

# Overview Video

<https://www.youtube.com/embed/YJcu4TjRY5A>

## Step-by-Step Tutorial Guide

### Step 1: Open the Leave Policy Module

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, click on **Leave Management**.
3. Select **Leave Policy**.

The Leave Policy page displays all existing leave policies configured in the system.

### Step 2: View Existing Leave Policies

1. Review the list of available leave policies.
2. The table may display:
  - Policy Name
  - Leave Year
  - Applicable Employees
  - Status

- Actions

3. Use the search option to quickly locate an existing policy.

This helps administrators manage multiple leave policies from one location.

## Step 3: Create a New Leave Policy

1. Click **Add Leave Policy** or **Create Policy**.
2. The Leave Policy configuration page opens.

This page allows you to define the organization's leave rules.

## Step 4: Enter Basic Policy Information

Fill in the required details:

- Policy Name
- Leave Calendar Year
- Description (optional)

Use a descriptive name that clearly identifies the policy.

Examples:

- Corporate Leave Policy
- Factory Leave Policy
- Sales Team Leave Policy

# Step 5: Configure Weekly Off Settings

1. Select the organization's weekly off pattern.
2. Configure working days and weekly holidays.
3. Define any alternate weekly off rules if applicable.

These settings determine how weekends are considered during leave calculations.

# Step 6: Add Leave Types to the Policy

1. Navigate to the **Leave Types** section.
2. Click **Add Leave Type**.
3. Select the leave type from the dropdown.

Examples include:

- Casual Leave (CL)
- Sick Leave (SL)
- Earned Leave (EL)
- Comp-Off
- Maternity Leave
- Paternity Leave

Multiple leave types can be added to the same policy.

# Step 7: Configure Leave Allocation

For each leave type, define:

- Annual Leave Entitlement
- Monthly or Yearly Credit
- Opening Balance
- Maximum Leave Balance

These settings determine how leave is credited to employees.

## Step 8: Configure Leave Rules

Set the applicable leave rules, such as:

- Carry Forward Allowed
- Carry Forward Limit
- Leave Encashment
- Half-Day Leave Allowed
- Negative Leave Allowed
- Leave Clubbing Rules
- Leave Accrual Method

These rules ensure leave is managed according to company policy.

## Step 9: Configure Leave Restrictions

Define any restrictions applicable to the leave policy.

Examples include:

- Minimum Leave Days
- Maximum Leave Days per Request
- Advance Notice Requirement
- Backdated Leave Permission
- Probation Period Restrictions

These restrictions help standardize leave approval and usage.

# Step 10: Assign the Leave Policy

1. Select the employees who will be covered by the policy.
2. Assignment can typically be based on:
  - Department
  - Designation
  - Branch
  - Business Unit
  - Employee Category
  - Individual Employees

This ensures the correct employees receive the appropriate leave policy.

# Step 11: Review the Policy Configuration

Before saving, verify:

- Policy Name
- Leave Year
- Weekly Off Settings
- Leave Types
- Leave Allocation
- Leave Rules
- Employee Applicability

Ensure all settings are configured correctly.

# Step 12: Save the Leave Policy

1. Click **Save** or **Submit**.
2. Wait for the confirmation message.

The Leave Policy is successfully created and becomes available for employee assignment.

## Step 13: Edit Existing Leave Policies

If organizational requirements change:

1. Select an existing leave policy.
2. Click the **Edit** icon.
3. Update the required settings.
4. Save the changes.

This keeps leave policies aligned with evolving business requirements.

## Step 14: Manage Leave Policies

From the Leave Policy page, administrators can:

- View policy details
- Edit existing policies
- Activate or deactivate policies
- Assign or reassign employees
- Search and filter leave policies

Regular policy reviews help maintain accurate leave administration across the organization.

# Key Benefits of Leave Policy Management

- Centralized leave policy administration
- Flexible leave allocation rules
- Automated leave accrual and carry forward
- Department-wise or employee-wise policy assignment
- Better attendance and payroll integration
- Reduced manual leave management
- Improved compliance with organizational leave policies

## End of Tutorial

You have successfully learned how to configure and manage **Leave Policies** in the TankhaPay Business Portal. Properly configured leave policies help organizations automate leave administration, ensure policy compliance, and provide employees with a transparent and standardized leave management experience.

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