Terminating an Employee

1. On final payroll

- a. Remove Standard Hours
 - 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 Pay Codes tab and click the pencil to edit pay code 1 (may be 1-01 etc) Caselle Connect® -> Payroll -> Employees -> Modify Existing Employees

	Caselle Connect®	Modify	Existin	g Employee:	s 🗵						
1	Employee:										
	Employee: 90 - Black, Lane Social Security number: 555-74-3036										
	Employee Positions	Job F	Pay Co	<mark>des D</mark> irect	Depos	it Contacts	Attachments	Notes			
	Pay Code			Employee ARP		Employee Pay Period Amt/Rate	Monthly Pay Periods 1-5	Employer ARP		Employer Pay Period Amt/Rate	Mi Pi
	1-00 Regular	GR		100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000	
	2-00 Overtime	GO)	150.0000	%Н	19.5000	ΑΑΑ	.0000		.0000	
	3-00 Vacation	GR		100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000	

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

с	aselle Connect®	9 + > Pay	vroll • > Er	mployees 🔹	Modify Ex	isting Employ	ees							
ſ	Caselle Connect@	Mod	lify Existing Em	nployees 🗵										
6	Employee:										Emp	loyee		~
h	Employee: 90 -	Black, Lane				Socia	Security nu	mber:	555-74	-3036				
	Employee Posit	ions Job	Pay Codes	Direct Deposi	t Contacts	Attachments	Notes							
	🖹 📡 🥖 🛛	7												
	Pay Co	de	Employee	Employee Limit	s Employer	Employer Lim	its Leave F	Rates	Genera	I				
	1-00 Regula		ARP type	:	Hourly	\sim			Begin d	late:				
	2-00 Overtin	ne	Rate:		100.0000				End da	te:				
	3-00 Vacatio	n	Extra am	ount:	.00				Ex	dude h	ours			
	4-00 Sick Lea	ave	GL Account:		FF-DD-110				Monthly period number					
	7-00 Holiday								1 2		3	4	5	
	8-00 Misc Pa	у	Allocation	method:	Lise employe	e allocations			Α	Α	Α			
	9-00 Comp 1	îme			ose employ									
	74-00 Soc Se	:	Calculatio	on:		-		\sim						
	75-00 Medica	re	Standard	hours:	80.00									
	76-00 FWT		Exemptio	ns:	0									
	77-00 SWT		Additions	levenations										
	85-00 Net Pa	y	Auditiona	a exemptions:	v									
	00-00 DED 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® -> Pay	vroll • > Employees • > Modify Ex	isting Employees		
Caselle Connect® Mod	ify Existing Employees 🛛			
Employee:			Employee	✓ ▲ 18 of:
Employee: 90 - Black, Lane		Social Security number:	555-74-3036	
Employee Positions Job	Pay Codes Direct Deposit Contacts	Attachments Notes		
🖹 📡 🥖 🝸				
	Employee Employee Limits Employer	Employer Limits Leave Rates	Separal	
Pay Code	Employee Employee Emilis Employer	Employer Emilis Leave rates		
	Leave Rate	Leave Level		
1-00 Regular	Vacation - Percentage (302)		Leave Rate	
2-00 Overtime				
3-00 Vacation			Leave rate:	Vacation - Percentage (302)
4-00 Sick Leave			Leave level:	Vacation - 6+ years (2) ~
7-00 Holiday				
8-00 Misc Pay			Next level date:	
9-00 Comp Time			Pay code leave:	105.36
74-00 Soc Sec			Stop leave tin	ne accrual
75-00 Medicare				
76-00 FWT				

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

à 👔		
Leave Rate		
Leave rate:	Vacation - Percentage (302)	
Leave level:	Vacation - 6+ years (2)	~
Next level date:		
Pay code leave:	105.36	
Stop leave tin	ne 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

selle Connect® • > Payroll • > Employees • aselle Connect®	
🥵 Employees	
Tasks	Related Reports
Calculate Benefit Amounts	Benefits Register - Detail
Calculate Leave Time	 Benefits Register - Summary
 Enter Benefit Adjustments 	Check Register
Enter Leave Time Adjustments	Custom Forms/Letters
Enter Manual Checks	 Employee Compensation Report
Enter Payroll Checks	 Employee List
Enter Supplemental Checks	Employee Tax Summary
Enter Termination Checks	Leave Register
 Modify Existing Employees 	Leave Report
Modify Payroll Checks	 Pay Code Transaction Report

Setup New Employees

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- Pay Schedules Report
- Payroll Checks
- Payroll History
- Davroll Dralict Workshaat

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

cuscile connect in a provide a comproyees
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
Enter the employee (name or i as a negative amount to remov

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

1	Laselle Connecto	r > Payroll + >	cinpioyees *	> Enter Leave Times	Aujustinents
(Caselle Connect®	Enter Leave Tim	e Adjustments		
	Current pay period:	12/27/2018 - 1/9/20	19	Period number:	2
	Reference number:	1			
	Employee:	I			-
	Pay code:	•			
	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

Cas	;elle 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. Click on Job tab and enter the termination date (the last day worked by the employee/last day of employment). Do NOT enter a termination date on the positon tab unless the employee is still employed but changing positions.

Caselle Connect® 👻	> Payr	oll • > Em	nployees 👻 >	Modify Ex	isting Employ	ees				
Caselle Connect®	Modif	y Existing Emp	oloyees 🔟							
Employee:								Employee		
Employee: 90 - Black, Lane			Social Security number: 555-74-3036							
Employee Positions	Employee Positions Job		Direct Deposit	Contacts	Attachments	Notes				
Job State Unemp	oloyment	Retirement	:							
Work state: Hire date: Additional years of service: Start date: Anniversary date: Termination date:		WI ~ 1 06/10/2000 0 06/10/2000	Wisconsin 5 H Years 5 H 5 H	of service:	12		Include on W-2 Form Statutory Retirement plan Third party sick	n		
Payroll type:		Hourly		\sim						
Job class:		Staff		\sim						
Status:		Full-Time		\sim						

b. Record a termination reason

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

Cas	aselle Connect® → > Payroll → > Employees → > Modify Existing Employees												
Ca	selle Cor	nnect®	Modi	fy Existing Em	ployees 🔯								-
Em	oloyee:								Employee	~ 🚺	4 18	of 26	
Em	oloyee:	90 - Black	, Lane				Social Security number:	555-74-3036					Terminated
Em	ployee	Positions	Job	Pay Codes	Direct Deposit	Contacts	Attachments Notes						
1	lotes:												
												\sim	

- 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® + > S	ystem Management 🔹 > Security 👻
	Caselle Connect® 🔯	
	Sec	urity
	Tasks	
	Modify Security S	Settings
	 Setup/Modify Gro 	oup Rights
	 Setup/Modify Us 	er Rights
	 View Active Wor 	kstations
	 View Application 	Licenses
	 Setup/Modify Th 	Ird Party Access
b. S	Select the user by s	searching by the employee name
С	aselle Connect® 🔹 > Sy	/stem Management + > Security + > Setup/Modify User Rights
ſ	Caselle Connect®	tup/Modify User Rights
	User:	
_		
c. L	Incheck the box fo	r Activate user and Check the box for Lock login
	User Databases	Notes
	User ID:	Lane I
	Name:	Lane Black
	Network user ID:	lblack
	Password:	Change
	Require user to	change their password at login
	Activate user	Lock login
	Notify user if pr	ogram updates are available

4. Change employee status in miPayOnline to Read Only

700m -

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)

	Name -					
Q	⊂ slade					
35	Slade, Randy L					

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

Edit Employ	ree			
Standard Pay Pe 0	eriod Hours			
Time Entry [Days			
Time Off Cale #184D5D	ndar Color			
Other				
☐ Site Adm ☐ Read On	inistrator ly			
Templates Time Off Templo Jacob Smith	_{ite} Template			
Time Entry 1	- emplate			
Work Days	of Week			
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRID
		,		
SAVE	CANCEL		EE ACCESS	

d. Remove Time Off and Time Entry templates.

- 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.



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



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



b. Select employee

c. Click on Pay Codes tab and click the pencil to edit pay code Caselle Connect® • > Payroll • > Employees • > Modify Existing Employees

	i ac eas										
Caselle Connect® Mo	dify Exist	ing Employee	s 🔛								
Employee:									Employee		
Employee: 90 - Black, Lane Social Security number: 555-74-3036											
Employee Positions Job	Pay C	Codes Direct	Depos	sit Contacts	Attachments	Notes					
Pay Code		Employee ARP		Pay Period Amt/Rate	Monthly Pay Periods 1-5	Employer ARP		Pay Period Amt/Rate	Monthly Pay Periods 1-5		
1-00 Regular	GR	100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000			
2-00 Overtime	GO	150.0000	%Н	19.5000	ΑΑΑ	.0000		.0000			
3-00 Vacation	GR	100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000			
4-00 Sick Leave	GR	100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000			
7-00 Holiday	GR	100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000			
8-00 Misc Pay	GM	.0000	\$A	.0000	ΑΑΑ	.0000		.0000			
9-00 Comp Time	GR	100.0000	%Н	13.0000	ΑΑΑ	.0000		.0000			
74-00 Soc Sec	SS	-6.2000	%A	-5.2390	A A A A A	6.2000	%A	5.2390	AAAAA		
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	Ι	.0000		.0000		554.6000	\$A	554.6000	A		
92-00 LTD Ins	Ι	.0000		.0000		.6000	%A	.5070	A A A A A		
98-00 SUTA	SU	.0000		.0000		.3700	%A	.3127	AAAAA		
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.

E	mployee	Positions	Job	Pay Codes	Direct De	oosit	Contacts	Attachments	Note	es						
	n 💊 🤉	0 T														
		Pay Code		Employee	Employee I	limits	Employer	Employer Lim	its L	eave Rates	Genera	I				
		ay code		ARP type		Amou	int	~			Begin d	late:				a
	1-00 F	Regular		And type		Amou					begint	in the l				1
	2-00 0	Overtime		Amount:		554.6	50				End da	te:				
	3-00 \	/acation		Extra amo	ount:	.00					Cal	culate	on unp	oaid er	nploye	e
	4-00 5	Sick Leave		Debit acc	ount:	FF-DD	0-130			-	Mont	hly per	riod nu	mbers		
	7-00 H	Holiday				Partia					1	2	3	4	5	
	8-00 N	Misc Pay		Creditac	ount:	02-22	2600				A					
	9-00 0	Comp Time		Ci cuit act	Louire.	02 22										
	74-00 5	Soc Sec				Healt	h Insuranci	e Payable			Comme	ents:				
	75-00 N	Medicare		Allocation	method:	Use t	ransaction	s v								
	76-00 F	=WT		Calculatio	n:					\sim						
	77-00 5	SWT		Modifier:		100.0	00									
	85-00 N	Vet Pay														
	90-00 F	PERA														
	91-00 H	Health														
	92-00 L	TD Ins														
	98-00 5	SUTA														
	99-00 \	Wrk Comp														

- 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



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)

diselle connector	Modify Ex	cisting Em	pioyee	s 🔟 [
Employee:											Emplo	yee
Employee: 90 - Black, L	ane.						Socia	al Security nu	mber:	555-74-303	5	
Employee Positions Jo	ob Pa	y Codes	Direct	Depos	sit Contacts	Attachm	nents	Notes				
🖻 💊 🖉 🗖												
Pay Code		Emp A	oloyee ARP		Employee Pay Period Amt/Rate	Monthly Periods	Pay 1-5	Employer ARP		Employer Pay Period Amt/Rate	Monthly Periods	Pa 1-5
1-00 Regular	GR	100	0.0000	%Н	13.0000	ΑΑΑ		.0000		.0000		
2-00 Overtime	GO	150	0.0000	%Н	19.5000	ΑΑΑ		.0000		.0000		
3-00 Vacation	GR	100	0.0000	%Н	13.0000	ΑΑΑ		.0000		.0000		
4-00 Sick Leave	GR	100	0.0000	%Н	13.0000	ΑΑΑ		.0000		.0000		
7-00 Holiday	GR	100	0.0000	%Н	13.0000	ΑΑΑ		.0000		.0000		
8-00 Misc Pay	GM		.0000	\$A	.0000	ΑΑΑ		.0000		.0000		
9-00 Comp Time	GR	100	0.0000	%Н	13.0000	ΑΑΑ		.0000		.0000		
74-00 Soc Sec	SS	-6	5.2000	%A	-5.2390	A A A A	A	6.2000	%A	5.2390	A A A A	A #
75-00 Medicare	MD	-1	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	Ι		.0000		.0000			8.6900	%A	7.3431	A A A A	A
91-00 Health	Ι		.0000		.0000			554.6000	\$A	554.6000	A	
92-00 LTD Ins	I		.0000		.0000			.6000	%A	.5070	AAAA	A
98-00 SUTA	SU		.0000		.0000			.3700	%A	.3127	A A A A	A A
99-00 Wrk Comp	WC		.0000		.0000			.0000	%A	.0000		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 eneded 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® -> Pa	yroll • > Employees	- > Modify Exi	sting Employee	s			
Caselle Connect® Moo	dify Existing Employees 🛽 🛽	3					
Employee:						Employee	
Employee: 90 - Black, Lane			Social S	ecurity number:	555-74-3036		
Employee Positions Job	Pay Codes Direct Dep	osit Contacts	Attachments N	lotes			
	Π						
Pay Code	Employee Employee L	imits Employer	Employer Limits	Leave Rates	General		
	ARP type:	Percent of amou	nt V Co	pov to employee	Begin date:	04/20/2019	1
1-00 Regular							<u>1</u>
2-00 Overtime	Percentage:	8.6900 %			End date:		1
3-00 Vacation	Extra amount:	.00			Calculate	on unpaid employe	e
4-00 Sick Leave	Debit account:	FF-DD-130		•	-Monthly per	riod numbers	
7-00 Holiday		Partial Account			1 2	3 4 5	
8-00 Misc Pay	Condition marks				AA	AAA	
9-00 Comp Time	Credit account:	02-22500					
74-00 Soc Sec		Retirement Paya	ble		Comments:		
75-00 Medicare	Allocation method:	Use transactions	~				
76-00 FWT	Calculation:			\sim			
77-00 SWT	Modifier	100.00					
85-00 Net Pay	riodiner	100.00					
90-00 PERA							
91-00 Health							
92-00 LTD Ins							
98-00 SUTA							
99-00 Wrk Comp							