

Appoint, Change and Terminate (ACT) Documentation


End A Trainee – Part One: Creating an End A Trainee Document

An **END A TRAINEE** Document is used when a Trainee with a 06 (Student) or 20 (Post Doctoral Trainee) Assignment Category terminates their assignment with UAB. This document reason will terminate ALL assignments held by the student or trainee.

UAB HR Officer → HR Transactions → ACT → Find Window

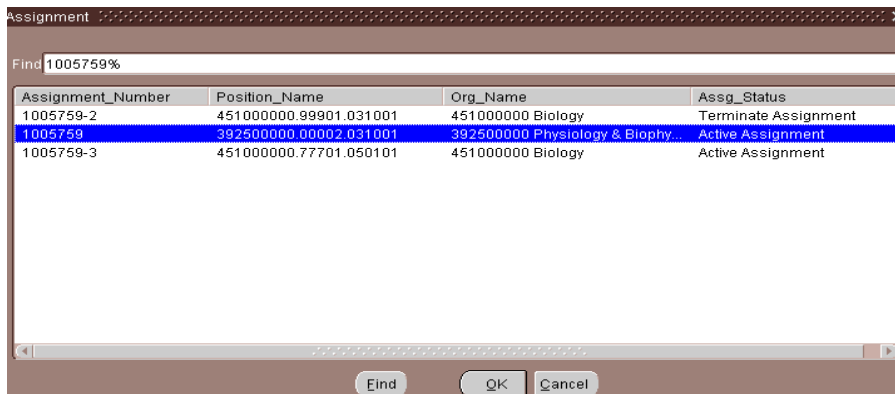
Creating an End A Trainee Document

1. Use the **FIND** Window to locate the trainee.



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

Note: After you click on the **CREATE NEW DOCUMENT** button you might see the window below. Some Trainees may have more than one assignment and could be listed several times. An End A Trainee ACT document can only be submitted on the primary trainee assignment. End A Trainee will terminate all Active assignments.



Assignment_Number	Position_Name	Org_Name	Assg_Status
1005759-2	451000000.99901.031001	451000000 Biology	Terminate Assignment
1005759	392500000.00002.031001	392500000 Physiology & Biophy...	Active Assignment
1005759-3	451000000.77701.050101	451000000 Biology	Active Assignment

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- When the **ACT MAIN FORM** opens, click once in the **DOCUMENT REASON FIELD**.

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

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

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- Click in the **EFFECTIVE DATE** field, choose an effective date from the Calendar LOV or **type in the desired date**. Remember to use the **DD-MMM-YY** format.

ACT Main Form

Document Reason	END A TRAINEE	Document Number	
Effective Date	31-MAY-2011	Document Status	
Requestor Name	HALEY	Workflow Type	
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Note: *Attachments are not required for an End A Trainee document.*

- Click on the **SAVE** button at the bottom of the form. The **ACT MAIN FORM** will display.

ACT Main Form

Document Reason	END A TRAINEE	Document Number	536188
Effective Date	31-MAY-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	TERMINATION
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data

Name	Andrews, Shiquina L	Gender	Female
Identification Number	1048500	Ethnic Origin	Black or African American
SSN		Total Active Assignments	1
Service Date	19-AUG-2008	Total Projected Annual Salary	21,000.00
Date of Birth	19-SEP-1981	<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number	1048500	Assignment Status	Active Assignment
Assignment Category	06 Student	Organization	465000000 Psychology
Job	ZZZ8.Graduate Student Trai	Position	465000000.00001.031001
FTE		Primary	Y
Projected Assignment Salary	21,000.00	Payroll	Trainee

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

Comments

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

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

Appoint, Change and Terminate (ACT) Documentation

End A Trainee – Part Two: Entering Termination Information

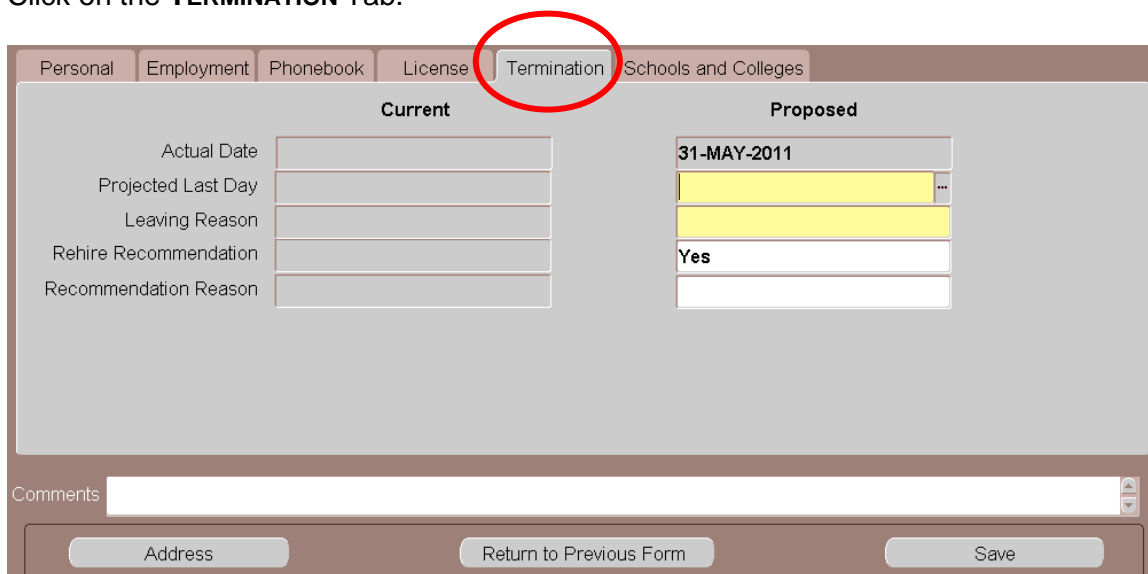
All of the buttons on the ACT Main Form will appear to be open. However, the only forms you will be allowed to edit will be the **Person Data** form (**Termination Tab ONLY**) and the **Address** form. The information on the Termination Tab identifies the Trainee's projected last day of employment, reason for terminating and rehire eligibility.

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



A horizontal navigation bar with buttons for 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. Below these are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and a set of navigation arrows (left, right, first, last, and a search icon).

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



The screenshot shows the 'Termination' tab selected and circled in red. The form is divided into 'Current' and 'Proposed' sections. The 'Current' section has fields for 'Actual Date', 'Projected Last Day', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. The 'Proposed' section has a date field showing '31-MAY-2011', a yellow dropdown menu, another yellow dropdown menu, a 'Yes' text field, and an empty text field. At the bottom, there is a 'Comments' text area and buttons for 'Address', 'Return to Previous Form', and 'Save'.

3. Click in the **PROJECTED LAST DAY OF WORK** field, choose the effective date from the Calendar LOV or type in **the desired date**.

Note: The Actual Date is pulled from the Document Effective Date. This can be a future date in order to pay the Trainee through a designated pay period. The Projected Last Day of Work will be the Trainee's actual last day of working at UAB.

4. Click in the **LEAVING REASON** field; select **400 End Trainee Award** from LOV.
5. Click in the **REHIRE RECOMMENDATION** field.
6. This field will default to **Yes**. However, if your organization would not rehire this individual, select **No** from the LOV.
7. Click in the **RECOMMENDATION REASON** field and explain why your department would not be willing to rehire this individual.

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Note: *The Rehire Recommendation applies only to your organization. It does not apply to the entire University.*

	Current	Proposed
Actual Date	<input type="text"/>	31-MAY-2011
Projected Last Day	<input type="text"/>	31-MAY-2011
Leaving Reason	<input type="text"/>	400 End Trainee Award
Rehire Recommendation	<input type="text"/>	Yes
Recommendation Reason	<input type="text"/>	<input type="text"/>

Comments

8. Click the **SAVE** button; Click **RETURN TO PREVIOUS FORM** to return to the **ACT MAIN FORM**.

Appoint, Change and Terminate (ACT) Documentation

End A Trainee – Part Four: Submitting a End A Trainee Document

The Address button only needs to be completed if the Trainee's post termination address is different from what currently shows in the Administrative Systems. It is critical that the correct address and phone information be entered for post employment communications. Tax and benefit information will need to be forwarded to the correct address.

1. If the address and/or phone information is changing, click the **ADDRESS** button at the bottom of the **ACT MAIN FORM**.
2. To change the Trainee's home information, select **HOME** from the LOV in the **ADDRESS TYPE** field.

The screenshot shows the 'Address' and 'Phones' sections of the ACT system. The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column shows 'Address Type' as 'Home', 'Address Line1' as '3806 4th Avenue South', 'City' as 'Birmingham', 'State' as 'AL', and 'Zip Code' as '35222'. The 'Proposed' column has the same 'Address Type' as 'Home' but the other fields are empty. Below the 'Address' section is the 'Phones' section, which has a table with columns: 'Delete', 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. There are two rows: one for 'Home' with phone number '(205) 253-1611' and date '01-JAN-2007', and another for 'Campus Primary' with phone number '(205) 934-3971' and date '01-JAN-2008'. At the bottom, there is a checkbox for 'International Address' and a 'Comments' text area.

3. Click in the **ADDRESS LINE1** field; enter *the Trainee's street address*. There are two more address lines available, if needed.
4. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type *the name of the city in which the Trainee lives*, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.
5. Highlight the *correct zip code range* for the city and county in which the Trainee lives. Click **OK**. This will populate the **CITY AND STATE** field.
6. Click in the **ZIP CODE** field, type the *correct Zip Code*. Click **SAVE**.

Note: If the 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.

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

☐ International Address

Comments

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

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		Campus Secondary	(205) 000-0000	01-JUL-2006
<input type="checkbox"/>		Home	(205) 253-1611	01-JAN-2007
<input type="checkbox"/>		Campus Primary	(205) 934-3971	01-JAN-2008

Use the down arrow to create multiple records.

8. Click on the home phone number in the **PHONE NUMBER** section. Enter the ***Trainee's home phone number without the dashes***. This information must be entered in ten digits.
9. Click on the home date in the **DATE FROM** section. Enter ***the effective date of the termination document***.

Delete	Current	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>		Campus Secondary	(205) 000-0000	01-JUL-2006
<input type="checkbox"/>		Home	(416) 555-9999	31-MAY-2009
<input type="checkbox"/>		Campus Primary	(205) 934-3971	01-JAN-2008

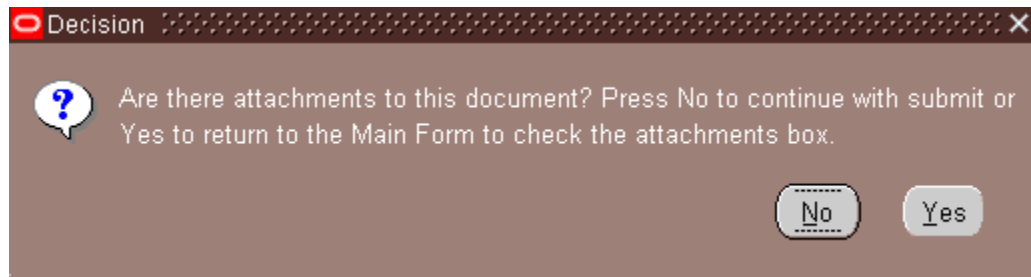
Use the down arrow to create multiple records.

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

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

The HR Officer verifies that all information is correct and the document is ready to be submitted. The HR Officer submits the Termination document for approval. At that point, the document status changes from Open to Ready and enters the approval path.

1. Before submitting the document make certain all information is correct. Click the **SUBMIT** button.
2. Once the document is submitted the following window appears.



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

A screenshot of the 'ACT Main Form' window. It displays various fields for a document. On the left, 'Document Reason' is 'END A TRAINEE', 'Effective Date' is '31-MAY-2011', and 'Requestor Name' is 'HALEY'. Below these are checkboxes for 'Attachments' and 'Received'. On the right, 'Document Number' is '536188', 'Document Status' is 'READY', 'Workflow Type' is 'TERMINATION', and 'Submit Date' is '23-MAR-2011 15:03:51'. All fields are grayed out.

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

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

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