

## Archdiocese Termination Process

Status Change Forms (SFC) should be completed, and the appropriate signature secured from the authorized person (pastor, principal) for all terminations. Bookkeepers are to process the status change requests directly in Paylocity.

Once bookkeepers make the change(s) in Paylocity, they must also upload the completed/signed SFC form supporting the change and submit the request. Paylocity will alert the Human Resources department to review the request and approve for processing.

The process for Terminations consists of: (1) Pay out the last paycheck including any vacation accrued (ministry agreement payouts are different) (2) Zeroing and ending the Time Off Accrual, (3) Terminating them in Paylocity so they no longer appear active.

Once a status change form for termination has been signed off by the appropriate authorizer, the following steps must be completed in Paylocity:

### (1) Pay out of the last paycheck

- Pay how much they worked during that pay period (if applicable)
  - including both premiums (if beginning of the month) or the last insurance premium (if end of the month)
    - Per the Affordable Care Act, we must take all insurance premiums that month as we have to give the employee to the end of the month to find new benefits.
- Pay out their remaining vacation

### Vacation Pay Out

- Navigate to HR & Payroll > Employees > Employee Search > Employee Name > Time Off
- Select Setup > Click on edit icon on vacation type line

Management interface showing Time Off Setup options: Employment, Pay, Personal, Time Off, Benefits, Career. Sub-menu: Balance, History, Leave, Setup. Action: Manage Time Off Setup. Hours Worked Per Day: 8.00. Section: Time Off Types.

Type ^	Accrual Rate	Max Balance	Max Carry Over	Start Date	Accrue End Date	Actions
LYS75 - LAY SICK 7.5 HOURS	3.461500	0.00	675.00	01/01/2018	—	
LYV75 - LAY VACATION 7.5 HOURS	5.769200	0.00	150.00	01/01/2018	—	

- Note available balance and accrual rate

### Accrue Ongoing

Enabled

Hours Worked   Override?

Accrual Rate  Hours  Override?

Max Balance  Hours  Override?

Time off accrues : Bi-Weekly

### Clear and Transfer Balances

Enabled

Max Carry Over  Hours  Override?

Available balance above carry over max is cleared on Emp Anniversary Date.  
Used balance is reset to zero when available balance is cleared.

### Current Balance

Available	92.39 Hours	Dollars Available	0.00
Used	7.50 Hours	Dollars Used	0.00
<b>Total</b>	<b>99.89 Hours</b>	<b>Dollars Total</b>	<b>0.00</b>

### Manual Adjustment

	Starting Hours	Change	Adjusted Hours	Starting Dollars	Change	Adjusted Dollars
Available	92.39	<input type="text" value="92.39"/>	92.39	0.00	<input type="text" value="0.00"/>	0.00
Used	7.50	<input type="text" value="7.50"/>	7.50	0.00	<input type="text" value="0.00"/>	0.00
<b>Total</b>	<b>99.89</b>	<b>99.89</b>	<b>99.89</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Termination date 10/08/2020

Notes

Save Cancel

### • Calculate Vacation Pay Out

Vacation pay out is the available balance at termination date plus accrual incurred in final pay period. NOTE: Time off balances are updated each pay date.

Add accrual rate to available balance if employee worked entire pay period

Example:

Available Balance 92.39 + accrual rate 5.796 = vacation pay out **98.19**

If employee did not work entire final pay period, calculate partial accrual rate and add to balance

Example:

Pay Period - 10/03/2020 – 10/16/2020

Termination date – 10/08/2020 (4 days in final pay period)

Vacation pay out would be 92.39 + 2.32 (5.769/10 x 4 days worked in period = 2.32) = **94.71 hours**

- Create payroll batch
- Select EVAC-VACATION earnings code and enter vacation balance pay out hours in the Hours Column and click on SAVE button

Check Detail

Auto Pay  0.00 Hours Check Type Regular Override C

Line Items

Setup

Earn/Ded/Tax	Hours	Amount	Rate Code	Rate	Location	Department	Office	Action
EREG - REGULAR	30.0000	0.00	-- Select --	0.0000	-- Select --	-- Select --	-- Select --	Delete
EVAC - VACATION	94.7100	0.00	-- Select --	0.0000	-- Select --	-- Select --	-- Select --	Delete
ESICK - SICK	0.0000	0.00	-- Select --	0.0000	-- Select --	-- Select --	-- Select --	Delete
EVAC - VACATION	0.0000	0.00	-- Select --	0.0000	-- Select --	-- Select --	-- Select --	Delete
EHOLM - HOLIDAY - MEMC	0.0000	0.00	-- Select --	0.0000	-- Select --	-- Select --	-- Select --	Delete
-- Select --	0	0	-- Select --	0	-- Select --	-- Select --	-- Select --	Delete
<b>EARNING TOTALS:</b>	124.7100	0						

Save Save & Add New Check Delete Check View Check Details Go to Company Set Payroll

Batch Totals Calculate An Additional Check

HINT: you may also navigate directly to Time off Balances from payroll grid by opening payroll batch created > click on employee name > click on LYVXX balance

Avail Hours - Dollars

LYS75 19.65 - \$256.68  
 LYV75 31.04 - \$405.32  
 (N/A)  
 (N/A)

Cost Center

Location 9400  
 Department 330  
 Office 1742

You will land in HR & Payroll > Setup and Balance to view accrual rate and balance for vacation time off calculation

Personal Work Payroll Setup Pay **Time Off** Schedules Time & Labor Custom Integration

Balances Time Off History

Setup & Balance

Hours Per Work Day 8.0000  Override?

Save

Time Off Types

Type	Start Date	Used Hours / Days	Available Hours / Days	Used \$	Available \$	Length Of Service
<input type="checkbox"/> LYS75 - LAY SICK 7.5 HOURS	05/29/2018	14.96 Hours	19.65 Hours	\$0.00	\$0.00	05/29/2018
<input type="checkbox"/> LYV75 - LAY VACATION 7.5 HOURS	05/29/2018	15.12 Hours	31.04 Hours	\$0.00	\$0.00	05/29/2018

Add Delete Return To Payroll

\* The following steps may change depending on new HR processes.

Setup & Balance Details

• Time Off Type    
• Start Date    
Accrue End Date

Length of Service Date   Override?   
Months of Service 28.88 as of 10/23/2020

Accrue Ongoing

Enabled    
Hours Worked   Override?   
Accrual Rate  Hours  Override?   
Max Balance  Hours  Override?   
Time off accrues : Bi-Weekly

Clear and Transfer Balances

Enabled    
Max Carry Over  Hours  Override?   
Available balance above carry over max is cleared on Emp Anniversary Date.   
Used balance is reset to zero when available balance is cleared.

Current Balance

Available	31.04 Hours	Dollars Available	0.00
Used	15.12 Hours	Dollars Used	0.00
<b>Total</b>	<b>46.16 Hours</b>	<b>Dollars Total</b>	<b>0.00</b>

Manual Adjustment

	Starting Hours	Change	Adjusted Hours		Starting Dollars	Change	Adjusted Dollars
Available	31.04		<input type="text" value="31.04"/>	Available	0.00		<input type="text" value="0.00"/>
Used	15.12		<input type="text" value="15.12"/>	Used	0.00		<input type="text" value="0.00"/>
<b>Total</b>	<b>46.16</b>	<b>46.16</b>		<b>Total</b>	<b>0.00</b>	<b>0.00</b>	

(2) Zeroing and ending the Time Off Accrual

- Navigate to the HR & Payroll > Employees > Employee Search > Employee Last Name > Time Off tab

The screenshot shows the HR system interface. At the top, there is a navigation bar with tabs for Employment, Pay, Personal, Time Off (circled in red), Benefits, and Career. Below this is a sub-navigation bar with tabs for Balance, History, Leave, and Setup. The main content area is titled 'Time Off Available' and displays two cards. The first card is for 'LYS75 - LAY SICK 7.5 HOURS' with a balance of 48.46 hrs. The second card is for 'LYV75 - LAY VACATION 7.5 HOURS' with a balance of 48.46 hrs. Each card has an edit icon (pencil) in the top right corner.

- Select Setup > click on Edit icon under Actions

Employment Pay Personal **Time Off** Benefits Career

Balance History Leave **Setup**

Manage Time Off Setup

Hours Worked Per Day  
8.00

**Time Off Types**

Type ^	Accrual Rate	Max Balance	Max Carry Over	Start Date	Accrue End Date	Actions
✓ LYS75 - LAY SICK 7.5 HOURS	3.461500	0.00	675.00	03/30/2020	—	
✓ LYV75 - LAY VACATION 7.5 HOURS	3.461500	0.00	150.00	03/30/2020	—	

- Under Setup & Balance enter a termination date under Accrue End Date

**Setup & Balance Details**

• Time Off Type LYS75 - LAY SICK 7.5 HOURS

• Start Date 3/30/2020

Accrue End Date

- Under Manual Adjustment > Available enter (0) Zero

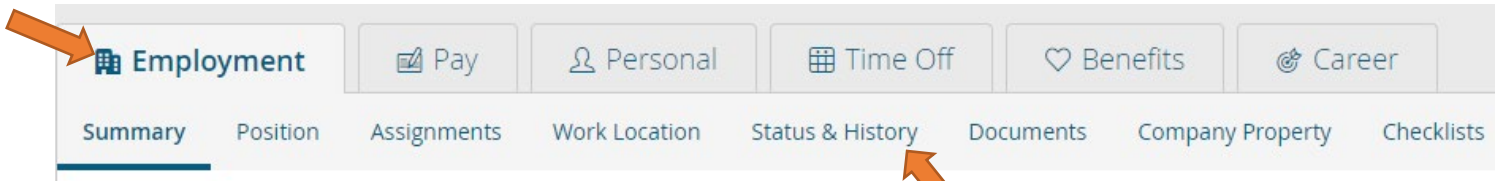
**Manual Adjustment**

	Starting Hours	Change	Adjusted Hours
Available	48.46		48.46
Used	0.00		0.00
<b>Total</b>	<b>48.46</b>		<b>48.46</b>
Notes			

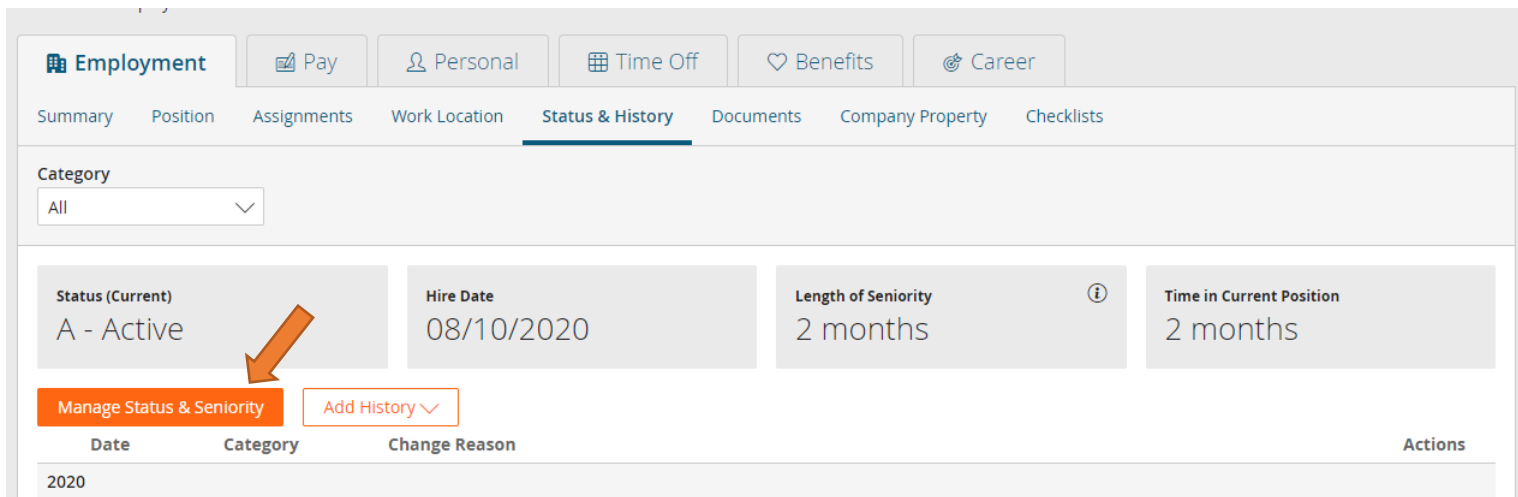
- Note the reason for adjustment (i.e. Termination, transfer etc)
- Save

### (3) Terminating them in Paylocity so they no longer appear active

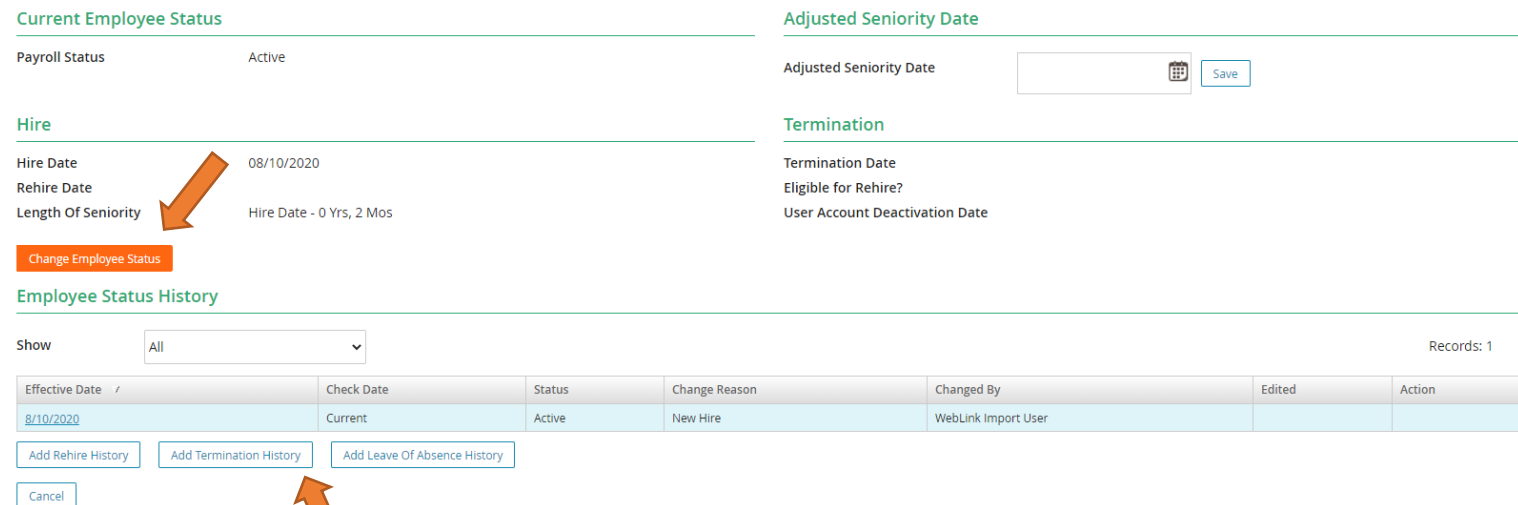
- Navigate to the HR & Payroll > Employees > Employee Search > Employee Last Name > Employment Tab > Status and History Sub Tab



- Manage Status and Seniority (big orange button)



- Click **Either** “Change Employee Status” or “Add Termination History”
  - If you click “Change Employee Status,” you have to choose the Termination Workflow
    - Select HR Action: Status Change Termination > Workflow: Employee Termination



\* The following steps may change depending on new HR processes.

## Select HR Action

Select HR Action

Status Change Termination

Workflow

Employee Termination Corrective

### Details

Employee Status (required)

Termination Date (required)

Change Reason (required)

Begin Check Date

Eligible for Rehire?

User Access End Date (required)

Do Not Deactivate User

Note

Save

Submit for Approval

Cancel

- Input the correct information
  - Employee Status: Terminated
  - Change Reason: (dependent upon the situation)
  - Eligible for Rehire?: Please always choose
    - Check box for yes
    - Leave box unchecked for no
  - Termination date
  - **\*\*BEGIN CHECK DATE\*\* = Most important aspect to remember**
    - This will always be the pay period after their last check
      - **Example** (picture on next page)
        - If someone terms within 10/31/2020-11/13/2020
          - Put their termination date (ex: 11/05/2020)
          - Their next paycheck would be 11/20/2020
          - BUT their “Begin Check Date” would be 12/04/2020
            - This way they show up on the grid on 11/20/2020 and get paid
            - If you had put 11/20/2020 as the “Begin Check Date,” they would not automatically show up on the grid, you would have to manually pull them up on the Payroll grid

10/31/2020 - 11/13/2020	November 13, 2020	November 20, 2020
11/14/2020 - 11/27/2020	November 27, 2020	December 4, 2020
11/28/2020 - 12/11/2020	December 11, 2020	December 18, 2020
12/12/2020 - 12/25/2020	December 25, 2020	December 31, 2020*
12/26/2020 - 1/8/2021	January 8, 2021	January 15, 2021

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- User Access End Date: Always choose the following week
  - Please always deactivate them so their account is no longer enabled and they cannot get into it
    - \*If they need something go forward (last pay stub, etc.) have them contact HR at 210-734-2620
- Click “Save” or “Submit for Approval” at the Bottom