

Appoint, Change and Terminate (ACT) Documentation Termination Document

The Termination Document is used to **TERMINATE** an employee's "**primary**" assignment from the University. This document reason will terminate **ALL ASSIGNMENTS** held by the employee.

When terminating an employees' primary assignment and they **have more than one active assignment** in the Oracle Administrative Systems:

- If the primary assignment is a **benefit eligible** assignment, proceed to create a termination document. **** All assignments must be terminated before Payroll can issue an employees' terminal vacation pay.**
- If the primary assignment is a **non-benefited** assignment, contact [Records Administration](#) for assistance in "**switching**" the primary assignment. Once the primary assignment has been switched, you will need to end the assignment using an **End Assignment** document reason. [Click here](#) for instructions on how to process an End Assignment ACT document.

To determine whether an assignment is benefit eligible or non-benefited, [click here](#). (You and UAB Section 2.2)

UAB HR OFFICER → HR Transactions → ACT → Find Window

Creating a Termination Document

1. Use the **FIND** Window to locate the employee, by using either the name of the employee, employee identification number or the employee's social security number.



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

Appoint, Change and Terminate (ACT) Documentation Termination -- Part One: Creating a Termination Document

Note: After you click on the CREATE NEW DOCUMENT button you might see the window below. Some employees may have more than one assignment and could be listed several times. Make sure you choose the correct assignment.

Before submitting a termination document on an employee with multiple assignments, the HR Officer should notify the department(s) in which all additional assignments are affiliated. If an employee's additional assignment is to continue after the termination date, a **Rehire Document** must be completed by the appropriate department to re-establish the assignment. Payroll cannot issue pay for time worked on the additional assignment until the Rehire Document has reached a "COMPLETE" status.

The screenshot shows a window titled "Assignment" with a search field containing "1003666%". Below the search field is a table with the following data:

Assignment_Number	Position_Name	Org_Name	Assg_Status
1003666	311100000.04601.031001	311100000 Anesthesiology Cha...	Active Assignment
1003666-2	353001000.80001.050101	353001000 Nurse Anesthesia P...	Active Assignment

Buttons at the bottom include "Find", "OK", and "Cancel".

3. The **ACT MAIN FORM** opens; click once in the **DOCUMENT REASON** field.

The screenshot shows the "ACT Main Form" with several input fields. The "Document Reason" field is highlighted with a cursor. Other fields include "Effective Date", "Requestor Name" (HALEY), "Attachments", "Received", "Document Number", "Document Status", "Workflow Type", and "Submit Date".

4. Using the **DOCUMENT REASON LOV**, choose **Terminate Employee**; Click **OK**.

The screenshot shows a "Document Reason" LOV window with a search field containing "%". The list below shows various document reasons and types. The "TERMINATE EMPLOYEE" option is highlighted in blue.

Doc_Reason	Doc_Type
PERSONAL LEAVE WITHOUT PAY	LEAVES
PROBATIONARY INCREASE	CHANGE
PROMOTION SAME DEPARTMENT	CHANGE
RECLASSIFICATION	CHANGE
RECURRING	ELEMENTS
REFUND	ELEMENTS
REHIRE	HIRE
RETURN FROM LEAVE	LEAVES
SABBATICAL FULL PAY	LEAVES
SABBATICAL HALF PAY	LEAVES
SALARY SCHEDULE ADJUSTMENT	CHANGE
TERMINATE EMPLOYEE	TERMINATION
TRANSFER LATERAL/DIFFERENT DEPT	CHANGE
TRANSFER LATERAL/SAME DEPT	CHANGE
TRANSFER WITH PROMOTION	CHANGE

Buttons at the bottom include "Find", "OK", and "Cancel".

Appoint, Change and Terminate (ACT) Documentation Termination -- Part One: Creating a Termination Document

- Click in the **EFFECTIVE DATE** field. Enter the **Effective Date** of the termination in the **EFFECTIVE DATE** field. Use the calendar **LOV** or type in the desired date using the **DD-MMM-YY** Format.

Note: The DOCUMENT EFFECTIVE DATE is the last day the employee is to receive pay from UAB. This date can not be changed once you have submitted the document. verify you have entered the correct effective date.

Document Reason	TERMINATE EMPLOYEE	Document Number	
Effective Date	31-MAR-2011	Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

- Click **ATTACHMENTS** box to indicate attachments will be accompanying this termination document. For a list of Attachments to accompany a Termination document, [click here](#).
- Click on the **SAVE** button at the bottom of the form.

Note: Once you press the SAVE button, you WILL NOT be able to change the DOCUMENT REASON or EFFECTIVE DATE. You will have to cancel the document and start over.

Document Reason	TERMINATE EMPLOYEE	Document Number	536180
Effective Date	31-MAR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data	
Name	Test, Gladtohea J
Gender	Female
Identification Number	1012732
Ethnic Origin	White
SSN	
Total Active Assignments	1
Service Date	29-NOV-2002
Total Projected Annual Salary	xx.xxx.xx
Date of Birth	03-SEP-1970
	<input type="checkbox"/> Prior UAB Service

Assignment Data	
Assignment Number	1012732
Assignment Status	Active Assignment
Assignment Category	01 Regular FT
Organization	350000000 SHP Dean's Offic
Job	AC100N1.Admin Assoc
Position	350000000.00901.031001
FTE	1
Primary	Y
Projected Assignment Salary	xx.xxx.xx
Payroll	Biweekly

Person
 Address
 Assignment
 Salary
 Element Entries
 Labor Sources
 Doc Subgroup

Comments

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Three: Changing Address 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 employee's projected last day of employment, reason for terminating and rehire eligibility.

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

The screenshot shows the top navigation bar of the ACT Main Form. It features a series of tabs: Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below these tabs is a 'Comments' text area. A second row of buttons includes 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. The bottom row contains action buttons: 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows (<<, <, >, >>).

2. Click on the **TERMINATION** Tab.

The screenshot shows the 'Termination' tab selected in the ACT Main Form. The 'Personal' tab is also visible. The 'Termination' tab contains two columns: 'Current' and 'Proposed'. The 'Current' column has fields for SSN, Last Name (Test), First Name (Gladtoeba), Middle Names (J), Suffix, Title (Ms.), Date Of Birth (03-SEP-1970), and Gender (FEMALE). The 'Proposed' column has empty fields for the same information. Below the form is a 'Comments' text area.

3. Click in the **PROJECTED LAST DAY OF WORK** field, choose the effective date from the Calendar LOV or type in **the employee's actual last day of work**.

The screenshot shows the 'Termination' tab with the 'Proposed' column selected. The 'Actual Date' field is empty, and the 'Projected Last Day' field is highlighted in yellow, showing a date of 31-MAR-2011. The 'Leaving Reason' field is also highlighted in yellow. The 'Rehire Recommendation' field is set to 'Yes'. The 'Recommendation Reason' field is empty. Below the form is a 'Comments' text area and buttons for 'Address', 'Return to Previous Form', and 'Save'.

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

Note: The Projected Last Day of Work will be the last day the employee will physically be at work.

Note: Before submitting an INVOLUNTARY termination, contact HR Relations. HR Relations will evaluate the circumstances and recommend the appropriate Leaving Reason to select.

4. Click in the **REHIRE RECOMMENDATION** field.
5. This field will default to **Yes**. However, if your organization would not rehire this individual, select **No** from the LOV.
6. 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.

7. Click the **SAVE** button. Click on the Return to Previous Form button to return to the ACT Main Form or click on the Address button update the employee's home address.

	Current	Proposed
Actual Date		31-MAR-2011
Projected Last Day		31-MAR-2011
Leaving Reason		101 Resigned - Voluntary
Rehire Recommendation	Yes	Yes
Recommendation Reason		

Comments

Address Return to Previous Form Save

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

The Address button is only available when using a current document effective date and needs to be completed if the employee's post termination address is different from what currently shows in the Administrative Systems.

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 employee's home information, select **HOME** from the LOV in the **ADDRESS TYPE** field.

The screenshot shows the 'Address' and 'Phones' sections of the ACT system form. The 'Address' section has two columns: 'Current' and 'Proposed'. Under 'Current', the 'Address Type' is 'Home', 'Address Line 1' is '2501 Jasper Way', 'City' is 'Hoover', and 'State' is 'AL'. Under 'Proposed', the 'Address Type' is also 'Home'. The 'Phones' section has a table with columns: 'Delete', 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. It lists three phone numbers: 'Work Fax' (205) 975-8121, 'Home' (205) 999-5555, and 'Campus Primary' (205) 975-8034, all with a 'Date From' of 23-DEC-2009. There is also an 'International Address' checkbox and a 'Comments' field. At the bottom are 'Return to Previous Form' and 'Save' buttons.

3. Click in the **ADDRESS LINE1** field; enter *the employee'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 employee lives*, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

The screenshot shows a 'Find' window with a search bar containing 'Birmingham%'. Below the search bar is a table with columns: 'City', 'State', 'Zip Start', 'Zip End', and 'County'. The table lists various Birmingham locations in Alabama with their respective zip codes and counties. The second row, 'Birmingham AL 35200 35299 Jefferson', is highlighted in blue. At the bottom are 'Find', 'OK', and 'Cancel' buttons.

City	State	Zip Start	Zip End	County
Birmingham	AL	35020	35020	Jefferson
Birmingham	AL	35200	35299	Jefferson
Birmingham	AL	35201	35226	Shelby
Birmingham	AL	35228	35238	Shelby
Birmingham	AL	35240	35240	Shelby
Birmingham	AL	35242	35246	Shelby
Birmingham	AL	35249	35249	Shelby
Birmingham	AL	35253	35255	Shelby
Birmingham	AL	35259	35261	Shelby
Birmingham	AL	35263	35263	Shelby
Birmingham	AL	35266	35266	Shelby
Birmingham	AL	35277	35283	Shelby

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

5. 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.
6. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

Address

	Current	End Date	Current		Proposed
Address Type	Home	<input type="checkbox"/>			Home
Address Line1	2501 Jasper Way				1792 Happy Way
Address Line2					
Address Line3					
City	Hoover				Columbus
State	AL				OH
Zip Code	35226	-			73192

Use the down arrow to view multiple records. Use the down arrow to create multiple records.

Phones

	Delete	Current	Type	Phone Number (xxxxxxxxxx)	Date From
	<input type="checkbox"/>		Work Fax	(205) 975-8121	23-DEC-2009
	<input type="checkbox"/>		Home	(205) 999-5555	23-DEC-2009
	<input type="checkbox"/>		Campus Primary	(205) 975-8034	23-DEC-2009

Use the down arrow to create multiple records.

International Address

Comments

Return to Previous Form
Save

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.

International Address

Comments

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

Phones

	Delete	Current	Type	Phone Number (xxxxxxxxxx)	Date From
	<input type="checkbox"/>		Campus Primary	(205) 934-0005	05-SEP-2005
	<input type="checkbox"/>		Home	(205) 698-8978	05-SEP-2005

Use the down arrow to create multiple records.

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

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Three: Changing Address Information

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

Delete Current	Type	Phone Number (xxxxxxxxxx)	Date From
<input type="checkbox"/>	Campus Primary	(205) 934-0005	05-SEP-2005
<input type="checkbox"/>	Home	(205) 698-8978	05-SEP-2005
<input type="checkbox"/>			

Use the down arrow to create multiple records.

- Enter comments, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.
- Click on the **SAVE** button.
- Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Four: Submitting a Termination Document

The HR Officer verifies that all information is provided and all attachments are 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. On the **ACT MAIN FORM**, verify a checkmark has been inserted in the checkbox next to **PERSON** and **ADDRESS** if address correction was made.

The screenshot shows the 'ACT Main Form' window with the following data:

Document Reason	TERMINATE EMPLOYEE	Document Number	536180
Effective Date	31-MAR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Test, Gladtoeba J	Gender	Female
Identification Number	1012732	Ethnic Origin	White
SSN	852-36-9741	Total Active Assignments	1
Service Date	29-NOV-2002	Total Projected Annual Salary	53,268.80
Date of Birth	03-SEP-1970	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1012732	Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	350000000 SHP Dean's Office
Job	AC100N1.Admin Assoc	Position	350000000.00901.031001
FTE	1	Primary	Y
Projected Assignment Salary	53,268.80	Payroll	Biweekly

Navigation: Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments: [Empty text box]

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

Footer: Save, Submit, Cancel this document, Log, Reassign, <<, <, >, >>, *

Note: A check will be inserted when **REQUIRED FIELDS** on required screens and tabs have been completed.

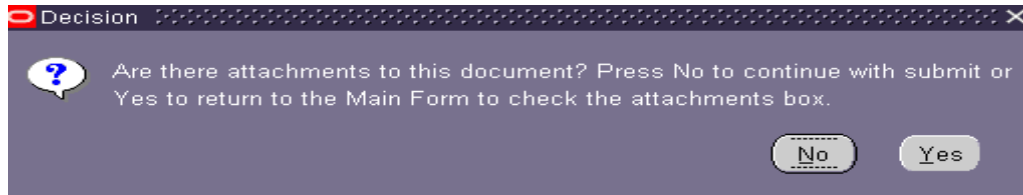
2. On the **ACT MAIN FORM** Window, verify you have a check in the **ATTACHMENTS** box; assemble all attachments to be submitted with Termination document.

The close-up screenshot shows the top section of the 'ACT Main Form' window:

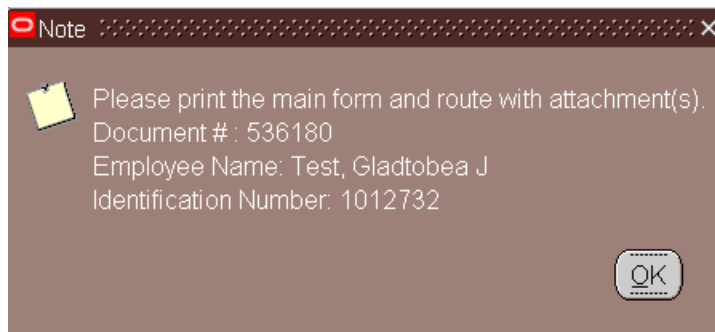
Document Reason	TERMINATE EMPLOYEE
Effective Date	31-MAR-2011
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

Appoint, Change and Terminate (ACT) Documentation Termination -- Part Four: Submitting a Termination Document

3. Before submitting the document make certain all information is correct. ***You will not be able to correct information within the document after submitting.***
4. Click the **SUBMIT** button.
5. If you ***did not*** check the **ATTACHMENTS** checkbox, you will see the following message.



6. Click **YES** to return to the **ACT MAIN FORM** and check the **ATTACHMENTS** box and resubmit.
7. If you ***did*** check the **ATTACHMENTS** checkbox, you will see the following message.



8. Click **OK** and then print the **ACT MAIN FORM** and attach to the front of attachments that are going to be sent to Central HR.
9. The **DOCUMENT STATUS** changes to **READY**.

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

[RETURN TO TOP](#)