

Dealing with a Payroll Leaver

In summary the process for dealing with a payroll leaver is as follows:

- ◆ Set the leaving date in the Employee Details Tab of the Employee Maintenance screen
- ◆ Run and finalise the final payroll for the employee
- ◆ Set the employee status to “Inactive” in the Payroll Status box of the **Payroll/Tax Details** screen for the employee.
- ◆ Run the P45 report for the employee and provide to the employee.

Setting the Leaving Date

From the **LISTS** menu, click **OFFICERS/EMPLOYEES** to show a list of existing employees and then click **EDIT** adjacent to the relevant employee:

Or from the **PAYROLL** menu, click **SET EMPLOYEE**, and click **SET** adjacent to the employee.

The employee maintenance screen is displayed. Click on the Employment Details tab. Enter the leaving date in the **Employment Ended** box.



| Personal Details | Address | Business Offices | Employment Details | Bank Details |
|--|---------|------------------|--------------------|--------------|
| Employment Started: 01/01/2008 [Calendar] [Red Star] [Question Mark] | | | | |
| Employment Ended: 23/10/2009 [Calendar] [Question Mark] | | | | |
| [Left Arrow] [Right Arrow] [Submit] [Delete] [Cancel] | | | | |

Run the Final Payroll for the Employee

If necessary, edit the final amounts due to the employee in the **Pay** screen for the employee.

PAYROLL → **SET EMPLOYEE** → **SET** relevant employee → **PAY**

Run the final payroll for the employee. This can be done as an individual payroll by making sure the employee is **SET** as above and then selecting this employee during calculating

and finalising payrolls in the usual way. The user can also of course run the final payroll with a normal payroll run of the dates are co-terminus.

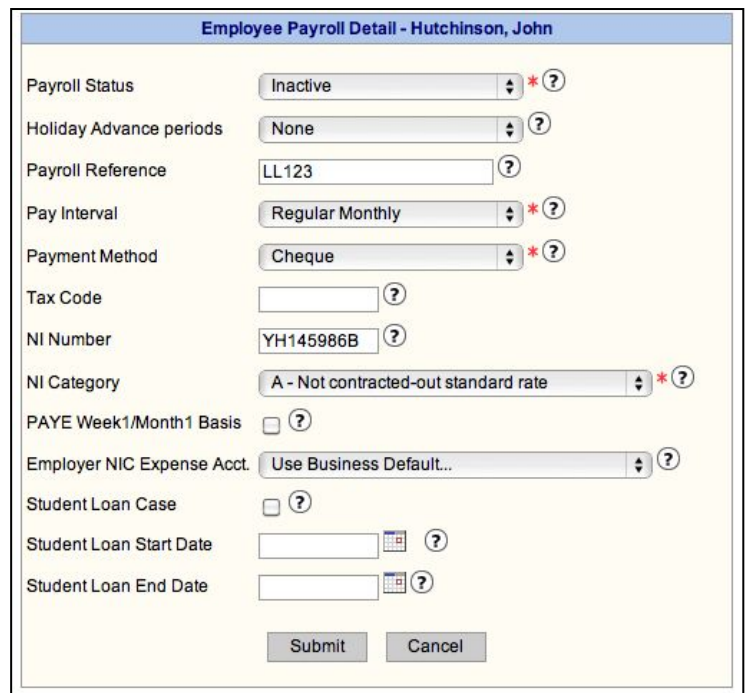
Note it is the responsibility of the user to make sure all appropriate payroll runs for the leaving employee have been run before the P45 is prepared.

Set the Employee Payroll Status to “Inactive”

From the Pay Payroll/Tax Details screen amend the Payroll Status to “Inactive”

PAYROLL → SET EMPLOYEE → **SET** relevant employee → PAYROLL/TAX DETAILS

Inactive status means that the employee is excluded from any future payroll runs; the history remains however and will be included in the payroll year-end figures.



Run the P45 report

Prepare the P45 for the employee from Payroll Reports

PAYROLL → REPORTS → DETAILS OF EMPLOYEE LEAVING WORK (P45)

Select the relevant employee and click **Generate** to run the report. Note a warning is given if a valid leaving date has not been set.

