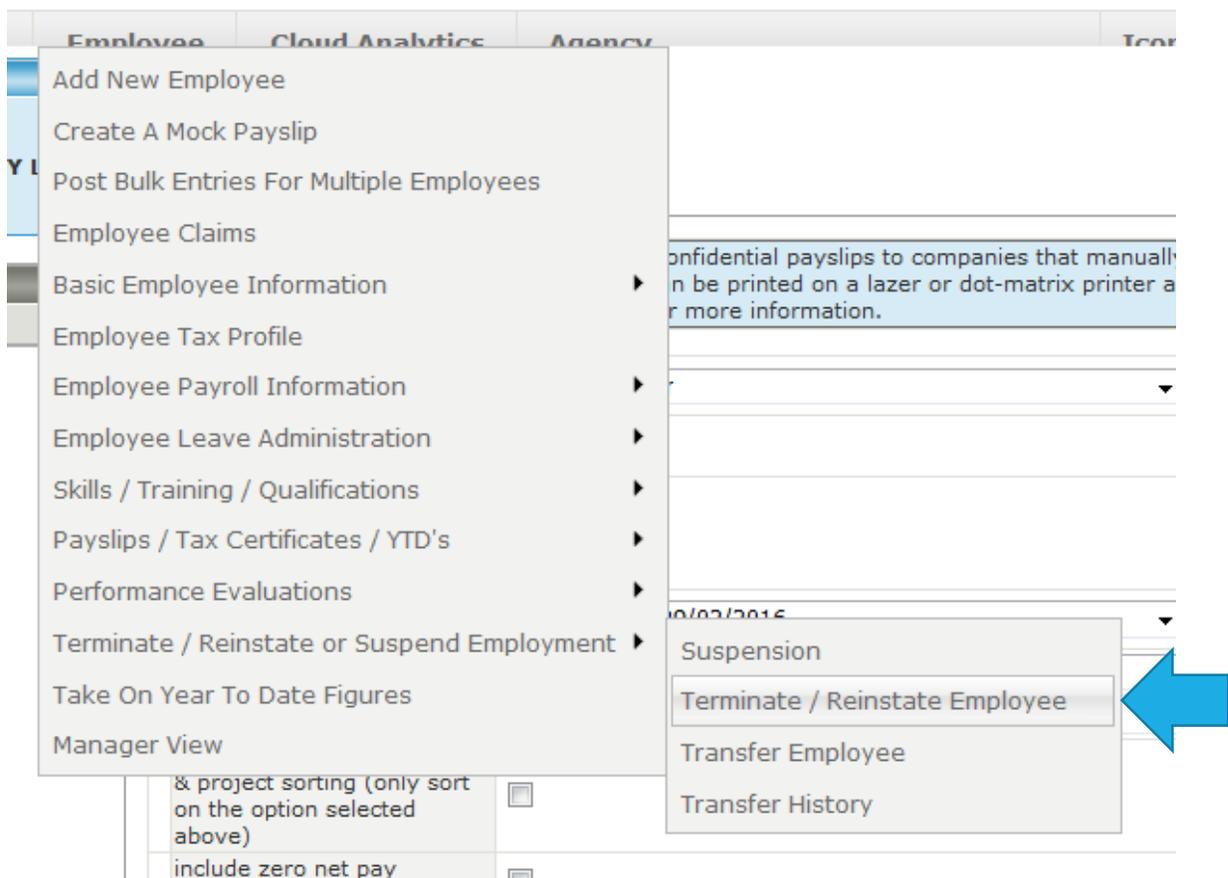


Paymaster Online Tutorial

Terminating and reinstating staff

Staff will come and go. That is the way of the working life. When running your payroll, you need to be able to terminate staff who are leaving or have left, or perhaps someone left and has come back. They can be reinstated on the payroll rather than added as a completely new employee. The benefit of this is that all their personal information is already captured.

In order to terminate a staff member, you need to click on **employee, terminate/reinstate or suspend, terminate/reinstate employee**



Select your employee from the list if you are not already in that employee's profile.

Search Criteria	Search Value	Active Emp's Only		
Employee Last Name	%	<input checked="" type="checkbox"/>		
Search				
tip - use the % character as a wildcard search i.e. smi% will return results beginning with smi				
Results				
HELPDESK DEMO PTY LTD				
Emp. No.	First Name	Last Name	Frequency	Select
0002	John	Greenwillow	Monthly	Select
0001	Susan	Helpman	Monthly	Select
0003	Sophie	Penson	Monthly	Select

I will be terminating Sophie Penson today. Due to unforeseen circumstances, she needs to leave her job. Oh dear. Her date of termination will be 31 October as she will be working until the end of the current month. When I select the employee, I am taken to a screen that looks like the tax status screen. Note: Terminations and Reinstatements can also be done on the Tax Status screen.

Details		Click here to view audit trail
* i want to ...	<input type="radio"/> terminate this employee	
* group join date:	1 October 2015	
* employment date:	1 October 2015	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:	<input type="text"/>	
not re-employable?	<input type="checkbox"/>	
reference no.:	<input type="text"/>	
Update		

At the top, it says **I want to....** And a **terminate this employee** option. Highlight the circle.

Details		Click here to view audit trail
* i want to ...	<input checked="" type="radio"/> terminate this employee	
* effective from which pay run:	October - 2015	
* group join date:	01 Oct 2015	
* employment date:	01 Oct 2015	
* termination date:	23 October 2015	
* termination reason:	--select one--	
do you want to automatically encash the remaining leave balance?	show leave balance and value	
	<input type="checkbox"/>	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:	<input type="text"/>	
not re-employable?	<input type="checkbox"/>	
reference no.:	<input type="text"/>	
Update		

When you highlight the block, new options appear on your screen. You must now input the date the employee is leaving, as well as a reason for the terminations. Below shows the available reasons in the drop down list.

Details [Click here to view audit trail](#)

* i want to	<input checked="" type="radio"/> terminate this employee	
* effective from which pay run:	October - 2015	
* group join date:	01 Oct 2015	
* employment date:	01 Oct 2015	
* termination date:	31 October 2015	
* termination reason:	--select one--	
do you want to automatically encash the remaining leave balance?	<ul style="list-style-type: none"> --select one-- Absconded Business Closed Constructively Dismissed Contract Expired Deceased Dismissed Employers Insolvency Illness/Medically boarded/Disabled Resigned Retired Retrenched Transferred to another branch Voluntary Severance Package 	
* nature of person:		
* tax status:		
tax reference number:		
not re-employable?		
reference no.:		

Update

Employment Date	Termination Date	Tax Status	Effective From	
01 Oct 2015		Standard Employment (Normal)		Edit Delete
1				

For this case, I will select resigned.

Underneath the reason for the termination, as a question asking do you want to automatically encash the remaining leave balance? You can click the block if yes, and the blue link to show you what the balance and leave value is.

NBNBNB!! The payroll is set up with the BCOE leave calculation as the default for leave pay. I suggest you check these settings and what it included before paying out leave automatically. The leave balance must also be correct otherwise the employee will be over or underpaid. This can be checked by clicking on **company, leave administration, BCOE leave income setup**.

Details [Click here to view audit trail](#)

* i want to	<input checked="" type="radio"/> terminate this employee	
* effective from which pay run:	October - 2015	
* group join date:	01 Oct 2015	
* employment date:	01 Oct 2015	
* termination date:	31 October 2015	
* termination reason:	Resigned	
do you want to automatically encash the remaining leave balance?	(1.25 days = 115.37) <input checked="" type="checkbox"/>	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:		
not re-employable?	<input type="checkbox"/>	
reference no.:		

Update

I can now click on update. If I navigate anywhere on this employee's profile, there will be a red banner saying the employee is terminated and the date.

Employee Tax Profile

Terminated on 31 Oct 2015 - Resigned

[Click here to toggle page instructions](#)
[PAGE HELP](#)

Details
[Click here to view audit trail](#)

* i want to	<input type="radio"/> reinstate this employee resuming this tax record <input type="radio"/> reinstate this employee starting a new tax record	
* effective from which pay run:	October - 2015	
* group join date:	1 October 2015	
* employment date:	1 October 2015	
* termination date:	31 October 2015	

If I go to the employee's Payslip, the encashed leave will appear automatically.

<< Previous Payslip
Next Payslip >>
Compare Payslips
[Click here to view audit trail](#)

allowances						Add New
Component Name	Tax Code	Qty	Part of Package	Delete Input Values	Amount	
Basic Pay	3601	173.36	Yes		2,000.00	edit
Leave Pay	3605	1.25	No	delete	115.37	edit
Total					2,115.37	

The employee's leave balance will also be zero as we have paid it out to her. To view the leave balance, click on **employee, leave administration, leave balances**.

Employee
Cloud Analytics
Agency

- Add New Employee
- Create A Mock Payslip
- Post Bulk Entries For Multiple Employees
- Employee Claims
- Basic Employee Information
- Employee Tax Profile
- Employee Payroll Information
- Employee Leave Administration
 - Leave Balances
 - Leave Setup
 - Leave Application
 - Leave Adjustments
 - Leave Summary
 - Company Leave Schedule
- Skills / Training / Qualifications
- Payslips / Tax Certificates / YTD's
- Performance Evaluations
- Terminate / Reinstatement or Suspend Employment
- Take On Year To Date Figures
- Manager View

Family Responsibility

Details

run: --October - 2015 (2)

Annual

Leave Description	Leave Accrual	Leave Balance	Due to Expire	Leave Value Due	Leave Value Calculation
Annual Leave	1.25	0.00		0.00	View

Sick

Leave Description	Leave Accrual	Leave Balance	Due to Expire
Sick Leave	30.00	30.00	30.00 days are due to expire at the end of Sep 2018

Family Responsibility

Leave Description	Leave Accrual	Leave Balance	Due to Expire
Family Responsibility Leave	3.00	3.00	3.00 days are due to expire at the end of Sep 2016

The leave balance is zero.

If I go to the employee list, my terminated employee no longer shows. Where did she go??? Oh wait, the **active emp's only** block is ticked! This means I only see active employee's in my list.

Search Criteria Search Value **Active Emp's Only**

Employee Last Name % Search

tip - use the % character as a wildcard search i.e. smi% will return results beginning with smi

Results

HELPDESK DEMO PTY LTD

Emp. No.	First Name	Last Name	Frequency	
0002	John	Greenwillow	Monthly	Select
0001	Susan	Helpman	Monthly	Select



If I untick that block, I am asking the system to show me everyone on my payroll, including the terminated staff. Sophie is now back in the list! The little red circle shows she is terminated.

Search Criteria Search Value **Active Emp's Only**

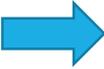
Employee Last Name % Search

tip - use the % character as a wildcard search i.e. smi% will return results beginning with smi

Results

HELPDESK DEMO PTY LTD

Emp. No.	First Name	Last Name	Frequency	
0002	John	Greenwillow	Monthly	Select
0001	Susan	Helpman	Monthly	Select
 0003	Sophie	Penson	Monthly	Select



It is now a few weeks later, and Sophie has asked if she can return to work. Now we need to reinstate her. This is done in the same place as the termination.

Employee Tax Profile

Terminated on 31 Oct 2015 - Resigned

[Click here to toggle page instructions](#) [PAGE HELP](#)

[Click here to view audit trail](#)

* i want to	<input type="radio"/> reinstate this employee resuming this tax record	
	<input type="radio"/> reinstate this employee starting a new tax record	
* effective from which pay run:	October - 2015	
* group join date:	1 October 2015	
* employment date:	1 October 2015	
* termination date:	31 October 2015	
* termination reason:	Resigned	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:	<input type="text"/>	
not re-employable?	<input type="checkbox"/>	
reference no.:	<input type="text"/>	

Now we have more options at the top. We have 2 choices:

- 1) Reinstate resuming this tax record. This is used when the employee returns to work less than 3 months after they left, and have had no other employment. The tax certificate will continue as the same one as before.
- 2) Reinstate starting a new tax record. This is used when the employee has been away for some time, and has had other employment. This will create a separate tax certificate as if the employee is brand new.

For this case, I am going to select the first option, resuming the tax record.

Once selected, I can now just click on update. The employee no longer shows as terminated, and is active on the payroll again.

[Click here to view audit trail](#)

* i want to	<input checked="" type="radio"/> reinstate this employee resuming this tax record	
	<input type="radio"/> reinstate this employee starting a new tax record	
* effective from which pay run:	October - 2015	
* group join date:	01 Oct 2015	
* employment date:	01 Oct 2015	
* nature of person:	B - Individual without ID number or Passport no	
* tax status:	Standard Employment (Normal)	
tax reference number:	<input type="text"/>	
not re-employable?	<input type="checkbox"/>	
reference no.:	<input type="text"/>	