

# Paylocity Termination: Teacher (10-month Contract)

## Overview

When a 10-month teacher's employment ends, specific steps need to be followed to terminate salary payments and benefit coverages accurately. The termination is processed in Paylocity by the parish administrator at the school where the teacher is employed.

## Policy Summary

Teachers who are on a contract and work 10 months in a calendar year have benefit coverages from September 1 through August 31.

## Terminating Employment

1. Log in: <https://login.paylocity.com>
2. Type employee last name in Employee Search box
3. Press 'Search'.

The screenshot shows the Paylocity HR & Payroll interface for the Diocese of Kansas City-St. Joseph. The search bar contains 'ztest' and the 'Search' button is highlighted with a red box. Below the search bar, there are active filters and a table of search results.

Diocese of Kansas City-St. Joseph [N9142] paylocity Quick Nav Company Id

HR & Payroll Employees HR Payroll User Access Reports & Analytics Approvals Tax & Finance Configuration Help

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Advanced  -- All --  Reset -- Saved Search --

Active Filters:  Quick Search: ztest

1 - 2 of 2 Items

| <input type="checkbox"/> | Last Name ▲ | Preferred / First Name | Emp Id | Status | Supervisor [Id]            | Location            | Serv Area      | Office                 | Actions  |
|--------------------------|-------------|------------------------|--------|--------|----------------------------|---------------------|----------------|------------------------|--|
| <input type="checkbox"/> | ZTEST       | Ginger                 | 8926   | I      | Hoppins, Carol Anne [8909] | Our Lady of Lourdes | Finance & Mgmt | Office Staff           | <input type="button" value="Info"/> <input type="button" value="Print"/> |
| <input type="checkbox"/> | ZTEST       | TEE                    | 2      | T      | Hoppins, Carol Anne [8909] | Chancery Offices    | Finance & Mgmt | Human Resources Office | <input type="button" value="Info"/> <input type="button" value="Print"/> |

Delete Selected 1 - 2 of 2 Items

#### 4. Select Employee

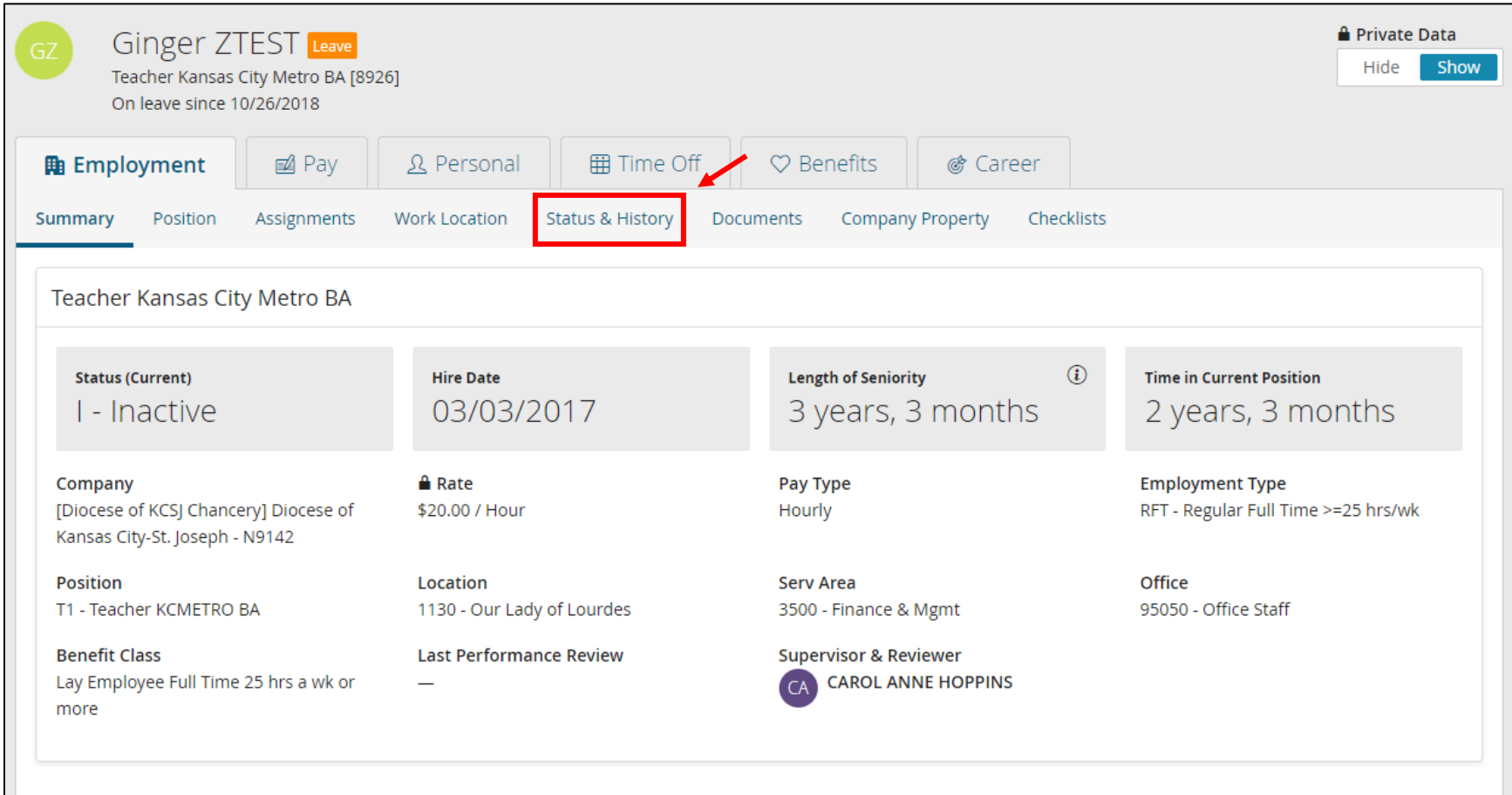
- Click Last Name

The screenshot shows the Paylocity HR & Payroll interface for the Diocese of Kansas City-St. Joseph. The search results table is as follows:

| <input type="checkbox"/> | Last Name | Preferred / First Name | Emp Id | Status | Supervisor [Id]            | Location            | Serv Area      | Office                 | Actions |
|--------------------------|-----------|------------------------|--------|--------|----------------------------|---------------------|----------------|------------------------|---------|
| <input type="checkbox"/> | ZTEST     | Ginger                 | 8926   | I      | Hoppins, Carol Anne [8909] | Our Lady of Lourdes | Finance & Mgmt | Office Staff           |         |
| <input type="checkbox"/> | ZTEST     | TEE                    | 2      | T      | Hoppins, Carol Anne [8909] | Chancery Offices    | Finance & Mgmt | Human Resources Office |         |

Navigation controls at the bottom of the table include a 'Delete Selected' button and pagination for '1 - 2 of 2 items'.

5. On the 'Employment' tab, click 'Status and History':




**Ginger ZTEST** Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

**Private Data**  
Hide Show

**Employment** Pay Personal Time Off Benefits Career

Summary Position Assignments Work Location **Status & History** Documents Company Property Checklists

Teacher Kansas City Metro BA

|  |   |  |   |
|--|---|--|---|
| <b>Status (Current)</b><br>I - Inactive  | <b>Hire Date</b><br>03/03/2017                | <b>Length of Seniority</b> ⓘ<br>3 years, 3 months  | <b>Time in Current Position</b><br>2 years, 3 months          |
| <b>Company</b><br>[Diocese of KCS] Chancery] Diocese of Kansas City-St. Joseph - N9142 | <b>Rate</b><br>\$20.00 / Hour                 | <b>Pay Type</b><br>Hourly  | <b>Employment Type</b><br>RFT - Regular Full Time >=25 hrs/wk |
| <b>Position</b><br>T1 - Teacher KCMETRO BA   | <b>Location</b><br>1130 - Our Lady of Lourdes | <b>Serv Area</b><br>3500 - Finance & Mgmt  | <b>Office</b><br>95050 - Office Staff                         |
| <b>Benefit Class</b><br>Lay Employee Full Time 25 hrs a wk or more                     | <b>Last Performance Review</b><br>—           | <b>Supervisor &amp; Reviewer</b><br> CAROL ANNE HOPPINS |   |

6. Click the orange 'Manage Status & Seniority' button.

**GZ** Ginger ZTEST Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

Private Data  
Hide Show

Employment Pay Personal Time Off Benefits Career

Summary Position Assignments Work Location **Status & History** Documents Company Property Checklists

Category  
All

Status (Current)  
I - Inactive

Hire Date  
03/03/2017

Length of Seniority  
3 years, 3 months


Time in Current Position  
2 years, 3 months

**Manage Status & Seniority** Add History

| Date         | Category | Change Reason        | Actions   |
|--------------|----------|----------------------|---|
| 2018         |          |                      |   |
| ✓ 10/26/2018 | Status   | Inactive-Admin Leave | Employee Status: Inactive   |
| ✓ 03/06/2018 | Position | Change Supervisor    | Employment Type: RFT - Regular Full Time >=25 hrs/wk Position: Teacher Kansas City Metro BA |

7. Click 'Terminate'.

< Manage Status & Seniority




**GZ** Ginger ZTEST Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

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### Current Employee Status

Payroll Status: Inactive

### Adjusted Seniority Date

Adjusted Seniority Date:  

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### Hire

Hire Date: 03/03/2017  
Rehire Date:  
Length Of Seniority: Hire Date - 3 Yrs, 3 Mos

### Termination

Termination Date  
Eligible for Rehire?  
User Account  
Deactivation Date

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### Employee Status History

8. Enter termination details. (All fields highlighted in green are required).

- Click 'Save'.

**Recommendation:** Enter April 15 of the following year as the 'User Account Deactivation Date' so the employee has access to paystubs and W-2's.

The screenshot displays the Paylocity HR system interface for the Diocese of Kansas City-St. Joseph. The 'Termination Details' form is the central focus, with several fields highlighted in green to indicate they are required. The 'Save' button is highlighted in yellow. A red arrow points to the 'User Account Deactivation Date' field, which is currently set to 6/14/2017.

**Termination Details Form Fields:**

- Employee Status: Terminated
- Termination Date: 6/14/2017
- Begin Check Date: 06/30/2017
- Change Reason: -- Select --
- Eligible for Rehire?:
- User Account Deactivation Date: 6/14/2017

**Employee Status History Table:**

| Effective Date | Check Date | Status | Change Reason | Changed By | Edited | Action |
|----------------|------------|--------|---------------|------------|--------|--------|
| 4/8/2016       | Current    | Active | New Hire      | Tjames     |        |        |

# Terminating Benefits

1. Click the 'Personal' tab.

**Ginger ZTEST** Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

**Private Data**  
Hide Show

**Employment** Pay **Personal** Time Off Benefits Career

Summary Position Assignments Work Location **Status & History** Documents Company Property Checklists

Category: All

**Status (Current)**: I - Inactive  
**Hire Date**: 03/03/2017  
**Length of Seniority**: 3 years, 3 months  
**Time in Current Position**: 2 years, 3 months

**Manage Status & Seniority** **Add History**

| Date | Category | Change Reason | Actions |
|------|----------|---------------|---------|
| 2018 |          |               |         |

2. Click 'Additional Fields'.

**GZ** Ginger ZTEST Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

Private Data  
Hide Show

Employment Pay **Personal** Time Off Benefits Career

Contact Access **Additional Fields** Confidential

Edit Contact

Full Legal Name (First Middle Last)  
Ginger Alice ZTEST

|   |                |                 |                      |
|---|----------------|-----------------|----------------------|
| Preferred First Name                        | Salutation     | Suffix          | Prior Last Name      |
| —   | —              | —               | —                    |
| Home Address                                | Home Phone     | Personal Mobile | Personal Email       |
| 10 Mountain Dr.<br>Kearney, MO 64060<br>USA | (816) 781-1123 | —               | lehr@diocesekcsj.org |

Emergency Contacts

Add Emergency Contact

3. Click 'Edit Additional Fields'.

**GZ** Ginger ZTEST Leave  
Teacher Kansas City Metro BA [8926]  
On leave since 10/26/2018

Private Data  
Hide Show

Employment Pay **Personal** Time Off Benefits Career

Contact Access **Additional Fields** Confidential

### HR & Payroll Custom Fields

Current Assignments

^ [Diocese of KCS] Chancery] Diocese of Kansas City-St. Joseph - N9142

**Edit Additional Fields**

|                             |                      |                                |   |
|-----------------------------|----------------------|--------------------------------|---|
| Shared Employee<br>No       | Shared Location<br>- | Benefit Deduction Months<br>12 | Benefit_Custom1<br>-  |
| Benefit_Custom2<br>-        | Benefit_Custom3<br>- | Ordination Date<br>-           | Last Day Worked<br>-  |
| Benefit_Custom4<br>5/1/2017 | Teacher Step<br>-    | # Months Worked<br>12          | Exclude from 401k transfer<br><input checked="" type="checkbox"/> |

4. In the 'Benefit\_Custom4' box, enter 08/31/XXXX (effective date for last day of coverage) and click 'Save'.

The screenshot shows a web-based form titled "Payroll Custom Fields" under the "Custom" tab. The form contains several input fields:

- Shared Employee: No
- Shared Location: -- Select --
- Benefit Deduction Months: 12
- Benefit\_Custom1: No
- Benefit\_Custom2: -- Select --
- Benefit\_Custom3: 12
- Ordination Date: [Calendar icon]
- Last Day Worked: [Calendar icon]
- Benefit\_Custom4: 8/31/2018** (highlighted with a red box)
- Teacher Step: [Empty field]
- # Months Worked: 10
- Exclude from 401k transfer:

A red arrow points to the "Save" button at the bottom left of the form.

**NOTE:** This information will feed over to Bswift in overnight processing and will terminate the employee's benefits on the appropriate end date.

**Recommendation:** On the September 1 benefit billing report, verify that the teacher's benefits no longer appear on the report.