

GENERAL HOUSEKEEPING REMINDERS

(Updated 02/17/20)

LOCK your desktop

You must LOCK your desktop when you are away from your desk

CLEAN DESK POLICY

Please put away any/all documentation that contain ANY borrower information. You are not permitted to leave this information out overnight. All reports, approvals, any notes/note pads that contain the borrower's name/loan # should be out of sight at the end of each day. Do not leave any items with borrower's info on your desk when you leave for the day. **Place items in SHRED BINS not in trash cans.**

**Be sure to remove any approvals that you have printed. Random MONTHLY COMPLIANCE walk throughs are completed. Employees not following the clean desk policy will be identified during our Compliance meeting. Employees who continue to be flagged may be subject to disciplinary action.*

"Reception" will send communication if you need to completely LOG OUT and SHUT DOWN so be sure to follow the instructions outlined in the email communication.

Monthly Company Meeting held near UW Department @ 11:45am

****DO NOT BE LATE****

**MVP announcements; Company update*

Hourly Employees: You must take your lunch 30 MINUTES prior the start of the fifth hour of work. You are NOT at any time permitted to "work off the clock". You may not begin working until your scheduled start time. OT requests must be submitted and approved by management BEFORE you begin working any OT.

**Employees who fail to clock out for lunch as prescribed above and incur a MEAL PENALTY may be subject to disciplinary action.*

Break Periods – (2) Ten Minute breaks; place your ON BREAK sign at your desk; check with your department manager to determine if there are assigned break periods within your department.

Sign In/Sign Out

It is MANDATORY that you use the sign in sheet at the front desk when...

- ARRIVE and LEAVE FOR THE DAY *****ARRIVE at least 5 to 10 minutes before your start time***
- DO NOT CLOCK IN prior to your start time; DO NOT begin working prior to your start time
- LEAVE THE OFFICE FOR LUNCH and RETURN TO THE OFFICE FROM LUNCH
- You must also use Paylocity to log in hours; **NO WORKING OFF THE CLOCK PERMITTED**
- Any OT must be pre-approved by Management

Contact HR Dept and your DIRECT SUPERVISOR(S) IF you are arriving late/out sick

Time-Off Requests must be submitted through Paylocity; it is recommended that you communicate with your department manager relative time off requests being submitted. We need to ensure that we have adequate coverage. **DO NOT PURCHASE** "tickets" (flight, cruise, etc.) for vacation not yet approved.

**Time off requests submitted during November – January 2nd will require Executive Management approval. Department managers are not permitted to approve vacation time off during this time*

period. Requests should be submitted in Paylocity so that we can access who/how many employees are requesting time off.

Out to Lunch/On Break Signs

Please place your OUT TO LUNCH or ON BREAK sign on your keyboard or placed over your computer monitor.

Conversation Log (BYTE PRO)

You can copy/paste detailed notes into the Byte Pro Convo Log, however, be sure to add a final note with a “snapshot comment” regarding file status as this is what will appear on your pipeline report
“If it isn’t written down, it never happened”

BEFORE LEAVING – REVIEW OPEN TASKS; identify any aged tasks to your Department Manager

****document the convo log as to why a task could not be completed***

Glassware

The glassware in the kitchen is for CSC guests. Please bring your own cup/glass to use.