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

An End A Volunteer Document is used when an individual with a 60 (Volunteer) Assignment Category terminates their assignment with UAB. This document reason will terminate the Volunteer from the Administrative Systems.

UAB HR Officer → HR Transactions → ACT → Find Window

Creating an End A Volunteer Document

1. Use the Find Window to locate the Volunteer.

2. Click on the Create New Document button.

3. When the ACT Main Form opens, click once in the Document Reason Field.
4. Use the **DOCUMENT REASON LOV** to choose **END A VOLUNTEER** or type the words **End A Volunteer** in the **DOCUMENT REASON** field. Click **OK**.

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-MMM-YY** format.

6. Click **ATTACHMENTS** box if attachments will be accompanying this End A Volunteer document. For a list of Attachments to accompany an End A Volunteer document, [click here](#).

7. Click on the **SAVE** button at the bottom of the form.
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End A Volunteer – 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 Volunteer’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. The Projected Last Day of Work will be the Volunteer’s actual last day of working at UAB.

4. Click in the LEAVING REASON field; select the appropriate reason from the 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.

   **Note:** The Rehire Recommendation applies only to your organization. It does not apply to the entire University.
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 Volunteer – Part Three: Changing Address Information

The Address button only needs to be completed if the Volunteer’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 Volunteer’s home information, select HOME from the LOV in the ADDRESS TYPE field.

3. Click in the ADDRESS LINE1 field; enter the Volunteer’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 Volunteer 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 Volunteer 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 Volunteer 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,
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End A Volunteer – Part Three: Changing Address Information

**Street Address on Address Line 2 and the building and room number on Address Line 3.**

7. If the Volunteer's home phone number is changing, click once in the Type field of the PHONES region.

<table>
<thead>
<tr>
<th>Phone</th>
<th>Type</th>
<th>Phone Number</th>
<th>Date From</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Campus Primary</td>
<td>(205) 934-4531</td>
<td>01-MAR-2005</td>
</tr>
<tr>
<td></td>
<td>Home</td>
<td>(205) 978 0628</td>
<td>01-MAR-2005</td>
</tr>
</tbody>
</table>

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

<table>
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<tr>
<td></td>
<td>Home</td>
<td>(205) 666 9999</td>
<td>25-OCT-2005</td>
</tr>
</tbody>
</table>

9. Click on the home date in the DATE FROM section. Enter the effective date of the 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.
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End A Volunteer - Part Four: Submitting A End A Volunteer Document

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]
   
   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.

   - **No**
   - **Yes**

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

4. The **DOCUMENT STATUS** changes to READY.

![Main Form]

**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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