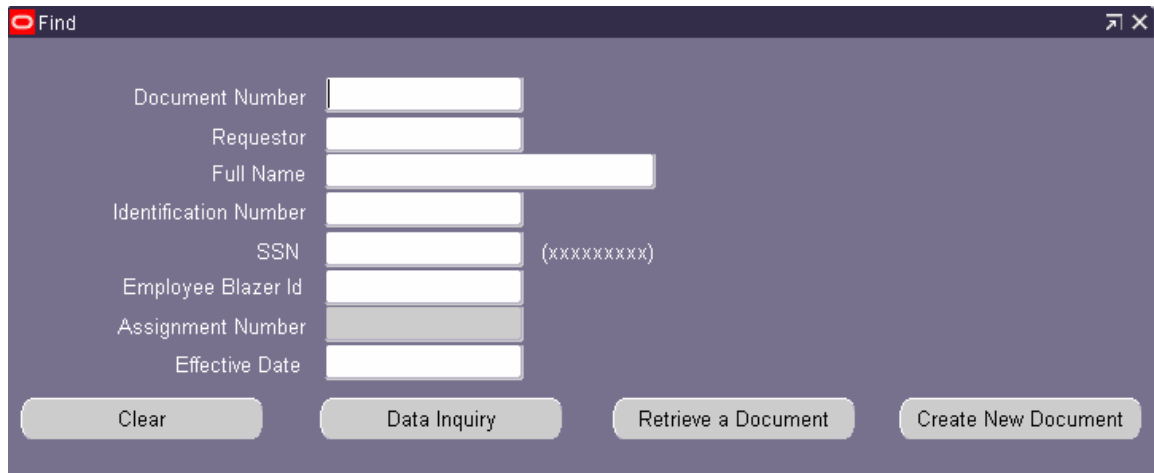


Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part One: Field Facts and Button Definitions

From the **FIND WINDOW** the user can perform the following tasks:

- Locate employee information.
- Locate, view and retrieve your documents as a Requestor.
- Locate and view ACT documents created by other Requestors who have the same level of responsibility.
- Locate and retrieve a specific ACT document.

UAB HR Officer → HR Transactions → ACT → Find Window



Find Window Field Facts



The **DOCUMENT NUMBER** field is used to locate a document that exists for an employee. Only one active document per active assignment can exist on an employee at one time. A document may be in **OPEN, READY, USER APPROVED, CENTRAL APPROVED, COMPLETED, OR CANCELED** status. For a description of each document status, [click here](#). A Requestor must know the document number in order to locate a specific document.



The **REQUESTOR** field is used to locate documents created by a specified requestor. The requestor name must be entered in the **last name, first name** format. If the Requestor is not found, use the LOV to locate the person. Use the percent (%) wildcard to narrow the search, and be as specific as possible. The LOV is not case sensitive. When the Requestor is selected or entered, the person's BlazerID will display in the field.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part One: Field Facts and Button Definitions

Full Name

The **FULL NAME** field can be used to view employee information, locate a document for the employee, or create a new document for the specified employee. The Full Name must be entered in the **last name, first name** format. If the employee is not found, use the LOV to locate the person. If you type in a percent sign (%) in the **FULL NAME** field you will be able to view all of the UAB employees in your organization. Use the percent (%) wildcard to narrow the search, and be as specific as possible. The full name LOV is not case sensitive.

Identification Number

The **IDENTIFICATION NUMBER** field can be used to view employee information. All UAB employees will be assigned an identification number once their initial hire document is processed through Central Administration. The **IDENTIFICATION NUMBER** field will not have an LOV. To locate an employee by their identification number, a Requestor must know the employee's number.

SSN

The **SSN (SOCIAL SECURITY NUMBER)** field can be used to view employee information. To locate an employee by their SSN, a Requestor must know the employee's number. The **SSN** field will not have an LOV. The Administrative Systems database will not acknowledge the employee's SSN number until their initial hire document is in a "**Complete**" Status.

Employee Blazer Id

The **EMPLOYEE BLAZER ID** field can be used to view employee information. To locate an employee by their Employee Blazer, a Requestor must know the employee's Blazer Id. The **EMPLOYEE BLAZER ID** field will not have an LOV.

Assignment Number

The **ASSIGNMENT NUMBER** field is a display field only. Some employees may have multiple assignments. To view information/documents or create a document for an employee with multiple assignments, a Requestor must make sure they choose the correct employee's assignment.

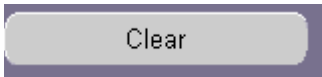
Effective Date

The **EFFECTIVE DATE** field is a future-use field. After a history has been started on an employee, you will be able to view a snapshot of the employee at a specified time in history.

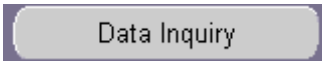
Example: The year is 2006. You want to see what Tia Rodriguez was doing 21-Dec-2004 and what her salary was at the time. You would enter her name, SSN, or Employee ID (any one of the three). You would enter 21-DEC-2004 in the Effective Date field, and click **DATA INQUIRY** button to view her information as of that date. The starting history effective dates will be 21-Sep-03 for biweekly paid employees and 01-OCT-2003 for monthly paid employees.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part One: Field Facts and Button Definitions

Find Window Button Definitions



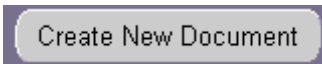
The **CLEAR** button is used to quickly clear all the **FIND WINDOW** fields. Information entered in the **FIND WINDOW** must be cleared before trying to locate another document or employee.



The **DATA INQUIRY** button when used will display only data for the specified employee and assignment. Once an employee has been located, the system will look for multiple assignments. If multiple assignments exist, an LOV of assignments for that employee will display. If only one assignment exists, the **DATA INQUIRY** forms will be populated. No document information is shown on the **DATA INQUIRY** form and if an employee has a document in process, the information will not be updated on the **DATA INQUIRY** forms until the document status reaches a "**COMPLETE**" status.



The **RETRIEVE A DOCUMENT** button is used to access a particular document on an employee. The Retrieve Document form is used for adding or editing current information on a document that is in **OPEN** status; canceling a document that has not been submitted but has been saved; reviewing a document that is in the approval process; and or reviewing documents that are in "**COMPLETE**" status.



The **CREATE NEW DOCUMENT** button is used to create a document for an existing employee or for a new employee, volunteer, or trainee award. Once a new document has been saved a document number is created. Once the document number has been created, a Requestor can use the **RETRIEVE A DOCUMENT** button to edit the information before it is submitted.

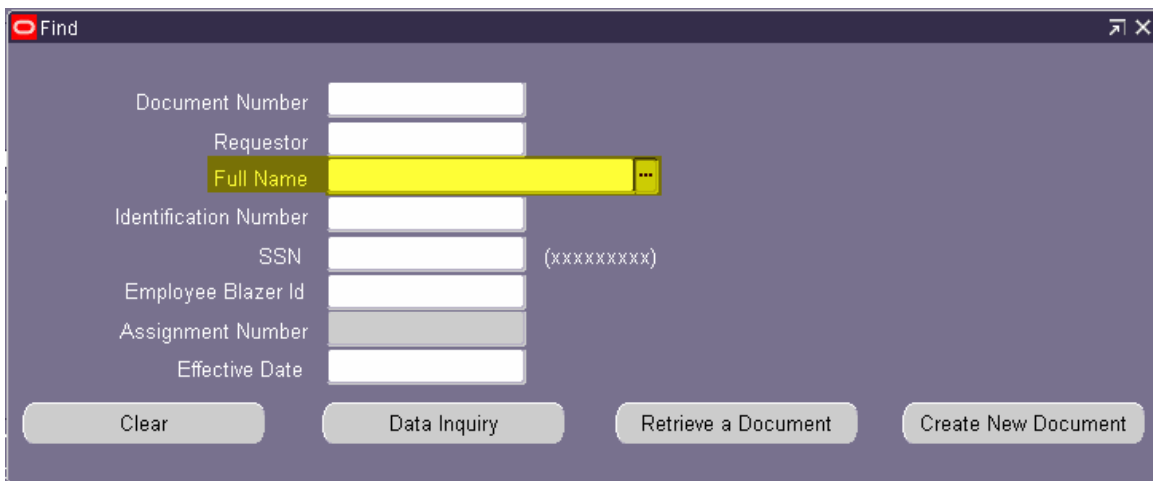
Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Two: Locating Employee Information

The **FIND WINDOW** allows a Requestor to locate a specific employee within an Organization by using one of four values:

- by % Wildcard function
- by Full Name
- by Identification Number
- by Social Security Number

Locating Employees using % Wildcard

1. On the **ACT FIND WINDOW**; click in the **FULL NAME** field.

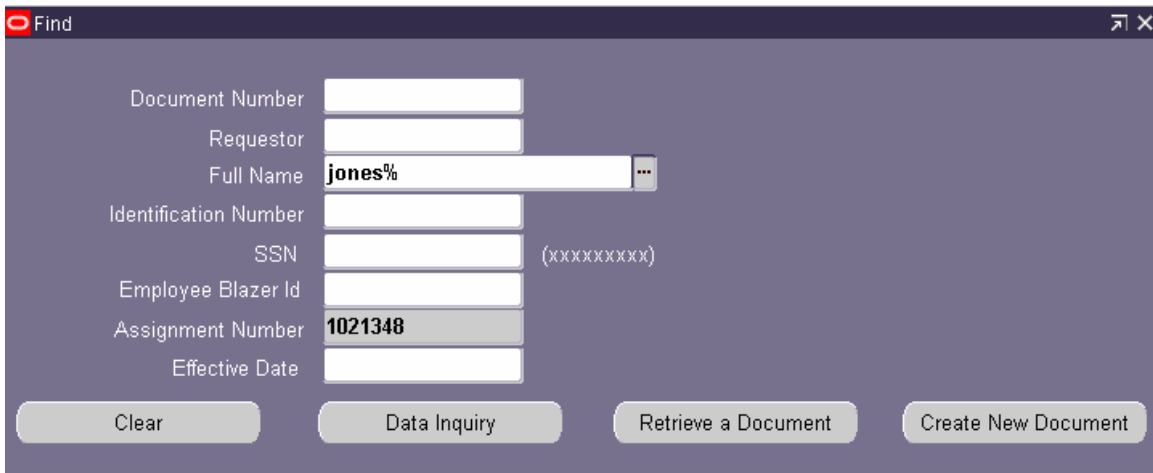


The screenshot shows the 'Find' window with the following fields and buttons:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	<input style="background-color: yellow; border: 2px solid yellow;" type="text"/>
Identification Number	<input type="text"/>
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

Buttons: Clear, Data Inquiry, Retrieve a Document, Create New Document

2. Type in the **UAB employee's Last Name** followed by the percent (%) wildcard.



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

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	<input type="text" value="jones%"/>
Identification Number	<input type="text"/>
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text" value="1021348"/>
Effective Date	<input type="text"/>

Buttons: Clear, Data Inquiry, Retrieve a Document, Create New Document

3. Press the **TAB** key.

4. An LOV listing all the employees by the specified last name will appear.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Two: Locating Employee Information

Employee Name X

Find Jones%

Full_Name	Assg_Ef_Start_Date	Assignment_Number	Org_Name	Assg_Status
Jones Putnam, Kellie E	01-OCT-2004	1002411	392200000 Microbiology	Active Assignment
Jones Thomas, Shirley H.	11-JUL-2004	1028666	379701000 UAB Center for H...	Active Assignment
Jones Thomas, Shirley H.	11-JUL-2004	1028666-2	379701000 UAB Center for H...	Active Assignment
Jones, Adriane Michelle	01-MAY-2005	1026188	113300000 Budget Administr...	Active Assignment
Jones, Adrienne R	31-OCT-2004	1013847	703450000 Emergency Servic...	Active Assignment
Jones, Ahmad R	01-JUL-2005	1015804	090000000 Athletics Departm...	Active Assignment
Jones, Alesia M	22-OCT-2003	1002892	704700000 HRM Recruitment	Active Assignment
Jones, Alfred Wayne	07-MAR-2005	1031822	112301000 Hospital Maintena...	Active Assignment
Jones, Allison L	06-APR-2005	1017337	702800000 Critical Care Tran...	Terminate Assignn
Jones, Amanda Hunt	01-MAY-2005	1009626	311402200 Med - Hematology...	Active Assignment
Jones, Amanda Hunt	22-OCT-2003	1009626-2	705800000 Medical Social Se...	Active Assignment
Jones, Amber L.	20-FEB-2005	1028359	704250000 Food & Nutrition S...	Active Assignment

Find OK Cancel

Note: You may see duplicate names for some employees. Employees who have more than one assignment will have the same identification number, but the second assignment will have the identification number followed by a dash and 2.

Jones, Amanda Hunt	01-MAY-2005	1009626	311402200 Med - Hematology...	Active Assignment
Jones, Amanda Hunt	22-OCT-2003	1009626-2	705800000 Medical Social Se...	Active Assignment

Before creating or retrieving a document on an employee with multiple assignments, make sure you choose the correct one from the list. Also be aware of the assignment effective start date.

- Highlight the employee you wish to view, and click on the **OK** button (or double click on the name). You may have to use the scroll bar to locate the employee.
- The **FULL NAME**, **IDENTIFICATION NUMBER**, and **ASSIGNMENT NUMBER** fields should be populated.

Find X

Document Number

Requestor

Full Name

Identification Number

SSN (xxxxxxxx)


Employee Blazer Id

Assignment Number

Effective Date

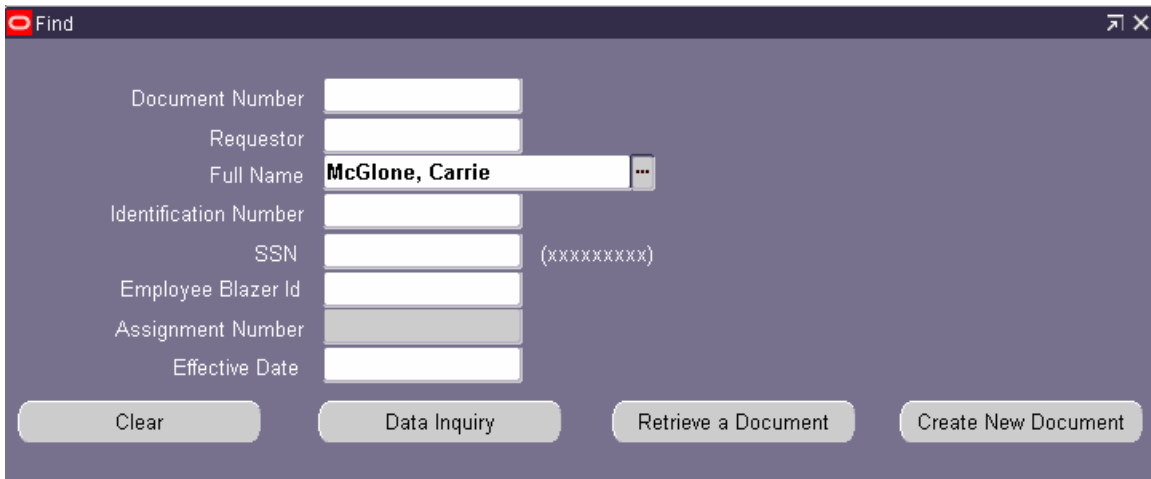
Clear Data Inquiry Retrieve a Document Create New Document

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Two: Locating Employee Information

7. Click the **DATA INQUIRY** button to view the employee's personal information. For instructions on viewing the **DATA INQUIRY FORM**, [click here](#). Click the **RETRIEVE A DOCUMENT** button to view completed documents or edit an open document. For instructions on **RETRIEVING A DOCUMENT**, [click here](#). Click **CREATE NEW DOCUMENT** to create a new document for an employee.
8. Click on the **FLASHLIGHT**  in the toolbar to return to the **FIND WINDOW**.
9. Before performing another search from the **FIND WINDOW**, click the **CLEAR** button. This will ensure that the previous employee's information is cleared from the search.

Locating Employees by Full Name

1. Clear the **FIND WINDOW**.
2. Enter *the correct name of an employee* in the **FULL NAME** field using the last name, first name format.

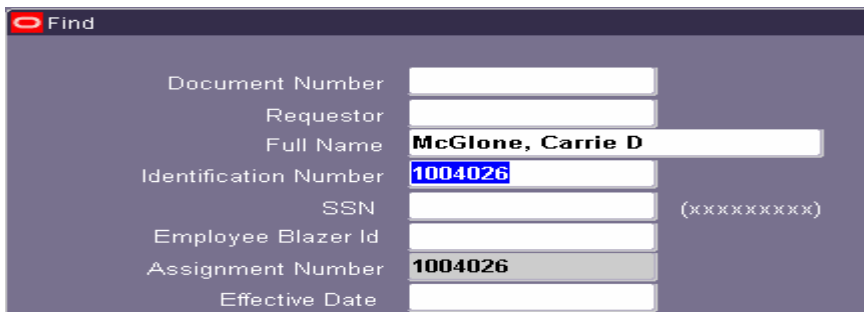


The screenshot shows the 'Find' window with the following fields and values:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	McGlone, Carrie
Identification Number	<input type="text"/>
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

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

3. Press the **TAB** key.
4. The **FULL NAME**, **IDENTIFICATION NUMBER**, and **ASSIGNMENT NUMBER** fields should be populated.



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

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	McGlone, Carrie D
Identification Number	1004026
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	1004026
Effective Date	<input type="text"/>

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Two: Locating Employee Information

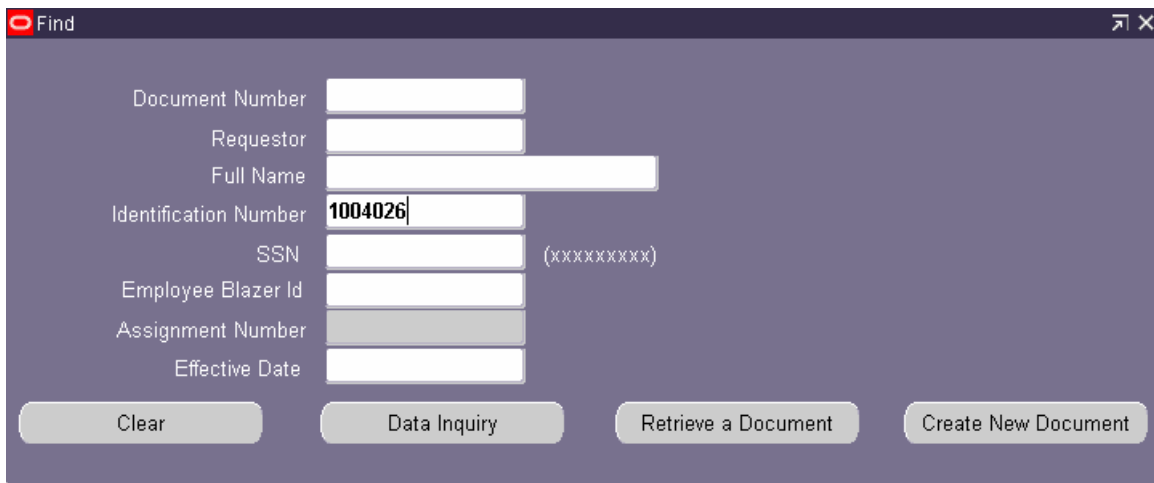
5. Click on **DATA INQUIRY**, **RETRIEVE A DOCUMENT**, or **CREATE NEW DOCUMENT** for this employee.

Quick Tip: You can “speed up” this process. After entering the employee’s correct name click on any one of the three form buttons – **DATA INQUIRY**, **RETRIEVE A DOCUMENT**, or **CREATE NEW DOCUMENT**. You will be taken directly to the employee’s information.

Locating Employees by Identification Number

UAB DOES NOT UTILIZE AN EMPLOYEE’S SOCIAL SECURITY NUMBER AS EMPLOYEE IDENTIFIERS. INSTEAD UAB EMPLOYEES WILL BE ASSIGNED A SEVEN-DIGIT IDENTIFICATION NUMBER AFTER THEIR INITIAL HIRE DOCUMENT HAS ENTERED COMPLETE STATUS.

1. Clear the **FIND WINDOW**.
2. Enter *the Employee’s Identification Number*.



The screenshot shows a window titled "Find" with a search form. The form contains the following fields and buttons:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	<input type="text"/>
Identification Number	<input type="text" value="1004026"/>
SSN	<input type="text" value="(xxxxxxxx)"/>
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

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

3. Press the **TAB** key.
4. The **FULL NAME**, **IDENTIFICATION NUMBER**, and **ASSIGNMENT NUMBER** fields should be populated.
5. Click on **DATA INQUIRY**, **RETRIEVE A DOCUMENT**, or **CREATE NEW DOCUMENT** for this employee.

Quick Tip: You can “speed up” this process. After entering the employee’s correct name click on any one of the three form buttons – **DATA INQUIRY**, **RETRIEVE A DOCUMENT**, or **CREATE NEW DOCUMENT**. You will be taken directly to the employee’s information.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Two: Locating Employee Information

Locating Employees by Social Security Number

1. Clear the **FIND WINDOW**.
2. Enter the **Employee's Social Security Number without the dashes**. Enter only nine numbers. If you forget and enter the dashes, you will get an error message. Click **OK** to clear the error message and retype with the dashes.
3. Press the **TAB** key.
4. The **FULL NAME, IDENTIFICATION NUMBER, and ASSIGNMENT NUMBER** fields should be populated.
5. Click on **DATA INQUIRY, RETRIEVE A DOCUMENT, or CREATE NEW DOCUMENT** for this employee.

Quick Tip: You can “speed up” this process. After entering the employee's correct name click on any one of the three form buttons – **DATA INQUIRY, RETRIEVE A DOCUMENT, OR CREATE NEW DOCUMENT**. You will be taken directly to the employee's information.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents

The **FIND WINDOW** allows the Requestor to *locate*, *view* and *retrieve* documents created for a specific employee. These documents may be in any status: **OPEN, READY, USER-APPROVED, CENTRAL APPROVAL, COMPLETED OR CANCELED**. Only the documents that are still in **OPEN** status may be edited. Once a document is submitted for approval, is canceled, or reaches a completed status, it becomes a view only document for the Requestor.

Documents can be located and retrieved using one of the following methods:

- Entering your name in the **REQUESTOR** field.
- Entering another Requestor's name within your organization in the **REQUESTOR** field.
- Document Number.
- A Future-Dated Document

Locating and Retrieving Your Documents by Requestor

1. Clear the **FIND WINDOW**.
2. Click inside the **REQUESTOR** field and type your **LAST NAME, FIRST NAME**.

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

- Document Number:
- Requestor: **McGlone, Carrie** ...
- Full Name:
- Identification Number:
- SSN: (xxxxxxxxxx)
- Employee Blazer Id:
- Assignment Number:
- Effective Date:

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

3. Click on **RETRIEVE A DOCUMENT** to view your list of documents.

Document Number

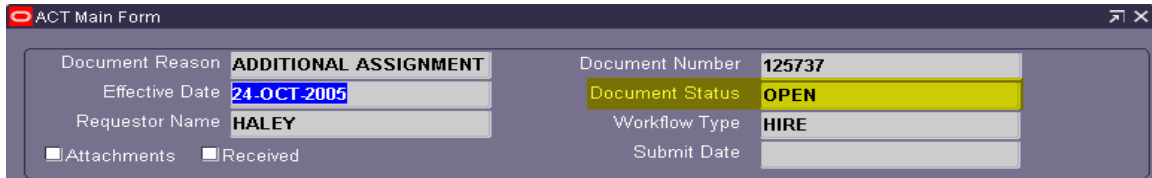
Find %

Effective_Date	Doc_Reason	Full_Name	Assgn_No	Doc_No	Status
24-OCT-2005	ADDITIONAL ASSIGNMENT	Clark, Samuel		125737	OPEN
17-OCT-2005	CREATE VOLUNTEER	Alexander, JoAnne	1033579	125736	COMPLETE
06-JAN-2006	REHIRE	Belcher, Samantha	1033577-2	125734	COMPLETE
06-JAN-2006	REHIRE	Belcher, Samantha		125732	CANCELED
06-JAN-2006	NEW HIRE			125731	OPEN
25-SEP-2005	TRANSFER LATERAL/SAME ...	Castaneda, Ludwin...	1025442	125728	READY
25-SEP-2005	SALARY SCHEDULE ADJUS...	Castaneda, Ludwin...	1025442	125727	CANCELED
03-JAN-2006	REHIRE	Belcher, Samantha		125726	CANCELED
06-JAN-2006	NEW HIRE			125718	CANCELED
30-JUN-2005	TERMINATE EMPLOYEE	Belcher, Samantha	1033577	125717	COMPLETE
01-OCT-2004	NEW HIRE	Belcher, Samantha	1033577	125716	COMPLETE
31-OCT-2005	NEW TRAINEE AWARD	Geer, Richard	1033576	125709	COMPLETE
31-OCT-2005	NEW HIRE			125708	OPEN

Find OK Cancel

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents

4. Locate the document you want to view; click **OK**.
5. The document will open for viewing/editing. **Remember you can edit only documents in “Open” status.**



The screenshot shows a window titled "ACT Main Form" with a search criteria table. The table contains the following information:

Document Reason	ADDITIONAL ASSIGNMENT	Document Number	125737
Effective Date	24-OCT-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents

Locating and Retrieving another Requestors Documents:

ACT allows for Requestors within the same responsibility to retrieve another Requestor's document for processing and approval.

1. Clear the **FIND WINDOW**.
2. Click inside the **REQUESTOR** field.
3. Type the Requestor's *last name, first name*.

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

- Document Number: [Empty]
- Requestor: Sweet, Barbara
- Full Name: [Empty]
- Identification Number: [Empty]
- SSN: [Empty] (xxxxxxxx)
- Employee Blazer Id: [Empty]
- Assignment Number: [Empty]
- Effective Date: [Empty]

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

4. Press the **TAB** key. If the Requestor is found, his or her BlazerID will appear in the field.

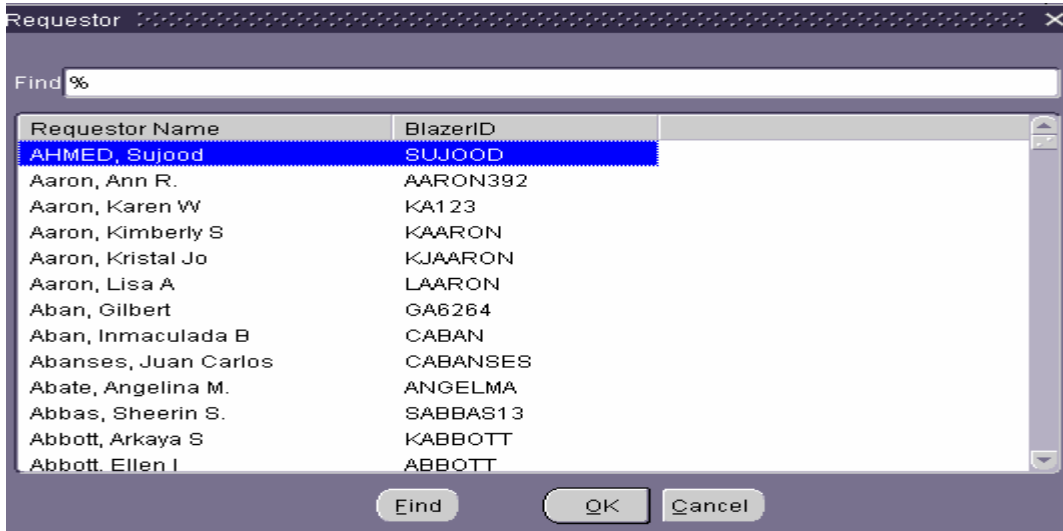
The screenshot shows the 'Find' window with the Requestor field containing 'BLS'. A list of requestors is displayed below:

Effective_Date	Doc_Reason	Full_Name	Assgn_No	Doc_No	Status
25-JUL-2005	NEW HIRE			125410	OPEN
25-JUL-2005	NEW HIRE			125408	READY
25-JUL-2005	NEW HIRE			125399	READY
25-JUL-2005	NEW HIRE			125395	READY
13-AUG-2005	TERMINATE EMPLOYEE	Donaldson, Jason	1006540	125389	READY
18-AUG-2005	MEDICAL LEAVE WITHOUT ...	Harvey, Valencia	1030960	125384	READY
07-AUG-2005	TRANSFER LATERAL/DIFFE...	Waddle, Sandy K	1009031	125347	OPEN
11-JUL-2005	NEW HIRE			125260	USER_APPROVED
24-JUL-2005	TRANSFER LATERAL/SAME ...	Reeder, Christie R	1007984	125248	USER_APPROVED
15-AUG-2005	TERMINATE EMPLOYEE	Long, Donna A	1001540	125230	USER_APPROVED
16-JUL-2005	TERMINATE EMPLOYEE	Pickens, Christie	1031400	125169	USER_APPROVED
01-MAY-2005	TERMINATE EMPLOYEE	Taylor, Ellen B	1014896	125157	USER_APPROVED
17-JUL-2005	FMLA WITH PAY	McDonald, Kimberly A	1006396	125089	USER_APPROVED

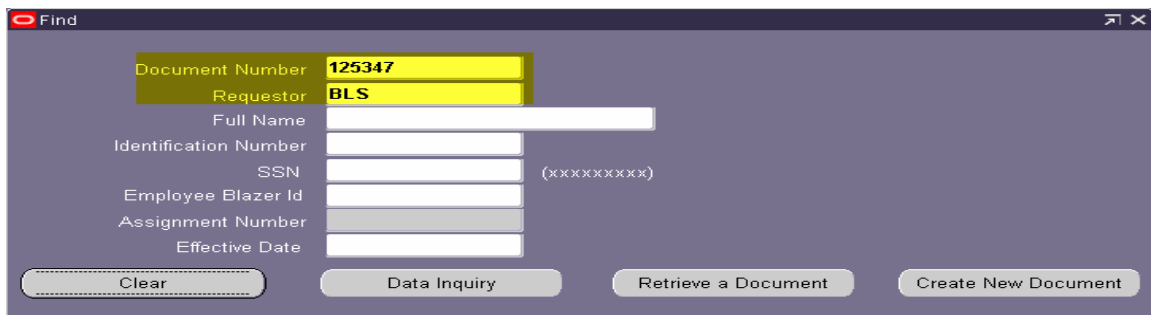
Buttons at the bottom: Find, OK, Cancel.

5. If the Requestor is not found, the **REQUESTOR LOV** will open with a list of all of Requestors in your organization.

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents



6. Enter the **last name of the requestor and the percent symbol (%)** to view a filtered list of Requestors. Once you have located the appropriate Requestor, click **OK**.
7. Click on the **RETRIEVE A DOCUMENT** button to view a list of the Requestor's documents.
8. Select the document you want to view or edit; click **OK**. **Remember you can edit only documents in an "Open" status.**
9. The **FIND WINDOW** displays the **DOCUMENT NUMBER** and the **REQUESTOR'S BLAZER ID**.



10. Click the **RETRIEVE A DOCUMENT** button in order to view the document.

In order to edit a document created by another Requestor, you will have to "**Take the Document**". For instructions on: "**Taking a Document**" [click here](#).

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents

Locating and Retrieving Documents by Document Number

It is recommended that you keep a list of your documents in order to quickly locate a document by the document number.

*When creating a document for a new employee (volunteer, trainee or new hire), it is **strongly recommended** you record the document number. Until the New Hire Document reaches a “Complete” status, your information can only be retrieved by document number or Requestor. The Administrative Systems can not locate new employees by name or social security number until the New Hire Document reaches a “Complete” status.*

1. Clear the **FIND WINDOW**.
2. Enter *the document number* in the **DOCUMENT NUMBER** field.

Document Number	125156
Requestor	
Full Name	
Identification Number	
SSN	(xxxxxxxx)
Employee Blazer Id	
Assignment Number	
Effective Date	

Clear Data Inquiry Retrieve a Document Create New Document

3. Click on the **RETRIEVE A DOCUMENT** button. The document will appear in the **ACT MAIN FORM**. If the document is still in **OPEN** status, you will be able to edit the information. If it is in any other status, the document will be view only.

Document Reason	TRANSFER LATERAL/DIFFE	Document Number	125156
Effective Date	10-JUL-2005	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	CHANGE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Berrett, Charles Swafford	Gender	Male
Identification Number	1032159	Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Latest Hire Date	17-APR-2005	Total Annual Salary	5,709.08
Date of Birth	24-MAR-1970	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1032159	Assignment Status	Active Assignment
Assignment Category	04 Irregular	Organization	708450000 Resource Manag
Job	HB002N2.Respiratory Thera	Position	708450000.87103.031001
FTE	.1	Primary	Y
Assignment Salary	5,709.08	Payroll	Biweekly

Person Address Assignment Salary Element Entries Labor Sources

Comments

Person Data Address Assignment Salary Element Entries Labor Sources

Save Submit Cancel this document Log Reassign

Appoint, Change and Terminate (ACT) Documentation Using the ACT Find Window – Part Three: Locating and Retrieving Documents

Locating and Retrieving Future Dated Documents

If you wish to view a future-dated document, perform the following steps:

1. In the **FIND WINDOW**, use one of the methods described above to locate the employee. For example, click in the **FULL NAME** field, type in ***the last name of the employee followed by the %***. Press the **TAB** key.
2. In the **EFFECTIVE DATE** field, enter ***the date of the future dated document***. For example: **01-DEC-2005**.
3. Click on **RETRIEVE A DOCUMENT**.
4. A list will appear of documents that have been prepared for this employee. Double-click on the future-dated document to view the document.

[**RETURN TO TOP**](#)