

Overview Video

<https://www.youtube.com/embed/zvXNXVzK-BM>

Step-by-Step Tutorial Guide

Overview

This tutorial explains how to use and manage the PMS (Performance Management System) module in TankhaPay. The walkthrough covers:

- Accessing the PMS module
- Creating performance cycles
- Setting goals and KPIs
- Managing employee appraisals
- Conducting performance reviews
- Tracking employee performance
- Generating performance reports

Step 1: Open the PMS Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **PMS** or **Performance Management System**.
3. Click on **PMS** to open the module.
4. The dashboard displays performance management options and review data.

This section helps organizations manage employee performance evaluations, goals, and appraisal processes from a centralized platform.

Step 2: View Performance Dashboard

1. On the dashboard, review performance-related information.
2. The dashboard may display:
 - Active Review Cycles
 - Pending Appraisals
 - Goal Completion Status
 - Employee Ratings
 - Review Deadlines
 - Performance Analytics
3. Use the dashboard to monitor organizational performance activity.

This provides managers and HR teams with real-time performance insights.

Step 3: Create a Performance Review Cycle

1. Click on **Create Review Cycle** or **New Appraisal Cycle**.
2. Enter performance cycle details.
3. Configure:
 - Review Cycle Name
 - Start Date
 - End Date
 - Applicable Employees
 - Review Type
4. Save the review cycle.

Performance cycles help organizations structure appraisal timelines and evaluation processes.

Step 4: Set Employee Goals and KPIs

1. Open the goals or KPI management section.
2. Create employee goals.
3. Configure:
 - Goal Title
 - KPI Description
 - Weightage
 - Target Value
 - Deadline
4. Assign goals to employees or teams.

Goal management helps align employee performance with organizational objectives.

Step 5: Assign Reviewers and Approvers

1. Configure the review workflow.
2. Assign:
 - Reporting Manager
 - Reviewer
 - HR Approver
 - Secondary Reviewer (if applicable)
3. Save the review hierarchy.

This ensures structured and transparent performance evaluations.

Step 6: Conduct Employee Self-Assessment

1. Open the self-assessment section.
2. Employees can review assigned goals and achievements.
3. Enter:
 - Accomplishments
 - Comments
 - Supporting Notes
 - Self-Rating
4. Submit the self-assessment.

Self-assessment helps employees participate actively in the appraisal process.

Step 7: Review Employee Performance

1. Managers open the employee appraisal form.
2. Review:
 - Goal Achievement
 - KPI Performance
 - Attendance and Productivity
 - Skill Development
 - Employee Feedback
3. Provide ratings and comments.

This helps managers evaluate employee performance comprehensively.

Step 8: Submit Appraisal Feedback

1. Enter manager feedback and recommendations.
2. Add:
 - Performance Comments
 - Strengths
 - Improvement Areas
 - Development Suggestions
3. Submit the appraisal review.

Constructive feedback helps improve employee growth and performance alignment.

Step 9: Track Appraisal Status

1. Navigate to the appraisal tracking section.
2. Review current appraisal progress.
3. Status indicators may include:
 - Pending
 - In Review
 - Submitted
 - Approved
 - Completed
4. Monitor completion timelines and pending actions.

This helps HR teams manage appraisal completion efficiently.

Step 10: Generate PMS Reports

1. Open the reports section.
2. Select the required performance report.
3. Apply filters such as:
 - Department
 - Employee Name
 - Review Cycle
 - Rating
 - Status
4. Generate and export the report.

Performance reports help management analyze workforce productivity and appraisal outcomes.

Step 11: Access Historical Performance Records

1. Navigate to historical appraisal records.
2. Review:
 - Previous Ratings
 - Past Review Cycles
 - Goal Achievement History
 - Feedback Records
3. Search records using filters when required.

Historical records help organizations track long-term employee performance growth.

Key Benefits of the PMS Module

- Centralized performance management
- Structured appraisal workflows
- Goal and KPI tracking
- Real-time performance visibility
- Transparent employee evaluations
- Better workforce productivity analysis
- Improved employee development and engagement

End of Tutorial

You have now completed the walkthrough of the TankhaPay PMS module.

The PMS module helps organizations efficiently manage employee appraisals, goal tracking, performance evaluations, feedback processes, and workforce development through a centralized performance management system.

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