

Appoint, Change and Terminate (ACT) Documentation

New Hire ACT Document

The **New Hire** ACT document reason is used to **appoint new employees** who have **never** been affiliated with UAB in an active employee, trainee or volunteer status in the past.

The information entered on the **New Hire** document provides the data needed for the employee to be paid. It also creates the official personnel record for that individual. While it may seem to be a rather lengthy process, much of the data is used for reporting throughout the University and to external agencies. Therefore, providing as much data as possible and ensuring its accuracy is important. It is recommended before starting this procedure, you have all of the relevant information in front of you, and that you complete it in sequential order.

Instructions for completing each form on the New Hire Document can be accessed by scrolling to the referenced page number.

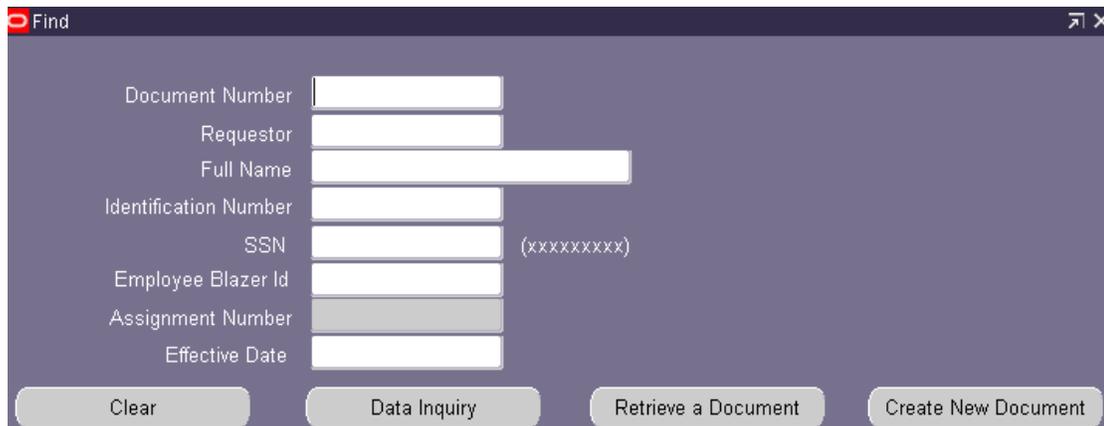
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UAB HR Officer → HR Transactions → ACT → Find Window

Creating a New Hire ACT Document

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

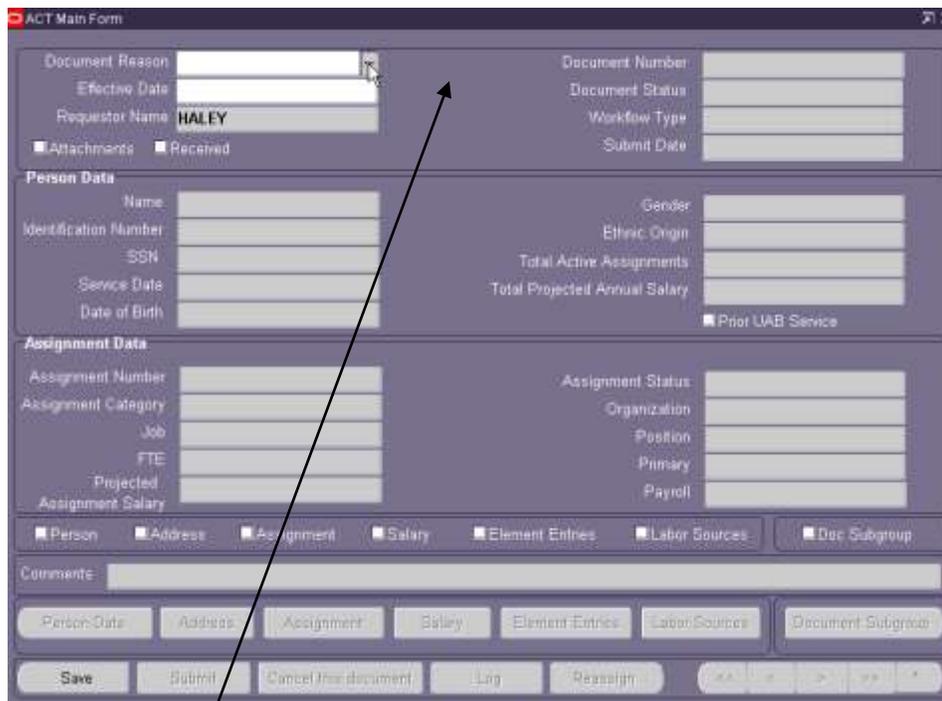


The screenshot shows the 'Find' window with the following fields and buttons:

Document Number	<input type="text"/>
Requestor	<input type="text"/>
Full Name	<input type="text"/>
Identification Number	<input type="text"/>
SSN	<input type="text"/> (xxxxxxxx)
Employee Blazer Id	<input type="text"/>
Assignment Number	<input type="text"/>
Effective Date	<input type="text"/>

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 screenshot shows the 'ACT Main Form' window with the following sections and fields:

Document Reason (LOV box), Effective Date, Requestor Name (HALEY), Attachments, Received

Document Number, Document Status, Workflow Type, 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 for document, Log, Reassign

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

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4. The **DOCUMENT REASON** window displays. Select **NEW HIRE** and click **OK**.

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

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

Calendar

March 2011

S M T W T F S

27 28 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31 1 2

3 4 5 6 7 8 9

01-MAR-2011

OK Cancel

6. Click in the **ATTACHMENTS** checkbox; a check mark now appears which indicates attachments **will be** accompanying the New Hire document. For a list of **Attachments** to accompany a **New Hire** document, [click here](#).

ACT Main Form

Document Reason NEW HIRE

Effective Date 01-MAR-2011

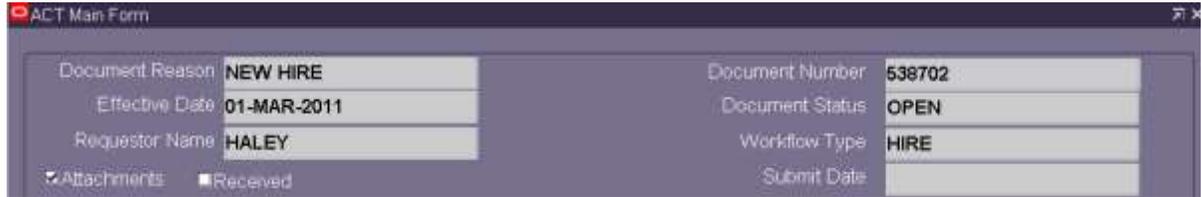
Requestor Name HALEY

Attachments Received

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7. Click **SAVE** at the bottom of the form. The system will assign a **Document Number** and the **DOCUMENT STATUS** is now **OPEN**.

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.



The screenshot shows a software window titled "ACT Main Form". It contains several input fields and checkboxes. On the left side, there are three rows of text labels followed by input boxes: "Document Reason" with "NEW HIRE", "Effective Date" with "01-MAR-2011", and "Requestor Name" with "HALEY". Below these are two checkboxes: "Attachments" (checked) and "Received" (unchecked). On the right side, there are four rows of text labels followed by input boxes: "Document Number" with "538702", "Document Status" with "OPEN", "Workflow Type" with "HIRE", and "Submit Date" which is empty.

BE SURE TO RECORD THE DOCUMENT NUMBER BEFORE EXITING THE NEW HIRE DOCUMENT. You will not be able to locate the new employee by name or social security number until the New Hire document has entered **COMPLETE** status.

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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**, **DIRECTORY**, and **LICENSE**; when necessary, the **TERMINATION** form. The two buttons contain Address and Schools and Colleges data.

Entering Person Data Information

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

The screenshot displays the 'ACT Main Form' interface. At the top, there are fields for 'Document Reason' (NEW HIRE), 'Effective Date' (01-MAR-2011), 'Requestor Name' (HALEY), 'Document Number' (538702), 'Document Status' (OPEN), 'Workflow Type' (HIRE), and 'Submit Date'. Below this is the 'Person Data' section, which includes fields for Name, Identification Number, SSN, Service Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Projected Annual Salary, and Prior LIAB Service. The 'Assignment Data' section follows, with fields for Assignment Number, Assignment Category, Job, FTE, Projected Assignment Salary, Assignment Status, Organization, Position, Primary, and Payroll. At the bottom, there are tabs for 'Person', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Doc Subgroup'. The 'Person' tab is currently selected. Below the tabs is a 'Comments' field and a row of buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the very bottom, there are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

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Entering Personal Information

1. The **PERSON DATA FORM** opens. **Required fields are yellow and must be completed before saving the form.**

Person Data (Create New Document)

Full Name: Document Reason: NEW HIRE
Identification Number: Document Number: 538702
Assignment Number: Document Status: OPEN
Effective Date: 01-MAR-2011

Latest Hire Date: 01-MAR-2011 Service Date: 01-MAR-2011
Person Type: Employee Email Address:

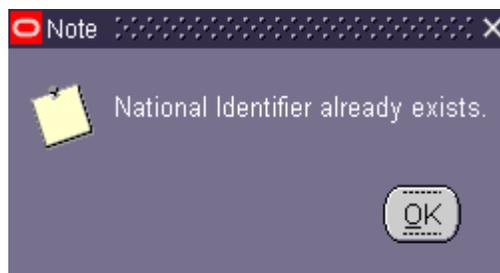
Personal | Employment | Phonebook | License | Termination | Schools and Colleges

	Current	Proposed
SSN	<input type="text"/>	<input type="text"/>
Last Name	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Middle Names	<input type="text"/>	<input type="text"/>
Suffix	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>
Date Of Birth	<input type="text"/>	<input type="text"/>
Gender	<input type="text"/>	<input type="text"/>

Comments:

Address | Return to Previous Form | Save

2. Enter the **employee's Social Security number/ITIN/Temporary Identification 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 employee's social security number, the employee's personal data already exists in the Administrative Systems. A **Rehire** document will have to be completed on this employee. For instructions on completing a **Rehire** Document [click here](#).

3. Enter the **employee's last name** exactly as it should appear in the **LAST NAME** field. **Remember this is the employee's official UAB electronic document. The FIRST letters of all names are to be capitalized; REMAINING letters are to be lower case.** Press **TAB** or click in the next field.

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4. Enter the **employee's first name** exactly as it should appear in the **FIRST NAME** field. Press **TAB** or click in the next field.
5. Enter the **employee's middle name**, if known, in the **MIDDLE NAME** field. Press **TAB** or click in the next field.
6. Enter the **employee's suffix**, in the **SUFFIX** field if applicable. **Example: Sr., Jr., III, etc.** Press **TAB** or click in the next field.
7. 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.**
8. Click once in the **DATE OF BIRTH** Field. Enter the **employee's birth date** using the **DD-MMM-YY** format.
9. Click the **SAVE** button at the bottom of the form.

	Current	Proposed
SSN		222-11-3333
Last Name		Example
First Name		One
Middle Names		
Suffix		
Title		Mr.
Date Of Birth		16-APR-1978
Gender		MALE

Comments: _____

Address Return to Previous Form Save

10. Once you click the **SAVE** button, the screen will advance to the **EMPLOYMENT** Tab.

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Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT system. It features two columns: 'Current' and 'Proposed'. The 'Proposed' column has yellow highlights in the 'Ethnic Origin', 'Veteran Status 100', and 'Veteran Status 100A' rows. A button labeled 'More info on Veteran Status' is located to the right of the 'Proposed' column. Below the main form is a 'Comments' section.

1. 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.

This screenshot shows the 'Ethnic Origin' LOV. It has a search bar at the top with 'Find %' and a list of options below. The first option, 'American Indian or Alaskan Native', is highlighted in blue. At the bottom, there are 'Find', 'OK', and 'Cancel' buttons.

2. Click in the **VETERANS STATUS 100A** field, **Not a Veteran** will automatically default; however, if the employee has presented a completed **"Invitation to Self Identify Form"** click the **LOV** for veteran status options and select the correct veteran status. To see reporting requirements and veteran status definitions click on the **"More info on Veteran Status"** button. Once the appropriate veteran status is selected, click **OK**.

This screenshot shows the 'Veteran Status' LOV. It has a search bar at the top with 'Find %' and a list of options below. The option 'Not a Veteran' is highlighted in blue. At the bottom, there are 'Find', 'OK', and 'Cancel' buttons.

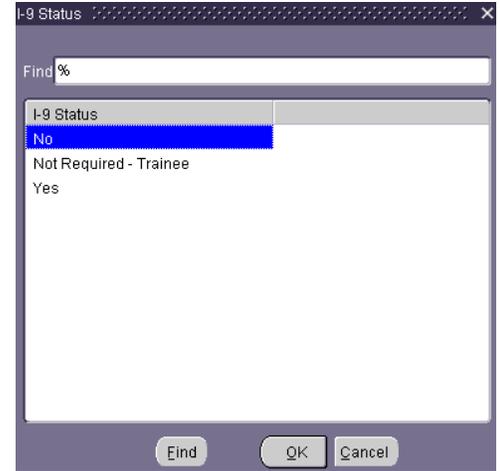
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3. In the **I-9 STATUS** field, click the LOV and select the appropriate I-9 Status from the list. Click **OK**. For information regarding I-9's go to Records Administration webpage.

Copy & paste link into URL:

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:

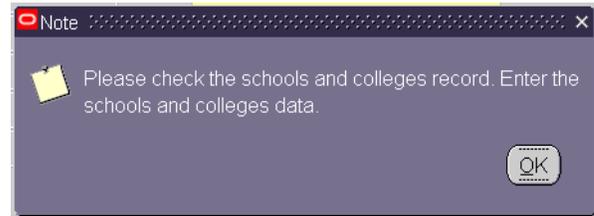
<http://main.uab.edu/Sites/students/53998/>

5. 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.

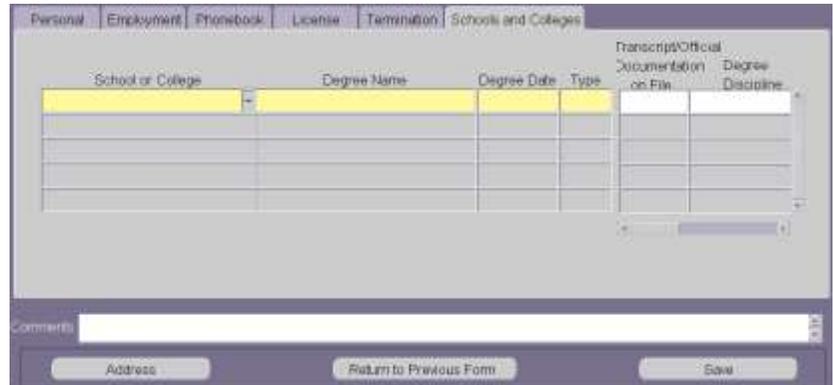


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6. Click on the **SAVE** button. The following note will display. Click on OK and proceed to enter the schools and college data.



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



A screenshot of the 'Schools and Colleges' tab in the ACT documentation software. The interface includes a tabbed menu at the top with 'Personal', 'Employment', 'Phonebook', 'License', 'Termination', and 'Schools and Colleges'. Below the tabs is a table with the following columns: 'School or College', 'Degree Name', 'Degree Date', 'Type', 'Transcript/Official Documentation on File', and 'Degree Discipline'. The first row of the table is highlighted in yellow. Below the table is a 'Comments' text area. At the bottom of the window are three buttons: 'Address', 'Return to Previous Form', and 'Save'.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline

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Entering Schools and Colleges Information

1. Type in the ***name of the school or college*** or select it from the LOV.

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

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

2. 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.

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
480 Bachelor of Science or Mathematics	Bach

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

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

4. 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).
5. 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.

6. For Faculty and Credential Staff Course Instructors only. Type **Yes** in the **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE** field or use the LOV.
7. 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.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
University of Alabama at Birmingham	448 Bachelor of Nursing	25-MAY-2006	HD		51.16 - Nursing

8. Click on Save.

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Entering Phonebook Information

The screenshot shows a web form titled "Data used for the UAB Electronic Directory" with two columns: "Current" and "Proposed". The "Proposed" column has a dropdown menu with "Yes" selected. To the right of the "Proposed" column is a checkbox for "Assignment Job Title" and a note "(Last Name, First Name) *** Please do not add suffix". Below the form is a "Comments" field and three buttons: "Address", "Return to Previous Form", and "Save".

1. **INDIVIDUAL ONLINE LIST** field defaults to **Yes**. All employees will be listed in the UAB Electronic phonebook.
2. Click in the **ONLINE JOB TITLE** field **only** if the employee's title to be listed in either the UAB paper phonebook or electronic phonebook is **different** than the assigned job title. Enter the **desired job title**.
3. Click in the **ONLINE DISPLAY NAME** field **only** if the employee's name is to be listed in either the UAB paper phonebook or electronic phonebook **differently** than what was entered on the **PERSONAL** Tab. **The proper format for this field is: last name, first name. No space between the comma and first name.**
4. Click the **LOV** in the **FACULTY AND STAFF LIST** field. Choosing **Yes** will include the employee in the UAB paper phonebook listing; choosing **No** will exclude the employee. Click **OK**. **

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

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

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Entering License, Certification, Membership Information

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

The screenshot shows a software interface with several tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The 'License' tab is selected. The main area is titled 'License/Certificate/Membership Information' and is divided into two columns: 'Current' and 'Proposed'. Each column has four input fields: 'Type', 'Title', 'Number', and 'Expiration Date'. Below these fields, a note says 'Use down arrow to create multiple records.' At the bottom of the form, there is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

2. Using the LOV in the **TYPE** field; choose the **appropriate License type**. **Note: If you choose License, the Title, Number, and Expiration Date fields become required fields.**

A vertical list of values for the 'TYPE' field. The options are: Name, Certification, License (highlighted in blue), Membership, and Professional Competency Certification.

3. If you select **License**, a form listing of **LICENSE TITLES** appears.

A dialog box titled 'License Title' with a search field labeled 'Find %'. Below the search field is a list of license titles. 'Architect' is selected and highlighted in blue. Other titles include: Cert. Nurse Anesthetist, Cert. Public Accountant, Dentist, Dietician, Engineer, Professional, Lawyer, Licensed Practical Nurse, Medical Doctor, LIC/CERT Unknown, Medical Doctor, Perm Foreign LIC, Medical Doctor, Perm US LIC/CERT, and Medical Doctor, Temp Foreign LIC. At the bottom are buttons for 'Find', 'OK', and 'Cancel'.

Select the appropriate **License title**,
Click **OK**.

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4. If you select ***Certification, Membership or Professional Competency***, you will need to type ***the appropriate title*** in the **TITLE** field.
5. Type the ***License Number*** in the **NUMBER** field, if applicable.
6. In the **EXPIRATION DATE** field, choose the ***expiration date*** from the Calendar LOV or type the ***date*** in the **EXPIRATION DATE** field using the ***dd-mmm-yy*** format. **Note: *This date must be a future date.***
7. Click **SAVE** at the bottom of the form; click on the **ADDRESS** button to begin entering the employee's address information.

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Entering Address and Phone Information

The screenshot shows the 'Address' and 'Phones' sections of the ACT system. The 'Address' section has two columns: 'Current' and 'Proposed'. The 'Current' column has fields for Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. The 'Proposed' column has a dropdown menu for Address Type and corresponding fields for Address Line1, Address Line2, Address Line3, City, State, and Zip Code. There is an 'End Date Current' checkbox. Below the address fields is a note: 'Use the down arrow to create multiple records.' The 'Phones' section has a 'Delete' checkbox and a table with columns: 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. There are three rows in the table. Below the phone table is another note: 'Use the down arrow to create multiple records.' At the bottom, there is an 'International Address' checkbox and a 'Comments' text area.

Note: All employees must have a local (US) address and/or campus address in order to receive correspondence. Employee's can change their home address through the Self Service once their New Hire 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 'Address' section of the form with a dropdown menu open for the 'Address Type' field. The dropdown menu is titled 'Address Types' and has a search field 'Find %'. The list of address types includes: 'Campus Primary', 'Campus Secondary', 'Campus Tertiary', 'Home', and 'Recruiting'. The 'Home' option is highlighted in blue. A black arrow points from the 'Home' option in the dropdown to the 'Address Type' field in the main form above.

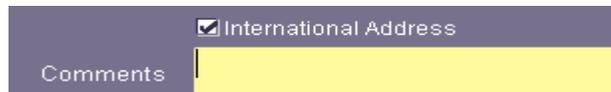
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2. Enter the **employee's street address** in the **ADDRESS LINE1** field. There are two more address lines available if needed.
3. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type **the name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

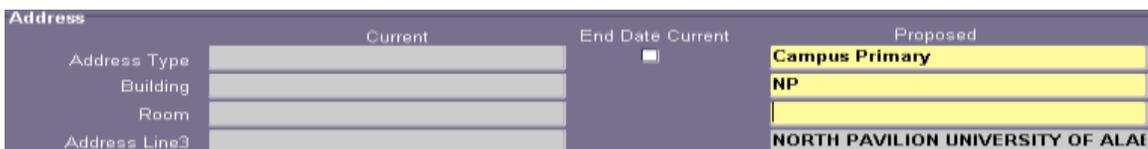


4. Highlight the **correct zip code range** for the city and county in which the employee lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

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.



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.



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

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

The screenshot shows the 'Address' section of a form. It is divided into 'Current' and 'Proposed' columns. The 'Current' column has fields for Address Type, Building, Room, Address Line3, City, State, and Zip Code. The 'Proposed' column has fields for Campus Primary, NP, 5771, NORTH PAVILION UNIVERSITY OF ALABAMA, Birmingham, AL, 35294, and 6950. A note at the bottom right says 'Use the down arrow to create multiple records.'

12. To enter both Home and Campus phone numbers, click in the **TYPE** field located in the Phones region of the form.

The screenshot shows the 'Phones' section of a form. It has a table with columns: Delete, Current, Type, Phone Number (xxxxxxxx), and Date From. The first row is highlighted in yellow. An arrow points to the 'Type' field in 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 **employee's ten digit home phone number** in the **PHONE NUMBER** field without dashes.

This is a close-up of the first row in the 'Phones' table. The 'Type' field contains the word 'Home'. The 'Phone Number' field contains '(205) 666-4444'. The 'Date From' field contains '01-OCT-2009'.

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**.

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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**.

Phones		Type	Phone Number (xxxxxxxxxx)	Date From
Delete Current	<input type="checkbox"/>	Campus Primary	(205) 934-4564	01-OCT-2009
	<input type="checkbox"/>	Home	(205) 666-4444	01-OCT-2009
	<input type="checkbox"/>			

Use the down arrow to create multiple records.

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

19. Click the **SAVE** button; then click return to **RETURN PREVIOUS FORM** button. This will take you back to the **PERSON DATA FORM**.
20. Click **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA FORM** to return to the **ACT MAIN FORM**.
21. Click the **ASSIGNMENT** button at the bottom of the **ACT MAIN FORM**.

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The information on the **ASSIGNMENT** form identifies the employee's employment status, which determines eligibility for employee benefits, the organization and position number the employee is affiliated with, and the timekeeping method used in submitting an employee's worked time to payroll.

Entering Assignment Form Information

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

General Assignment Information

Current	Proposed
Assignment Category	[Dropdown Arrow]
Status	Active Assignment
Expected Return Date	
Organization	
Location	
Position	
Job	
Grade	
Payroll Group	
Timecard Dist Number	
Timekeeping Method	
Timekeeping Organization	
Comments	

2. Select the **appropriate assignment category** from the **ASSIGNMENT CATEGORY LOV**. For a listing of UAB Assignment categories [click here](#). (You and UAB Section 2.1) Click **OK**.

Assignment Categories

Find %

Employment Category
01 Regular FT
02 Temporary FT
03 Regular P I
04 Irregular
06 Student
07 Resident
11 Federal/Work Study

Find OK Cancel

Note: When either the **06 Student** or **11 Work Study Student** assignment categories is selected, return to the **Person Data Form** and enter the student's **Blazer ID** in the required **BLAZER ID** field.

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

General Assignment Information		Current	Proposed
Assignment Category			01 Regular FT
Status			Active Assignment
Expected Return Date			
Organization			329800000 Periodontology
Location			Bham Main Campus
Position			
Job			
Grade			
Payroll Group			
Timecard Dist Number			
Timekeeping Method			...
Timekeeping Organization			

- 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			01 Regular FT
Status			Active Assignment
Expected Return Date			
Organization			329800000 Periodontology
Location			Bham Main Campus
Position			329800000.86301.031001
Job			HD030N0.Dental Hygienist
Grade			W.G12

- Select the **appropriate payroll group** from the **PAYROLL GROUP** LOV. Click **OK**

Note: Faculty 12 = Faculty who work 12 months of the year. Faculty 9 = Faculty who work 9 months of the year. Staff 12 = Staff who work 12 months of the year. Staff 9 = Staff who work 9 months of the year.

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6. If this is a biweekly assignment, enter the employee's timekeeping information.
 - a. If your organization has designated several timekeeper approvers, the Workflow Officer for your organization may have assigned Timecard Distribution Numbers to each timekeeper. If your timekeepers have these numbers, enter the **timecard distribution number** of the person to whom this employee's timesheet should be distributed to in the **TIMECARD DIST NUMBER** field.
 - b. Enter **TAMS** (Hospital employees), **DB** (Design Build employees) or **TEL** (Time Entry, and Labor for the rest of the campus) in the **TIMEKEEPING METHOD FIELD** or use the LOV to enter the information.
 - c. If the timekeeping organization is different from the appointing organization, enter the **organization** in the **TIMEKEEPING ORGANIZATION** field or select it from the LOV.
7. If this is a monthly assignment, leave the above three fields blank.
8. Click the **SAVE** button at the bottom of the form.

The screenshot shows a web-based form titled "General Assignment Information". It is divided into two columns: "Current" and "Proposed". The "Current" column contains several empty text input fields for the following fields: Assignment Category, Status, Expected Return Date, Organization, Location, Position, Job, Grade, Payroll Group, Timecard Dist Number, Timekeeping Method, and Timekeeping Organization. The "Proposed" column contains a list of values for the same fields: 01 Regular FT, Active Assignment, 329800000 Periodontology, Bham Main Campus, 329800000.86301.031001, HD030NO.Dental Hygienist, W.G12, Staff 12, and TEL. At the bottom of the form is a "Comments" text area and two buttons: "Return to Previous Form" and "Save".

Current	Proposed
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	
Organization	329800000 Periodontology
Location	Bham Main Campus
Position	329800000.86301.031001
Job	HD030NO.Dental Hygienist
Grade	W.G12
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Comments	

9. Click the **RETURN TO PREVIOUS FORM** button located at the bottom of the form and return to the **ACT MAIN FORM**.
10. Click on the **SALARY** button at the bottom of the **ACT MAIN FORM**.

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The **SALARY** form should be completed before entering the **Labor Sources** data.

Entering Salary Form Information

1. Click the **SALARY** button at the bottom of the **ASSIGNMENT FORM** or the **ACT MAIN FORM**. This will open the **SALARY** Form.

Note: The yellow required field or fields in the **PROPOSED** section must be completed first. The yellow required fields will be different according to your organization. For Hospital organizations the Hosp Calc Code field will be yellow. For University organizations the Salary Basis field will be yellow.

Component Reasons			
	Reason	Change Value	Change %

Change value = Full hourly rate of pay.

Use the down arrow to create multiple records.

	Current	Proposed
Projected Assignment Salary		
Actual Assignment Rate of Pay		
FTE		
Hosp Calc Code		
Premium Plan		
Salary Basis		HOURLY
Payroll		Biweekly
Outside Income Source		
Outside Income		(Annual)
CFB Code		
Comments		

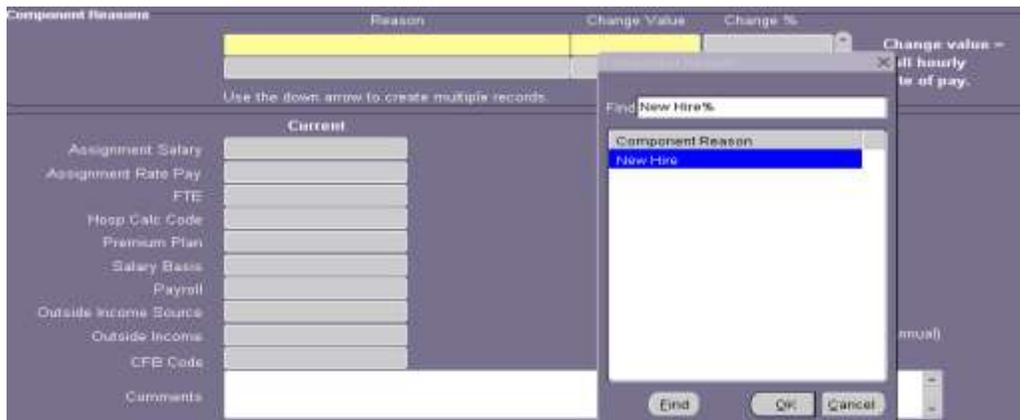
Return to Previous Form Save

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- A. **SALARY BASIS** field is a required field, using the LOV select the appropriate **Salary Basis** Type; click **OK**.



2. In the Component Reasons section, click in the **REASON** Field, both the **REASON** and **CHANGE VALUE** field now become yellow required fields. Using the LOV in the Reason field select **New Hire**, click **OK**.



3. Click in the **CHANGE VALUE** field; enter either the **hourly rate** (for a bi-weekly paid employee) or the **monthly rate** (for a salaried employee). When you enter this information, the **PROPOSED ASSIGNMENT SALARY** and the **ASSIGNMENT RATE OF PAY** fields will automatically be entered.
4. Enter the **full-time equivalency** for the employee in the **FTE** field. This number should be between 0.01 and 1.0. Even though this is not a required field, it is **strongly recommended** that you enter this information for Records. For explanation of FTE values [click here](#).
5. If the employee is receiving funds from either the **VA** or **Eye Foundation**, use the LOV in the **OUTSIDE INCOME SOURCE** field; select the appropriate, if applicable. Click **OK**.

Note: There are only two outside income sources -- VA and Eye Foundation.

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6. Enter the **amount of income provided by this source** in the **OUTSIDE INCOME** field, if applicable. **This should be an annual amount.**
7. Enter **comments**, if applicable, in the **COMMENTS** field at the bottom of this form. Comments entered here will appear on the **ACT MAIN FORM**.

Component Reasons			
Reason	Change Value	Change %	
New Hire	15.00		Change value = Full hourly rate of pay.
Use the down arrow to create multiple records.			
	Current		Proposed
Projected Assignment Salary			31,200.00
Actual Assignment Rate of Pay			15.00
FTE			1.00
Hosp Calc Code			
Premium Plan			NA
Salary Basis			HOURLY
Payroll			Biweekly
Outside Income Source			
Outside Income			
CFB Code			GROUP C
Comments			
<input type="button" value="Return to Previous Form"/> <input type="button" value="Save"/>			

8. Click the **SAVE** button; then click **RETURN TO PREVIOUS FORM** button. This returns you to the **ACT MAIN FORM**.
9. Click the **LABOR SOURCE** button at the bottom of the **ACT MAIN FORM**.

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The **LABOR SOURCES** indicate what account strings the employee's salary and associated fringe benefits will be charged to. Because the GL and GA account structures are different, there are differences in entering the account string data.

Entering Labor Sources Form Information

Entering General Ledger (GL) Information

The screenshot shows the 'Costing' form. At the top, 'Projected Assignment Salary' is 31,200.00 and 'Element Name' is a dropdown menu. Below this are two tabs: 'Assignment' and 'Element'. The 'Assignment' tab is active, showing a table with columns: 'Current LD', 'Stop', 'Effective Date' (subdivided into 'From Date' and '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' and 'Stop' columns. Below the table is a 'Comments:' field and a 'Total LD %' field showing '.00'. At the bottom are 'Return to Previous Form' and 'Save' buttons.

1. Click on the **GL CODE** LOV. This opens the **UAB_AKF FIND** window.

The screenshot shows the 'UAB_AKF FIND' window. It has a title bar with a red icon and the text 'UAB_AKF'. Below the title bar is an 'ALIAS' field with a dropdown arrow. Below the field is a horizontal scrollbar. At the bottom are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

2. Enter the **ten-digit GL Account number** in the **ALIAS** field; click **OK**. This opens the window below. All but the **OBJECT** field has been auto populated.

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UAB_AKF

ACCOUNT **2100213** PERIODONTOLOGY
 SUBACCOUNT **000** DEFAULT SUBACCOUNT
 BALANCING **123200000** SCH DEN GEN OPER FD
 ORGANIZATION **329800000** PERIODONTOLOGY
 FUTURE **0000** DEFAULT
 OBJECT ...

Buttons: 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** form.
4. Type in the **percent of the employee's funding** to be paid from the GL account string entered. **Only one funding source is allowed for each record/row.**

Note: an employee can have multiple funding sources; each funding source will need to be entered individually. Use the down arrow key to move the cursor to the next available row.

5. Repeat the above steps to enter all GL account funding sources. The **TOTAL LD %** field has to total **100%** before you can save the document.

Projected Assignment Salary **31,200.00** Element Name

Costing

Assignment Element

Current	Effective Date								
LD	Stop	From Date	To Date	GL Code	Project	Task	Award	Exp Ot	%
<input type="checkbox"/>	<input type="checkbox"/>	01-OCT-2009		2100213.000.123200000.329800000					100.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments:

Total LD % 100.00

Buttons: Return to Previous Form, Save

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

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Entering Grant (GA) Funding Sources

1. Click one time in the **PROJECT** field of the next available row.

The screenshot shows the 'Costing' section of the ACT form. At the top, 'Assignment Salary' is 43,729.92 and 'Element Name' is blank. Below is a table with columns: Current, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. The first row has '12-SEP-2005' in the From Date field, '7110340.000.130000000.702500000' in the GL Code field, and '50.00' in the % field. The Project field is empty and highlighted by an arrow.

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.

7. Type in the **percent of the employee's effort** to be charged to the project number in the **%** field.
8. 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 with two rows in the table. The second row is highlighted in blue and contains: '12-SEP-2005' in From Date, '30-SEP-2005' in To Date, '7110340.000.130000000.702500000' in GL Code, '225820' in Project, '01.01' in Task, '1525820' in Award, and '10' in Exp Or. The % field for this row is '50.00'. At the bottom right, the 'Total LD %' field is circled in red and contains '100.00'.

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

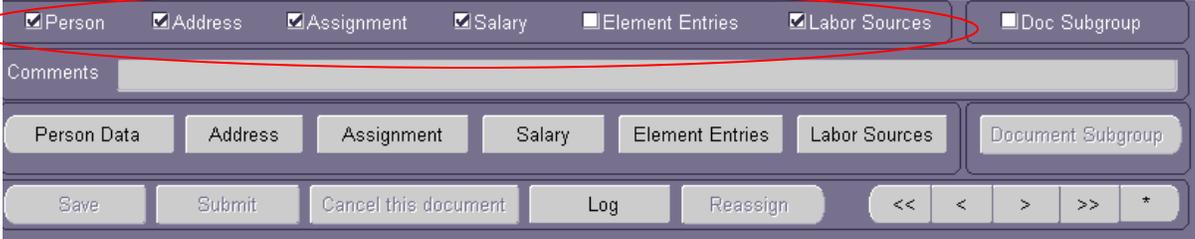
9. Click the **SAVE** button, then click on the **RETURN TO PREVIOUS FORM** button. This will return you to back to the **ACT MAIN FORM**.

Appoint, Change and Terminate (ACT) Documentation New Hire ACT Document

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**, checkmarks have been inserted in the checkbox next to **PERSON, ADDRESS, ASSIGNMENT, SALARY** and **LABOR SOURCES**.



The screenshot shows the ACT Main Form interface. At the top, there is a row of checkboxes: Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below this is a Comments field. Underneath are several tabs: Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. At the bottom, there are buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

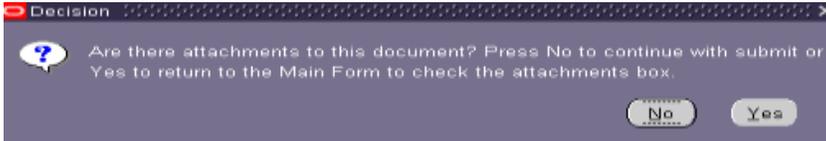
Note: A check will be inserted automatically when **REQUIRED FIELDS** on all screens and tabs have been completed. All check boxes must be checked (excluding Element Entries, except on Status 99 New Hire Document) before submitting the document.

2. On the **ACT MAIN FORM**, verify the Attachments check box has a checkmark; assemble all attachments to be submitted with New Hire document.



The screenshot shows the ACT Main Form with the following details: Document Reason: NEW HIRE, Effective Date: 01-OCT-2009, Requestor Name: HALEY, Document Number: 422912, Document Status: OPEN, Workflow Type: HIRE, and Submit Date: (empty). The Attachments checkbox is checked, and the Received checkbox is unchecked.

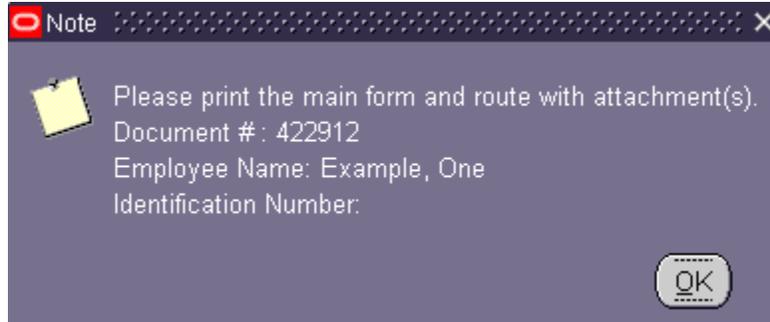
3. Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**
4. Click the **SUBMIT** button.
5. If the document was submitted without a checkmark in the **ATTACHMENTS** box on the **ACT MAIN FORM**, the following **DECISION** window displays.



The screenshot shows a Decision dialog box with the following text: "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." The dialog has "No" and "Yes" buttons.

Appoint, Change and Terminate (ACT) Documentation New Hire: Submitting a New Hire Document

- Click **YES** to return to the **ACT MAIN FORM**; click in the **ATTACHMENTS** checkbox and resubmit the document.
- The following Note displays.



- Click **OK**. Print the **ACT MAIN FORM**; attach a printed copy of the **ACT MAIN FORM** to attachments being sent Central HR.
- 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).*



Document Reason	NEW HIRE	Document Number	422912
Effective Date	01-OCT-2009	Document Status	READY
Requestor Name	HALEY	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	16-OCT-2009 14:15:49

****** 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 **NEW HIRE** 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. When the document has been approved by all levels of Administration, the **DOCUMENT STATUS** will change to **COMPLETE**.
- The requestor of the **NEW HIRE** document will receive email notification when an employee's **NEW HIRE** document has entered a **COMPLETE** status.

The employee can now create a Blazer ID. For information on setting up a **Blazer ID** go to BlazerID Central webpage. Copy and paste link into URL:
<https://idm.blazernet.uab.edu/bid/reg>

[RETURN TO TOP](#)