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

**Understanding the Data Inquiry Form**

**DATA INQUIRY** is an overview of the employee’s *Personal, Assignment, Salary* and *Labor Source* information as it appears in the Administrative Systems database.

Using the **DATA INQUIRY** button and a *historical effective date*, a Requestor can view an employees’ information on a specific date in history. The starting history effective dates are 21-SEP-2003 for biweekly paid employees and 01-OCT-2003 for monthly paid employees.

**HR Officer → HR Transactions → ACT → Find Window**

When you click on the **DATA INQUIRY** button from the **FIND WINDOW**, you will see a form similar to the one below. The **ACT MAIN FORM** is a brief overview of the employee’s **PERSON DATA INFORMATION** and **ASSIGNMENT DATA INFORMATION** as it appears in the Administrative Systems at a specific point in time. Note the document information at the top is empty and the buttons at the bottom are not available. This indicates that you are looking at employee information not a specific document.

The **DATA INQUIRY ACT MAIN FORM** contains six forms available for viewing: **PERSON DATA, ADDRESS, ASSIGNMENT, SALARY, ELEMENT ENTRIES AND LABOR SOURCE**. An overview of each form is given below, along with a brief description of the information displayed in each field.
Viewing the Person Data (Data Inquiry) Form

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

The PERSON DATA (DATA INQUIRY) FORM contains five tabbed areas of information: PERSONAL, EMPLOYMENT, DIRECTORY, LICENSE, and TERMINATION.

1. The PERSONAL DATA tab displays the employee’s:
   - LAST NAME
   - FIRST NAME
   - MIDDLE NAME
   - SUFFIX (example: MD, OD, DMD)
   - TITLE (example: Mr., Ms)
   - SOCIAL SECURITY NUMBER (not viewable)
   - ITIN (viewable when ITIN is issued)
   - TEMPORARY ID (viewable when Temporary ID is issued)
   - DATE OF BIRTH
   - GENDER
   - EMAIL ADDRESS
   - BLAZER ID (UAB Student Employees only)
2. The **EMPLOYMENT** tab displays the employee’s:

- **LATEST HIRE DATE**
- **SERVICE DATE**
- **ETHNIC ORIGIN**
- **I-9 INFORMATION**
- **VETERAN STATUS** (if applicable)
- **VISA** data (if applicable)

3. The **PHONEBOOK** tab displays:

- Whether or not an employee is listed in the UAB phonebooks (paper and electronic), their job title as it should appear in the phonebooks, and name if the employee elects to be listed differently.

   - **FACULTY AND STAFF LIST** refers to the UAB paper phonebook. **Yes** indicates the employee will be listed in the UAB paper phonebook. **No** indicates the employee should not be listed in the UAB paper phonebook.
   - **INDIVIDUAL ONLINE LIST** refers to the UAB Electronic Phonebook located on the UAB website. This field defaults to **Yes** and cannot be changed. All UAB employees will be listed in the Electronic Phonebook.
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- The **ONLINE JOB TITLE** field will display if a different title other than the employee’s official job title is to appear in the paper and electronic phonebooks. The **ONLINE JOB TITLE** field is entered via the employee’s **New Hire ACT Document** or changed via a **Data Change ACT Document**.
- The **ONLINE DISPLAY NAME** field is usually left blank if the employee goes by his or her name as shown in **ACT**. However, some employees may choose to be known as another name – middle name, initials, nickname, etc. The **ONLINE DISPLAY NAME** field can be entered via the employee’s **New Hire ACT Document** or changed via a **Data Change ACT Document**.

4. The **LICENSE** tab displays information about an employee’s license, certification or membership. Some UAB employees may be required to hold a license or some other type of certification for their job. If an employee has several, you can use the up and down arrows or the scroll bar to view the information.

5. The **TERMINATION** tab displays information on an employee’s termination if applicable.
6. The **SCHOOLS AND COLLEGES** tab displays information about the employee’s educational history:

- **SCHOOL OR COLLEGE** – displays the name of the school or college attended.
- **DEGREE NAME** – degree name and level earned; ranging from Not Specified and First Grade through Ph.D. and Doctorate.
- **DEGREE DATE** – actual date the degree was earned.
- **TYPE** – OD (Other Degree) HD (Highest Degree). There can only be one highest degree. All others will be OD.
- **TRANSCRIPT/OFFICIAL DOCUMENTATION ON FILE AND DEGREE DISCIPLINE** – displays for faculty appointments only.

If an employee has several schools and colleges listed, use the up and down arrows or the scroll bar to view the list.

7. Click on the **RETURN TO PREVIOUS FORM** button to return to the **ACT MAIN FORM** or click on the **ADDRESS** button to view employee’s home and campus address and phone information.
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Viewing the Address and Phones (Current Data Inquiry) Form

The ADDRESS AND PHONES (CURRENT DATA INQUIRY) FORM displays the employee’s:

- Home address
- Campus address
- If an employee has an International Address a checkmark will display in the INTERNATIONAL ADDRESS CHECKBOX.

- Home and campus phone numbers, as well as, any other phone numbers UAB may have on file for the employee – work fax, pager, cell phone and campus secondary.

Use the up and down arrows on your keyboard to scroll between the home, campus primary, and campus secondary. If several phone numbers are in the system, you can use the up and down arrows or the scroll bar to view them as well.

Clicking the RETURN TO PREVIOUS FORM button at the bottom of the ADDRESS AND PHONES (DATA INQUIRY) FORM will return you to PERSON DATA (DATA INQUIRY) FORM.

Click on the RETURN TO PREVIOUS FORM button at the bottom of the PERSON DATA (DATA INQUIRY) FORM to return to the ACT MAIN FORM.

Updated 24-Mar-2011
Viewing the Assignment (Data Inquiry) Form

The **Assignment (Data Inquiry) Form** displays information about the employee’s organization, position, job, grade and payroll group as well as other information pertaining to the employee’s assignment:

- **Effective Date From** – effective date of the assignment being viewed.
- **Effective Date To** – end date of assignment being viewed.
- **Primary** – Y displays if the assignment being viewed is the employee’s Primary assignment. N displays if the assignment being viewed is an additional assignment.
- **Shift Differential Code** – displays premium code if applicable; primarily for hospital employees.
- **Grandparented** -- displays Y if the employee is considered a Grandparented employee.
- **Effort Report Eligible** – displays Yes if employee is Effort Report eligible based upon assignment level funding; displays No if employee is not Effort Report eligible based upon assignment level funding.
- **Assignment Category** – an employee’s employment status for the assignment being viewed. For a detailed description of approved UAB Assignment Categories (Employment Status), [click here](#). (You and UAB handbook Section 2, 2.1)
- **Status** – displays employee’s current assignment status.

**Note:** if the employee is currently in a Leave status, the status field will display similar to the example below.

- **Expected Return Date** – displays only when an employee is in a Leave status. Reflects the date the employee is due to return from leave.
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**Understanding the Data Inquiry Form**

**• Organization** – displays the Organization the employee is affiliated with.

**| General Assignment Information |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Category</td>
<td>01 Regular FT</td>
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<tr>
<td>Status</td>
<td>Active Assignment</td>
</tr>
<tr>
<td>Expected Return Date</td>
<td></td>
</tr>
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<td>Organization</td>
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</tr>
<tr>
<td>Location</td>
<td>Bham Main Campus</td>
</tr>
<tr>
<td>Position</td>
<td>320000000.52201.031001</td>
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<tr>
<td>Job</td>
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<tr>
<td>Grade</td>
<td>W.G14</td>
</tr>
<tr>
<td>Payroll Group</td>
<td>Staff 12</td>
</tr>
<tr>
<td>Timecard Dist Number</td>
<td></td>
</tr>
<tr>
<td>Timekeeping Method</td>
<td>Timekeeping Organization</td>
</tr>
</tbody>
</table>

**• Location** – displays the physical location of the Organization.

**• Position** – displays the position number the employee occupies within a specific organization. The first part of the number, up to the first period, is the organization number. The second part of the number is the position code assigned by Compensation for that particular position. The third number is a six-digit date. This is the date that the position was created or changed.

**• Job** – displays the job title assigned to the specified position code.

**• Grade** -- displays the grad assigned to the specified position code.

**• Payroll Group** – displays the employee's payroll group (Faculty 12, Staff 12, Faculty 9, etc.)

**• Timecard Dist. Number** – displays the timekeeping approver’s number if one has been assigned for the specified organization. If the organization in which the employee is affiliated does not have timekeeping approvers, this field will be blank.

**• Timekeeping Method** – will display only when an employee is paid biweekly. (TEL – University Employees, TAMS – Hospital Employees, Design Build – Design Build Services Employees)

**• Timekeeping Organization** -- will be blank unless the Timekeeping Organization is different from the Organization shown in the Organization field.

**Viewing the Salary (Data Inquiry) Form**

The **Salary (Data Inquiry) Form** displays the employee’s salary information as it appears in the Administrative Systems. If the salary does not appear to be correct, check to make sure the correct assignment was selected.

Updated 24-Mar-2011
The **SALARY (DATA INQUIRY) FORM** displays the employee’s:

- **PROJECTED SALARY** – current projected annual salary.
- **RATE OF PAY** – monthly or hourly rate of pay based upon salary basis.
- **FTE** – Full Time Equivalency, based upon number of worked hours per week.
- **CFB CODE** – a Composite Fringe Benefit Code will display according to the employees Assignment Category. For information pertaining to CFB Code [click here](#).
- **HOSP CALC CODE** – displays the code used to specify the shift and pay for hospital employees.
- **PREMIUM PLAN** – displays **H2** for Hospital Employees with a 017 Assignment Category. Displays H1 for Hospital Employees working in the Supplement Staffing Pool with a 04 Assignment Category. This field will be blank for University Employees.
- **SALARY BASIS** – Salary or Hourly
- **OUTSIDE INCOME SOURCE** – will be blank unless an employee receives income from either the Eye Foundation or the Veterans Administration.

Click **RETURN TO PREVIOUS FORM** to return to the **ACT MAIN FORM**.
Viewing the Labor Sources (Data Inquiry) Form

The **Labor Sources (Data Inquiry) Form** displays the employee’s funding source information – the account(s) from which the employee is paid. An example would be an employee who is funded from several different grants.

- **Projected Assignment Salary** – displays the employee’s current projected annual assignment salary.
- **From Date** – beginning of the current pay period.
- **To Date** – the ending date for a Funding Source or four a grant. It can also be the end of a pay period.

- **GL Account** – the General Ledger account(s) information in which the employee’s salary will be paid from. For information pertaining to the General Ledger Accounting Structure, [click here](#).

- **Project, Task, Award, Organization (PTAO)** – the Grant Account, Task, Award and Organization in which the employee’s salary will be paid from. For information pertaining to the Grants Accounting Structure, [click here](#).

- **% (Percent)** – displays the percentage rate a GL Account or a PTAO string is charged for an employee’s salary. Each employee’s funding source percentage must equal 100%.

Click the **Return to Previous Form** button to return to the **ACT Main Form**.
Viewing the Element Entry (Data Inquiry)

The **ELEMENT ENTRY (DATA INQUIRY) FORM** is used to display lump sum payments made to employees in addition to their regular base pay. Examples are faculty summer pay, payment for credit course instruction, bonus or incentive payments, FIPS, retention pay, referral pay, relocation reimbursements.

- **COSTED** – a checkmark appears when the labor source for a specific **ELEMENT NAME** has been changed. It is a visual indicator to the approver that changes have been made to the labor sources information.
- **ELEMENT NAME** – identifies the type or reason for additional payment.
- **EFFECTIVE START DATE** – usually the effective date of document submitted requesting additional payment, or the beginning date of the pay period in which the additional payment will be paid.
- **EFFECTIVE END DATE** -- the end date of the pay period in which the additional payment will be paid.

Clicking the **ENTRY VALUES** button will display the **ENTRY VALUES (SPECIAL COMPENSATION)** window. Displaying the $ amount paid or hours worked depending on the element name selected.

Close the **ENTRY VALUES (SPECIAL COMPENSATION)** window by clicking on the (X) located in the upper right hand corner of the window.

Click the **RETURN TO PREVIOUS FORM** button located at the bottom of the **ELEMENT ENTRY (DATA INQUIRY)** form.

From the **ACT MAIN FORM** you can return to the Find Window by clicking on the flashlight located in the tool bar. Or click on the (X) in the upper right hand corner of the ACT Main Form to return to your Personal Home Page.

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