

Appoint, Change and Terminate (ACT) Documentation Create Volunteer

The **CREATE VOLUNTEER** ACT Document is completed by the HR Officer to appoint all **new volunteers** who have **never** been affiliated with UAB in an active trainee or employee status.

The information entered on the **CREATE VOLUNTEER** document 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.

Instructions for completing each individual form on the **CREATE VOLUNTEER** ACT document can be accessed by scrolling to the referenced page number.

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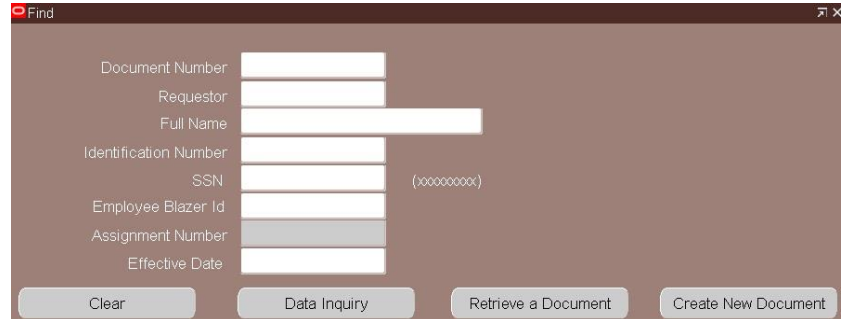
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Creating a Create Volunteer Document

UAB HR Officer → HR Transactions → ACT → Find Window.

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

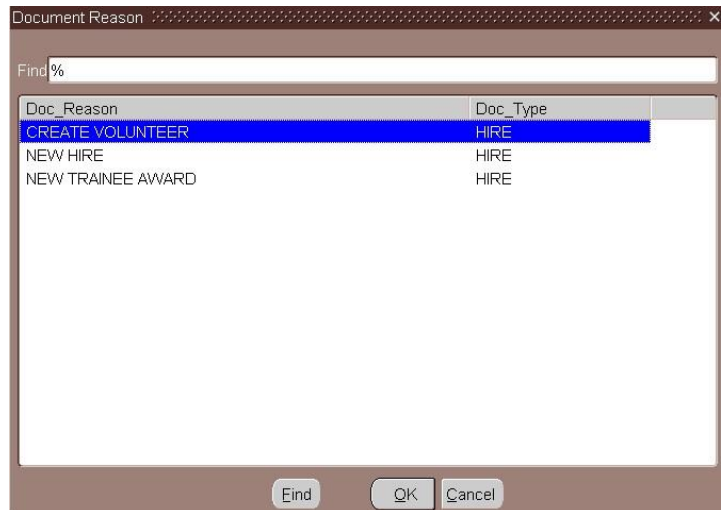
1. Click on the **CREATE NEW DOCUMENT** button; a blank **ACT MAIN FORM** will open.



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



3. Choose **Create Volunteer**, click **OK**. Once you click OK you will be directed back to the **ACT MAIN FORM**.



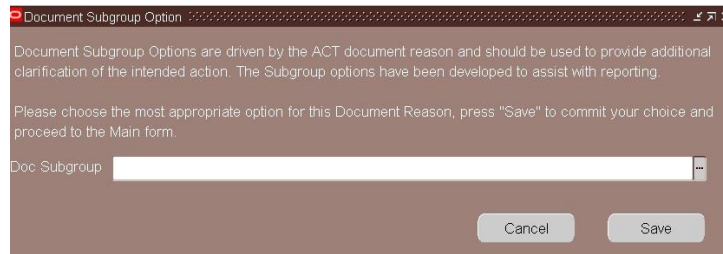
Doc_Reason	Doc_Type
CREATE VOLUNTEER	HIRE
NEW HIRE	HIRE
NEW TRAINEE AWARD	HIRE

4. Enter the **Effective Date** in the **EFFECTIVE DATE** field. **Note: This date cannot be changed once you have submitted the document.** Use the calendar **LOV** or type in the desired date using the **DD-MMM-YY** Format.

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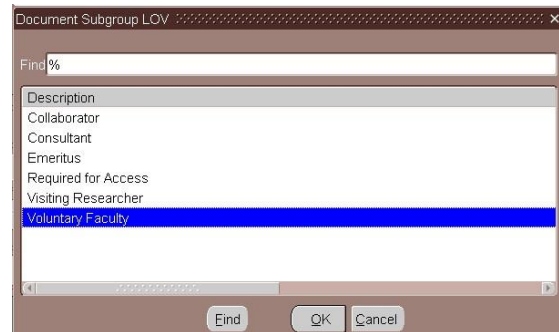
- Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.

- The **DOCUMENT SUBGROUP OPTION** window will open; click on **Doc SUBGROUP** field **LOV**.

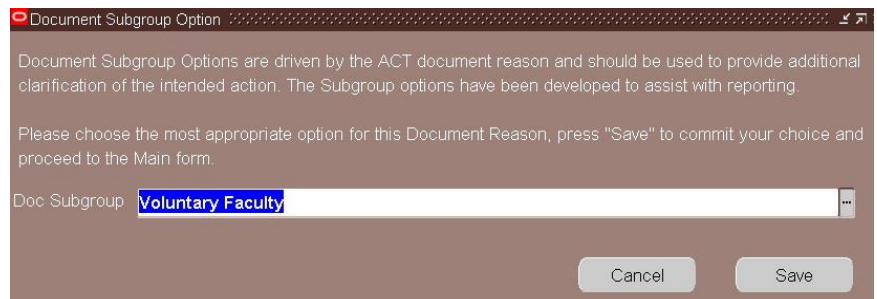


- Select the description that best explains the nature of the transaction.

- Click on **OK** to select.



- Click on **SAVE** to commit your choice and proceed to the **ACT MAIN FORM**.



Warning: If you change the **DOC SUBGROUP** field after the initial save in step 10, **you must re-save in order to commit your change.**

- Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**. The system will assign a **DOCUMENT NUMBER** and the **DOCUMENT STATUS** is **OPEN**.

BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE CREATE VOLUNTEER DOCUMENT. You will not be able to locate the new volunteer by their name, social security number, or volunteer ID number until the document has reached a **COMPLETE** status.

Appoint, Change and Terminate (ACT) Documentation

Create Volunteer

Document Reason	CREATE VOLUNTEER	Document Number	536179
Effective Date	01-APR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

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

The Person Data form contains demographic information and other personal data that is grouped into five sub forms and two buttons on the ACT form. The sub forms to be completed on a **CREATE VOLUNTEER** document are **PERSONAL**, **EMPLOYMENT**, **DIRECTORY**, and **LICENSE**. The **TERMINATION** tab will not be used. Instructions for each sub form and button are listed separately.

Entering Person Data

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

Document Reason	CREATE VOLUNTEER	Document Number	536179
Effective Date	01-APR-2011	Document Status	OPEN
Requestor Name	HALEY	Workflow Type	HIRE
<input type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	

Person Data	
Name	
Identification Number	
SSN	
Service Date	
Date of Birth	
Gender	
Ethnic Origin	
Total Active Assignments	
Total Projected Annual Salary	
<input type="checkbox"/> Prior UAB Service	

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

<input type="checkbox"/> Person	<input type="checkbox"/> Address	<input type="checkbox"/> Assignment	<input type="checkbox"/> Salary	<input type="checkbox"/> Element Entries	<input type="checkbox"/> Labor Sources	<input checked="" type="checkbox"/> Doc Subgroup
Comments						
Person Data	Address	Assignment	Salary	Element Entries	Labor Sources	Document Subgroup

Save	Submit	Cancel this document	Log	Reassign	<<	<	>	>>	?
------	--------	----------------------	-----	----------	----	---	---	----	---

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

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



Note: If you receive the following note after entering the social security number, the volunteer's personal data already exists in the Administrative Systems. A Rehire document will need to be completed on this volunteer.

4. Enter the **volunteer's last name** exactly as it should appear in the **LAST NAME** field. **Remember this is the volunteer'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.
5. Enter the **volunteer's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
6. Enter the **volunteer's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
7. Enter the **volunteer'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 **volunteer's birth date** using the **DDMMM-YY** format.

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	Current	Proposed
SSN		369-85-2147
Last Name		Test
First Name		Example
Middle Names		
Suffix		
Title		Mr.
Date Of Birth		01-JUL-1955
Gender		MALE

Comments

Address Return to Previous Form Save

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

11. Once you click the **SAVE** button, the screen will move to the **EMPLOYMENT** form.

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Entering Employment Information

	Current	Proposed
Ethnic Origin		
Veteran Status		
I-9 Status		
Visa Type		
Work Visa Expiration Date		

Comments: _____

Address Return to Previous Form Save

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

Ethnic Origin

Find %

- American Indian or Alaskan Native
- Asian
- Black or African American
- Hispanic or Latino, regardless of race
- Native Hawaiian or Other Pacific Islander
- Two or More Races
- White

Find OK Cancel

2. Enter the **I-9 STATUS** or select the appropriate I-9 Status from the **LOV**. Click **OK**.

NOTE: The Ethnic Origin and I-9 Status fields are not required fields for a CREATE VOLUNTEER document. However, it is recommended you enter the information if it is available.

I-9 Status

Find %

- No
- Not Required - Trainee
- Yes

Find OK Cancel

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

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



	Current	Proposed
Ethnic Origin		White
Veteran Status		
I-9 Status		Yes
Visa Type		US Citizen
Work Visa Expiration Date		

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

For more information on Visa Types, go to

International Scholars Services (ISS) webpage. [Click here.](#)

4. 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.

	Current	Proposed
Ethnic Origin		White
Veteran Status		
I-9 Status		Yes
Visa Type		H-1 Work Visa
Work Visa Expiration Date		01-DEC-2012

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



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

Entering Schools and Colleges Information

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

The screenshot shows the 'Person Data (Create New Document)' form with the 'Schools and Colleges' tab selected. The form contains several input fields for personal and employment data, a dropdown for 'Country' (set to 'United States of America'), and a table for entering school or college information. The table has columns for 'School or College', 'Degree Name', 'Degree Date', 'Type', 'Transcript/Official Documentation on File', and 'Degree Discipline'. The first row of the table is populated with 'Institution Not Available in List', '410 Bachelor of Business', '31-MAY-199', '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
Institution Not Available in List	410 Bachelor of Business	31-MAY-199	HD		

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The screenshot shows the 'Person Data (Create New Document)' form. The 'Schools and Colleges' tab is selected. The 'Country' dropdown is open, showing a list of countries. The search filter is set to '%Panama%'. The list includes Afghanistan, Albania, Algeria, Andorra, Angola, Argentina, Armenia, Aruba, Australia, Austria, Azerbaijan, Bahamas, Bahrain, and Bangladesh. The 'Find' button is highlighted.

Person Data (Create New Document)

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

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

Personal Employment Phonebook License Termination Schools and Colleges

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

Country: United States of America Transcript/Official

School or College: [Text Field] Degree: [Text Field]

Comments: [Text Field]

Address: [Text Field] [Text Field]

Find: [Text Field] OK Cancel

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

Appoint, Change and Terminate (ACT) Documentation Create Volunteer

Person Data (Create New Document)

Full Name: Document Reason: **NEW HIRE**

Identification Number: Document Number: **933208**

Assignment Number: Document Status: **OPEN**

Effective Date: **01-MAR-2016**

Latest Hire Date: **01-MAR-2016** Service Date: **01-MAR-2016**

Person Type: **Employee** Email Address:

Personal Employment Phonebook License Termination Schools and Colleges

Choose Country to filter School or College List Default set to USA Country: **Panama**

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
<input type="text"/>					

Search Window:

Find %

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

Find OK Cancel

Save

Note: The School and College LOV defaults to The United States, if you do not change this, you will only be able to access Institutions in the US. If the institution does not appear in the country listing, select Institution Not Available in Listing.

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

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

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

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

- Click in the **TYPE** field. Select **Other Degree (OD)** or **Highest Degree (HD)** from the LOV. A person can only have one highest degree. All others must be marked as Other Degree (OD).
- Repeat the above steps, as necessary, until all degrees are entered. Use the down arrow on the keyboard to create multiple records if necessary.

Note: Faculty/Instructor Information fields must be completed on all Faculty and Credential Staff Course Instructors. The Transcript/Official Documentation on File field must be marked YES, indicating an official transcript is on file in the appropriate Dean's office, before the ACT document will be approved by the Provost office.

- For Faculty and Credential Staff Course Instructors only. Type **Yes** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.
- Type the **appropriate Degree Discipline** as indicated on the employee's official transcript or completed Faculty Data Form, or use the LOV, to select the appropriate degree discipline.

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

- Click on Save and proceed to enter Phonebook Information; click on the **PHONEBOOK** tab.

Entering Phonebook Information

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

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

Comments:

Address Return to Previous Form Save

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

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Create Volunteer

**** 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.**

The screenshot shows the 'Data used for the UAB Electronic Directory' form. It has tabs for Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The form is divided into 'Current' and 'Proposed' sections. 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: a dropdown menu with 'Yes' selected, a text field, and another dropdown menu with 'Yes' selected. To the right of these fields is a checkbox labeled 'Assignment Job Title (Last Name, First Name)' with a note '*** Please do not add suffix'. At the bottom left is a 'Comments' field.

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

Entering License, Certification, Membership Information

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

The screenshot shows the 'License/Certificate/Membership Information' form. It has tabs for Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The form is divided into 'Current' and 'Proposed' sections. Under 'Current', there are four input fields: Type, Title, Number, and Expiration Date. Under 'Proposed', there are three input fields: a dropdown menu with '...' selected, a text field, and another text field. Below these fields is a note: 'Use down arrow to create multiple records.' At the bottom left is a 'Comments' field. At the bottom right are three buttons: 'Address', 'Return to Previous Form', and 'Save'.

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Create Volunteer

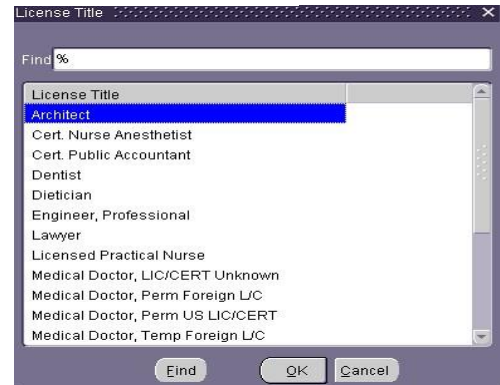
- Using the LOV in the **TYPE** field; choose the **appropriate License type**. **Note: If you**



Name
Certification
License
Membership
Professional Competency Certification

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

- If you select **Certification, Membership or Professional Competency**, you will need to type **the appropriate title** in the **TITLE** field.



License Title

Find %

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

Find OK Cancel

choose License, the Title, Number, and Expiration Date fields become required

fields. title, Click **OK**.

- Type the **License Number** in the **NUMBER** field, if applicable.
- In the **EXPIRATION DATE** field, choose the **expiration date** from the Calendar LOV or type the **date** in the **EXPIRATION DATE** field using the **dd-mmm-yy** format. **Note: This date must be a future date.**



- Click **SAVE** at the bottom of the screen; click the **ADDRESS** button to begin entering the volunteer's address information.

Entering Address and Phone Information

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The screenshot shows the 'Create Volunteer' form with three main sections: Address, Phones, and Comments.

- Address Section:** Contains fields for 'Current' and 'Proposed' addresses. Fields include Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. There is a checkbox for 'End Date Current' and a note: 'Use the down arrow to create multiple records.'
- Phones Section:** Contains a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. There are three rows for phone entries and a note: 'Use the down arrow to create multiple records.'
- Comments Section:** Includes a checkbox for 'International Address' and a large text area for 'Comments'.

At the bottom of the form are two buttons: 'Return to Previous Form' and 'Save'.

Note: All volunteers must have a local (US) address and/or campus address in order to receive correspondence. Volunteer's can change their home address through the Self Service once the Create Volunteer document is in COMPLETE status, Campus address and phone numbers must be changed via a Data Change ACT Document.

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

This screenshot shows the 'Create Volunteer' form with the 'Address Type' LOV (List of Values) open. The LOV is titled 'Address Types' and has a search bar 'Find %'. The list contains the following options: Campus Primary, Campus Secondary, Campus Tertiary, Home (highlighted in blue), and Recruiting. An arrow points from the 'Home' option in the LOV to the 'Address Type' field in the form. The form itself is partially visible, showing the 'Current' and 'Proposed' address fields.

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- Enter the **volunteer's street address** in the **ADDRESS LINE1** field. There are two additional address lines available if needed.
- 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 volunteer lives**, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

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

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

Note: If the volunteer 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

- 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**.
- 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.

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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 volunteer will be working to ensure that the volunteer receives his or her campus mail. Click **SAVE**.

The screenshot shows the 'Address' section of the form. It has two main columns: 'Current' and 'Proposed'. Under 'Current', there are fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. Under 'Proposed', there are fields for Campus Primary, NHB, 525, NEW HILLMAN BUILDING, Birmingham, AL, 35294, and 0011. A note at the bottom says 'Use the down arrow to create multiple records.'

11. Repeat the steps 6 - 10 if a Campus Secondary address is necessary.
12. To enter phone numbers for volunteer, click in the **TYPE** field located Phones region of the form.

The screenshot shows the 'Phones' section of the form. It has a table with columns: Type, Phone Number (xxxxxxxxxx), and Date From. There are three rows. The first row is highlighted in yellow. An arrow points to the 'Type' field of the first row. A note at the bottom says 'Use the down arrow to create multiple records.'

13. Type **Home** in the **TYPE** field or choose **Home** from the LOV.
14. Enter the **volunteer's ten digit home phone number** in the **PHONE NUMBER** field without dashes.
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** then click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

The screenshot shows the 'Phones' section of the form. It has a table with columns: Type, Phone Number (xxxxxxxxxx), and Date From. There are three rows. The first row is 'Home' with phone number '(205) 823-2161' and date '15-OCT-2009'. The second row is 'Campus Primary' with phone number '(205) 934-4680' and date '15-OCT-2009'. A note at the bottom says 'Use the down arrow to create multiple records.'

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Note: Repeat these steps to enter additional phone numbers for the volunteer.
Use the down arrow on your keyboard to enter multiple records, if necessary.

Entering Assignment Information

The information on the **ASSIGNMENT** form identifies the volunteer's assignment category and the organization and position number the volunteer is affiliated.

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

The screenshot displays 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, Timekeeping Organization, and Comments. The 'Proposed' section contains fields for Assignment Category (populated with '60 Volunteer'), Status (populated with 'Voluntary'), and several empty fields for Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, and Timekeeping Organization. At the bottom of the form, there are five buttons: 'Salary', 'Labor Sources', 'Element Entries', 'Return to Previous Form', and 'Save'.

2. Click in the **ORGANIZATION** field; type the **appropriate organization** in which the volunteer will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.

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General Assignment Information	
Current	Proposed
Assignment Category	60 Volunteer
Status	Voluntary
Expected Return Date	
Organization	392300000 Pathology Chair Office
Location	Bham Main Campus
Position	
Job	
Grade	
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments <input style="width: 90%;" type="text"/>	

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

General Assignment Information	
Current	Proposed
Assignment Category	60 Volunteer
Status	Voluntary
Expected Return Date	
Organization	392300000 Pathology Chair Office
Location	Bham Main Campus
Position	392300000.27601.031001
Job	RL127E0.Visiting Scientist
Grade	W.G50
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments <input style="width: 90%;" type="text"/>	

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

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Use the Find window to locate the Supervisor by entering the supervisor's last name, organization number or employee id number.

Choose the name of the appropriate Supervisor and the Supervisor Assignment # field will auto populate displaying the supervisor's employee id number.

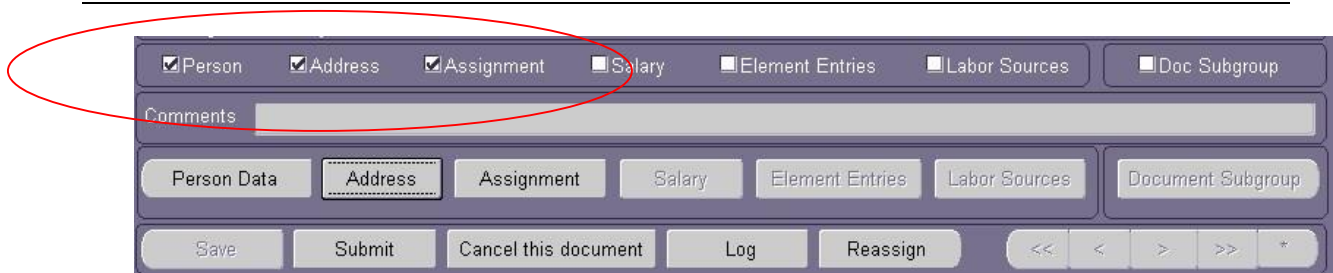
Full_Name	Assignment_Number	Job_Name	Org_Name
Employee, Employee	1555555	HR812M0.MGR-PHYSICAL THERAPY	708400000 Rehabilitation Services
Employee, Testing 1	1555551	HR206E1.PHYSICAL THERAPIST	708400000 Rehabilitation Services
Employee, Relations	1555552	AA305N0.MEDICAL & DENTAL STAF...	708100000 Quality Resources
Employee, Sample 1	1555553	AC100N1.Admin Assoc	311401000 Med - Cardiovascular D

5. Click the **SAVE** button at the bottom of the screen. **Notice the Salary, Labor Sources, and Element Entries buttons are gray (not available). Volunteers do not require information on these three forms.**
6. Click the **RETURN TO PREVIOUS** button at the bottom of the screen until you return to the **ACT MAIN FORM**.

Submitting a Create Volunteer Document

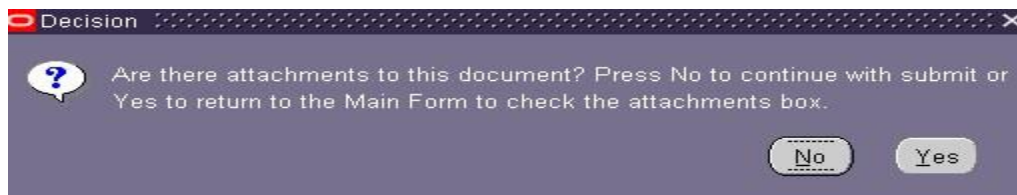
Appoint, Change and Terminate (ACT) Documentation Create Volunteer

Before submitting the **CREATE VOLUNTEER** document, verify all required information is entered and all attachments are ready to be submitted. The HR Officer submits the **CREATE VOLUNTEER** 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. At the top, there are checkboxes for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. The 'Address' checkbox is circled in red. Below these checkboxes is a 'Comments' text area. Underneath the comments area is a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom of the form are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows (<<, <, >, >>, *).

1. On the **ACT MAIN FORM**, verify checks have been inserted in the checkbox next to **PERSON, ADDRESS AND ASSIGNMENT**.
2. Before submitting the document make certain all information is correct. **You will not be able to correct information within the document after submitting.**
3. Click the **SUBMIT** button.
4. The following **DECISION** window will display. Attachments are not required for a **Create Volunteer** document; click **No** to continue with submit.



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

Note: Once the Document Status changes to READY, all fields on all the forms will turn gray (inquiry or ready only). ** BE SURE TO RECORD YOUR DOCUMENT NUMBER BEFORE YOU EXIT THE NEW HIRE DOCUMENT. You will not be able to locate the new volunteer by name, social security number, or volunteer ID number until the document has reached COMPLETE status.**

6. Once the **CREATE VOLUNTEER 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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7. The requestor of the **CREATE VOLUNTEER** document will receive email notification when the document has entered a **COMPLETE** status.

The volunteer can now create a **Blazer ID**. For information on setting up a **Blazer ID** go to BlazerID Central webpage. [Click here.](#)

[**RETURN TO TOP**](#)