PURPOSE

This policy is aimed to ensure that all employees involved in new employee onboarding will be well versed in the onboarding policy and processes and ensure that the onboarding objectives are met.

At the conclusion of the onboarding process the new employee will:
● be familiar with the new employee onboarding process.
● be familiar with PAYRETO policies and procedures.
● know PAYRETO's organizational structure.
● be familiar with their job description and have clear expectations of their role.
● have the tools, equipment and training needed for their job.
● feel welcomed, valued and a productive member of the team.

SCOPE

This policy applies to all new and/ or rehired employees of PAYRETO and to all stakeholders during the onboarding process.

DEFINITIONS

New Employee
● newly hired employee of PAYRETO, either full-time or part-time, permanent or project-based/contractual status.

New Intern
● This refers to all newly joined on-the-job trainees or interns.

Rehired Employee
● A former employee of Payreto who is eligible and qualified for an open position and was hired again in the company.

Stakeholder
● PAYRETO employees involved in the onboarding program.

New Employee Onboarding Plan and Website (for New Employee and Managers)
● The purpose of these tools is to help those involved in new employee onboarding identify what activities should be done, when it will happen and who will be responsible for them. This makes it easier to visualize how an onboarding program will work and less likely that any particular activity will be overlooked.

New Employee Orientation
● It is a classroom training that is done to educate all new employees about PAYRETO and share all core information needed to ensure that new employees will feel welcomed and acclimated to the organization.

New Employee Orientation Schedule
● It consists of the program flow of the New Employee Orientation.

New Employee Orientation Checklist
● It is a waiver that is signed by attendees right after the new employee orientation, this is also a checklist of the topics discussed during the orientation.

New Employee Orientation Survey Form

- It is a survey form filled out by attendees right after the new employee orientation to get their reviews and feedback for the improvements of the New Employee Orientation.

New Employee Onboarding Feedback Form
- It is a survey form answered by new employees during their sixth month to get their recommendations and feedback of their onboarding experience with Payreto.

GUIDELINES

1. New Employee Onboarding is divided into three stages, which are the following:
   1.1. *Preparation* – is the period before the new employee's start date that involves activities of all stakeholders in preparation of the arrival of the new employee.
   1.2. *Orientation and Integration* – includes activities that acclimate the new employee to the culture, team, work environment and introduce his/her to policies and procedures and online modules through the New Employee Orientation classroom training and department specific orientation.
   1.3. *Engagement & Follow up* – includes activities that aim to develop the new employee's company awareness, building relationships, meeting performance expectations and contributing to PAYRETO's success. It is also during this period where the effectiveness of the onboarding process is being measured.

2. As a condition of employment, all newly hired employees and interns are required to attend the New Employee Orientation on their first day of employment. New employees and interns are required to complete the New Employee Orientation session before reporting to their respective departments. Onboarding schedules of new employees who are significantly late or are not available for the New Employee Orientation will be rescheduled.

3. Returning employees are required to complete the New Employee Orientation upon rehire to ensure that they receive the most current company policies and procedures and other job-related information.

4. The management has the discretion to waive certain steps in the onboarding process depending on the previous qualification of the rehired employee/s (e.g. Core Payments Training, etc.) as deem applicable.

5. All stakeholders during the new employee onboarding process are expected to fulfil the roles and responsibilities assigned to them to ensure proper acclimation of all new employees to PAYRETO.

6. The Human Resources Department keeps all onboarding forms and documentation, copies of it are also kept in the new employee's 201 file.

7. Any amendments, additions or revisions of this policy and procedures are the sole discretion of the Human Resources Department as approved by the Management.

PROCEDURE

1. **Preparation**
   1.1. Human Resources & Administration
   1.1.1. Talent Acquisition finalizes the new employee's start date and cascades the information to all onboarding stakeholders.
   1.1.2. Pre-employment Checklist will be given to each new employee which involves the submission on or before the start date ofemployment with Payreto. In consideration for the employees who would request for an extension to submit some of the documents, below are the list of requirements that are negotiable (where new employees are given an allowance of up to 30 days to complete) and non negotiable(requirements that are strictly required on or before the start of employment):
      1.1.2.1. Non Negotiable
         1.1.2.1.1. 2 pcs 2X2 colored picture (white background)

      1.1.2.1.2.   2 pcs 1X1 colored picture (white background)
      1.1.2.1.3.   Birth Certificate (Photocopy only)
      1.1.2.1.4.   Marriage Certificate (Photocopy only if applicable)
      1.1.2.1.5.   SSS No. (SSS digitized ID or SSS E-1 Form) (Photocopy only)
      1.1.2.1.6.   HDMF number or copy of card
      1.1.2.1.7.   TIN No. (TIN Card or Tax Update Form) (Photocopy only)
      1.1.2.1.8.   Philhealth MDR Form or Philhealth Card (Photocopy Only)
      1.1.2.1.9.   Pre-employment Medical Examination-with Fit to Work remarks
      1.1.2.1.10.   2 Valid ID's (Photocopy)
      1.1.2.1.11.   In case of foreigner, please present your I-card/ACR
      1.1.2.1.12.   Other additional documents, at the discretion of HR
      1.1.2.1.13.   Government forms
          1.1.2.1.13.1.   HDMF Registration/Update/Transfer
          1.1.2.1.13.2.   Philhealth Registration/Update
          1.1.2.1.13.3.   SSS
          1.1.2.1.13.4.   Other government related form
      1.1.2.1.14.   Company forms:
          1.1.2.1.14.1.   Company ID Form
          1.1.2.1.14.2.   Employee Data Sheet
          1.1.2.1.14.3.   Other company forms required
    1.1.2.2. Negotiable
      1.1.2.2.1.   Valid NBI Clearance (Original Copy)
      1.1.2.2.2.   BIR Form 2316 from previous employer
      1.1.2.2.3.   Valid Community Tax Certificate (CTC) (Original Copy)
      1.1.2.2.4.   Company Clearance from previous employer
      1.1.2.2.5.   Acceptance Letter of Previous Company of resignation letter
      1.1.2.2.6.   Certificate of Employment from previous employer
      1.1.2.2.7.   Diploma/Transcript of Records from school
      1.1.2.2.8.   BIR form 2305 (New employee must process this personally)
      1.1.2.2.9.   BIR form 1905 (New employee must process this personally)
1.1.3. Talent Acquisition may give a reasonable grace period for the submission of some pre-employment requirement provided that there is a valid reason.
1.1.4. Failure or refusal to complete the requirements within the allotted period without justifiable reason shall subject the employee under disciplinary action.
1.1.5. Any existing loans of a newly hired employee will not be catered by Payreto. If a new employee has an existing loan before joining the company, he will be advised to settle the said existing loan on his own. Nonetheless, all existing employees of the Payreto who would like to apply for a loan will be assisted by HR for the processing.
1.1.6. After the new employee has signed the contract, Talent Acquisition sends the Onboarding email to the Immediate Supervisor, with the following details:
    1.1.6.1. Name of the employee
    1.1.6.2. Employee ID Number
    1.1.6.3. Position
    1.1.6.4. Start date
    1.1.6.5. Forms to be filled out by the immediate supervisor:
      1.1.6.5.1.   Office Supplies Request Form
      1.1.6.5.2.   Employee IT/Access Request Form
      1.1.6.5.3.   Training Request Form
      1.1.6.5.4.   L&D Playbook
1.1.7. A copy of the Onboarding Planning tool will also be sent to the stakeholders through email as a guide for the tasks to be completed during the onboarding of the new employee.
1.1.8. Talent Acquisition team coordinates the new employee orientation schedule and confirms onboarding roles & responsibilities with the Hiring Manager, HR & Admin,, IT and other stakeholders.Once finalized, TA will send the New Employee Orientation Schedule to all attendees/speakers.
1.1.9. With the consent of the new employee, TA sends a welcome announcement via chat platform and bulletin board.

1.1.10. Admin Team identifies new employee's office location/workstation and other office equipment if needed.

1.1.11. Admin Team prepares office supplies, welcome kit, pedestal key and emergency kit once a request is received from the Team Leader/Manager. Arrange for parking, if needed.

    1.1.11.1. For work from home set up, Talent Acquisition coordinates with the IT Support to provide the equipment needed by the employee.

    1.1.11.2. IT coordinates and delivers the Laptop with complete accesses to the employee's address before his start date.

1.1.12. Stakeholders shall update all the items and HR-related accesses given to the new employee in email such as but not limited to:

    1.1.12.1. Identification Card

    1.1.12.2. Health Card

    1.1.12.3. ATM Card

    1.1.12.4. Access to Salarium

    1.1.12.5. Access to Learning Management System (LMS)

    1.1.12.6. IT equipment

    1.1.12.7. Credentials (Email, skype, PC Login, etc.)

1.2. IT Support

1.2.1. Prepare all IT equipment, peripherals and access needed by the new employee.

1.2.2. Block off time to facilitate the New Employee Orientation for IT.

1.2.3. Provide access to various software/applications/websites such as Facebook, Google Drive, ABT, Confluence (if needed), SharePoint etc.

1.3. Team Leader/ Manager

1.3.1. The manager prepares for the employee's arrival prior to the employee's first day. This may include briefing the existing work group about the new member, securing appropriate resources, ensuring that the workstation is ready etc.

1.3.2. Block off time to spend with employees.

1.3.3. Request authorizations various software/applications/websites such as Facebook, Google Drive, ABT, Confluence (if needed), SharePoint etc.

1.4. New Employee

The new employee completes the pre-employment process through the Human Resources, which includes but not limited to the following:

1.1.1. Submission of pre-employment documentary requirements and pre-employment medical exam.

1.1.2. Filling up of company and government related forms.

1.1.3. Photo capture for company ID.

2. Orientation and Integration

2.1. New Employee Orientation

The following are the topics that should be discussed by different departments (HR and IT) during the New Employee Orientation.

2.1.1. HR and Admin Orientation

    2.1.1.1. HR Team to discuss key policies and other existing company policies (e.g. dress code, clean-desk policy, leave policy and coverage, travel, health benefits, overtime etc.). The following topics are discussed during the New Employee Orientation:

        2.1.1.1.1. Company Overview

        2.1.1.1.2. General Policies and Procedures (HR & Admin)

        2.1.1.1.3. Recruitment and Onboarding Policy

        2.1.1.1.4. Career and Personnel Development

        2.1.1.1.5. Compensation and Benefits Policy

        2.1.1.1.6. Overview of payroll procedures, cash advance, reimbursement and Liquidation procedures and Departmental Budget request, if applicable

        2.1.1.1.7. Code of Conduct

2.1.1.2. HR/Admin Team to introduce new employees to department staff and all colleagues during an office tour and discuss the organization plan: different departments, who is the manager, who is responsible for what and who are the contact persons for other departments.

2.1.1.3. New employees receive a COMPANY POLICY AND GUIDELINES - EMPLOYEE'S HANDBOOK during New Employee Orientation. This handbook contains detailed information about company overview, policies and procedures, etc.

2.1.1.4. New employees fill up and sign a New Employee Orientation Checklist, this is to document his attendance of the new employee orientation and to sign an acknowledgement form listing the topics covered and documents received. This form becomes part of the new employee's 201 file.

2.1.1.5. New employee answers the New Employee Orientation Survey Form.

2.1.2. Information Technology and Security Orientation

The following topics are discussed by IT Team during New Employee Orientation

2.1.2.1. Information Security Awareness & Security Policy

2.1.2.1.1. Including the discussion of the General Data Regulation Protection

2.1.2.1.2. Right after the discussion, Talent Acquisition will send the Declaration form for signing to the new employees.

2.1.2.2. B.Y.O.D Policy (Bring Your Own Device)

2.1.2.3. Novanet Usage Training (VOIP Phone System) – this depends on the position / need

2.1.2.4. PAYRETO Allowed Software/Program Orientation

2.1.2.5. Office access registration (biometrics)

2.2. Departmental-Specific Orientation

2.2.1. Team Leader/Manager meet with the new employees to review department and position-specific expectations and requirements.

2.2.2. Departmental orientation topics may include, but are not limited to:

2.2.2.1. Department Staff and Tour

2.2.2.2. Job Description and Performance Evaluation/Job Standards

2.2.2.3. Departmental Procedures and Guidelines

2.2.2.4. Additional Training and Department Requirements

2.2.3. Department Managers, together with the HR Department, will devise an employee development plan to each newly hired employee. Please see "Employee Development Plan Policy & Procedures" for more details.

2.2.4. If an employee's duties change substantially (including, but not limited to, transfer, promotion, demotion, or reclassification), the manager orients the employee to the new assignment and reviews applicable policies and procedures.

3. Engagement & Follow up

3.1. New Employee Engagement Activities - Team Leader/Manager ensures that new employee will be included on various company and department engagement activities such as but not limited to the following:

3.1.1. Lead team/department meetings.

3.1.2. Make a presentation.

3.1.3. Join company events and activities planning committees.

3.1.4. Facilitate and/or participate in team building exercises.

3.1.5. Spearhead and/or join company wellness activities.

3.2. Employee Performance Evaluation- All employees have the right to fair and objective evaluation. Procedures of the Performance evaluation may be referred to the Performance Management Policy.

3.2.1. KPI shall be discussed and set on the beginning of the employee's engagement as a basis of evaluation.

3.2.2. Monthly evaluation is required for probationary and project based employees.

3.2.3. Quarterly and Annual Evaluations are being conducted for regular employees.

3.3. Tracking of Onboarding

3.3.1. To track the completion of the new employee's onboarding in a timely manner, Talent Acquisition sends a copy of the Onboarding Planning Tool to the immediate supervisor and other stakeholders before the start date of the new employee. The Onboarding Planning tool tracks the support, tools and equipment needed by the employee during his onboarding and their timeline.

3.3.2. After the first week of the new employee, Talent Acquisition sends the google sheet file to the immediate supervisor and other stakeholders to ensure that the onboarding plan is being followed and if all the support, tools and equipment needed by the new employee is being provided.

3.4. New Employee Onboarding Process Review - During this period, the onboarding process, it's policies and procedures, is also being measured for its effectiveness and relevance in acclimating a new employee to the organization.
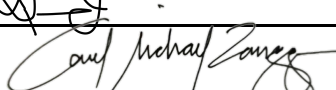
3.4.1. HR Dept. will gather all results and feedback from new employees through the New Employee Onboarding Feedback form.

SUPPORTING DOCUMENTATION

1. New Employee Onboarding Website (Managers -https://sites.google.com/payreto.eu/newemployeeonboardingfmanagers/home)
2. New Employee Onboarding Website (Employees - https://sites.google.com/payreto.eu/newemployeeonboardingemployee/home)
3. New Employee Orientation Schedule
4. New Employee Orientation Checklist
5. New Employee Orientation Survey Form (https://goo.gl/forms/BJHE8wIUzZsNNAi52)
6. New Employee Onboarding Planning Tool
7. New Employee Onboarding Feedback Form (https://goo.gl/forms/R0v8I0PvTzP74j7k2)

RELATED POLICIES

1. Performance Management Guidelines

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