

STEPS TO KEY YOUR TERMINATIONS IN PAYLOCITY

- Log in to Paylocity
- Click on “HR & Payroll” on the left scroll bar
- Click on “Employees” and then click “Employee HR File”
- Select your employee through the search field in the upper right of the screen

The screenshot displays the Paylocity HR & Payroll interface. The top navigation bar includes 'HR & Payroll', 'Employees', 'HR', 'Payroll', 'User Access', 'Reports & Analytics', 'Document Library', 'Approvals', 'Tax & Finance', and 'Configuration'. Below this, a search bar contains the name 'Abarca Michelle [200001876] (6...' and a 'Filter' button set to 'Active'. The main content area is divided into several tabs: 'Personal', 'Work', 'Employment', 'Pay', 'Benefits', 'Performance', 'Training', 'Time Off', 'Custom', and 'Integration'. The 'Work' tab is active, and within it, the 'Employee Status' sub-tab is selected. The 'Current Employee Status' section shows 'Payroll Status' as 'Active'. The 'Adjusted Seniority Date' section has a date input field and a 'Save' button. The 'Hire' section shows 'Hire Date' as '06/09/2021', 'Rehire Date' as blank, and 'Length Of Seniority' as 'Hire Date - 1 Yrs, 9 Mos'. The 'Termination' section includes fields for 'Termination Date', 'Eligible for Rehire?', and 'User Account Deactivation Date'. An orange 'Change Employee Status' button is highlighted at the bottom left of the 'Current Employee Status' section.

- Click on “Work” tab
- Click on “Employee Status”
- Click on orange “Change Employee Status” button
- Select HR Action from the drop down “Status Change Termination”; Workflow will default to “Employee Termination Request”
- Select “Terminated” in Employee Status field
- Select Termination date (this should be their last day worked)
- Select the “Change Reason” (termination reason that BEST describes the reason for the termination)
- Select the next check date in the Begin Check Date field (it will default to the next one)
- Check the box if someone IS eligible for rehire; if they are not leave the check box empty
- Select 1 month from the term date in the User Access End Date field
- Write any notes you feel are relevant to the separation. Please be mindful that anything written can be subpoenaed and viewed by others, thus the expectation is that anything written in here is professional and factual.
- Click orange “Submit for Approval” button. This approval submits to HR for processing.

Select HR Action

Select HR Action

Status Change Termination

Workflow

Employee Termination Request

Details

Employee Status (required)

Terminated

Termination Date (required)

03/23/2023

Change Reason (required) ⓘ

Job Abandonment 2cons

Begin Check Date (required)

04/07/2023 - Bi-Weekly

Eligible for Rehire?

User Access End Date (required)

05/01/2024

Do Not Deactivate User

Note

Additional Document(s)

Add document ⓘ

Select File

Save

Submit for Approval

Cancel