

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.

The screenshot displays the 'ACT Main Form' interface. It is divided into several sections:

- Document Information:** Fields for Document Reason, Effective Date, Requestor Name, Document Number, Document Status, Workflow Type, and Submit Date. There are checkboxes for Attachments and Received.
- Person Data:** Fields for Name (Test, Gladtoeba J), Gender (Female), Identification Number (1012732), Ethnic Origin (White), SSN, Total Active Assignments (1), Service Date (29-NOV-2002), Total Projected Annual Salary (xx,xxx.xx), and Date of Birth (01-JUL-1971). There is a checkbox for Prior UAB Service.
- Assignment Data:** Fields for Assignment Number (1012732), Assignment Status (Active Assignment), Assignment Category (01 Regular FT), Organization (350000000 SHP Dean's Office), Job (AC100N1.Admin Assoc), Position (350000000.00901.031001), FTE (1), Primary (Y), Projected Assignment Salary (xx,xxx.xx), and Payroll (Biweekly). There is a checkbox for Prior UAB Service.
- Navigation and Controls:** A row of checkboxes for Person, Address, Assignment, Salary, Element Entries, Labor Sources, and Doc Subgroup. Below this is a Comments field. At the bottom, there are buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup. The very bottom has buttons for Save, Submit, Cancel this document, Log, Reassign, and navigation arrows.

Two black arrows point from the text above to the 'Person Data' and 'Assignment Data' sections of the form.

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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**.

The screenshot shows the 'Person Data (Data Inquiry)' form. At the top, there are input fields for 'Full Name' (Test, Gladtoeba J), 'Identification Number' (1012732), and 'Assignment Number' (1012732). Below these are 'Latest Hire Date' (29-NOV-2002) and 'Service Date' (29-NOV-2002), and 'Person Type' (Employee). A red oval highlights the tabbed navigation area with the following tabs: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The 'Personal' tab is active, displaying a grid of fields: Last Name (Test), First Name (Gladtoeba), Middle Name (J), Suffix, Title (Ms.), Date of Birth (01-JUL-1971), SSN, ITIN, Temporary ID, Gender (Female), Email Address (workflow@uab.edu), and Blazer ID. At the bottom, there are buttons for 'Address' and 'Return to Previous Form'.

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)

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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)

The screenshot shows the 'EMPLOYMENT' tab selected. The form contains the following fields:

- Ethnic Origin:** White
- I-9 Status:** Yes
- Veteran Status:** (empty)
- Visa Type:** (empty)
- Work Visa Expiration Date:** (empty)

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

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.

The screenshot shows the 'PHONEBOOK' tab selected. The form displays a table with the following columns:

- Faculty and Staff List:** Yes
- Individual Online List:** Yes
- Online Job Title:** (empty)
- Online Display Name:** (empty)

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

- The **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.
- The **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.

Type	Title	Number	Expiration Date
License	REGISTERED NURSE	1-123456	12-DEC-2012

5. The **TERMINATION** tab displays information on an employee's termination if applicable.

Actual Date Recommendation Reason
 Projected Last Day at Work Leaving Reason
 Rehire Recommendation

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6. The **SCHOOLS AND COLLEGES** tab displays information about the employee's educational history:

The screenshot shows a web interface with a tabbed menu at the top: Personal, Employment, Phonebook, License, Termination, and Schools and Colleges. The 'Schools and Colleges' tab is active, displaying a table with the following columns: School or College, Degree Name, Degree Date, Type, Transcript/Official Degree Documentation on File, and Discipline. The first row is highlighted in blue and contains the text: 'High School/GED or Grade School', '101 High School Graduate', '01-JAN-198', and 'HD'. Below the table is a scroll bar with the text 'Use scroll bar to view discipline information'. At the bottom of the form are two buttons: 'Address' and 'Return to Previous Form'.

School or College	Degree Name	Degree Date	Type	Transcript/Official Degree Documentation on File	Discipline
High School/GED or Grade School	101 High School Graduate	01-JAN-198	HD		

- **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.

Address and Phones (Current Data Inquiry)

Full Name: **Test, Gladtoeba J** Identification Number: **1012732** Assignment Number: **1012732**

ADDRESS

Address Type: **Home**
 Primary Flag: **Y**
 Address Line1: **2500 Hawksbury Lane**
 Address Line2:
 Address Line3:
 City: **Hoover**
 State: **AL**
 Zip Code: **35226**

International Address
 Use the down arrow to view multiple records.

PHONES

Phone Type	Phone Number	Date From
Campus Primary	(205) 975-8034	23-DEC-2009
Home	(205) 823-6647	23-DEC-2009
Work Fax	(205) 975-8121	23-DEC-2009

Use the down arrow to view multiple records.

Return to Previous Form

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.

ADDRESS

Address Type: **Campus Primary**
 Primary Flag: **N**
 Building: **SHPB**
 Room: **230C**
 Address Line3: **SCHOOL OF HEALTH PROFESSIONS BUILDING OF UAB**
 City: **Birmingham**
 State: **AL**
 Zip Code: **35294-1212**

International Address
 Use the down arrow to view multiple records.

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**.

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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	25-AUG-2008	Shift Differential Code	NA
Effective Date To	31-DEC-4712	Grandparented	
Primary	Y	Effort Report Eligible	

General Assignment Information			
Assignment Category	01 Regular FT	Job	AC100N1.Admin Assoc
Status	Active Assignment	Grade	W.G13
Expected Return Date		Payroll Group	Staff 12
Organization	350000000 SHP Dean's Office	Timecard Dist Number	
Location	Bham Main Campus	Timekeeping Method	TEL
Position	350000000.00901.031001	Timekeeping Organization	
Category			

- **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 employees 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).

General Assignment Information	
Assignment Category	01 Regular FT
Status	Active Assignment
Expected Return Date	

- **EXPECTED RETURN DATE** – displays only when an employee is in a **Leave** status. Reflects the date the employee is due to return from leave.

General Assignment Information	
Assignment Category	12 Three 12-Hour Shifts
Status	Leave With Pay
Expected Return Date	12-FEB-2005

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- **ORGANIZATION** – displays the Organization the employee is affiliated with.

General Assignment Information			
Assignment Category	01 Regular FT	Job	AC108E1.Exec Asst I
Status	Active Assignment	Grade	W.G14
Expected Return Date		Payroll Group	Staff 12
Organization	320000000 School of Dentistry Dea	Timecard Dist Number	
Location	Bham Main Campus	Timekeeping Method	
Position	320000000.52201.031001	Timekeeping Organization	

- **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.
- Position 320000000.52201.031001
- **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.

Timekeeping Method	TEL
Timekeeping Organization	090000000 Athletics Department Adr

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.

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The **SALARY (DATA INQUIRY) FORM** displays the employee's:

Projected Salary	xx.xxx.xx	Actual Rate Of Pay	xx.xx
FTE	1	CFB Code	GROUP C
Hosp Calc Code		Premium Plan	NA
Salary Basis	Hourly	Payroll	Biweekly
Outside Income Source		Outside Income	0.00

[Return to Previous Form](#)

- **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**.

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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](#).

Projected Assignment Salary: xx,xxx.xx Element Name: [dropdown]

Costing

Assignment	Element	From Date	To Date	GL Account	Project	Task	%
		04-SEP-2005		2100290.000.123500000.350000000.			100

Total LD % 100

Return to Previous Form

- **PROJECT, TASK, AWARD, ORGANIZATION (PTAO)** – the Grant Account, Task, Award and Organization in which the employee's salary will be paid from. For information pertain to the Grants Accounting Structure, [click here](#).

Projected Assignment Salary: xx,xxx.xx Element Name: [dropdown]

Costing

Assignment	Element	From Date	To Date	GL Account	Project	Task	%
		01-OCT-2010	31-DEC-2011		1234567	01.01	100

Total LD % 100

Return to Previous Form

- **% (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**.

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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	Element Name	Effective Start Date	Effective End Date
<input checked="" type="checkbox"/>	Supplemental	01-MAR-2011	31-MAR-2011
<input type="checkbox"/>			

- **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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