Appoint, Change and Terminate (ACT) Documentation
Data Change

The **DATA CHANGE** document is used to insert, update or correct an employee's personnel record in the Administrative System. When using the Data Change document reason the HR Officer will be able to make changes to the following personal information fields when using a current or future document effective date: name, address, phone, schools and colleges, location of assignment, timecard distribution number, timekeeping method, timekeeping organization, and/or changes in FTE within the same assignment category. ***Only select fields are available for change when using a retroactive effective date***.

UAB HR Officer → HR Transactions → ACT → Find Window

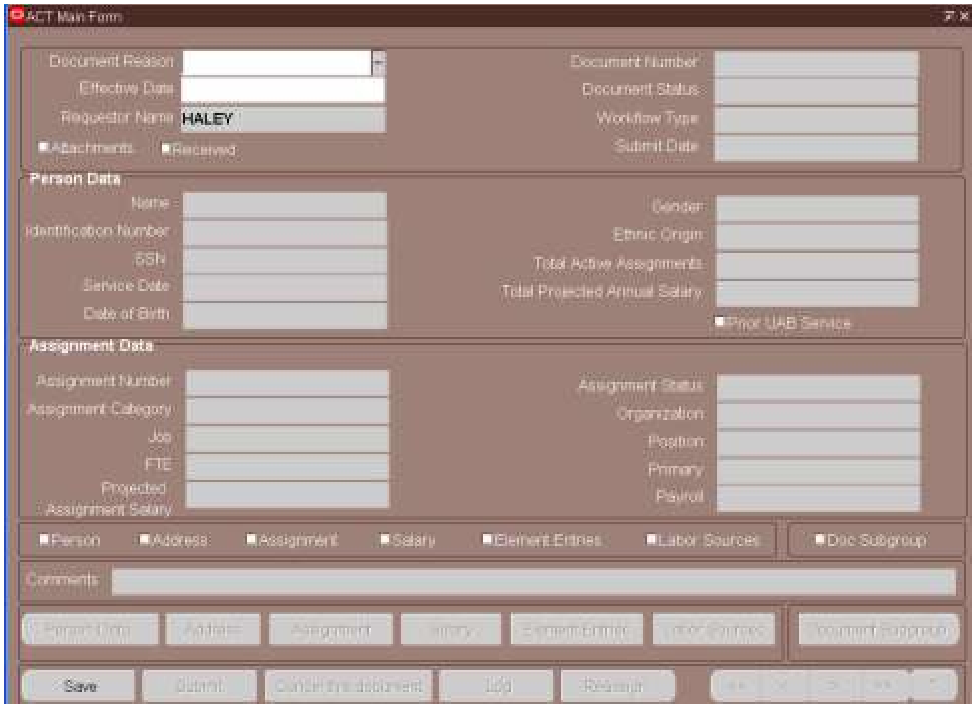
<u>Creating a Data Change Document</u>

1. Locate the employee using the Find Window.

2. Click on the **CREATE NEW DOCUMENT** button.

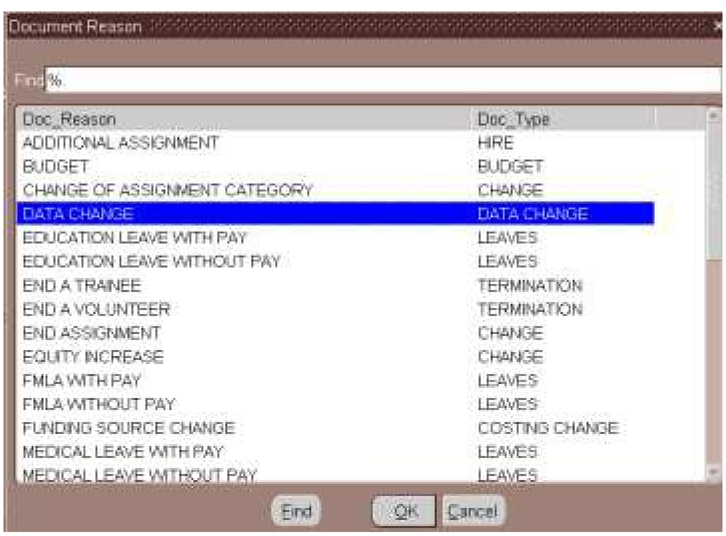
<u>Note:</u> After you click on the **CREATE NEW DOCUMENT** button you might see another window pop up. Some employees may have more than one assignment and could be listed several times. Make sure to select the correct assignment.

The **ACT MAIN FORM** will open.



3. When the new document opens, click once in the **DOCUMENT REASON** field.

4. Use the **DOCUMENT REASON LOV** to choose **DATA CHANGE** or type the words ***Data Change*** in the **DOCUMENT REASON** field.

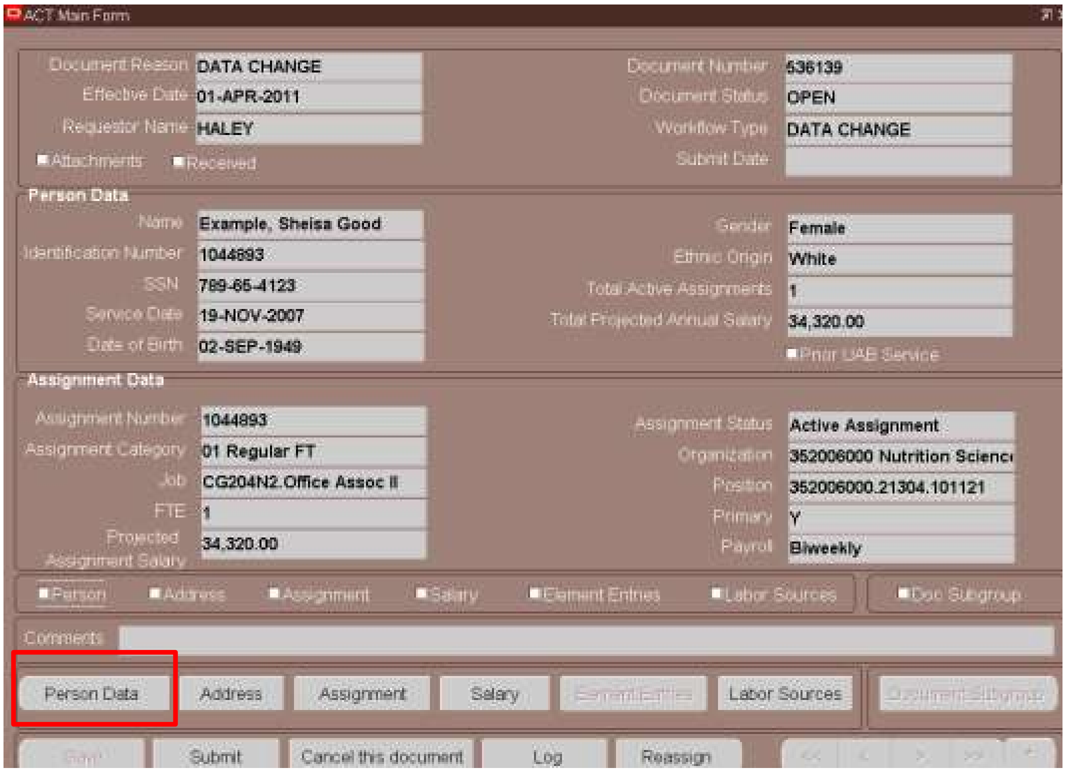


5. Click inside the **EFFECTIVE DATE** field, choose an effective date from the **CALENDAR LOV** or ***type in the desired date***.

6. Click on the **SAVE** button at the bottom of the form.

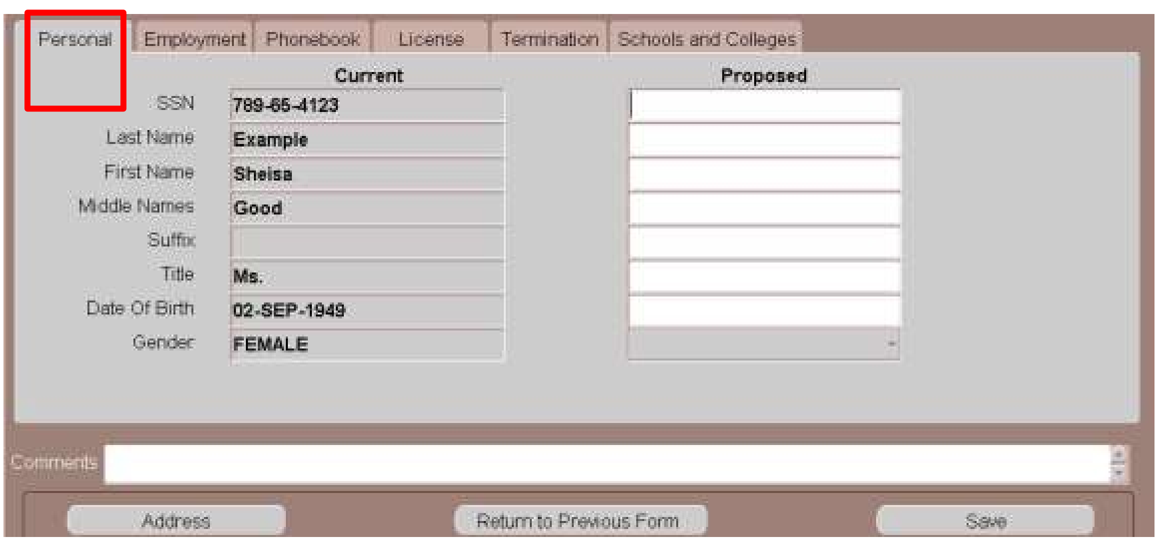
Updating Personal Data

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

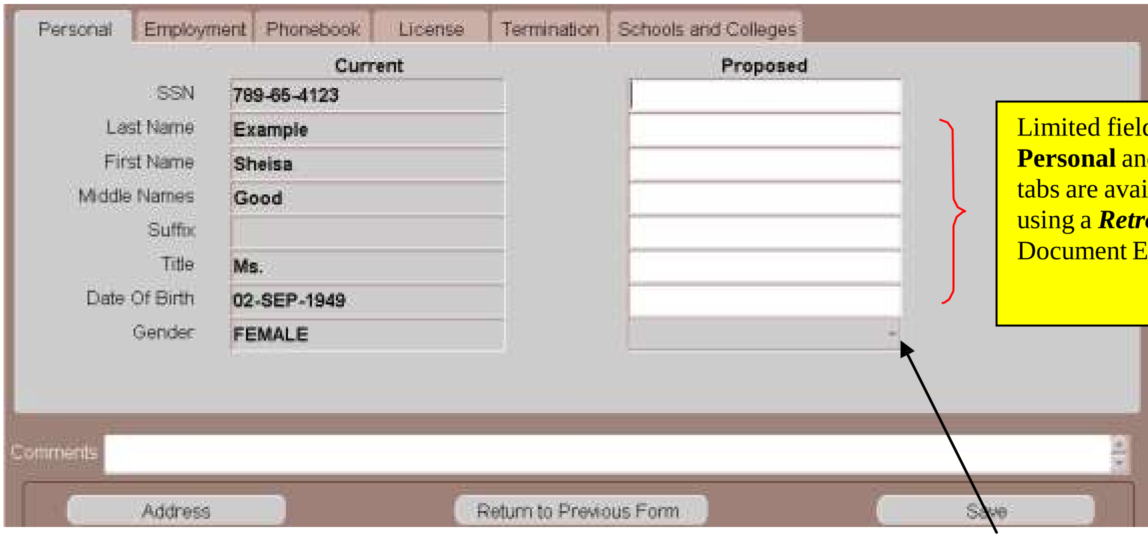


When the **PERSON DATA** form opens, you should be on the **PERSONAL** tab.

Personal Tab

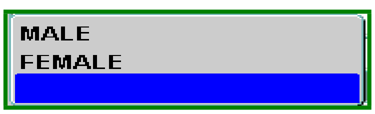


1. Verify each field, if changes are necessary; click in the appropriate **PROPOSED** field, enter the correction.



Limited fields on the **Personal** and **Phonebook** tabs are available when using a ***Retroactive*** Document Effective Date.

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



3. Once all necessary fields have been updated or changed; click on the **SAVE** button; the screen will advance to the **SCHOOLS AND COLLEGES** tab.

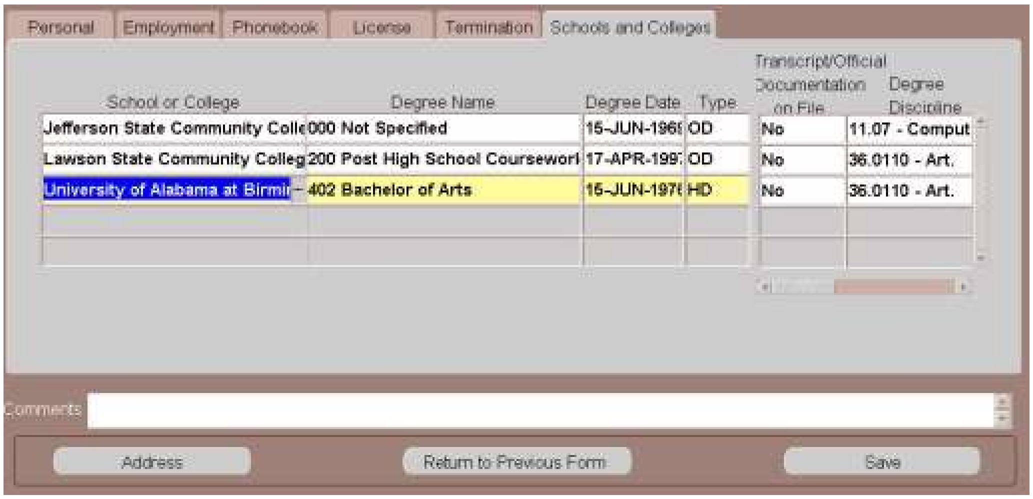
Schools and Colleges

When Schools and Colleges information displays, you should verify the information displaying is accurate and up-to-date.

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

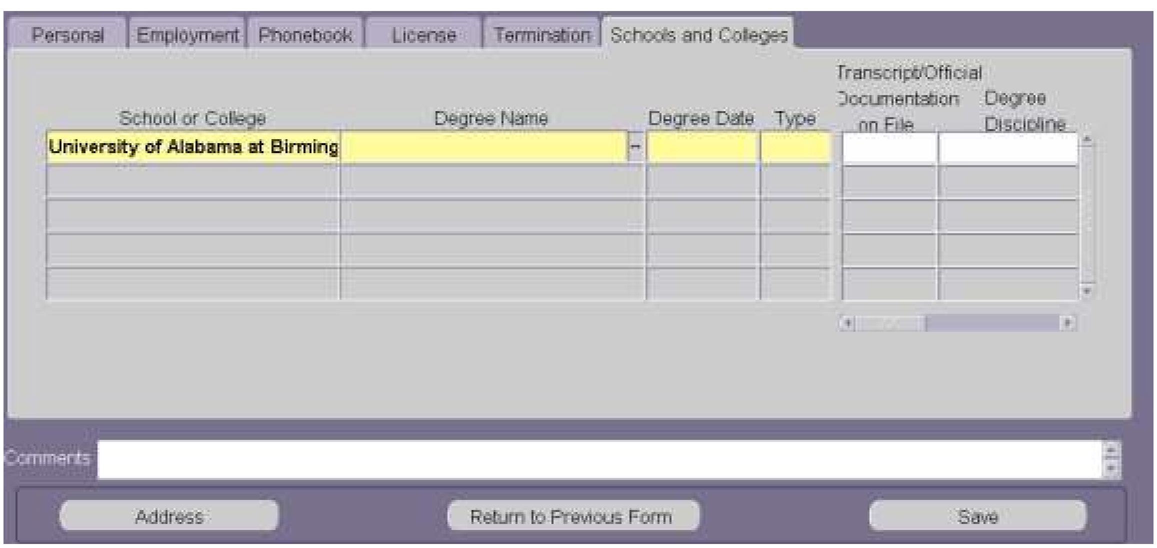
If previous Schools and Colleges information is ***not accurate***, you may:

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



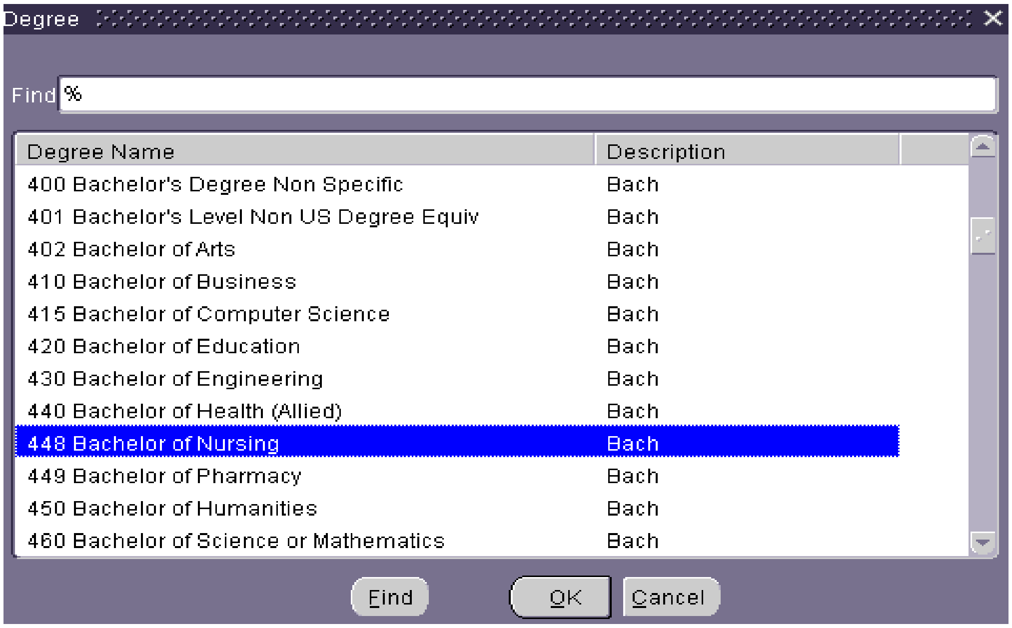
If Schools and Colleges information does not display, proceed to enter applicable information:

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

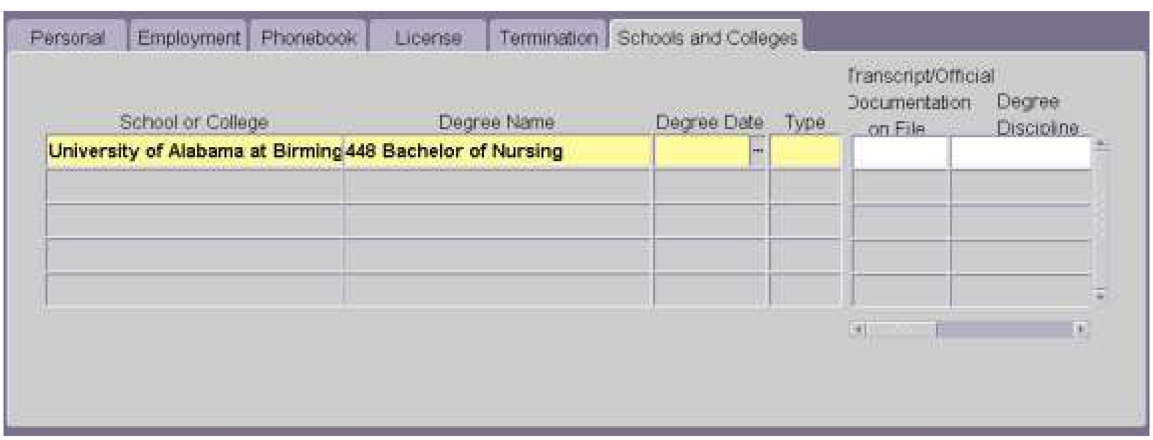


Note: The School and College LOV include listings of Institutions within the United States however; if the institution does not appear in the LOV listing, select Institution Not Available in Listing. For Institutions outside of the United States select Foreign University.

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.**



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



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.

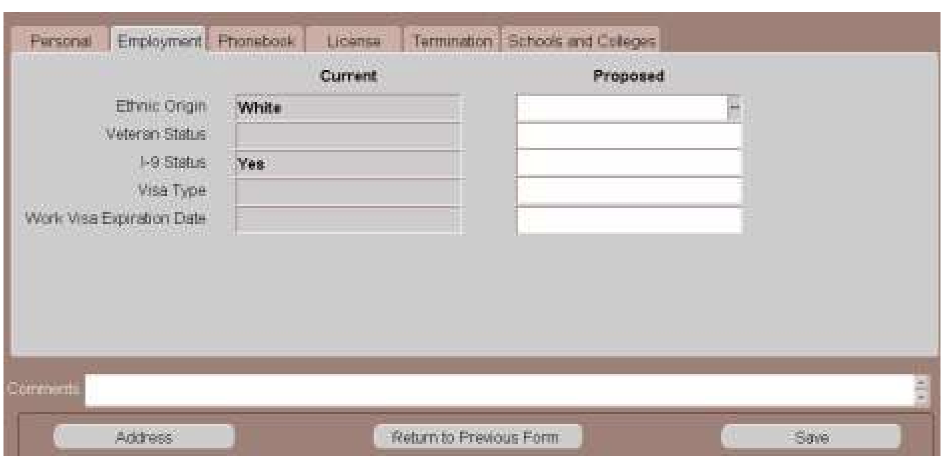
6. For Faculty and Credential Staff Course Instructors only. Type ***Yes*** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.

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.

Click the **SAVE** button located at the bottom of the form; click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

FORM. **Employment Tab**

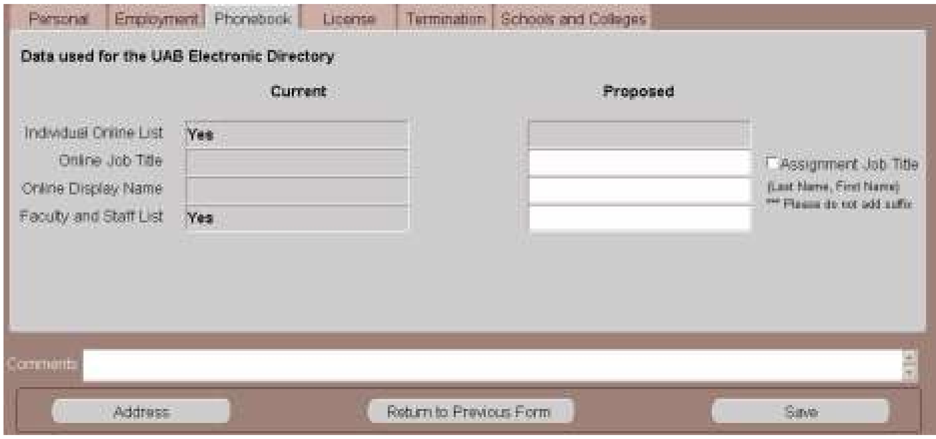
If necessary, enter the correct information in the appropriate field. For Instructions on how to enter information in the below fields, ***click here***.



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

Phonebook Tab

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



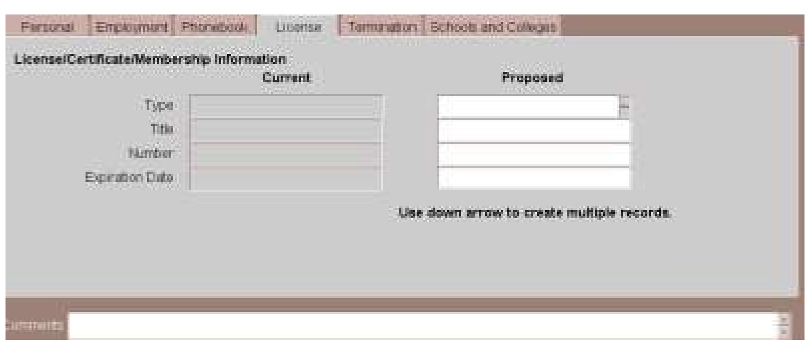
To replace the Job Title displaying in the Electronic Phonebook; check the **Assignment Job Title** check box to populate the **Proposed Online Job Title** field with the official Assignment Job Title; or manually enter a new Job Title

To change the name displaying in the Electronic Phonebook, enter Full Name (using example format) in the **Proposed Online Display Name** field.

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

License Tab

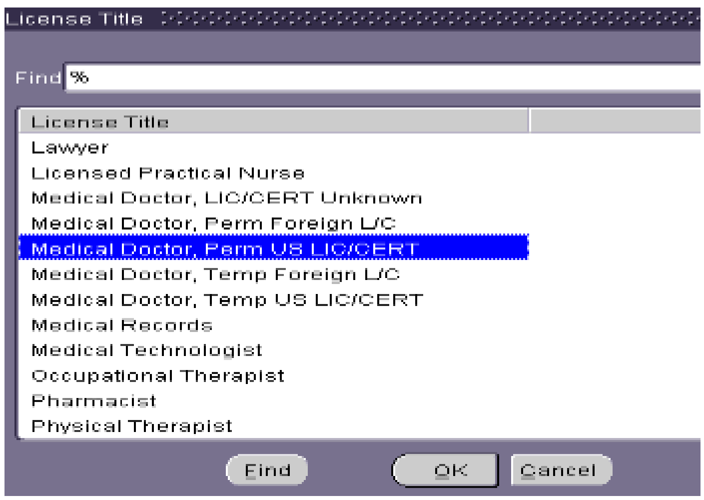
If necessary, enter the correct information in the appropriate field. **Note: Information entered on this tab is entered only when the employee holds a professional license, membership or certification.**



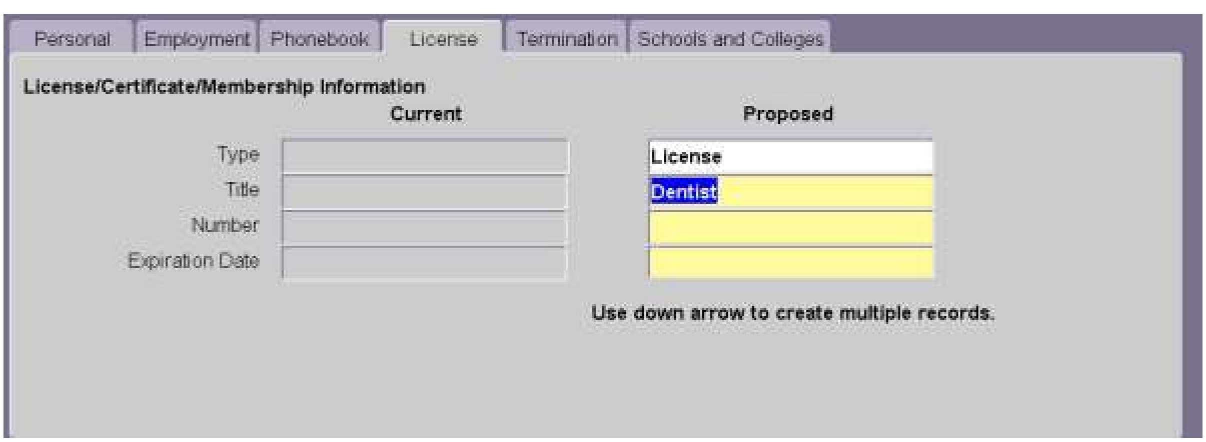
1. Using the LOV in the **TYPE** field; choose the ***appropriate License type***.

   Note:* *If you choose <u>License</u>, the Title, Number, and Expiration Date fields become <u>required</u> fields.

2. If ***License*** is selected, listing of **LICENSE TITLES** appears. Select the appropriate ***License title***, Click **OK**.



3. If ***Certification, Membership or Professional Competency,*** type ***the appropriate title*** in the **TITLE** field**.**



a. Type the ***License Number*** in the **NUMBER** field, if applicable.

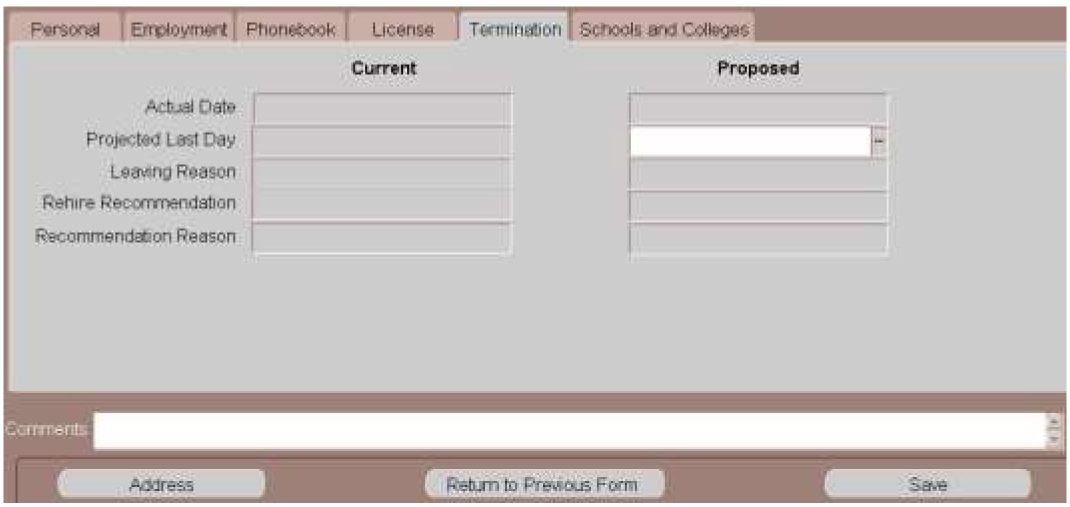
b. In the **EXPIRATION DATE** field, choose the ***expiration date*** from the Calendar LOV or type the ***date*** in the **EXPIRATION DATE** field using the ***dd-mmm-yy*** format.

Note:* *This date must be a future date.

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

Termination Tab

If you have to enter a ***Last Day of Work*** for this employee, click on the **TERMINATION** tab.



1. Click in the **PROJECTED LAST DAY OF WORK** field. Choose the appropriate date from the **CALENDAR LOV** or type it into the field.

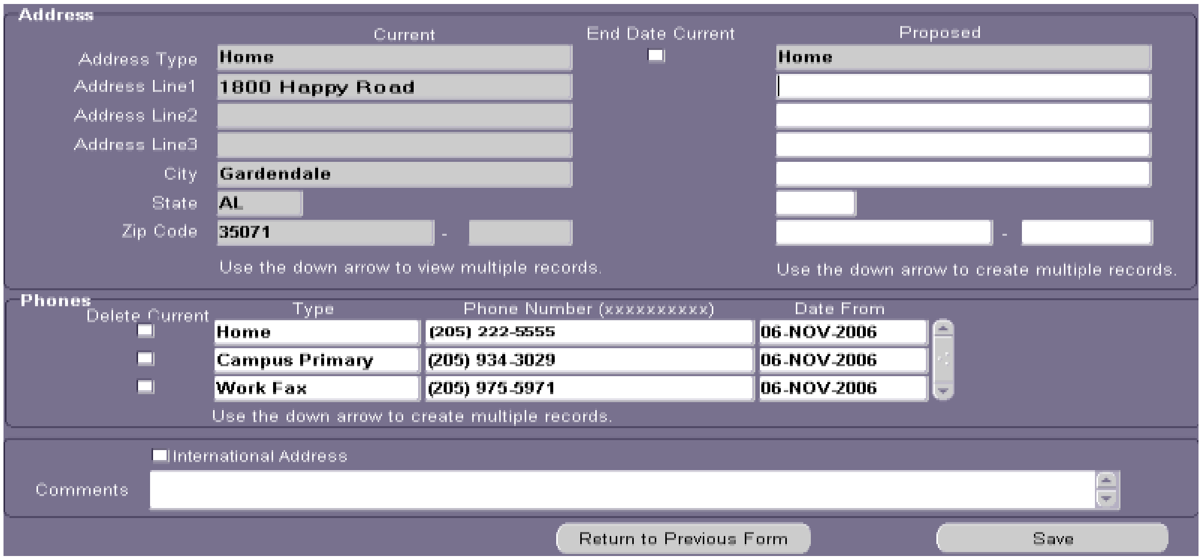
2. Click on the **SAVE** button if you have made changes, then click on the **RETURN TO PREVIOUS FORM.**

Updating Address and Phone Information

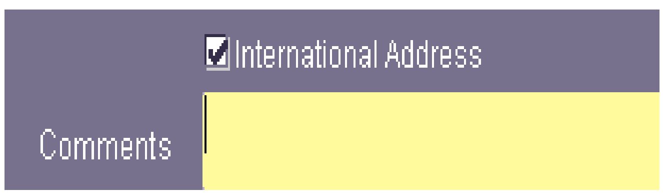
To update or change the employee's Address or Phone information, click on the **ADDRESS** button at the bottom of the **ACT MAIN FORM**.

The **ADDRESS AND PHONES** form will open.

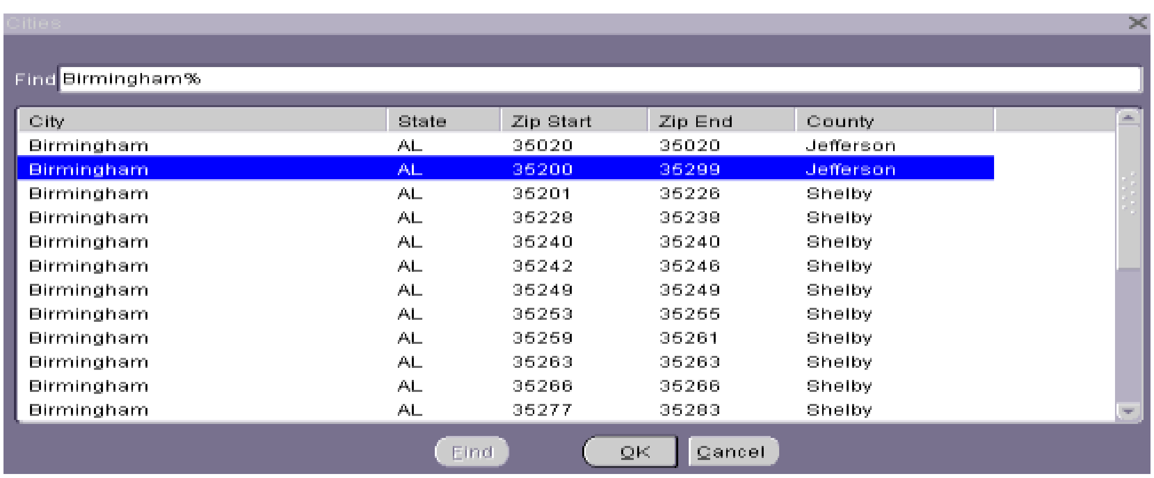
Note: All employees must have a local (US) address and/or campus address in order to receive correspondence. Employees can change their home address through the Self Service once their New Hire Document is in COMPLETE status, Campus Address and phone numbers must be changed via a Data Change ACT Document.



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.



1. To enter the **home address**, enter the **employee's street address** in the ADDRESS LINE 1 field. There are two more address lines available if needed.



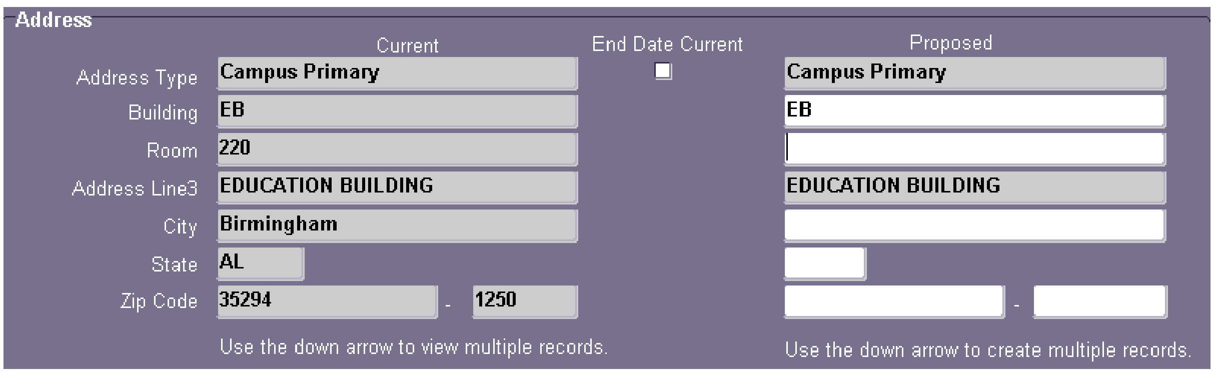
2. Highlight the ***correct zip code range*** for the city and county in which the employee lives. Click ***Ok***. This will populate the City and State field.

3. Click **i**n the **Zip Code** field, type the ***correct Zip Code.*** Click **Save.**

4. To enter the **campus address**, click in the **Address Type** field and ***press the down arrow***. The **Address Type** field switches to **Campus Primary**.

5. 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.

6. 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.



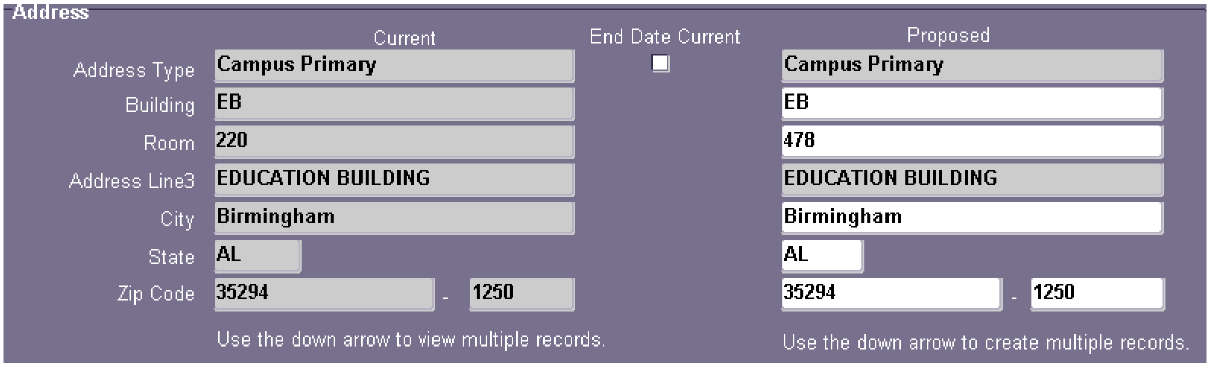
Note: Building field LOV provides a listing of all UAB Buildings and Building Codes. This is a rather long list so be as specific as possible when trying to locate a building. Using the percent (%) sign and the first letter of the building name will help to limit the list.

8. Enter the ***room or floor number*** in the **Room** field.

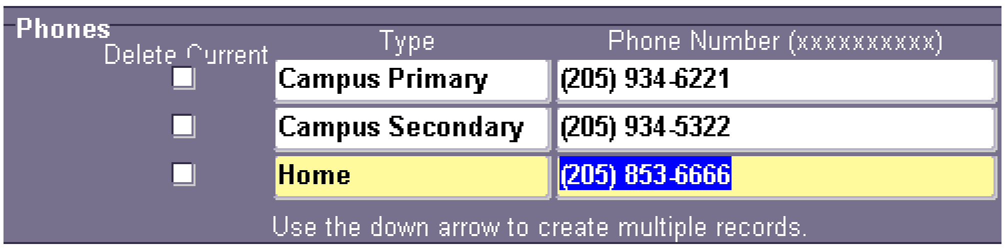
9. In the **City** field, type in the ***name of the city*** in which the UAB building is located. The **Cities** LOV will open***;*** select the ***correct Zip Start-Zip End*** range for the UAB building selected. Click **OK***.*

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.



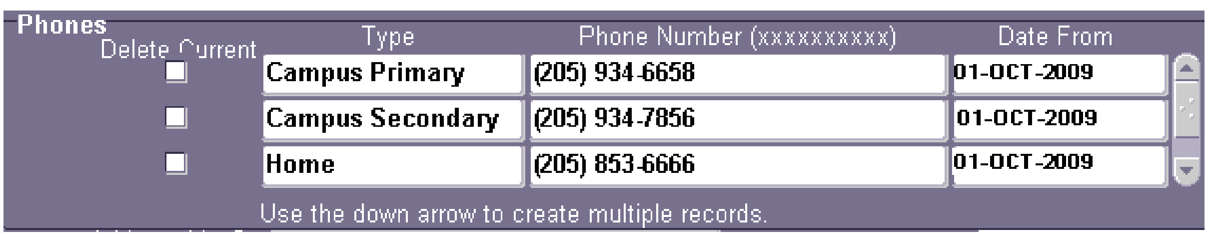
If phone numbers are changing, click once in the **PHONE NUMBER** field for the **TYPE** to be changed.



1. Enter the ***employee's current ten digit phone number*** in the **PHONE NUMBER** field without dashes.

2. Type the ***effective start date*** in the **DATE FROM** field or use the calendar LOV. ***<u>This is the effective date of the Data Change ACT document</u>***.

3. Repeat the above steps to change additional phone numbers for the employee. Use the down arrow on your keyboard to enter multiple records, if necessary.

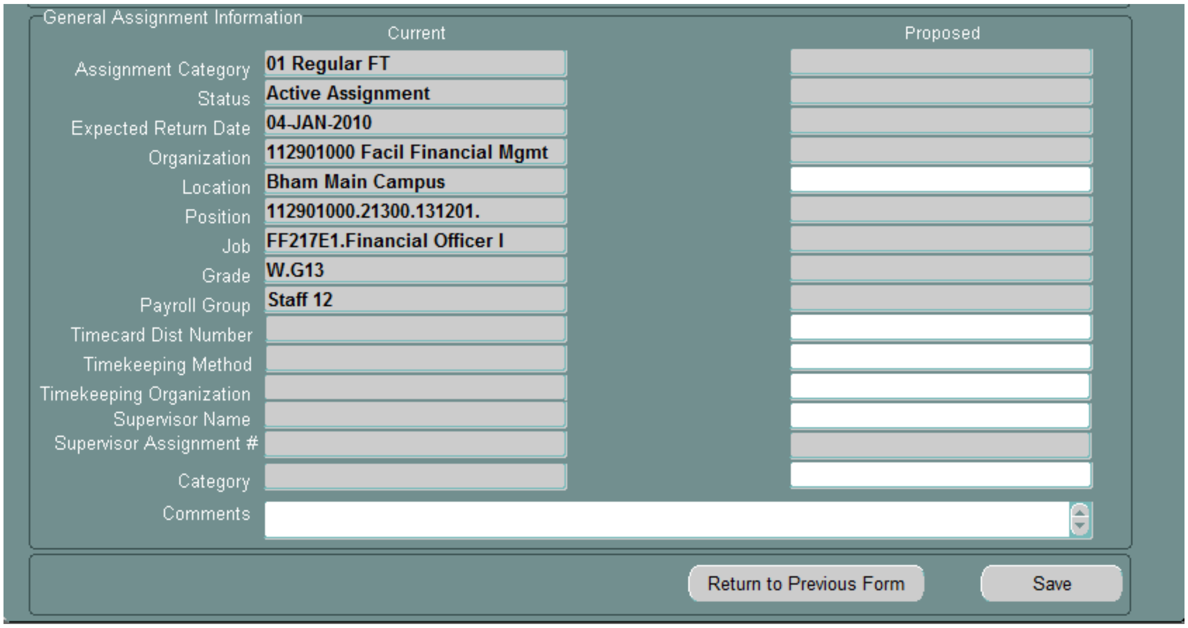


4. Click **SAVE** at the bottom of the form.

5. Once **ADDRESS AND PHONE** information has been updated, click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM.**

<u>Updating Assignment Information</u>

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



1. Click in the Proposed **Location** field to change the employees work location.

2. If this is a biweekly assignment, and the employee's timekeeping information is changing:

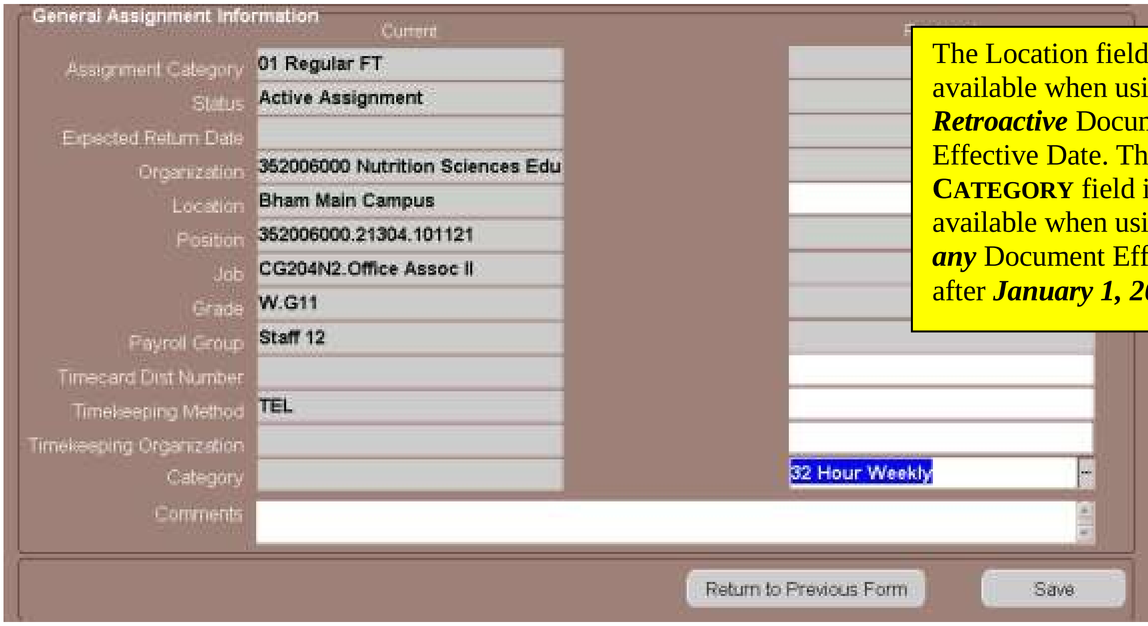
   a. If your organization has designated several timekeeper approvers, the Workflow Officer for your organization may have assigned Timecard Distribution Numbers to each timekeeper. If your timekeepers have these numbers, enter the ***timecard distribution*** *number* of the person to whom this employee's timesheet should be distributed to in the **Timecard Dist Number** field.

   b. Enter ***TAMS*** (Hospital employees), ***DB*** (Design Build employees) or ***TEL*** (Time Entry, and Labor for the rest of the campus) in the **Timekeeping Method Field** or use the LOV to enter the information.

   c. If the timekeeping organization is different from the appointing organization, enter the ***organization*** in the **Timekeeping Organization** field or select it from the LOV.

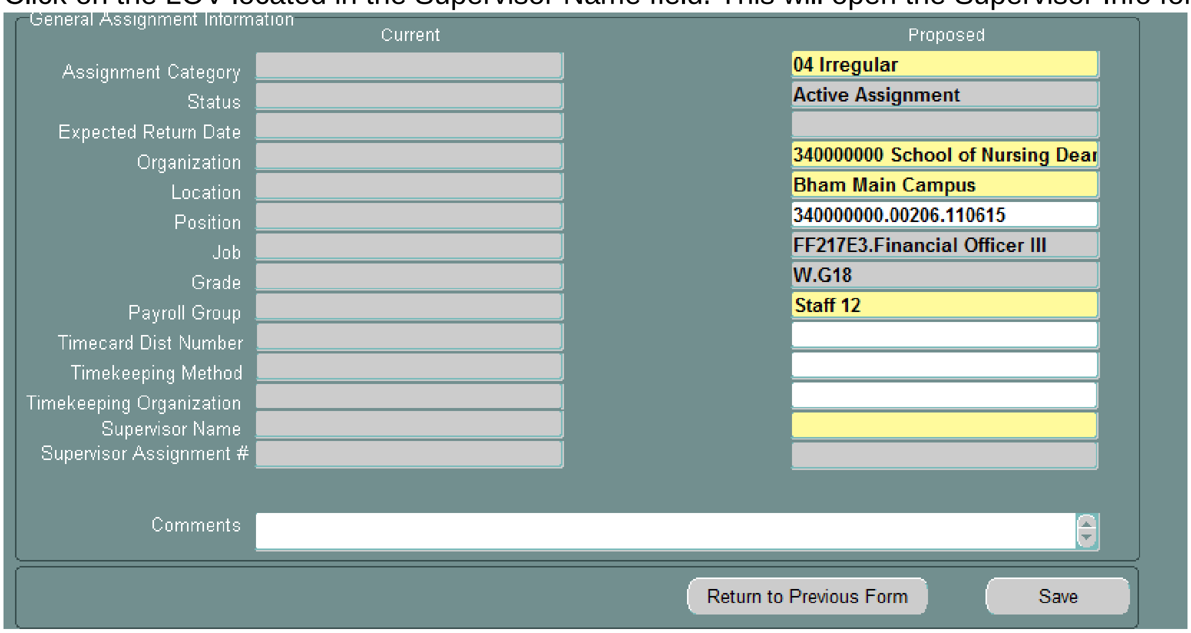
If this is a monthly assignment, leave the above three fields blank.

3. If the individual is being placed on an ***Alternative Work Schedule***, click on the **LOV** in the **Category** field; select the appropriate work schedule. Once the appropriate work schedule is selected, click **OK.**

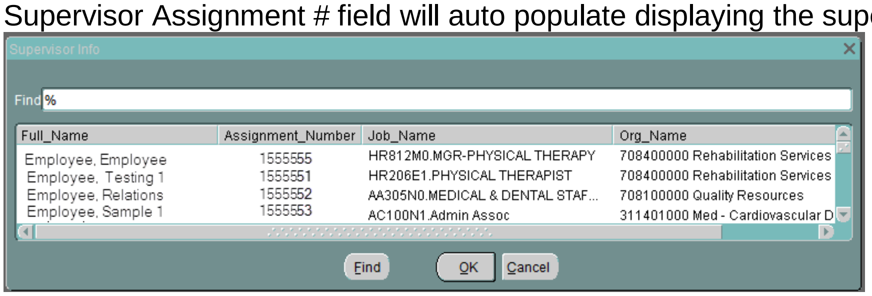


The Location field is available when using a ***Retroactive*** Document Effective Date. The **CATEGORY** field is available when using ***any*** Document Effective after ***January 1, 2009***.

4. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.



5. Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number. Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.



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

7. Click on the **RETURN TO PREVIOUS FORM** to return to the **ACT MAIN FORM**.

Updating Salary Information

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

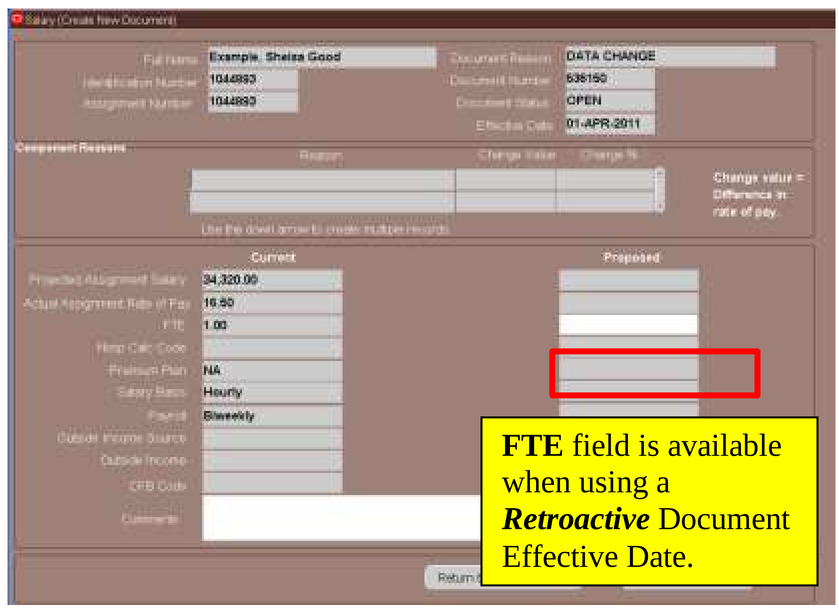
After clicking on the **SALARY** button the following **ERROR** will display

Note: This error is to inform you, **SALARY COMPONENTS** are not available for change when using the **DATA CHANGE** document reasons. Click **OK**.

1. Enter the ***full-time equivalency*** for the employee in the **FTE** field.

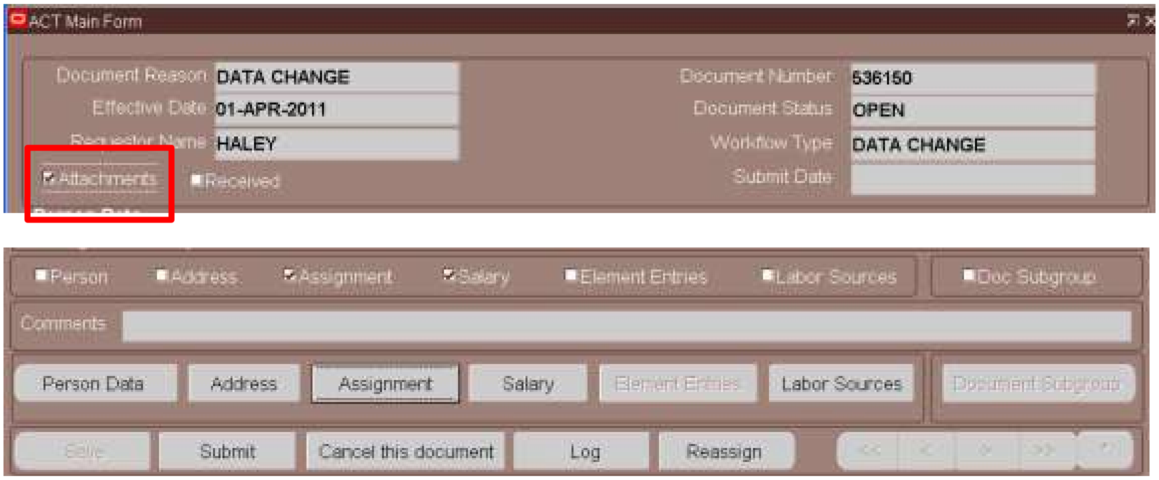
2. Enter comments, if applicable, in the **COMMENTS** field.

3. Click on the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button.



Submitting the Data Change Document

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



2. Click on the **SUBMIT** button

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