Appoint, Change and Terminate (ACT) Documentation
End A Trainee – Part One: Creating an End A Trainee Document

An **END A TRAINEE** Document is used when a Trainee with a 06 (Student) or 20 (Post Doctoral Trainee) Assignment Category terminates their assignment with UAB. This document reason will terminate ALL assignments held by the student or trainee.

UAB HR Officer → HR Transactions → ACT → Find Window

Creating an End A Trainee Document

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

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

   **Note:** After you click on the CREATE NEW DOCUMENT button you might see the window below. Some Trainees may have more than one assignment and could be listed several times. An End A Trainee ACT document can only be submitted on the primary trainee assignment. End A Trainee will terminate all Active assignments.
3. When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.

![ACT Main Form Diagram]

4. Use the **DOCUMENT REASON LOV** to **CHOOSE END A TRAINEE** or type the words *End A Trainee* in the **DOCUMENT REASON** field. Click **OK**.

![Document Reason LOV]

*Updated 17-OCT-2014*
5. Click in the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or type in the desired date. Remember to use the **DD-MM-YY** format.

   ![Image](image.png)

   **Note:** *Attachments are not required for an End A Trainee document.*

6. Click on the **SAVE** button at the bottom of the form. The **ACT MAIN FORM** will display.
Appoint, Change and Terminate (ACT) Documentation
End A Trainee – Part Two: Entering Termination Information

All of the buttons on the ACT Main Form will appear to be open. However, the only forms you will be allowed to edit will be the Person Data form (Termination Tab ONLY) and the Address form. The information on the Termination Tab identifies the Trainee’s projected last day of employment, reason for terminating and rehire eligibility.

1. Click on the PERSON button from the ACT MAIN FORM.

2. Click on the TERMINATION Tab.

3. Click in the PROJECTED LAST DAY OF WORK field, choose the effective date from the Calendar LOV or type in the desired date.

   Note: The Actual Date is pulled from the Document Effective Date. This can be a future date in order to pay the Trainee through a designated pay period. The Projected Last Day of Work will be the Trainee’s actual last day of working at UAB.

4. Click in the LEAVING REASON field; select 400 End Trainee Award from LOV.

5. Click in the REHIRE RECOMMENDATION field.

6. This field will default to Yes. However, if your organization would not rehire this individual, select No from the LOV.

7. Click in the RECOMMENDATION REASON field and explain why your department would not be willing to rehire this individual.

Updated 17-OCT-2014
**Note:** The Rehire Recommendation applies only to your organization. It does not apply to the entire University.

<table>
<thead>
<tr>
<th>Current</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Date</td>
<td>31-MAY-2011</td>
</tr>
<tr>
<td>Projected Last Day</td>
<td>31-MAY-2011</td>
</tr>
<tr>
<td>Leaving Reason</td>
<td>400 End Trainee Award</td>
</tr>
<tr>
<td>Rehire Recommendation</td>
<td>Yes</td>
</tr>
<tr>
<td>Recommendation Reason</td>
<td></td>
</tr>
</tbody>
</table>

8. Click the **SAVE** button; Click **RETURN TO PREVIOUS FORM** to return to the **ACT MAIN FORM**.
Appoint, Change and Terminate (ACT) Documentation
End A Trainee – Part Four: Submitting a End A Trainee Document

The Address button only needs to be completed if the Trainee’s post termination address is different from what currently shows in the Administrative Systems. It is critical that the correct address and phone information be entered for post-employment communications. Tax and benefit information will need to be forwarded to the correct address.

1. If the address and/or phone information is changing, click the ADDRESS button at the bottom of the ACT MAIN FORM.

2. To change the Trainee’s home information, select HOME from the LOV in the ADDRESS TYPE field.

3. Click in the ADDRESS LINE1 field; enter the Trainee’s street address. There are two more address lines available, if needed.

4. In the CITY field, click on the LOV, the LOV brings up a FIND field. In the FIND field type the name of the city in which the Trainee lives, and click OK. A listing of City, State, Zip Start, Zip End and County will appear.

5. Highlight the correct zip code range for the city and county in which the Trainee lives. Click OK. This will populate the CITY AND STATE field.

6. Click in the ZIP CODE field, type the correct Zip Code. Click SAVE.

Note: If the Trainee 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.
7. If the Trainee’s home phone number is changing, click once in the Type field of the PHONES region.

8. Click on the home phone number in the PHONE NUMBER section. Enter the Trainee’s home phone number without the dashes. This information must be entered in ten digits.

9. Click on the home date in the DATE FROM section. Enter the effective date of the termination document.

10. Enter comments, if applicable, in the COMMENTS field at the bottom of this form. Comments entered here will appear on the ACT MAIN FORM.

11. Click on the SAVE button.

12. Click on the RETURN TO PREVIOUS FORM button to return to the ACT MAIN FORM.
The HR Officer verifies that all information is correct and the document is ready to be submitted. The HR Officer submits the Termination document for approval. At that point, the document status changes from Open to Ready and enters the approval path.

1. Before submitting the document make certain all information is correct. Click the **Submit** button.

2. Once the document is submitted the following window appears.

   ![Decision Window](image)
   
   Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.
   
   ![Decision Options](image)
   
   **No**  **Yes**

3. Click No to continue since Attachments are not required for an End A Trainee Document.

4. The **Document Status** changes to **Ready**.

![Document Status](image)

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

10. Once the **Termination** document is submitted, and the document status changes to **Ready**, the document has entered the Approval Path. The **Document Status** will change throughout the levels of Approval. Once the document has been approved by all levels of Administration, the **Document Status** will change to COMPLETE.

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