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.

Creating a Create Volunteer Document 2

Entering Person Data 4

Entering Employment Information 7

Entering Schools and Colleges Information 9

Entering Phonebook Information 13

Entering License, Certification, Membership Information 14

Entering Address and Phone Information 15

Entering Assignment Information 19

Submitting a Create Volunteer Document 21

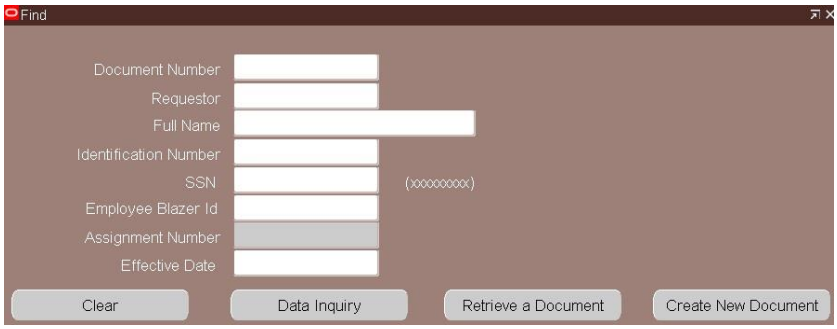
Appoint, Change and Terminate (ACT) Documentation
Create Volunteer

Creating a Create Volunteer Document

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

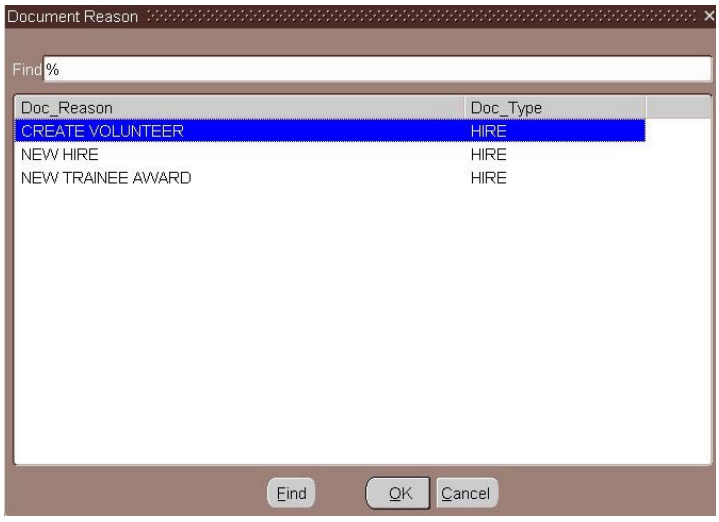
Selecting **ACT** opens the **ACT FIND** window.

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.

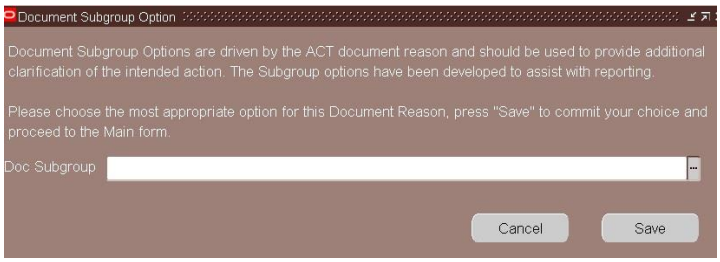
3. Choose ***Create Volunteer***, click ***OK***. Once you click OK you will be directed back to the **ACT MAIN FORM**.



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.

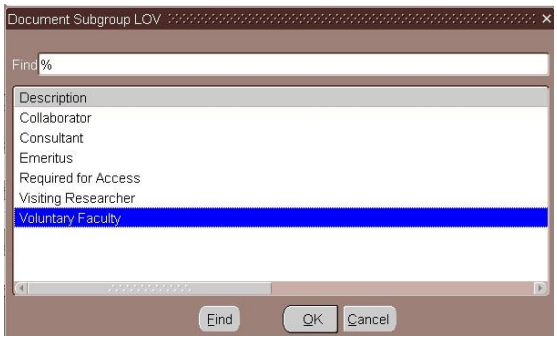
5. Click on **DOCUMENT SUBGROUP** button located in the lower right corner of the **ACT MAIN FORM**.

6. The **DOCUMENT SUBGROUP OPTION** window will open; click on **DOC SUBGROUP** field **LOV**.

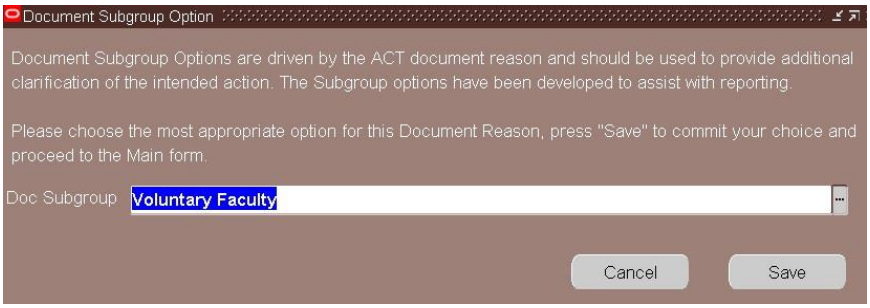


7. Select the description that best explains the nature of the transaction.

8. Click on **OK** to select.



9. 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***.

10. 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.***

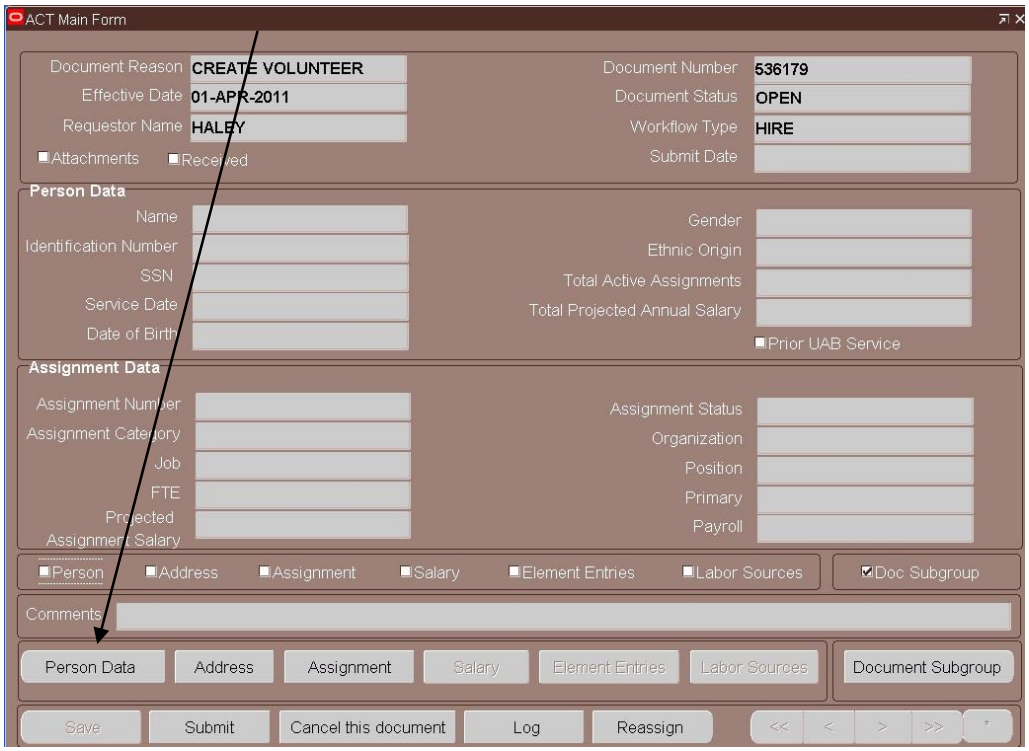
***BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE CREATE VOLUNTEER DOCUMENT*. You will not be able to locate the new volunteer by their name, social security number, or volunteer ID number until the document has reached a COMPLETE status.**

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

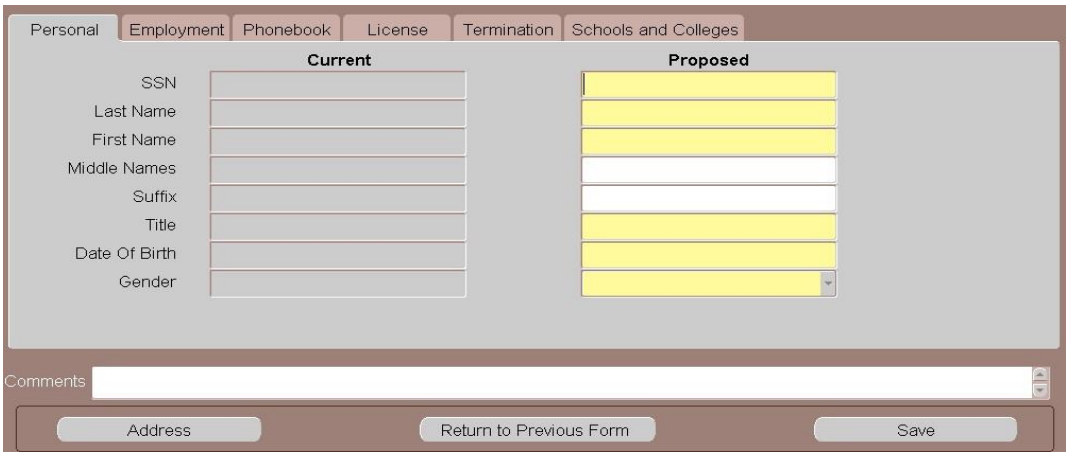
The Person Data form contains demographic information and other personal data that is grouped into five sub forms and two buttons on the ACT form. The sub forms to be completed on a **CREATE VOLUNTEER** document are **PERSONAL, EMPLOYMENT, DIRECTORY,** and **LICENSE**. The **TERMINATION** tab will not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



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



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.

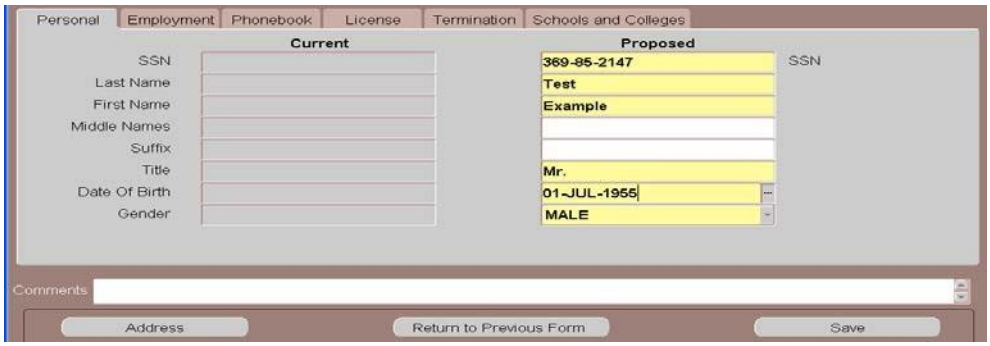
5. Enter the ***volunteer's first name*** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.

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***.

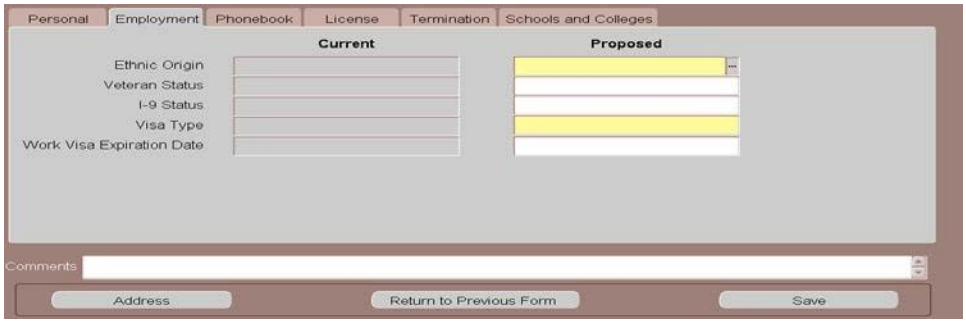
9. Click once in the **DATE OF BIRTH** Field. Enter the ***volunteer's birth date*** using the ***DDMMM-YY*** format.



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.

Entering Employment Information



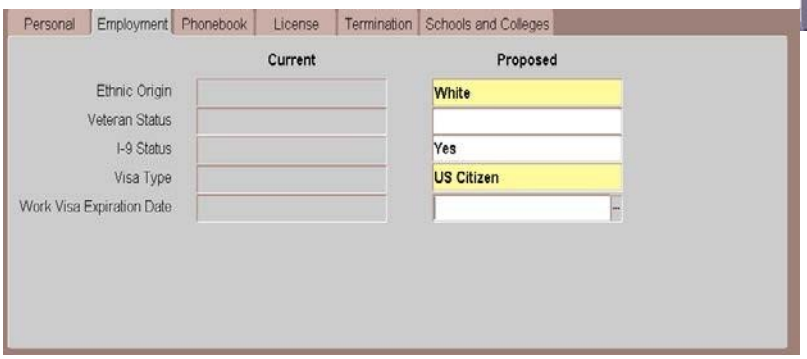
1. In the **ETHNIC ORIGIN** field, click the LOV and select the ***volunteer's ethnic origin*.** Click ***OK***.

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.***

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.**



   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.**

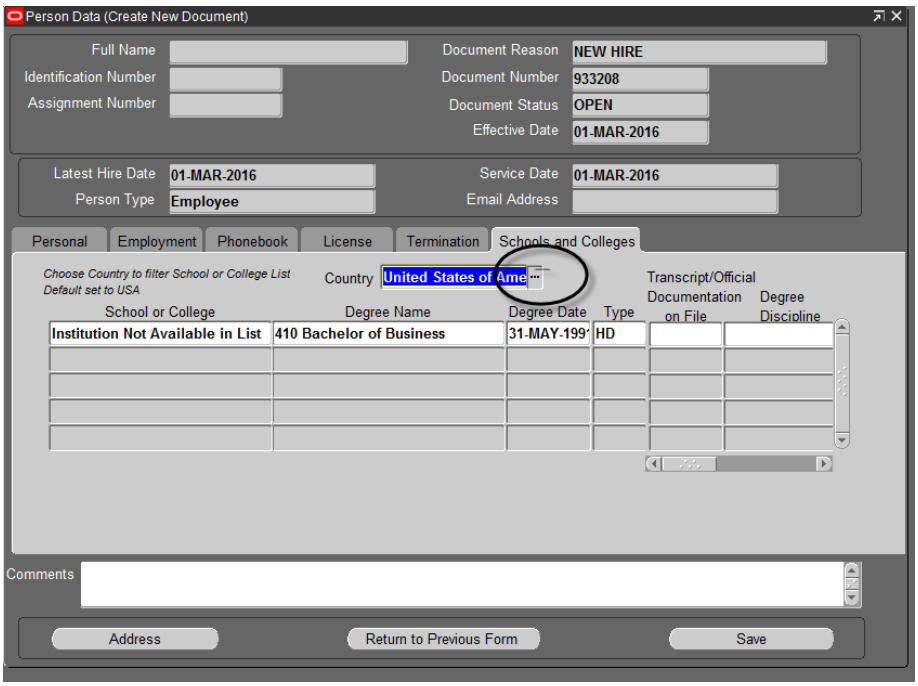
4. When required, enter future ***Work Visa Expiration Date***. Date can be typed directly into the field using the dd/mmm/yyyy and must be a ***future*** date.

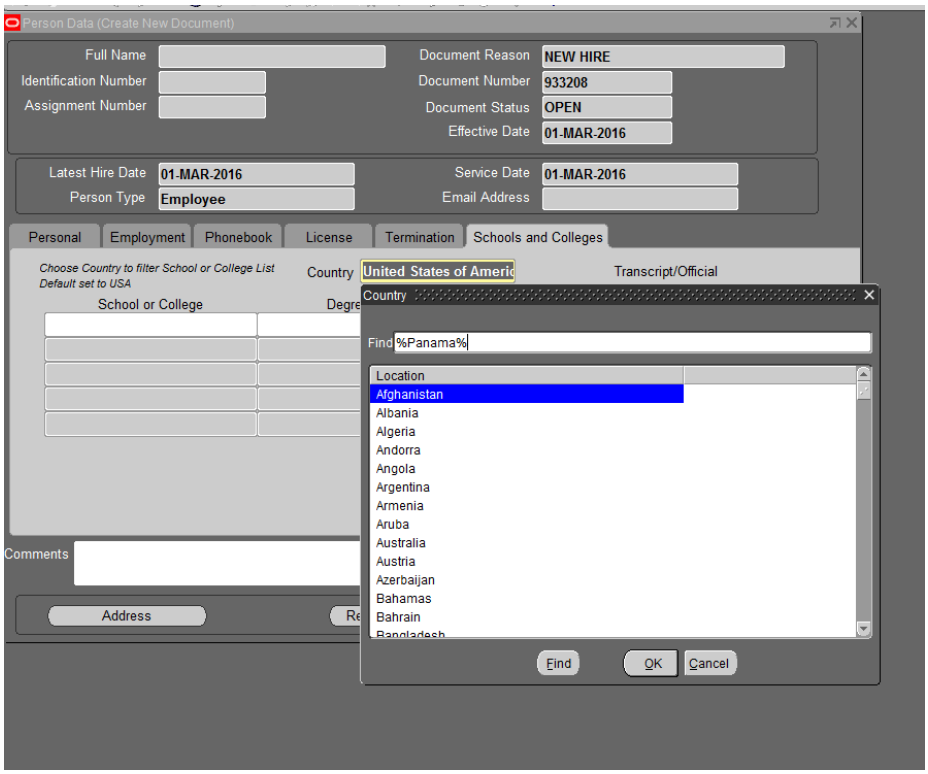
5. Click on the **SAVE** button. The following note will display. Click on OK and proceed to enter the schools and college data.

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

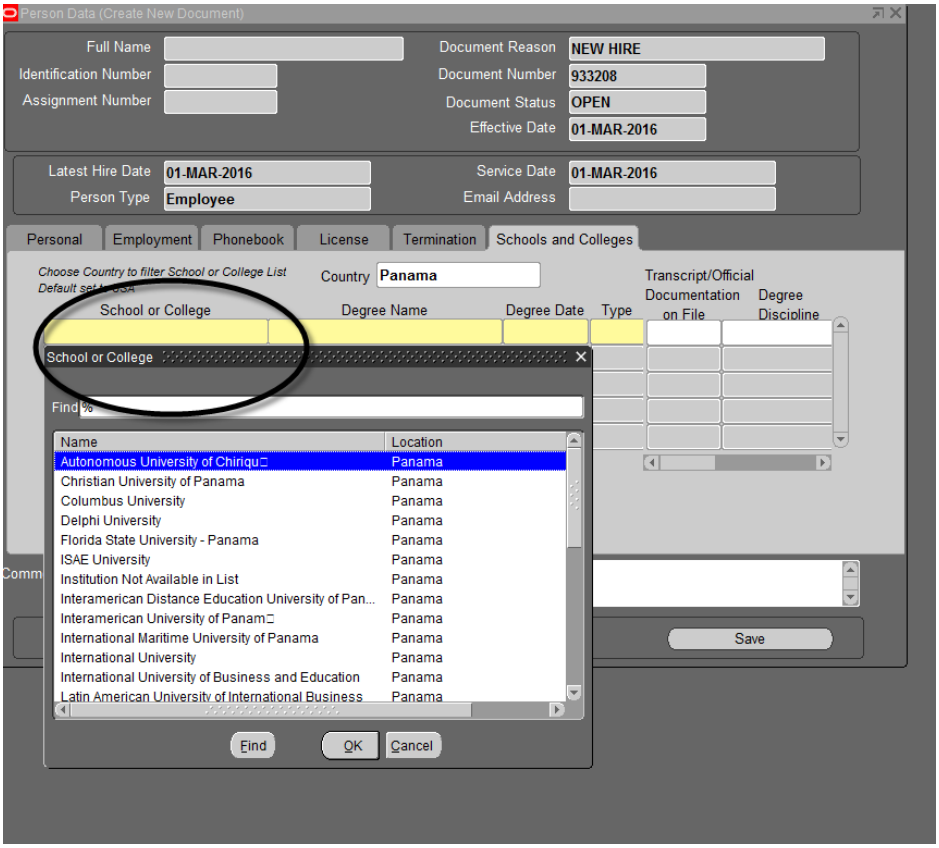
Entering Schools and Colleges Information

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



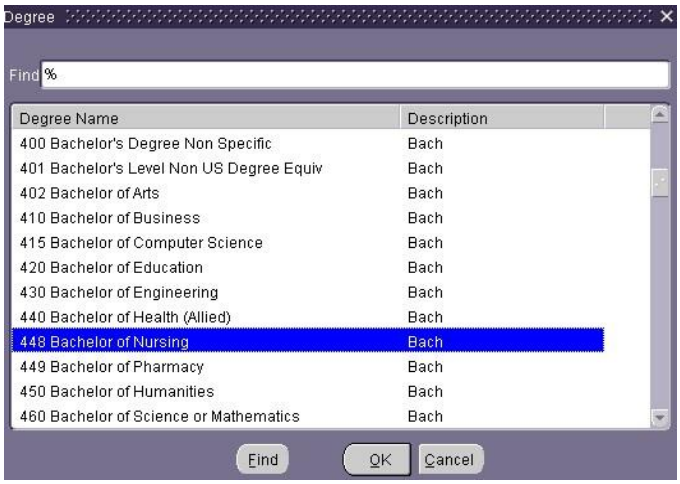


2. Click in the School or College field to pull up a list of the available Institutions in that country.



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.**



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

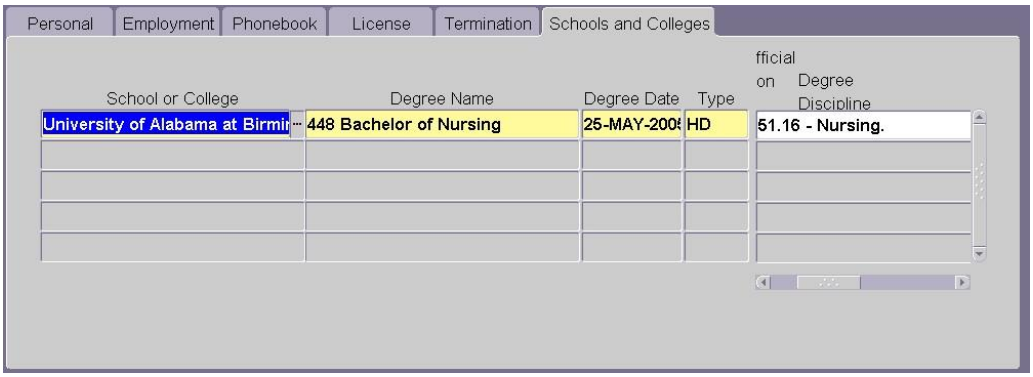
3. Click in the **TYPE** field. Select ***Other Degree* (OD)** or ***Highest Degree (HD)*** from the LOV. A person can only have one highest degree. All others must be marked as Other Degree (OD).

4. 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.

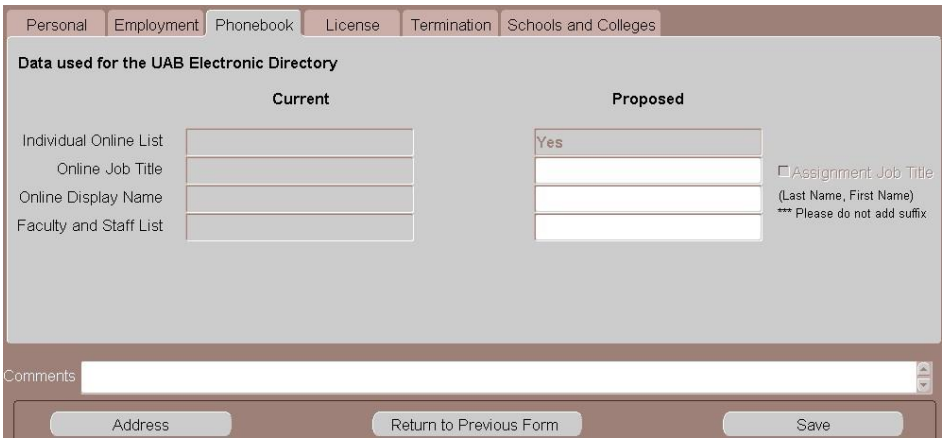
5. For Faculty and Credential Staff Course Instructors only. Type ***Yes*** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.

6. 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.



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

Entering Phonebook Information



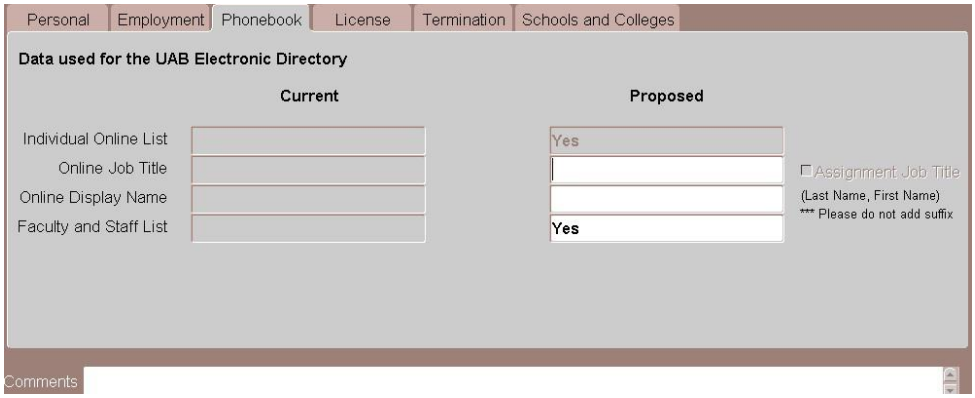
1. **INDIVIDUAL ONLINE LIST** field defaults to **Yes**. All employees will be listed in the UAB Electronic phonebook.

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. ****

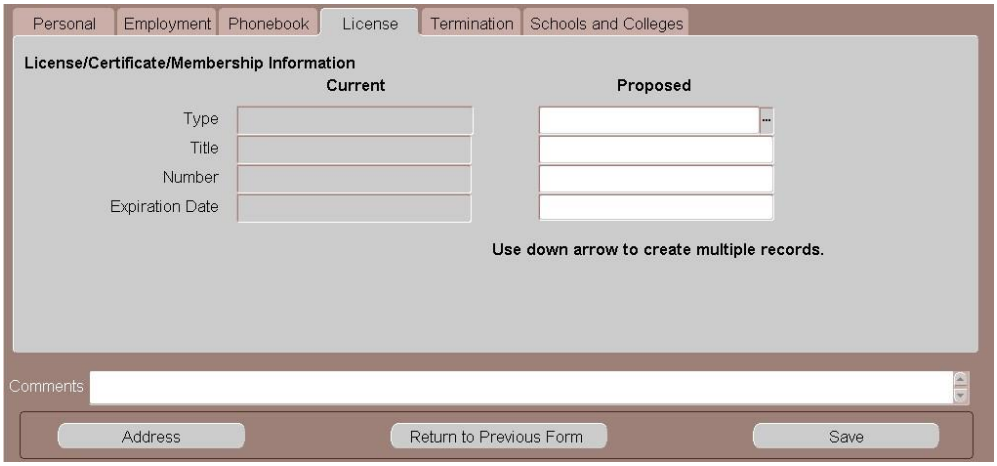
*** After December 2009, the white pages section of the UAB "paper" Phonebook will be made available online as a pdf. Faculty and Staff employees with "Yes" in the Faculty and Staff List field will be included in the online pdf.*



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

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.***



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

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

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

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

fields. title, Click **OK**.

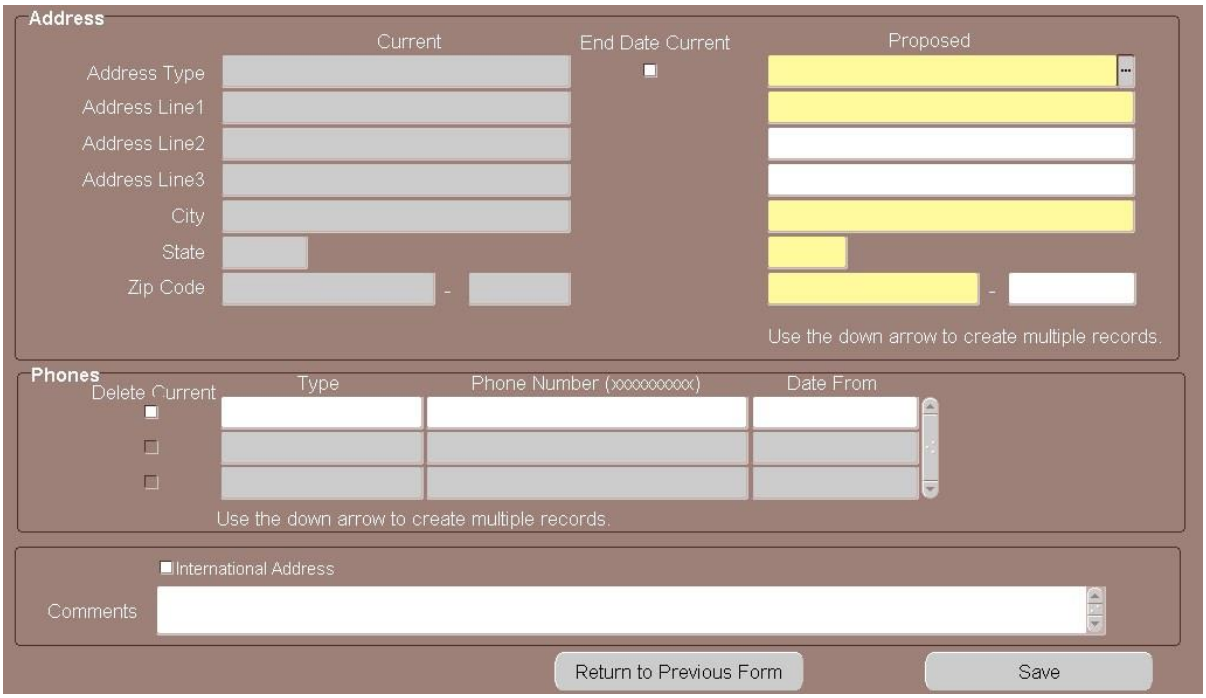
5. Type the ***License Number*** in the **NUMBER** field, if applicable.

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.***

◄

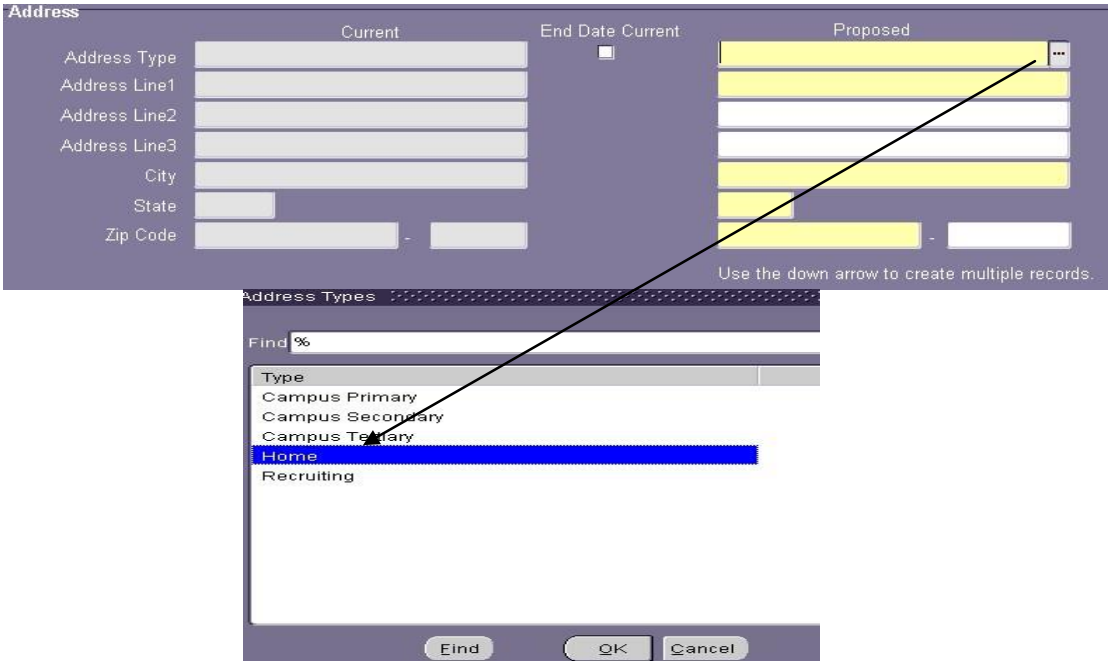
7. Click **SAVE** at the bottom of the screen; click the **ADDRESS** button to begin entering the volunteer's address information.

Entering Address and Phone Information



***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.**



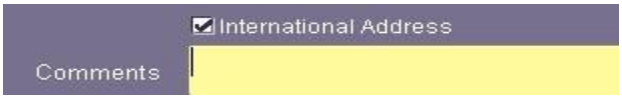
2. Enter the ***volunteer's street address*** in the **ADDRESS LINE1** field. There are two additional address lines available if needed.

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 volunteer lives***, and click **OK**. A listing of City, State, Zip Start, Zip End and County will appear.

4. 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.

5. 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.



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.**

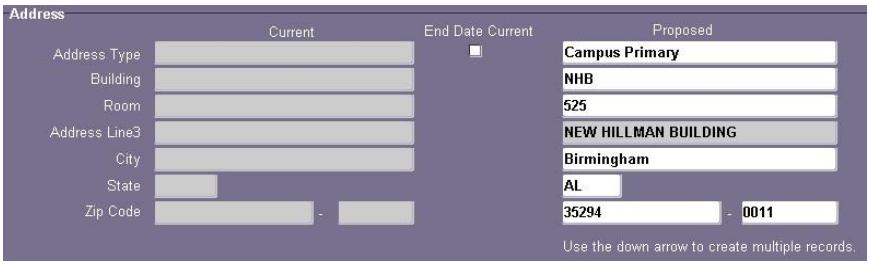
7. Enter the ***two letter building code*** in the **BUILDING** field. Click in the **ROOM NUMBER** field, the **ADDRESS LINE3** field will populate with the UAB building associated with the two letter code entered.

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.

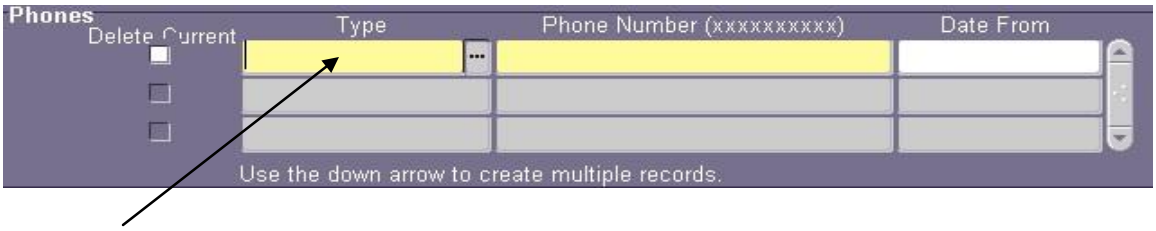
9. In the **CITY** field, type in the ***name of the city*** in which the UAB building is located. The **CITIES** LOV will open***;*** select the ***correct Zip Start-Zip End*** range for the UAB building selected. Click **OK**.

10. Enter the ***four-digit zip code extension*** for the department in which the volunteer will be working to ensure that the volunteer receives his or her campus mail. Click **SAVE.**



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.



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***.

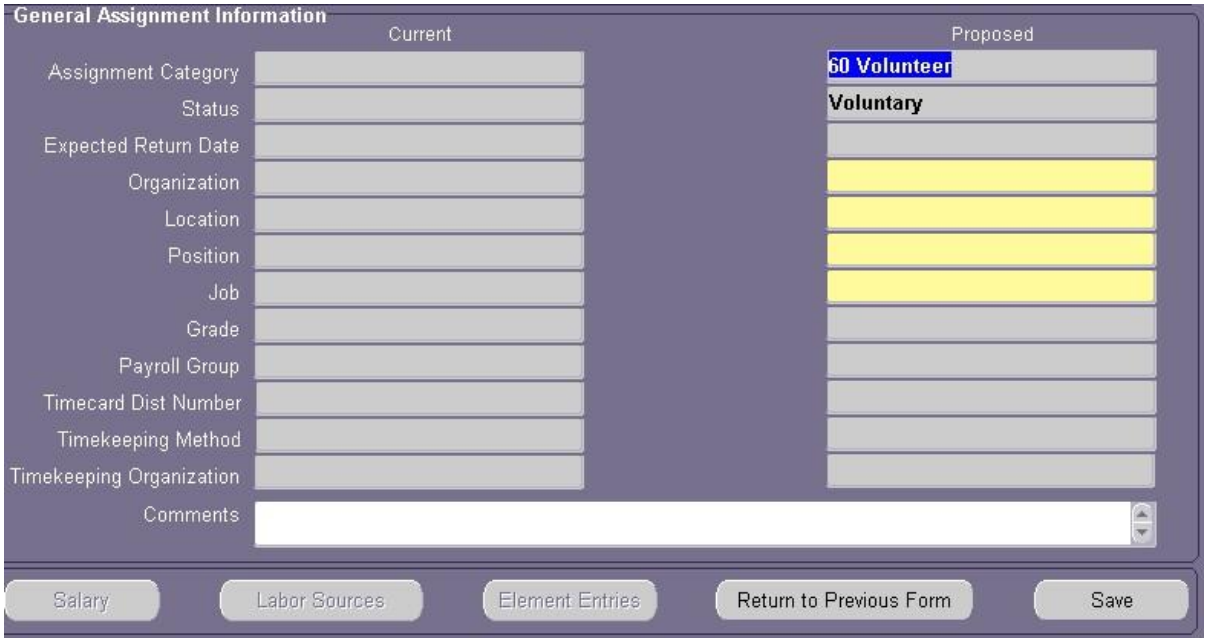
18. Type the ***effective start date*** in the **DATE FROM** field or use the Calendar LOV. ***Usually this is the effective date of the document***. Click the **SAVE** then click on the **RETURN TO PREVIOUS** button to return to the **ACT MAIN FORM**.

***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**.

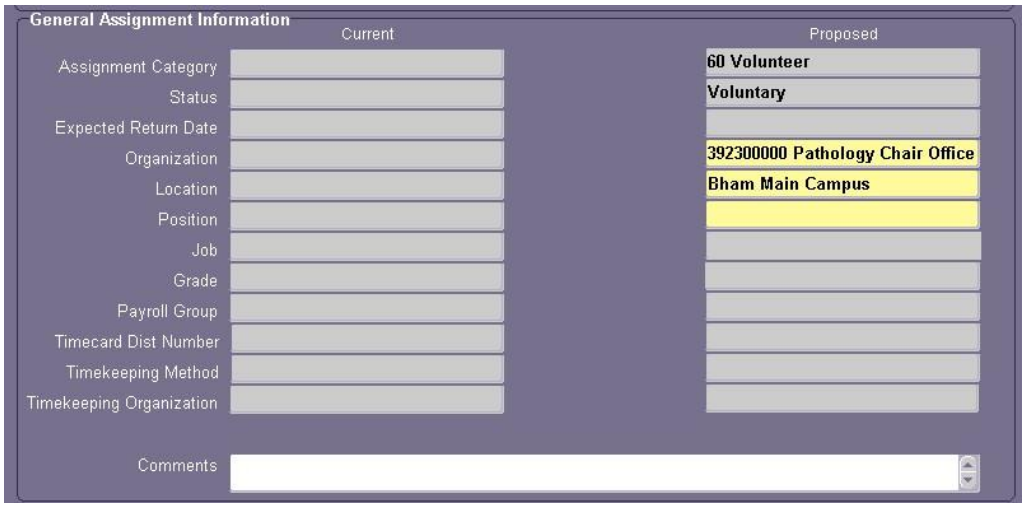
Entering Assignment Information

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.

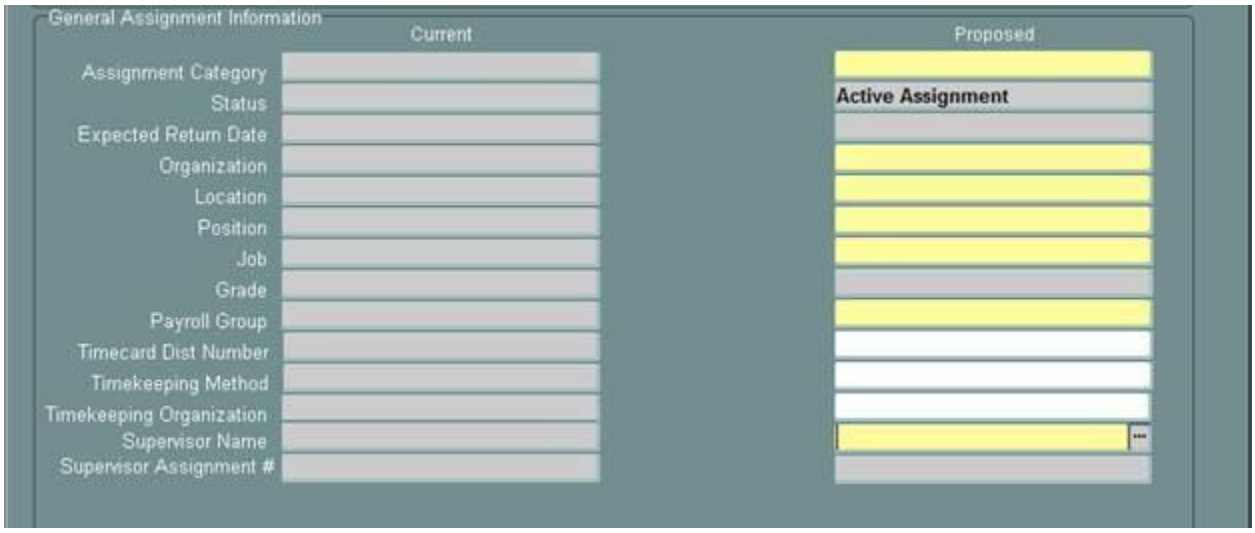


2. Click in the **ORGANIZATION** field; type the ***appropriate organization*** in which the volunteer will be affiliated. Press **ENTER**. The **LOCATION** field will automatically populate, or use the Location LOV to select location.

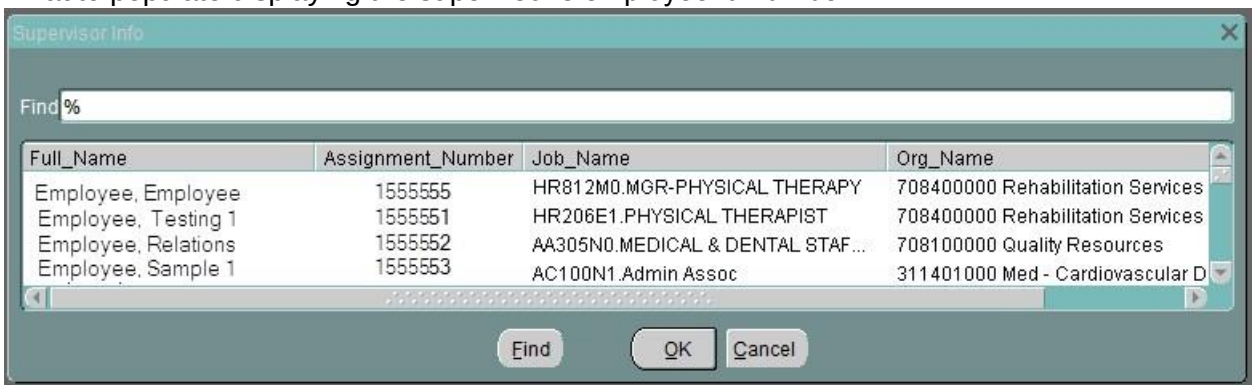


3. Click in the **POSITION** field, select the ***position code*** from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization - both vacant and filled. By entering the correct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

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



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.



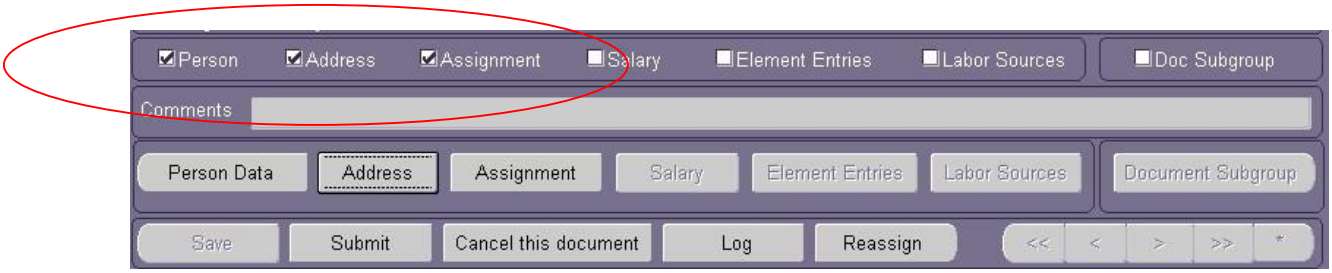
5. Click the **SAVE** button at the bottom of the screen. **Notice the Salary, Labor Sources, and Element Entries buttons are gray (not available). Volunteers do not require information on these three forms.**

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.

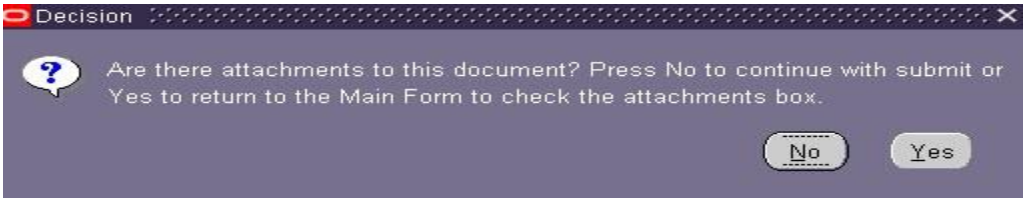


1. On the **ACT MAIN FORM,** verify checks have been inserted in the checkbox next to **PERSON, ADDRESS AND ASSIGNMENT**.

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**.

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