

Slide 1

Slide notes: At the 'Leave Events' menu, we have an option to perform 'Leave Forfeit'. This option is useful to apply maximum allowed Leave Balances at selected Dates, for example at end of Company Year or other.

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Help Submit Quit Functions Commands

Leave Forfeit

Leave Type: 1: Active Only

Active / Inactive

Forfeit - Days

Forfeit Date

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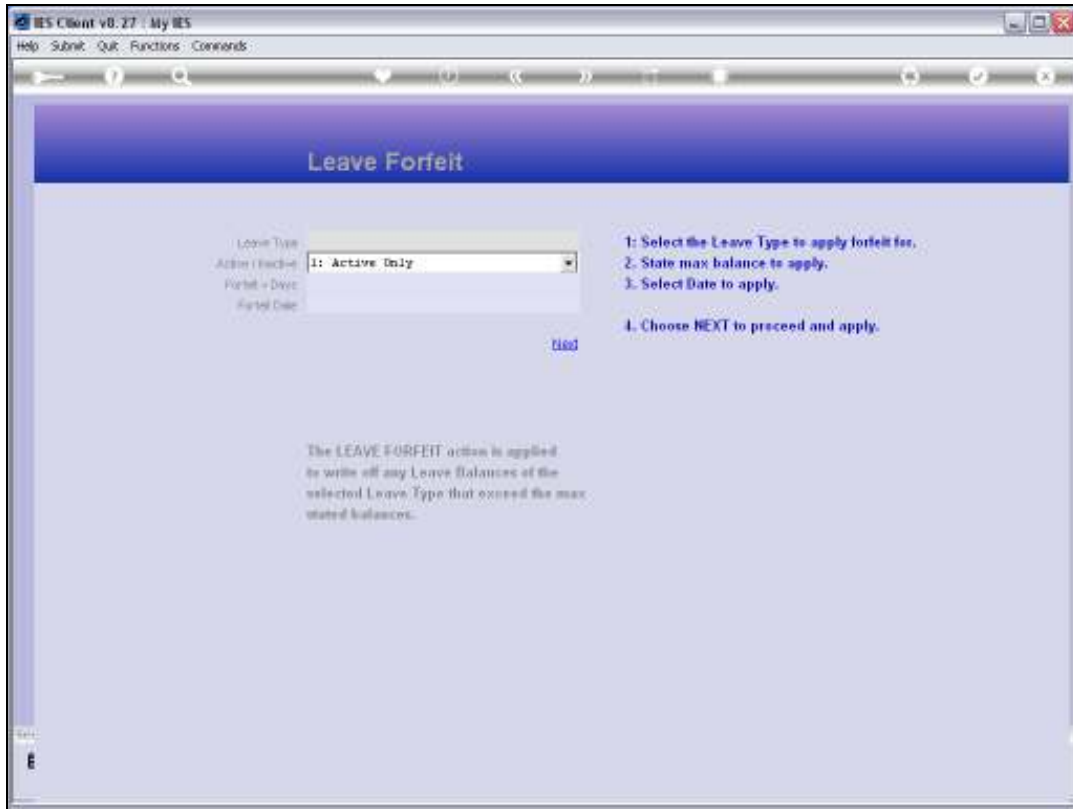
- 1: Select the Leave Type to apply forfeit for.
- 2: State max balance to apply.
- 3: Select Date to apply.
- 4: Choose NEXT to proceed and apply.

The LEAVE-FORFEIT action is applied to write off any Leave Balances of the selected Leave Type that exceed the max stated balances.

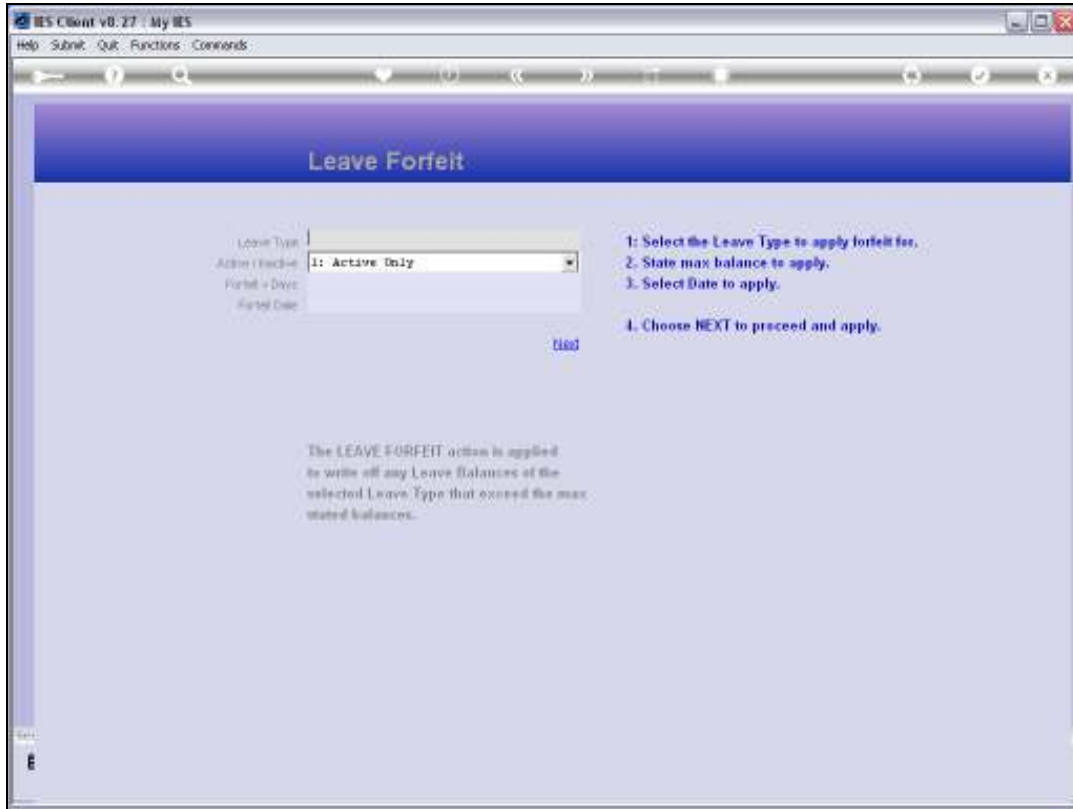
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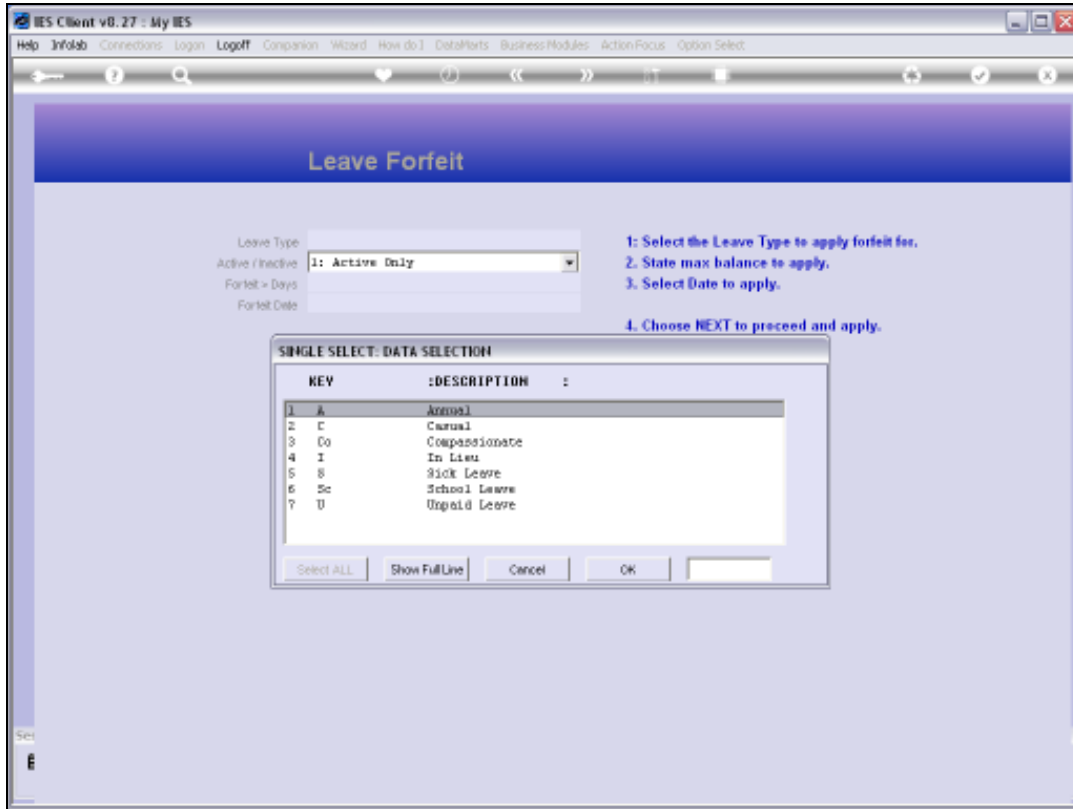
Slide notes: The Leave Forfeit may be applied for any Leave Type that we use in our Leave System.



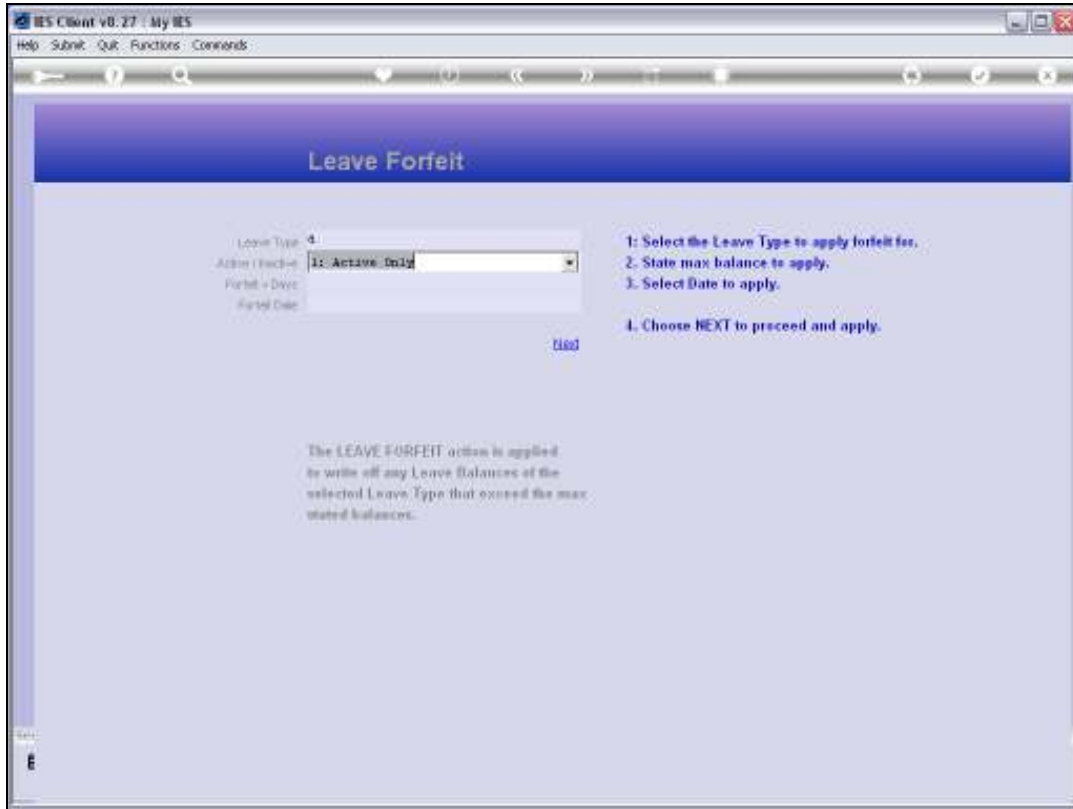
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Slide notes:



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Slide notes:



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Slide notes:

IES Client v8.27 - My IES
Help Submit Quit Functions Commands

Leave Forfeit

Leave Type:
Active / Inactive:
Forfeit - Days:
Forfeit Date:

[NEXT](#)

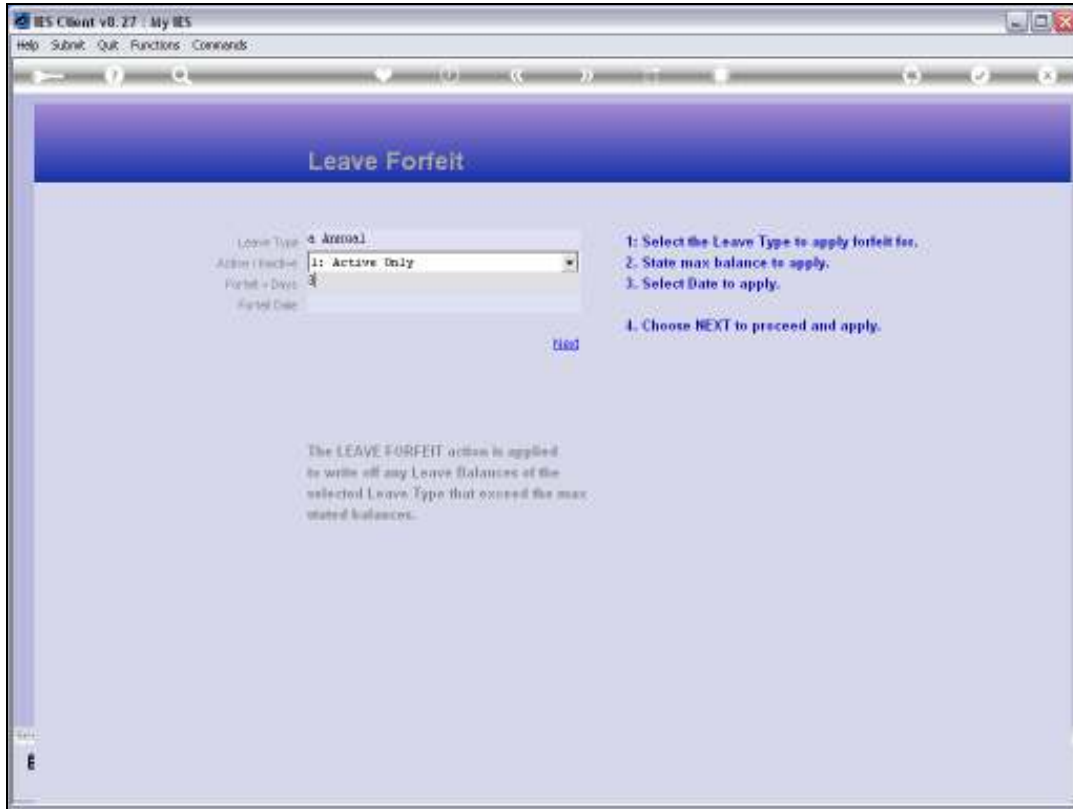
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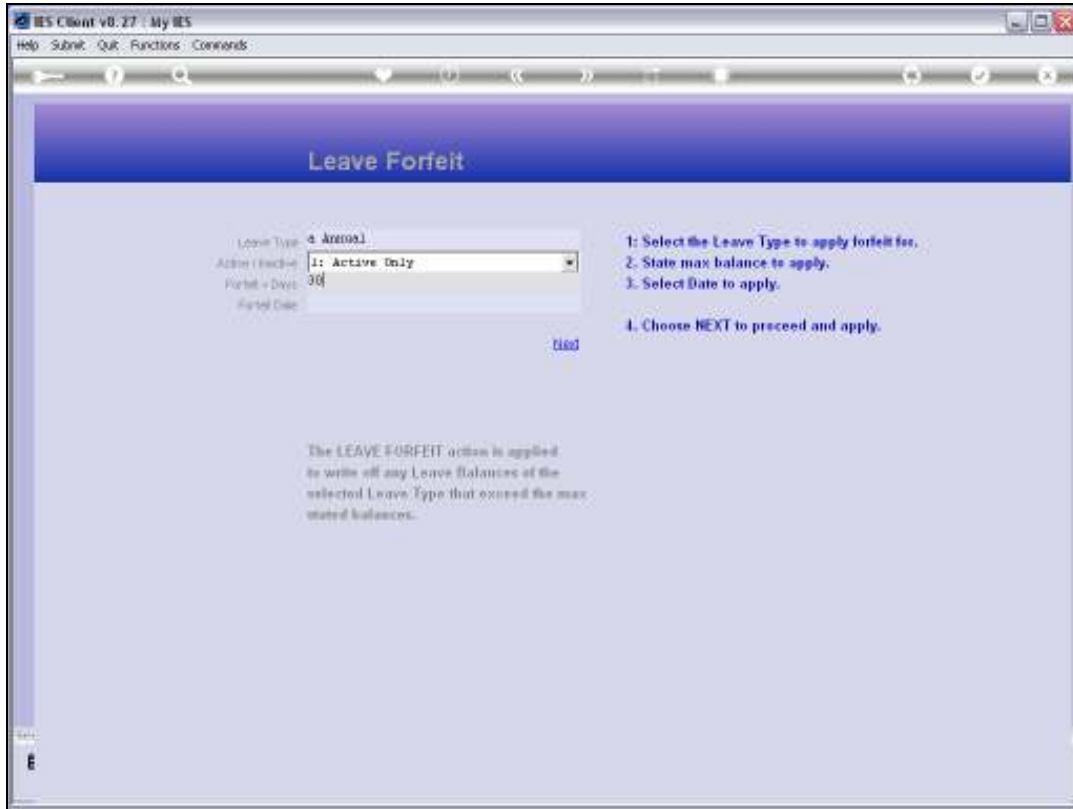
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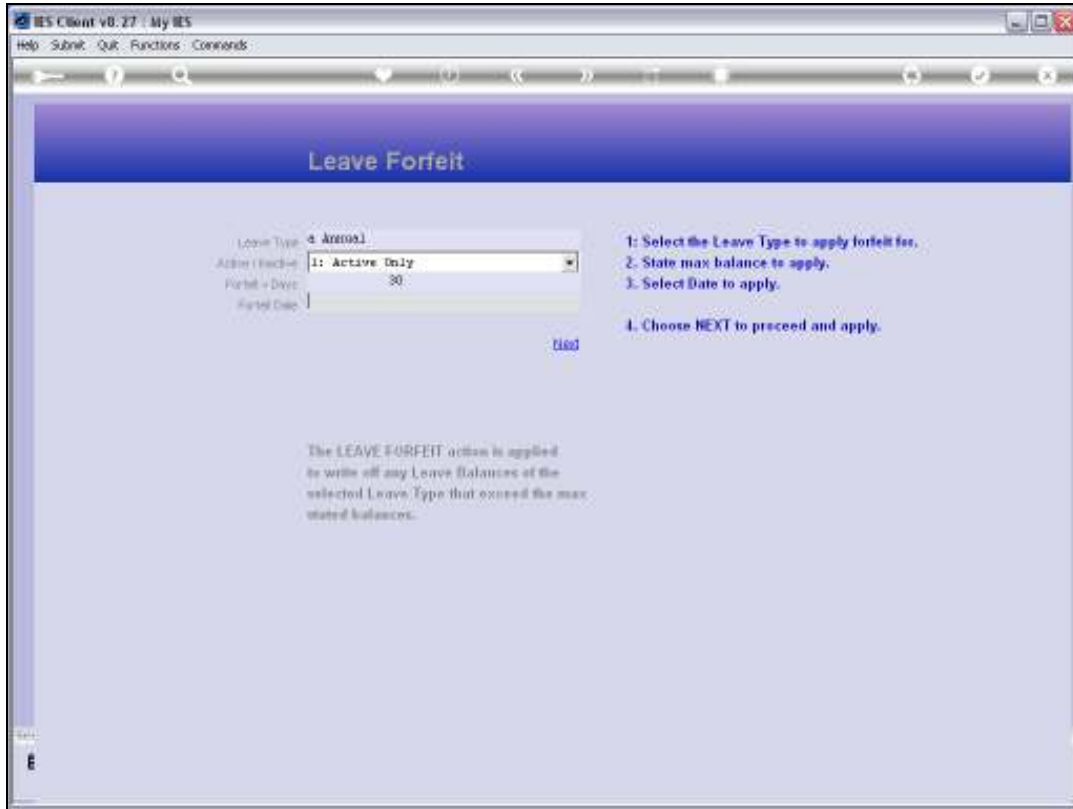
Slide notes: In this example, we will apply Leave Forfeit on Annual Leave, for which the Company has a policy that Leave Credit that exceeds 30 days may not be rolled forward to another year.



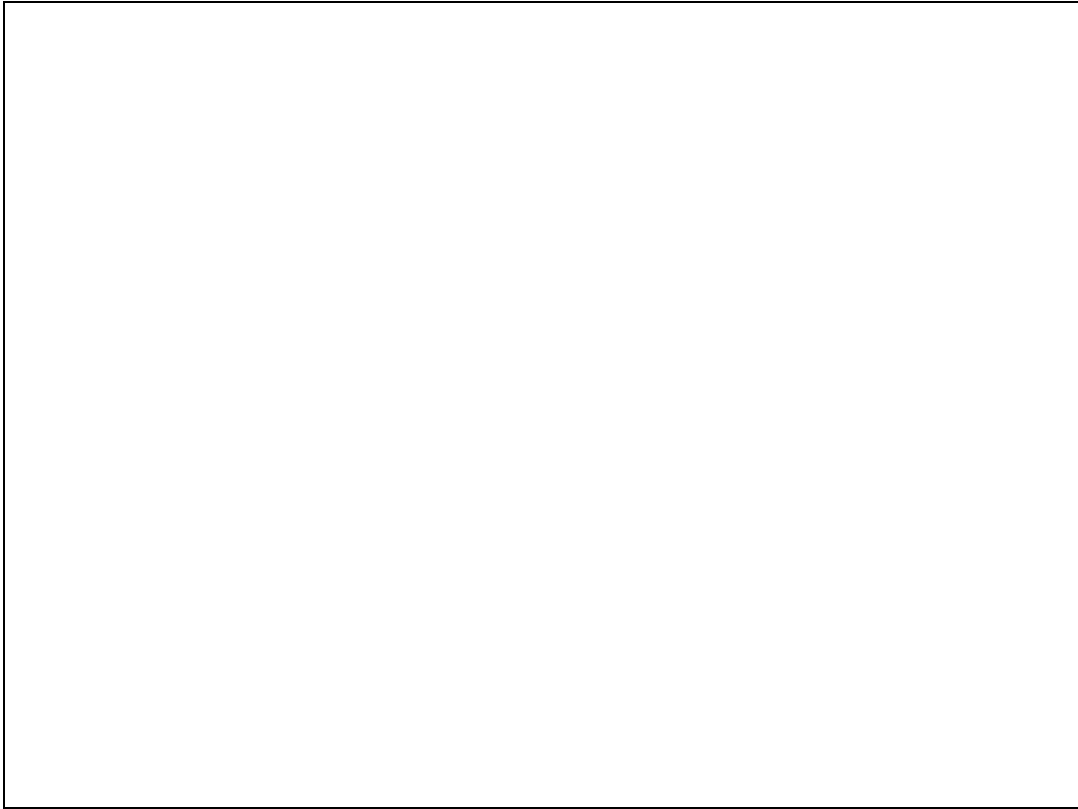
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Slide notes:



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Slide notes:

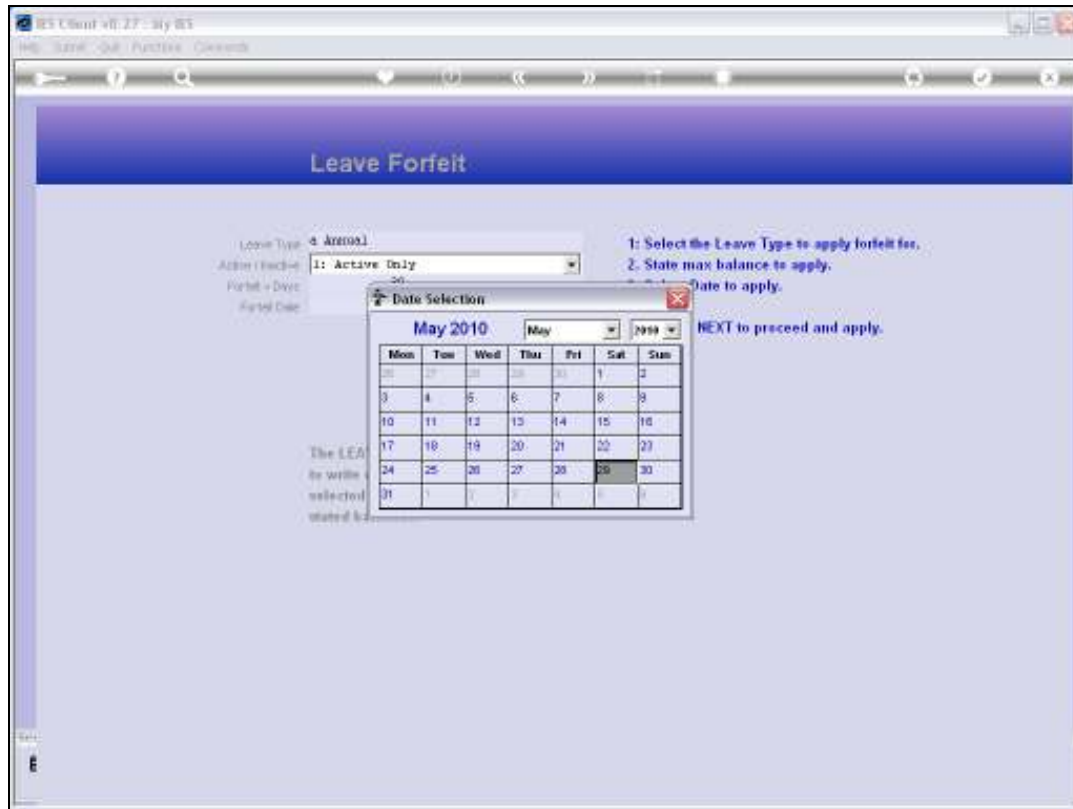


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Slide notes:



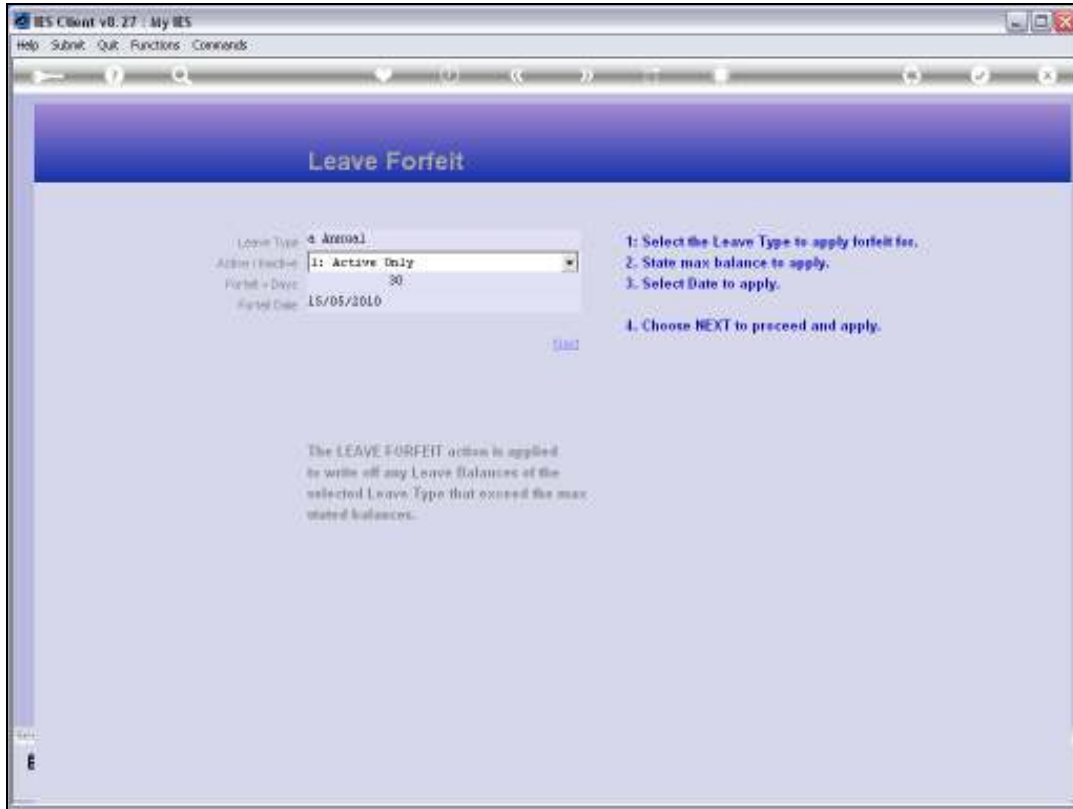
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Slide notes: The Date we select as the Forfeit Date is the Date at which the Employee Balance is calculated for the Leave Type we are applying, and if the Employee has a balance that exceeds the stated maximum, then it is adjusted, i.e. some leave is forfeited.

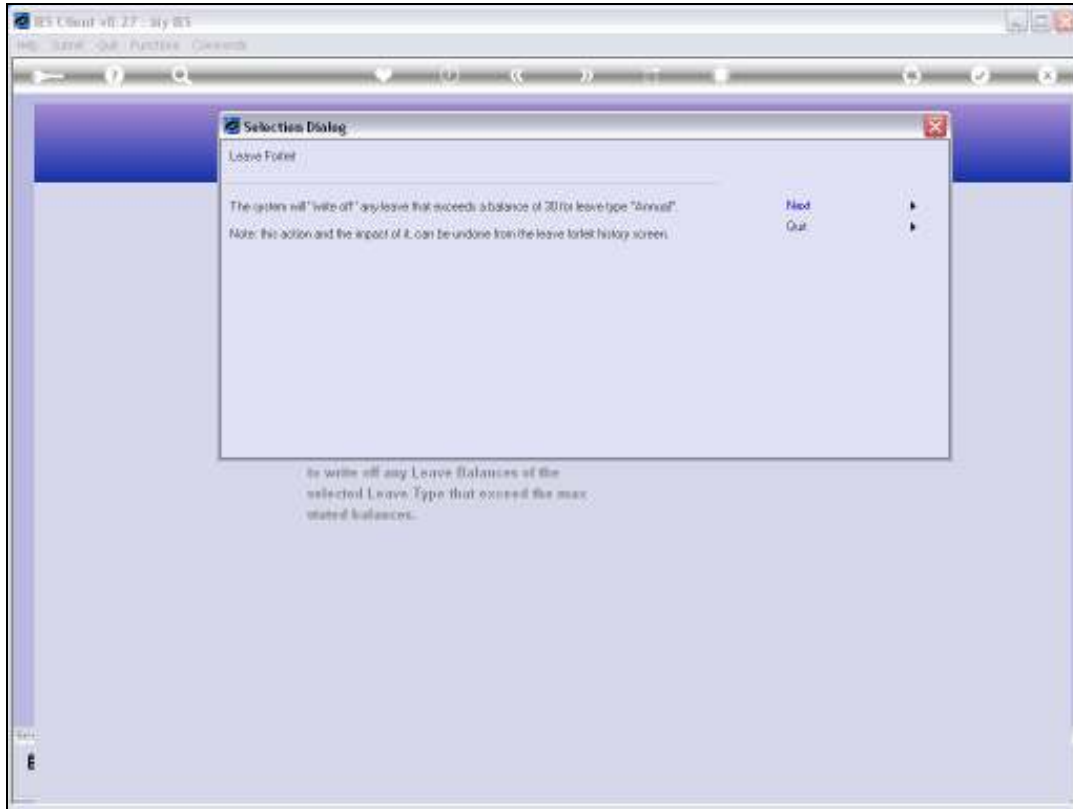


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Slide notes:



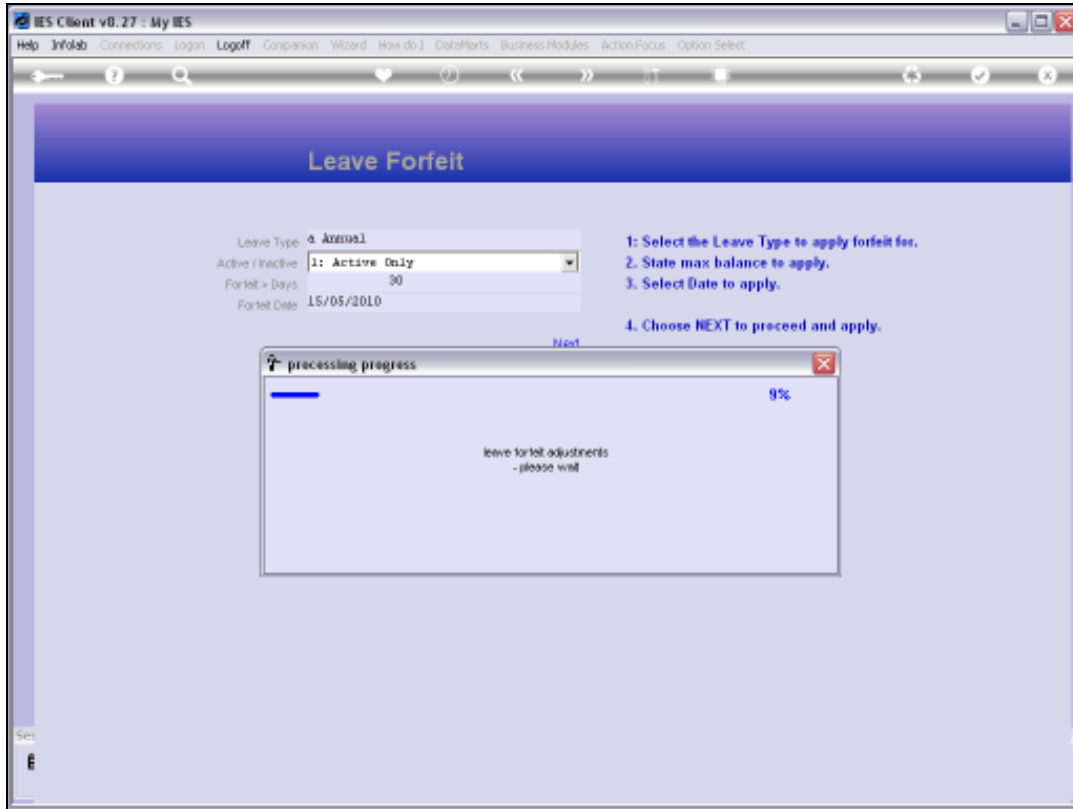
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Slide notes: Before performing the actual process, the system advises exactly what the parameters are, and that this action can be undone from the 'Leave Forfeit History' screen.



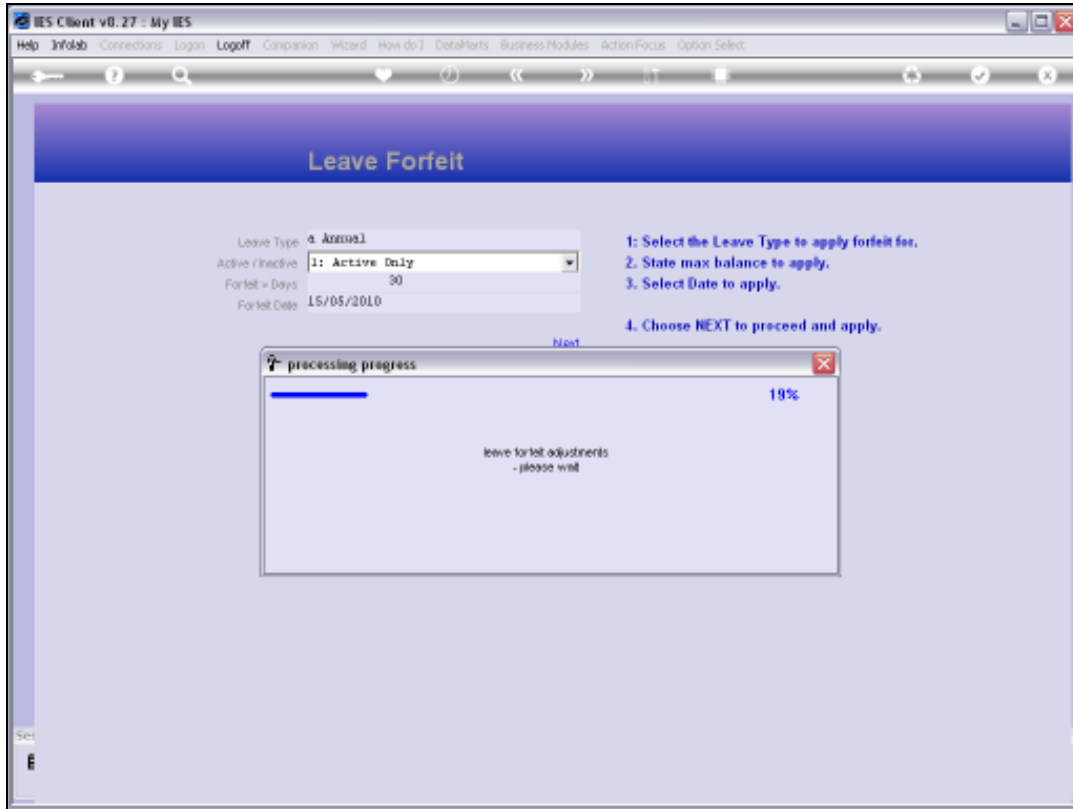
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Slide notes:



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Slide notes: Usually we will perform a Leave Balances Report as at the Leave Forfeit Date before and after performing the Leave Forfeit option, in order to verify that we are achieving the expected results. And if there is a problem, we can undo the action from the Leave Forfeit History screen, which is shown in a separate tutorial.