

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

The **NEW TRAINEE AWARD** ACT document is completed by the HR Officer to **appoint** all **new trainees** who have **never** been affiliated with UAB in an active trainee or employee status.

The information entered on the **New Trainee Award** ACT document provides the data needed for a trainee 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 it is completed in sequential order.

For additional Student Trainee information, go to Financial Affairs webpage. [Click here.](#)

Instructions for completing each individual form on the **NEW TRAINEE AWARD** ACT document can be accessed by scrolling to the referenced page number or by clicking on the description.

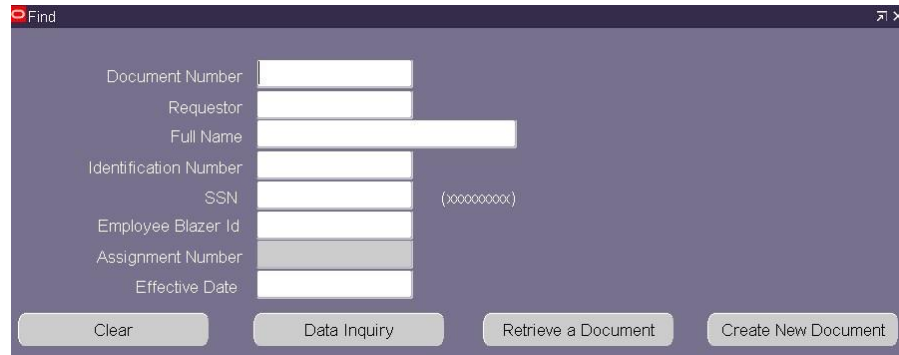
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Creating a New Trainee Award

UAB HR Officer → HR Transactions → ACT → Find Window

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. Choose **New Trainee Award**, click **OK**. Once you click OK you will be directed back to the **ACT MAIN FORM**.
5. Enter the **Effective Date** in the **EFFECTIVE DATE** field. **Note: This date cannot be changed once you have submitted the document, Verify you have entered the correct hire date.** Use the calendar **LOV** or type in the desired date using the **DD-MMMYY** Format.



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6. Click **ATTACHMENTS** box to indicate attachments *will be* accompanying the new hire document. **For list of Attachments to accompany a New Trainee Award, [click here](#).**



ACT Main Form

Document Reason	NEW TRAINEE AWARD
Effective Date	01-APR-2011
Requestor Name	HALEY
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received

7. Click **SAVE**. The system will assign a **Document Number** and the **DOCUMENT STATUS** is **OPEN**. **The document reason and/or effective date CANNOT be changed once the Document Number is created.**



ACT Main Form

Document Reason	NEW TRAINEE AWARD	Document Number	538704
Effective Date	01-APR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

BE SURE TO RECORD YOUR DOCUMENT NUMBER BEFORE YOU EXIT THE NEW TRAINEE AWARD. You will not be able to locate the new employee by their name, Social Security number, or employee ID number until the document has reached a **COMPLETE** status.

8. Click the **PERSON DATA** button located at the bottom of the **ACT MAIN FORM**.



Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

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

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The Person Data screen contains the demographic information and other employee data that is grouped into five subforms and two buttons on the ACT form. The subforms to be completed on a New Trainee Award document are Personal, Employment, Directory, License and Termination if a there is a known termination date. The two related buttons contain Address and Schools and Colleges data. Instructions for each subform and each button are listed separately.

Entering Person Data

1. Click on the **PERSON DATA** tab at the bottom of the **ACT MAIN FORM**.

The screenshot shows the 'ACT Main Form' window. At the top, there are fields for 'Document Reason' (NEW TRAINEE AWARD), 'Effective Date' (01-APR-2011), 'Requestor Name' (HALEY), 'Document Number' (538704), 'Document Status' (OPEN), 'Workflow Type' (HIRE), and 'Submit Date'. Below these are checkboxes for 'Attachments' and 'Received'. 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 'Prior UAB Service'. The 'Assignment Data' section contains fields for 'Assignment Number', 'Assignment Category', 'Job', 'FTE', 'Projected Assignment Salary', 'Assignment Status', 'Organization', 'Position', 'Primary', and 'Payroll'. At the bottom, there are tabs for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. A 'Comments' field is also present. At the very bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

2. The **PERSON DATA SCREEN** opens. Required fields are yellow and must be completed before you can save the form and move on.

The screenshot shows the 'PERSON DATA' screen with tabs for 'Personal', 'Employment', 'Phonebook', 'License', 'Termination', 'Schools and Colleges', and 'Colleges'. The 'Current' section has fields for 'SSN', 'Last Name', 'First Name', 'Middle Names', 'Suffix', 'Title', 'Date Of Birth', and 'Gender'. The 'Proposed' section has corresponding yellow-highlighted fields for 'SSN', 'Last Name', 'First Name', 'Middle Names', 'Suffix', 'Title', 'Date Of Birth', and 'Gender'.

3. Enter the **employee's Social Security number** in the **SSN** field; do not enter dashes. Press **TAB** or click in the next field.
4. 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

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letters of all names are to be capitalized; REMAINING letters are to be lower case.

Press **TAB** or click in the next field.

5. Enter the **employee's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
6. Enter the **employee's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
7. Enter the **employee's suffix**, in the **SUFFIX** field if applicable. Example: Sr., Jr., III, etc. Press **TAB** or click in the next field.
8. 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.
9. Click once in the **DATE OF BIRTH** Field. Enter the **employee's birth date** using the **DDMMYY** format.
9. Click the **SAVE** button at the bottom of the screen; the screen will move to the **EMPLOYMENT** Tab.

	Current	Proposed
SSN		111-22-3333
Last Name		Example
First Name		Three
Middle Names		
Suffix		
Title		Mr.
Date Of Birth		14-JUL-1980
Gender		MALE

Comments:

Address Return to Previous Form Save

Entering Employment Information

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1. Click on the **LOV** in proposed **ETHNIC ORIGIN** field and select the *employee's correct ethnic origin*. Click **OK**.

NOTE: Trainees have the ability to change their ethnic origin 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**.

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1. 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: Yes, No, and Not Required - Trainee. Individuals who are considered to be a Trainee are not required to complete an I-9.

The screenshot shows a dropdown menu titled "I-9 Status" with a search bar at the top. 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 bottom of the menu are three buttons: "Find", "OK", and "Cancel".

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

The screenshot shows the ACT form with several tabs: "Personal", "Employment", "Phonebook", "License", "Termination", and "Schools and Colleges". The "Employment" tab is active. On the left, there are fields for "Ethnic Origin", "Veteran Status 100", "Veteran Status 100A", "I-9 Status", "Visa Type", and "Work Visa Expiration Date". To the right of these fields are two columns: "Current" and "Proposed". The "Proposed" column has a dropdown menu open, showing four options: "Asian", "Not a Veteran", "Not Required - Trainee", and "US Citizen". The "Not Required - Trainee" option is highlighted in yellow. To the right of the "Proposed" column is a button labeled "More info on Veteran Status".

- a. If the individual 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 individual 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 International Scholars Services (ISS) webpage.

[Click here.](#)

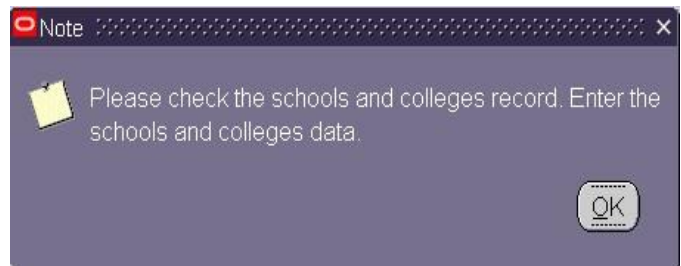
The screenshot shows a dropdown menu titled "Visa Type" with a search bar at the top. The menu is open, displaying a list of visa types: "B-1 Visitor for Business", "B-2 Visitor for Pleasure", "EAC Employment Authorization", "F-1 Student", "H-1 Work Visa", "J-1 Work Visa - Can Be A Student", "O-1 Outstanding Specialty", "PR Permanent Resident", "TN Canadian Employee", "US Citizen", "VWB Visa Waiver Business", "VWT 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 bottom of the menu are three buttons: "Find", "OK", and "Cancel".

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Personal	Employment	Phonebook	License	Termination	Schools and Colleges
<div style="display: flex; justify-content: space-between;"> <div>Current</div> <div>Proposed</div> </div>					
Ethnic Origin		Asian			
Veteran Status 100		Not a Veteran			
Veteran Status 100A		Not Required - Trainee			
I-9 Status		US Citizen			
Visa Type		01-JUL-2013			
Work Visa Expiration Date					

- 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.

- Click the **SAVE** button at the bottom of the screen; the **NOTE** to the right will display.
- Click **OK** and proceed to enter the Schools and Colleges Information.



Entering Schools and Colleges Information

- To enter the trainee's educational information, click the **SCHOOLS AND COLLEGES** tab.

Personal	Employment	Phonebook	License	Termination	Schools and Colleges																																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">School or College</th> <th style="text-align: left; padding: 2px;">Degree Name</th> <th style="text-align: left; padding: 2px;">Degree Date</th> <th style="text-align: left; padding: 2px;">Type</th> <th style="text-align: left; padding: 2px;">Transcript/Official Documentation on File</th> <th style="text-align: left; padding: 2px;">Degree Discipline</th> </tr> </thead> <tbody> <tr style="background-color: yellow;"> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>						School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline																														
School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline																																				

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

Person Data (Create New Document)

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

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

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: [Text Box]

Address Return to Previous Form Save

Person Data (Create New Document)

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

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

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

Find %Panama%

Location

- Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh

Find OK Cancel

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- 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'. A dropdown menu is open for the 'School or College' field, displaying a list of institutions in Panama. The 'Find' button is highlighted.

Country	School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
Panama	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					

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

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The screenshot shows the 'Schools and Colleges' tab of the ACT Documentation New Trainee Award form. The form contains a table with the following columns: School or College, Degree Name, Degree Date, Type, Transcript/Official Documentation on File, and Degree Discipline. The first row is populated with 'University of Alabama at Birmingham', '430 Bachelor of Engineering', '20-MAY-020', 'HD', and empty fields for the last two columns. Below the table is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	430 Bachelor of Engineering	20-MAY-020	HD		

Comments:

6. Repeat the above steps, as necessary, until all degrees are entered. Use the down arrow on the keyboard to create multiple records if necessary.
7. Click the **SAVE** button; then click on **PHONEBOOK** tab to proceed with enter the trainee's phonebook information.

Entering Phonebook Information

Click on the **PHONEBOOK** tab located on the **PERSON DATA FORM**

The screenshot shows the 'Phonebook' tab of the ACT Documentation New Trainee Award form. The form is titled 'Data used for the UAB Electronic Directory' and is divided into two columns: 'Current' and 'Proposed'. The 'Current' column has four input fields for 'Individual Online List', 'Online Job Title', 'Online Display Name', and 'Faculty and Staff List'. The 'Proposed' column has three input fields for the same categories, with the first field pre-filled with 'Yes'. To the right of the 'Proposed' fields is a checkbox labeled 'Assignment Job Title (Last Name, First Name)' with a note '*** Please do not add suffix'. Below the form is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

Data used for the UAB Electronic Directory	
Current	Proposed
Individual Online List	Yes
Online Job Title	
Online Display Name	
Faculty and Staff List	

☐ Assignment Job Title (Last Name, First Name)
*** Please do not add suffix

Comments:

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

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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.
6. Proceed onto the **LICENSE** tab or **TERMINATION** tab if applicable.

Entering License, Certification, Membership Information

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

The screenshot shows a web form with tabs at the top: Personal, Employment, Phonebook, License (selected), Termination, and Schools and Colleges. The main section is titled 'License/Certificate/Membership Information' and is divided into two columns: 'Current' and 'Proposed'. Each column has four input fields: 'Type', 'Title', 'Number', and 'Expiration Date'. The 'Type' field in the 'Proposed' column has a dropdown arrow. Below the input fields, a note says 'Use down arrow to create multiple records.' At the bottom of the form, there 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.**

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Name
Certification
License
Membership
Professional Competency Certification

- If you select **License**, a screen listing of **LICENSE TITLES** appears. Select the appropriate **License title**, Click **OK**.

License Title

Find %

License Title
Architect
Cert. Nurse Anesthetist
Cert. Public Accountant
Dentist
Dietician
Engineer, Professional
Lawyer
Licensed Practical Nurse
Medical Doctor, LIC/CERT Unknown
Medical Doctor, Perm Foreign L/C
Medical Doctor, Perm US LIC/CERT
Medical Doctor, Temp Foreign L/C

Find OK Cancel

- If you select **Certification, Membership or Professional Competency**, you will need to type **the appropriate title** in the **TITLE** field.
- Type the **License Number** in the **NUMBER** field, if applicable.
- 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.**

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

License/Certificate/Membership Information

	Current	Proposed
Type		License
Title		Engineer, Professional
Number		12345
Expiration Date		31-DEC-2012

Use down arrow to create multiple records.

- Click **SAVE** at the bottom of the screen; click the **TERMINATION** tab.

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Entering Termination Information

The **Termination** tab is completed in a **NEW TRAINEE AWARD** Document **only** when you are entering a new trainee with a **known termination date** from the beginning of their time at UAB.

1. Click on the **TERMINATION** tab.

	Current	Proposed
Actual Date	<input type="text"/>	<input type="text"/>
Projected Last Day	<input type="text"/>	<input type="text"/>
Leaving Reason	<input type="text"/>	<input type="text"/>
Rehire Recommendation	<input type="text"/>	<input type="text"/>
Recommendation Reason	<input type="text"/>	<input type="text"/>

Comments

2. Click in the **PROJECTED LAST DAY OF WORK** field; enter the **Projected Last Day of Work** from the Calendar LOV or Type the date in the field, using the **ddmmmyy** format.
3. Click the **SAVE** button at the bottom of the form; click the **ADDRESS** button at the bottom of the screen.

Entering Address and Phone Information

Note: All trainees must have a local (US) address and/or campus address in order to receive correspondence. Employee's 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.

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Address		Current	End Date	Current	Proposed
Address Type			<input type="checkbox"/>		
Address Line1					
Address Line2					
Address Line3					
City					
State					
Zip Code					
Use the down arrow to create multiple records.					

Phones		Type	Phone Number (xxxxxxxx)	Date From
Delete	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
Use the down arrow to create multiple records.				

<input type="checkbox"/> International Address	
Comments	

Return to Previous Form
Save

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

Address		Current	End Date	Current	Proposed
Address Type			<input type="checkbox"/>		Home
Address Line1					
Address Line2					
Address Line3					
City					
State					
Zip Code					
Use the down arrow to create multiple records.					

2. Enter the **trainee'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.

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City	State	Zip Start	Zip End	County
Hoover	AL	35023	35023	Jefferson
Hoover	AL	35023	35023	Shelby
Hoover	AL	35080	35080	Jefferson
Hoover	AL	35080	35080	Shelby
Hoover	AL	35214	35214	Jefferson
Hoover	AL	35214	35214	Shelby
Hoover	AL	35216	35216	Jefferson
Hoover	AL	35216	35216	Shelby
Hoover	AL	35226	35226	Jefferson
Hoover	AL	35226	35226	Shelby
Hoover	AL	35236	35236	Jefferson
Hoover	AL	35236	35236	Shelby
Hoover	AL	35242	35244	Jefferson

End OK Cancel

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**.

Current		End Date	Current	Proposed
Address Type		<input type="checkbox"/>		Home
Address Line1				456 Wildwood Circle
Address Line2				
Address Line3				
City				Birmingham
State				AL
Zip Code				35200 -

Use the down arrow to create multiple records.

Note: If the trainee has an international address and phone number, check the **International Address** checkbox. The **Comments** box will turn yellow indicating that it is now a required field. Enter the international address and phone number in the **Comments** box. The **Campus Address** should be entered as **Home** in the **Address Type** field. The **Department name** on **Address Line 1**, **Street Address** on **Address Line 2** and the **building and room number** on **Address Line 3**.

☒ International Address

Comments

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.

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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 VH, 456, VOLKER HALL, Birmingham, AL, and 35294 - 4564. A checkbox labeled 'End Date Current' is between the columns. A note at the bottom right says 'Use the down arrow to create multiple records.'

12. To enter phone numbers for a trainee 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 four columns: 'Delete', 'Current', 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. The first row has a dropdown for Type, a field for Phone Number, and a field for Date From. There are three empty rows below. 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 **trainee's ten digit home phone number** in the **PHONE NUMBER** field without dashes.

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The screenshot shows a form titled "Phones" with a table containing one record. The table has four columns: "Delete Current", "Type", "Phone Number (xxxxxxxx)", and "Date From". The first row has checkboxes for "Delete" and "Current", the value "Home" in the Type column, the number "(205) 645-1234" in the Phone Number column, and the date "01-OCT-2009" in the Date From column. Below the table is a note: "Use the down arrow to create multiple records."

Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Home	(205) 645-1234	01-OCT-2009

Use the down arrow to create multiple records.

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**.

The screenshot shows the same "Phones" form but with two records. The second row has the value "Campus Primary" in the Type column, the number "(205) 934-5644" in the Phone Number column, and the date "01-OCT-2009" in the Date From column. The note "Use the down arrow to create multiple records." is still present at the bottom.

Delete Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Home	(205) 645-1234	01-OCT-2009
<input type="checkbox"/>	Campus Primary	(205) 934-5644	01-OCT-2009

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 on **RETURN TO PREVIOUS** to return to the **PERSON DATA** form.
The information on the Assignment screen identifies the trainee's assignment category, the organization and position number the trainee is affiliated with, and the timekeeping organization.

Entering Assignment Information

1. Click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**. This will open the **ASSIGNMENT** form.

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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			
Comments			

Return to Previous Form
Save

- Select the **appropriate assignment category** from the **ASSIGNMENT CATEGORY LOV**. This can only be **06 Student** or **20 Post Doc Trainee**. Click **OK**.

Note: When the **06 Student** assignment category is selected, return to the **Person Data Form** and enter the student's **Blazer ID** in the required **BLAZER ID** field.

Assignment Categories
✕

Employment Category

06 Student

20 Post Doc Trainee

Find
OK
Cancel

Personal		Current	Proposed	
SSN			111-22-3333	SSN
Last Name			Example	
First Name			Three	
Middle Names				
Suffix				
Title			Mr.	
Date Of Birth			14-JUL-1980	
Gender			MALE	Blazer ID

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- 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.

- 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, **GRADE** field and **PAYROLL GROUP** will be auto populated.

Assignment (Create New Document)

Full Name	Example, Three	Document Reason	NEW TRAINEE AWARD
Identification Number		Document Number	538704
Assignment Number		Document Status	OPEN
		Effective Date	01-APR-2011

Effective Date From		Shift Differential Code	NA
Effective Date To		Grandparented	
Primary		Effort Report Eligible	

General Assignment Information

Current	Proposed
Assignment Category	06 Student
Status	Active Assignment
Expected Return Date	
Organization	442000000 Biomedical Engineering
Location	Bham Main Campus
Position	442000000.00001.031001
Job	ZZZ8.Graduate Student Trainee
Grade	O.010
Payroll Group	Non Employee
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	

Comments

Return to Previous Form Save

Appoint, Change and Terminate (ACT) Documentation

New Trainee Award

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

The screenshot shows a form titled "General Assignment Information" with two main columns: "Current" and "Proposed". The "Current" column contains fields for Assignment Category, Status, Expected Return Date, Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, Timekeeping Organization, Supervisor Name, and Supervisor Assignment #. The "Proposed" column contains a dropdown menu for "Active Assignment" and several empty fields for other assignment details.

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.

The screenshot shows a "Supervisor Info" window with a "Find %" search bar. Below the search bar is a table with the following data:

Full_Name	Assignment_Number	Job_Name	Org_Name
Employee, Employee	155555	HR812M0.MGR-PHYSICAL THERAPY	708400000 Rehabilitation Services
Employee, Testing 1	155551	HR206E1.PHYSICAL THERAPIST	708400000 Rehabilitation Services
Employee, Relations	155552	AA305N0.MEDICAL & DENTAL STAF...	708100000 Quality Resources
Employee, Sample 1	155553	AC100N1.Admin Assoc	311401000 Med - Cardiovascular D

At the bottom of the window are buttons for "Find", "OK", and "Cancel".

- Click the **SAVE** button at the bottom of the form; click on **THE RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

The Salary information should be completed before entering the Labor Sources data.

Entering Salary Information

Note: Salary Basis and Payroll fields are auto populated with Trainee. For information on processing pay for a Trainee, go to Financial Affairs webpage. [Click here.](#)

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

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

This will open the **SALARY** Screen.

2. In the **COMPONENT REASONS** section, click in the **REASON** Field, both the **REASON** and **CHANGE VALUE** are yellow required fields. Using the LOV in the Reason field select the appropriate component reason, click **OK**.

Note: Selecting the component reason **NEW AWARD** will initiate a monthly payment to the Trainee for the designated amount until an ACT document is approved to end the payment; selecting the component reason **NO RECURRING PAY** requires a **Nonrecurring Element** ACT document be processed before payment will be initiated to the trainee.

3. When **New Award** is selected as the Component Reason, click in the **CHANGE VALUE** field; enter the monthly dollar amount the trainee is to receive each month. The **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically populate.
4. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

Component Reasons			
Reason	Change Value	Change %	
New Award	2,000.00		Change v Full mont rate of av
Use the down arrow to create multiple records.			
	Current		Proposed
Projected Assignment Salary			24,000.00
Actual Assignment Rate of Pay			2,000.00
FTE			
Hosp Calc Code			
Premium Plan			NA
Salary Basis			TRAINEE
Payroll			TRAINEE
Outside Income Source			
Outside Income			
CFB Code			
Comments			
<div style="display: inline-block; margin-right: 20px;">Return to Previous Form</div> <div>Save</div>			

5. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ACT MAIN FORM**.
6. Click the **LABOR SOURCE** button at the bottom of the **ACT MAIN FORM**.

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

Entering Labor Sources

LABOR SOURCES indicate which account strings a trainee's monthly payment will be costed (charged) to. Because the GL and GA account structures are different, there are differences in entering the account string data.

Entering General Ledger (GL) Information

The screenshot shows the 'Costing' form. At the top, 'Projected Assignment Salary' is 24,000.00 and 'Element Name' is a dropdown. Below is a tabbed interface with 'Assignment' and 'Element' tabs. The 'Element' tab is active, showing 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 in the table. Below the table is a 'Comments:' text area. At the bottom right, 'Total LD %' is .00. 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 'UAB_AKF'. Below is an 'ALIAS' field with a dropdown arrow. Below the field is a horizontal scrollbar. At the bottom are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

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 trainee's funding** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

Projected Assignment Salary **24,000.00** Element Name

Costing

Assignment

Current	Effective Date			GL Code	Project	Task	Award	Exp Or	%
LD	Stop	From Date	To Date						
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2009		2100282.000.1233000000.339200000					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**

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

Appoint, Change and Terminate (ACT) Documentation New Trainee Award

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, 'Assignment Salary' is set to 30,000.00 and 'Element Name' is empty. Below this is a table with the following columns: LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The table contains four rows of data. The first row has LD 01, Stop 01, From Date 01-MAR-2008, To Date 30-JUN-2008, GL Code 2100504.000.123900000.392303000, Project 237542, Task 10.01, Award 1637542, Exp Or 10, and % 25.00. The second row has LD 01, Stop 01, From Date 01-MAR-2008, To Date 31-MAR-2009, GL Code 2100506.000.123900000.392303010, Project 223114, Task 03.05, Award 1523114, Exp Or 10, and % 25.00. The third and fourth rows are empty. At the bottom right, 'Total LD %' is 100.00. An arrow points to the 'Project' field in the first row.

LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
01	01	01-MAR-2008	2100504.000.123900000.392303000	237542	10.01	1637542	10	25.00
01	01	01-MAR-2008	2100506.000.123900000.392303010	223114	03.05	1523114	10	25.00

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.

6. Type in the **percent of the trainee's effort** to be charged to the project number in the % field.
7. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments here will appear on the **ACT MAIN FORM**.
8. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM** window.

Appoint, Change and Terminate (ACT) Documentation

New Trainee Award

Submitting a New Trainee Award

The HR Officer verifies that all information is provided and all attachments are ready to be submitted. The HR Officer submits the **NEW TRAINEE AWARD** document for approval. At that point, the document status changes from **OPEN** to **READY** and enters the approval path.

The screenshot shows the 'ACT Main Form' interface. It is divided into several sections:

- Document Information:** Document Reason (NEW TRAINEE AWARD), Effective Date (01-APR-2011), Requestor Name (HALEY), Document Number (538704), Document Status (OPEN), Workflow Type (HIRE), and Submit Date.
- Person Data:** Name (Example, Three), Gender (Male), Identification Number, SSN, Service Date (01-APR-2011), Date of Birth (14-JUL-1980), Ethnic Origin (Asian), Total Active Assignments (1), Total Projected Annual Salary (24,000.00), and Prior UAB Service (checkbox).
- Assignment Data:** Assignment Number, Assignment Category (06 Student), Job (ZZZ8.Graduate Student Trai), FTE, Projected Assignment Salary (24,000.00), Assignment Status (Active Assignment), Organization (442000000 Biomedical Engin), Position (442000000.00001.031001), Primary, and Payroll (Trainee).
- Checkboxes:** A row of checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. A red circle highlights the first five checkboxes, which are all checked.
- Comments:** A text area for comments.
- Navigation:** Buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

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

Note: A check will be inserted when **REQUIRED FIELDS** on all screens and tabs have been completed. All check boxes must be checked (excluding Element Entries) before you submit the document.

2. On the **ACTMAIN FORM**, verify a check is in the Attachments checkbox; assemble all attachments to be submitted with the document.
3. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
4. Click the **SUBMIT** button.

Updated 11-Mar-2016

Appoint, Change and Terminate (ACT) Documentation

Updated 13-OCT-2014

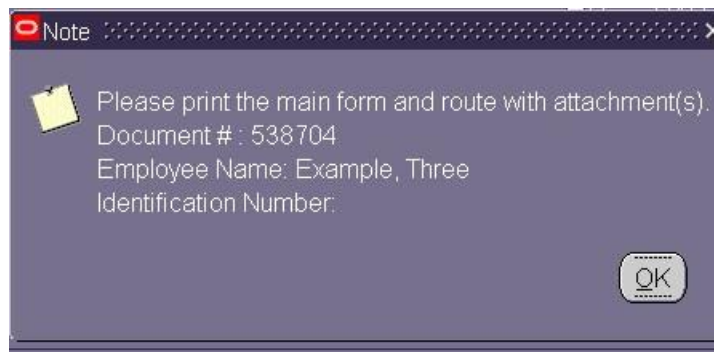
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5. If you **did not** check the **ATTACHMENTS** checkbox, you will see the following message.



6. Click **YES** to return to the **ACT MAIN FORM** and check the **ATTACHMENTS** box and resubmit.

If you **did** check the **ATTACHMENTS** checkbox, you will see the following message.



7. Click **OK** and then print the **ACT MAIN FORM** and attach to the front of attachments that are going to be sent to Central HR.

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

****** 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 Document is submitted, and the document status changes to Ready, the document has entered the Approval Path. The Document Status will change throughout the levels of Approval. Once the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.

The requestor of the **NEW TRAINEE AWARD** will receive an email notification when a trainee's **NEW TRAINEE AWARD** has reached **COMPLETE** status and an **IDENTIFICATION NUMBER** has been assigned.

11. Notify the trainee of their identification number and inform them can now set up their **Blazer ID**. For information on setting up a Blazer ID go to BlazerID Central. [Click here.](#)

[RETURN TO TOP](#)