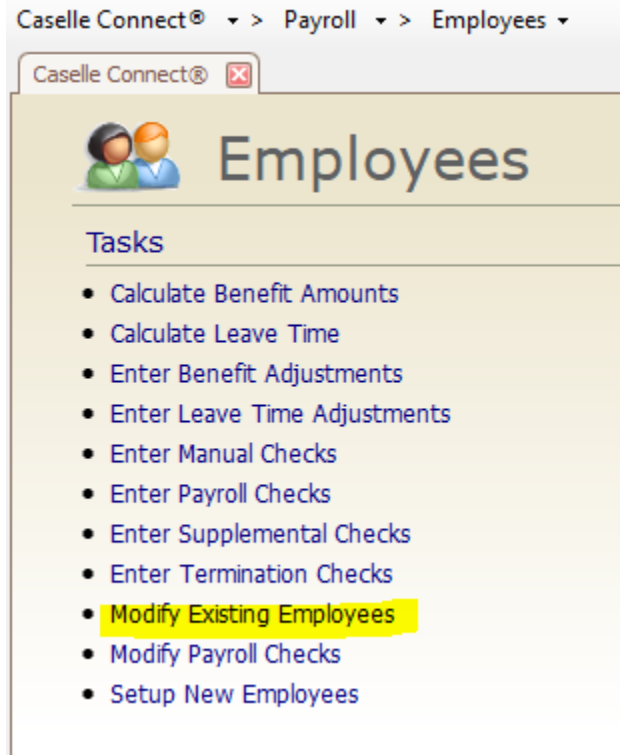
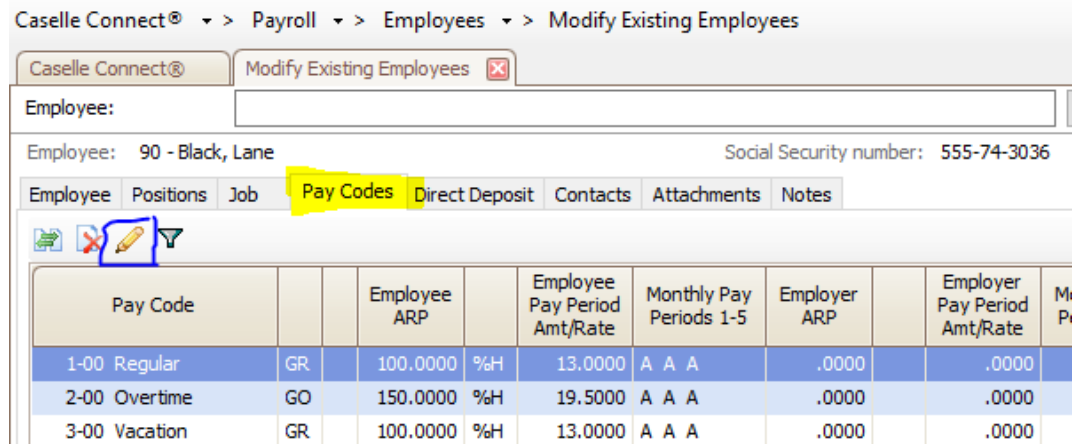


Terminating an Employee

1. On final payroll
 - a. Remove Standard Hours
 - i. Go to Payroll – Employees – Modify Existing Employees



- ii. Select employee
 - iii. Click on Pay Codes tab and click the pencil to edit pay code 1 (may be 1-01 etc)



- iv. Click in the Standard Hours field change the amount to zero.

Caselle Connect® > Payroll > Employees > Modify Existing Employees

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes

Pay Code

- 1-00 Regular
- 2-00 Overtime
- 3-00 Vacation
- 4-00 Sick Leave
- 7-00 Holiday
- 8-00 Misc Pay
- 9-00 Comp Time
- 74-00 Soc Sec
- 75-00 Medicare
- 76-00 FWT
- 77-00 SWT
- 85-00 Net Pay

Employee Limits Employer Employer Limits Leave Rates General

ARP type: Hourly

Rate: 100.0000

Extra amount: .00

GL Account: FF-DD-110

Allocation method: Use employee allocations

Calculation:

Standard hours: 80.00

Exemptions: 0

Additional exemptions: 0

Begin date:

End date:

Exclude hours

Monthly period numbers

1 2 3 4 5

A A A

- b. Stop accrual of leave balances

- i. While still on the pay code tab of the employee record, select the first leave pay code assigned to the employee
- ii. Click the pencil to edit (if not already in edit view)
- iii. Click on the Leave Rates tab

Caselle Connect® > Payroll > Employees > Modify Existing Employees

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes

Employee Limits Employer Employer Limits Leave Rates General

Leave Rate

Leave Rate	Leave Level
Vacation - Percentage (302)	Vacation - 6+ years (2)

Leave rate: Vacation - Percentage (302)

Leave level: Vacation - 6+ years (2)

Next level date:

Pay code leave: 105.36

Stop leave time accrual

- iv. Check the box to Stop leave time accrual (on the right hand side of the screen)

Leave Rate

Leave rate: Vacation - Percentage (302)

Leave level: Vacation - 6+ years (2)

Next level date:

Pay code leave: 105.36

Stop leave time accrual

- v. Repeat for each leave time pay code assigned to the employee

- c. Remove leave balances

- i. After processing the employees payroll check, print the leave time report to see the remaining leave balance for the employee by going to Payroll – Employees –

Leave Report

Caselle Connect® > Payroll > Employees

Caselle Connect®

Employees

Tasks

- Calculate Benefit Amounts
- Calculate Leave Time
- Enter Benefit Adjustments
- Enter Leave Time Adjustments
- Enter Manual Checks
- Enter Payroll Checks
- Enter Supplemental Checks
- Enter Termination Checks
- Modify Existing Employees
- Modify Payroll Checks
- Setup New Employees

Related Reports

- Benefits Register - Detail
- Benefits Register - Summary
- Check Register
- Custom Forms/Letters
- Employee Compensation Report
- Employee List
- Employee Tax Summary
- Leave Register
- **Leave Report**
- Pay Code Transaction Report
- Pay Schedules Report
- Payroll Checks
- Payroll History
- Payroll Detail Worksheet

- ii. Go to Payroll – Employees – Enter Leave Time Adjustment

Caselle Connect® > Payroll > Employees

Caselle Connect®

Employees

Tasks

- Calculate Benefit Amounts
- Calculate Leave Time
- Enter Benefit Adjustments
- **Enter Leave Time Adjustments**
- Enter Manual Checks
- Enter Payroll Checks
- Enter Supplemental Checks
- Enter Termination Checks
- Modify Existing Employees
- Modify Payroll Checks
- Setup New Employees

- iii. Enter the employee (name or number), the leave time pay code and the hours as a negative amount to remove any remaining balances

Caselle Connect® > Payroll > Employees > Enter Leave Time Adjustments

Caselle Connect® Enter Leave Time Adjustments

Current pay period: 12/27/2018 - 1/9/2019 Period number: 2

Reference number: 1

Employee: [Dropdown]

Pay code: [Dropdown]

Hours: 0

Leave transactions:

Reference Number	Employee Number	Name	Pay Code
------------------	-----------------	------	----------

- iv. Repeat for each leave time balance the employee has
2. After the final payroll for the employee
- a. Record the termination date

- i. Go to Payroll – Employees – Modify Existing Employees

Caselle Connect® > Payroll > Employees

Caselle Connect®

Employees

Tasks

- Calculate Benefit Amounts
- Calculate Leave Time
- Enter Benefit Adjustments
- Enter Leave Time Adjustments
- Enter Manual Checks
- Enter Payroll Checks
- Enter Supplemental Checks
- Enter Termination Checks
- **Modify Existing Employees**
- Modify Payroll Checks
- Setup New Employees

- ii. Select employee
- iii. Click on Job tab and enter the termination date (the last day worked by the employee/last day of employment)

Caselle Connect® > Payroll > Employees > Modify Existing Employees

Caselle Connect® Modify Existing Employees

Employee: Employee

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes

Job State Unemployment Retirement

Work state: WI Wisconsin

Hire date: 06/10/2006

Additional years of service: 0 Years of service: 12

Start date:

Anniversary date: 06/10/2006

Termination date:

Payroll type: Hourly

Job class: Staff

Status: Full-Time

Include on W-2 Form

☐ Statutory

☐ Retirement plan

☐ Third party sick pay

- b. Record a termination reason

- i. While still in Modify Existing Employees, click on the Notes tab for the employee being terminated

Caselle Connect® > Payroll > Employees > Modify Existing Employees

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments **Notes**

Notes:

- ii. Enter a termination reason. Common examples include retired, quit, but you can be as descriptive as your organization feels appropriate.
3. Terminate access within the software for the employee (if applicable)
- a. Go to System Management – Security – Setup/Modify User Rights

Caselle Connect® > System Management > Security

Security

Tasks

- Modify Security Settings
- Setup/Modify Group Rights
- **Setup/Modify User Rights**
- View Active Workstations
- View Application Licenses
- Setup/Modify Third Party Access

- b. Select the user by searching by the employee name

Caselle Connect® > System Management > Security > Setup/Modify User Rights

Setup/Modify User Rights

User: [Yellow Highlighted Field]

- c. Uncheck the box for Activate user and Check the box for Lock login

User Databases Notes

User ID: Lane

Name: Lane Black

Network user ID: lblack

Password: [Change...]

☐ Require user to change their password at login

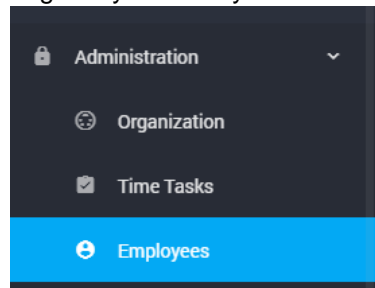
☐ **Activate user** ☒ **Lock login**

☐ Notify user if program updates are available

Zoom

4. Change employee status in miPayOnline to Read Only

- a. Log into your miPayOnline account and go to the Administration – Employee Menu



- b. Select the terminated employee , click on the employee name (single click)

<input checked="" type="checkbox"/>	Em...	Name	Email
	<input type="text"/>	<input type="text" value="lane"/>	<input type="text"/>
<input checked="" type="checkbox"/>	90	Black, Lane	

- c. Check the box to mark the employee as Read Only

Edit Employee

Employee Number

90

Name

Black, Lane

Email Address

lane@mipayonline.com

Standard Pay Period Hours

0

Time Entry Days

Time Off Calendar Color

#A49B2D

Other

☐ Site Administrator

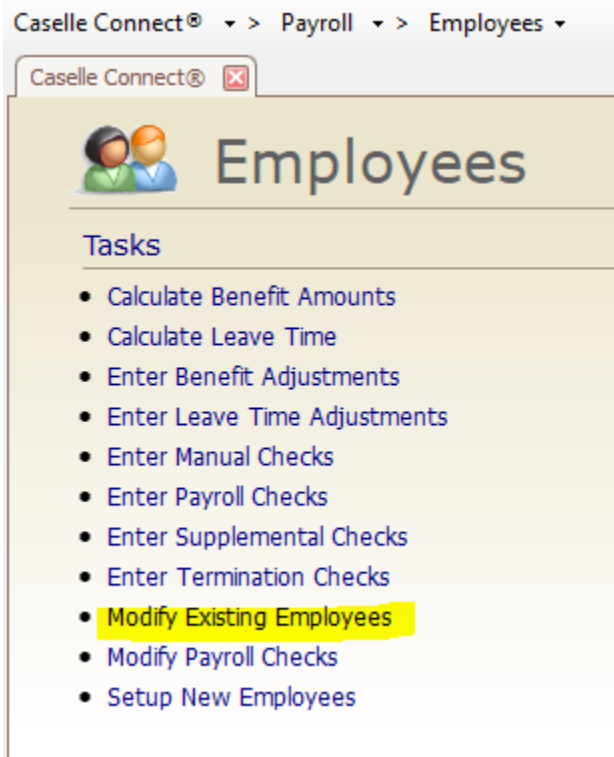
☒ Read Only

☐ Locked Out?

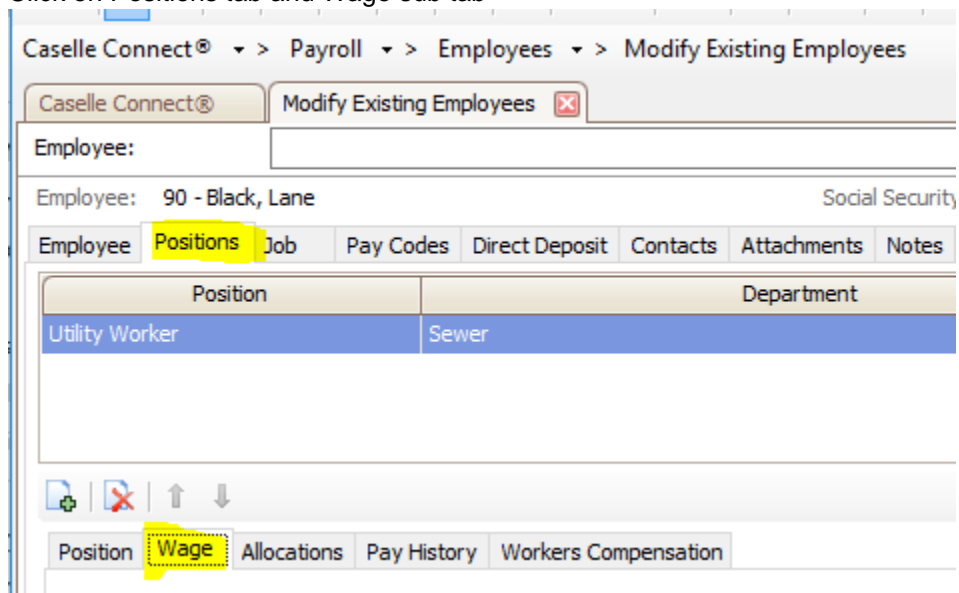
5. Change the employee password in miViewPoint
6. Notify support@civicsystems.com that the employee is no longer active for support/remote hosting.

Common issues regarding changes to an employee status (other than termination)

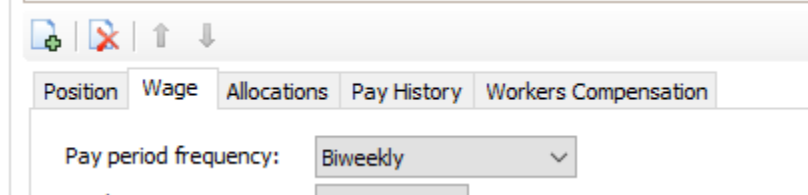
1. Change in employee pay frequency.
 - a. Go to Payroll – Employees – Modify Existing Employees



- b. Select employee
 - c. Click on Positions tab and Wage sub tab



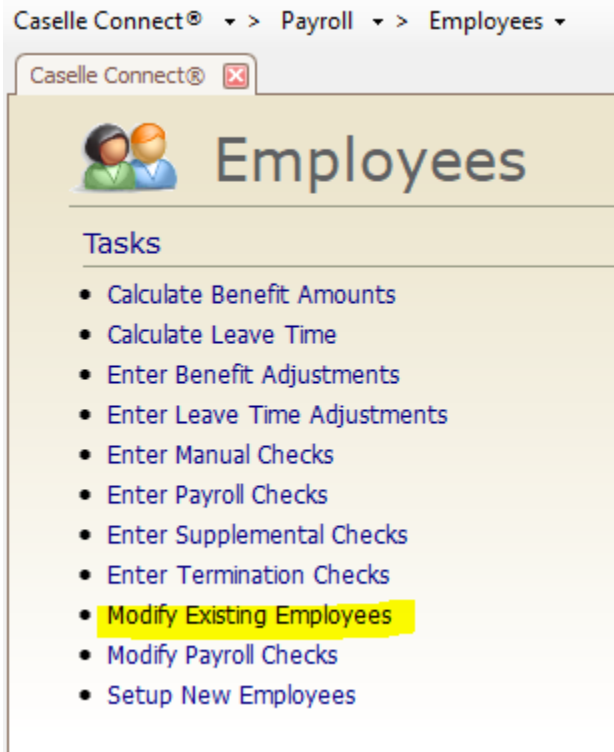
- d. Change the Pay Period Frequency to the new appropriate frequency. This is very important as it controls the tax calculation for the employee



The screenshot shows a web application interface with a toolbar at the top containing icons for adding, deleting, and moving items. Below the toolbar are five tabs: 'Position', 'Wage', 'Allocations', 'Pay History', and 'Workers Compensation'. The 'Wage' tab is currently selected. Below the tabs, there is a label 'Pay period frequency:' followed by a dropdown menu that has 'Biweekly' selected.

2. Ending a Pay Code for an employee. If an employee will no longer be earning or having a deduction/benefit made on a specific pay code, it should be terminated.

- a. Go to Payroll – Employees – Modify Existing Employees



The screenshot shows the 'Caselle Connect®' application window. The breadcrumb navigation at the top reads 'Caselle Connect® > Payroll > Employees'. The main heading is 'Employees' with an icon of two people. Below the heading is a section titled 'Tasks' which contains a list of actions:

- Calculate Benefit Amounts
- Calculate Leave Time
- Enter Benefit Adjustments
- Enter Leave Time Adjustments
- Enter Manual Checks
- Enter Payroll Checks
- Enter Supplemental Checks
- Enter Termination Checks
- **Modify Existing Employees**
- Modify Payroll Checks
- Setup New Employees

- b. Select employee

- c. Click on Pay Codes tab and click the pencil to edit pay code


Caselle Connect® > Payroll > Employees > Modify Existing Employees

Caselle Connect® Modify Existing Employees

Employee: Employee

Employee: 90 - Black, Lane Social Security number: 555-74-3036


Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes



Pay Code		Employee ARP	Employee Pay Period Amt/Rate	Monthly Pay Periods 1-5	Employer ARP	Employer Pay Period Amt/Rate	Monthly Pay Periods 1-5
1-00 Regular	GR	100.0000	%H	13.0000	A A A	.0000	.0000
2-00 Overtime	GO	150.0000	%H	19.5000	A A A	.0000	.0000
3-00 Vacation	GR	100.0000	%H	13.0000	A A A	.0000	.0000
4-00 Sick Leave	GR	100.0000	%H	13.0000	A A A	.0000	.0000
7-00 Holiday	GR	100.0000	%H	13.0000	A A A	.0000	.0000
8-00 Misc Pay	GM	.0000	\$A	.0000	A A A	.0000	.0000
9-00 Comp Time	GR	100.0000	%H	13.0000	A A A	.0000	.0000
74-00 Soc Sec	SS	-6.2000	%A	-5.2390	A A A A A	6.2000	%A 5.2390 A A A A A
75-00 Medicare	MD	-1.4500	%A	-1.2253	A A A A A	1.4500	%A 1.2253 A A A A A
76-00 FWT	FW	.0000	CA	.0000	A A A A A	.0000	.0000
77-00 SWT	SW	.0000	CA	.0000	A A A A A	.0000	.0000
85-00 Net Pay	N	.0000	\$A	.0000	A A A A A	.0000	.0000
90-00 PERA	I	.0000		.0000	8.6900	%A 7.3431	A A A A A
91-00 Health	I	.0000		.0000	554.6000	\$A 554.6000	A
92-00 LTD Ins	I	.0000		.0000	.6000	%A .5070	A A A A A
98-00 SUTA	SU	.0000		.0000	.3700	%A .3127	A A A A A
99-00 Wrk Comp	WC	.0000		.0000	.0000	%A .0000	A A A A A

- d. Enter an End date on the employee or employer tab as appropriate. The end date MUST be at least 1 day after the check issue date the pay code was used on last. For example, if health insurance was last withheld/calculated for the employee on the 4/13/19 payroll and the check issue date of that payroll is 4/19/19, the end date must be 4/20/19 or later. This date may need to be recorded on both the employee and employer tabs of the pay code.

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes



Pay Code

1-00 Regular
2-00 Overtime
3-00 Vacation
4-00 Sick Leave
7-00 Holiday
8-00 Misc Pay
9-00 Comp Time
74-00 Soc Sec
75-00 Medicare
76-00 FWT
77-00 SWT
85-00 Net Pay
90-00 PERA
91-00 Health
92-00 LTD Ins
98-00 SUTA
99-00 Wrk Comp

Employee Employee Limits Employer Employer Limits Leave Rates General

ARP type: Amount
Amount: 554.60
Extra amount: .00
Debit account: FF-DD-130
Credit account: Partial Account
Allocation method: Health Insurance Payable
Calculation: Use transactions
Modifier: 100.00

Begin date:
End date:
☐ Calculate on unpaid employee

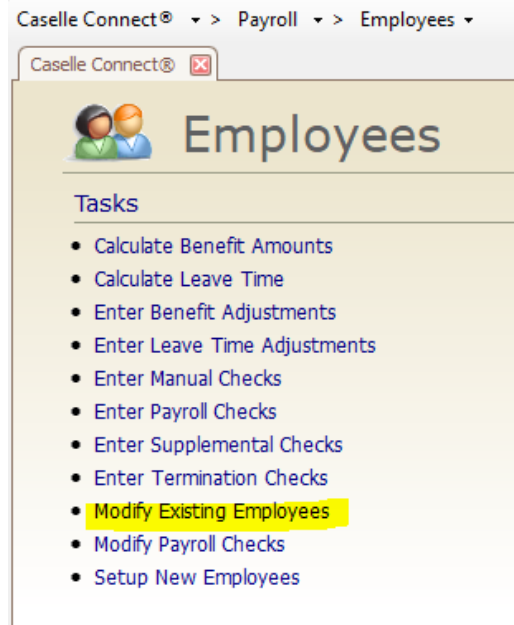
Monthly period numbers
1 2 3 4 5
A ..

Comments:

3. Starting a Pay Code for an employee. If an employee will begin be a new earning/deduction/benefit, it may require a begin date. The most common reason for a begin

date on a pay code is if an existing employee becomes eligible for retirement or social security/medicare at a time other than upon hire. A begin date will allow the system to accurately calculate the wage that are subject to retirement/social security/medicare.

- a. Go to Payroll – Employees – Modify Existing Employees



Caselle Connect® > Payroll > Employees

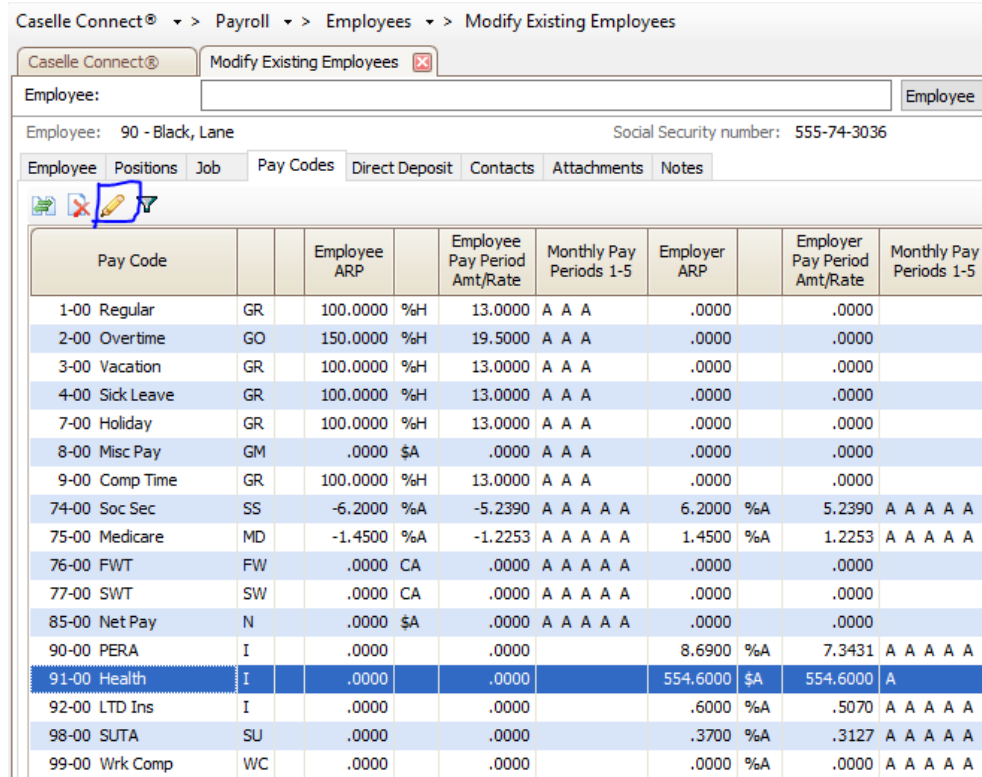
Employees

Tasks

- Calculate Benefit Amounts
- Calculate Leave Time
- Enter Benefit Adjustments
- Enter Leave Time Adjustments
- Enter Manual Checks
- Enter Payroll Checks
- Enter Supplemental Checks
- Enter Termination Checks
- **Modify Existing Employees**
- Modify Payroll Checks
- Setup New Employees

- b. Select employee

- c. Click on Pay Codes tab and click the pencil to edit pay code (assumes you have already added it to the employee)




Caselle Connect® > Payroll > Employees > Modify Existing Employees

Employee: Employee

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes



Pay Code		Employee ARP	Employee Pay Period Amt/Rate	Monthly Pay Periods 1-5	Employer ARP	Employer Pay Period Amt/Rate	Monthly Pay Periods 1-5
1-00 Regular	GR	100.0000 %H	13.0000	A A A	.0000	.0000	
2-00 Overtime	GO	150.0000 %H	19.5000	A A A	.0000	.0000	
3-00 Vacation	GR	100.0000 %H	13.0000	A A A	.0000	.0000	
4-00 Sick Leave	GR	100.0000 %H	13.0000	A A A	.0000	.0000	
7-00 Holiday	GR	100.0000 %H	13.0000	A A A	.0000	.0000	
8-00 Misc Pay	GM	.0000 \$A	.0000	A A A	.0000	.0000	
9-00 Comp Time	GR	100.0000 %H	13.0000	A A A	.0000	.0000	
74-00 Soc Sec	SS	-6.2000 %A	-5.2390	A A A A A	6.2000 %A	5.2390	A A A A A
75-00 Medicare	MD	-1.4500 %A	-1.2253	A A A A A	1.4500 %A	1.2253	A A A A A
76-00 FWT	FW	.0000 CA	.0000	A A A A A	.0000	.0000	
77-00 SWT	SW	.0000 CA	.0000	A A A A A	.0000	.0000	
85-00 Net Pay	N	.0000 \$A	.0000	A A A A A	.0000	.0000	
90-00 PERA	I	.0000	.0000		8.6900 %A	7.3431	A A A A A
91-00 Health	I	.0000	.0000		554.6000 \$A	554.6000	A
92-00 LTD Ins	I	.0000	.0000		.6000 %A	.5070	A A A A A
98-00 SUTA	SU	.0000	.0000		.3700 %A	.3127	A A A A A
99-00 Wrk Comp	WC	.0000	.0000		.0000 %A	.0000	A A A A A

- d. Enter a Begin date on the employee or employer tab as appropriate. The begin date should be the date the employee became eligible but MUST be at least 1 day after the

last check issue date in which the employee was not eligible. For example, an employee became eligible for retirement starting on the 4/14/19 payroll. The prior payroll ended on 4/13/19 payroll and the check issue date of that payroll was 4/19/19, the begin date must be 4/20/19 or later. This date may need to be recorded on both the employee and employer tabs of the pay code.

Caselle Connect® > Payroll > Employees > Modify Existing Employees

Caselle Connect® Modify Existing Employees

Employee: Employee

Employee: 90 - Black, Lane Social Security number: 555-74-3036

Employee Positions Job Pay Codes Direct Deposit Contacts Attachments Notes

Pay Code

1-00 Regular

2-00 Overtime

3-00 Vacation

4-00 Sick Leave

7-00 Holiday

8-00 Misc Pay

9-00 Comp Time

74-00 Soc Sec

75-00 Medicare

76-00 FWT

77-00 SWT

85-00 Net Pay

90-00 PERA

91-00 Health

92-00 LTD Ins

98-00 SUTA

99-00 Wrk Comp

Employee Employer Limits Employer Employer Limits Leave Rates General

ARP type: Percent of amount [Copy to employee](#) Begin date: 04/20/2019

Percentage: 8.6900 % End date:

Extra amount: .00 ☐ Calculate on unpaid employee

Debit account: FF-DD-130

Credit account: 02-22500

Allocation method: Retirement Payable

Calculation:

Modifier: 100.00

Monthly period numbers
1 2 3 4 5
A A A A A ..

Comments: