

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.

Copy and paste link into URL:

<http://uabfinancial.infomedia.com/content.asp?id=361681>

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.

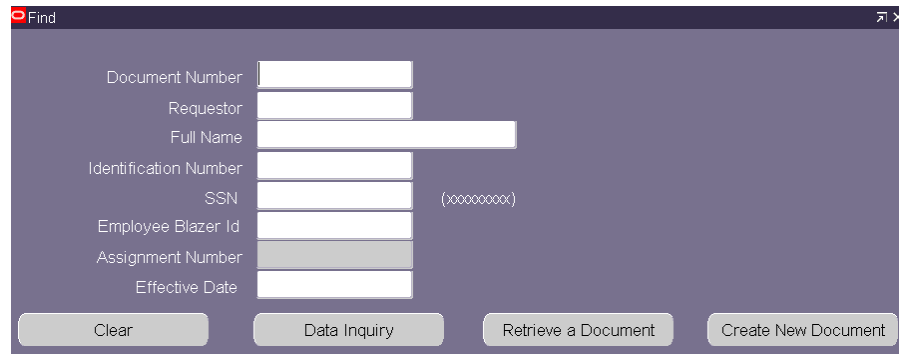
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Creating a New Trainee Award

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-MMM-YY** Format.



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](#).



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- 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.**

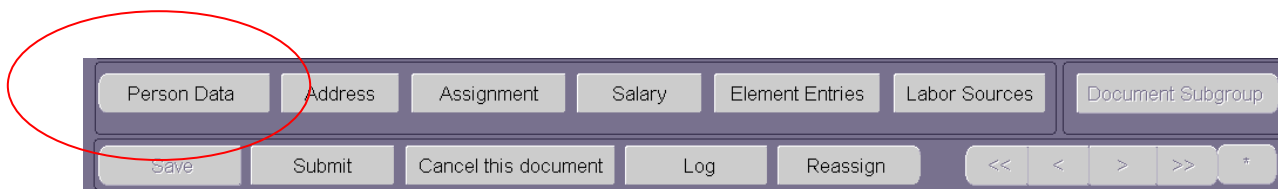


ACT Main Form

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.

- 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, and Total Projected Annual Salary. There is also a checkbox for 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 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. The 'Current' and 'Proposed' sections are visible. 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 fields, with the SSN, Last Name, First Name, Middle Names, Suffix, Title, Date Of Birth, and Gender fields highlighted in yellow to indicate they are required.

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 letters of all names are to be capitalized; REMAINING letters are to be lower case.** Press **TAB** or click in the next field.

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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 **DD-MMM-YY** 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	SSN
Last Name		Example	
First Name		Three	
Middle Names			
Suffix			
Title		Mr.	
Date Of Birth		14-JUL-1980	...
Gender		MALE	▼

Comments

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Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT system. It features two columns: 'Current' and 'Proposed'. The 'Current' column has input fields for Ethnic Origin, Veteran Status 100, Veteran Status 100A, I-9 Status, Visa Type, and Work Visa Expiration Date. The 'Proposed' column has corresponding fields, with the first five highlighted in yellow. A button labeled 'More info on Veteran Status' is located to the right of the 'Proposed' fields. At the bottom, there is a 'Comments' section with a text area and a scroll bar.

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.

The screenshot shows the 'Ethnic Origin' LOV dialog box. It has a 'Find %' search field at the top. Below it is a list of options: American Indian or Alaskan Native (highlighted), Asian, Black or African American, Hispanic or Latino, regardless of race, Native Hawaiian or Other Pacific Islander, Two or More Races, and White. At the bottom are buttons for 'Find', 'OK', and '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**.

The screenshot shows the 'Veteran Status' LOV dialog box. It has a 'Find %' search field at the top. Below it is a list of options: 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 (highlighted), Other Protected Veteran, Other Protected Veteran, AFSM, Recently Separated, Other Protected, AFSM Veteran, and Other Protected, Recently Separated Veteran. At the bottom are buttons for 'Find', 'OK', and 'Cancel'.

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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.

Copy & paste link into URL:

http://www.hrm.uab.edu/main/records/form_I9.html

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". 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 window, there 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. Under the "Current" column, there are fields for "Ethnic Origin", "Veteran Status 100", "Veteran Status 100A", "I-9 Status", "Visa Type", and "Work Visa Expiration Date". The "Proposed" column shows a dropdown menu for "Visa Type" with the following options: "Asian", "Not a Veteran", "Not Required - Trainee", and "US Citizen". A button labeled "More info on Veteran Status" is located to the right of the "Proposed" column.

- 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.

Copy and paste link into URL:

<http://main.uab.edu/Sites/students/53998/>

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", "VWB 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 bottom of the window, there are three buttons: "Find", "OK", and "Cancel".

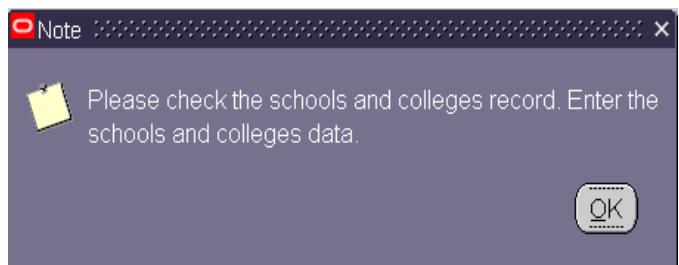
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- When required, enter future **Work Visa Expiration Date**. Date can be typed directly into the field using the dd/mmm/yyyy and must be a **future** date.

The screenshot shows the 'Current' and 'Proposed' data entry fields for a New Trainee Award. The 'Current' column has empty fields for Ethnic Origin, Veteran Status 100, Veteran Status 100A, I-9 Status, Visa Type, and Work Visa Expiration Date. The 'Proposed' column has dropdown menus for Ethnic Origin (Asian), Veteran Status 100 (Not a Veteran), Veteran Status 100A (Not Required - Trainee), and Visa Type (US Citizen). The Work Visa Expiration Date field is populated with 01-JUL-2013. A 'More info on Veteran Status' button is located to the right of the Veteran Status fields.

	Current	Proposed
Ethnic Origin		Asian
Veteran Status 100		Not a Veteran
Veteran Status 100A		Not Required - Trainee
I-9 Status		
Visa Type		US Citizen
Work Visa Expiration Date		01-JUL-2013

- 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.



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Entering Schools and Colleges Information

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

The screenshot shows the 'Schools and Colleges' tab selected in the ACT Documentation form. The form has a header with tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. Below the tabs is 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 highlighted in yellow. There are four empty rows below it. A scroll bar is visible on the right side of the table.

2. Select the ***name of the school or college*** from the LOV.

The screenshot shows the 'Schools and Colleges Attended' section of the ACT Documentation form. It has a header with 'Schools and Colleges Attended' and 'Faculty/Instructor Information'. Below the header is a table with the following columns: Delete?, School or College, Degree Name, Degree Date, Type, Transcript/Official Documentation on File, and Degree Discipline. The first row is highlighted in yellow. There are four empty rows below it. A scroll bar is visible on the right side of the table. Below the table, there is a text box labeled 'Comments' and two buttons: 'Return to Previous Form' and 'Save'.

Note: The School and College LOV include listings of Institutions within the United States however; if the institution does not appear in the LOV listing, select **Institution Not Available in Listing**. For Institutions outside of the United States select **Foreign University**.

3. 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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- 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).

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

Address Return to Previous Form Save

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

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Entering Phonebook Information

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

The screenshot shows the 'Phonebook' tab of the 'PERSON DATA FORM'. The form is titled 'Data used for the UAB Electronic Directory'. It has two main columns: 'Current' and 'Proposed'. Under 'Current', there are four input fields: 'Individual Online List', 'Online Job Title', 'Online Display Name', and 'Faculty and Staff List'. Under 'Proposed', there are three input fields: 'Yes' (for Individual Online List), a blank field (for Online Job Title), and another blank field (for Online Display Name). To the right of the 'Proposed' fields, there is a checkbox labeled 'Assignment Job Title (Last Name, First Name)' and a note '*** Please do not add suffix'. At the bottom of the form, there is a 'Comments' text area and 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.
6. Proceed onto the **LICENSE** tab or **TERMINATION** tab if applicable.

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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 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'. It contains 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.**

This screenshot shows a list of values (LOV) for the 'Type' field. The list includes: Name, Certification, License (highlighted in blue), Membership, and Professional Competency Certification.

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

This screenshot shows a dialog box titled 'License Title'. It has a 'Find %' search field at the top. Below the search field is a list of license titles. 'Architect' is highlighted in blue. The list includes: 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, and Medical Doctor, Temp Foreign L/C. At the bottom of the dialog are three buttons: 'Find', 'OK', and 'Cancel'.

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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.**

The screenshot shows the 'License' tab selected in the top navigation bar. Below the tabs, the 'License/Certificate/Membership Information' section is displayed. It is divided into two columns: 'Current' and 'Proposed'. The 'Current' column has four empty input fields for 'Type', 'Title', 'Number', and 'Expiration Date'. The 'Proposed' column has three input fields: 'License' (with a dropdown menu showing 'Engineer, Professional'), '12345' (for the Number), and '31-DEC-2012' (for the Expiration Date). A note at the bottom of the form states: 'Use down arrow to create multiple records.'

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.

7. 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.

The screenshot shows the 'Termination' tab selected in a software interface. The tab bar at the top includes 'Personal', 'Employment', 'Phonebook', 'License', 'Termination', and 'Schools and Colleges'. The main content area is divided into two columns: 'Current' and 'Proposed'. Under 'Current', there are five input fields labeled 'Actual Date', 'Projected Last Day', 'Leaving Reason', 'Rehire Recommendation', and 'Recommendation Reason'. Under 'Proposed', there are four input fields, with the first one labeled 'Projected Last Day' and containing a calendar icon. At the bottom left, there is a 'Comments' section. At the bottom right, there are two buttons: 'SAVE' and 'ADDRESS'.

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.

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

Cities

Find Hoover%

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**.

Address

	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

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6. To enter the **campus address**, click in the **ADDRESS TYPE** field and **press the down arrow**. The **ADDRESS TYPE** field becomes blank. Click on the **LOV** and select **Campus Primary**. Click **OK**.
7. Enter the **two letter building code** in the **BUILDING** field. Click in the **ROOM NUMBER** field, the **ADDRESS LINE3** field will populate with the UAB building associated with the two letter code entered.

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

8. Enter the **room or floor number** in the **ROOM** field.
9. In the **CITY** field, type in the **name of the city** in which the UAB building is located. The **CITIES** LOV will open; select the **correct Zip Start-Zip End** range for the UAB building selected. Click **OK**.
10. Enter the **four-digit zip code extension** for the department in which the employee will be working to ensure that the employee receives his or her campus mail. Click **SAVE**
11. Repeat the steps 6 - 10 if a Campus Secondary address is necessary.

The screenshot shows the 'Address' form with two 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 corresponding fields. The 'Proposed' fields are highlighted in yellow and contain the following values: Address Type (blank), Building (VH), Room (456), Address Line3 (VOLKER HALL), City (Birmingham), State (AL), and Zip Code (35294 - 4564). 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' form with a table. The table has four columns: 'Delete', 'Current', 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. The 'Delete' column has three checkboxes. The 'Current' column has three empty fields. The 'Type' column has three empty fields. The 'Phone Number' column has three empty fields. The 'Date From' column has three empty fields. 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.

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

The screenshot shows a form titled 'Phones' with a table containing one record. The columns are 'Delete Current', 'Type', 'Phone Number (xxxxxxxxxx)', and 'Date From'. The 'Type' column contains 'Home', the 'Phone Number' column contains '(205) 645-1234', and the 'Date From' column contains '01-OCT-2009'. There are three empty rows below the first one. A note at the bottom says 'Use the down arrow to create multiple records.'

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

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 as before, but now with two records. The first record is 'Home' with phone number '(205) 645-1234' and date '01-OCT-2009'. The second record is 'Campus Primary' with phone number '(205) 934-5644' and date '01-OCT-2009'. There is one empty row below the second one. The note at the bottom remains the same.

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

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.

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New Trainee Award

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.

The screenshot shows the 'General Assignment Information' form. It is divided into two main sections: 'Current' and 'Proposed'. The 'Current' section contains 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 contains a dropdown menu for Assignment Category (currently showing 'Active Assignment'), a dropdown for Organization, a dropdown for Location, a dropdown for Position, a dropdown for Job, a dropdown for Grade, a dropdown for Payroll Group, a dropdown for Timecard Dist Number, a dropdown for Timekeeping Method, and a dropdown for Timekeeping Organization. At the bottom of the form is a 'Comments' text area. Below the form are two buttons: 'Return to Previous Form' and 'Save'.

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

The screenshot shows the 'Assignment Categories' dialog box. It has a 'Find %' search field at the top. Below the search field is a list of 'Employment Category' options: '06 Student' and '20 Post Doc Trainee'. The '06 Student' option is currently selected and highlighted in blue. At the bottom of the dialog box are three buttons: 'Find', 'OK', and 'Cancel'.

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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.

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

- 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.

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			

- 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**.

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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.

Copy and paste link to URL:

<http://uabfinancial.infomedia.com/content.asp?id=361681>

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

The screenshot shows a horizontal navigation bar with several buttons. The buttons are: Person Data, Address, Assignment (highlighted with a dashed border), Salary, Element Entries, Labor Sources, and Document Subgroup. Below these are a row of buttons: Save, Submit, Cancel this document, Log, Reassign, and a set of navigation arrows (<<, <, >, >>) and a search icon.

This will open the **SALARY** Screen.

The screenshot shows the SALARY screen. At the top, there's a 'Component Reasons' section with a table with columns: Reason, Change Value, and Change %. The 'Reason' and 'Change Value' fields are highlighted in yellow. Below this table is a note: 'Use the down arrow to create multiple records.' Below the table is a large section with two columns: 'Current' and 'Proposed'. The 'Current' column has fields for: Projected Assignment Salary, Actual Assignment Rate of Pay, FTE, Hosp Calc Code, Premium Plan, Salary Basis, Payroll, Outside Income Source, Outside Income, CFB Code, and Comments. The 'Proposed' column has fields for: Projected Assignment Salary, Actual Assignment Rate of Pay, FTE, Hosp Calc Code, Premium Plan, Salary Basis (populated with 'TRAINEE'), Payroll (populated with 'TRAINEE'), Outside Income Source, Outside Income (with '(Annual)' next to it), CFB Code, and Comments. At the bottom of the screen are two buttons: 'Return to Previous Form' and 'Save'.

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.

The screenshot shows a 'Component Reason' lookup window. It has a search bar at the top with the text 'Find N%'. Below the search bar is a list of component reasons: 'Component Reason', 'New Award' (highlighted in blue), and 'No Recurring Pay'. At the bottom of the window are three buttons: 'Find', 'OK', and 'Cancel'.

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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**.

Component Reasons		
Reason	Change Value	Change %
New Award	2,000.00	
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		

Return to Previous Form
Save

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**.

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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 'Assignment' 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:' field. 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 a red icon and the text 'UAB_AKF'. Below the title bar 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.**

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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		2100282.000.123300000.339200000					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 30,000.00 and 'Element Name' is a dropdown menu. Below is a table with columns: Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The table has four rows. The first row has '01-MAR-2008' in the From Date field, '2100504.000.123900000.392303000' in the GL Code field, and '25.00' in the % field. The second row has '01-MAR-2008' in the From Date field, '2100506.000.123900000.392303010' in the GL Code field, and '25.00' in the % field. The third row has '01-MAR-2008' in the From Date field, '30-JUN-2008' in the To Date field, '237542' in the Project field, '10.01' in the Task field, '1637542' in the Award field, '10' in the Exp Or field, and '25.00' in the % field. The fourth row has '01-MAR-2008' in the From Date field, '31-MAR-2009' in the To Date field, '223114' in the Project field, '03.05' in the Task field, '1523114' in the Award field, '10' in the Exp Or field, and '25.00' in the % field. An arrow points to the 'Project' field in the third row. At the bottom right, 'Total LD %' is 100.00.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	01-MAR-2008	2100504.000.123900000.392303000					25.00
<input type="checkbox"/>	<input type="checkbox"/>	01-MAR-2008	2100506.000.123900000.392303010					25.00
<input type="checkbox"/>	<input type="checkbox"/>	01-MAR-2008	30-JUN-2008	237542	10.01	1637542	10	25.00
<input type="checkbox"/>	<input type="checkbox"/>	01-MAR-2008	31-MAR-2009	223114	03.05	1523114	10	25.00

Comments: Total LD % 100.00

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, Person Data, Assignment Data, and a bottom section with checkboxes and buttons. A red circle highlights the checkboxes for 'Person', 'Address', 'Assignment', 'Salary', and 'Labor Sources'.

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

Person Data	
Name	Example, Three
Identification Number	
SSN	
Service Date	01-APR-2011
Date of Birth	14-JUL-1980
Gender	Male
Ethnic Origin	Asian
Total Active Assignments	1
Total Projected Annual Salary	24,000.00
<input type="checkbox"/> Prior UAB Service	

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 Engir
Position	442000000.00001.031001
Primary	
Payroll	Trainee

Checkboxes: ☒ Person, ☒ Address, ☒ Assignment, ☒ Salary, ☐ Element Entries, ☒ Labor Sources, ☐ Doc Subgroup

Comments: [Text Area]

Buttons: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, Document Subgroup, Save, Submit, Cancel this document, Log, Reassign, Navigation arrows.

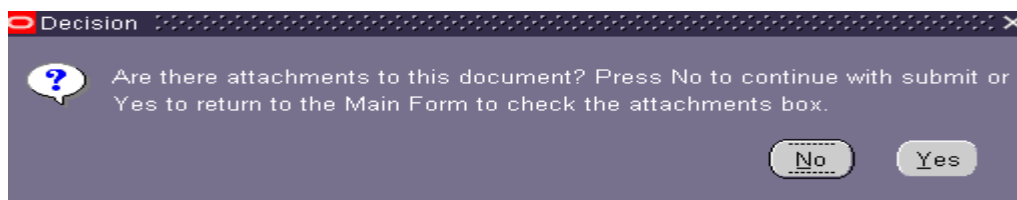
1. On the **ACT MAIN FORM**, verify checks have been inserted in the checkbox next to **PERSON, ADDRESS, ASSIGNMENT, SALARY** and **LABOR SOURCES**.

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.

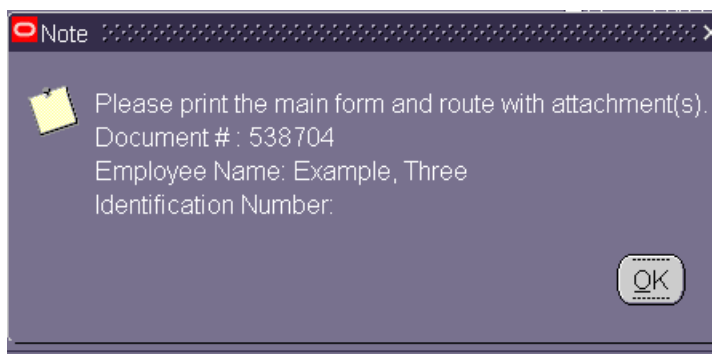
2. On the **ACTMAIN FORM**, verify a check is in the Attachments checkbox; assemble all attachments to be submitted with the document.
3. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
4. Click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

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



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

****** 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**.
11. 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.
12. 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.
Copy and paste link into URL:
<https://idm.blazernet.uab.edu/bid/reg>

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