How to create/alter New Leave Type?

Add/Configure/Edit Leaves Types

This document will help the user to Add/Configure/Edit Leave Types based on their requirements.

Go to **Settings** >> **Leaves**

Click on **Add Leave** button to add new leave types OR to edit existing leave types click on **View/Edit** icon.
Enter leave name in **NAME** field and **Abbreviation,** *on adding new leave types*
In **Credit** tab

Credit Frequency

- Select leave credit frequency i.e., Monthly/Quarterly/Half Yearly/Yearly these option would credit leaves balance based on calendar day
- Based on DATE OF JOINING too user can select leave credit frequency

Credit on: Last Day or First Day or On Pay Block: If you choose On Pay Block Credit will happen once you "Lock Pay Process" Under process Control Payroll.

Credit is attendance dependent: If you choose "Yes "Leaves will be Crediting based on the worked days i.e., on PRORATA basis for MONTHLY credit frequently.

Proration applicable for new joiners: If you choose "Yes" leaves will be crediting prorated based on Date of Joining.

Credit Type: Select Flat OR Slab
Slab is using for different Number of days as to credit at each Completed months - Monthly/Quarterly/Half Yearly/Yearly.

No of days: Enter the number of day's leaves to be credited, preferable to enter days only in case of credit type **FLAT**.

Encashment:

Can carry forward? : Select "**Yes**", if the leave is carry forwarded for next Leave Calendar year.

Max Carry forward at year end: Enter the Annual Carry forwarding Leaves Numbers OR Specify the Maximum Number of days that can be carried forward to next Leave Calendar year.

Is En-cashable? : Select "Yes", if leave balances can be en-cashed.

Max Days En-cashable: Enter the Maximum Leaves Encashment Days, either on separation or while in service, if applicable.

En-cashable Formula: Enter the leave En-cashable Formula.

Rules:

Min. Service Period before leave can be applied: Enter Minimum number of days, completing which (counting from **Date of Joining**) employees can apply/avail leaves.

Min/Instance: Specify the minimum number of days that can be taken by employees.

Max/Instance: Specify the Maximum number of days that can be taken by employees.

Leave Request Window: Enter the number of days after which employees should not be able to apply leaves which they have already availed/taken.

Max leave that can be taken: Specify the Maximum Number of days that can be availed as leave for a specified period.

Max. Leave balance: Specify the Max days of leave, entering a number here will restrict employees availing leave though they have more leave balance.

Negative Leave Max: Specify the Maximum number of Negative days Employee can request.

Un-availed leave will lapse: Selecting this option will lapse un-availed leave balance. The period considered for this is the same as "Credit Type" in the Credit tab.

Notice for leave request: Specify the minimum number of days' notice before applying the leave.

Sandwich Rule:

Is Leave part of weekly off: Selecting this option will include WEEKLY OFF'S as leave taken, if there are WEEKLY OFF'S in leave taken period**.**

Is Leave part of Holiday: Selecting this option will include HOLIDAY'S as leave taken, if there are HOLIDAY'S in taken leave period.

Is Leave part of preceeding week off: Selecting this option will include PREVIOUS DAY WEEKLY OFF as leave taken.

Is Leave part of preceeding holiday: Selecting this option will include PREVIOUS DAY HOLIDAY as leave taken.

Is Leave part of succeeding week off: Selecting this option will include NEXT DAY WEEKLY OFF as leave taken.

Is Leave part of succeeding holiday: Selecting this option will include NEXT DAY HOLIDAY as leave taken.

Clubbing Rule:
Can't be clubbed with: Select leave types, which should not clubbed along with the configured leave types.

Applicability:

Criteria: You can configure multiple rules (Type of employee, designation, cost center etc…) by clicking on 'Add' button

Note: After creating leave type, you will need to allocate it to employees. You can do that by navigating to **Settings >> Leaves** and clicking on **Allocate Leaves**