

## **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.

#### **Creating a New Hire ACT Document**

##### **Entering Person Data Information**

[Entering Personal Information](#)

[Entering Employment Information](#)

[Entering Schools and Colleges Information](#)

[Entering Phonebook Information](#)

[Entering License, Certification, Membership Information](#)

[Entering Address and Phone Information](#)

##### **Entering Assignment Form Information**

##### **Entering Salary Form Information**

##### **Entering Labor Sources Form Information**

[Entering General Ledger \(GL\) Information](#)

[Entering Grant \(GA\) Funding Sources](#)

##### **Submitting A Complete New Hire Document**

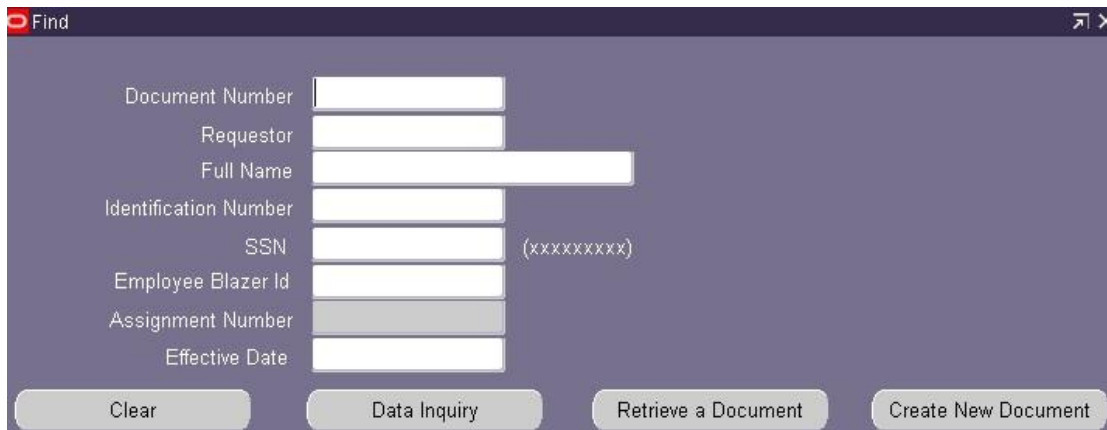
## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

UAB HR Officer → HR Transactions → ACT → Find Window

#### Creating a New Hire ACT Document

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

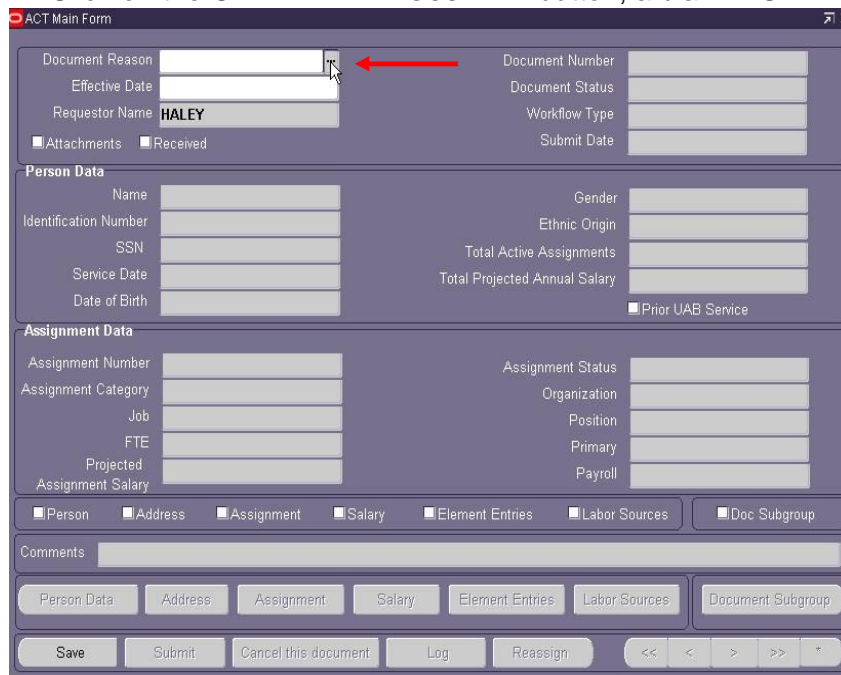


The screenshot shows the 'Find' window with the following fields and buttons:

| Field                 | Value/Placeholder |
|-----------------------|-------------------|
| Document Number       |                   |
| Requestor             |                   |
| Full Name             |                   |
| Identification Number |                   |
| 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; a blank **ACT MAIN FORM** will open.



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

**Document Reason** (LOV box) | **Document Number** | **Document Status**

**Effective Date** | **Workflow Type**

**Requestor Name** (HALEY) | **Submit Date**

☐ Attachments ☐ Received

**Person Data**

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

**Assignment Data**

| Field                       | Value/Placeholder |
|-----------------------------|-------------------|
| Assignment Number           |                   |
| Assignment Category         |                   |
| Job                         |                   |
| FTE                         |                   |
| Projected Assignment Salary |                   |
| Assignment Status           |                   |
| Organization                |                   |
| Position                    |                   |
| Primary                     |                   |
| Payroll                     |                   |

☐ Person ☐ Address ☐ Assignment ☐ Salary ☐ Element Entries ☐ Labor Sources ☐ Doc Subgroup

**Comments**

Buttons at the bottom: Save, Submit, Cancel this document, Log, Reassign, <<, <, >, >>, ↑

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

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### New Hire: Submitting a New Hire Document

4. The **DOCUMENT REASON** window displays. Select **NEW HIRE** and click **OK**.

| Doc_Reason        | Doc_Type |
|-------------------|----------|
| CREATE VOLUNTEER  | HIRE     |
| NEW HIRE          | HIRE     |
| NEW TRAINEE AWARD | HIRE     |

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.

August 2014

| S  | M  | T  | W  | T  | F  | S  |
|----|----|----|----|----|----|----|
| 27 | 28 | 29 | 30 | 31 | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | 1  | 2  | 3  | 4  | 5  | 6  |

25-AUG-2014

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 **Attachments** to accompany a **New Hire** document, [click here](#).

Document Reason: NEW HIRE

Effective Date: 01-AUG-2014

Requestor Name: ALHOWARD

☒ Attachments ☐ Received

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

- 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.



The screenshot shows a software window with a dark blue header and a light blue body. The body contains two columns of text boxes. The left column has 'Document Reason' (NEW HIRE), 'Effective Date' (01-AUG-2014), and 'Requestor Name' (ALHOWARD). Below these are two checkboxes: 'Attachments' (checked) and 'Received' (unchecked). The right column has 'Document Number' (827183), 'Document Status' (OPEN), 'Workflow Type' (HIRE), and 'Submit Date' (empty). The window has a standard OS title bar with a red close button and a maximize button.

|   |                                   |                 |        |
|---|-----------------------------------|-----------------|--------|
| Document Reason                                 | NEW HIRE                          | Document Number | 827183 |
| Effective Date                                  | 01-AUG-2014                       | Document Status | OPEN   |
| Requestor Name                                  | ALHOWARD                          | Workflow Type   | HIRE   |
| <input checked="" type="checkbox"/> Attachments | <input type="checkbox"/> Received | Submit 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.

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## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Person Data Information

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

The screenshot displays the ACT Main Form interface. At the top, the 'Document Reason' is set to 'NEW HIRE', 'Effective Date' is '01-AUG-2014', and 'Requestor Name' is 'ALHOWARD'. The 'Document Number' is '827183', 'Document Status' is 'OPEN', and 'Workflow Type' is 'HIRE'. Below these fields, there are checkboxes for 'Attachments' (checked) and 'Received' (unchecked). The 'Person Data' section contains fields for Name, Identification Number, SSN, Service Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Projected Annual Salary, and a checkbox for 'Prior UAB Service'. The 'Assignment Data' section includes fields for Assignment Number, Assignment Category, Job, FTE, Projected Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll. Below these sections are checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. A 'Comments' text area is located below the checkboxes. At the bottom, there is a row of tabs: 'Person Data' (highlighted in yellow), 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sourc...', and 'Document Subgroup'. Below the tabs are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and a set of navigation arrows.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Personal Information

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

**Person Data (Create New Document)**

|                       |  |                 |             |
|-----------------------|--|-----------------|-------------|
| Full Name             |  | Document Reason | NEW HIRE    |
| Identification Number |  | Document Number | 827183      |
| Assignment Number     |  | Document Status | OPEN        |
|                       |  | Effective Date  | 01-AUG-2014 |

|                  |             |               |             |
|------------------|-------------|---------------|-------------|
| Latest Hire Date | 01-AUG-2014 | Service Date  | 01-AUG-2014 |
| Person Type      | Employee    | Email Address |             |

Personal | **Employment** | Phonebook | License | Termination | Schools and Colleges

|               | Current | Proposed |
|---------------|---------|----------|
| SSN           |         |          |
| Last Name     |         |          |
| First Name    |         |          |
| Middle Names  |         |          |
| Suffix        |         |          |
| Title         |         |          |
| Date Of Birth |         |          |
| Gender        |         |          |

Comments

Address | Return to Previous Form | Save

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.



[here.](#)

**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.](#)

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### New Hire: Submitting a New Hire Document

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.

|               | Current | Proposed    |
|---------------|---------|-------------|
| SSN           |         | 222-11-3333 |
| Last Name     |         | Example     |
| First Name    |         | One         |
| Middle Names  |         |             |
| Suffix        |         |             |
| Title         |         | Mr.         |
| Date Of Birth |         | 15-APR-1978 |
| Gender        |         | MALE        |

Comments:

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



## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Employment Information

Personal Employment Phonebook License Termination Schools and Colleges

Current Proposed

Ethnic Origin  
Veteran Status 100  
Veteran Status 100A  
I-9 Status  
Visa Type  
Work Visa Expiration Date

Not a Veteran

More info on Veteran Status

Comments

Address Return to Previous Form Save

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.

Ethnic Origin

Find %

Ethnic Origin

American Indian or Alaskan Native

Asian

Black or African American

Hispanic or Latino, regardless of race

Native Hawaiian or Other Pacific Islander

Two or More Races

White

Find OK Cancel

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**.

Veteran Status

Find %

Veteran Status

Armed Forces Service Medal (AFSM) Veteran

Disabled Vet, Other Protected, AFSM, Recently Separated

Disabled Veteran

Disabled, AFSM Veteran

Disabled, Other Protected Veteran

Disabled, Other Protected, AFSM Veteran

Disabled, Recently Separated Veteran

Disabled, Recently Separated, AFSM Veteran

Not a Veteran

Other Protected Veteran

Other Protected Veteran, AFSM, Recently Separated

Other Protected, AFSM Veteran

Other Protected, Recently Separated Veteran

Find OK Cancel



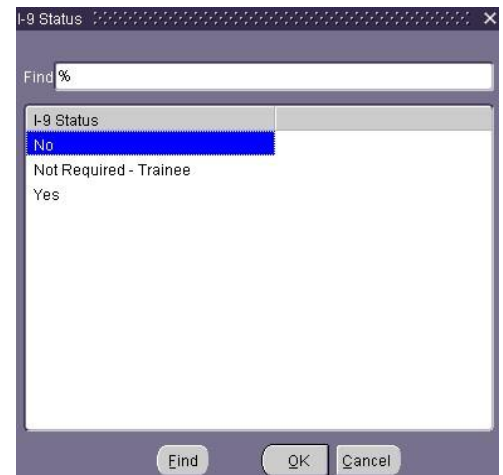
## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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.](#)

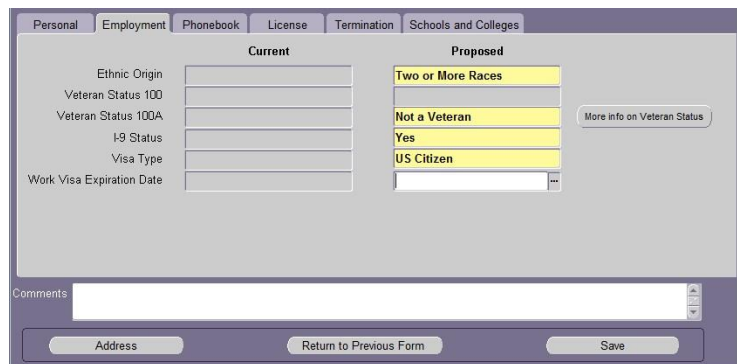
**NOTE: There are only three options listed here -- Yes, No, and Not Required - Trainee. You can submit the document with a No answer, but it will not be processed and completed until the I-9 has been received in Records Administration.**



The screenshot shows a dropdown menu titled "I-9 Status". The menu is open, displaying three options: "No", "Not Required - Trainee", and "Yes". The "No" option is currently selected and highlighted in blue. At the top of the menu is a search field labeled "Find %". At the bottom of the menu are three buttons: "Find", "OK", and "Cancel".

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**.

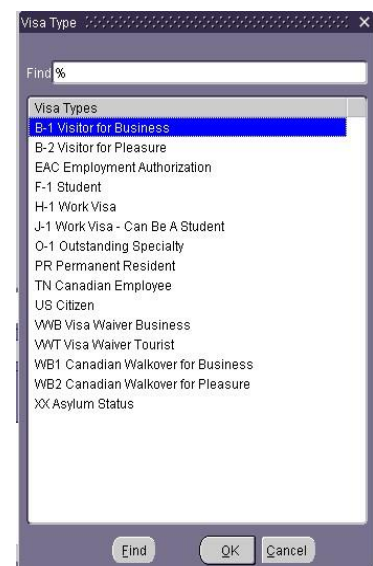


The screenshot shows the ACT form with the "VISA TYPE" field selected. The form has tabs for "Personal", "Employment", "Phonebook", "License", "Termination", and "Schools and Colleges". The "Employment" tab is active. The "Current" section contains fields for "Ethnic Origin", "Veteran Status 100", "Veteran Status 100A", "I-9 Status", "Visa Type", and "Work Visa Expiration Date". The "Proposed" section contains a dropdown menu for "Visa Type" with options: "Two or More Races", "Not a Veteran", "Yes", and "US Citizen". A "More info on Veteran Status" button is also present. At the bottom of the form are buttons for "Address", "Return to Previous Form", and "Save".

- 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.

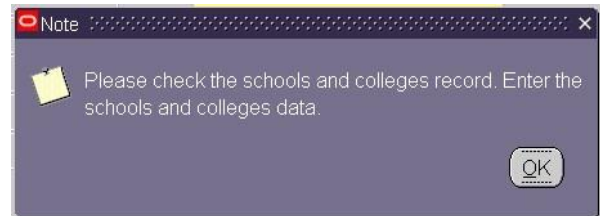


The screenshot shows a dropdown menu titled "Visa Type". The menu is open, displaying a list of visa types: "B-1 Visitor for Business", "B-2 Visitor for Pleasure", "EAC Employment Authorization", "F-1 Student", "H-1 Work Visa", "J-1 Work Visa - Can Be A Student", "O-1 Outstanding Specialty", "PR Permanent Resident", "TN Canadian Employee", "US Citizen", "WB Visa Waiver Business", "WWT Visa Waiver Tourist", "WB1 Canadian Walkover for Business", "WB2 Canadian Walkover for Pleasure", and "XX Asylum Status". The "B-1 Visitor for Business" option is currently selected and highlighted in blue. At the top of the menu is a search field labeled "Find %". At the bottom of the menu are three buttons: "Find", "OK", and "Cancel".

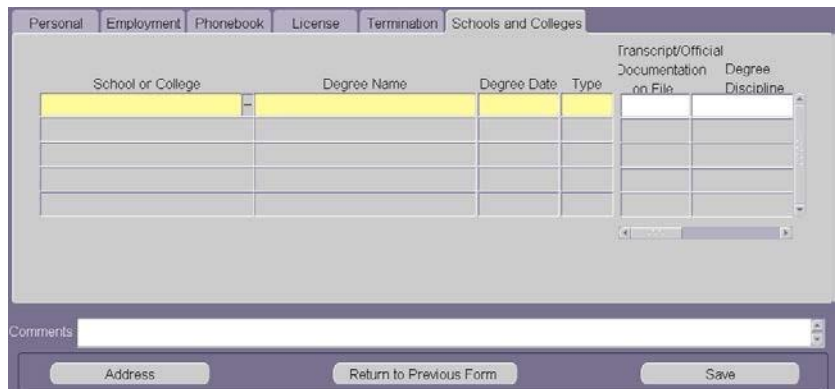
## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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



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

The screenshot shows the "Schools and Colleges" tab of the ACT Documentation form. The form has a tabbed interface with "Personal", "Employment", "Phonebook", "License", "Termination", and "Schools and Colleges". The "Schools and Colleges" tab is active, displaying a table with columns: "School or College", "Degree Name", "Degree Date", "Type", "Transcript/Official Documentation on File", and "Degree Discipline". The table has five rows, with the first row highlighted in yellow. Below the table is a "Comments" text area. At the bottom are three buttons: "Address", "Return to Previous Form", and "Save".

| School or College | Degree Name | Degree Date | Type | Transcript/Official Documentation on File | Degree Discipline |
|-------------------|-------------|-------------|------|---|-------------------|
|                   |             |             |      |   |                   |
|                   |             |             |      |   |                   |
|                   |             |             |      |   |                   |
|                   |             |             |      |   |                   |

# Appoint, Change and Terminate (ACT) Documentation

## New Hire: Submitting a New Hire Document

### Entering Schools and Colleges Information

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

Person Data (Create New Document)

Full Name: [ ] Document Reason: NEW HIRE  
Identification Number: [ ] Document Number: 933208  
Assignment Number: [ ] Document Status: OPEN  
Effective Date: 01-MAR-2016

Latest Hire Date: 01-MAR-2016 Service Date: 01-MAR-2016  
Person Type: Employee Email Address: [ ]

Personal Employment Phonebook License Termination **Schools and Colleges**

Choose Country to filter School or College List  
Default set to USA

Country: United States of America

| School or College                 | Degree Name              | Degree Date | Type | Transcript/Official Documentation on File | Degree Discipline |
|-----------------------------------|--------------------------|-------------|------|---|-------------------|
| Institution Not Available in List | 410 Bachelor of Business | 31-MAY-199  | HD   |   |                   |
|                                   |                          |             |      |   |                   |
|                                   |                          |             |      |   |                   |
|                                   |                          |             |      |   |                   |

Comments: [ ]

Address Return to Previous Form Save

Person Data (Create New Document)

Full Name: [ ] Document Reason: NEW HIRE  
Identification Number: [ ] Document Number: 933208  
Assignment Number: [ ] Document Status: OPEN  
Effective Date: 01-MAR-2016

Latest Hire Date: 01-MAR-2016 Service Date: 01-MAR-2016  
Person Type: Employee Email Address: [ ]

Personal Employment Phonebook License Termination **Schools and Colleges**

Choose Country to filter School or College List  
Default set to USA

Country: United States of America

Country dropdown menu open:

- Find: %Panama%
- Location: Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh

Comments: [ ]

Address Return to Previous Form Save

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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

The screenshot shows the 'Person Data (Create New Document)' form. The 'Schools and Colleges' tab is selected. The 'Country' field is set to 'Panama'. The 'School or College' field is circled in red, and a dropdown menu is open showing a list of institutions in Panama. The list includes:

| Name  | Location |
|---|----------|
| Autonomous University of Chiriquí                     | Panama   |
| Christian University of Panama                        | Panama   |
| Columbus University                                   | Panama   |
| Delphi University                                     | Panama   |
| Florida State University - Panama                     | Panama   |
| ISAE University                                       | Panama   |
| Institution Not Available in List                     | Panama   |
| Interamerican Distance Education University of Panama | Panama   |
| Interamerican University of Panama                    | Panama   |
| International Maritime University of Panama           | Panama   |
| International University                              | Panama   |
| International University of Business and Education    | Panama   |
| Latin American University of International Business   | Panama   |

**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 Institution Not Available in Listing.**

- Click in the **DEGREE NAME** field. Using the LOV, select the appropriate degree. **Enter the highest level of degree the employee has earned, (Examples: High School Graduate, GED, Post High School Coursework, Bachelors, Masters, or PhD etc.** Click OK.

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| Degree Name                              | Description |
|--|-------------|
| 400 Bachelor's Degree Non Specific       | Bach        |
| 401 Bachelor's Level Non US Degree Equiv | Bach        |
| 402 Bachelor of Arts                     | Bach        |
| 410 Bachelor of Business                 | Bach        |
| 415 Bachelor of Computer Science         | Bach        |
| 420 Bachelor of Education                | Bach        |
| 430 Bachelor of Engineering              | Bach        |
| 440 Bachelor of Health (Allied)          | Bach        |
| 448 Bachelor of Nursing                  | Bach        |
| 449 Bachelor of Pharmacy                 | Bach        |
| 450 Bachelor of Humanities               | Bach        |
| 460 Bachelor of Science or Mathematics   | Bach        |

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

| School or College                   | Degree Name             | Degree Date | Type | Transcript/Official Documentation on File | Degree Discipline |
|-------------------------------------|-------------------------|-------------|------|---|-------------------|
| University of Alabama at Birmingham | 448 Bachelor of Nursing |             |      |   |                   |
|                                     |                         |             |      |   |                   |
|                                     |                         |             |      |   |                   |
|                                     |                         |             |      |   |                   |
|                                     |                         |             |      |   |                   |

- 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).
- 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.**

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

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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.

| School or College                   | Degree Name             | Degree Date | Type | Official Degree Discipline |
|-------------------------------------|-------------------------|-------------|------|----------------------------|
| University of Alabama at Birmingham | 448 Bachelor of Nursing | 25-MAY-2004 | HD   | 51.16 - Nursing.           |
|                                     |                         |             |      |                            |
|                                     |                         |             |      |                            |
|                                     |                         |             |      |                            |
|                                     |                         |             |      |                            |

7. Click on Save.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Phonebook Information

The screenshot shows a web form titled "Data used for the UAB Electronic Directory". At the top, there are tabs for "Personal", "Employment", "Phonebook", "License", "Termination", and "Schools and Colleges". The "Phonebook" tab is selected. The form is divided into two columns: "Current" and "Proposed".

|                        | Current              | Proposed                         |
|------------------------|----------------------|----------------------------------|
| Individual Online List | <input type="text"/> | <input type="text" value="Yes"/> |
| Online Job Title       | <input type="text"/> | <input type="text"/>             |
| Online Display Name    | <input type="text"/> | <input type="text"/>             |
| Faculty and Staff List | <input type="text"/> | <input type="text"/>             |

To the right of the "Proposed" column, there is a checkbox labeled "Assignment Job Title (Last Name, First Name)" with a note below it: "\*\*\* Please do not add suffix".

Below the form fields is a "Comments" section with a text area. At the bottom of the form are three buttons: "Address", "Return to Previous Form", and "Save".

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.



## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### 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.**

The screenshot shows a software interface with tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The 'License' tab is selected. Below the tabs is a section titled 'License/Certificate/Membership Information' with two columns: 'Current' and 'Proposed'. Each column has four input fields: Type, Title, Number, and Expiration Date. Below these fields is a note: 'Use down arrow to create multiple records.' At the bottom of the form is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

2. Using the LOV in the **TYPE** field; choose the **appropriate License type**. **Note: If you choose License, the Title, Number, and Expiration Date fields become required fields.**

A dropdown menu showing the following options: Name, Certification, License (highlighted in blue), Membership, and Professional Competency Certification.

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

A dialog box titled 'License Title' with a search field labeled 'Find %'. Below the search field is a list of license titles: Architect, Cert. Nurse Anesthetist, Cert. Public Accountant, Dentist, Dietician, Engineer, Professional, Lawyer, Licensed Practical Nurse, Medical Doctor, LIC/CERT Unknown, Medical Doctor, Perm Foreign LIC, Medical Doctor, Perm US LIC/CERT, and Medical Doctor, Temp Foreign LIC. The 'Architect' option is highlighted. At the bottom are buttons for 'Find', 'OK', and 'Cancel'.

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

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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. ▲

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Address and Phone Information

The screenshot shows the 'Address' and 'Phones' sections of the ACT system form. The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. The 'Proposed' column has corresponding fields, with a dropdown arrow in the Address Type field. Below the 'Address' section is the 'Phones' section, which has a 'Delete' checkbox and a table with columns for 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. There are three rows in the table, and a dropdown arrow in the 'Date From' column. Below the 'Phones' section is a checkbox for 'International Address' and a 'Comments' field.

**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**.

The screenshot shows the 'Address' section of the ACT system form, with the 'Address Type' dropdown menu open. The dropdown menu is titled 'Address Types' and has a 'Find %' field. The list of address types includes: Type, Campus Primary, Campus Secondary, Campus Tertiary, Home (highlighted in blue), and Recruiting. The 'Home' option is selected. The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. The 'Proposed' column has corresponding fields, with a dropdown arrow in the Address Type field. Below the 'Address' section is the 'Phones' section, which has a 'Delete' checkbox and a table with columns for 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. There are three rows in the table, and a dropdown arrow in the 'Date From' column. Below the 'Phones' section is a checkbox for 'International Address' and a 'Comments' field.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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.

| Address       |  | End Date Current         | Proposed                             |
|---------------|--|--------------------------|--------------------------------------|
| Address Type  |  | <input type="checkbox"/> | Campus Primary                       |
| Building      |  |                          | NP                                   |
| Room          |  |                          |                                      |
| Address Line3 |  |                          | NORTH PAVILION UNIVERSITY OF ALABAMA |

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

**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.

The screenshot shows the 'Address' section of a form. It has two main columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' column has a dropdown for Campus Primary, and fields for NP, 5771, NORTH PAVILION UNIVERSITY OF ALABAMA, Birmingham, AL, 35294, and 6950. A note at the bottom right says 'Use the down arrow to create multiple records.'

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

The screenshot shows the 'Phones' section of a form. It has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. The 'Type' column is highlighted in yellow. A black arrow points to the 'Type' field. A note at the bottom says 'Use the down arrow to create multiple records.'

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.

The screenshot shows the 'Phones' section of a form. It has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. The 'Type' column is highlighted in yellow and contains the text 'Home'. The 'Phone Number (xxxxxxxx)' column is highlighted in yellow and contains the text '(205) 555-7777'. The 'Date From' column contains the text '01-AUG-2014'.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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**.



| Phones                                  | Type           | Phone Number (xxxxxxxx) | Date From   |
|---|----------------|-------------------------|-------------|
| <input type="checkbox"/> Delete Current | Home           | (205) 555-7777          | 01-AUG-2014 |
| <input type="checkbox"/>                | Campus Primary | (205) 934-5555          | 01-AUG-2014 |
| <input type="checkbox"/>                |                |                         |             |

Use the down arrow to create multiple records.

**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.

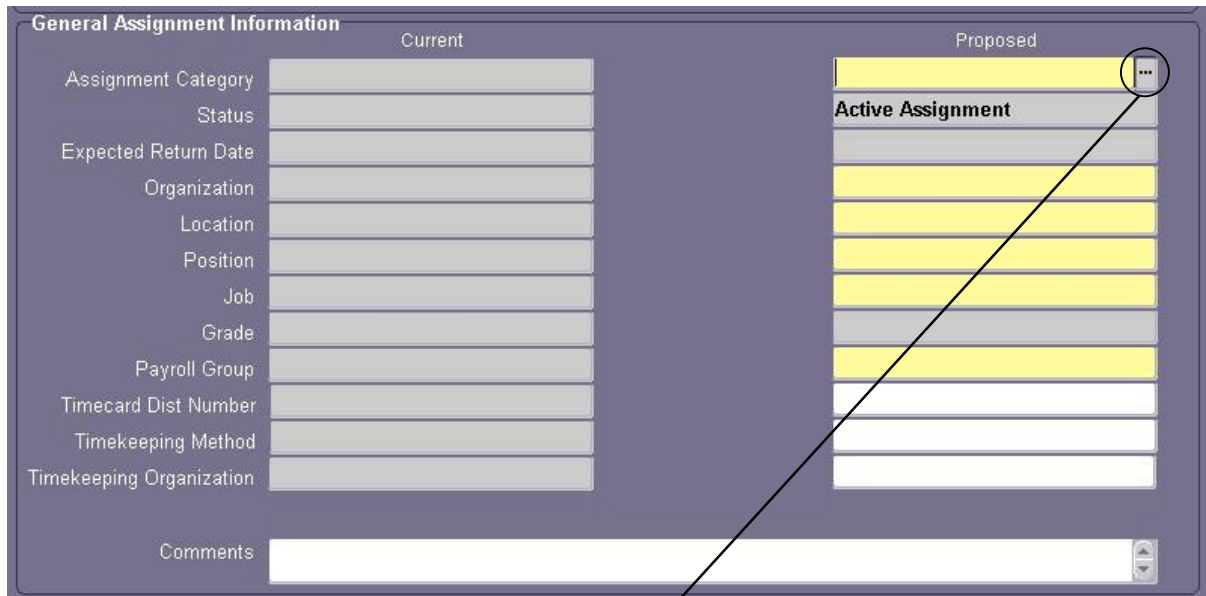
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## Appoint, Change and Terminate (ACT) Documentation


### New Hire: Submitting a New Hire Document

#### 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.



## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

| General Assignment Information   |                                  |
|--|----------------------------------|
| Current  | Proposed                         |
| Assignment Category  | 04 Irregular                     |
| Status   | Active Assignment                |
| Expected Return Date   |                                  |
| Organization   | 340000000 School of Nursing Dear |
| Location   | Bham Main Campus                 |
| Position   | 340000000.00206.110615           |
| Job  | FF217E3.Financial Officer III    |
| Grade  | W.G18                            |
| Payroll Group  | Staff 12                         |
| Timecard Dist Number   |                                  |
| Timekeeping Method   |                                  |
| Timekeeping Organization   |                                  |
| Supervisor Name  |                                  |
| Supervisor Assignment #  |                                  |
| Comments <input style="width: 90%;" type="text"/>  |                                  |
| <input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/> |                                  |

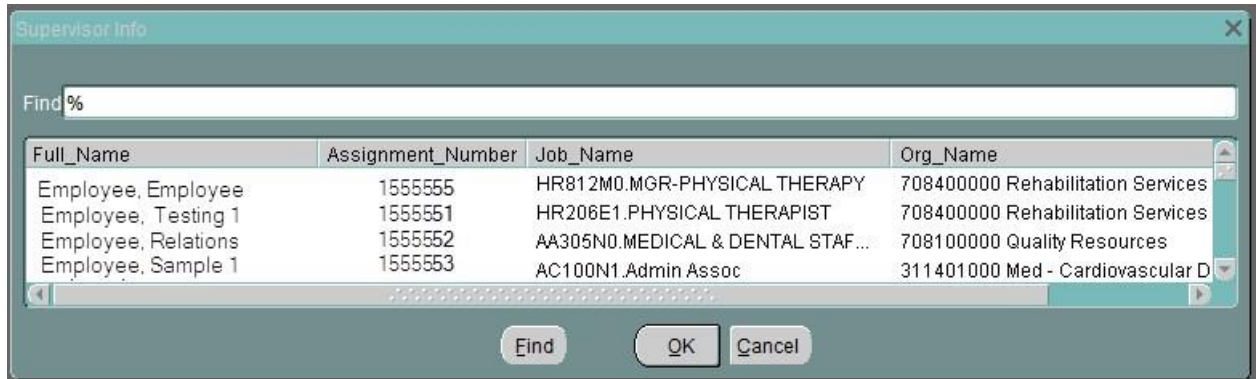
4. Click in the **POSITION** field, select the **position code** from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization - both vacant and filled. By entering the correct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

| General Assignment Information |                   |
|--------------------------------|-------------------|
| Current                        | Proposed          |
| Assignment Category            |                   |
| Status                         | Active Assignment |
| Expected Return Date           |                   |
| Organization                   |                   |
| Location                       |                   |
| Position                       |                   |
| Job                            |                   |
| Grade                          |                   |
| Payroll Group                  |                   |
| Timecard Dist Number           |                   |
| Timekeeping Method             |                   |
| Timekeeping Organization       |                   |
| Supervisor Name                |                   |
| Supervisor Assignment #        |                   |

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.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document



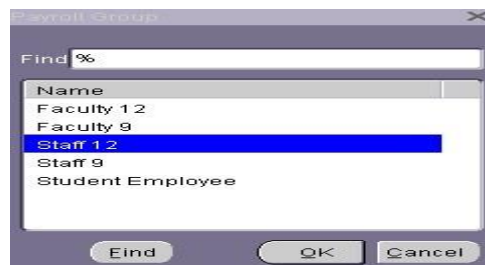
Supervisor Info

Find %

| Full_Name           | Assignment_Number | Job_Name                         | Org_Name                          |
|---------------------|-------------------|----------------------------------|-----------------------------------|
| Employee, Employee  | 1555555           | HR812M0.MGR-PHYSICAL THERAPY     | 708400000 Rehabilitation Services |
| Employee, Testing 1 | 1555551           | HR208E1.PHYSICAL THERAPIST       | 708400000 Rehabilitation Services |
| Employee, Relations | 1555552           | AA305N0.MEDICAL & DENTAL STAF... | 708100000 Quality Resources       |
| Employee, Sample 1  | 1555553           | AC100N1.Admin Assoc              | 311401000 Med - Cardiovascular D  |

Find OK Cancel

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



Payroll Group

Find %

| Name             |
|------------------|
| Faculty 12       |
| Faculty 9        |
| <b>Staff 12</b>  |
| Staff 9          |
| Student Employee |

Find OK Cancel

**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.
- 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.
  - 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.
  - 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.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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

The screenshot shows a web form titled "General Assignment Information". It is divided into two main sections: "Current" and "Proposed". The "Current" section has fields for Assignment Category, Status, Expected Return Date, Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, and Timekeeping Organization. The "Proposed" section has fields for Assignment Category (01 Regular FT), Status (Active Assignment), Organization (329800000 Periodontology), Location (Bham Main Campus), Position (329800000.86301.031001), Job (HD030N0.Dental Hygienist), Grade (W.G12), Payroll Group (Staff 12), Timecard Dist Number, Timekeeping Method (TEL), and Timekeeping Organization. At the bottom of the form, there is a "Comments" text area and two buttons: "Return to Previous Form" and "Save".

| Current                  | Proposed                 |
|--------------------------|--------------------------|
| Assignment Category      | 01 Regular FT            |
| Status                   | Active Assignment        |
| Expected Return Date     |                          |
| Organization             | 329800000 Periodontology |
| Location                 | Bham Main Campus         |
| Position                 | 329800000.86301.031001   |
| Job                      | HD030N0.Dental Hygienist |
| Grade                    | W.G12                    |
| Payroll Group            | Staff 12                 |
| Timecard Dist Number     |                          |
| Timekeeping Method       | TEL                      |
| Timekeeping Organization |                          |

Comments:

Return to Previous Form Save

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.

---

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### 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.

| Component Reasons                              |        |              |          |
|--|--------|--------------|----------|
|  | Reason | Change Value | Change % |
|  |        |              |          |
|  |        |              |          |
| Use the down arrow to create multiple records. |        |              |          |

|                               | Current | Proposed |
|-------------------------------|---------|----------|
| Projected Assignment Salary   |         |          |
| Actual Assignment Rate of Pay |         |          |
| FTE                           |         |          |
| Hosp Calc Code                |         |          |
| Premium Plan                  |         |          |
| Salary Basis                  |         | HOURLY   |
| Payroll                       |         | Biweekly |
| Outside Income Source         |         |          |
| Outside Income                |         | (Annual) |
| CFB Code                      |         |          |
| Comments                      |         |          |

Return to Previous Form      Save

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

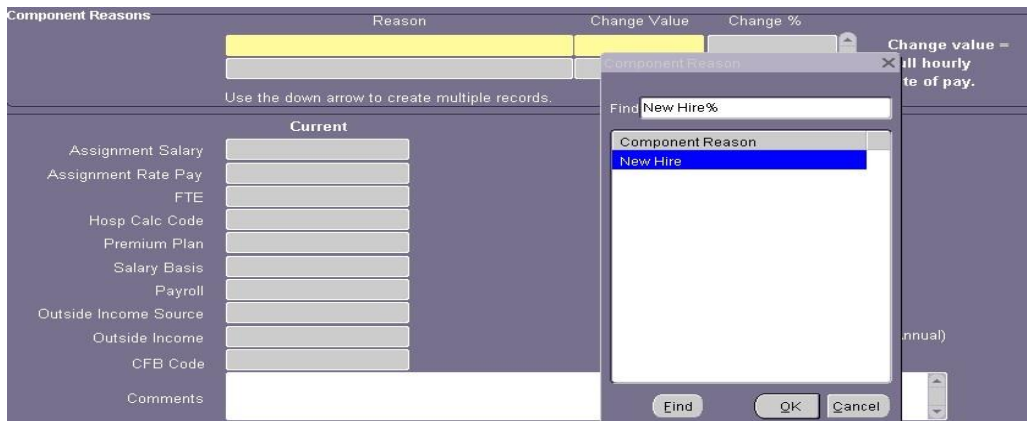
## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document



A dialog box titled "Select Salary Basis" with a search field labeled "Find %". Below the search field is a list box containing "Salary Basis", "Hourly", and "Salary". The "Hourly" option is selected and highlighted in blue. At the bottom of the dialog are three buttons: "End", "OK", and "Cancel".

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**.



The "Component Reasons" form is shown. The "Reason" and "Change Value" fields are highlighted in yellow. A list of component reasons is visible on the left, including "Assignment Salary", "Assignment Rate Pay", "FTE", "Hosp Calc Code", "Premium Plan", "Salary Basis", "Payroll", "Outside Income Source", "Outside Income", "CFB Code", and "Comments". A pop-up window titled "Component Reason" is open, showing a search field with "New Hire%" and a list box with "New Hire" selected. The "Change value =" field on the right is also visible.

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**.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

**Note: There are only two outside income sources -- VA and Eye Foundation.**

- Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
- Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

| Component Reasons                              |          |              |          |
|--|----------|--------------|----------|
|  | Reason   | Change Value | Change % |
|  | New Hire | 15.00        |          |
| Use the down arrow to create multiple records. |          |              |          |

|                               | Current | Proposed  |
|-------------------------------|---------|-----------|
| Projected Assignment Salary   |         | 31,200.00 |
| Actual Assignment Rate of Pay |         | 15.00     |
| FTE                           |         | 1.00      |
| Hosp Calc Code                |         |           |
| Premium Plan                  |         | NA        |
| Salary Basis                  |         | HOURLY    |
| Payroll                       |         | Biweekly  |
| Outside Income Source         |         |           |
| Outside Income                |         | (Annual)  |
| CFB Code                      |         | GROUP C   |
| Comments                      |         |           |

Return to Previous Form      Save

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

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Labor Sources Form Information

#### Entering General Ledger (GL) Information

The screenshot shows the 'Costing' form. At the top, 'Projected Assignment Salary' is 31,200.00 and 'Element Name' is a dropdown. Below is a table with columns: Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. There are five rows. At the bottom right, 'Total LD %' is .00. Below the table is a 'Comments:' section with a text area. At the bottom are 'Return to Previous Form' and 'Save' buttons.

1. Click on the **GL CODE** LOV. This opens the **UAB\_AKF FIND** window.

The screenshot shows the 'UAB\_AKF FIND' window. It has a title bar with a red icon and 'UAB\_AKF'. Below is an 'ALIAS' field with a dropdown arrow. Below that is a horizontal scrollbar. At the bottom are 'OK', 'Cancel', 'Clear', and 'Help' buttons.

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.

The screenshot shows the 'UAB\_AKF' window after selection. It has a title bar with a red icon and 'UAB\_AKF'. Below are several fields: 'ACCOUNT' (2101564), 'SUBACCOUNT' (000), 'BALANCING' (122000000), 'ORGANIZATION' (213005000), 'FUTURE' (0000), and 'OBJECT' (empty). To the right of each field is a label: 'UNIVERSITY REGISTRAR', 'DEFAULT SUBACCOUNT', 'PROV ADMIN GEN OPER FDS', 'UNIVERSITY REGISTRAR', 'DEFAULT', and an empty field. At the bottom are 'OK', 'Cancel', 'Combinations', 'Clear', and 'Help' buttons.



## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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

- 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.

The screenshot shows the 'Costing' section of the ACT form. At the top, 'Projected Assignment Salary' is 61,200.00 and 'Element Name' is a dropdown. Below is a table with columns: Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The first row has '01-AUG-2014' in From Date, '2101564.000.122000000.213005000' in GL Code, and '100.00' in the % column. Below the table is a 'Comments' field. To the right of the comments is a 'Total LD %' field with a value of '100.00', highlighted in yellow with a red arrow pointing to it. At the bottom are 'Return to Previous Form' and 'Save' buttons.

| Current LD               | Stop                     | Effective Date | GL Code | Project | Task | Award | Exp Or | %      |
|--------------------------|--------------------------|----------------|---------|---------|------|-------|--------|--------|
|                          |                          | From Date      | To Date |         |      |       |        |        |
| <input type="checkbox"/> | <input type="checkbox"/> | 01-AUG-2014    |         |         |      |       |        | 100.00 |
| <input type="checkbox"/> | <input type="checkbox"/> |                |         |         |      |       |        |        |
| <input type="checkbox"/> | <input type="checkbox"/> |                |         |         |      |       |        |        |
| <input type="checkbox"/> | <input type="checkbox"/> |                |         |         |      |       |        |        |
| <input type="checkbox"/> | <input type="checkbox"/> |                |         |         |      |       |        |        |

Comments:

Total LD % 100.00

Return to Previous Form Save

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

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

#### Entering Grant (GA) Funding Sources

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

The screenshot shows the 'Costing' section of the ACT form. At the top, 'Projected Assignment Salary' is 61,200.00 and 'Element Name' is empty. Below is a table with columns: LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The first row has '01-AUG-2014' in From Date, '2101564.000.122000000.213005000' in GL Code, and '100.00' in the % column. A red arrow points to the 'Project' field in the first 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**.

The screenshot shows the 'Costing' section with two rows of data. The first row has '01-AUG-2014' in From Date, '2101564.000.122000000.213005000' in GL Code, and '50.00' in the % column. The second row has '01-AUG-2014' in From Date, '31-DEC-2016' in To Date, and '50.00' in the % column. At the bottom, the 'Total LD %' is 100.00, highlighted in yellow. A red arrow points to the 'Total LD %' field.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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

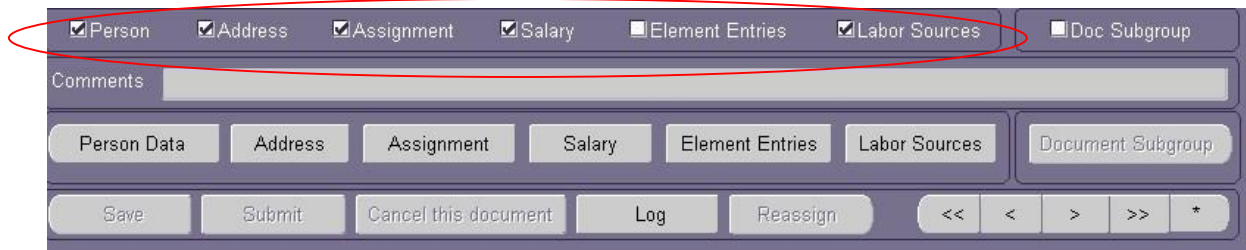
- Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM**.

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.

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#### Submitting a Complete New Hire Document

- 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.*

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

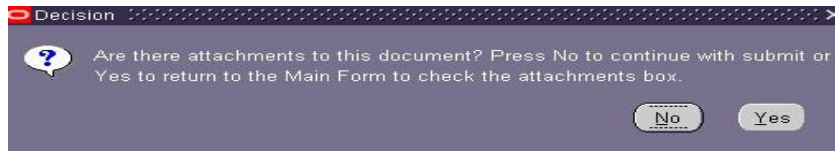


- Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**
- Click the **SUBMIT** button.

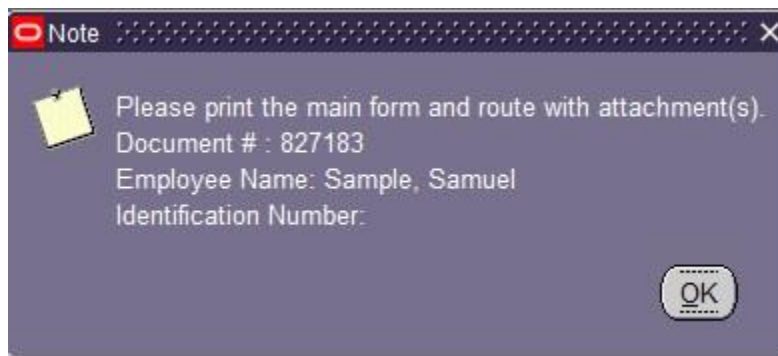
## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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).



**\*\*\*\* BE SURE TO RECORD YOUR DOCUMENT NUMBER BEFORE YOU EXIT THE NEW HIRE DOCUMENT.** 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**.

## Appoint, Change and Terminate (ACT) Documentation

### New Hire: Submitting a New Hire Document

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.](#)

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