# How to create/alter New Leave Type?

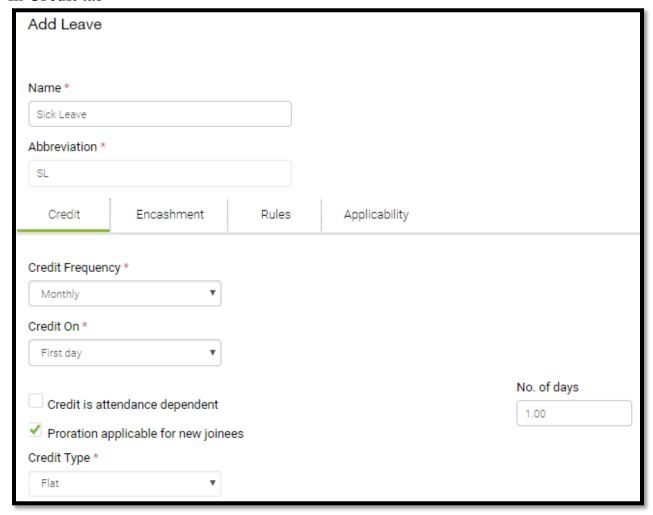
### **Add/Configure/Edit Leaves Types**

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:**

Name *			
Sick Leave			
Abbreviation *			
SL			
Credit Encashment Rules Applicability			
Min. service period before leave can be applied (days)	Max. Leave balance		<b>?</b>
Min/Instance (days)	Max negative leave balance		
	0.00		
Max/Instance (days)	Unavailed leave will lapse		
	Notice for leave request		
Leave request window	0		
0.00	Is attachment required		
Max leave that can be taken			
days per Choose a period ▼ 0 days			
Max number of instances leave can be taken			
0 Period None ▼			
Sandwich Rule		Obstrice Dule	
		Clubbing Rule	
Is Leave part of weekly off?		Can't be clubbed with  Loss of Pay	
Is Leave part of Holiday?		Loss of Pay  ✓ Earned Leave	
☐ Is Leave part of preceeding week off?		✓ Carried Leave	

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**