Appoint, Change and Terminate (ACT) Documentation
New Hire ACT Document

The ***New Hire*** ACT document reason is used to **appoint** ***new employees*** who have ***never*** been affiliated with UAB in an active employee, trainee or volunteer status in the past.

The information entered on the ***New Hire*** document provides the data needed for the employee to be paid. It also creates the official personnel record for that individual. While it may seem to be a rather lengthy process, much of the data is used for reporting throughout the University and to external agencies. Therefore, providing as much data as possible and ensuring its accuracy is important. It is recommended before starting this procedure, you have all of the relevant information in front of you, and that you complete it in sequential order.

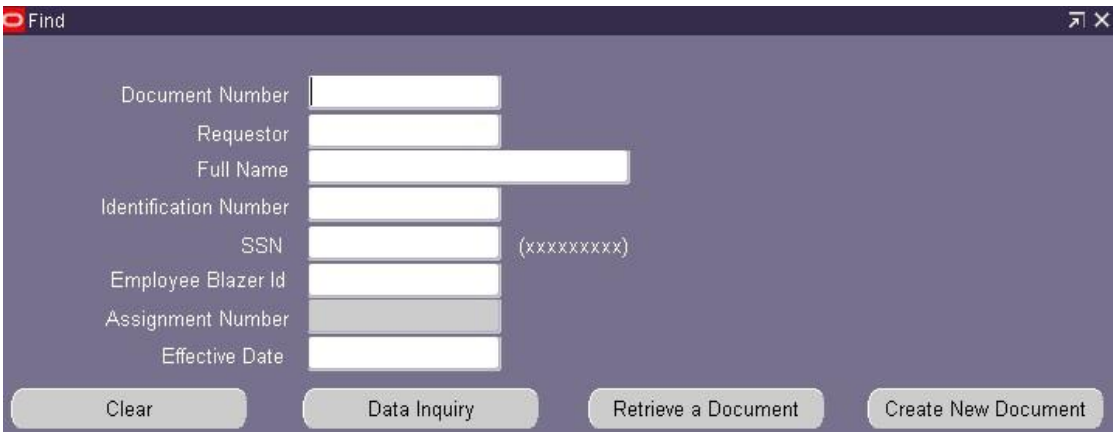
Instructions for completing each form on the New Hire Document can be accessed by clicking on the section listed below or scrolling through the document.

Updated 22-FEB-2016

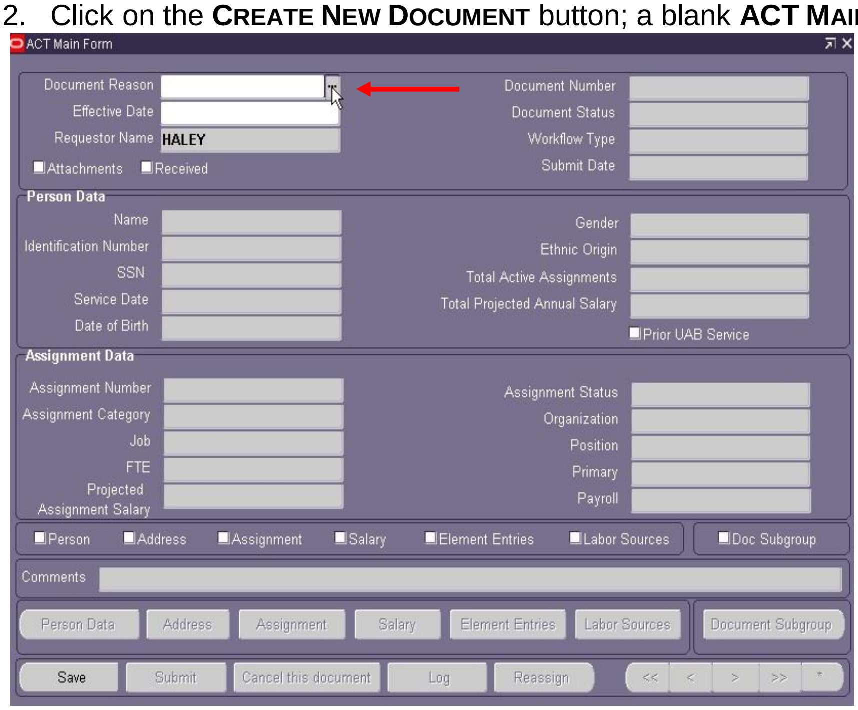
UAB HR Officer→ HR Transactions → ACT → Find Window

Creating a New Hire ACT Document

1. Selecting **ACT** opens the **ACT FIND** window.

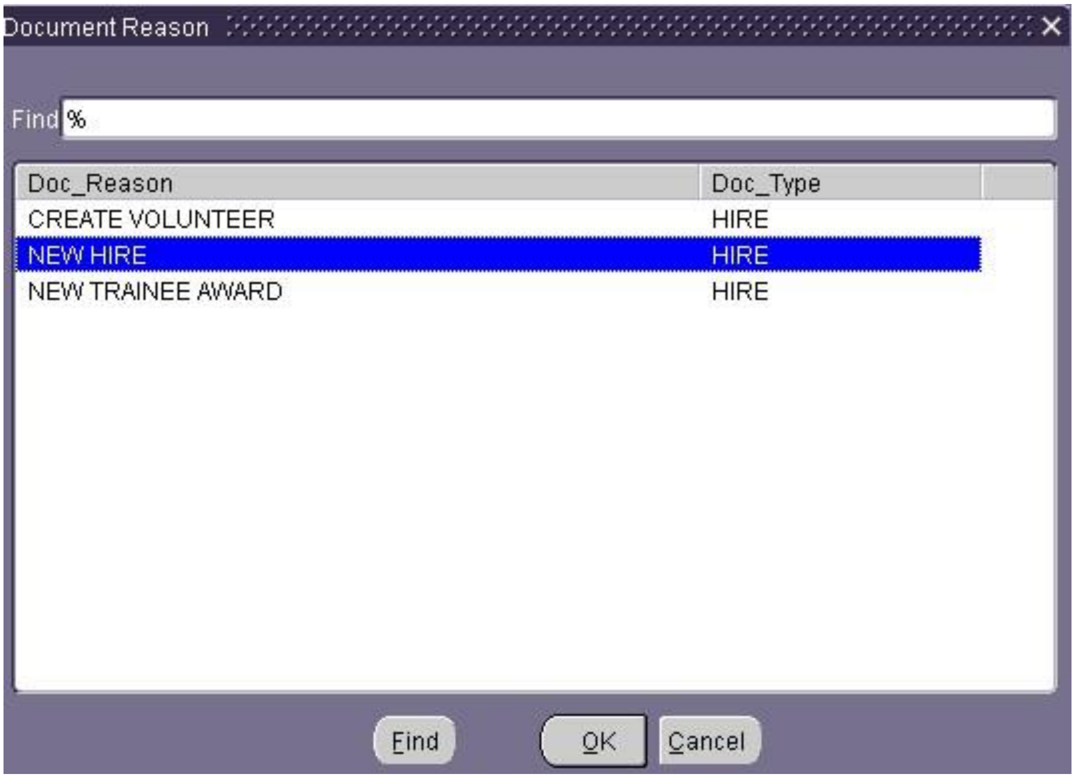


2. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.



3. Click on the **LOV** box in the **DOCUMENT REASON** field.

4. The **Document Reason** window displays. Select **New Hire** and click ***OK***.



5. Enter the ***Effective Date*** in the **Effective Date** field. ***Note: This date cannot be changed once you have saved the document.*** Use the calendar **LOV** or type in the desired date using the ***DD-MMM-YY*** Format.

6. Click in the **Attachments** checkbox; a check mark now appears which indicates attachments ***will be*** accompanying the New Hire document. For a list of **Attachment**s to accompany a **New Hire** document, ***click here***.

7. Click **SAVE** at the bottom of the form. The system will assign a **Document Number** and the **DOCUMENT STATUS** is now ***OPEN.***

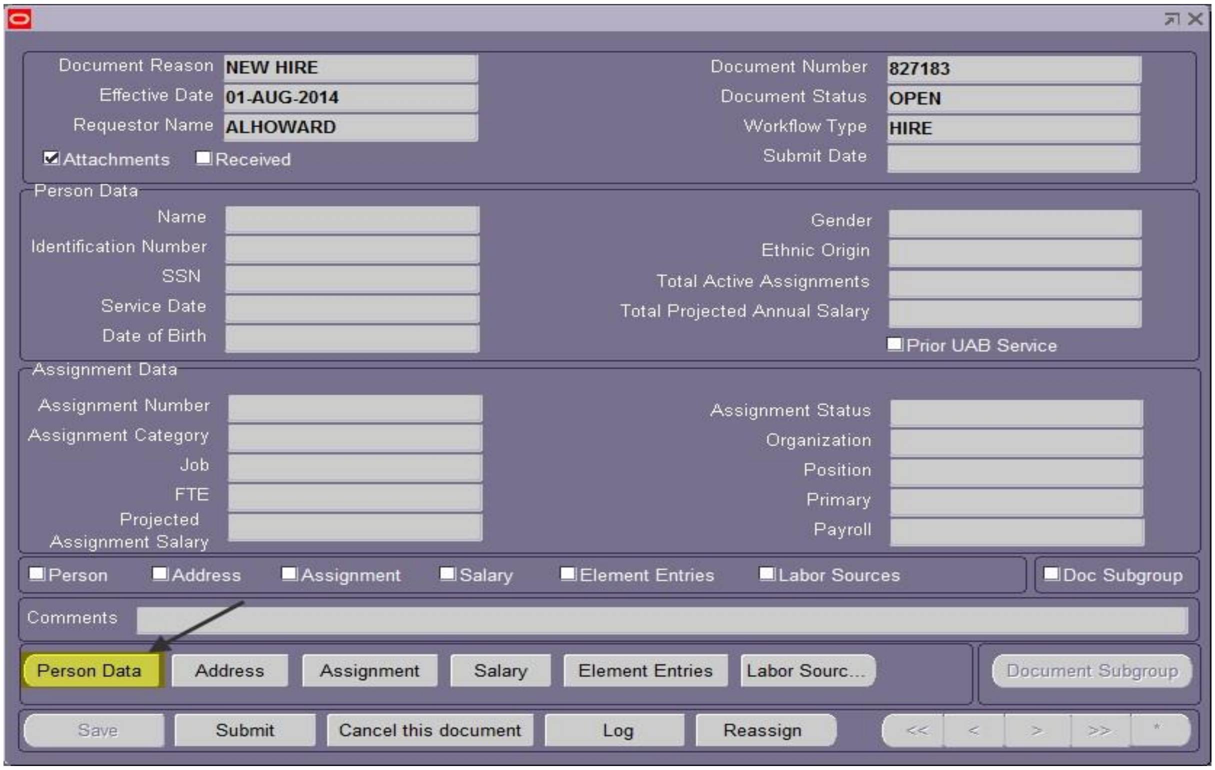
   Note: **The DOCUMENT REASON and EFFECTIVE DATE fields are not updatable after clicking on SAVE. If an incorrect DOCUMENT REASON or EFFECTIVE DATE has been entered, the document must be cancelled and a new document created using the correct document reason and/or effective date.**

   ***BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE NEW HIRE DOCUMENT*. You will not be able to locate the new employee by name or social security number until the New Hire document has entered COMPLETE status.**

The **PERSON DATA** forms contain demographic information and other employee data that is grouped into five sub forms and two buttons on the ACT form. The sub forms to be completed are **PERSONAL**, **EMPLOYMENT**, **DIRECTORY**, and **LICENSE**; when necessary, the **TERMINATION** form. The two buttons contain Address and Schools and Colleges data.

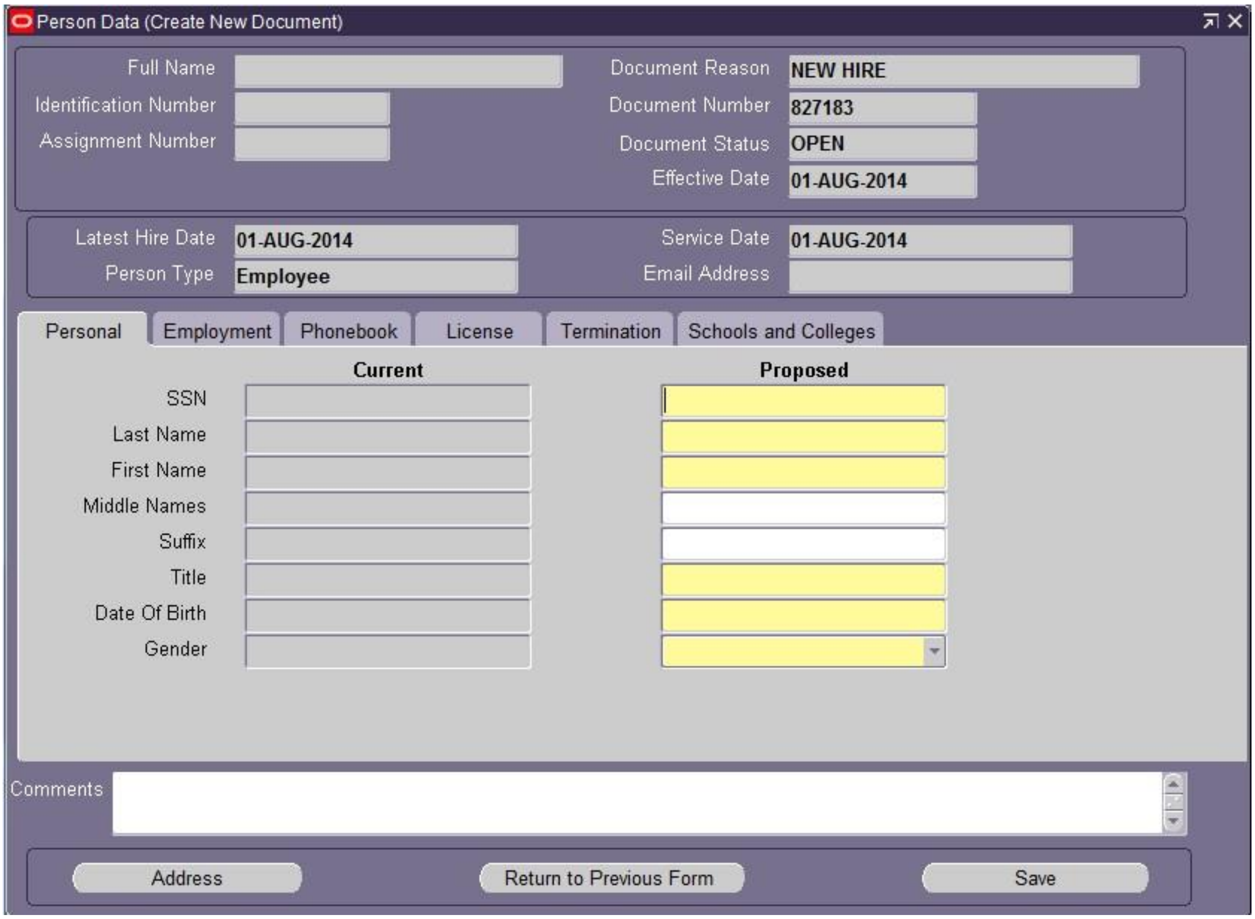
Entering Person Data Information

Click on the ***PERSON DATA*** tab at the bottom of the ACT Main Form.



Entering Personal Information

1. The **PERSON DATA FORM** opens. **Required fields are yellow and must be completed before saving the form.**



2. Enter the ***employee's Social Security number/ITIN/Temporary Identification number*** in the **SSN** field; ***do not enter dashes***. Press **TAB** or click in the next field.

Note: If you receive the following NOTE after entering the employee's social security number, the employee's personal data already exists in the Administrative Systems. A Rehire document will have to be completed on this employee. For instructions on completing a ***Rehire*** Document ***click here***.

3. Enter the ***employee's last name*** exactly as it should appear in the **LAST NAME** field.
   Remember this is the employee's official UAB electronic document. The FIRST letters of all names are to be capitalized; REMAINING letters are to be lower case. Press **TAB** or click in the next field.

4. Enter the ***employee's first name*** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.

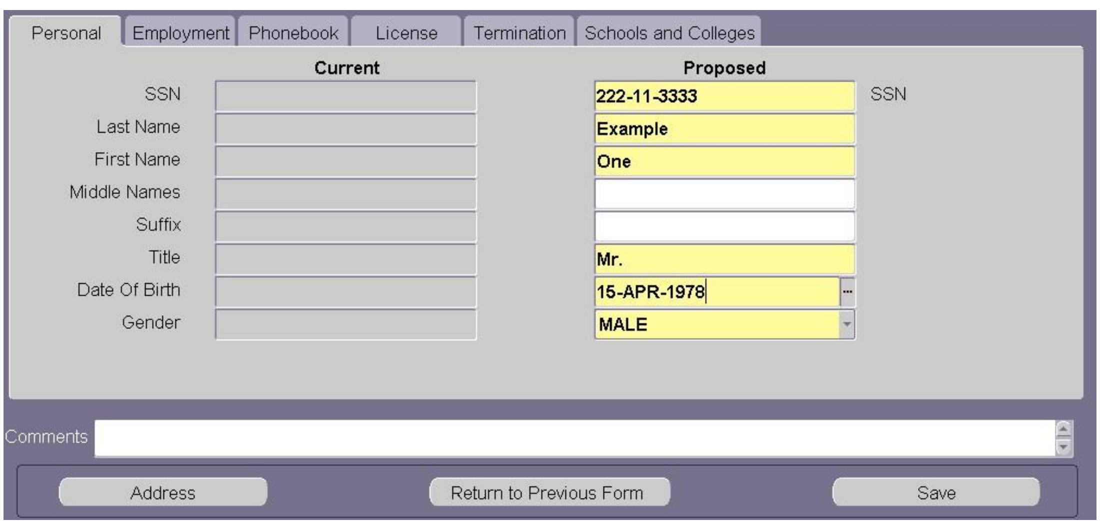
5. Enter the ***employee's middle name***, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.

6. Enter the ***employee's suffix***, in the **SUFFIX** field if applicable. ***Example: Sr., Jr., III, etc.*** Press **TAB** or click in the next field.

7. Click once in the **TITLE** (Mr. Mrs. Miss) field. Choose ***appropriate title*** from LOV or type it directly into the field. ***Once you have selected the title, the GENDER field will automatically populate based on title choice***.

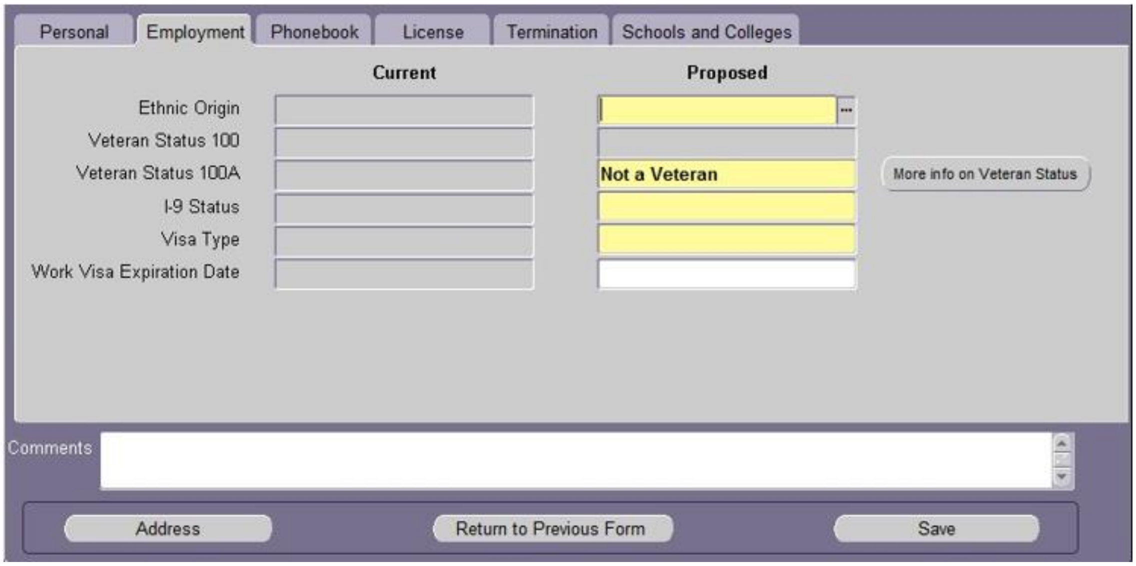
8. Click once in the **DATE OF BIRTH** Field. Enter the ***employee's birth date*** using the ***DD-MMM-YY*** format.

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

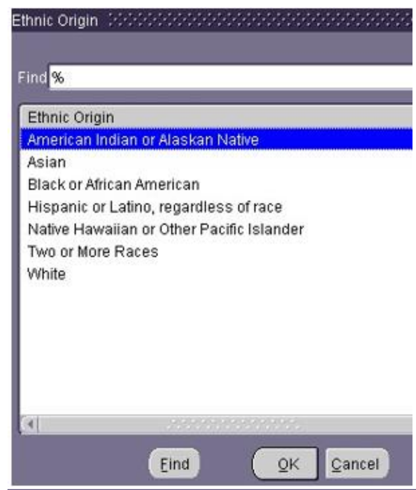


10. Once you click the **SAVE** button, the screen will advance to the **EMPLOYMENT** Tab.

Entering Employment Information

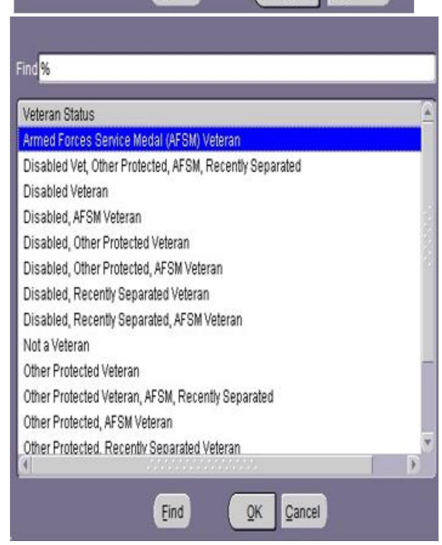


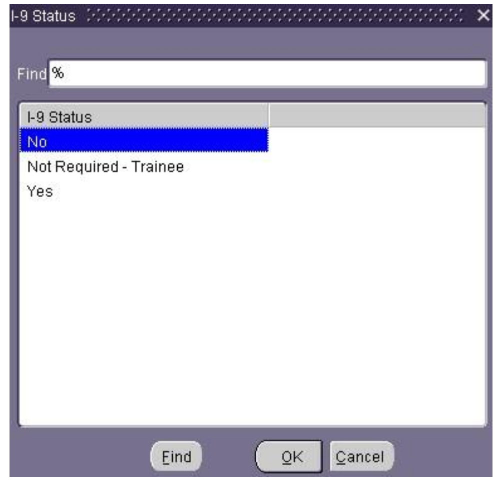
1. In the **ETHNIC ORIGIN** field, click the **LOV** and select the **employee's ethnic origin.** Click **OK**.



Ethnic origin is a required field and must be filled in before you will be allowed to save the document; however, employees do have the ability to update and change this information via the Self Service Application.

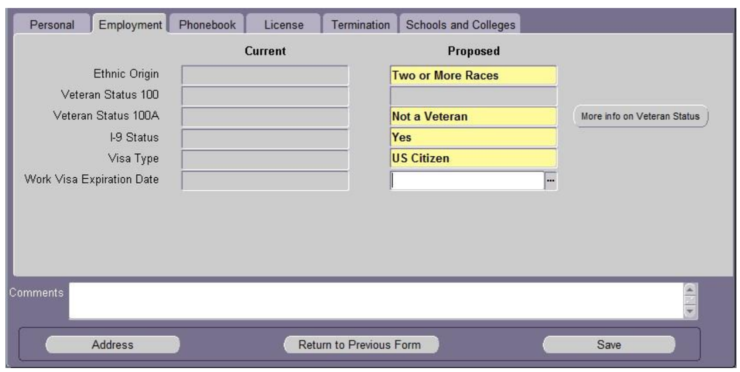
2. Click in the **VETERANS STATUS 100A** field, **Not a Veteran** will automatically default; however, if the employee has presented a completed "**Invitation to Self Identify Form**" click the **LOV** for veteran status options and select the correct veteran status. To see reporting requirements and veteran status definitions click on the "**More info on Veteran Status**" button. Once the appropriate veteran status is selected, click **OK**.





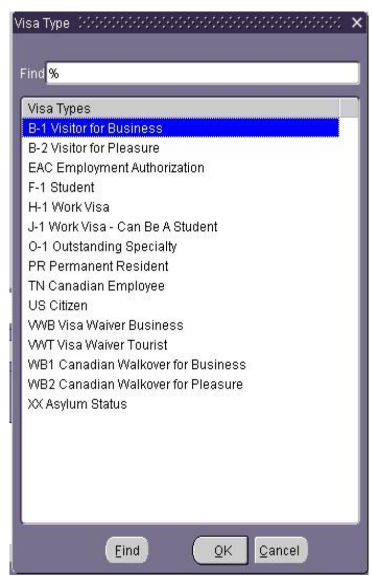
3. In the **I-9 STATUS** field, click the LOV and select the appropriate I-9 Status from the list. Click **OK**. For information regarding I-9's go to Records Administration webpage.
   Click here.

NOTE: There are only three options listed here -- Yes, No, and Not Required - Trainee. You can submit the document with a No answer, but it will not be processed and completed until the I-9 has been received in Records Administration.



4. In the **VISA TYPE** field click on the LOV.

   a. If the employee was born in the United States and has maintained citizenship in the United States, select **US CITIZEN** from the LOV and click **OK.**

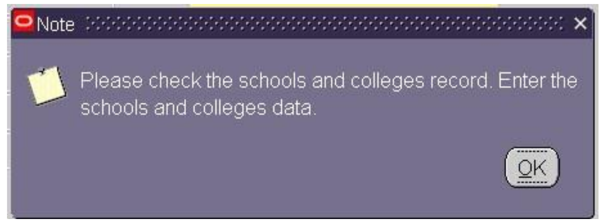


   b. If employee is considered a non-resident alien, select the appropriate ***Visa Type*** from the **LOV** and click **OK**.

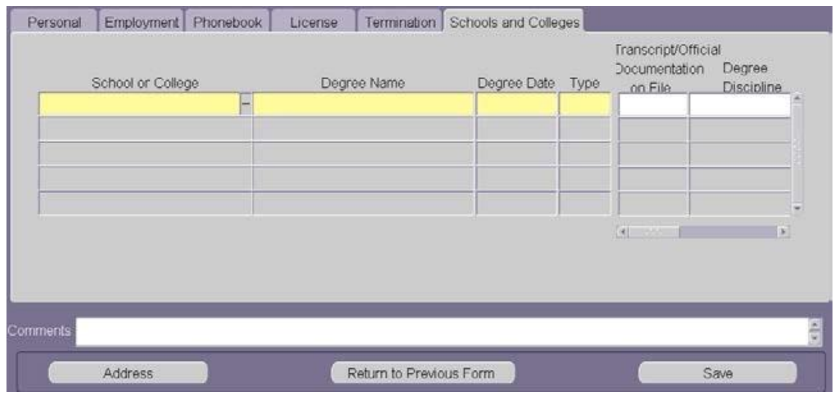
      For more information on Visa Types, go to Office of International Student & Scholar Services (ISSS) webpage. **Click here:**

5. When required, enter future ***Work Visa Expiration Date***. Date can be typed directly into the field using the dd/mmm/yyyy and must be a ***future*** date.

6. Click on the **SAVE** button. The following note will display. Click on OK and proceed to enter the schools and college data.

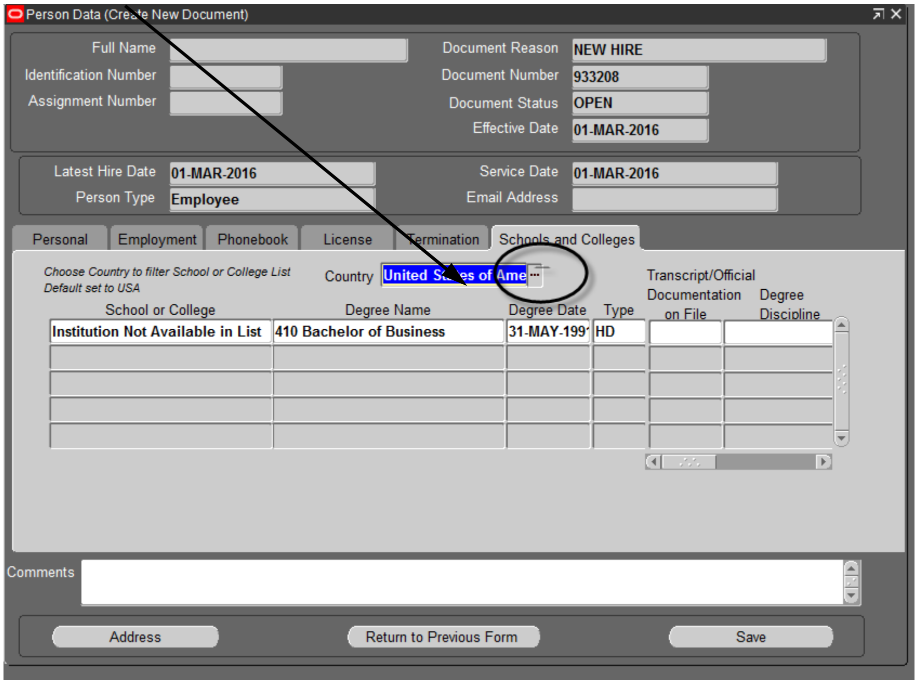


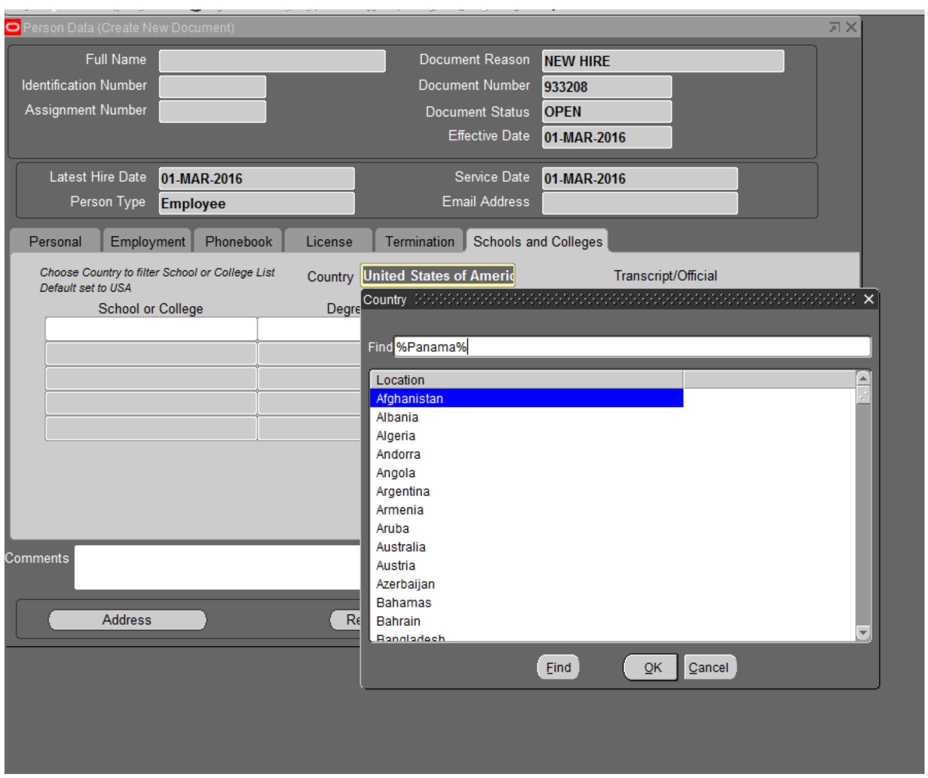
7. Click on the **SCHOOLS AND COLLEGE** tab.



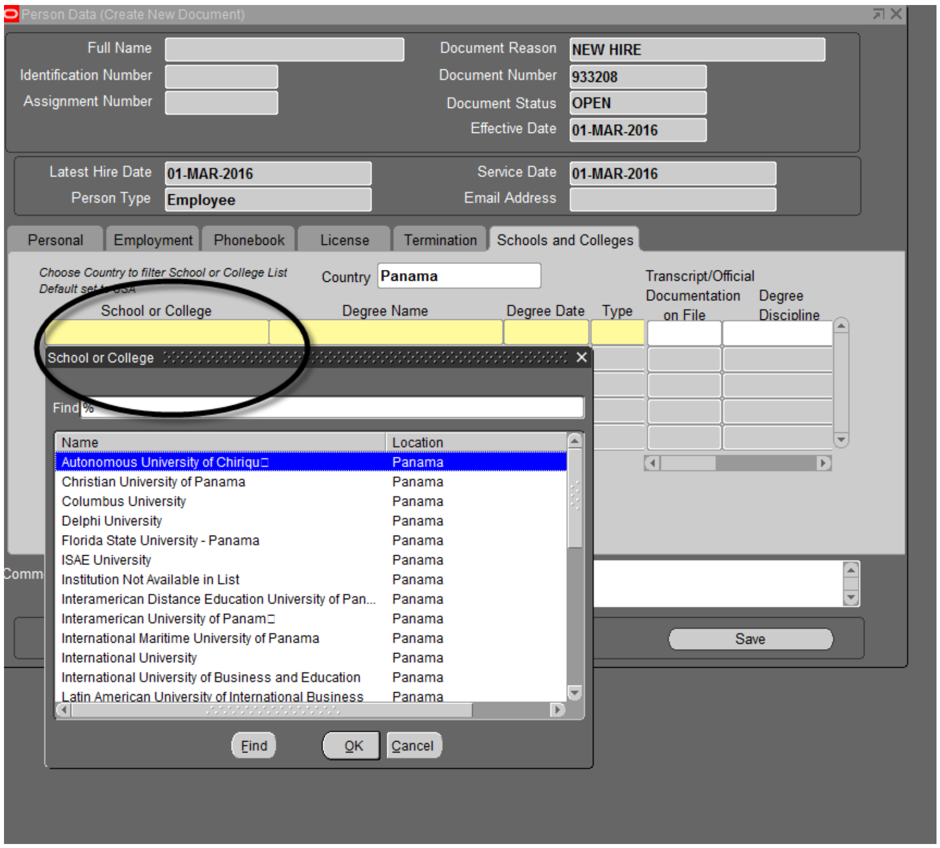
Entering Schools and Colleges Information

1. Select the **COUNTRY** from the LOV, type in the country name or use wildcards.



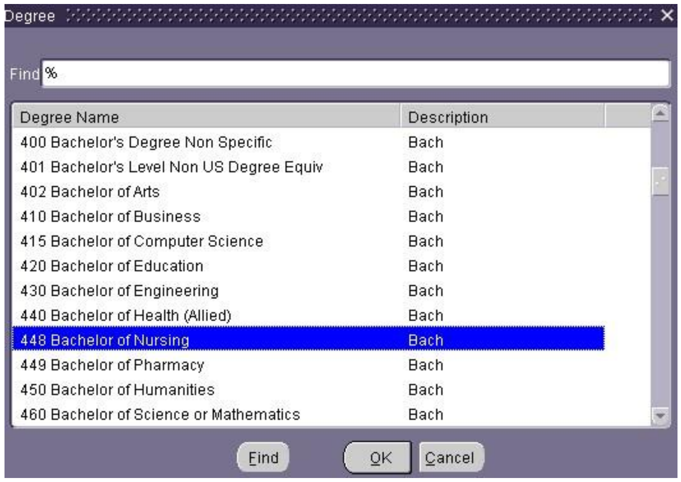


2. Click in the School or College field to pull up a list of the available Institutions in that country.

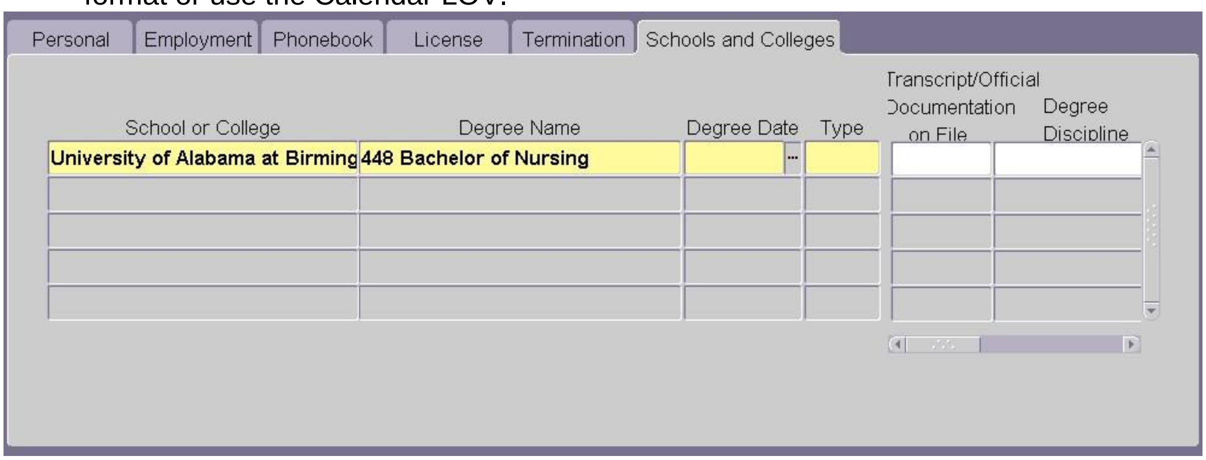


Note: The School and College LOV defaults to The United States, if you do not change this, you will only be able to access Institutions in the US.
If the institution does not appear in the country listing, select <u>Institution Not Available in Listing</u>.

1. Click in the **Degree Name** field. Using the LOV, select the appropriate degree. ***<u>Enter the highest level of degree the employee has earned, (Examples: High School Graduate, GED, Post High School Coursework, Bachelors, Masters, or PhD etc.</u>*** Click **OK.**



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



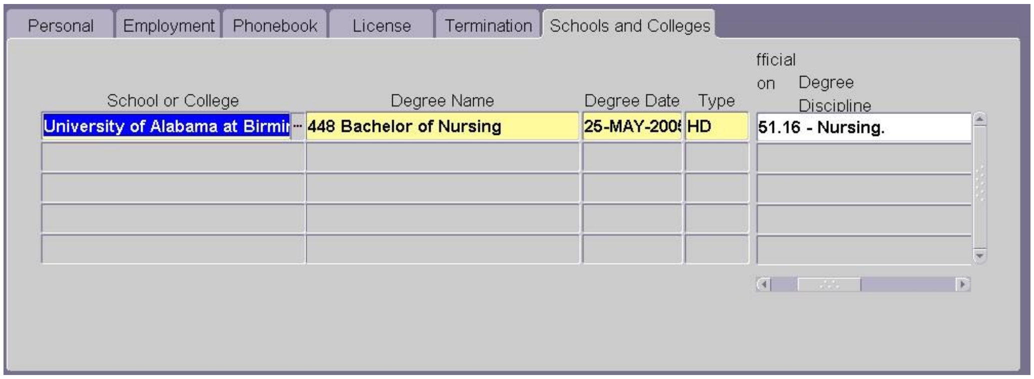
3. Click in the **TYPE** field. Select ***Other Degree* (OD)** or ***Highest Degree (HD)*** from the LOV. A person can only have one highest degree. All others must be marked as Other Degree (OD).

4. 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.

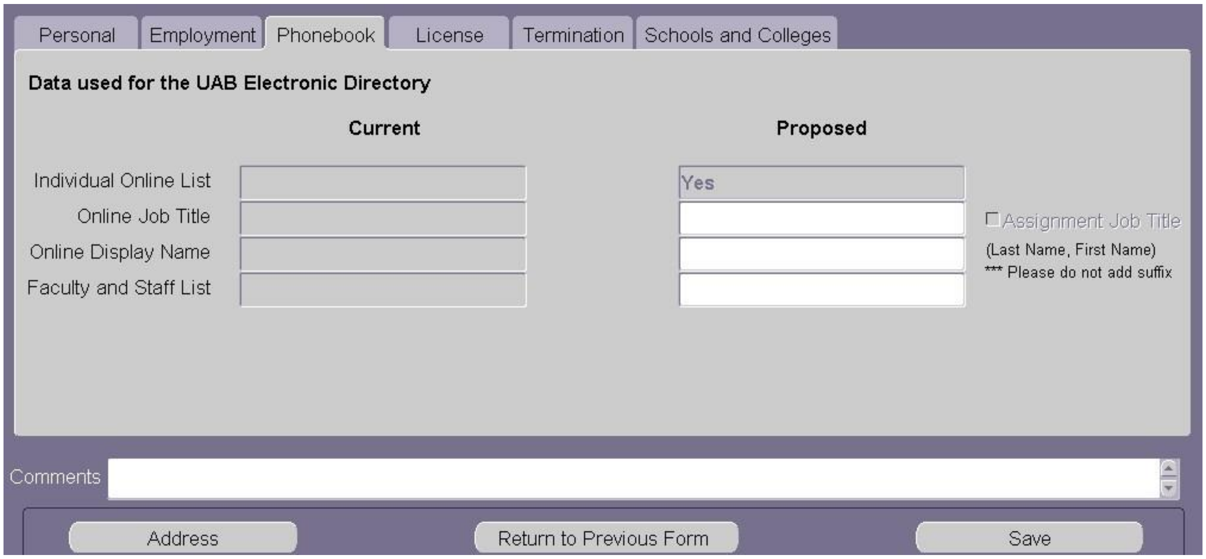
5. For Faculty and Credential Staff Course Instructors only. Type ***Yes*** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.

6. 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.



7. Click on Save.

Entering Phonebook Information



1. **INDIVIDUAL ONLINE LIST** field defaults to **Yes**. All employees will be listed in the UAB Electronic phonebook.

2. Click in the **ONLINE JOB TITLE** field ***only*** if the employee's title to be listed in either the UAB paper phonebook or electronic phonebook is ***different*** than the assigned job title. Enter the ***desired job title***.

3. Click in the **ONLINE DISPLAY NAME** field ***only*** if the employee's name is to be listed in either the UAB paper phonebook or electronic phonebook ***differently*** than what was entered on the **PERSONAL** Tab. ***The proper format for this field is: last name, first name. No space between the comma and first name.***

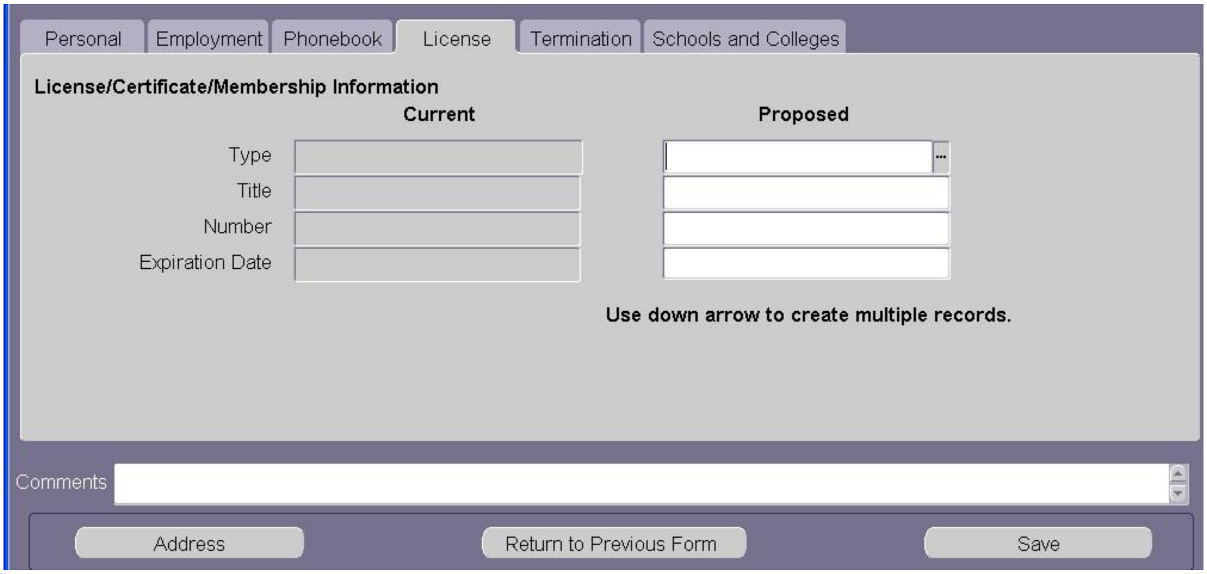
4. Click the **LOV** in the **FACULTY AND STAFF LIST** field. Choosing ***Yes*** will include the employee in the UAB paper phonebook listing; choosing ***No*** will exclude the employee. Click **OK. ****

******** *After December 2009, the white pages section of the UAB "paper" Phonebook will be made available online as a pdf. Faculty and Staff employees with "Yes" in the Faculty and Staff List field will be included in the online pdf.*

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

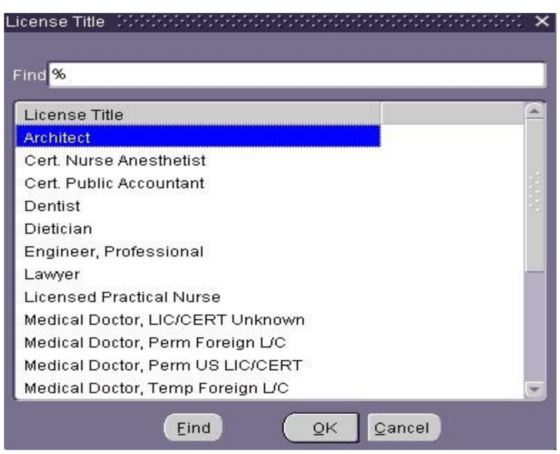
Entering License, Certification, Membership Information

1. Click on the **LICENSE** tab if applicable. ***Note: Information entered on this tab is entered only when the employee holds a professional license, membership or certification.***



2. 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.***

3. If you select ***License***, a form listing of **LICENSE TITLES** appears.



Select the appropriate ***License title***, Click **OK**.

4. If you select ***Certification, Membership or Professional Competency***, you will need to type ***the appropriate title*** in the **TITLE** field**.**

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

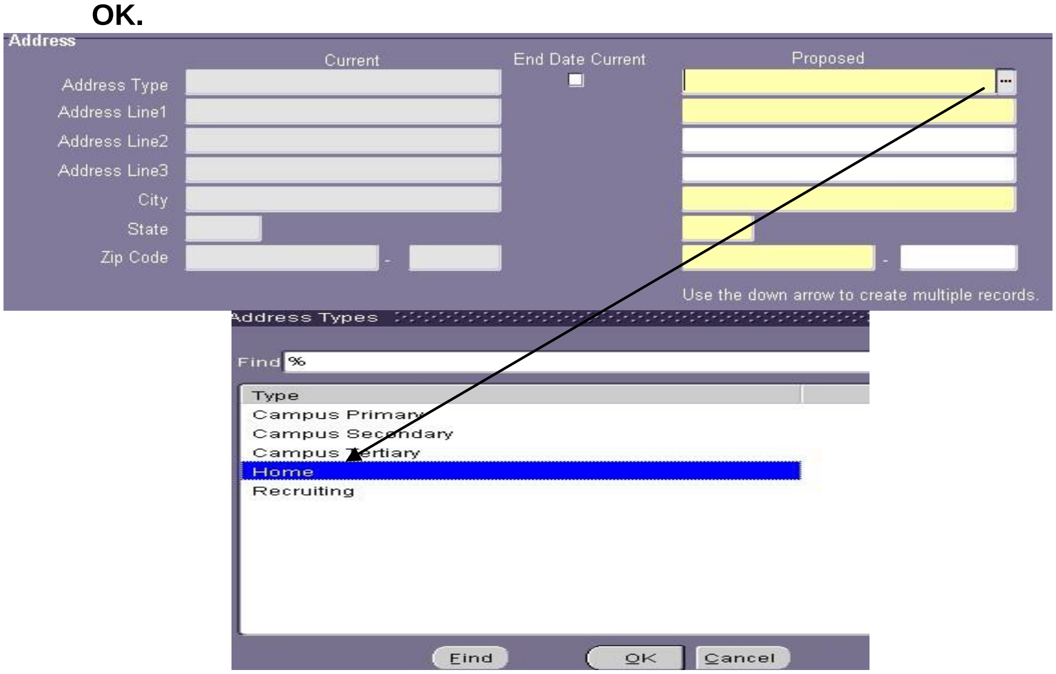
6. In the **EXPIRATION DATE** field, choose the ***expiration date*** from the Calendar LOV or type the ***date*** in the **EXPIRATION DATE** field using the ***dd-mmm-yy*** format. ***Note: This date must be a future date.***

7. Click **SAVE** at the bottom of the form; click on the **ADDRESS** button to begin entering the employee's address information.

Entering Address and Phone Information

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.

1. Type ***Home*** or make the selection from the LOV in the **ADDRESS TYPE** field. Click **OK.**



2. Enter the ***employee's street address*** in the **ADDRESS LINE1** field. There are two more address lines available if needed.

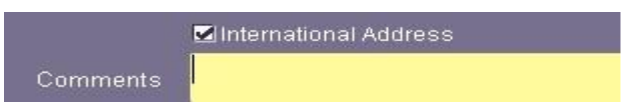
3. In the **CITY** field, click on the ***LOV***, the LOV brings up a **FIND** field. In the **FIND** field type ***the name of the city in which the employee lives***, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

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

4. 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.

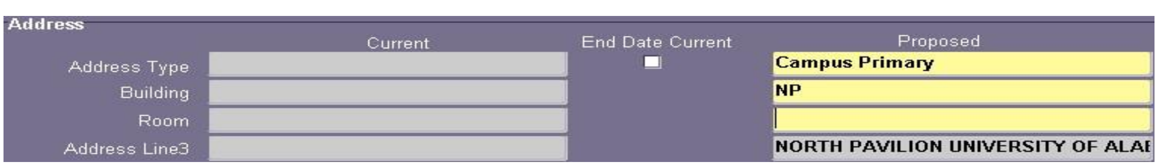
5. Click in the **ZIP CODE** field, type the ***correct Zip Code.*** Click **SAVE.**

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.



6. To enter the **campus address**, click in the **ADDRESS TYPE** field and ***press the down arrow***. The **ADDRESS TYPE** field becomes blank. Click on the **LOV** and select ***Campus Primary.*** Click **OK.**

7. 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.



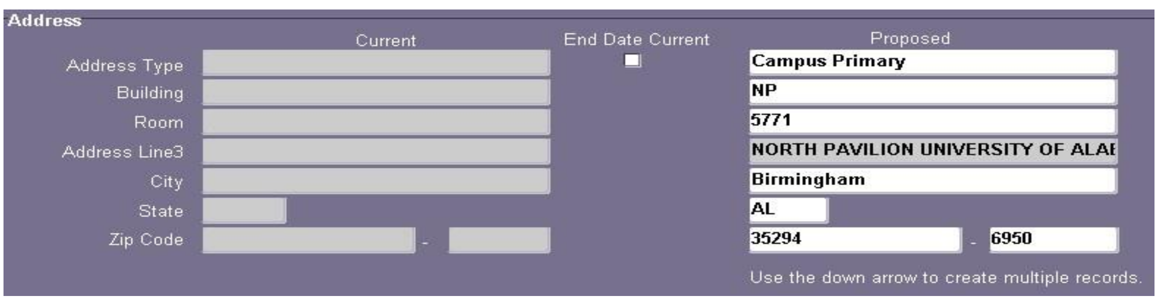
Note: Building field LOV provides a listing of all UAB Buildings and Building Codes. This is a rather long list so be as specific as possible when trying to locate a building. Using the percent (%) sign and the first letter of the building name will help to limit the list.

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.



12. To enter both Home and Campus phone numbers, click in the **TYPE** field located in the Phones region of the form.

13. Type ***Home*** in the **TYPE** field or choose ***Home*** from the LOV.

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

15. Type the ***effective start date*** in the **DATE FROM** field or use the calendar LOV. ***Usually this is the effective date of the document***.

16. Click in ***the row under the Home phone listing***. Type in ***Campus Primary*** or choose ***Campus Primary*** from the **PHONES TYPE** LOV.

17. Enter the ***ten digit campus telephone number***.

18. Type the ***effective start date*** in the **DATE FROM** field or use the Calendar LOV. ***Usually this is the effective date of the document***. Click the **SAVE.**

Note: Repeat these steps to enter additional phone numbers for the employee. Use the down arrow on your keyboard to enter multiple records, if necessary.

19. Click the ***SAVE*** button; then click return to **RETURN PREVIOUS FORM** button. This will take you back to the **PERSON DATA FORM**.

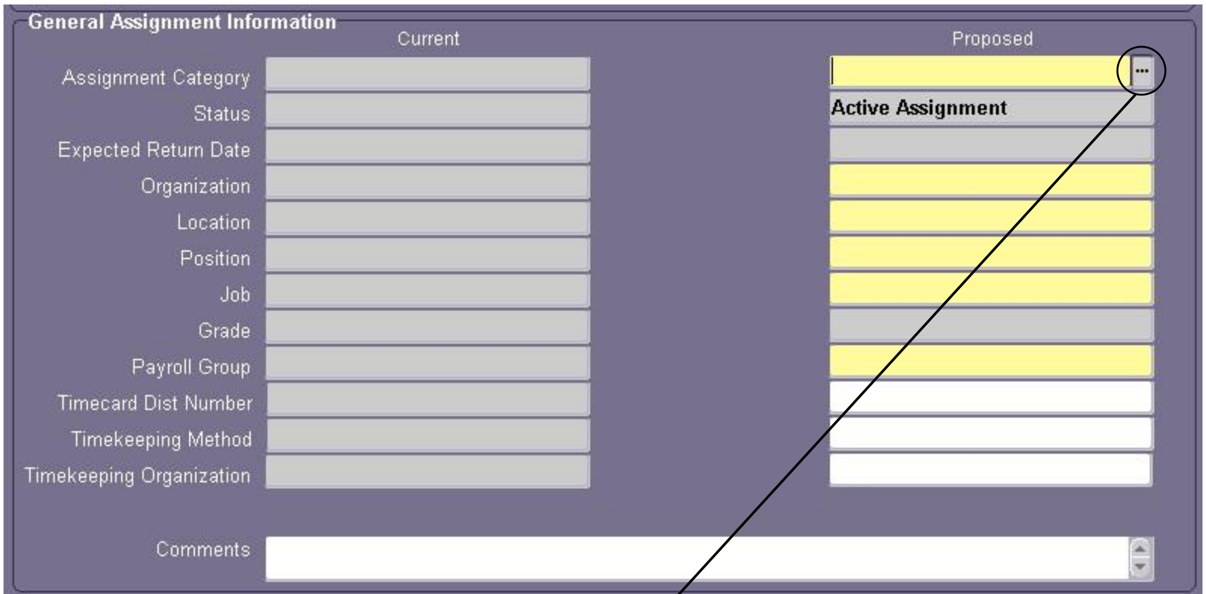
20. Click **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA FORM** to return to the **ACT MAIN FORM**.

21. Click the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.

The information on the **ASSIGNMENT** form identifies the employee's employment status, which determines eligibility for employee benefits, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting an employee's worked time to payroll.

Entering Assignment Form Information

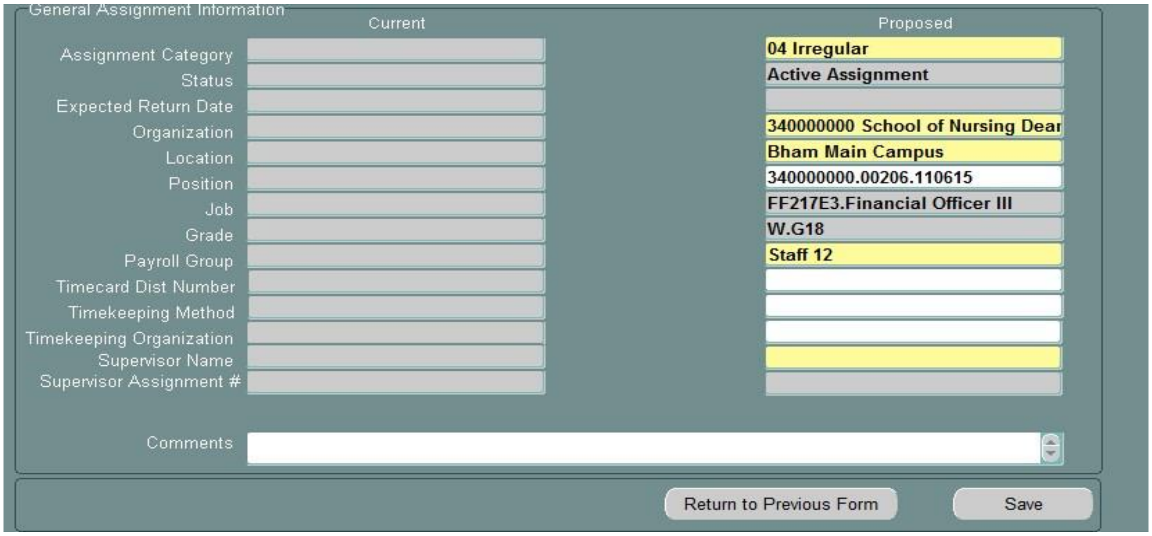
1. Click on the **Assignment** button located on the **ACT Main Form**. This will open the **Assignment** form.



2. Select the ***appropriate assignment category*** from the **Assignment Category LOV.** For a listing of UAB Assignment categories ***click here***. (You and UAB Section 2.1) Click ***Ok***.

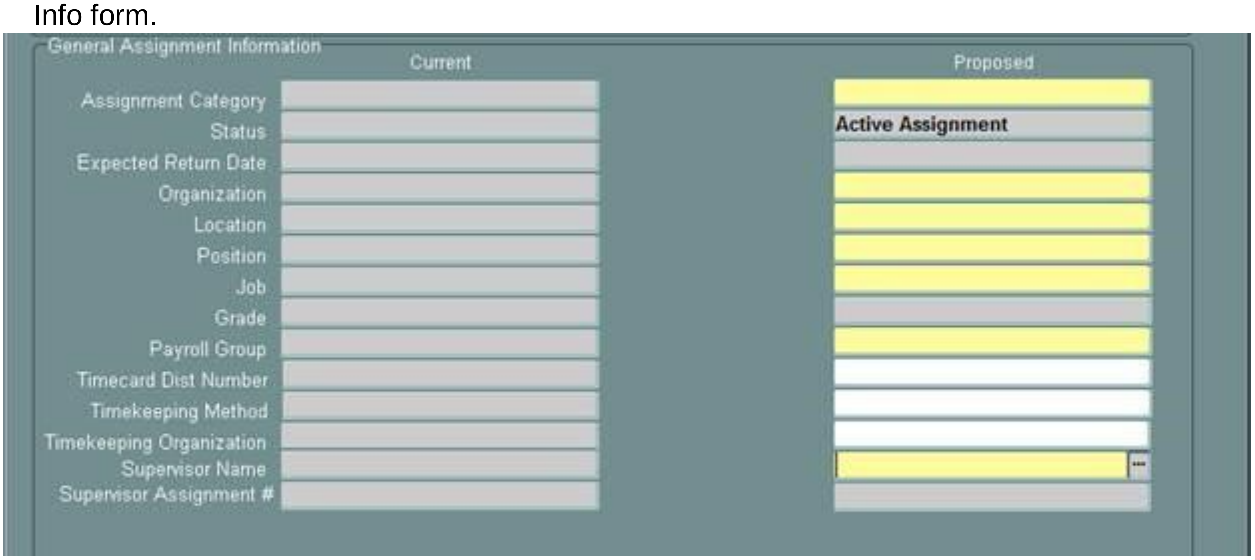
Note: When either the ***06 Student or 11 Work Study Student*** assignment categories is selected, return to the ***Person Data Form*** and enter the student's ***Blazer ID*** in the required **Blazer ID** field.

3. Click in the **Organization** field; type the ***appropriate organization*** in which the employee will be affiliated. Press **Enter**. The **Location** field will automatically populate, or use the Location LOV to select location.

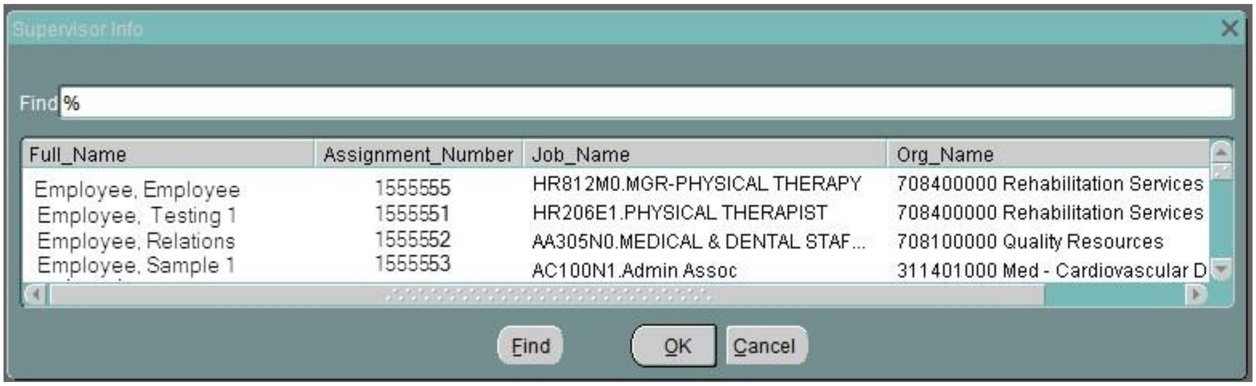


4. Click in the **POSITION** field, select the ***position code*** from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization - both vacant and filled. By entering the correct position, the **JOB** field and **GRADE** field will be auto populated.

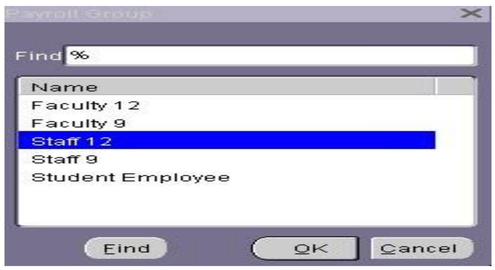
5. Click on the LOV located in the Supervisor Name field. This will open the Supervisor Info form.



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. Select the ***appropriate payroll group*** from the **PAYROLL GROUP** LOV. Click **OK**



Note: Faculty 12 = Faculty who work 12 months of the year. Faculty 9 = Faculty who work 9 months of the year. Staff 12 = Staff who work 12 months of the year. Staff 9 = Staff who work 9 months of the year.

7. If this is a biweekly assignment, enter the employee's timekeeping information.

   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.

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

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

10. Click the **RETURN TO PREVIOUS FORM** button located at the bottom of the form and return to the **ACT MAIN FORM**.

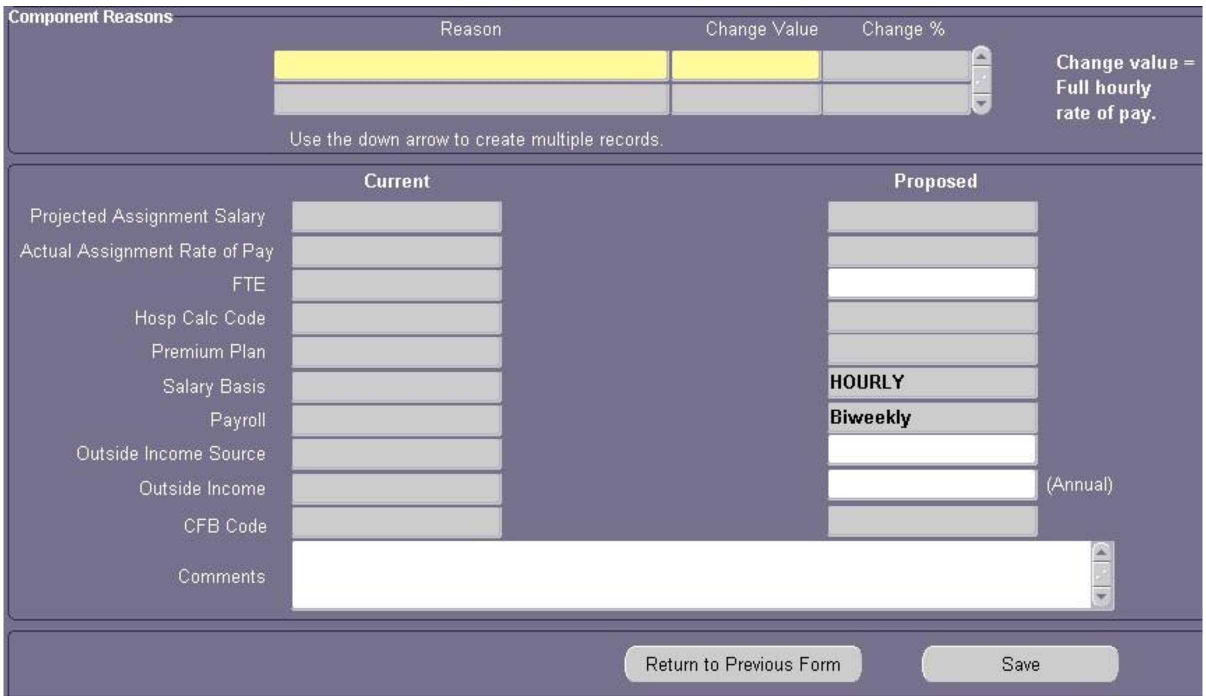
11. Click on the **SALARY** button at the bottom of the **ACT MAIN FORM.**

The **SALARY** form should be completed before entering the ***Labor Sources*** data.

Entering Salary Form Information

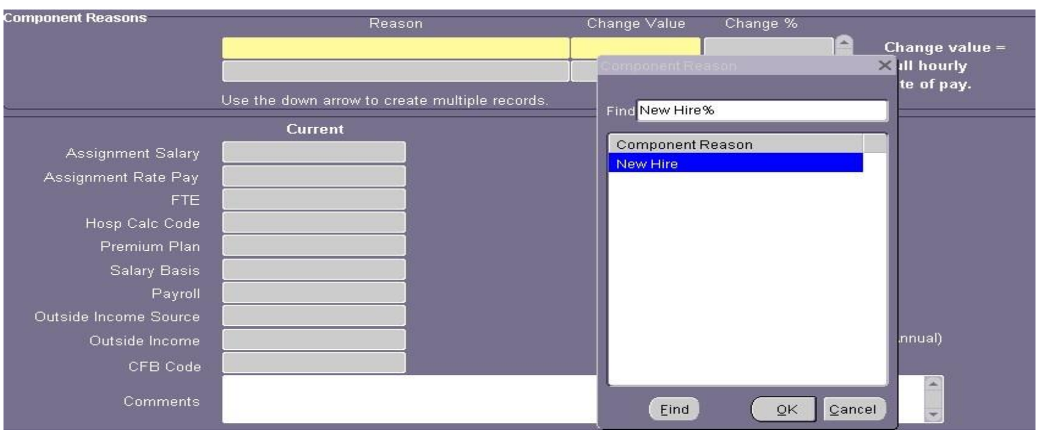
1. Click the **SALARY** button at the bottom of the **ASSIGNMENT FORM** or the **ACT MAIN FORM.** This will open the **SALARY** Form.

Note: **The yellow required field or fields in the PROPOSED section must be completed first. The yellow required fields will be different according to your organization. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.**



A. **SALARY BASIS** field is a required field, using the LOV select the appropriate **Salary Basis** Type; click **OK**.

2. In the Component Reasons section, click in the **REASON** Field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields. Using the LOV in the Reason field select ***New Hire***, click **OK**.



3. Click in the **CHANGE VALUE** field; enter either the ***hourly rate*** (for a bi-weekly paid employee) or the ***monthly rate*** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered.

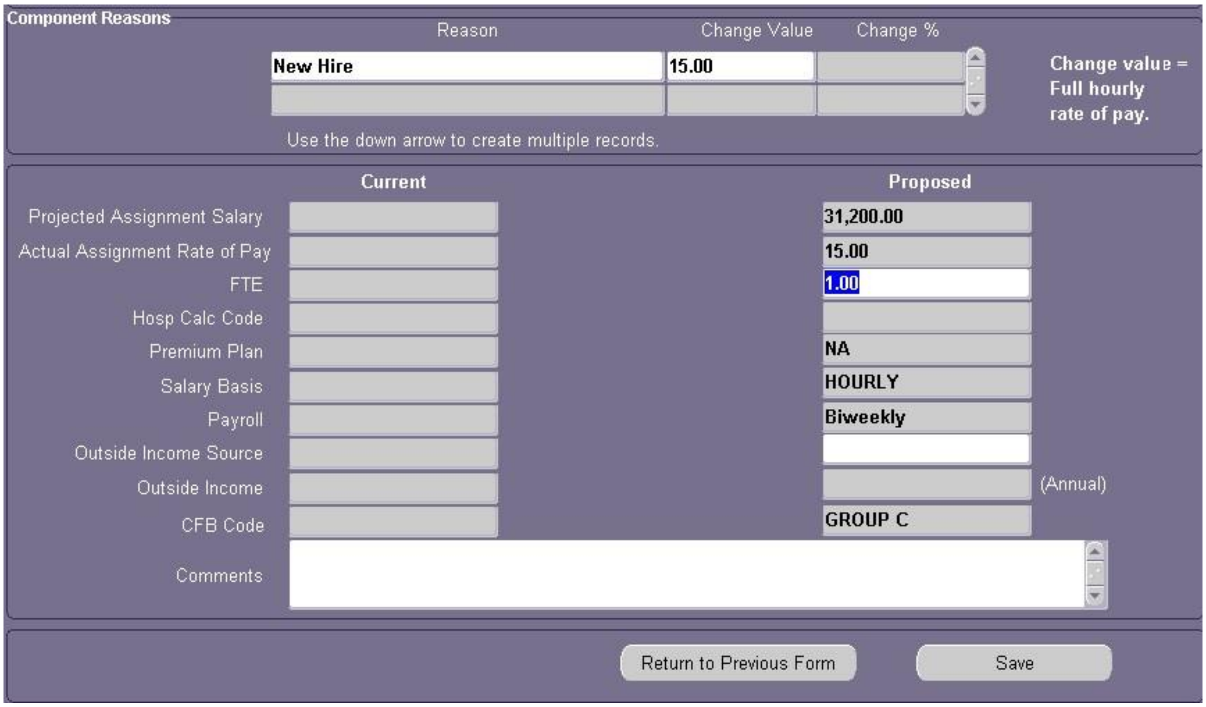
4. Enter the ***full-time equivalency*** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is ***strongly recommended*** that you enter this information for Records. For explanation of FTE values ***click here.***

5. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK.**

Note: There are only two outside income sources -- <u>VA and Eye Foundation</u>.

6. Enter the ***amount of income provided by this source*** in the **OUTSIDE INCOME** field, if applicable. ***<u>This should be an annual amount</u>***.

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



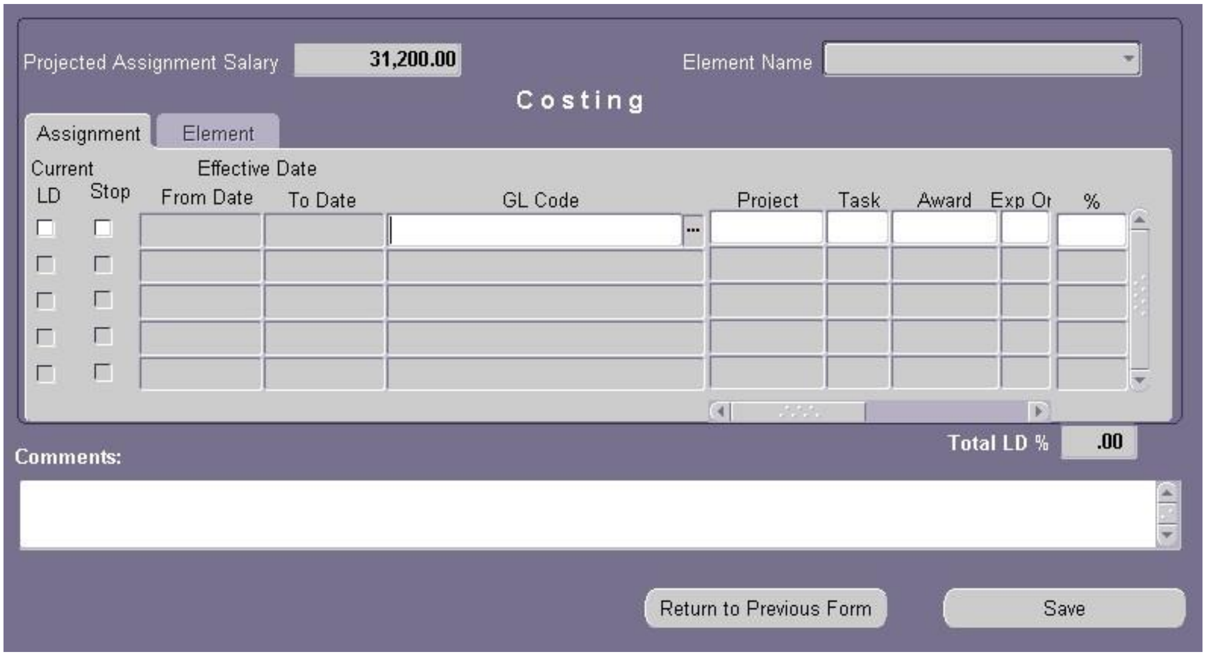
8. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ACT MAIN FORM**.

9. Click the **LABOR SOURCE** button at the bottom of the **ACT MAIN FORM**.

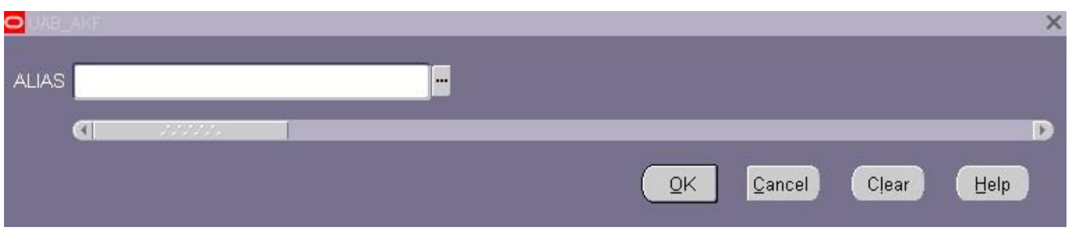
The **LABOR SOURCES** indicate what account strings the employee's salary and associated fringe benefits will be charged to. Because the GL and GA account structures are different, there are differences in entering the account string data.

Entering Labor Sources Form Information

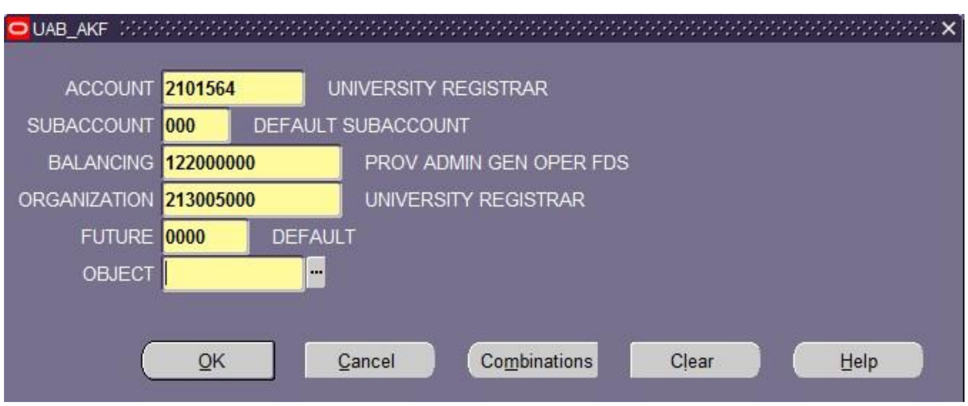
Entering General Ledger (GL) Information



1. Click on the **GL Code** LOV. This opens the **UAB_AKF Find** window.



2. Enter the ***ten-digit GL Account number*** in the **ALIAS** field; click **OK**. This opens the window below. All but the **Object** field has been auto populated.

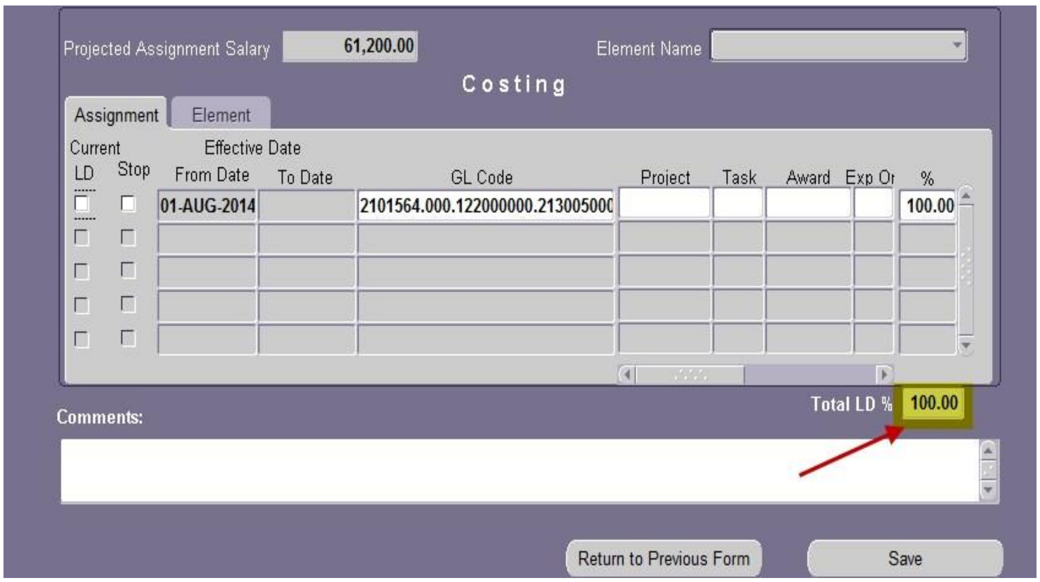


3. Click in the **OBJECT** field and enter ***Zero* (0)**; Click **OK**. You will be taken back to the **LABOR SOURCE** form.

4. Type in the ***percent of the employee's funding*** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

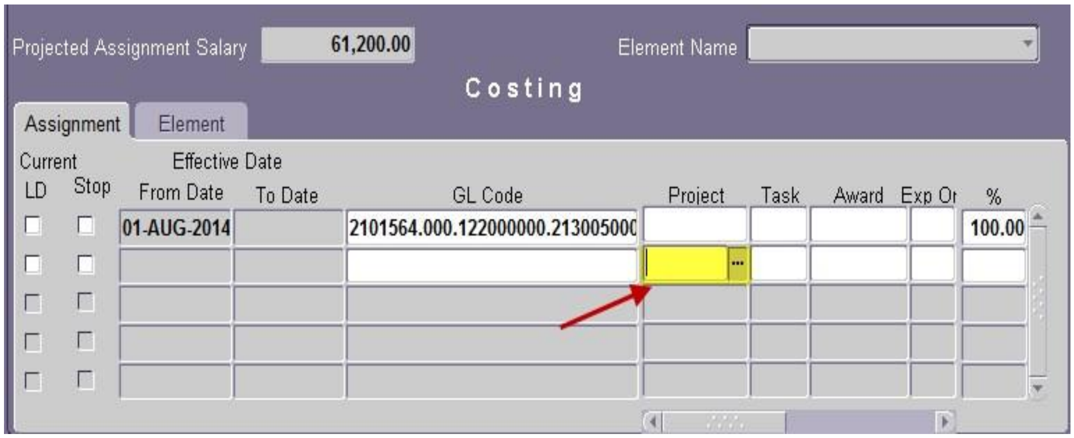
5. Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field has to total **100%** before you can save the document.



6. Once the **TOTAL LD%** field equals 100%, click **SAVE**.

Entering Grant (GA) Funding Sources

1. Click one time in the **PROJECT** field of the next available row.



2. Type the ***project number*** in the **PROJECT** field or choose the ***Project number*** from the LOV. Press the **TAB** key or click in the next **TASK** field.
3. Type the ***task number*** in the **TASK** field or choose the ***Task number*** from the LOV. **TAB** to the **AWARD** field or click in the **AWARD** field.

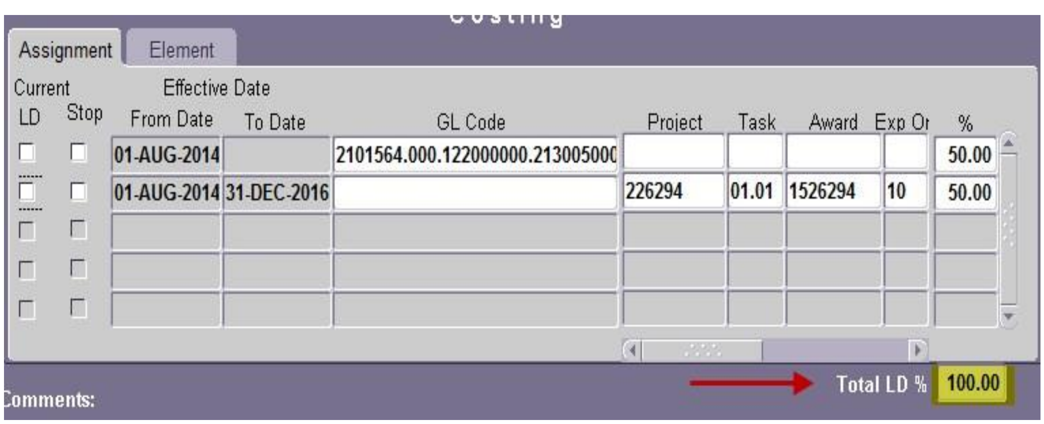
4. Type the ***award number*** in the **AWARD** field or choose the ***Award number*** from the LOV. **TAB** to or click in the next field.

5. Type in the ***organization number*** or choose the ***Expenditure Organization number*** from the LOV.

Note: For the hospital, this will be 70. For the university, this will be 10.

7. Type in the ***percent of the employee's effort*** to be charged to the project number in the **%** field.

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



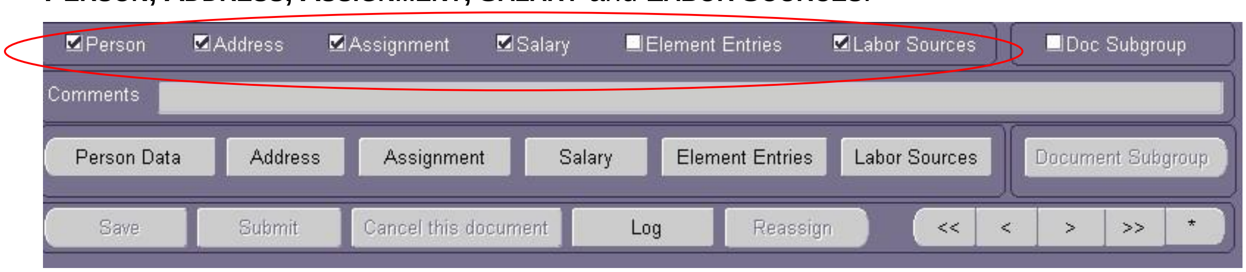
***Note: TOTAL LD% must equal 100% before you can save the document*.**

9. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM**.

Before submitting the New Hire document, verify all information is entered correctly and all attachments are ready to be submitted. The HR Officer submits the New Hire document for approval. At that point, the document status changes from Open to Ready and enters the approval path.

Submitting a Complete New Hire Document

1. On the **ACT MAIN FORM,** checkmarks have been inserted in the checkbox next to **PERSON, ADDRESS, ASSIGNMENT, SALARY** and **LABOR SOURCES**.



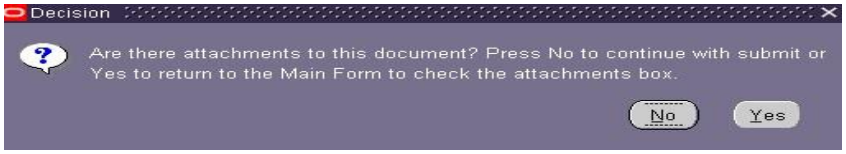
Note: A check will be inserted automatically when REQUIRED FIELDS on all screens and tabs have been completed. All check boxes must be checked (excluding Element Entries, except on Status 99 New Hire Document) before submitting the document.

2. On the **ACT MAIN FORM,** verify the Attachments check box has a checkmark; assemble all attachments to be submitted with New Hire document.

3. Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**

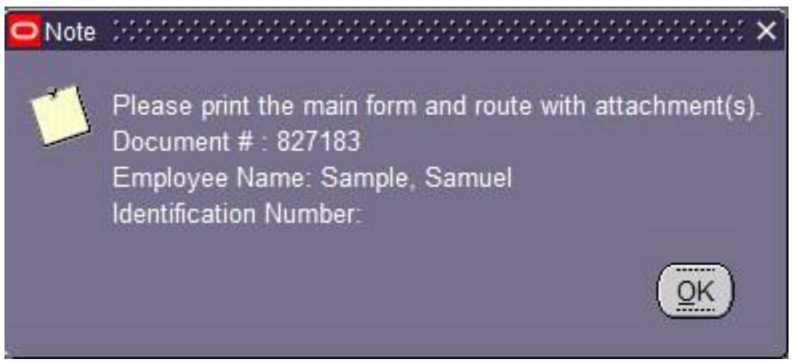
4. Click the **SUBMIT** button.

5. If the document was submitted without a checkmark in the **ATTACHMENTS** box on the **ACT MAIN FORM**, the following **DECISION** window displays.



6. Click **YES** to return to the **ACT MAIN FORM**; click in the **ATTACHMENTS** checkbox and resubmit the document.

7. The following Note displays.



8. Click **OK**. Print the **ACT MAIN FORM**; attach a printed copy of the **ACT MAIN FORM** to attachments being sent 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).

****** <u>BE SURE TO RECORD YOUR DOCUMENT NUMBER BEFORE YOU EXIT THE NEW HIRE DOCUMENT</u>. You will not be able to locate the new employee by name, social security number, or employee ID number until the document has reached COMPLETE status.**

10. Once the **NEW HIRE** 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. When the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

11. The requestor of the **NEW HIRE** document will receive email notification when an employee's **NEW HIRE** document has entered a **COMPLETE** status.

The employee can now create a Blazer ID. For information on setting up a ***Blazer ID*** go to BlazerID Central webpage. **Click here.**

RETURN TO TOP