

Leave Management System

Core Features - India

- **Leave Types**
 - Casual leave, Privilege leave, Maternity/Paternity leave, Leave Without Pay (LWP), Compensatory Off.
- **Leave Policy Setup:** For details check slide no. 3
- **Leave Request & Approval Flow**
 - Employees request leave, managers approve/decline, HR oversees. (Details in slide no. 6)
- **Multi-level Approvals**
 - **Multi-level Approvals for Leaves:** (Employee → L1 Manager → HR)
 - **Multi-level Approvals for Comp Off:** (Employee → L1 Manager → L2 manager → HR)
- **Notifications & Reminders**
 - Email notifications for requests, approvals, Changes in Leave applications, leave cancellations and balances to Employees keeping HR & Manager in Cc., Holiday Reminders via email
 - If any employee applies for leave it should not calculate holidays/weekends
 - Reminder of Comp off Expiring on date to Employee & Date
 - Suggested by Mukesh– Email notification should have Approve / Reject option,

Leave Policy Setup- India

- **Leave Calendar:**
 - January to December (Calendar Year)
- **Monthly Leave Accrual:**
 - **1 Casual Leave (CL) and 1 Privilege Leave (PL)** added on the **1st of every month**
- **Joining-Based Leave Allocation:**
 - Employees joining **between 1st to 15th** of the month receive **full day leave** for that month
 - Employees joining **after the 15th** receive **0.5 day leave** for that month
- **Carry-Forward Rules:**
 - **Casual Leave** balance **expires on 31st December**. **Privilege Leave** balance can be **carried forward**, but **maximum 30 PLs** allowed as of **31st December**
 - **Casual Leave & Privilege Leave** balance should be **carried forward to the next month** based on the usage of leave
- **Maternity & Paternity Leave:**
 - **Maternity Leave:** 180 days applicable **only to married female employees**
 - **Paternity Leave:** 5 days applicable **only to married male employees**
 - **No CL or PL** will be applicable **during maternity leave period**

Core Features - USA

- **Leave Types**
 - Paid time off (PTO), Bereavement leave, Leave Without Pay, Comp Offs.
 - Leave calendar – January to December
- **Leave Policy Setup:** For details check slide no. 5
- **Leave Request & Approval Flow**
 - Employees request leave, managers approve/decline, HR oversees. (Details in slide no. 6)
- **Multi-level Approvals**
 - **Multi-level Approvals for Leaves:** (Employee → L1 Manager → HR)
 - **Multi-level Approvals for Comp Off:** (Employee → L1 Manager → L2 manager → HR)
- **Notifications & Reminders**
 - Email notifications for requests, approvals, Changes in Leave applications, leave cancellations and balances to Employees keeping HR & Manager in Cc., Holiday reminders via email
 - Reminder of Comp off Expiring on date to Employee & Date
 - Suggested by Mukesh– Email notification should have Approve / Reject option,

Leave Policy Setup- USA

- **Leave Calendar**
 - January to December (Calendar Year)
- **Paid Time Off (PTO) Allocation**
 - **AVP and Below:** Receive **15 days PTO** at the **start of the year**
 - **VP and Above:** Receive **20 days PTO** at the **start of the year**
- **Carry-Forward Rules**
 - Only **AVP and Below** employees can **carry forward PTOs**
 - **Condition:** If remaining PTOs are **Maximum of 5 days**, they will be carried forward to the next year
 - **VP and Above:** No PTO carry-forward allowed.
 - If an employee joins mid-year, their leave balance is calculated on a prorated basis

Leave Request & Approval Flow

- **Employee Initiates Request**

- Employees submit leave requests through the LMS / HRMS portal or designated system.

- **Manager Review & Action**

- Reporting managers receive the request and either approve or decline based on team schedules and policy guidelines.

- **HR Oversight**

- HR monitors the overall leave process, ensures policy compliance, and addresses any exceptions or escalations.

Dashboard

- Leave and Comp Off Policy
- Leave Balance section
- Booked leaves Section
- Approved leaves status
- Upcoming Holiday
- Pie Chart of Leaves Applied(Optional)

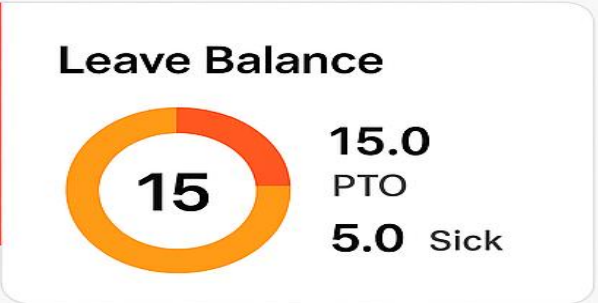
Dashboard

Dashboard



Leave and Comp Off Policy

View details of leave types, accrual, carry forward, and required proofs.



Booked Leaves



May 15, 2024

Vacation

Pending



Upcoming Holidays



May 27, 2024

Pie Chart of Leaves Applied



Leave Module

- Leave Types
- Leave Application
- Leave Application Status
- Leave Balance (Year wise Segregated)
- Leave Approval (For Reporting Managers)
- Admin Leave Approval

Leave Module – Leave Types

Leave Types ↗

Leave Application

Leave Application Status

Leave Balance

Leave Approval

(For Reporting Managers)

Admin Leave Approval

- Privilege Leaves
- Casual Leaves
- Leave Without Pay
- Comp Off
- Maternity Leave
- Paternity leave

Leave Module – Leave Application

Leave Types

Leave Application 

Leave Application Status

Leave Balance

Leave Approval
(For Reporting Managers)

Admin Leave Approval

Leave Application

Employee Name – Dropdown list of all employees

Leave Type – Dropdown list of Leave Types

Date (From) – (DD/MM/YYYY)

Date (To) – (DD/MM/YYYY)

Duration – Full Day / Half Day

If Selects Half Day – ☐ First Half ☐ Second Half

Reason –

Leave Module – Leave Application Status

Leave Types

Leave Application

Leave Application Status ↗

Leave Balance

Leave Approval
(For Reporting Managers)

Admin Leave Approval

Emp Id	Emp Name	Date From	Date <u>To</u>	Approval Status

Leave Module – Leave Balance

Leave Types

Leave Application

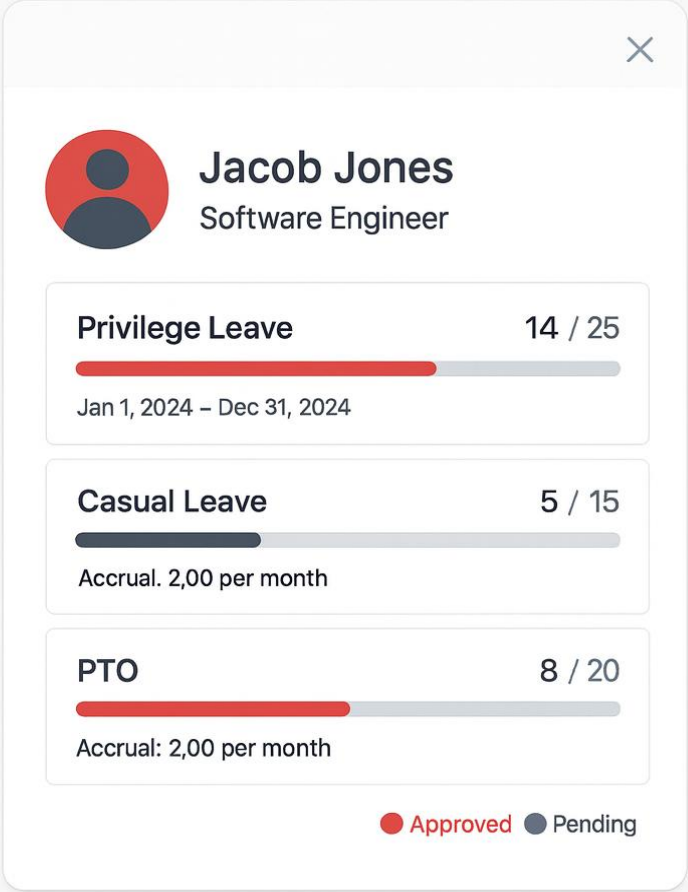
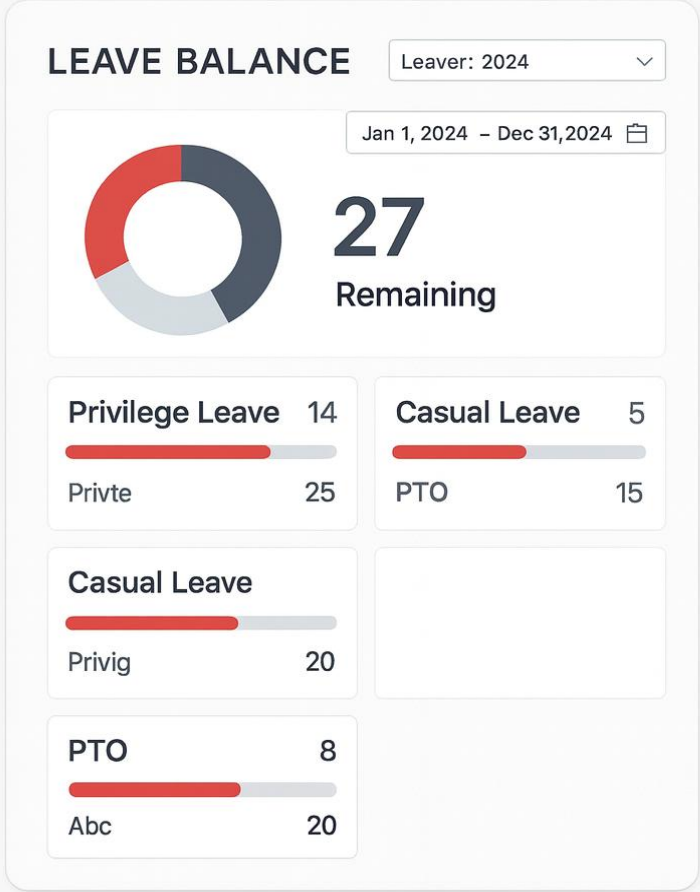
Leave Application Status

Leave Balance 

Leave Approval

(For Reporting Managers)

Admin Leave Approval



Leave Module – Leave Approval

Leave Types

Leave Application

Leave Application Status

Leave Balance

Leave Approval
(For Reporting Managers)

Admin Leave Approval

Leave Approval

☐ Show overlapping

Leave Type

Any

Team Calendar

04/10/2024 – 04/30/2024

Filter

Bulk Actions

Pending

<input type="checkbox"/>	D:	Name	Type	Comments/Attachment	
<input type="checkbox"/>		 Alex Johnson 13-Jan 2024	Sick Leave	Intercation	Approve
<input type="checkbox"/>		 Emily Smith 31-Jan 2024	Vacation	Attachment	Approve
<input checked="" type="checkbox"/>		 Michael Brown 18-Jan 2024	Sa lfd-Jue	SLA due in tdagli	Approve
<input type="checkbox"/>		 Jacob Williams 18-Jan 2024	Vacation	Attachment	Approve
<input checked="" type="checkbox"/>		 Jacob Will.ams 31 Jan 2024	Sir:tr due	Appitcfimnt	Approve

Team Calendar

S	M	T	W	T	F	S
1	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	28	27
28	Overlap	1	2	3	4	
5	6	7	8	9	10	11

Team Calendar

11	12	13	14	16	17	
18	19					
25	26	27	28	Overlap		

Leave Module – Admin Leave Approval

Leave Types

Leave Application

Leave Application Status

Leave Balance

Leave Approval
(For Reporting Managers)

Admin Leave Approval ➤

LEAVE APPROVAL



Leave Type



Status

Employee



Bulk Actions

Employee	Leave Type	Dates	Status
Jacob Jones	Casual Leave	01/09/2023 to 01/10/2023	Pending
Arlene McCoy	Sick Leave	02/14/2023 to 02/16/2023	Pending
Eleanor Pena	Paid Time Off	03/20/2023 to 03/25/2023	Pending
Ronald Richards	Unpaid Leave	04/05/2023 to 04/08/2023	Pending

Details



Jacob Jones
Casual Leave

Leave Type:
Casual Leave

Dates:
01/09/2023 to 01/10/2023

Reason:
Family event

Approve

Reject

Comp Off Module

- Comp Off Policy
- Comp Off Application
- Comp Off Application Status
- Comp Off Balance (Should Lapse after 3 months from the date of approval)
- Comp Off Approval (For Reporting Managers)
- Admin Comp Off Approval

Comp Off Module – Comp Off Policy

Comp Off Policy

Comp Off Application

Comp Off Application Status

Comp Off Balance

Comp Off Approval
(For Reporting Managers)

Admin Comp Off Approval

Comp Off Policy

1. If any employee works for **5 hrs** they will get **half day comp off** and if they work for **8 hrs** they will get **full day comp off**.
2. If they work on weekends and holidays then only they will be eligible for comp off.
3. Comp off will be **lapsed after 3 months** from date of approval.

Comp Off Module – Comp Off Application

Comp Off Policy

Comp Off Application ↗

Comp Off Application Status

Comp Off Balance

Comp Off Approval
(For Reporting Managers)

Admin Comp Off Approval

Comp Off Application

Employee Name

Employee ID

To Date

From Time

To Time

Project

Submit

Comp Off Module – Comp Off Approval Status

- Comp Off Policy
- Comp Off Application
- Comp Off Application Status**
- Comp Off Balance
- Comp Off Approval
(For Reporting Managers)
- Admin Comp Off Approval

Employee ID	Employee Name	From	Status
EMP001	John Doe	01/04/2024	Approved
EMP002	Jane Smith	10/04/2024	Rejected
EMP003	Michael Brown	15/04/2024	Approved
EMP004	Emily White	20/04/2024	Approved

Comp Off Module – Comp Off Balance

Comp Off Policy

Comp Off Application

Comp Off Application Status

Comp Off Balance ↗

Comp Off Approval
(For Reporting Managers)

Admin Comp Off Approval

Comp Off Balance



Request Comp Off

Adjust Balance

Export

Start Earned

All

Status

All

Comp-Off Credits

Earned On	Days	Earned For	Expiry	Status	Used On	Action
04/20/2024	1	Overtime on 04/19/24	06/19/2024	Available		<div>Use</div>
04/10/2024	1	—	04/25/2024	—	04/25/2024	
02/15/2024	1	Overtime on 02/15/24	04/15/2024	Expired		—
02/10/2024	1	Overtime on 02/09/24	04/10/2024	Available		<div>Use</div>

Comp Off Module – Comp Off Approval

Comp Off Policy

Comp Off Application

Comp Off Application Status

Comp Off Balance

Comp Off Approval 
(For Reporting Managers)


Admin Comp Off Approval

 Pending

 **Approved**

 Rejected

 History

 Team
Calendar

 Policy

Comp Off Approval

For Reporting Managers

Pending Requests >

Bulk Approve ▾

 Search

Employee Name	Date Worked	Compensatory Off	Hours Earned	Balance
Sophia Martinez Sophia Martinez	Apr 25 2022	Jan. 27 2022	4	Approve
James Johnson James Johnson	Apr 30 2022	Feb. 14 2022	8	Approve
Emma Davis Emma Davis	Apr 27 2022	Feb. 28 2022	4	Approve
Michael Brown Michael Brown	Apr 30 2022	Apr. 28 2022	5	Approve
				Comment

1 < Next

1 2 3 >

Comp Off Module – Admin Comp Off Approval

Comp Off Approval

Date Range

Start date

📅

Department

All

▼

Status

Pending

▼

Approve

Reject

Request Info

Apply

<input type="checkbox"/>	Request ID	Employee	Date Worked	Hours Earned	Applied Date	Status
<input type="checkbox"/>	CO-1036	Jacob King	08/23/2023	8 hours	10/10/2023	Pending
<input type="checkbox"/>	CO-1035	Emma Hayes	08/14/2023	6 hours	10/08/2023	Pending
<input type="checkbox"/>	CO-1034	Ethan Flores	08/05/2023	9 hours	10/18/2023	Pending
<input type="checkbox"/>	CO-1033	Mia Turner	07/22/2023	5 hours	10/13/2023	Pending
<input type="checkbox"/>	CO-1032	Lucas Wright	07/15/2023	7 hours	10/11/2023	Pending

Request Details

Request ID

CO-1036

Employee

Jacob King

Date Worked

06/23/2023

Hours Earned

8 hours

Applied Date

10/10/2023

Leave To Avail

10/23/2023

Balance

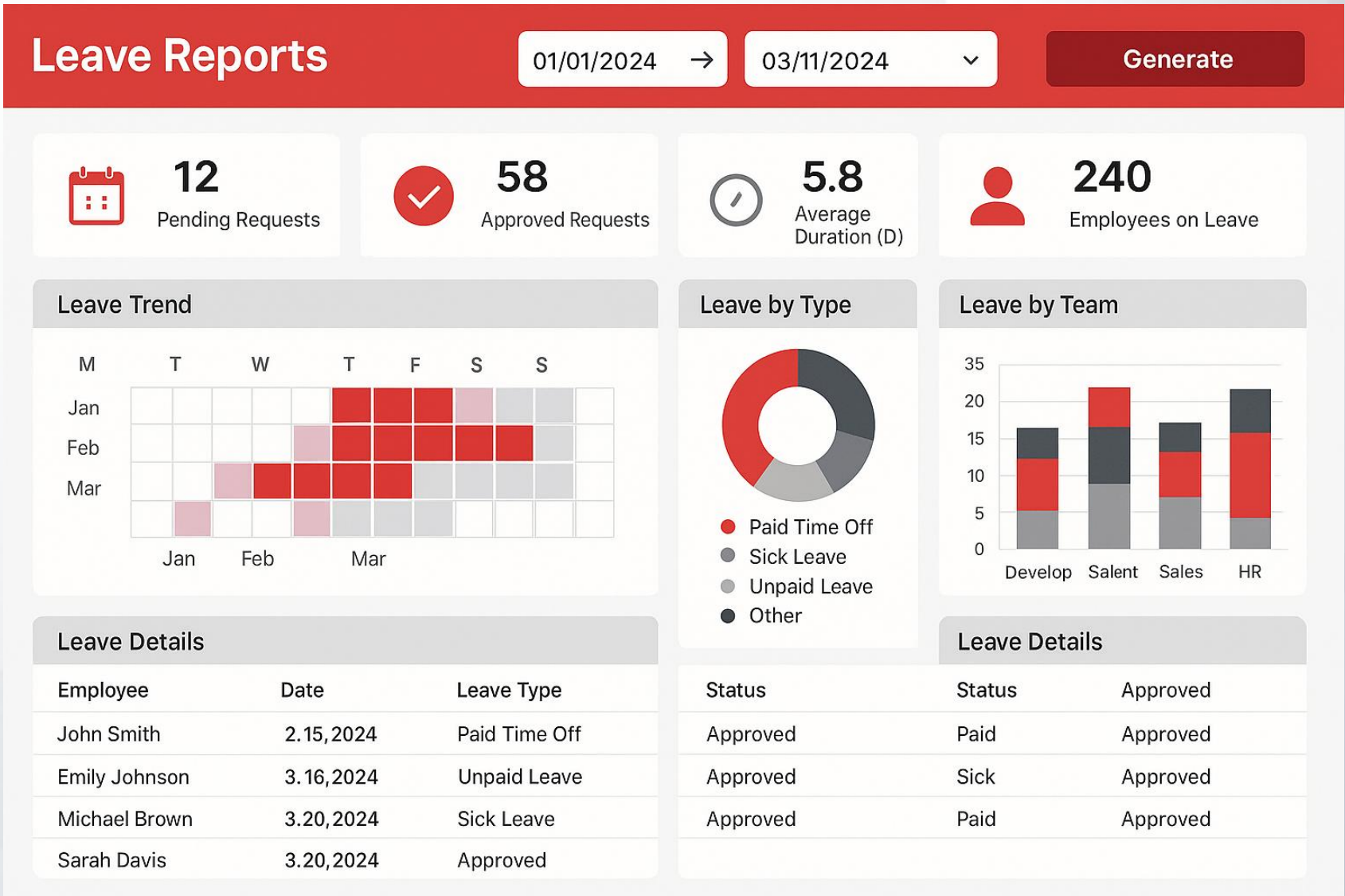
8 hours

Approve

Reject

Request Info

Reports



Holiday Lists – India & USA

← Settings > Holidays

India

USA

India Holiday List

Date	Holiday
26 Jan 2024	Republic Day
25 Mar 2024	Holi
29 Mar 2024	Good Friday
11 Apr 2024	Id-ul-Fitr
15 Aug 2024	Independence Day
02 Oct 2024	Mahatma Gandhi's Birthday
25 Dec 2024	Christmas Day

Additional Points

- Comp off will be added only after manager's approval
- Leave balance should be visible at the time of leave application
- All field should be mandatory in leave & comp off application