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)
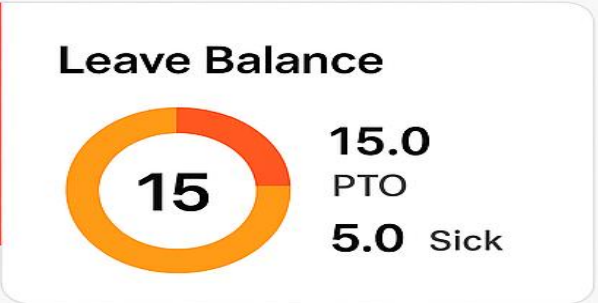
Dashboard

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 To	Approval Status

Leave Module – Leave Balance
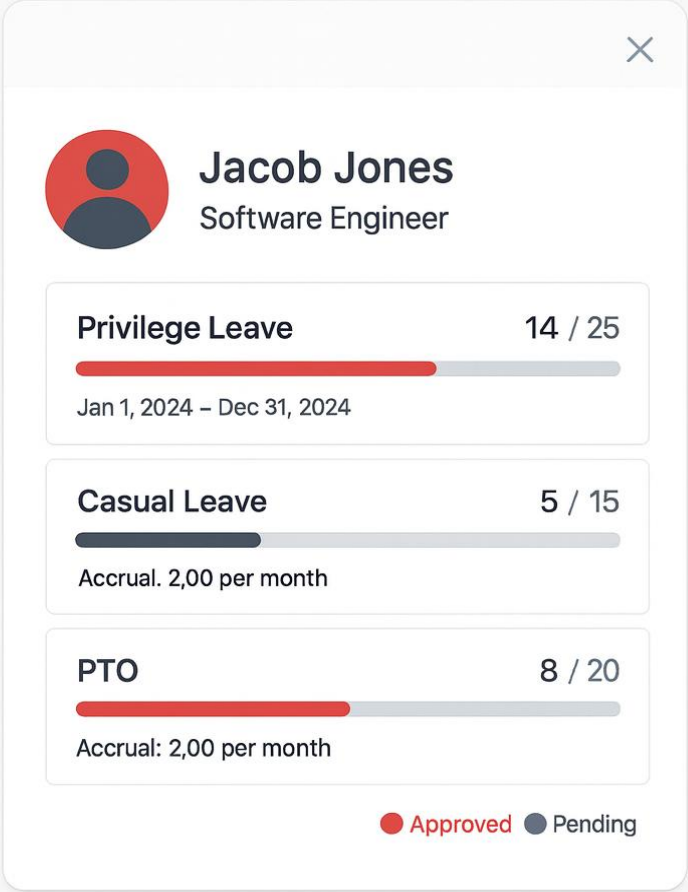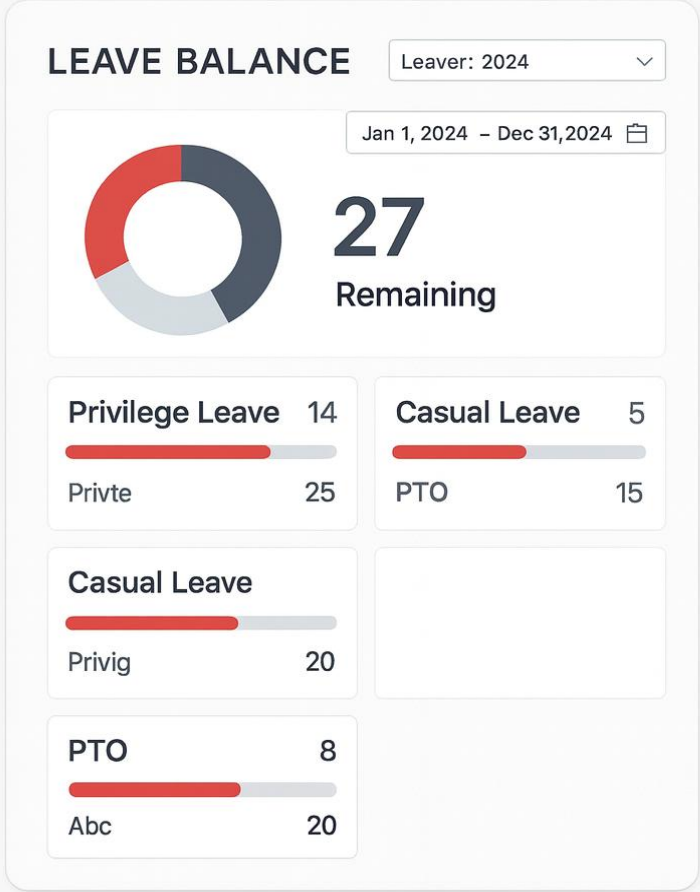
Leave Module – Leave Approval

Leave Module – Admin Leave Approval

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 dae date of approval.

Comp Off Module – Comp Off Application

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

Earned Days	Used		
4	1	3	3 Expiring Soon

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		Use
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		Use

Comp Off Module – Comp Off Approval

Comp Off Module – Admin Comp Off Approval

Reports

Holiday Lists – India & USA

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