Quick Guide concerning changes in employee conditions

1. **An employee is hired**
   a) Create new employee in **Basics > Organisation > Employees.**
      Fill in all basic information about the employee here, including information about the price categories, cost and sales prices of the employee. This requires an existing general price list, no more than 14 months old, which is marked as the main activation date.
   b) Fill in the conditions of employment. This defines overtime model, standard hours, holiday schedule and further training group, if necessary.
   c) If necessary, insert the employee on other existing project or project part price lists:
      Basics > Prices employee > Active price lists > New employee on the list
   d) Finally, holiday with/without pay is allocated in:
      Administration > Special Holidays > Holiday > draft for holiday with/ without pay

2. **An employee resigns**
   a) Create a resignation in **Basics > Organisation > Employees > Conditions of employment.**
   b) Check whether the employee has handed in the timesheet for the last day of employment. For example in **Administration > Dates for handing in**
   c) If the employee has holiday, special holidays or time off in lieu due, these groups must be reset. This is done in **Administration > Holiday Time off in lieu > Holiday/Special Holidays/Time off in lieu/SR1**.
   d) Finally, all check marks concerning access to programs on the employee card, and the status is set to closed.

3. **An employee changes pay**
An increase in pay affects the cost price of the employee and thereby possibly the sales price too. This change happens on a specific date.
   a) Create a new activation date in **Basics > Prices emp. > Create price lists**. Create activation date and activate it.
   b) Create a general price list for the new activation date, insert the employee on the price list and enter the new cost prices and, if necessary, sales prices. Activate it.
If the price list is created too late, hours should be recalculated in **Basics > Prices emp. > Active price lists**.

4. **An employee changes price category e.g. from junior to senior**
When an employee changes price category it will happen on a specific date. If there is already a correct activation date available, skip ahead to point a
   1. Go to **Basics > Prices emp. > New price list**, create and activate an activation date
   2. Select new price category for the employee on the completion list

3. Create a general price list, insert the relevant employee, activate the price list

   a) Go to **Basics > Prices emp > New price list**
   b) Complete existing date with new price category for the employee
   c) Go to **Basics > Prices emp. > Active price lists** and enter the new price

5. **An employee changes standard hours**
When the standard hours of an employee change, new conditions of employment must be created with the new standard hours. This is done in **Basics > Organisation > Employees**.
   a) Double–click on the employee, click on [Conditions of employment].
   b) Create new conditions of employment with starting date and the new standard hours
Recalculation of capacity and overtime balance will happen automatically.

6. **Changes in the holiday/time off in lieu groups of employees**
   a) Manual changes for holiday: **Administration > Holiday/time off in lieu > Holiday**
      Holiday with and without pay is allocated and edited here.
   b) Manual changes for special holidays: **Administration > Holiday/time off in lieu > Special holidays**
      Special holidays are allocated and edited here.
   c) Manual changes to the overtime groups: **Administration > Holiday/time off in lieu > Time off in lieu/SR1**
Please consult the holiday/time off in lieu manual for a more detailed review.

7. **Changes in the conditions for further training for employees**
An employee's right to further training is determined by the conditions of employment. The training group is also found here. Changes in the training group and the right to further training are made in new conditions of employment:
   a) Go to **Basics > Organisation > Employees**.
   b) Double-click on the employee, click [Conditions of employment].
   c) Create new conditions of employment with starting date and the new conditions for further training.

In the further training balance a need for manual adjustments may arise in the joint and separate group. For example if the funds for further training get too old or a previous employee is obliged to pay a share of a course or something similar.
   a) **Administration > Further training > Allocation > Dot in 'Adjustment'**