Monthly Clearance

With **Monthly Clearance**, the monthly journals checked by the employees themselves are submitted to the supervisor for approval.

NOTIZ

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

Process

- **Submission by the employee**
  Employees whose group has been enabled for monthly clearance by the administrator see the **Submit** button in the monthly journal. Before submitting, the system checks whether all criteria are met (e.g., period closed, journal of the previous period approved, no open change requests, no unexcused absences, no irregularities from the time recording system). After submission, no corrections can be requested for this period.
- **Approval by the supervisor**
  The supervisor receives a task (Workflow --> open tasks) with the target time, actual time and balance of the employee for the month in question. Via the **Open journal** link, he or she reaches the employee's monthly journal and can **Approve** the month there or (stating a reason for rejection) **Reject** it.
- **Rejected months**
  If a month was rejected, the employee can correct the journal and **Submit again**.

The status of the monthly clearance (**Submitted**, **Approved**, **Rejected**) is displayed 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 his or her journal.