

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 clicking on the section listed below or scrolling through the document.

[Creating a New Hire ACT Document](#)

Entering Person Data Information

[Entering Personal Information](#)

[Entering Employment Information](#)

[Entering Schools and Colleges Information](#)

[Entering Phonebook Information](#)

[Entering License, Certification, Membership Information](#)

[Entering Address and Phone Information](#)

Entering Assignment Form Information

Entering Salary Form Information

Entering Labor Sources Form Information

[Entering General Ledger \(GL\) Information](#)

[Entering Grant \(GA\) Funding Sources](#)

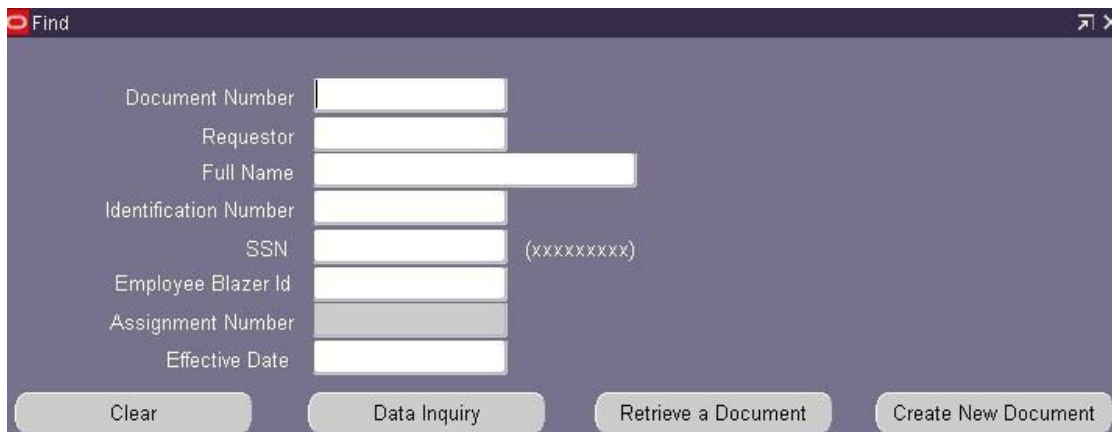
Submitting A Complete New Hire Document

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

UAB HR Officer → HR Transactions → ACT → Find Window

Creating a New Hire ACT Document

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

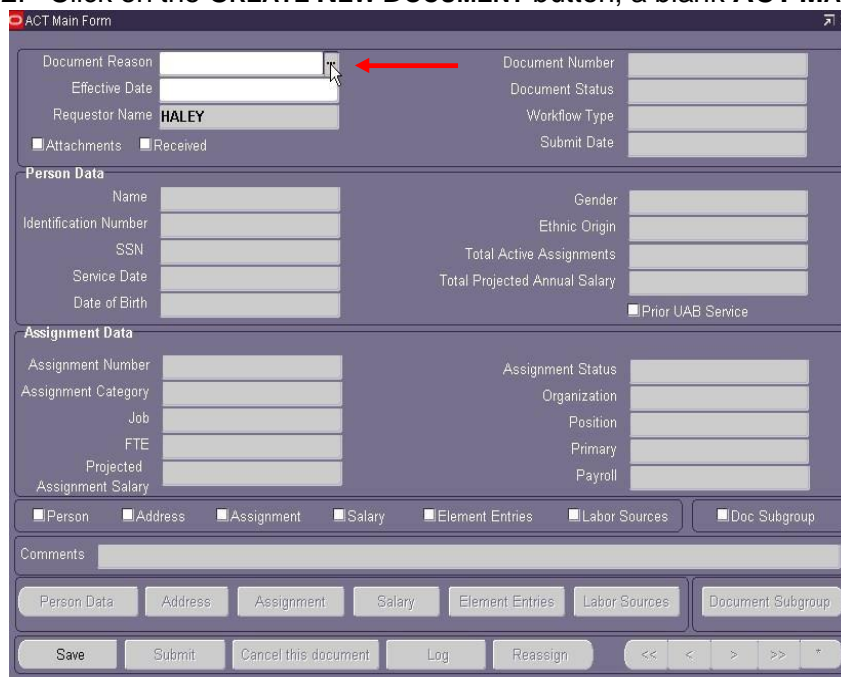


The screenshot shows the 'Find' window with the following fields and buttons:

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 fields and buttons:

Document Reason <input type="text"/>	Document Number <input type="text"/>
Effective Date <input type="text"/>	Document Status <input type="text"/>
Requestor Name HALEY	Workflow Type <input type="text"/>
<input type="checkbox"/> Attachments <input type="checkbox"/> Received	Submit Date <input type="text"/>

Person Data

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

Assignment Data

Assignment Number <input type="text"/>	Assignment Status <input type="text"/>
Assignment Category <input type="text"/>	Organization <input type="text"/>
Job <input type="text"/>	Position <input type="text"/>
FTE <input type="text"/>	Primary <input type="text"/>
Projected Assignment Salary <input type="text"/>	Payroll <input type="text"/>

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments

Person Data | Address | Assignment | Salary | Element Entries | Labor Sources | Document Subgroup

Save | Submit | Cancel this document | Log | Reassign | << < > >>

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

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- 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

- 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

August 2014

S	M	T	W	T	F	S
27	28	29	30	31	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

25-AUG-2014

OK Cancel

- 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](#).

Document Reason: NEW HIRE

Effective Date: 01-AUG-2014

Requestor Name: ALHOWARD

Attachments Received

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

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 with a form. The form has two columns of input fields. The left column contains: 'Document Reason' with the value 'NEW HIRE', 'Effective Date' with the value '01-AUG-2014', 'Requestor Name' with the value 'ALHOWARD', and two checkboxes labeled 'Attachments' (checked) and 'Received' (unchecked). The right column contains: 'Document Number' with the value '827183', 'Document Status' with the value 'OPEN', 'Workflow Type' with the value 'HIRE', and 'Submit Date' which is an empty field. The window has a standard title bar with a close button in the top right corner.

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.

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.

Appoint, Change and Terminate (ACT) Documentation

New Hire: Submitting a New Hire Document

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, the 'Document Reason' is 'NEW HIRE', 'Effective Date' is '01.AUG-2014', and 'Requestor Name' is 'ALHOWARD'. The 'Document Number' is '827183', 'Document Status' is 'OPEN', and 'Workflow Type' is 'HIRE'. Below this, there are sections for 'Person Data' and 'Assignment Data'. The 'Person Data' section includes fields for Name, Identification Number, SSN, Service Date, Date of Birth, Gender, Ethnic Origin, Total Active Assignments, Total Projected Annual Salary, and a checkbox for 'Prior UAB Service'. The 'Assignment Data' section includes 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 Data' tab is highlighted in yellow, and an arrow points to it. Below the tabs are buttons for 'Save', 'Submit', 'Cancel this document', 'Log', 'Reassign', and navigation arrows.

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

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
Identification Number Document Number
Assignment Number Document Status
Effective Date

Latest Hire Date Service Date
Person Type Email Address

Personal Employment Phonebook License Termination Schools and Colleges

Current Proposed

SSN

Last Name

First Name

Middle Names

Suffix

Title

Date Of Birth

Gender

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](#).

[here](#).

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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.
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	SSN
Last Name		Example	
First Name		One	
Middle Names			
Suffix			
Title		Mr.	
Date Of Birth		15-APR-1978	...
Gender		MALE	▼

Comments

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

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New Hire: Submitting a New Hire Document

Entering Employment Information

The screenshot shows the 'Employment' tab in the ACT system. It features two columns: 'Current' and 'Proposed'. The 'Current' column has empty input fields for 'Ethnic Origin', 'Veteran Status 100', 'Veteran Status 100A', 'I-9 Status', 'Visa Type', and 'Work Visa Expiration Date'. The 'Proposed' column has a dropdown menu for 'Ethnic Origin', a dropdown menu for 'Veteran Status 100' with 'Not a Veteran' selected, and empty input fields for 'Veteran Status 100A', 'I-9 Status', 'Visa Type', and 'Work Visa Expiration Date'. A 'More info on Veteran Status' button is located to the right of the 'Proposed' Veteran Status 100A field. At the bottom, there is a 'Comments' text area and three buttons: 'Address', 'Return to Previous Form', and 'Save'.

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 'Find%' search bar at the top. Below it is a list of options: 'American Indian or Alaskan Native' (highlighted in blue), 'Asian', 'Black or African American', 'Hispanic or Latino, regardless of race', 'Native Hawaiian or Other Pacific Islander', 'Two or More Races', and 'White'. 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 'Find%' search bar at the top. Below it is a list of options: 'Armed Forces Service Medal (AFSM) Veteran' (highlighted in blue), 'Disabled Vet, Other Protected, AFSM, Recently Separated', 'Disabled Veteran', 'Disabled, AFSM Veteran', 'Disabled, Other Protected Veteran', 'Disabled, Other Protected, AFSM Veteran', 'Disabled, Recently Separated Veteran', 'Disabled, Recently Separated, AFSM Veteran', 'Not a Veteran', 'Other Protected Veteran', 'Other Protected Veteran, AFSM, Recently Separated', 'Other Protected, AFSM Veteran', and 'Other Protected, Recently Separated Veteran'. 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.

[Click here.](#)

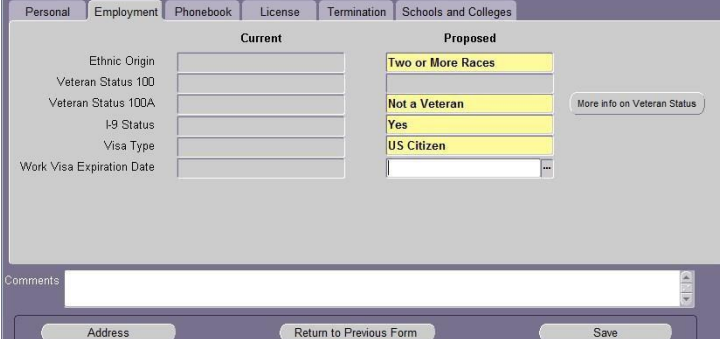
NOTE: There are only three options listed here -- Yes, No, and Not Required - Trainee. You can submit the document with a No answer, but it will not be processed and completed until the I-9 has been received in Records Administration.



The screenshot shows a window titled "I-9 Status" with a search field at the top. Below the search field is a list of options: "No", "Not Required - Trainee", and "Yes". The "No" option is currently selected and highlighted in blue. At the bottom of the window are buttons for "Find", "OK", and "Cancel".

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**.



The screenshot shows a portion of the ACT form with tabs for Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The "Current" and "Proposed" sections are visible. The "Proposed" section has a dropdown menu for "Visa Type" with options: "Two or More Races", "Not a Veteran", "Yes", and "US Citizen". A "More info on Veteran Status" button is also present. At the bottom are buttons for "Address", "Return to Previous Form", and "Save".

- b. If the employee is **not a US citizen**, but is instead a **permanent resident or an international employee** with a different type of work authorization (commonly referred to as a "visa"), [click here](#).

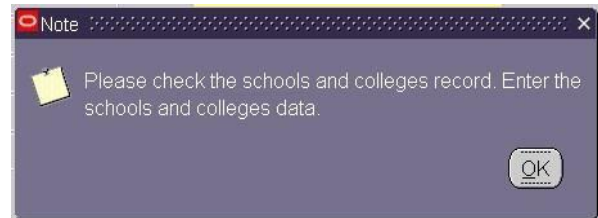
5. When required, enter future **Work Visa Expiration Date**. Date can be typed directly into the field using the dd/mmm/yyyy and must be a **future** date.



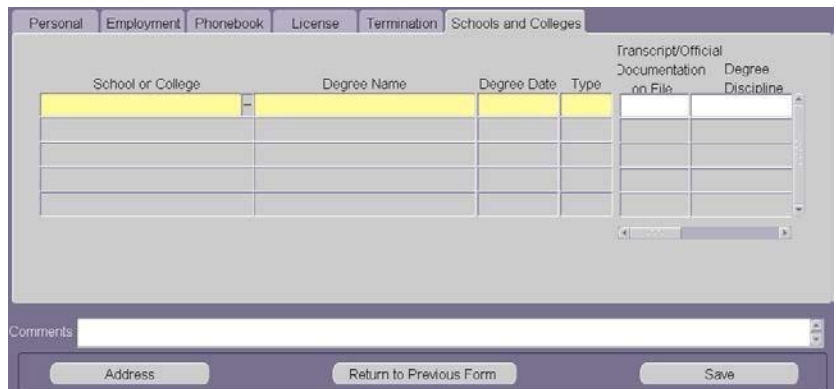
The screenshot shows a window titled "Visa Type" with a search field at the top. Below the search field is a list of visa types: "B-1 Visitor for Business", "B-2 Visitor for Pleasure", "EAC Employment Authorization", "F-1 Student", "H-1 Work Visa", "J-1 Work Visa - Can Be A Student", "O-1 Outstanding Specialty", "PR Permanent Resident", "TN Canadian Employee", "US Citizen", "WVB Visa Waiver Business", "WWT Visa Waiver Tourist", "WB1 Canadian Walkover for Business", "WB2 Canadian Walkover for Pleasure", and "XX Asylum Status". The "B-1 Visitor for Business" option is currently selected and highlighted in blue. At the bottom of the window are buttons for "Find", "OK", and "Cancel".

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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 system. 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 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

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Entering Schools and Colleges Information

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

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: United States of America

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		

Comments: _____

Address Return to Previous Form Save

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: United States of America

Country

Find %Panama%

- Location
- Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh

Find OK Cancel

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

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

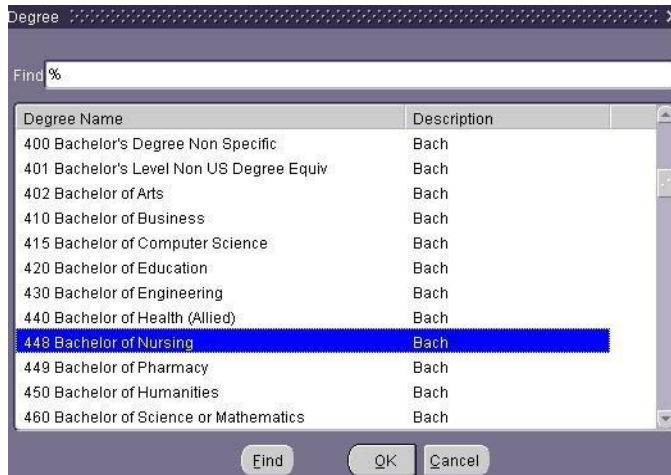
The screenshot shows the 'Person Data (Create New Document)' application. The 'Schools and Colleges' tab is selected. The 'Country' field is set to 'Panama'. A dropdown menu is open for the 'School or College' field, showing a list of institutions in Panama. The 'Autonomous University of Chiriqui' is selected. The table below shows the columns for the 'Schools and Colleges' section.

School or College	Degree Name	Degree Date	Type	Transcript/Official Documentation on File	Degree Discipline
Autonomous University of Chiriqui					
Christian University of Panama					
Columbus University					
Delphi University					
Florida State University - Panama					
ISAE University					
Institution Not Available in List					
Interamerican Distance Education University of Pan...					
Interamerican University of Panam					
International Maritime University of Panama					
International University					
International University of Business and Education					
Latin American University of International Business					

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

The screenshot shows the "Schools and Colleges" tab of the ACT documentation form. A table is visible with columns: "School or College", "Degree Name", "Degree Date", "Type", "Transcript/Official Documentation on File", and "Degree Discipline". The first row contains "University of Alabama at Birmingham", "448 Bachelor of Nursing", and a dropdown menu. A callout box is overlaid on the table with the following text:

Accurate information about degree level and field is crucial to clean data reporting, especially for international hires in IT roles. Please email iss@uab.edu if you need assistance correctly identifying a degree field for an international hire.

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.

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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.

The screenshot shows the 'Schools and Colleges' tab in the ACT system. A table is displayed with the following data:

School or College	Degree Name	Degree Date	Type	Official Degree Discipline
University of Alabama at Birmingham	448 Bachelor of Nursing	25-MAY-2008	HD	51.16 - Nursing.

A callout box contains the following text:

Accurate information about degree level and field is crucial to clean data reporting, especially for international hires in IT roles. Please email iss@uab.edu if you need assistance correctly identifying a degree field for an international hire.

7. Click on Save.

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

Entering Phonebook Information

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

Data used for the UAB Electronic Directory

	Current	Proposed
Individual Online List	<input type="text"/>	Yes
Online Job Title	<input type="text"/>	<input type="text"/>
Online Display Name	<input type="text"/>	<input type="text"/>
Faculty and Staff List	<input type="text"/>	<input type="text"/>

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

Comments

Address Return to Previous Form 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 web form with tabs for Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The 'License' tab is active. The form is titled 'License/Certificate/Membership Information' and is divided into two columns: 'Current' and 'Proposed'. Each column has fields for Type, Title, Number, and Expiration Date. The 'Proposed' 'Type' field has a dropdown arrow. Below the fields is a note: 'Use down arrow to create multiple records.' At the bottom, 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 dropdown menu is shown with the following options: Name, Certification, License (highlighted in blue), Membership, and Professional Competency Certification.

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

The 'License Title' dialog box has a search field with a '%' symbol. A list of license titles is displayed, with 'Architect' selected. The list includes: Architect, Cert. Nurse Anesthetist, Cert. Public Accountant, Dentist, Dietician, Engineer, Professional, Lawyer, Licensed Practical Nurse, Medical Doctor, LIC/CERT Unknown, Medical Doctor, Perm Foreign LJC, Medical Doctor, Perm US LIC/CERT, and Medical Doctor, Temp Foreign LJC. 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 columns for 'Current' and 'Proposed' information, with an 'End Date Current' checkbox. Fields include Address Type, Address Line1, Address Line2, Address Line3, City, State, and Zip Code. The 'Phones' section has columns for 'Delete', 'Current', 'Type', 'Phone Number (xxxxxxxx)', and 'Date From'. A 'Comments' field is at the bottom with an 'International Address' checkbox. A note at the bottom right of the address section says 'Use the down arrow to create multiple records.'

Note: All employees must have a local (US) address and/or campus address in order to receive correspondence. Employees 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' form with the 'Address Type' field's LOV (List of Values) open. The LOV lists 'Campus Primary', 'Campus Secondary', 'Campus Tertiary', 'Home', and 'Recruiting'. The 'Home' option is highlighted. A black arrow points from the 'Home' option in the LOV to the 'Address Type' field in the main form. The 'End Date Current' checkbox is checked. The 'Comments' field is empty. Buttons for 'End', 'OK', and 'Cancel' are at the bottom of the LOV window.

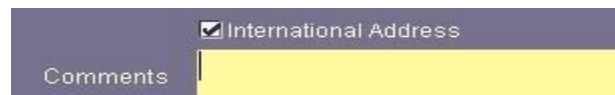
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2. Enter the **employee's street address** in the **ADDRESS LINE1** field. There are two more address lines available if needed.
3. In the **CITY** field, click on the **LOV**, the LOV brings up a **FIND** field. In the **FIND** field type **the name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

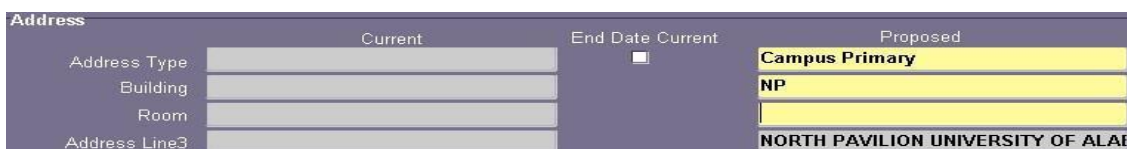


4. Highlight the **correct zip code range** for the city and county in which the employee lives. Click **OK**. This will populate the City and State field.
5. Click in the **ZIP CODE** field, type the **correct Zip Code**. Click **SAVE**.

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.



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

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 columns for Delete Current, Type, Phone Number (xxxxxxxxxx), and Date From. An arrow points to the 'Type' field. 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.

The screenshot shows the 'Phones' section of a form. The 'Type' field contains 'Home' and the 'Phone Number (xxxxxxxxxx)' field contains '(205) 555-7777'. The 'Date From' field contains '01-AUG-2014'.

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

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**.



Phones	Type	Phone Number (xxxxxxxx)	Date From
<input type="checkbox"/>	Home	(205) 555-7777	01-AUG-2014
<input type="checkbox"/>	Campus Primary	(205) 934-5555	01-AUG-2014
<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.

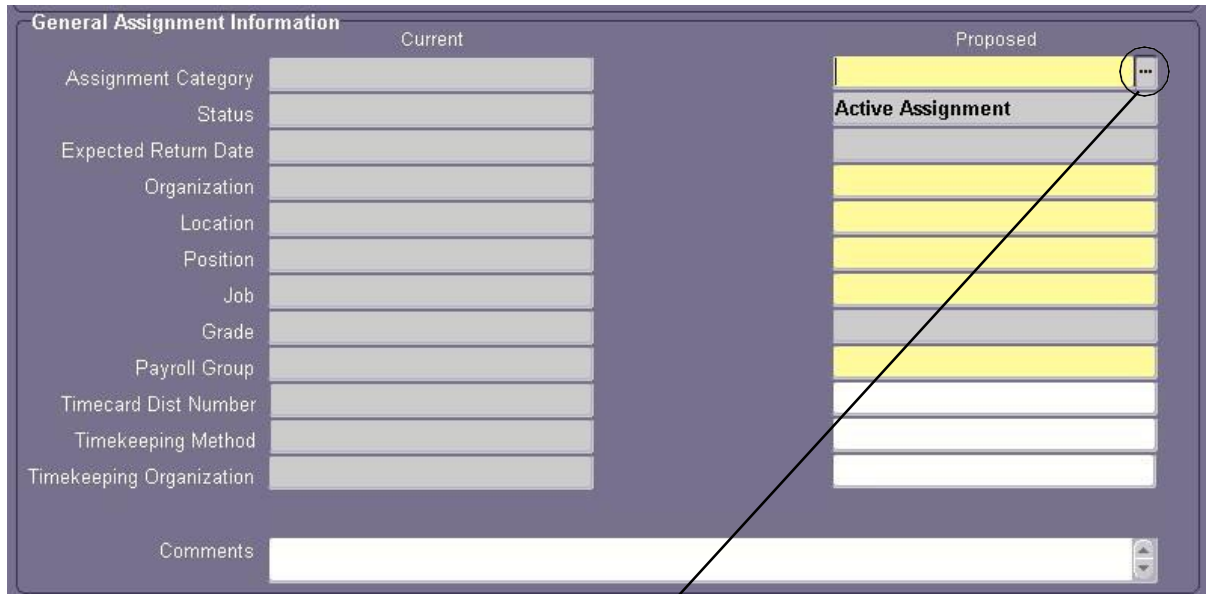
19. Click the **SAVE** button; then click return to **RETURN PREVIOUS FORM** button. This will take you back to the **PERSON DATA FORM**.
20. Click **RETURN TO PREVIOUS FORM** button at the bottom of the **PERSON DATA FORM** to return to the **ACT MAIN FORM**.
21. Click the **ASSIGNMENT** button at the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

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.

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

Entering Assignment Form Information

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



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**.



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.

3. 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.

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

General Assignment Information		Current	Proposed
Assignment Category			04 Irregular
Status			Active Assignment
Expected Return Date			
Organization			340000000 School of Nursing Dear
Location			Bham Main Campus
Position			340000000.00206.110615
Job			FF217E3.Financial Officer III
Grade			W.G18
Payroll Group			Staff 12
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Supervisor Name			
Supervisor Assignment #			
Comments			

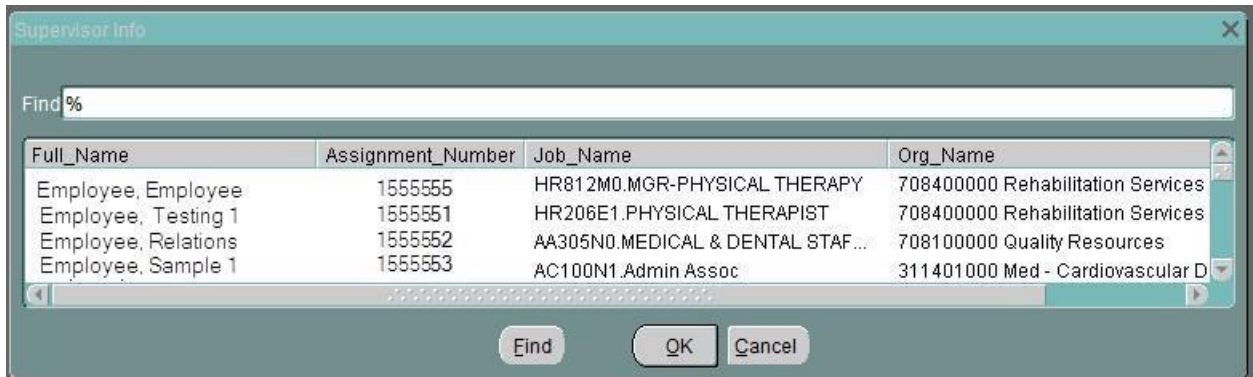
4. Click in the **POSITION** field, select the ***position code*** from the position LOV. This LOV will contain only the position codes affiliated with the organization you have chosen. It will display all of the positions available for the organization - both vacant and filled. By entering the correct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

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

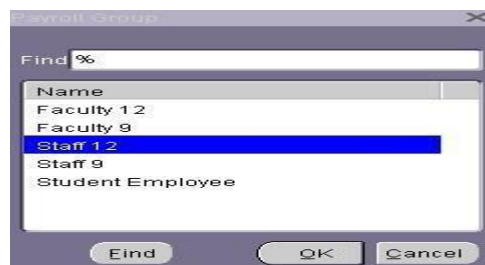
General Assignment Information		Current	Proposed
Assignment Category			
Status			Active Assignment
Expected Return Date			
Organization			
Location			
Position			
Job			
Grade			
Payroll Group			
Timecard Dist Number			
Timekeeping Method			
Timekeeping Organization			
Supervisor Name			
Supervisor Assignment #			

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.

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



6. 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.

7. 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.
8. If this is a monthly assignment, leave the above three fields blank.

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

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

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
Payroll Group	Staff 12
Timecard Dist Number	
Timekeeping Method	TEL
Timekeeping Organization	
Comments	

Return to Previous Form Save

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

11. Click on the **SALARY** button at the bottom of the **ACT MAIN FORM**.

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

Appoint, Change and Terminate (ACT) Documentation

New Hire: Submitting a New Hire Document

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 %

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		

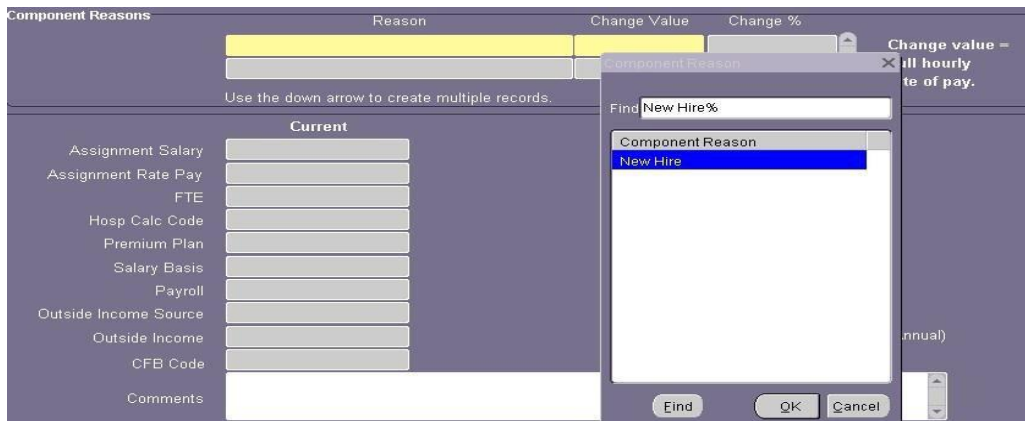
Return to Previous Form Save

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

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



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**.

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

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

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	

Use the down arrow to create multiple records.

Change value = Full hourly rate of pay.

	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		(Annual)
CFB Code		GROUP C
Comments		

Return to Previous Form 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**.

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.

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

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 is a table with columns: Current LD, Stop, Effective Date (From Date, To Date), GL Code, Project, Task, Award, Exp Or, and %. There are five rows in the table, all with empty cells. At the bottom right of the table area, 'Total LD %' is .00. Below the table is a 'Comments:' field. At the bottom of the form are two buttons: 'Return to Previous Form' and 'Save'.

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 close button. Below the title bar is an 'ALIAS' field with a dropdown arrow. Below the field is a horizontal scrollbar. At the bottom of the window 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.

The screenshot shows the 'UAB_AKF FIND' window after a selection. The fields are populated as follows: ACCOUNT 2101564 UNIVERSITY REGISTRAR, SUBACCOUNT 000 DEFAULT SUBACCOUNT, BALANCING 122000000 PROV ADMIN GEN OPER FDS, ORGANIZATION 213005000 UNIVERSITY REGISTRAR, FUTURE 0000 DEFAULT, and OBJECT is empty. At the bottom of the window are five buttons: 'OK', 'Cancel', 'Combinations', 'Clear', and 'Help'.

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

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.

The screenshot shows a software interface for entering cost data. At the top, 'Projected Assignment Salary' is 61,200.00 and 'Element Name' is a dropdown menu. Below this is a 'Costing' section with 'Assignment' and 'Element' tabs. A table with columns for 'Current LD', 'Stop', 'Effective Date (From/To)', 'GL Code', 'Project', 'Task', 'Award', 'Exp Or', and '%' is shown. The first row has '01-AUG-2014' for the effective date, a long GL code, and '100.00' in the percentage column. Below the table, a 'Total LD %' field is highlighted in yellow and contains '100.00', with a red arrow pointing to it. At the bottom are 'Return to Previous Form' and 'Save' buttons.

Current LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
<input type="checkbox"/>	<input type="checkbox"/>	01-AUG-2014	2101564.000.122000000.213005000					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"/>							

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

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

Entering Grant (GA) Funding Sources

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

Projected Assignment Salary: 61,200.00 Element Name: [dropdown]

Costing

Assignment Element

Current	LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
			From Date	To Date					
<input type="checkbox"/>	<input type="checkbox"/>		01-AUG-2014		2101564.000.122000000.213005000				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"/>								

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**.

Costing

Assignment Element

Current	LD	Stop	Effective Date	GL Code	Project	Task	Award	Exp Or	%
			From Date	To Date					
<input type="checkbox"/>	<input type="checkbox"/>		01-AUG-2014		2101564.000.122000000.213005000				50.00
<input type="checkbox"/>	<input type="checkbox"/>		01-AUG-2014	31-DEC-2016	226294	01.01	1526294	10	50.00
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

Comments: _____ Total LD % 100.00

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

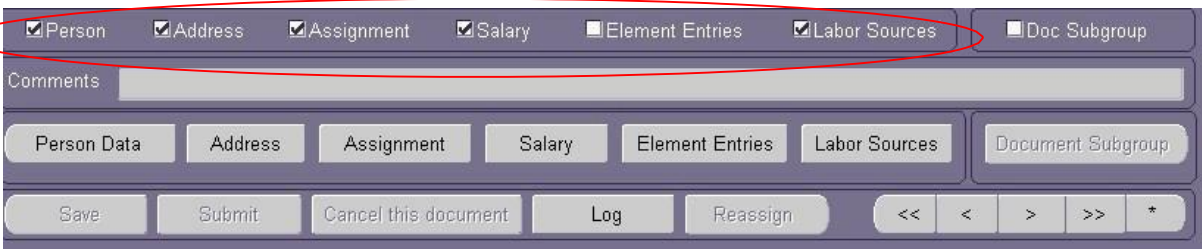
Note: TOTAL LD% must equal 100% before you can save the document.

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**.

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. A red oval highlights the first five checkboxes. Below this row is a 'Comments' text area. Underneath are several buttons: 'Person Data', 'Address', 'Assignment', 'Salary', 'Element Entries', 'Labor Sources', and 'Document Subgroup'. At the bottom, there is a row of buttons: '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.

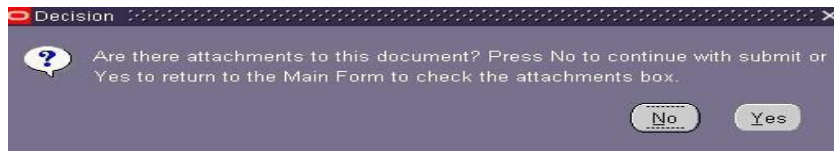


The screenshot shows a window titled 'ACT MAIN FORM' with a header bar. Below the header, there are several fields for document information: Document Reason (NEW HIRE), Effective Date (01-AUG-2014), Requestor Name (ALHOWARD), Document Number (827183), Document Status (OPEN), Workflow Type (HIRE), and Submit Date. At the bottom left, there are two checkboxes: Attachments and Received.

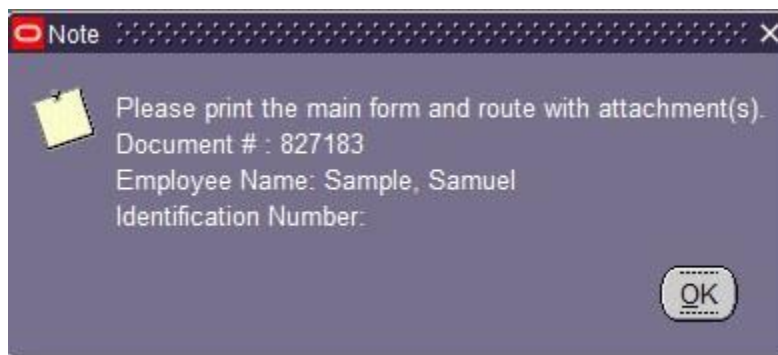
3. Before submitting the document make certain all information is correct. **Changes to the document can not be made once the document has been submitted.**
4. Click the **SUBMIT** button.

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

5. If the document was submitted without a checkmark in the **ATTACHMENTS** box on the **ACT MAIN FORM**, the following **DECISION** window displays.



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



8. Click **OK**. Print the **ACT MAIN FORM**; attach a printed copy of the **ACT MAIN FORM** to attachments being sent Central HR.
9. The **DOCUMENT STATUS** changes to **READY**.

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



Document Reason	NEW HIRE	Document Number	827183
Effective Date	01-AUG-2014	Document Status	READY
Requestor Name	ALHOWARD	Workflow Type	HIRE
<input checked="" type="checkbox"/> Attachments	<input type="checkbox"/> Received	Submit Date	25-AUG-2014 13:56:14

****** 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.**

10. 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**.

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

11. 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. [Click here.](#)

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