
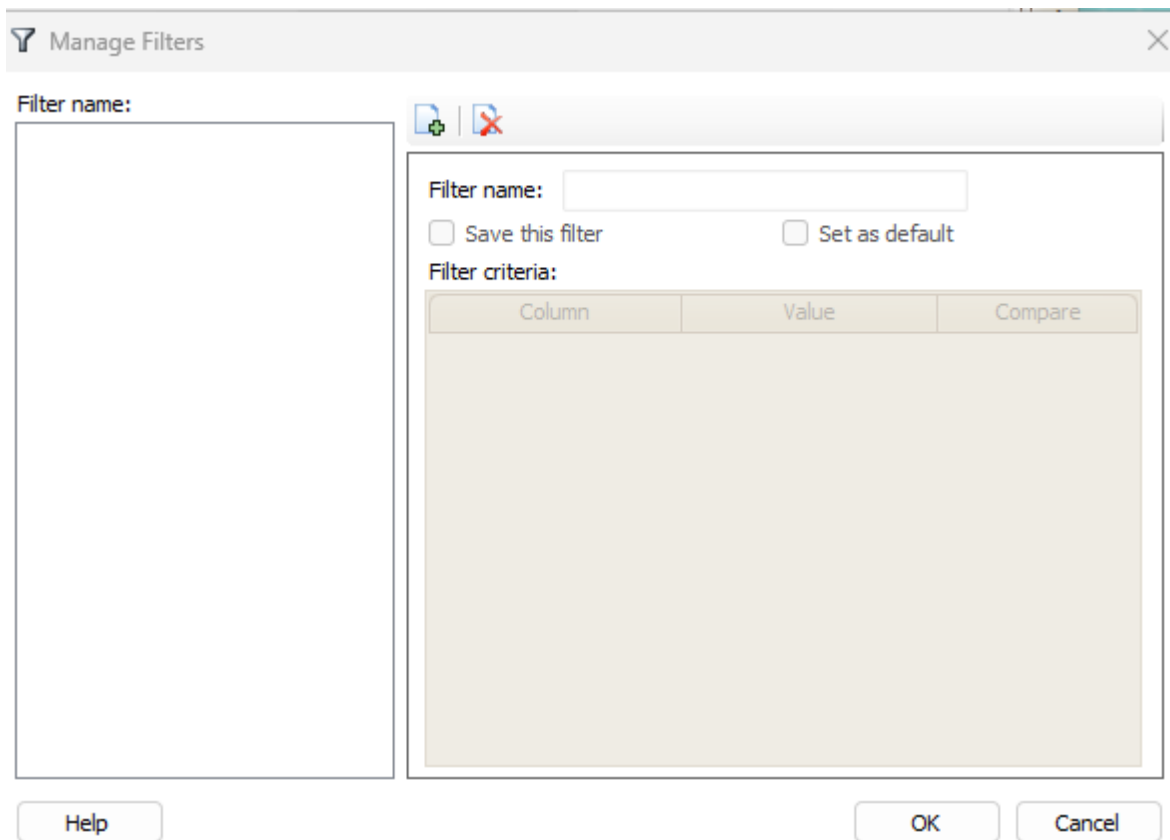


## How to Filter for Active Employees

Log into Connect. Go to Payroll – Employees – Modify Existing Employees.

Click drop down next to the filter button  in the menu at the top of the screen. Select Manage Filters.



Filter name:

☐ Save this filter ☐ Set as default

Filter criteria:

Column	Value	Compare
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Help OK Cancel

Click the New button at the top of the pop up. Name the filter (for example “Active Employees”) by typing over the blue “New Filter #” in the Filter Name field.

Double click in the blank space below Filter Criteria.

Scroll down in the Selection pop up to find Employee.TerminationDate. Double click on it or single click and use the single over arrow to select the field. Click OK.

Selection

Available criteria fields:

- Employee.I-9
- Employee.Job class
- Employee.Last name
- Employee.Maiden name
- Employee.Marital status
- Employee.Middle name
- Employee.Name
- Employee.Notes
- Employee.Payroll type
- Employee.Personal pronouns
- Employee.Receive emails
- Employee.Receive texts
- Employee.Retirement plan
- Employee.Send ACH notification email
- Employee.Social Security number
- Employee.Start date
- Employee.State/province
- Employee.Status
- Employee.Statutory
- Employee.Suffix
- Employee.Telephone 1
- Employee.Telephone 2
- Employee.Third party sick pay

Selected criteria fields:

- Employee.Termination date

Help OK Cancel

Double click on the Value "ALL" in the selection criteria across from Employee.TerminationDate.

Filter name: Active Employees

☒ Save this filter ☐ Set as default

Filter criteria:

Column	Value	Compare
Employee.Termination ...	All	Entire field

Click Operators to select {is null} and click OK. “Is Null” means blank for a number or date field.

Column: Employee.Termination date

{is null}

All | Remove Last | Clear Values | Operators ▾

Enter value:  ▾

Add Value Range End

Help OK Cancel

Click OK in the Manage Filters Screen. And click “Yes, and save them for the entire organization” (top option) to save the filter.

Manage Filters

Filter name: Active Employees

Filter name: Active Employees

Save Options

Would you like to save these options permanently?

☒ Yes, and save them for the entire organization

☐ Yes, but save them for me only

☐ No, do not save them permanently

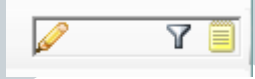
Cancel

Compare

Entire field

Help OK Cancel

To activate the filter, click on the filter icon in the menu. You will be able to see that it is filtering your employees by seeing that the filter icon is highlighted AND shows on the right side of the screen



To set a default of having the filter turned on/active, click the drop down by the filter in the menu. Select Manage Filters. Select the Active Employees filter (it will be highlighted) and check the box on the upper right of the pop up for “Set as default”. Click OK in the Manage Filters Screen. And click “Yes, and save them for the entire organization” (top option) to save the filter.

This filter is only created in the menu you are in (for example Modify Existing Employees). You can also create this in the Employee Inquiry screen by following the same steps when you are in the Employee Inquiry screen.