CATERPILLAR ONBOADRING FORM GUIDANCE

**Review Version**

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| Anandakrishnan Gopalakrishnan | Elancheziyan Gajendran | 22- Feb- 2022 | Initial draft |
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# INTRODUCTION

This document is guidance for the associates to complete the onboarding forms without any hassle, who will be joining **CATERPILLAR** account after successfully completing their interview for the respective project.

Once after successful clearance next step will be resource onboarding. For onboarding the resource its mandatory to get the client Id. In terms of getting the ID creation each resource to successfully complete the **Client Onboarding Forms.**

# Mandatory details Required before filling the document

## Know your Reporting Manger/lead Name

Its mandatory to get to know your Reporting Manger name from the Caterpillar end so that it will be filled in the required sheets. **New Joining Information excel**

## Location details (if direct to Caterpillar)

In case employees who are going to work on the Caterpillar location its mandatory to know the current work location, so that this can be filled in the **New Joining Information excel**

NOTE- If you are not sure with the Reporter name/Location you can contact your interviewer to get the information

# List of Onboarding forms

Following are the list of different forms that will be shared with the resource by the onboarding team, mandatory to complete it and share it back to them for the further processing.

Text

Description automatically generated with medium confidence

## NHF-2020 excel

In this sheet we request to fill you the following section

* National ID Information
* Contact Information

Table

Description automatically generated with medium confidence

Under this section fill your current location address

* Job Data/ Work location

In this section, associate required to fill only the following fields after getting the required information as mentioned in the heading ‘Mandatory details required’

Table

Description automatically generated with medium confidence

Fields to be filled by associates:

Location

Supervisor name/PS ID#

Note – Remaining fields can be the same as mentioned in the sheet.

## New Joining Information excel

In this excel the associate to fill the basic details as per the row information.

Following fields are required only:

* Full name of the candidate
* Mobile Number
* Team Leader Name (refer heading – Mandatory details required)
* Location of work (refer heading – Mandatory details required)
* Blood group
* Emergency contact name and Number
* Years of Experience

Note – Remaining fields can be same as the template sheet.

# Candidate Assessment sheet\_CAT

In this document its required to complete the below section by each resource

Table

Description automatically generated

Next section under General question fill the following questions ( 1, 3 to 11)

Complete the following section as well B, C , D

A picture containing bar chart

Description automatically generated

# Associate signature for the word documents

Apart from the above mentioned forms its mandatory for the associate to acknowledge the following documents by providing their signature by physically printing out the document and sign & scan back.

NDA, NCA, Agency Employee Instructions, BGV Affidavit, Electronic communication

Note – If in case the employee is unable to print the document (due to WFH) then user can convert all the documents to PDF and digitally sign it.

**Follow the below steps to achieve the digital signature**

## How to convert PDF

Open the word document and print it using (control + P) or Print option

Graphical user interface, application, Word

Description automatically generated

Select the Printer dropdown as **Microsoft print to PDF** and Then save it in required path in your system.

## Insert Digital Signature

Open the **PDF** as **adobe** software, that you have saved as part of the previous step.

Graphical user interface, text, application, email

Description automatically generated

Under **Menu** select as **Sign** -> **Fill & sign**

The below section will be displayed.

Application

Description automatically generated

Select **Sign** **yourself** 🡪 **Add Signature**

Graphical user interface, text, application

Description automatically generated

You can write your name to convert to signature or select other two options (**Draw** or **Image**) to insert your signature.

# Additional details including the above forms

Once the associate successfully completes all the above steps and done with the forms filling and signature its mandatory to share the following details to the onboarding team.

1. Aadhaar number and PAN or DL screen shot to be attached
2. White background photo to be attached (We suggest you go to photo studio and take clear white background photo)
3. Updated profile/Resume.
4. Update on the status of the background verification in 1C for Caterpillar (Check your CTS mailbox for the additional documents if in case required from HR team to process with the BGV verification for caterpillar account)

Once the associate successfully shared the document with the additional details to the onboarding team. Kindly verify the CTS email from TPL team for the onboarding session.