

## **Appoint, Change, Terminate (ACT) Documentation**

### **Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)**

A New Hire document for a **One Time Requisition Pay Employee (Status 99)** is completed by the HR Officer for individuals whom UAB anticipates making only **ONE** employee payment. It should not be used for individuals that a department anticipates paying more than once; even if subsequent payments will not be made for several months. Requisition employees are not eligible for any UAB benefits or privileges of employment. For UAB Policy on payment of Individual Services, [click here](#). (*Professional & Consulting Contracting Policy*)

The information entered on the New Hire document for a **One Time Requisition Pay Employee** provides the data needed for the employee to be paid for the service they provided to UAB. Therefore, providing as much data as possible and ensuring its accuracy is important. It is recommended that before starting this procedure you have all of the information for the requisition pay employee in front of you and that you complete it in sequential order.

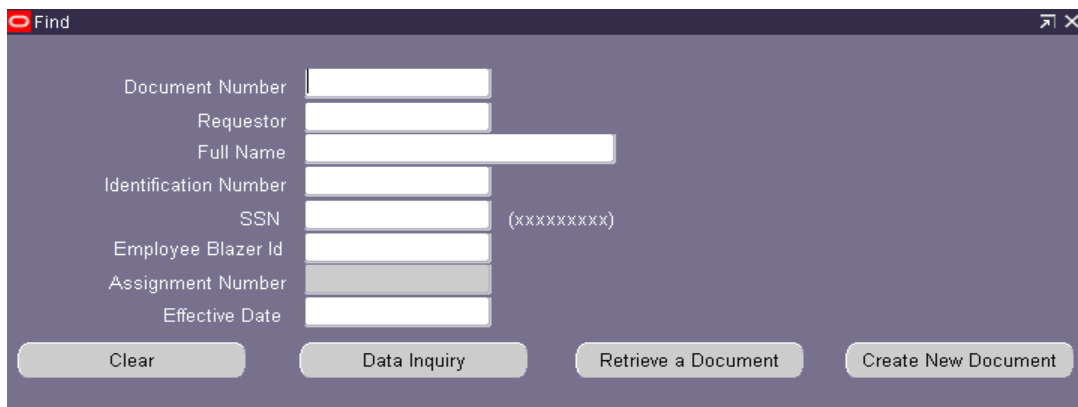
Instructions for completing each individual form on the New Hire document can be accessed by scrolling to the referenced page number or by clicking on the header.

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# **Appoint, Change and Terminate (ACT) Documentation** **Creating a New Hire Document for a One Time Requisition Pay Employee** **(Status 99)**

## **Creating a New Hire Document**

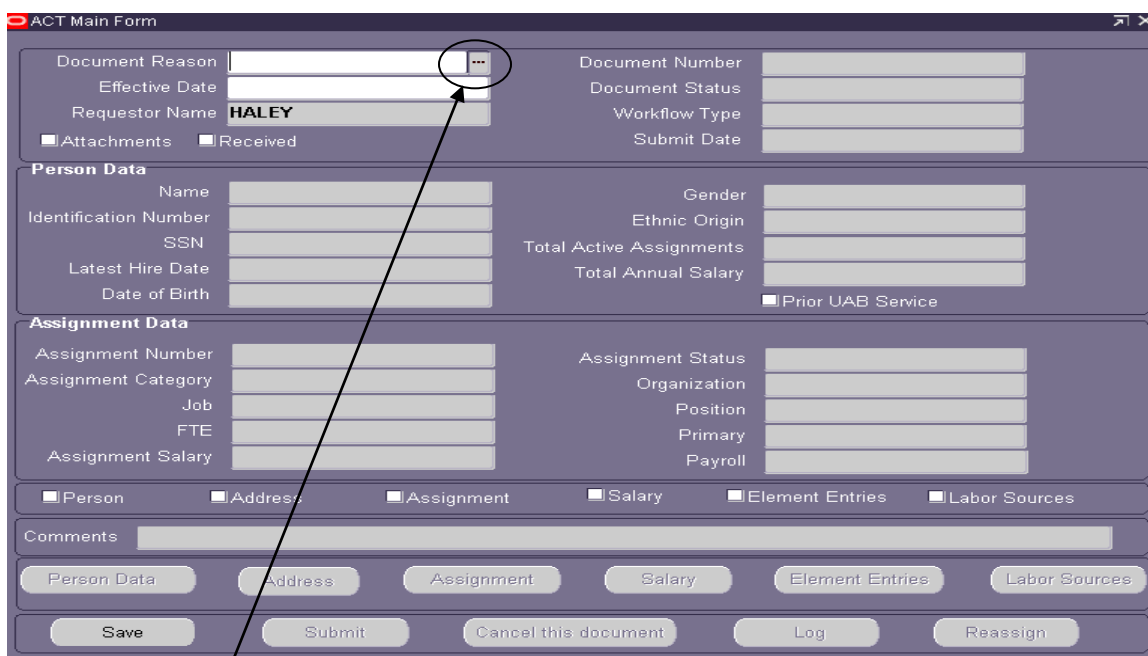
1. Selecting **ACT** opens the **ACT FIND** window.



The ACT FIND window is a search interface with the following fields and buttons:

- Document Number
- Requestor
- Full Name
- Identification Number
- SSN (with a mask of (xxxxxxxx))
- Employee Blazer Id
- Assignment Number
- Effective Date
- Buttons: Clear, Data Inquiry, Retrieve a Document, Create New Document

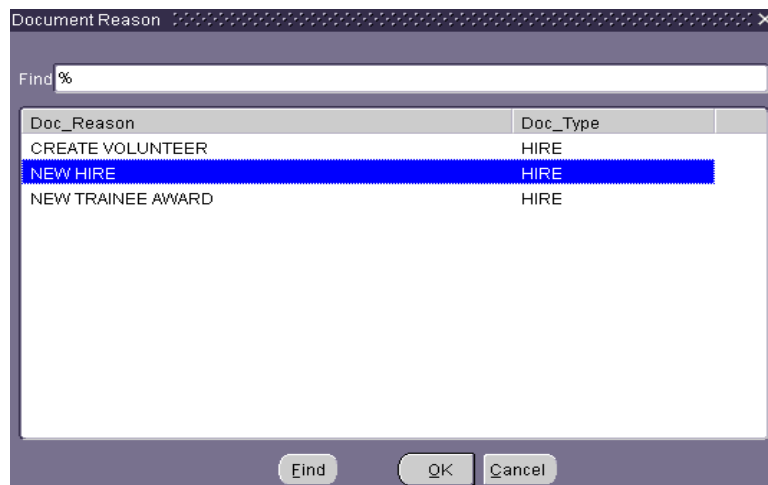
2. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.



The ACT Main Form window contains the following sections and fields:

- Document Reason**: A dropdown menu with a LOV (List of Values) icon (three dots) circled in red.
- Effective Date**: A date field.
- Requestor Name**: A text field containing "HALEY".
- Attachments** and **Received**: Checkboxes.
- Person Data**:
  - Name, Identification Number, SSN, Latest Hire Date, Date of Birth
  - Gender, Ethnic Origin, Total Active Assignments, Total Annual Salary
  - Prior UAB Service**: Checkbox
- Assignment Data**:
  - Assignment Number, Assignment Category, Job, FTE, Assignment Salary
  - Assignment Status, Organization, Position, Primary, Payroll
- Navigation Buttons**: Person, Address, Assignment, Salary, Element Entries, Labor Sources
- Comments**: A text area.
- Action Buttons**: Save, Submit, Cancel this document, Log, Reassign

3. Click on the **LOV** box in the **DOCUMENT REASON** field.
4. Choose **New Hire**, click **OK**. Once you click OK you will be directed back to the **ACT MAIN FORM**.



The Document Reason LOV window displays a list of document reasons and types:

Doc_Reason	Doc_Type
CREATE VOLUNTEER	HIRE
<b>NEW HIRE</b>	<b>HIRE</b>
NEW TRAINEE AWARD	HIRE

Buttons: Find, OK, Cancel

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- Enter the **Effective Date** in the **EFFECTIVE DATE** field.

**Note: The effective date should be the first day of the service being provided. 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.

ACT Main Form

Document Reason: NEW HIRE

Effective Date: 01-AUG-2011

Requestor Name: HALEY

☒ Attachments ☐ Received

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

The system will assign a **Document Number** and the **DOCUMENT STATUS** is **OPEN**.

**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 their name, Social Security number, or employee ID number until the document has reached a **COMPLETE** status.

ACT Main Form

Document Reason: NEW HIRE

Effective Date: 01-AUG-2011

Requestor Name: HALEY

☒ Attachments ☐ Received

Document Number: 569869

Document Status: OPEN

Workflow Type: HIRE

Submit Date:

**Person Data**

Name: Identification Number: SSN: Service Date: Date of Birth: Gender: Ethnic Origin: Total Active Assignments: Total Projected Annual Salary: ☐ Prior UAB Service

**Assignment Data**

Assignment Number: Assignment Category: Job: FTE: Projected Assignment Salary: Assignment Status: Organization: Position: Primary: Payroll:

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

Comments:

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

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

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

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

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

### Entering Person Data Information

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

The screenshot shows the bottom of the ACT Main Form. At the top is a 'Comments' text area. Below it is a row of tabs: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. The 'Person Data' tab is highlighted. Below the tabs is a row of buttons: 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation buttons '<<', '<', '>', '>>', and a '#' button.

The **PERSON DATA SCREEN** opens.

### Entering Personal Information

**Required fields are yellow and must be completed before you can save the form and move on.**

1. Enter the **employee's Social Security number** in the **SSN** field; **do not enter dashes**. Press **TAB** or click in the next field.
2. Enter the **employee's last name** exactly as it should appear in the **LAST NAME** field. Press **TAB** or click in the next field.

The screenshot shows the 'PERSON DATA SCREEN' with the 'Personal' tab selected. The screen is divided into two columns: 'Current' and 'Proposed'. The 'Proposed' column has yellow highlights on the SSN, Last Name, First Name, Middle Names, Title, Date Of Birth, and Gender fields. The 'Current' column has grayed-out fields for SSN, Last Name, First Name, Middle Names, Suffix, Title, Date Of Birth, and Gender. At the bottom, there is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

3. Enter the **employee's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
4. Enter the **employee's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
5. Enter the **employee's suffix**, in the **SUFFIX** field if applicable. **Example: Sr., Jr., III, etc.** Press **TAB** or click in the next field.

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### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

- 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.**

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

- Click the **SAVE** button at the bottom of the screen.

- Once you click the **SAVE** button, the screen will move to the **EMPLOYMENT** Tab.

### Entering Employment Information

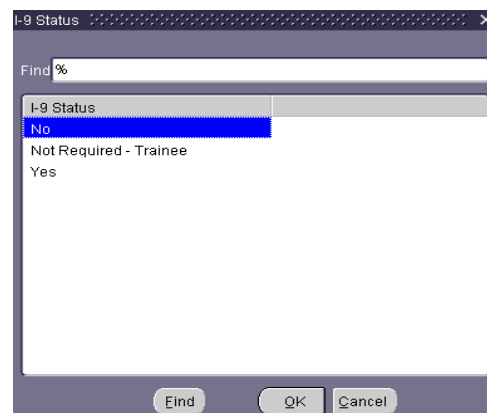
- In the **ETHNIC ORIGIN** field, click the **LOV** and select the *employee's ethnic origin*. Click **OK**.

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

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### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

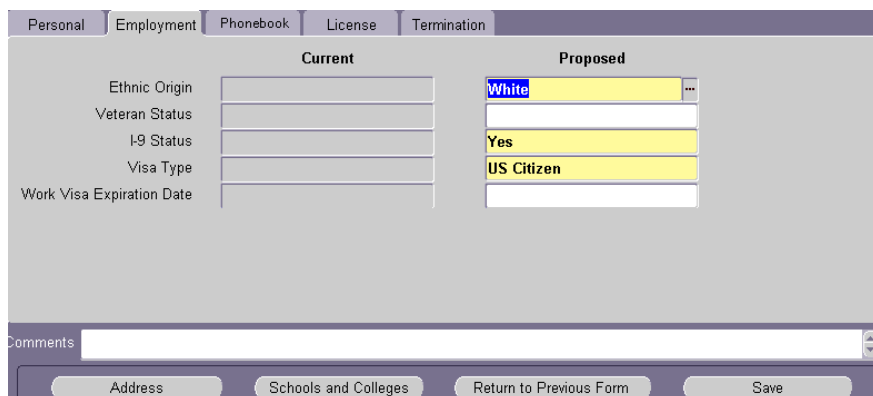
2. Click in the **VETERANS STATUS** field only if the employee is a veteran. If the employee is not a veteran, leave the field blank. If applicable, use the **LOV** to select the correct Veteran Status; click **OK**.
3. In the **I-9 STATUS** field, click the LOV and select the appropriate I-9 Status from the list. Click **OK**. For information regarding I-9's go to Records Administration webpage.  
Copy and paste link into URL:  
[http://www.hrm.uab.edu/main/records/form\\_i9.html](http://www.hrm.uab.edu/main/records/form_i9.html)



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

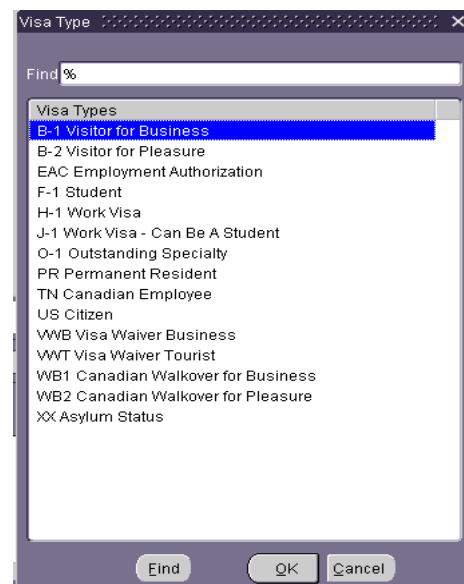
4. In the **VISA TYPE** field click on the LOV.

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



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

For more information on Visa Types, go to International Scholars Services (ISS) webpage.  
Copy and paste link into URL:  
<http://main.uab.edu/Sites/students/53998/>



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### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

- 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 'Termination' tab selected. The form is divided into 'Current' and 'Proposed' sections. The 'Proposed' section contains the following data:

Field	Value
Ethnic Origin	White
Veteran Status	Yes
I-9 Status	Yes
Visa Type	H-1 Work Visa
Work Visa Expiration Date	01-DEC-2010

At the bottom, there is a 'Comments' field and four buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

- Click on the **TERMINATION** tab.

#### Entering Termination Information

**Note:** The **TERMINATION** Tab is used when entering a One Time Requisition Pay Employee. The Requisition Pay Employee is being paid for a ONE TIME SERVICE only; the Projected Last Day of Work is thirty days after the effective date of the New Hire document.

- Click on the **TERMINATION** tab.
- 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.

The screenshot shows the 'Termination' tab selected. The form is divided into 'Current' and 'Proposed' sections. The 'Proposed' section contains the following data:

Field	Value
Actual Date	
Projected Last Day of Work	31-DEC-2008
Leaving Reason	
Rehire Recommendation	
Recommendation Reason	

At the bottom, there is a 'Comments' field and four buttons: 'Address', 'Schools and Colleges', 'Return to Previous Form', and 'Save'.

- Click the **SAVE** button at the bottom of the screen; click the **ADDRESS** button at the bottom of the form.

# **Appoint, Change, Terminate (ACT) Documentation** **Creating a New Hire Document for a One Time Requisition Pay Employee** **(Status 99)**

## **Entering Address and Phone Information**

All employees must have a local (US) address and/or campus address in order to submit the New Hire Document.

The screenshot shows the 'Address' and 'Phones' form in the ACT system. The 'Address' section has two columns: 'Current' and 'Proposed'. Under 'Current', there are fields for 'Address Type', 'Address Line1', 'Address Line2', 'Address Line3', 'City', 'State', and 'Zip Code'. Under 'Proposed', there are corresponding fields. A 'Delete' checkbox is next to the 'Current' column. The 'Phones' section has a 'Delete' checkbox, 'Current' checkbox, 'Type', 'Phone Number (xxxxxxxx)', and 'Date From' fields. A 'Comments' field is at the bottom left. 'Return to Previous Form' and 'Save' buttons are at the bottom right. A note says 'Use the down arrow to create multiple records.'

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

The screenshot shows the 'Address Types' LOV window. It has a 'Find %' search field. Below it is a list of address types: 'Campus Primary', 'Campus Secondary', 'Campus Tertiary', 'Home', and 'Recruiting'. 'Home' is highlighted in blue. At the bottom are 'End', 'OK', and 'Cancel' buttons.

2. Enter the **employee's street address** in the **ADDRESS LINE1** field. There are two more address lines available if needed.
3. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type **the name of the city in which the employee lives**, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

The screenshot shows the 'Cities' LOV window. It has a 'Find Birmingham%' search field. Below it is a table with the following columns: City, State, Zip Start, Zip End, and County. The first row is highlighted in blue.

City	State	Zip Start	Zip End	County
Birmingham	AL	35020	35020	Jefferson
Birmingham	AL	35200	35299	Jefferson
Birmingham	AL	35201	35226	Shelby
Birmingham	AL	35228	35238	Shelby
Birmingham	AL	35240	35240	Shelby
Birmingham	AL	35242	35246	Shelby
Birmingham	AL	35249	35249	Shelby
Birmingham	AL	35253	35255	Shelby
Birmingham	AL	35259	35261	Shelby
Birmingham	AL	35263	35263	Shelby
Birmingham	AL	35266	35266	Shelby
Birmingham	AL	35277	35283	Shelby

At the bottom are 'Find', 'OK', and 'Cancel' buttons.



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4. Highlight the **correct zip code range** for the city and county in which the employee lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

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

A screenshot of a form section. On the left, there is a checkbox labeled 'International Address' which is checked. To the right of the checkbox is a yellow rectangular field labeled '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.

A screenshot of a 'Proposed' list box. The list contains the following items: 'Campus Primary', 'MEB', '5th Floor', 'MEDICAL EDUCATION BUILDING', 'Birmingham', 'AL', '35294', and '6666'. The 'Campus Primary' item is highlighted with a mouse cursor.

**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 providing a service. Click **SAVE**.
11. To enter phone numbers for the employee, click in the **TYPE** field located in the **PHONES** region of the form.

A screenshot of the 'Phones' section of a form. It has a header row with 'Delete Current', 'Type', 'Phone Number (xxxxxxxxxx)', and 'Date From'. Below the header are three rows of input fields. An arrow points to the 'Type' field in the first row. At the bottom, there is a note: 'Use the down arrow to create multiple records.'

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

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

Type	Phone Number (xxxxxxxxxx)
Home	2059985986

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

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

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

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

Phones		Type	Phone Number (xxxxxxxxxx)	Date From
Delete	Current	Home	(256) 603-1514	03-OCT-2005
<input type="checkbox"/>	<input type="checkbox"/>	Campus Primary	(205) 934-4678	03-OCT-2005
<input type="checkbox"/>				

Use the down arrow to create multiple records.

18. Click the **ASSIGNMENT** button at the bottom of the **ACT Main Form**.

## Appoint, Change, Terminate (ACT) Documentation

### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

The information on the **Assignment** screen identifies the individual being paid for a one time service, as a Status 99 employee. It also identifies the organization and position number the individual is affiliated with.

#### Entering Assignment Information

1. Click on the **ASSIGNMENT** button located on the **ACT MAIN FORM**. This will open the **ASSIGNMENT** form.
2. Select **99 Requisition** from the **ASSIGNMENT CATEGORY LOV**. Click **OK**.

The screenshot shows the 'Assignment' form with a modal window titled 'Assignment Categories' open. The modal window has a search field 'Find %' and a list of 'Employment Category' options: 06 Student, 07 Resident, 11 Federal Work Study, 12 Three 12-Hour Shifts, 17 Weekend Staff Nurse, 21 Post Doc Employee, and 99 Requisition. The '99 Requisition' option is highlighted. The background form has fields for 'Effective Date From', 'Effective Date To', 'Primary', 'Shift Differential Code', 'Grandparented', and 'Effort Report Eligible'. Below these is a section for 'General Assignment Information' with 'Current' and 'Proposed' tabs. The 'Current' tab is active, showing 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' tab shows an 'Active Assignment' section. At the bottom of the form are buttons for 'Salary', 'Labor Sources', 'Element Entries', 'Return to Previous Form', and 'Save'.

3. Click in the **ORGANIZATION** field; type the **appropriate organization** in which the individual will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.
4. The **PAYROLL GROUP** field automatically populates with **Supplemental**.

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General Assignment Information	
Current	Proposed
Assignment Category	99 Requisition
Status	Active Assignment
Expected Return Date	
Organization	392300000 Pathology Chair Office
Location	Bham Main Campus
Position	
Job	
Grade	
Payroll Group	Supplemental
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	

- Click in the **POSITION** field; select the **appropriate 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. By entering the correct position, the **JOB** field and **GRADE** field will be auto populated.

General Assignment Information	
Current	Proposed
Assignment Category	99 Requisition
Status	Active Assignment
Expected Return Date	
Organization	392300000 Pathology Chair Office
Location	Bham Main Campus
Position	392300000.88901.040501
Job	0137.Lecturer
Grade	F.999
Payroll Group	Supplemental
Timecard Dist Number	
Timekeeping Method	NA
Timekeeping Organization	
Comments	

Salary
Labor Sources
Element Entries
Return to Previous Form
Save

- Enter **NA** in the **TIMEKEEPING METHOD** field; or select **NA (NOT APPLICABLE)** from the LOV.
- Click on the **SAVE** button at the bottom of the screen.
- Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM**.

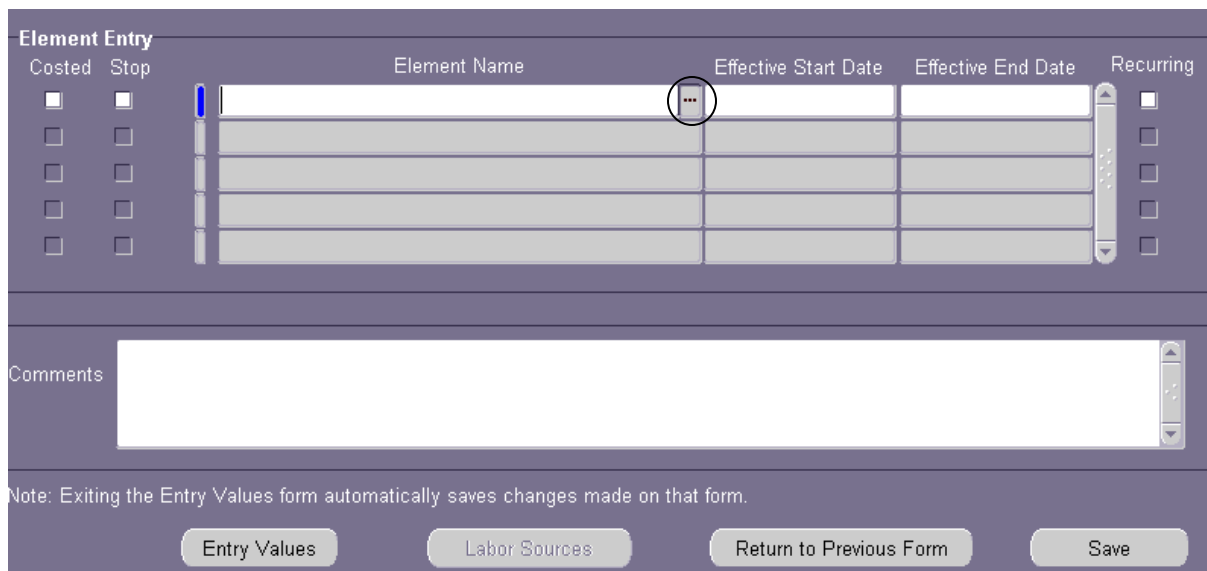
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The information entered on the **ELEMENT ENTRIES** form, is used by Payroll Services to initiate a One Time Payment for the individual being paid for a one time service. Within the **ELEMENT ENTRIES** form the following information is required in order to process payment: type of payment, effective date of the payment, and dollar amount of the payment to be made by Payroll Services.

#### Entering Element Entries

1. Click on the **ELEMENT ENTRIES** button at the bottom of the **ACT MAIN FORM**.



Costed	Stop	Element Name	Effective Start Date	Effective End Date	Recurring
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

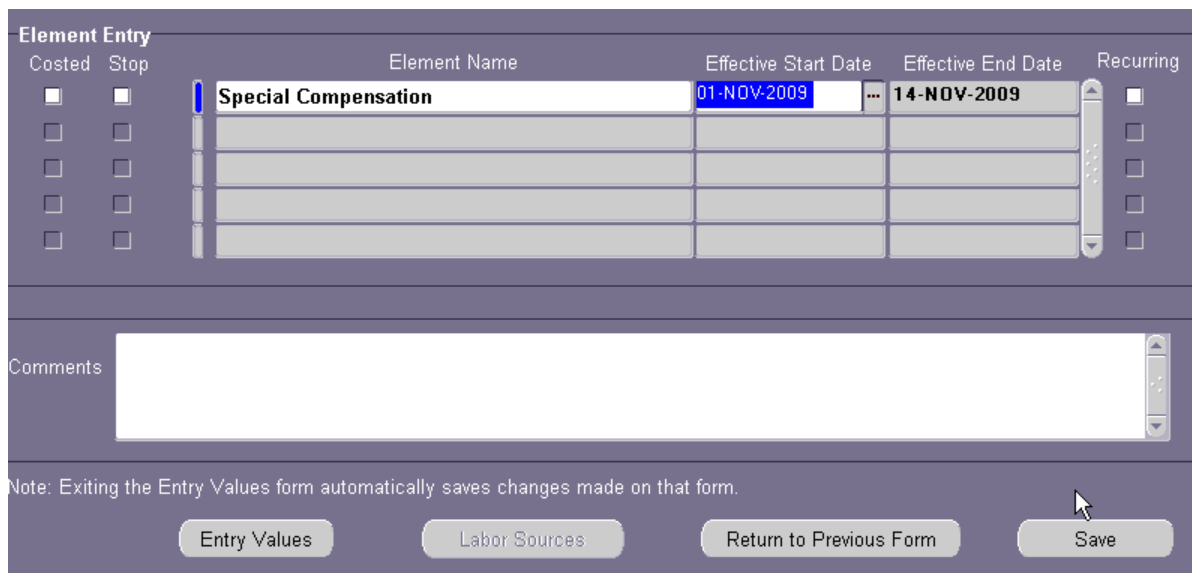
Comments

Note: Exiting the Entry Values form automatically saves changes made on that form.

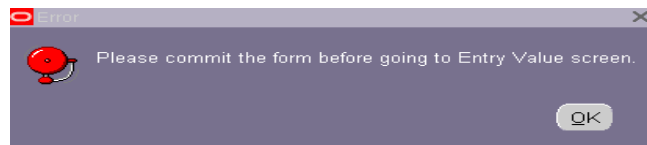
2. Click on the LOV for the **ELEMENT NAME** field, and choose *the appropriate element name*. For a description of available Element Names and descriptions, go to Financial Affairs webpage. Copy and paste link into URL:  
<http://financialaffairs.uab.edu/content.asp?id=303268>
3. The **EFFECTIVE START DATE** will be auto populated with the effective date of the document. The **EFFECTIVE END DATE** will be auto populated with the last day of the payroll period in which the document is to be paid.

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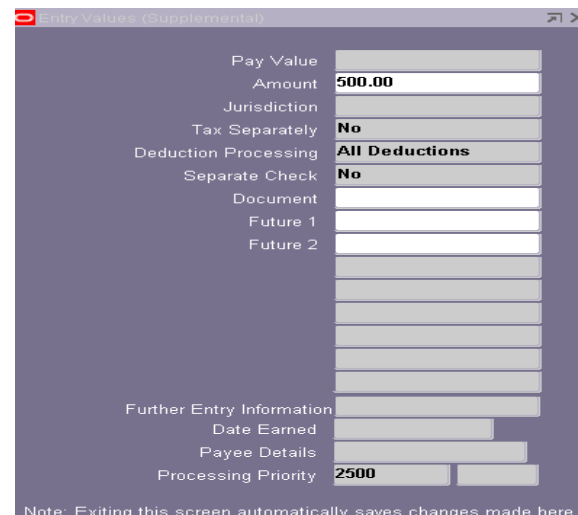


4. In the **COMMENTS** section enter **a brief explanation of the payment and what services the individual provided to the University.**
5. Click on the **SAVE** button at the bottom of the form before clicking on the **ENTRY VALUES** button. **If you do not save the screen before attempting to click on the ENTRY VALUES button, you will receive this error message.**
6. Click on the **OK** button to return to the **ELEMENT** screen; click the **SAVE** button at the bottom of the form.
7. Click on the **ENTRY VALUE** button at the bottom of the form.



8. The **ENTRY VALUES** screen will look similar to the one to the one at the right.
9. Click in the **AMOUNT** field and enter **the monetary amount to be paid.** The remaining fields will auto populate as needed.
10. Click on the **X** at the top of this window to close and save this information.

**Note: There is not a Save button on the Entry Values Screen Exiting this screen automatically saves the changes.**



11. From the **ELEMENT ENTRIES** form; click on the **LABOR SOURCE** button.

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The Labor Source screen indicates what account string the individual's payment will be costed (charged) to.

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#### Entering Labor Source

##### Entering General Ledger (GL) Information

The screenshot shows the 'Costing' screen. At the top, 'Assignment Salary' is set to '.00' and 'Element Name' is a dropdown menu. Below this 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, each with a checkbox in the 'Current LD' column. To the right of the table is a 'Total LD %' field showing '.00'. Below the table is a 'Comments:' section with a text area. At the bottom are two buttons: 'Return to Previous Form' and 'Save'.

1. Click on the **GL CODE** LOV. This opens the **UAB\_ADKF 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 text input and a dropdown arrow. Below the input 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.

## Appoint, Change, Terminate (ACT) Documentation

### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

UAB\_AKF

ACCOUNT **2100405** PATHOLOGY MOL/CELLUL

SUBACCOUNT **000** DEFAULT SUBACCOUNT

BALANCING **123900000** JOINT HLTH SCI GEN OPER FDS

ORGANIZATION **392301000** MOLECULAR & CELLULAR PATHOLOGY

FUTURE **0000** DEFAULT

OBJECT  ...

OK Cancel Combinations Clear Help

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

4. Type in the % field **the percent of funding** to be paid from the GL account string.

**Note: A One Time Pay Requisition Employee can have multiple GL accounts being costed. Each GL account string will need to be entered individually. Only one funding source is allowed for each record/row. Use the down arrow key to move the cursor to the next available row. The total percent of funding must be 100%.**

Assignment Salary **.00** Element Name

**Costing**

Assignment Element

Current	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
		From Date	To Date					
<input type="checkbox"/>	<input type="checkbox"/>	01-NOV-2009	2100405.000.123900000.392301000					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"/>							
<input type="checkbox"/>	<input type="checkbox"/>							

Comments:

Total LD % **100.00**

Return to Previous Form Save

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



## Appoint, Change, Terminate (ACT) Documentation

### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

#### Entering Grant (GA) Funding Sources

**Note: Before submitting the New Hire Document for a One Time Requisition Pay Employee being paid from a GA Account String, contact Grants and Contracts to verify the expenditure has been approved in advance.**

1. Click one time in the **PROJECT** field.

The screenshot shows the 'Costing' section of the ACT form. It features a table with columns for 'Effective Date' (From Date, To Date), 'GL Code', 'Project', 'Task', 'Award', 'Exp Or', and '%'. An arrow points to the 'Project' column header. Below the table, there is a 'Total LD %' field showing '.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 the **percentage of effort** to be charged 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**.

The screenshot shows the 'Costing' section of the ACT form with data entered. The 'Effective Date' is set from 01-NOV-2009 to 31-DEC-2009. The 'Project' field contains '225820', 'Task' contains '01.01', 'Award' contains '1525820', 'Exp Or' contains '10', and '%' contains '100.00'. The 'Total LD %' field at the bottom right is circled in red and shows '100.00'.

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

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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.
9. Click on the **RETURN TO PREVIOUS FORM** button until you return to the **ACT MAIN FORM**.

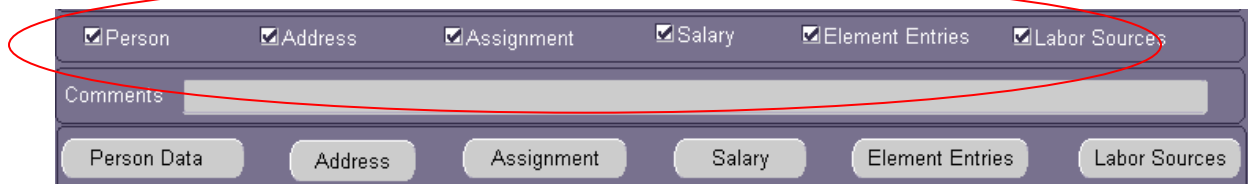
## Appoint, Change, Terminate (ACT) Documentation

### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

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

#### Submitting a Complete New Hire Document

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



The screenshot shows the ACT Main Form interface. At the top, there is a row of six checkboxes: ☒ Person, ☒ Address, ☒ Assignment, ☒ Salary, ☒ Element Entries, and ☒ Labor Sources. These checkboxes are circled with a red oval. Below this row is a 'Comments' text area. At the bottom, there are six buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 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.

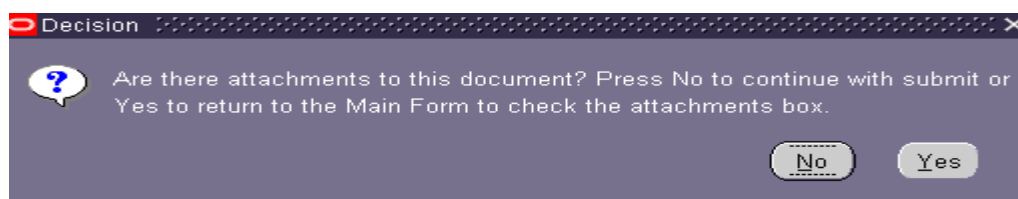
2. On the **ACT MAIN FORM**, verify you have a check in the **ATTACHMENTS** box; assemble all attachments to be submitted with New Hire document.



The screenshot shows the ACT Main Form with the following fields: 'Document Reason' set to 'NEW HIRE', 'Effective Date' set to '01-NOV-2009', and 'Requestor Name' set to 'HALEY'. Below these fields are two checkboxes: ☒ Attachments and ☐ Received.

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

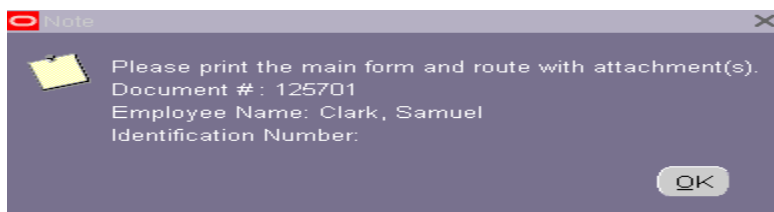


The screenshot shows a 'Decision' dialog box with a question mark icon. The text inside reads: 'Are there attachments to this document? Press No to continue with submit or Yes to return to the Main Form to check the attachments box.' At the bottom right, there are two buttons: 'No' and 'Yes'. The 'No' button is highlighted with a dashed border.

## Appoint, Change, Terminate (ACT) Documentation

### Creating a New Hire Document for a One Time Requisition Pay Employee (Status 99)

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**. Print the **ACT MAIN FORM**; attach printed copy as front page of attachments being sent to Central HR.
9. The **DOCUMENT STATUS** changes to **READY**.

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

ACT Main Form			
Document Reason	NEW HIRE	Document Number	125701
Effective Date	01-NOV-2009	Document Status	READY
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	16-OCT-2009 11:15:47
<b>Person Data</b>			
Name	Clark, Samuel	Gender	Male
Identification Number		Ethnic Origin	White / Non Hispanic
SSN		Total Active Assignments	1
Service Date	03-OCT-2005	Total Annual Salary	.00
Date of Birth	08-AUG-1960	<input type="checkbox"/> Prior UAB Service	
<b>Assignment Data</b>			
Assignment Number		Assignment Status	Active Assignment
Assignment Category	99 Requisition	Organization	392300000 Pathology Chair
Job	0137.Lecturer	Position	392300000.88901.040501
FTE	0	Primary	
Assignment Salary	.00	Payroll	Biweekly
<input checked="" type="checkbox"/> Person <input checked="" type="checkbox"/> Address <input checked="" type="checkbox"/> Assignment <input checked="" type="checkbox"/> Salary <input checked="" type="checkbox"/> Element Entries <input checked="" type="checkbox"/> Labor Sources			
Comments			
<div style="display: flex; justify-content: space-between; padding: 5px;"> <span>Person Data</span> <span>Address</span> <span>Assignment</span> <span>Salary</span> <span>Element Entries</span> <span>Labor Sources</span> </div>			
<div style="display: flex; justify-content: space-between; padding: 5px;"> <span>Save</span> <span>Submit</span> <span>Cancel this document</span> <span>Log</span> <span>Reassign</span> </div>			

**Appoint, Change, Terminate (ACT) Documentation**  
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**\*\*\*\* 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.**

Once the document is submitted, and the document status changes to **READY**, the document enters 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 document will receive an email notification when an employee's **NEW HIRE DOCUMENT** has reached **COMPLETE** status.

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