



Terminating an Associate via Desktop

Document 2-3.

August 12th, 2021

Purpose of Activity

To learn how to process an employee's termination via Desktop device.

Background

This process is necessary for second supervisors to learn how to process an employee's termination through Paylocity's desktop application.

Prerequisites

You must have downloaded the Paylocity app onto your device and logged into your supervisor account.

<u>Calendar</u>

This process should be completed as needed.

Process:

1. From the Self Service Portal, hover over the Employees tab.







2. Select Employee Search from the list of options.



3. Click on the last name of the employee you will be terminating.

Fischer Manageme	ent LLC [89683]			🛟 po	aylocity			
E HR & Payroll	Employees HR Pa	ayroll User	Access I	Reports & Analytics App	provals Help			
							Feedback 🛛 🔴 W	/hat's New
✓ Advanced	Last Name, First Name,	Employee Id		Active 🔻 🤇	Reset		Sa	ved Search 👻
Active Filters:	× Status: Active Save s	earch as	S	ave Delete				
T Export E	mployees							- 3 of 3 items
Last Name	Preferred / First Name	Emp Id	Status	Supervisor [ld]	Div Comm	Dept	Local	Actions
Test	Employee	2	A	Test, Supervisor 2 [5]	00000 Corporate	Accounting	Boone (Non Resident)	
Test	Employee 2	4	А	Test, Supervisor 2 [5]	00000 Corporate	Accounting	Boone (Non Resident)	
Test	Supervisor 2	5	A	Lightner, Cindy [70009	9] 999999 Misc	Misc	Misc	
								- 3 of 3 items

4. Click on the Status & History tab.

Fischer Ma	< Test, Employee [2]	→ 3 Employees 1 filters applied	l	··· Close
HK & Pa	ET Employee Test Active Controller - Accounts Payable [2] Employed since 8/17/2020			Private Data
Active Fi	🖪 Employment 🛛 📾 Pay	<u> </u>	♡ Benefits 🛛 💣 Career	
ГŢ Б	Summary Position Assignments	Work Location Status & History Docu	iments Company Property Checklists	
Last Nam	Status (surgest)	Hire Date	Langth of Sanjaviny	Time in Current Basisian
<u>Test</u>	A - Active	08/17/2020	1 month	1 month
Test	≜ Rate	Pay Type Salary	Employment Type RFT - Regular Full Time	Position 1007CONTAP03 - Controller - Accounts Payable
	Level —	Position Family(/ies) Accounting	Div Comm ZZ01 - 00000 Corporate	Dept 2007 - Accounting
	Local 2001 - Boone (Non Resident)	Benefit Class DO NOT USE FULL TIME BENEFIT ELIGIBLE EMPLOYEES	Last Performance Review —	Supervisor & Reviewer SUPERVISOR 2 TEST





5. Click Manage Status and Seniority.

Fischer Ma	C Test, Employee [2]	✓ > 3 En	nployees 1 filters ap	plied			••• Close
— HK & Pay → Adva	ET Employee Test Active Controller - Accounts Payable [2] Employed since 8/17/2020						Private Data Hide Show
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	Summary Position Assignments Work Location Status & History Documents Company Property Checklists						
t] ₽	Category						
Last Nam	All						
Test	status (Current) A - Active	Hire Date 08/17/202	20	Length of Senio 1 month	ority ()	Time in Current Position 1 month	
100	Manage Status & Seniority Add H	istory 🗸					
	Date Category	Change Reason					Actions
	2020						
	V 08/31/2020 Compensation	-	Pay Type: Salary	Annual Salary: 🔒 ····			
	V 08/17/2020 Compensation	New Hire	Pay Type: Hourly				0 🗊
	✓ 08/17/2020 Status	New Hire	Employee Status: A	Active			
	V 08/17/2020 Position	_	Employment Type:	RFT - Regular Full Time	Position: Controller - Accoun	ts Payable	1

6. Select Status Change Termination from the dropdown list of HR Actions.

Fischer Management LLC [89683]	O paylocity	
Employees HR Payroll	oll User Access Reports & Analytics Approvals Help	
< Employee Update		
	Select HR Action	
ET	Select HR Action Workflow	
Employee Test	×	<u>~</u>
Employee Id	Status Change Compensation	- 11
2	Status Change Leave of Absence	
Employee Status Active	Status Change Termination	
Employed Since 08/17/2020		
Length of Service 0 Years, 1 Months		
Position 1007CONTAP03 - Controller - Accounts Payable		
Effective Date 08/17/2020		
Div Comm ZZ01 - 00000 Corporate		
Dept Z007 - Accounting		





7. Change the employee status to Terminated.

	Select HR Action					
ET	Select HR Action		Workflow			
Employee Test	Status Change Termination	\sim	Employee Termination	\sim		
Employee rest	Details					
oloyee Id	Employee Status (required)		Termination Date (required)			
Joven Status	aniho) ee statas (requires)	\sim	(equires)			
/e			Pagin Chack Data (required)			
loyed Since	Deceased		begin check bate (required)	\sim		
7/2020	Petirod		Here Access End Date (required)			
gth of Service ars, 1 Months	Terminated		Oser Access End Date (required)	#		
tion	Transferred		Do Not Deactivate User			
7CONTAP03 - Controller - Accounts						
ative Date	Note					
7/2020						
Comm I - 00000 Corporate						
t	Submit for Approval	ol				

8. Select the Involuntary or Voluntary reason for the termination.

	Select HR Action			
ET	Select HR Action		Workflow	
Employee Test	Status Change Termination	\sim	Employee Termination	\sim
	Details			
Employee Id				
2	Employee Status (required)		Termination Date (required)	
Employee Status	Terminated	\sim		₩
Active	hange Reason (required)		Begin Check Date (required)	
Employed Since		~		\sim
08/01/2020				
Least of Carrier	Involuntary- Attendance		User Access End Date (required)	
2 Years 2 Months	Involuntary- Death			#
2 rears, 5 Monuis	Involuntary- Performance		Do Not Deactivate User	
Position	Involuntary-Policy Violation or Misconduct		0	
_	Voluntary- Career Growth/Opportunity			
	Voluntary- Compensation			
Not Employed Since	Voluntary- Job Abandonment			
	Voluntary- Lack of Fit			
Effective Date	Voluntary- Lack of Flexibility			
10/31/2022	Voluntary- Other			
2. 000 CT00	Voluntary-Co-On Completed			
Div Comm	Additional Desument(s)			
2201 - 00000 Corporate				
Dept	Add document (i)			
Z007 - Accounting	Select File			
Local				
2001 - Boone (Non Resident)				





- **9.** Complete the remaining details and add any comments you would like to share with the 2nd level supervisor.
 - a. Please note that the most common reasons for termination are resignation and retirement.
- **10.** Click Submit for Approval to submit the status change to the 2nd level supervisor.

Employee Update			
	Select HR Action		
ET	Select HR Action	Workflow	
Employee Test	Status Change Termination	Employee Termination	\sim
Employee rest	Details		
mployee Id	Employee Status (required)	Termination Date (required)	
	Terminated	< 09/25/2020	m
mployee Status ctive	Change Reason (required)	Regin Check Date (required)	
mployed Since	Resignation	/ 10/09/2020	\sim
8/17/2020			
ength of Service	Eligible for Rehire?	User Access End Date (required)	
Years, 1 Months		05/01/2021	E
osition		Do Not Deactivate User	
007CONTAP03 - Controller - Accounts			
ayable	Note		
ffective Date 8/17/2020	Add any comments you'd like the second level supervisor to se	e here.	
iv Comm			