

## Terminating an Associate via Desktop

Document 2-3.

August 12<sup>th</sup>, 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

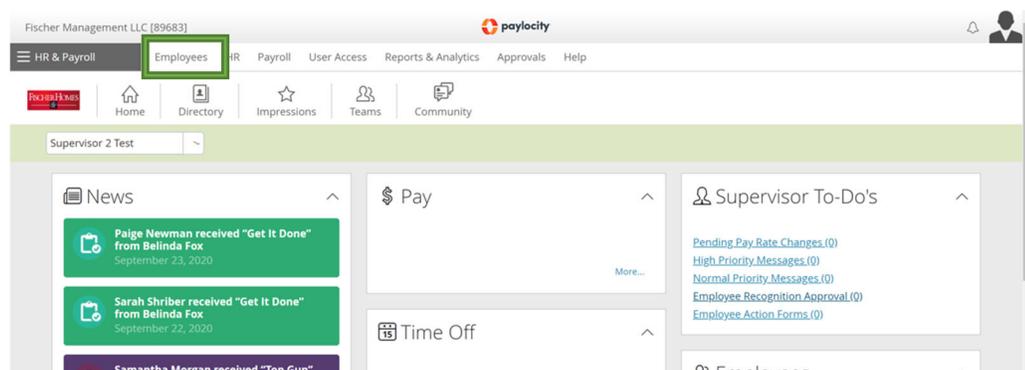
You must have downloaded the Paylocity app onto your device and logged into your supervisor account.

### Calendar

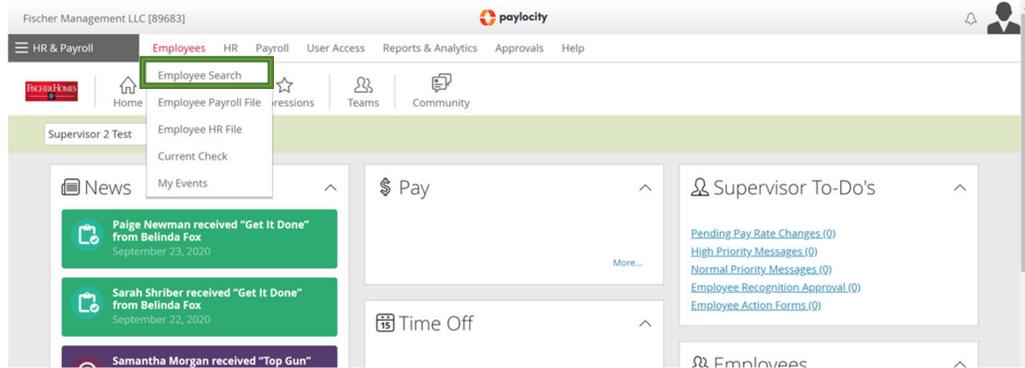
This process should be completed as needed.

### Process:

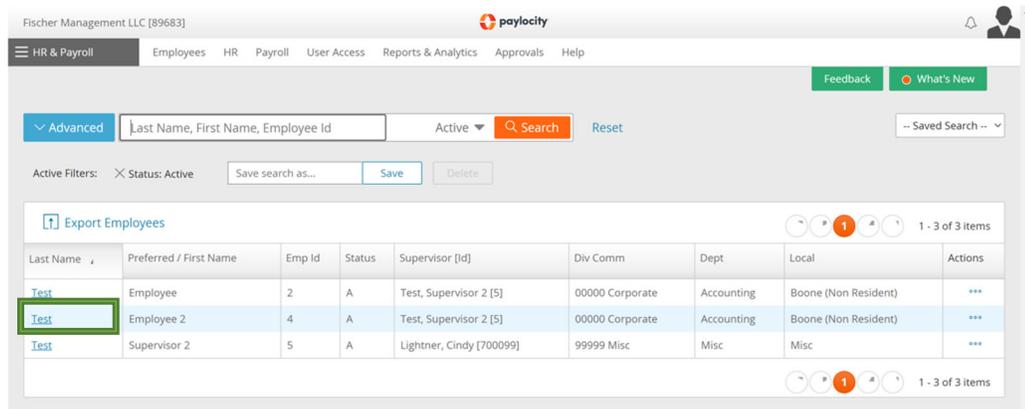
1. From the Self Service Portal, hover over the Employees tab.



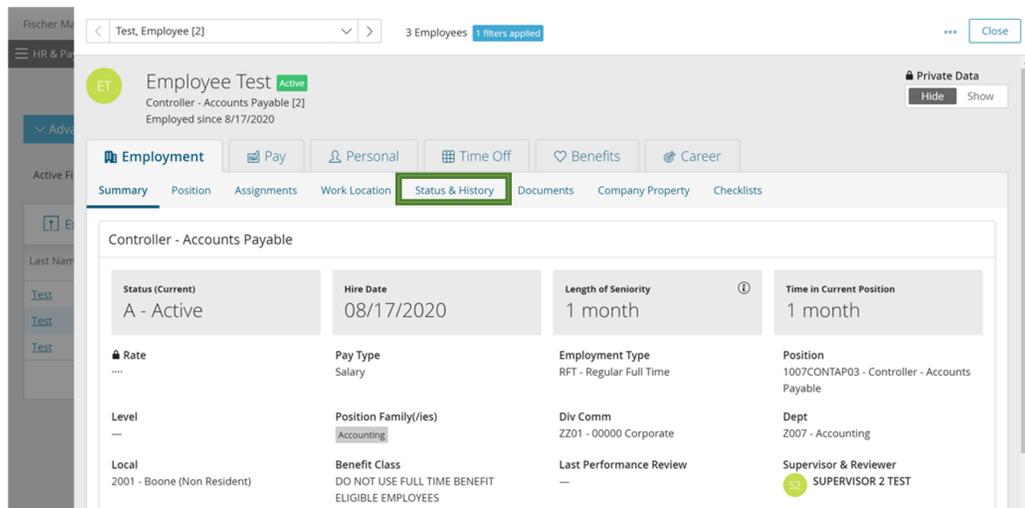
2. Select Employee Search from the list of options.



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



4. Click on the Status & History tab.



5. Click Manage Status and Seniority.

The screenshot shows the 'Employee Test' profile page. The 'Status & History' tab is selected. A red box highlights the 'Manage Status & Seniority' button. Below it, a table shows the employee's history:

Date	Category	Change Reason	Actions
2020			
08/31/2020	Compensation	—	Pay Type: Salary Annual Salary: \$---
08/17/2020	Compensation	New Hire	Pay Type: Hourly
08/17/2020	Status	New Hire	Employee Status: Active
08/17/2020	Position	—	Employment Type: RFT - Regular Full Time Position: Controller - Accounts Payable

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

The screenshot shows the 'Employee Update' form. The 'Select HR Action' dropdown menu is open, and 'Status Change Termination' is highlighted with a red box. The form also includes a 'Workflow' dropdown and a 'Select an Employee Action Form to begin' prompt.

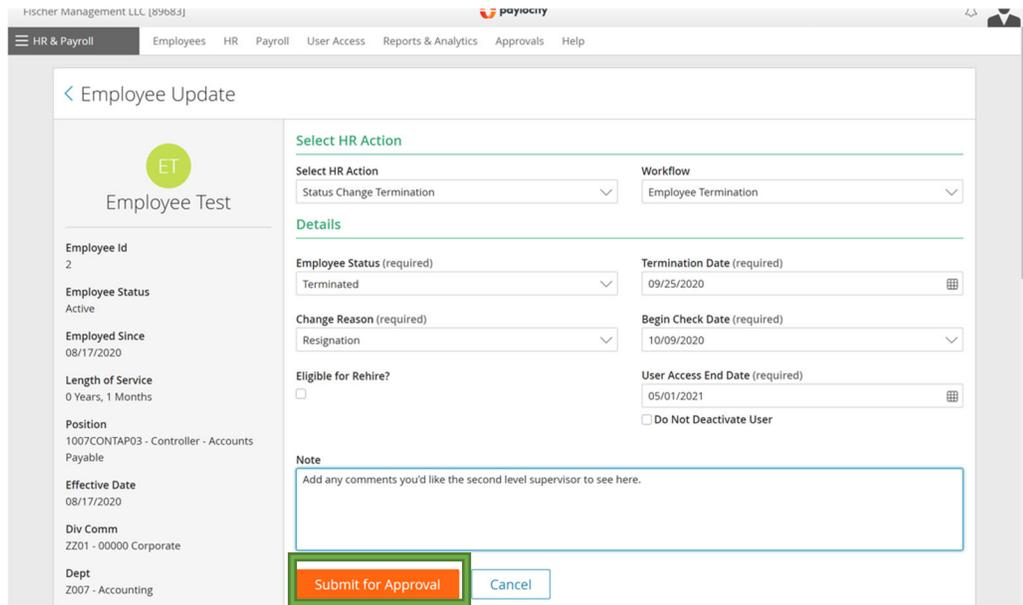
7. Change the employee status to Terminated.

The screenshot shows the 'Employee Update' form. On the left is a sidebar with employee details for 'Employee Test' (Employee ID: 2, Status: Active, Employed Since: 08/17/2020, Position: 1007CONTAP03 - Controller - Accounts Payable, Effective Date: 08/17/2020, Div Comm: ZZ01 - 00000 Corporate, Dept: 2007 - Accounting, Local: 2001 - Boone (Non Resident)). The main form has a 'Select HR Action' section with 'Status Change Termination' selected. The 'Details' section has 'Employee Status (required)' set to 'Terminated' (highlighted with a green box). Other fields include 'Termination Date (required)', 'Begin Check Date (required)', 'User Access End Date (required)', and a 'Do Not Deactivate User' checkbox. A 'Note' field is empty. At the bottom are 'Submit for Approval' and 'Cancel' buttons.

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

This screenshot shows the 'Employee Update' form with the 'Change Reason (required)' dropdown menu open. The menu lists various reasons for termination, with 'Involuntary- Attendance' selected (highlighted with a blue bar). The list includes: Involuntary- Attendance, Involuntary- Death, Involuntary- Performance, Involuntary- Reduction in Force, Involuntary- Policy Violation or Misconduct, Voluntary- Career Growth/Opportunity, Voluntary- Compensation, Voluntary- Job Abandonment, Voluntary- Lack of Fit, Voluntary- Lack of Flexibility, Voluntary- Other, Voluntary- Retirement, and Voluntary- Co-Op Completed. The 'Employee Status' is still 'Terminated'. The 'Additional Document(s)' section has a 'Select File' button. 'Submit for Approval' and 'Cancel' buttons are at the bottom.

9. Complete the remaining details and add any comments you would like to share with the 2<sup>nd</sup> 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 2<sup>nd</sup> level supervisor.



The screenshot shows the 'Employee Update' form in the Paylocity system. The form is for an employee named 'Employee Test' (Employee ID: 2). The 'Select HR Action' dropdown is set to 'Status Change Termination', and the 'Workflow' dropdown is set to 'Employee Termination'. Under the 'Details' section, the 'Employee Status' is 'Terminated', 'Termination Date' is '09/25/2020', 'Change Reason' is 'Resignation', and 'Begin Check Date' is '10/09/2020'. The 'Eligible for Rehire?' checkbox is unchecked. The 'User Access End Date' is '05/01/2021', and the 'Do Not Deactivate User' checkbox is unchecked. A 'Note' field is present with the text 'Add any comments you'd like the second level supervisor to see here.' At the bottom of the form, the 'Submit for Approval' button is highlighted with a green box, and a 'Cancel' button is also visible.