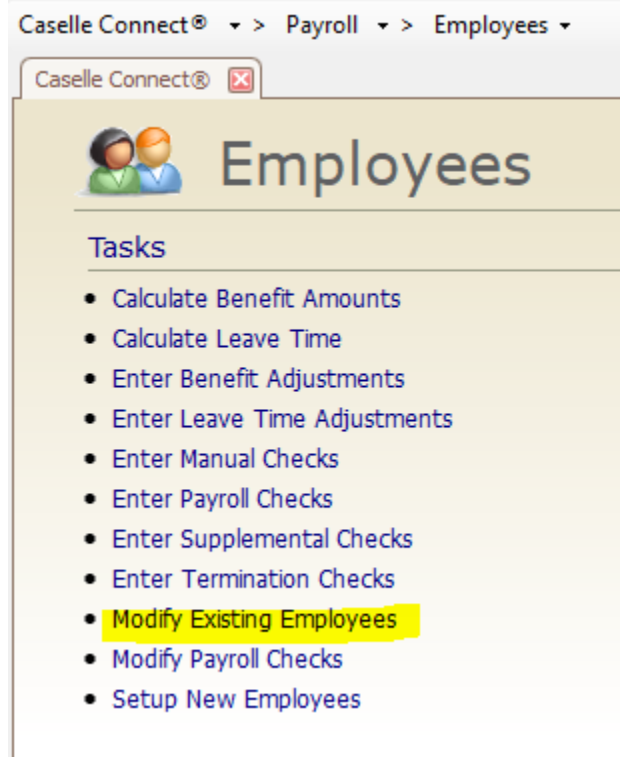


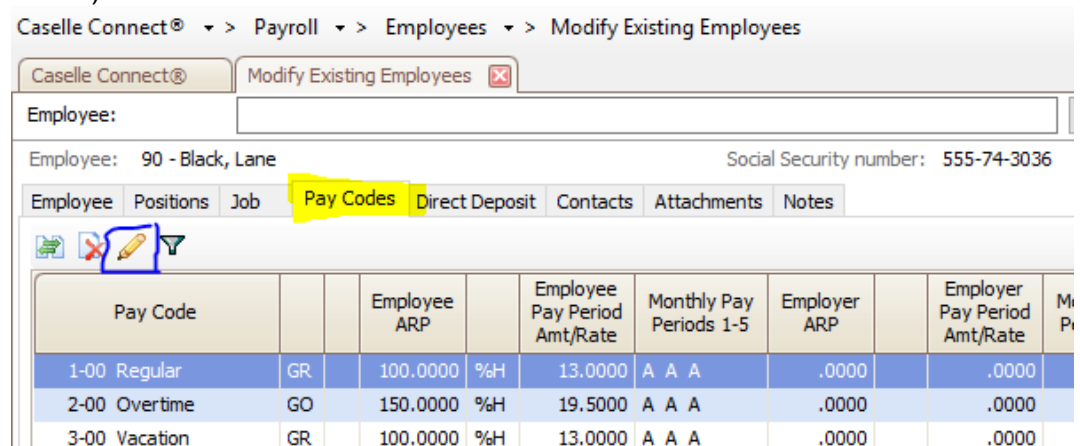
Terminating an Employee & Status Change

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

Standard hours: 80.00

Exemptions: 0

Additional exemptions: 0

Begin date: [Calendar]

End date: [Calendar]

☐ Exclude hours

Monthly period numbers

1	2	3	4	5
A	A	A		

- b. Stop accrual of leave balances

- While still on the pay code tab of the employee record, select the first leave pay code assigned to the employee
- Click the pencil to edit (if not already in edit view)
- 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 Level
Vacation - Percentage (302)	Vacation - 6+ years (2)

Leave Rate

Leave rate: Vacation - Percentage (302)

Leave level: Vacation - 6+ years (2)

Next level date: [Calendar]

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

Leave Rate

Leave rate: Vacation - Percentage (302)

Leave level: Vacation - 6+ years (2)

Next level date: [Calendar]

Pay code leave: 105.36

☒ Stop leave time accrual

screen)

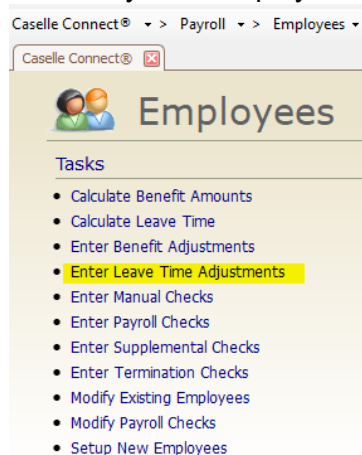
- v. Repeat for each leave time pay code assigned to the employee

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



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

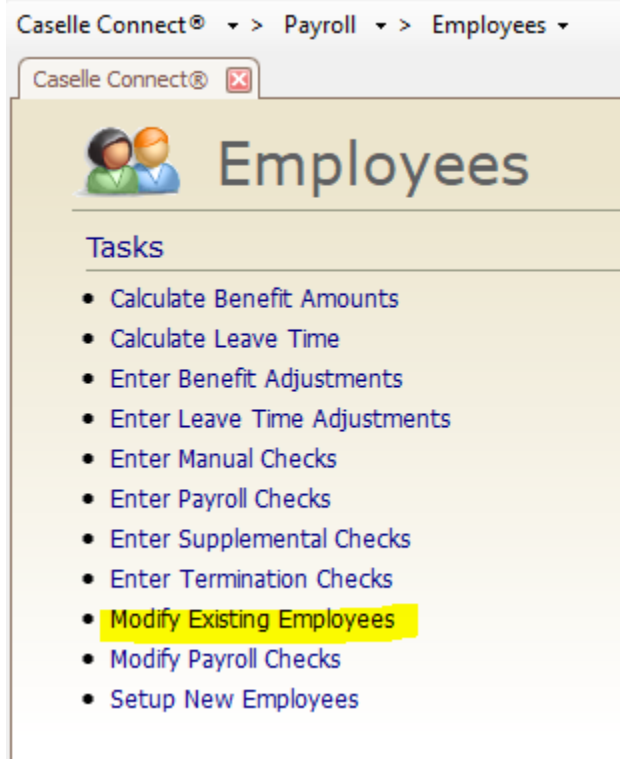


- iii. Enter the employee (name or number), the leave time pay code and the hours as a negative amount to remove any remaining balances

The screenshot shows the 'Enter Leave Time Adjustments' form in the Caselle Connect® system. The breadcrumb trail is 'Caselle Connect® > Payroll > Employees > Enter Leave Time Adjustments'. The form includes the following fields: 'Current pay period: 12/27/2018 - 1/9/2019', 'Period number: 2', 'Reference number: 1', 'Employee: [dropdown]', 'Pay code: [dropdown]', and 'Hours: 0'. There is also a section for 'Leave transactions' with a table that has columns for 'Reference Number', 'Employee Number', 'Name', and '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

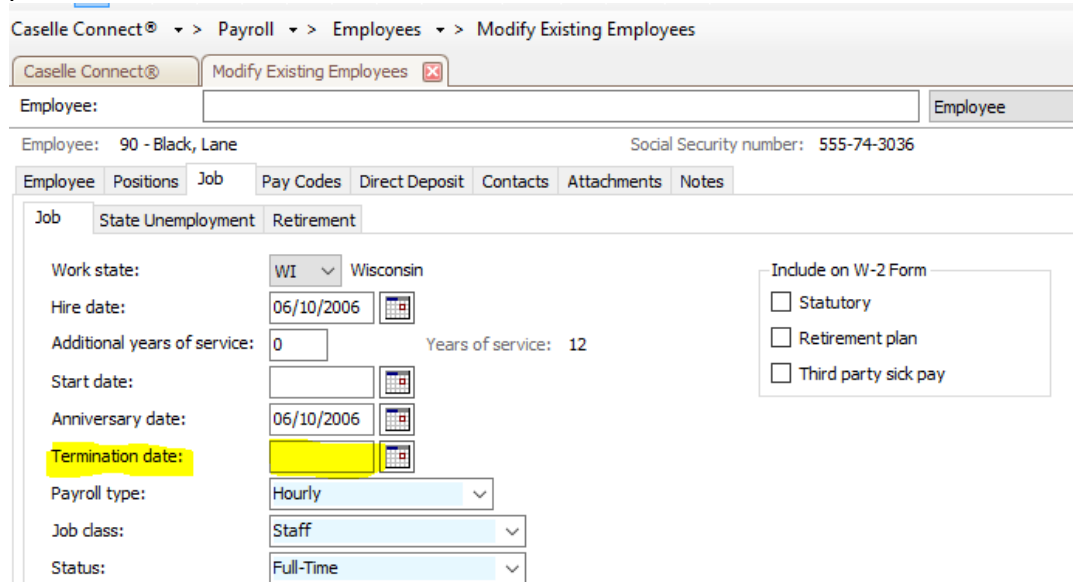
Caselle Connect®

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). Do NOT enter a termination date on the position tab unless the employee is still employed but changing positions.



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: [Redacted]

- 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: [Redacted] Change...

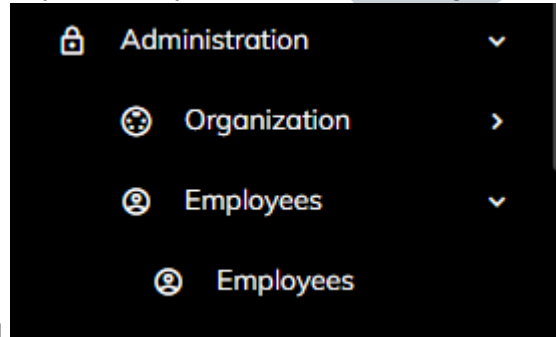
☐ Require user to change their password at login

☐ **Activate user** ☒ **Lock login**

☐ Notify user if program updates are available

7nom

4. Change employee status in miPayOnline to Read Only and remove any standard entries
- Log into your miPayOnline account and go to the Administration – Employee



Menu

- Select the terminated employee , note the time entry template

Name	Time Entry Template
<input type="text"/>	(All)
Lindbergh, Charles	Water

- Go to Administration – Time Setup – Time Entry Template.
- Select the template and make sure the payroll group can enter for the template.

Group who can enter time for template members

Water

- Click Time – Time Entry
- Click the Set Standard Entry button
- Check the box to the left of the standar entry lines and click “Delete Rows” and

<input type="checkbox"/>	Task	M
<input type="checkbox"/>	Regular	

click Save.

- Go to Administration – Employees – Employees.
- Select the terminated employee , click on the employee name (single click)

E. Name

35 Slade, Randy L

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


Edit Employee

Standard Pay Period Hours

0

Time Entry Days

Time Off Calendar Color

 #184D5D

Other

☐ Site Administrator

☐ Read Only

Templates

Time Off Template

Jacob Smith Template

Time Entry Template

Work Days Of Week

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
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SAVE

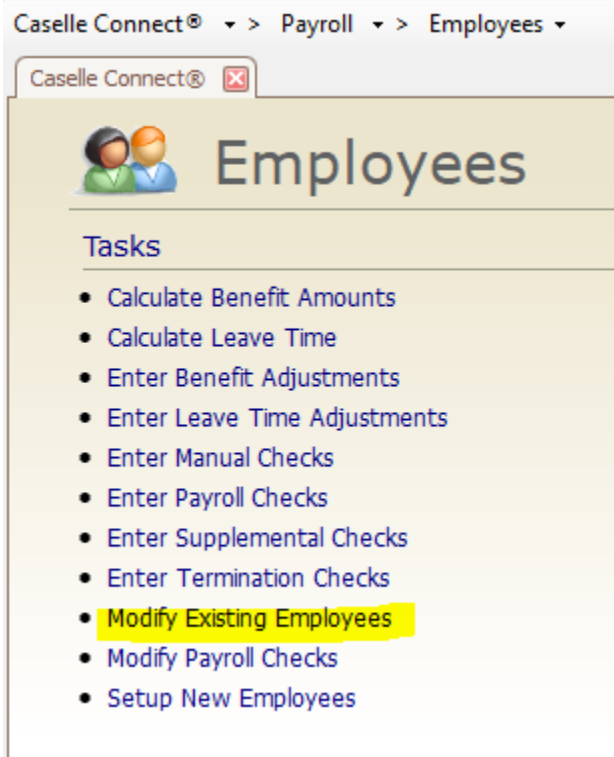
CANCEL

REMOVE EMPLOYEE ACCESS

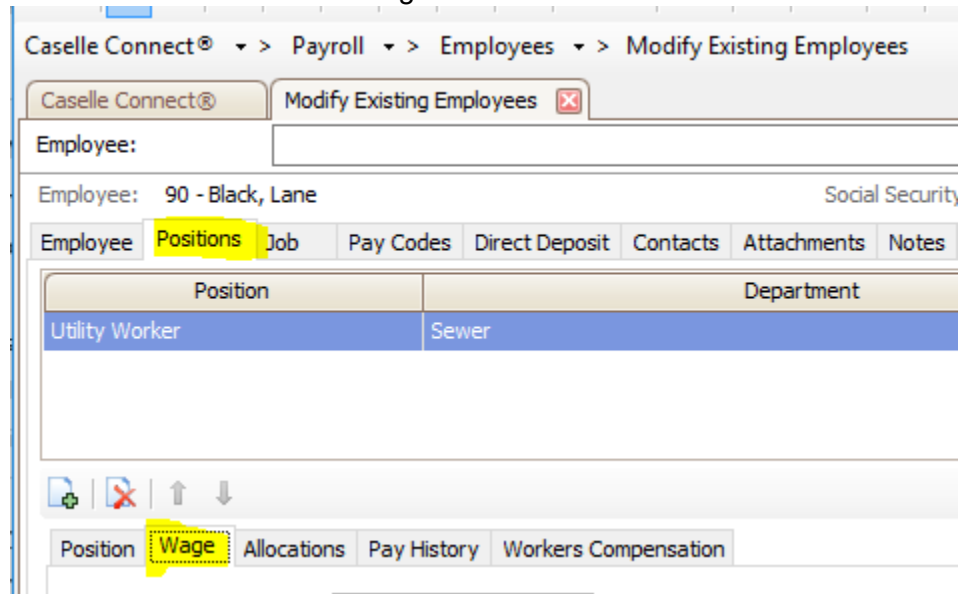
- k. Remove Time Off and Time Entry templates.
5. Change the employee password in miViewPoint
 6. Notify support@civicsystems.com that the employee is no longer active for support/remote hosting.

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

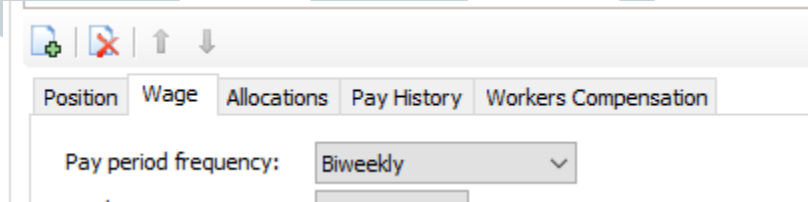
1. Change in employee pay frequency.
 - a. Go to Payroll – Employees – Modify Existing Employees



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



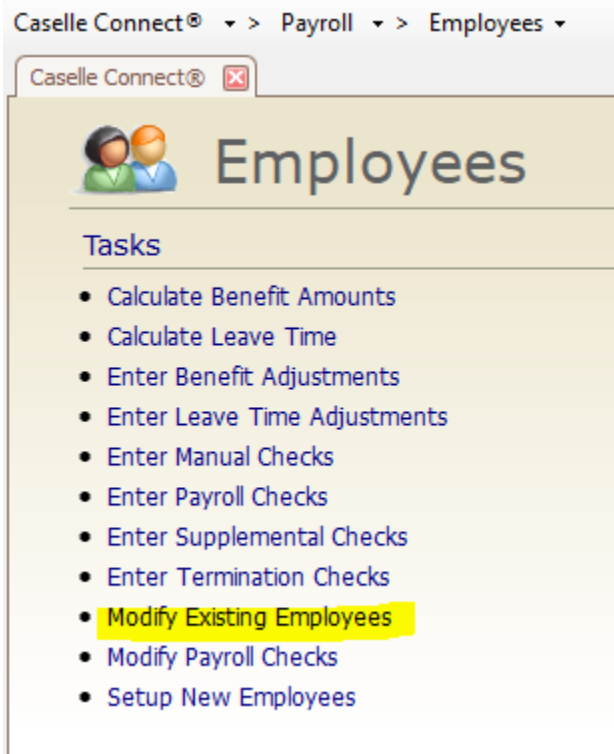
- d. Change the Pay Period Frequency to the new appropriate frequency. This is very important as it controls the tax calculation for the employee



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. Under the 'Wage' tab, there is a label 'Pay period frequency:' followed by a dropdown menu that is set to 'Biweekly'.

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 with a breadcrumb trail: '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: 02-22600

Allocation method: Use transactions

Calculation:

Modifier: 100.00

Begin date:

End date:

☐ Calculate on unpaid employee

Monthly period numbers

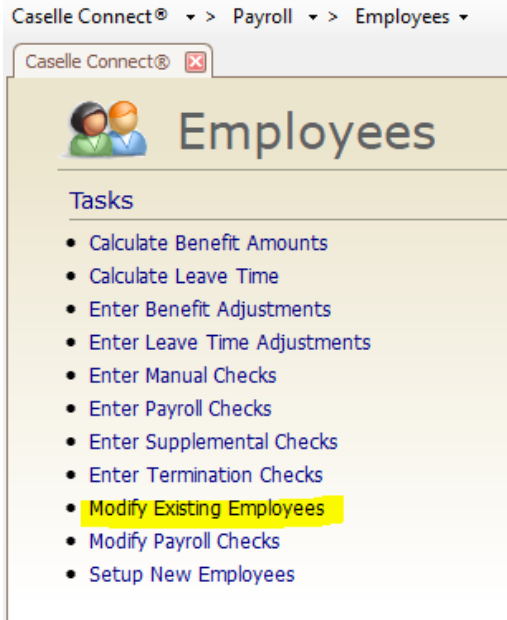
1 2 3 4 5

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



- 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

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

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.