

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

Add Leave

Name *

Abbreviation *

Credit | Encashment | Rules | Applicability

Credit Frequency *

Credit On *

Credit is attendance dependent

Proration applicable for new joinees

Credit Type *

No. of days

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:

The screenshot shows a web form for configuring a leave rule. The form is titled 'Sick Leave' and has an abbreviation 'SL'. It features four tabs: 'Credit', 'Encashment', 'Rules' (which is selected), and 'Applicability'. The 'Rules' tab contains several input fields and checkboxes. On the left side, there are fields for 'Min. service period before leave can be applied (days)', 'Min/Instance (days)', 'Max/Instance (days)', 'Leave request window' (set to 0.00), 'Max leave that can be taken' (with a dropdown for 'Choose a period' and a value of 0 days), and 'Max number of instances leave can be taken' (with a dropdown for 'Period' set to 'None'). On the right side, there are fields for 'Max. Leave balance', 'Max negative leave balance' (set to 0.00), a checkbox for 'Unavailed leave will lapse', a 'Notice for leave request' field (set to 0), and a checkbox for 'Is attachment required'. At the bottom, there are two sections: 'Sandwich Rule' with three checkboxes ('Is Leave part of weekly off?', 'Is Leave part of Holiday?', 'Is Leave part of preceding week off?') and 'Clubbing Rule' with a checkbox for 'Can't be clubbed with' and two options: 'Loss of Pay' (unchecked) and 'Earned Leave' (checked).

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:

Add Leave

Name *

Abbreviation *

Credit | Encashment | Rules | Applicability

Criteria

CRITERIA	TYPE
ApplicableTo	Female.General.Male

Cancel Save

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**