Schedule Adjustment</i> .....	11
<i>Merit or Budget Increase</i> .....	12
<i>Rehire Faculty Retiree</i> .....	12
<i>Terminations (Faculty)</i> .....	12
<i>Additional Assignments</i> .....	13
<i>Reclassification</i> .....	13
<i>End Assignment</i> .....	13
<i>Data Change</i> .....	14
<i>ACTIONS NOT REQUIRING AN ACT DOCUMENT</i> .....	14

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## Faculty ACT Documents & Personnel Transactions

### New Hires & Rehires - Full time Regular (01) and Part-time Regular (03)

To complete the New Hire and Rehire faculty hiring and appointment process, the following is required:

- Faculty Data Form, submitted at <http://www.uab.edu/uabforms>

#### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Appointment letter (**must be signed by faculty member**)
  - Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
  - HSOM units must use the faculty letter templates provided by your dean's office.
- Candidate application from UAB PeopleAdmin (Upload to OnBase only)
- Position Requisition (Applicant View) from UAB PeopleAdmin (Upload to OnBase only)
- **Appointment Action Summary Form** (if appointment is at rank of Professor with or without tenure, or Associate Professor with tenure.)  
<https://www.uab.edu/faculty/images/hiring/appointment-action-summary-form.pdf>
- Candidate Curriculum CV (Upload to OnBase only)

#### Other Requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.
- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

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## Faculty ACT Documents & Personnel Transactions

### New Hires & Rehires (for Full-time Temporary – 02 Status)

*To complete the New Hire and Rehire process for full-temporary faculty, the following is required:*

NOTE: Recruitment is not required for this appointment. However, if a 02-Full-time appointment was recruited, please use the same process and supporting documentation required for full-time regular faculty hires.

Full-time Temporary Faculty appointments are for one year only. To extend the appointment beyond the initial one-year period, approval must be received from the Office of the Provost.

- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>

### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
  - Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
  - HSOM units must use the faculty letter templates provided by your dean's office.
  - Current Curriculum Vitae (Upload to OnBase only)

### Other requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.

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## Faculty ACT Documents & Personnel Transactions

- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

### New Hires & Rehires; (04) Non-Regular Faculty

*To complete the 04- Non-Regular Faculty hiring and appointment process, please note the following.*

Faculty Data Form submitted at, <http://www.uab.edu/uabforms>

#### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Hire letter (**must be signed by faculty member**)
- Current Curriculum Vitae (Upload to OnBase Only)
- If the appointment involves an Emeritus Faculty member, upload the President's Congratulatory Letter in both the FDF and OnBase.

#### Other requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.
- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

### New Hires & Rehires (Credentialed Course Instructors)

- Letter of Offer/Hire Letter (**must be signed by faculty member**)  
<https://www.uab.edu/faculty/hiring/appointment-letter-templates>
- Current Curriculum Vitae or Resume

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## Faculty ACT Documents & Personnel Transactions

### Other requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.

### Promotion Same Department/To Recruited Position

- Faculty Data Form, submitted at <http://www.uab.edu/uabforms>

### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Appointment letter (**must be signed by faculty member**)
  - Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
  - HSOM units must use the faculty letter templates provided by your dean's office.
- Candidate application from UAB PeopleAdmin (Upload to OnBase only)
- Position Requisition (Applicant View) from UAB PeopleAdmin (Upload to OnBase only)
- **Appointment Action Summary Form** (if appointment is at rank of Professor with or without tenure, or Associate Professor with tenure.)  
<https://www.uab.edu/faculty/images/hiring/appointment-action-summary-form.pdf>
- Candidate Curriculum Vitae (Upload to OnBase only)

### Other Requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.

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## Faculty ACT Documents & Personnel Transactions

- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

### Promotion Same Department/To Non-Recruited Position

*This transaction most likely occurs when a 04 (non-regular) or 02-full time temporary faculty is promoted to a higher rank; or when a 04 staff (i.e. credentialed course instructor) is promoted to 04 or 02 faculty, any rank.*

- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>
- Letter of Offer/Hire Letter (**must be signed by faculty member**)
- Current Curriculum Vitae (Upload to OnBase Only)
- Original transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required to follow SACSCOC guidelines.

\*If 04 staff promotes or moves to a 04 or 02 faculty position, complete hire process in UAB PeopleAdmin.

### Promotion Same Department (Out of Cycle)

- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
- Current Curriculum Vitae
- Promotion & Tenure Action Summary Form  
<https://www.uab.edu/faculty/images/promotion-tenure/promotion-tenure-action-summary-form.pdf>
- Faculty Data Form to change rank <http://www.uab.edu/uabforms>

**NOTE:** Out-of-Cycle Promotions are only granted in extenuating circumstances, and the promotion request must be approved by the Faculty Affairs Committee (Promotion & Tenure Committee) Dean, Provost, and President. Approval

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## Faculty ACT Documents & Personnel Transactions

decisions must be confirmed before being communicated to the affected faculty member.

### Change of Assignment Category

This scenario most often applies to changes from 01 to 03; and 03 to 01 faculty positions. The following is required

- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>
- Letter of Offer/Hire Letter (**must be signed by faculty member**)
- Upload required supporting documentation to Oracle/OnBase and the FDF.

Change of Assignment Category is a move from 01 to 03 or 03 to 01 with no recruitment, just a change of hours

If there was recruitment, then this would be a transfer document to move them to the recruited position

### Change of Assignment Category (Non-Recruited Position)

This scenario is most often applicable for changes of 04 faculty to 02 faculty; and 02 faculty appointments to 04 faculty appointments.

- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>
- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
- Current Curriculum Vitae (Upload to OnBase Only)
- Original transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required to comply with SACSCOC guidelines.

### Transfer with Promotion (to Recruited Position)

Possible scenario: NTE to TE position (non-tenure track to tenure track)

- Faculty Data Form, submitted at <http://www.uab.edu/uabforms>

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## Faculty ACT Documents & Personnel Transactions

### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
  - Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
  - HSOM units must use the faculty letter templates provided by your dean's office.
- Current Curriculum Vitae (Upload to OnBase only)
- Candidate Application from UAB PeopleAdmin (Upload to OnBase only)
- Requisition from UAB PeopleAdmin – Candidate View (Upload to OnBase only).

#### Other requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.
- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

### Transfer with Promotion (to Non- Recruited Position)

*This transaction most likely occurs when a 04 (non-regular) or 02-full time temporary faculty is promoted to a higher rank; or when a 04 staff (i.e. credentialed course instructor) is promoted to 04 or 02 faculty any rank.*

The requirements are:

- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>
- Letter of Offer/Hire Letter (**must be signed by faculty member**)
- Current Curriculum Vitae (Upload to OnBase Only)

Documents must be uploaded as separate PDFs.

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## Faculty ACT Documents & Personnel Transactions

### Transfer Lateral/Different Department (To Recruited Position)

Faculty member moves from one school/college to another, or from one department within a school to another department within the same school/college. Ex: From Optometry to Ophthalmology.

Faculty Data Form, submitted at <http://www.uab.edu/uabforms>

### OnBase and Faculty Data Form (FDF) Requirements

- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
  - Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
  - HSOM units must use the faculty letter templates provided by your dean's office.
- Current Curriculum Vitae (Upload to OnBase Only)

#### Other requirements:

- **Confirmation that the Hiring Proposal is fully approved and, it's at Offer Accepted, Start Onboarding, or Faculty Affairs Review. Note your confirmation in the ACT Document Comments Section**
- **Electronic I-9 /E-Verify Completed.** *Contact your Dean's Office for specific instructions and process for Faculty I-9/E-Verify for your respective unit.*
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required – to follow SACSCOC guidelines.
- Each document attached to the **ACT document**/OnBase must be saved as a separate PDF document.

### Transfer Lateral/Same Department (To Recruited Position)

*Sample scenarios: a faculty member is hired as Division Director; 20 Trainee to 01 full-time faculty.*

Requirements are:

- Faculty Data Form, submitted at <http://www.uab.edu/uabforms>

### On Base and Faculty Data Form (FDF) Requirements

- Letter of Offer/Appointment letter (**must be signed by faculty member**)

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## Faculty ACT Documents & Personnel Transactions

- Faculty Offer Letter Templates are located at <https://www.uab.edu/faculty/hiring/appointment-letter-templates>
- HSOM units must use the faculty letter templates provided by your dean's office.
- Candidate application from UAB PeopleAdmin (Upload to OnBase only)
- Position Requisition (Applicant View) from UAB PeopleAdmin (Upload to OnBase only).
- Appointment Action Summary Form (if appointment is at rank of Professor with or without tenure, or Associate Professor with tenure).  
<https://www.uab.edu/faculty/images/hiring/appointment-action-summary-form.pdf>

**NOTE:** All other supporting documents required to complete the faculty appointment have been submitted during the HIRING PROPOSAL APPROVAL PROCESS in UAB PeopleAdmin. These documents include: 1) EEO Report, 2) Candidate Curriculum Vitae, 3) Recruitment Advertisements—the actual tear sheets or ad copies, 4) Appointment Action Summary Form (If appointment is at Rank of Professor with or without tenure or Associate Professor with tenure), and 5) Faculty Requisition.

### Transfer Lateral/Same or Different Department (To Non-Recruited Position)

*A likely scenario is a **Change of Locus** or a **Reorg** or restructuring which transfers the primary faculty appointment from one unit/school/college to another [Transfer Lateral/Different Department].*

*Other examples include full-temporary (02) to non-regular (04); full-time regular (01) to non-regular (04); and part-time regular (03) to non-regular (04).*

*Requirements are:*

- Approved Change of Locus Request
- Letter of Offer/Letter of Understanding (**must be signed by faculty member**)
- Current Curriculum Vitae
- [Faculty Data Form submitted here.](#)
- Upload documents as separate PDF documents

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## Faculty ACT Documents & Personnel Transactions

### Create or Rehire Volunteer

To create a faculty volunteer appointment, the following is required:

- Letter of Offer/Hire Letter (**must be signed by faculty member**)
  - **Templates are found [here](#).**
- Current Curriculum Vitae (Upload to OnBase Only).
- Faculty Data Form submitted at, <http://www.uab.edu/uabforms>
- **Original** transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office files is required to comply with SACSCOC guidelines.

### End a Volunteer

To end a faculty volunteer appointment, the following is required:

- Either a Letter Understanding to faculty member; or a Resignation Letter
- Faculty Data Form [can be accessed here](#).
- Attach Letter of Understanding to the FDF and ACT Document/OnBase
- Upload required supporting documents as separate FDFs; in both OnBase and the FDF.

### Salary Schedule Adjustment

*Salary Schedule Adjustments are used to process 1) changes in salary due to the addition or deletion of administrative appointments—if there is no change in job title 2) changes in teaching and clinical responsibilities for faculty affiliated with UAHSF and VA Medical Center; and 3) Salary reduction.*

- Letter of Understanding
- TRS Letter when % change is greater than or equal to 15% (or if employee is within retirement or vesture date)
- Any **Faculty Salary Reduction** must be approved by the provost at least one-year before the reduction takes effect. Consult your dean's office for additional guidance.

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## Faculty ACT Documents & Personnel Transactions

- Submit to Faculty Affairs (Provost) for approval before submitting an ACT Document.
- Faculty Data Form can be accessed [here](#); **when the salary adjustment includes adding or removing an administrative appointment that pays an administrative stipend.**

### Merit or Budget Increase

- Memorandum or letter to faculty member to confirm/explain increase to include amount and effective date.

### Rehire Faculty Retiree

Faculty Retirees may be rehired as non-regular (04) or as Volunteer Faculty (60).

#### Requirements are:

- Letter of Understanding/Offer Letter (signed by the faculty member)
- **Approved Request to Rehire Faculty Retiree** ([Sample Request to Rehire Faculty Retiree](#)). Request must be approved by the Office of the Provost.
- Faculty Data Form, submitted [here](#).
- Curriculum Vitae (Upload to OnBase Only)
- Electronic I-9/E-Verify Completed. Contact your Dean's Office *for specific instructions and the process for Faculty I-9/E-Verify for your respective unit*. I-9 NOT REQUIRED FOR VOLUNTEERS.
- Upload required supporting documents as separate PDF documents.

### Terminations (Faculty)

To terminate a faculty appointment-all employment categories-except (60) volunteer, the following is required:

- Resignation Letter, Non-Reappointment Letter, Severance Letter, or Termination Letter
- **Current Leave/Accrual Balances**. These must be certified by your department's Time & Attendance (formerly eLAS) representative before ACT document is approved.
- Faculty Data Form submitted [here](#).

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## Faculty ACT Documents & Personnel Transactions

### Additional Assignments

*Used primarily for staff who assume faculty roles on an irregular basis (either as adjunct faculty or credentialed course instructors-CCI).*

*The requirements are:*

- Letter of Offer/Hire Letter (**must be signed by faculty member or CCI**)
  - Templates are found [here](#).
- Transcript/Degree Verification - Must be on file in the Dean's Office or departmental files—to follow SACSCOC guidelines.
- Faculty Data Form ([form link](#)). (ONLY FOR FACULTY APPOINTMENTS)
- Curriculum Vitae or Resume

### Reclassification

*This document type is used for beginning or ending an administrative appointment when the job title changes; when a faculty member will maintain the same job number; with a different job title within the same department. **Example: Department Chair appointments. Professor rank/title in Oracle is reclassified to Professor/Chair.***

**NOTE:** Please contact Budget Administration to Reclassify the Position Number before submitting an ACT Document to avoid processing delays.

Requirements are:

- Curriculum Vitae (Upload to OnBase Only)
- Letter of Understanding (signed by faculty member)
- Faculty Data Form submitted [here](#).
- Upload required supporting documents as separate PDF documents.

### End Assignment

- Letter of Understanding, or memo
- Faculty Data Form submitted [here](#).

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## Faculty ACT Documents & Personnel Transactions

Example: This ACT Document Type is used when a faculty appointment is ending for a staff employee. This represents their additional assignment.

### Data Change

*Data change ACT documents are processed for a number of reasons, including, but not limited to 1) Extending the End Date for a Full-time Temporary or Irregular Faculty Appointment; 2) Change of Education Information, and 3) VISA Update.*

- **To extend an (02) Full-time temporary faculty appointment**, a memorandum should be addressed to Faculty Affairs—requesting approval to extend the appointment; then,
- For (02) Full-time temporary faculty—a letter/memorandum must be given to the faculty member as confirmation of a change in their appointment status (i.e. extension of end date),
- Copy of both the “**Extension Approval Memorandum**” and “faculty letter/memorandum” must be sent along with the Data Change ACT document.
- Upload documents in Oracle/OnBase as separate PDFs.

### ACTIONS NOT REQUIRING AN ACT DOCUMENT

#### Create Center Appointments (Same or Different School)

- Letter of Understanding. Please use the [Center Appointment Offer Letter Template](#) provided here.
- Faculty Data Form submitted [here](#).

#### Create Secondary Appointments (Same or Different School)

- Letter of Understanding. Please use the [Secondary Appointment Letter Template](#) provided here.
- Faculty Data Form submitted [here](#).
- ACT Document is required if salary is impacted.

#### Ending Secondary Appointments (Same or Different School)

- Letter of Understanding (to be initiated by the appointing school)
- Faculty Data Form submitted [here](#).

#### Create Administrative Appointments (With no change in salary)

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## Faculty ACT Documents & Personnel Transactions

- Letter of Understanding (letter must detail the administrative title, effective date, the nature of the appointment, etc.).
- Faculty Data Form submitted [here](#).

### **Voluntary Appointment (when the primary assignment is a staff position)**

- Faculty Data Form submitted [here](#).
- Letter of Offer/ appointment letter. [Voluntary Appointment Form Link](#)
- Curriculum Vitae (Upload to OnBase Only)
- Original transcript of terminal degree (or highest degree when appropriate) must be on file in departmental and/or deans' office---to follow SACSOC guidelines.
- **Volunteer Faculty Background Check Request must be submitted before ACT Document is processed and approved.**

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