

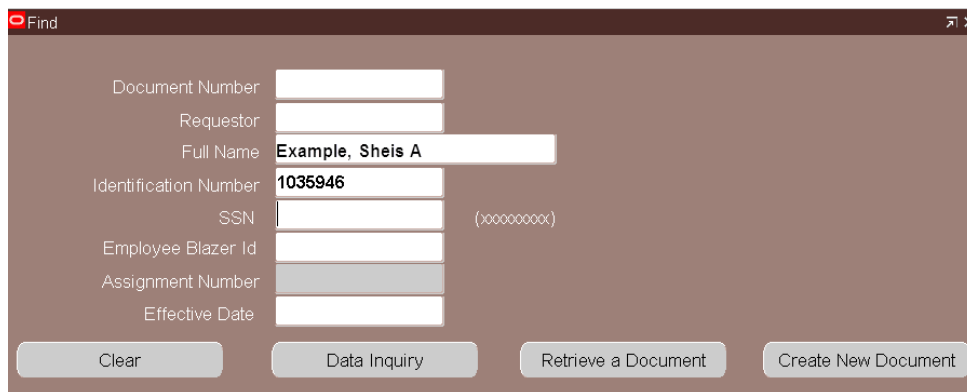
Appoint, Change and Terminate (ACT) Documentation End A Volunteer – Part One: Creating End A Volunteer Document

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.



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

Document Number	
Requestor	
Full Name	Example, Sheis A
Identification Number	1035946
SSN	(xxxxxxxx)
Employee Blazer Id	
Assignment Number	
Effective Date	

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

2. Click on the **CREATE NEW DOCUMENT** button.
3. When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.



The screenshot shows the 'ACT Main Form' with the following sections and fields:

Document Reason (dropdown menu) | **Document Number** (text field)

Effective Date (text field) | **Document Status** (text field)

Requestor Name (text field, value: HALEY) | **Workflow Type** (text field)

Attachments | Received | **Submit Date** (text field)

Person Data

Name		Gender	
Identification Number		Ethnic Origin	
SSN		Total Active Assignments	
Service Date		Projected Total Annual Salary	
Date of Birth		<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	
Assignment Category		Organization	
Job		Position	
FTE		Primary	
Projected Annual Salary		Payroll	

Person | Address | Assignment | Salary | Element Entries | Labor Sources

Comments (text area)

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources

Buttons: Save, Submit, Cancel this document, Log, Reassign

Appoint, Change and Terminate (ACT) Documentation

End A Volunteer – Part One: Creating End A Volunteer Document

- Use the **DOCUMENT REASON** LOV to **CHOOSE END A VOLUNTEER** or type the words **End A Volunteer** in the **DOCUMENT REASON** field. Click **OK**.

Doc_Reason	Doc_Type
ADDITIONAL ASSIGNMENT	HIRE
BUDGET	BUDGET
CHANGE OF ASSIGNMENT CATEGORY	CHANGE
DATA CHANGE	DATA CHANGE
EDUCATION LEAVE WITH PAY	LEAVES
EDUCATION LEAVE WITHOUT PAY	LEAVES
END A TRAINEE	TERMINATION
END A VOLUNTEER	TERMINATION
END ASSIGNMENT	CHANGE
EQUITY INCREASE	CHANGE
FMLA WITH PAY	LEAVES
FMLA WITHOUT PAY	LEAVES
FUNDING SOURCE CHANGE	COSTING CHANGE

- 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.

ACT Main Form

Document Reason: END A VOLUNTEER

Effective Date: 31-MAR-2011

Requestor Name: HALEY

Attachments Received

- 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](#).

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

ACT Main Form

Document Reason: END A VOLUNTEER Document Number: 536189

Effective Date: 31-MAR-2011 Document Status: OPEN

Requestor Name: HALEY Workflow Type: TERMINATION

Attachments Received

Person Data

Name: Example, Sheis A Gender: Female

Identification Number: 1035946 Ethnic Origin: Black or African American

SSN: Total Active Assignments: 1

Service Date: 13-APR-2009 Total Projected Annual Salary: .00

Date of Birth: 21-SEP-1969 Prior UAB Service

Assignment Data

Assignment Number: 1035946-2 Assignment Status: Active Assignment

Assignment Category: 60 Volunteer Organization: 352001000 Nutr Sci - Clin Ni

Job: Q014.Volunteer Position: 352001000.85001.051201

FTE: Primary: Y

Projected Assignment Salary: .00 Payroll:

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments:

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

Save Submit Cancel this document Log Reassign << < > >>

Appoint, Change and Terminate (ACT) Documentation 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.

The screenshot shows the ACT Termination form with the 'Termination' tab selected. The form is divided into 'Current' and 'Proposed' sections. The 'Proposed' section has a yellow highlight on the 'Projected Last Day' field, which contains the date '31-MAR-2011'. An arrow points from this field to step 3 of the instructions below. The 'Rehire Recommendation' field is set to 'Yes'. The 'Termination' tab is circled in red.

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.*

Appoint, Change and Terminate (ACT) Documentation End A Volunteer – Part Two: Entering Termination Information

	Current	Proposed
Actual Date	<input type="text"/>	31-MAR-2011
Projected Last Day	<input type="text"/>	31-MAR-2011
Leaving Reason	<input type="text"/>	101 Resigned - Voluntary
Rehire Recommendation	Yes	Yes
Recommendation Reason	<input type="text"/>	<input type="text"/>

Comments

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.

The screenshot shows a web form with three main sections: Address, Phones, and Comments. The Address section is split into 'Current' and 'Proposed' columns. The 'Current' column has fields for Address Type (Home), Address Line1 (401- A Coliseum Blvd), Address Line2, Address Line3, City (Montgomery), State (AL), and Zip Code (36109). The 'Proposed' column has corresponding empty fields. Below the address fields are instructions: 'Use the down arrow to view multiple records.' and 'Use the down arrow to create multiple records.' The Phones section has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. It contains two rows: 'Campus Primary' with phone number '(205) 934-3006' and date '06-JAN-2006', and 'Home' with phone number '(334) 271-1618' and date '06-JAN-2006'. Below the table is the instruction 'Use the down arrow to create multiple records.' The Comments section has an 'International Address' checkbox and a text area. At the bottom are 'Return to Previous Form' and 'Save' buttons.

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,*

Appoint, Change and Terminate (ACT) Documentation End A Volunteer – Part Three: Changing Address Information

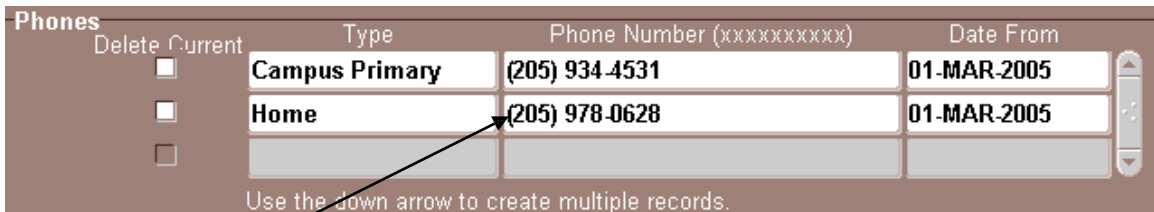
Street Address on Address Line 2 and the building and room number on Address Line 3.



International Address

Comments

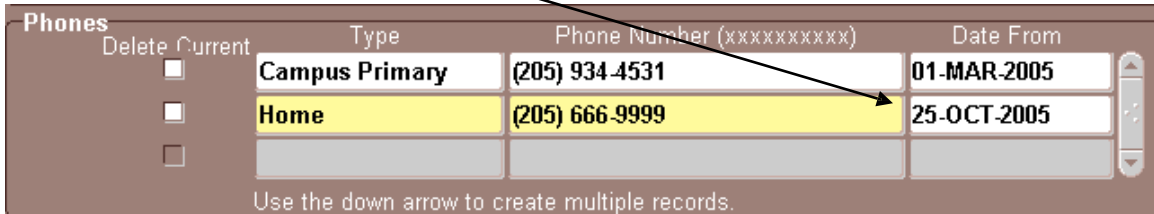
7. If the Volunteer's home phone number is changing, click once in the Type field of the **PHONES** region.



Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 978-0628	01-MAR-2005
<input type="checkbox"/>			

Use the down arrow to create multiple records.

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



Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-4531	01-MAR-2005
<input type="checkbox"/>	Home	(205) 666-9999	25-OCT-2005
<input type="checkbox"/>			

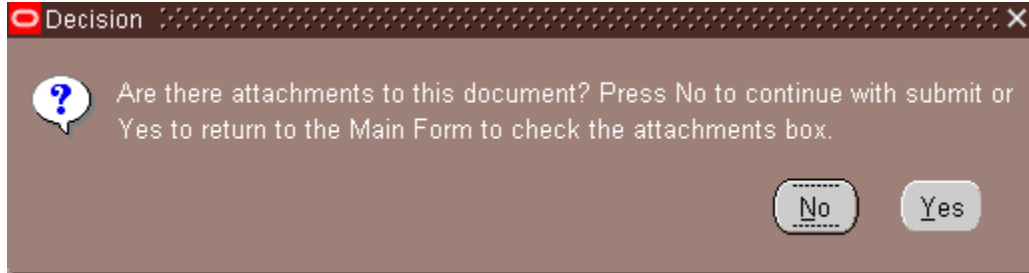
Use the down arrow to create multiple records.

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**.

Appoint, Change and Terminate (ACT) Documentation 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.



3. Click **No** to continue since Attachments are not required for an End A Volunteer Document.
4. The **DOCUMENT STATUS** changes to **READY**.



A screenshot of the 'ACT Main Form' window. The form fields are as follows:

Document Reason	END A VOLUNTEER	Document Number	536189
Effective Date	31-MAR-2011	Document Status	READY
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	23-MAR-2011 16:28:58

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**.

[RETURN TO TOP](#)