Monathly clearing

With the **monthly clearing**, the journals checked by the employees themselves are submitted to the executive staff for approval.

NOTIZ

The former list view **Monthly clearing**, in which the executive staff could clear the journals via the column "Approval", is no longer available. Today, the monthly clearing is done via a workflow directly in the **monthly journal**.

Procedure

- **Submission by the employee**
  Employees whose group has been enabled for the monthly clearing by the administrator see the button **Submit** in the monthly journal. Before submission, the system checks whether all criteria are fulfilled (e.g. period completed, journal of the previous period approved, no pending correction requests, no unexcused absences, no irregular events recorded by the time acquisition system). After submission, no further corrections can be requested for this period.
- **Approval by the supervisor**
  The supervisor receives a task (Workflow > open tasks) showing target time, actual time and balance of the employee for the respective month. The link **Open journal** leads to the monthly journal of the employee, where the month can be **Approved** or (with a decline reason) **Declined**.
- **Declined months**
  If a month has been declined, the employee can correct the journal and **Submit again**.

The status of the monthly clearing (**Submitted**, **Approved**, **Declined**) is shown in the monthly journal.

Depending on the configuration, the employee is reminded by e-mail and with an open task a certain number of days after the end of the month to submit the journal.