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Company Manual for Remote Virtual Assistants

Empowering Virtual Assistant Success



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PART 1: INTRODUCTION

WELCOME NOTE

Dear Team,

We are delighted to welcome you to Consultare Inc Group, and we extend our warmest greetings as you embark on this exciting journey with us. As a valued member of our Remote Virtual Assistant team, you play a crucial role in contributing to our shared success and maintaining the high standards we uphold.

Consultare Inc Group is a compliance company that is committed to excellence, innovation, and collaboration. Our mission is to provide top-notch virtual assistant services while fostering a supportive and inclusive work environment. We believe in the power of a united team to achieve remarkable outcomes.

As a Remote Virtual Assistant, you are an essential part of our team. Your skills, dedication, and enthusiasm will contribute significantly to the success of our clients and the growth of our company. We are confident that your talents will enhance our team's capabilities and drive us towards new heights.

To help you seamlessly integrate into our work culture, we encourage you to thoroughly review the contents of this Company Manual. This comprehensive guide outlines our policies, procedures, and expectations, providing you with a clear understanding of how we operate and what is expected from you.

We are committed to fostering an environment that promotes mutual respect, growth, and success. Your success is our success, and we are here to support you every step of the way. If you ever have questions, concerns, or ideas, don't hesitate to reach out to your team lead or our Human Resources department.

In our remote setting, communication is key. Stay connected with your fellow team through our designated communication channels. Join in team discussions, share your insights, and be an active part of our vibrant community.

Thank you for choosing Consultare Inc Group as your workplace. We are confident that your time with us will be both fulfilling and rewarding. Together, we will achieve great things.



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Welcome message from the CEO

On behalf of the entire Consultare team, I am delighted to extend a warm welcome to you as our newest member! We are thrilled to have you on board and look forward to the positive contributions we know you will make to our team.

Starting a new journey with a company is an exciting and significant moment, and we are here to support you every step of the way. At Consultare Inc Group, we value innovation, collaboration, and a commitment to excellence. We believe that our collective efforts contribute to the success of our organization and create a positive and dynamic work environment.

As you embark on your new role, you'll find a team dedicated to achieving our shared goals. Whether you are inquiring, learning, or contributing your unique skills, your presence adds tremendous value to our workplace.

Please feel free to reach out to if you have any questions or if there's anything you need assistance with.

Once again, welcome to the Consultare family! We are excited to have you with us and look forward to achieving great things together.

Best regards,

Arnel Ryan

CEO, Consultare Inc Group



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Our Company

We are a Texas-based company with international operations in Asia, Latin America, North America, Europe, and Africa. We specialized in regulatory, accreditation, certification, quality management system software, IT solution consulting and development, and other General Administrative Services.

Consultare Inc Group started as Nutripro LLC in December of 2013. In December 2017, our name was changed to Consultare Inc. The name Consultare came from the Spanish word “Consultare” in English “I will consult”. In January of 2023, the company was formally changed to **Consultare Inc Group**.

Consultare Inc. Group provides regulatory compliance and consulting services to manufacturers, distributors, and importers of foods, beverages, dietary supplements, drugs, cosmetics, medical devices, or electronic products. We contribute to a company’s growing Regulatory and Certification Compliance, Food Safety Management System, Quality System, Quality Management System, and HACCP development, implementation, maintenance, and monitoring on a full-time consultancy position.



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Our Mission

Consultare Inc Group mission is to redefine the remote virtual assistant services through the integration of compliance and IT development. We provide businesses with highly skilled virtual assistants who not only excel in administrative support but also adhere to the highest standards of regulatory compliance and data security. We commitment is to empower our clients with efficient, scalable, and secure virtual assistance solutions that drive productivity and streamline operations. Through continuous innovation and a client-centric approach, we strive to be the trusted partner in remote assistance, offering tailored solutions that elevate businesses in the digital era. We believe in the power of technology, compliance, and collaboration to shape the future of remote support services.



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OUR VALUES

Consultare Inc Group promotes values that are fundamental beliefs and guiding principles that shape the culture, behavior, and decision-making of the company. These values represent the core that define how a company and its employees operate. And most importantly, these values serve as a compass, influencing the company's identity, strategy, and relationships with stakeholders.



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I CARE VALUES

I Integrity and Innovation

C Compliance Excellence

A Accountability

R Respect and Responsibility

E Education and Empowerment



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I

Integrity and Innovation

INTEGRITY

adherence to ethical principles, honesty, fairness, dedication and commitment, selflessness. It's doing the right thing all the time, every time.

INNOVATION

Implementation of new idea approaches to compliance challenges and to seek a solution to meet evolving regulatory requirements.

C

Compliance Excellence

A priority to support the quality, safety, environmental, security and regulatory objectives of a company. This involves the application of continuous improvement, the elimination of waste and variability, and most importantly the reduction of risk.

A

Accountability

Holding oneself and others accountable for the compliance effort and taking responsibility for the actions and decisions.

R

Respect and Responsibility

Respect

Respecting the rights and interest of all members and collaborators. As well as building and maintaining a positive relationship with the clients, regulatory body, and the community.

Responsibility

We aim for the company and organization to operate in full compliance with legal regulations and industry-specific guidelines. We monitor the internal policies and bylaws. In the event of regulatory risks or misconduct, we aim to address concerns and find solutions to these challenges.

E

Education and Empowerment

Empowering our Team and clients through education on compliance and regulatory matters and by facilitating a culture of accountability, awareness, and knowledge.



PART 2: REMOTE VIRTUAL ASSISTANT TERMS

1.1 About this Manual

The Consultare Inc Group Remote Virtual Assistant company manual is a comprehensive guide that has been carefully designed to provide our team members with the necessary information, guidelines, and the best practices of delivering exceptional remote virtual assistant services while maintaining compliance and cutting-edge IT development.

This Virtual Assistant Manual contains information about the Virtual assistant policies and procedures of the Company. We expect each Virtual Assistant to read this carefully. It is a valuable reference for understanding your role and responsibilities and the Company.

The policies outlined in this Virtual Assistant Manual should only be regarded as management guidelines. A developing business will require changes from time to time. The Company retains the right to make decisions involving employment to complete its task in a manner that benefits the Virtual Assistant and the Company.

This Virtual Assistant Manual supersedes and replaces any and all prior Virtual Assistant Manual and any inconsistent verbal or written policy statements. The Company reserves the right to modify its policies and procedures.

1.2 Purpose of this Manual

The company manual for remote virtual assistants plays a crucial role in providing guidance, establishing consistency, and fostering a positive and productive remote work environment. It serves as a comprehensive reference tool for virtual assistants throughout their contract of employment.

1.2.1 To provide a clear guidance on the roles and responsibilities, and expectations of remote virtual assistants. This will help them understand their tasks, performance expectations, and how to contribute to the success of the company.

1.2.2 To provide a resource during the onboarding process for new virtual assistants to learn with the company's culture, policies, and procedures. This will ensure a smooth transition into their roles to make them productive quickly.

1.2.3 To establish a consistent set of guidelines and standards for operating procedures which is crucial for maintaining uniformity in work processes and ensure all virtual assistants follow the same set of rules and procedures.

1.2.4 To address standard policies related to remote work, such as working hours, time zone, flexibility, and other guidelines that are relevant to a remote virtual assistant work environment.



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1.2.5 To provide information about technology infrastructure, software, and tools that virtual assistants need to use. This includes guidelines on setting up and troubleshooting common issues with the tools essential for their task.

1.2.6 To emphasize the importance of data security and confidentiality. To outline procedures and best practices for handling sensitive information in a remote setting to help maintain the company's integrity and trust.

1.2.7 To communicate performance expectations and how feedback will be provided. To help virtual assistants understand how their work will be evaluated and provides a framework for professional development.

1.2.8 To be able to facilitate prompt response on what steps to take and who to contact for any challenges that may arise during remote work such as technical issues, emergencies, or unexpected circumstances.

1.2.9 To provide information on benefits, resources for well-being, and support services which demonstrates the company's commitment to the health and happiness of its remote workforce.

1.3 Changes to the Policy

We reserve the right to change, cancel, suspend, or dispute, with or without warning, all or any part of these policies, rules, regulations, procedures, and benefits at any instance. However, Virtual Assistants will be informed if any changes have been made.

Changes will be effective on the dates decided by the Company. When the changes take effect, previous policies will be voided.

1.4 Virtual Assistant Forms

The Virtual Assistants at CIG needed to fill out the following forms:

1.4.1 Virtual Assistant Manual acknowledgment form

The Virtual Assistant Manual contains information, rules, regulations, wages, and other important company guidelines. This is to verify that you understand Consultare Inc Group policies.

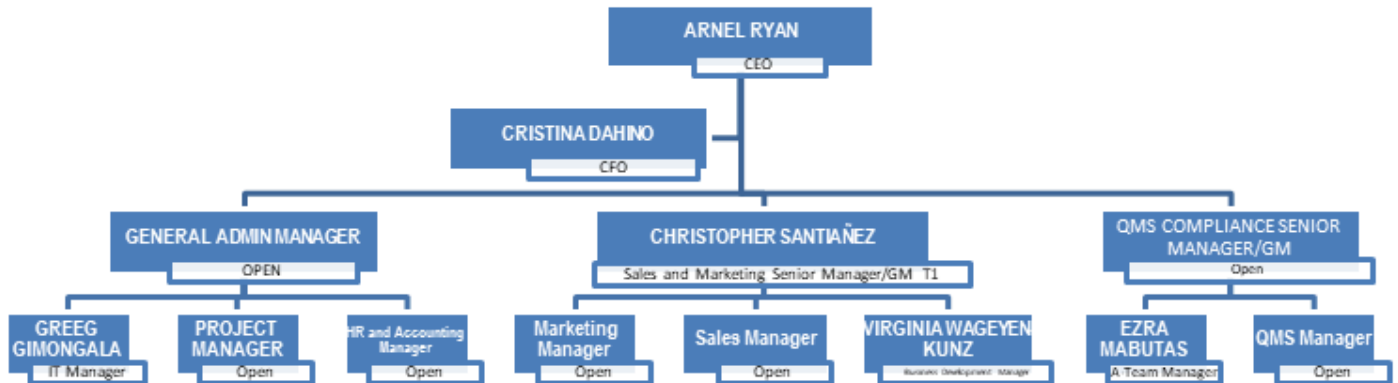


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1.5 Organizational Chart

1.5.1 Consultare Inc Group Team/Management Team





PART 3: VIRTUAL ASSISTANT TERMS

3.1 VIRTUAL ASSISTANT APPLICATION

3.1.1 It is crucial for Consultare Inc Group (CIG) to rely on accurate information during the hiring process to make informed decisions and maintain the integrity of the company. Falsification or misrepresentation on the Virtual Assistant application can lead to consequences, including prohibiting the candidate from joining the company or potentially leading to termination of the VA contract if such inaccuracies are discovered after hiring.

3.1.2 Ensuring candidates provide truthful and accurate information helps maintain trust and transparency within the company. It also helps safeguard against potential risk associated with hiring individuals who may not meet the required qualifications or standard.

3.2 TYPES OF VIRTUAL ASSISTANT

3.2.1 Full Time Virtual Assistants are contract virtual assistants who work eight (8) hours per day or forty (40) hours per week, Monday through Friday.

3.2.2 Part-Time Virtual Assistant are working students assigned to specific departments, dedicating 20 hours per week, Monday to Friday.

3.2.3 Freelancer are Virtual Assistant that are given task based projects.

3.2.3.1 IT Freelancer task is based on project based hours approved by the IT Manager.

3.2.3.2 Freelance Writer task performance is based on project hours evaluated and approved by the QMS Manager.

3.2.3.3 Freelance Video Editors tasks are based on a bundle (YouTube video, shorts, reels) provided by the Marketing Team and approved by the Business Dev Manager.

3.2.3.4 Freelance Video Editor task is based on projects based hours provided and approved by the CEO and Marketing team.

3.3 RECRUITMENT AND ONBOARDING

3.3.1 The HR coordinator initiates the recruitment process by sourcing applicants from various hiring platforms such as Online Job PH, Facebook, and Virtual Staff PH.

3.3.2 Resumes and CVs are meticulously evaluated based on the applicant's experience and skills. Qualified candidates receive an email invitation for the initial interview conducted by the initial recruitment team.

3.3.3 If the applicant successfully passes the first interview, they are invited for a second interview, which includes the department manager and the HR manager.

3.3.4 Upon passing the second interview, the HR department proceeds to send an offer letter to the applicant.

3.3.5 Once the offer letter is accepted, the HR coordinator sends an invitation for onboarding and a 3-day orientation to the company, along with a request to submit the following requirements:

3.3.5.1 Copy of Valid ID

3.3.5.2 A screenshot of the internet speed test for the applicant's internet connection.

3.3.5.3 A personal computer or laptop with at least an i3 processor and 4GB RAM.

3.3.5.4 A backup internet connection, such as mobile data or prepaid Wi-Fi.

3.3.5.5 Backup power solutions, including a UPS, powerbank, GenSet in case of power interruptions.

3.3.6 It is mandatory for the Virtual Assistant to participate in a Three (3) day company orientation and basic training conducted by the HR department.

3.3.7 Following the completion of the three-day onboarding and orientation program, the VA is assigned to their respective department to commence their 90-day training.

3.4 INTERNAL TRAINING



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- 3.4.1 Upon joining the company, the newly hired VA will undergo department-specific training. In the case of QMS, the 90-day training will be facilitated by the action team.
 - 3.4.2 The content and duration of the training, tailored to the specific requirements of the newly hired VA, will be determined and delivered by the respective department. For part time students, the training period will span 30 days.
 - 3.4.3 Training period: Newly hired VA undergo a 90- day training period.
 - 3.4.4 Evaluation Points: Training evaluation is conducted at a specific Intervals:
 - 3.4.4.1 First 15 days of training
 - 3.4.4.2 First month
 - 3.4.4.3 Second month
 - 3.4.4.4 Third month
 - 3.4.5 Advancement to L1 Account Coordinator
 - 3.4.5.1 After the 90-day training period, the VA can advance their status to L1 Account Coordinator based on the evaluation and manager recommendation.
 - 3.4.5.2 Advancement to L1 can also occur before completing the 90-day training based on the evaluation and manager recommendation.
 - 3.4.6 Termination Policy: If the VA does not pass the training after the second month, the company reserves the right to terminate their employment.
- 3.5 FREELANCER PROJECT**
- 3.5.1 Freelance Writer
 - 3.5.1.1 Are tasked with creating SOP templates/PFL Templates.
 - 3.5.1.2 Upon receiving the assigned topic, the freelance writer has 24 to 48 hours to submit the initial draft of the SOP for review.
 - 3.5.1.3 Feedback for the initial review will be provided within the 24 to 48 hours for any necessary revisions.
 - 3.5.1.4 The freelance writer then has 24 to 48 hours to submit the revised SOP for the final approval.
 - 3.5.1.5 Each assigned topic can only undergo a maximum of three revisions. If further revisions are needed beyond this limit, the assigned topic will be cancelled.
 - 3.5.1.6 Freelance writers are encouraged to access VO1 during working hours from 9:00 am to 5:00 PM CST, Monday to Friday for support and coaching.
 - 3.5.1.7 Once the PFL bundle/SOP template is approved, it will be forwarded to the Accounting department for payment processing.
 - 3.5.2 IT Web Developer/Project-Based
 - 3.5.2.1 IT Freelancer can access VO IT from 9:00 am to 5:00 pm CST, Monday to Friday for inquiries and updates.
 - 3.5.2.2 Project assignments for IT freelancer are allocated and supervised by the Project Manager
 - 3.5.2.3 Upon review and completion of the project by the IT Manager, confirmation is sent to the Accounting Department to initiate the payment process.
 - 3.5.3 For all freelance projects, before commencing any task or projects, the freelance VA is required to complete and sign a contract provided by the Accounting department.
- 3.6 GENERAL MANAGER TRAINING.** This refers to any department manager aspiring to advance and the Consultare Inc Group. The GM trainee also serves as an alternate to the CEO.
- 3.6.1 Expectations of a General Manager revolve around ensuring regulatory compliance, managing risk, fostering a culture of integrity, and driving continuous improvements to support the company's long-term success.
 - 3.6.2 A GM will be involved in conducting the overall departmental performance, achieving a 80 to 90% retention rate, and serve as a problem solver and standing in for the senior management.



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- 3.6.3 A GM trainee will have 5 levels of training to become a General Manager and be a part of the Senior Management.
- 3.6.3.1 General Manager Trainee Level 1. The GM trainee will work as Senior Manager for the Sales department for a year. Responsibilities include sourcing accounts, onboarding clients, conducting client demos, and contributing to sales and business development effort. After one year, the CEO will evaluate the performance of the GM trainee.
- 3.6.3.2 General Manager Trainee Level 2. The GM trainee must pass the Level 1 training to proceed to Level 2. In level 2, the GM trainee will be assigned to the QMS and A-Team department for a year. Responsibilities include creating and presenting PFL, serving as an account coordinator, and eventually leading the QMS and Action Team department. Evaluation of the CEO is after one year of training.
- 3.6.3.3 General Manager Trainee Level 3. The GM trainee must pass Level 2 to proceed. On level 3, the GM trainee will work as an IT coordinator/IT project coordinator for a year. Responsibilities include managing IT projects, engaging with clients, and coordinating IT projects. Evaluation of the CEO is after 1 year.
- 3.6.3.4 General Manager Trainee Level 4. The GM trainee must pass Level 3 to proceed. On level 4, the GM trainee will work as an HR coordinator for a year. Responsibilities include reviewing profiles, conducting interviews, addressing VA concerns and performing HR tasks. Evaluation of the CEO is after 1 year.
- 3.6.3.5 General Manager Trainee Level 5. The GM trainee must pass level 4 to proceed. On level 5, the GM trainee will work as an accounting coordinator for a year. Responsibilities includes creating invoices, managing payroll, understanding PNL, and VA contract. Evaluation of the CEO is after 1 year for the promotion as General Manager.
- 3.6.4 With the advancement of the GM trainee to the next level, the Salary compensation for the GM trainee will increase by \$50.
- 3.6.5 To qualify as a GM trainee, the applying manager needs to hold a relevant certification in fields related to the compliance profession such as, Audit certification, PCQI (Preventive Controls Qualified Individual) certification, SQF (Safe Quality Food) certification, and similar credentials. These Certifications demonstrate their expertise and competence in ensuring regulatory compliance and maintaining quality standards within the company.
- 3.7 LEVEL PROGRESSION**
- 3.7.1 The basic salary of a full time Virtual Assistant beginning the 90-day training until reaching L1 status is \$375. Employment Status is categorized by level as follows:
- 3.7.1.1 L1 - Account Coordinator
- 3.7.1.2 L2 – Team Lead
- 3.7.1.3 L3 – Department Coordinator
- 3.7.1.4 L4 – Supervisor
- 3.7.1.5 L5 – Assistant Manager
- 3.7.1.6 L6 – Manager
- 3.7.2 A newly hired Virtual Assistant with a PRC Licensure Exam and solid field experience in a manufacturing facility receives an additional \$50 on top of their basic pay upon reaching L1.
- 3.7.3 Additionally, any Virtual Assistant who obtains a PRC license or certification related to the compliance field, such as PCQI, SQF, and the like will receive an additional \$50 in their base salary.
- 3.7.4 Each time a Virtual Assistant is promoted to a higher level, they will receive a salary increase of \$50. Promotion occurs every 6 months, coinciding with the company's performance review.



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PART 4: COMPANY POLICY

4.1. TIMEKEEPING

- 4.1.1 All Virtual Assistant must access their InterlinkIQ account and navigate to your profile. Once there, select the "Time Tracking" option. Begin tracking your work time at the beginning of your work session and end the tracking at the conclusion of your work. The work schedule is weekdays from Monday to Friday.

4.2. SERVICE LOGS

- 4.2.1 All Virtual Assistants must accurately record their hours worked, either electronically or manually through the service logs that are featured in the InterlinkIQ (IIQ) System.
- 4.2.2. All Virtual Assistant are obligated to ensure precise timekeeping for all tasks performed. It is mandatory for all Virtual Assistant to complete their service logs within a 24-hour period. The policy of "No service logs, no payroll" is strictly enforced.
- 4.2.3 All hours logged in the service log must align with the individual's employment status. Additionally, it is required to review the performance tab in the IIQ system before the payroll cut-off.
- 4.2.4 All Virtual Assistant must have a username and password in the InterlinkIQ. All Virtual Assistant must update their logs daily. All service logs must be breakdown properly according to the standards:
- 4.2.4.1 Service logs through My Pro. My Pro is an integral component of the IIQ dashboard that allows users to oversee their assigned tasks and projects. The users can utilize the time tracking feature to record their work hours and monitor productivity levels effectively.

The screenshot displays the 'My Pro' dashboard interface. On the left, a sidebar menu lists various options, with 'My Pro' highlighted. The main content area shows a table of tasks. The table has columns for Ticket#, Project Name, Description, Request Date, Due Date, and Status. Below the table, there are filters for 'Not Started (40)', 'In Progress (10)', and 'Completed (411)'. The table lists several tasks, including 'Checking of Attendance', 'Request for Access to Interlink IQ', 'Consultare Virtual Assistant Company Manual', 'Internal Audit CAPA Report', 'Virtual Assistant Agreement CONSULTARE', and 'Consultare Employee Register -20221027 Draft'. Each task row includes buttons for 'My Task', 'Compliance', 'Add', and 'Edit'.



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Click the Add Button and fill in the “New Action Item” then click submit.

The 'New Action Item' form contains the following fields and labels:

- Task Name**: A text input field.
- Supporting File**: A file selection button labeled 'Choose File' with the text 'No file chosen'.
- Action Types**: A dropdown menu with '—Select—'.
- Account**: A dropdown menu with 'CONSULTAREINC' selected.
- Description**: A text input field.
- Estimated Time (minutes)**: A text input field with '0'.
- Desired Due Date**: A date selection field with '2023-04-05'.
- Status**: A dropdown menu with 'Not Started'.
- Assign to**: A text input field with 'Justi Desierto'.

Labels with arrows pointing to the form fields:

- Reference document (points to Task Name)
- Supporting File (points to Supporting File)
- Client you're working (points to Account)
- Activity (points to Action Types)
- Details of the task (points to Description)
- Task Date (points to Desired Due Date)
- Total number of Minutes (points to Estimated Time (minutes))
- Status (points to Status)
- Name (points to Assign to)

Buttons at the bottom: Close, Submit.

63623	From: Justi	Hill-Consultare Inc. Checking of Attendance- 20230405	update the attendance	CONSULTAREINC	Update	Assign to: Justi	Completed	0100%	Start: 2023-04-05	Due: 2023-04-05			
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4.2.4.2 Service logs through Auto logs which streamlines the process of tracking activities by automating the recording process, thereby reducing the need for manual data entry and reducing the need for manual data entry and ensuring more accurate and efficient tracking.



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Auto Service Log

Home > Auto Service Log

AUTO SERVICES TIME LOG (KINDLY REVIEW YOUR TIME BEFORE UPLOADING TO SERVICES.)

Total Action: 38 Total Time(hours): 2.28

Upload All Upload All button function is still in progress please upload your service log by pressing the individual upload button for now..

Description	Action	Comment	Account	Date	Time(min)
Newly Onboard VA- 15 Days Training Activity	Created	Anthony Delara Under IT	CONSULTAREINC	2023-04-11	1
Newly Onboard VA- 15 Days Training Activity	Created	Andrei James Bobila Under Customer Success	CONSULTAREINC	2023-04-11	1
Newly Onboard VA- 15 Days Training Activity	Created	Danielle Dhea Lacap Under ATeam	CONSULTAREINC	2023-04-11	1
Newly Onboard VA- 15 Days Training Activity	Created	Eunice T. Capati Under ATeam	CONSULTAREINC	2023-04-11	1
Newly Onboard VA- 15 Days Training Activity	Created	Noreen Serrano Under Ateam	CONSULTAREINC	2023-03-24	1
Newly Onboard VA- 15 Days Training Activity	Created	Mirah Adouiz Under Ateam	CONSULTAREINC	2023-04-11	1


4.3. PAYROLL

- 4.3.1 Virtual Assistant salary is facilitated through online payment such as Wise, World Remit, and/or Paypal. Service logs must be updated daily and finalized by the cut-off day.
- 4.3.2 Payroll is processed bi-monthly. The first payroll period is on the 15th of the month with a cut-off period on the 12th and the second payroll period is on the 30th of the month with the cut-off period on the 27th. Processing of the payroll typically takes 1 to 2 days.
- 4.3.3 Every cut-off period, the accounting account coordinator will review the completed service logs alongside with the PTO requests, absences, and deductions. Once completed, the payroll will be submitted to the Chief Finance Officer for the final approval and payment processing.
- 4.3.4 Upon processing payment, all references and charges will be recorded. To finalize the payroll process, The virtual assistant must click the “RECEIVED” button in their Payslip dashboard in the IIQ upon receiving their compensation. (Refer to sample image below for guidance). Failure to complete the payroll process by the VA will result in the VA’s next compensation being placed on hold.



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 CONSULTARE INC. GROUP	PAYSLIP	Paid Time Off: 0	
	March 22, 2023	Remaining PTO: 24	
Name: Admin		Bank Name: Banko De Oro (BDO)	
Employee ID: 219		Bank Account No.: 123	
Position:		Email Address: admin@interlink.com	
Department:			
Description	Earnings	Description	Deductions
Basic Pay	150	Leave Without Pay	0
Commission	0	Cash Advance	25
Incentive	0	Process Fee	0
Referral Fee	0		
Adjustment	0		
Total Earnings	150	Total Deduction	25
Gross Pay to Date: 150		Net Pay to Date: 125	
Year to Date Gross Pay: 350		Year to Date Net Pay: 300	
		CA Deduction to Date: 50	

Download

4.3.5 If there are any delays in the payroll processing, concerns will be addressed by the accountant and the CFO.

4.3.6 Salary will be suspended for individuals who fail to update their logs within the cut-off period. It is imperative that service logs are updated daily. The accounting account coordinator will conduct regular checks on the service logs.

4.4. DEDUCTIONS

All deductions from payroll include those for absences, company loans, asset requisition, and transaction fees related to remittances.

4.4.1 If your allocated Paid Time off (PTO) is exhausted before the end of the year, and you have emergency or vacation leave that you must take, your absences will be deducted from that pay period.

4.4.2. Cash bonds are required for assets distributed by the company. A six-month cash bond will be deducted from the VA upon receiving a Laptop/Personal Computer/Headset. The cash bond will be reimbursed after one year based on market value if the VA remains loyal to the company. The eligibility of assets requisition is for Level 6 only.

4.4.3. Asset Requisition Loan is a request to borrow an asset for a specified period. This could include a laptop, personal computer, or other resource to perform job duties. The VA will submit a formal request for a loan and once approved by the CFO, the loan will be forwarded to the VA. The payment will commence in the upcoming pay period. The loan payment will be divided in a six month period.



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4.4.4. Cash Advances will be authorized for medical or calamity-related needs. Medical emergencies must involve immediate family members.

4.4.4.1 For married VA's, this includes spouse and children, while for single VA's, it encompasses parents irrespective of age. Single-parent VA's may also include their children in addition to their parents. Calamity emergencies, such as earthquakes or typhoons are also eligible for cash advances.

4.4.4.2 Cash advance is restricted to a maximum of \$300 to be deducted over a six-month period. The VA will submit the CA form to the accounting department for review and approval by the CFO. Subsequently, the accounting department will verify the cash advance, issue a summary of deductions, send it to the VA for signature, and then return it to the accounting department for documentation. After the VA signs the form, the accounting department will forward the request to the CFO for payout processing.

4.4.4.3 It is important to note that the cash advance amount is contingent upon approval by the CFO based on their position within the company.

4.4.4.4 Upon receiving the cash advance, the VA must provide the proof of payment for medical expenses for documentation purposes. The cash advance will be deposited to the VA's payroll account.

4.5 VIRTUAL OFFICE POLICY

4.5.1 Virtual office is a workspace for an online environment allowing a team to work remotely from any location with internet access.

4.5.2 All Virtual Assistants are required to maintain their presence in Virtual Office 1 via Google meet for the duration of their shift. Should the VA need to take a break or relocate to another Virtual office, they must inform their colleagues of their whereabouts and activities by sending a message through the in-call messaging system.

4.5.3 Virtual Assistants are entitled to a 30 minute break during their 8-hour shift.

4.5.4 Multiple virtual offices have been established to accommodate everyone and these offices serve as the designated spaces for team discussions on issues and concerns.

4.5.5 Failure to be present in the Virtual Office 1 without proper notification to the supervisor, as verified by attendance checks, will be considered as an unexcused absence and may result in the issuance of incidental report (IR).

4.5.6 Virtual Office is reserved for general announcements and attendance tracking purposes. Additionally, each department has its designated Virtual Office for addressing specific concerns.



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4.5.7. In the event of a scheduled power interruption, a notification or proof from the local electric provider must be provided. Moreover, a backup source such as UPS, power banks, or generators must be available.

4.5.8 For unscheduled power outages, the same backup power sources must be prepared. During such occurrences, Virtual Assistants are required to inform the group and send notice to the company group chat or via email to provide updates.

4.5.9 Regarding internet connectivity issues:

4.5.9.1 If there is a loss of internet connectivity, the Virtual Assistant must utilize a backup mobile data and they should also inform the Team that they are connected through mobile data only.

4.6 EMAIL MANAGEMENT

4.6.1 Company Email Usage

4.6.1.1 All Virtual assistants will be provided with a company Email account for official communication purposes.

4.6.1.2 Company email accounts are to be used exclusively for conducting company business, including client communication, internal discussion, and project coordination.

4.6.2 Personal Use Restriction

4.6.2.1 Company email accounts must not be used for personal activities, such as social media browsing, online shopping, or personal email correspondence.

4.6.2.2 Avoid sharing sensitive personal information through company email to mitigate security risks.

4.6.3 Confidentiality and Security

4.6.3.1 Exercise caution when discussing confidential matters via email, ensuring that sensitive information is only shared with authorized individuals.

4.6.3.2 Regularly update password and adhere to strong password practices to maintain email security.

4.6.3.3 Be vigilant for phishing attempts and suspicious Emails. Report any suspicious activity to the IT Department immediately.

4.6.4 Email Organization and Management

4.6.4.1 Maintain an organized email inbox by categorizing emails into folders based on priorities, projects, or sender.

4.6.4.2 Regularly review and respond to emails in a timely manner to ensure efficient communication flow.



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4.6.4.3 Archive and delete unnecessary emails to declutter the inbox and improve efficiency.

4.6.5 Client Communication Protocol

4.6.5.1 Adhere to professional standards when communicating with clients via email, including proper grammar, spelling, and tone.

4.6.5.2 Ensure that all client correspondence is accurate, compliant, and reflective of the company's values and standards.

4.6.6 Monitor and Compliance

4.6.6.1 Email communications may be monitored for compliance purposes to ensure adherence to company policies and regulatory requirements.

4.6.6.2 Virtual assistants are expected to comply with all company policies and regulatory requirements.

4.6.6.3 Virtual Assistant are expected to comply with all company policies and procedures regarding email usage.

4.6.6.4 The account coordinator manages the account email.

4.6.6.5 The account coordinator is responsible for all the client engagement and PFL bundling emails.

4.6.6.6 Team Lead/Supervisor reviews all emails before sending them to the client.

4.6.6.7 Account email password is changed whenever a new account coordinator is needed.

4.6.7 Training and Support

4.6.7.1 Virtual Assistant will receive training and support on email management best practices and company email policies.

4.6.7.2 Any questions or concerns regarding email Management should be directed to the manager for assistance.

4.7 CRISIS MANAGEMENT

4.7.1 Emergency Communication Channel

4.7.1.1 In the event of calamity or disaster, the Virtual Assistant should immediately notify their manager and HR department.

4.7.2 Safety Protocols

4.7.2.1 The safety of our Virtual Assistant is our top priority. In the event of a calamity or disaster, prioritize personal safety above all else.

4.7.2.2 Follow evacuation procedures and emergency protocols as outlined by local authorities.



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4.7.3 Accountability and Reporting

- 4.7.3.1 Virtual assistants are responsible for promptly reporting their safety status and location to their manager and HR department.

4.7.4 Information Dissemination

- 4.7.4.1 Ensure that accurate information regarding the calamity or disaster is disseminated promptly to all virtual assistants.

4.7.5 Support and Assistance

- 4.7.5.1 Crisis Management in the event of natural disaster like typhoons, earthquakes, and flash floods.
- 4.7.5.2 The company will provide financial assistance to the management team and key personnel affected by the disaster.
- 4.7.5.3 Each region will have a designated relocation area for the management team.
- 4.7.5.4 The company will allocate a budget for hotel accommodations and provide per diem allowances for the affected victims.
- 4.7.5.5 To support the affected victims financially, the company will continue to disburse salaries.

4.7.6 Continuity of Operations

- 4.7.6.1 In the event of calamity or disaster, the virtual assistant may adjust their work schedules to accommodate the crisis situation.

4.7.7 Documentation and Review

- 4.7.7.1 After the crisis has passed, the company will conduct a review and debriefing session to assess the effectiveness of the crisis management response and identify areas of improvement.
- 4.7.7.2 Virtual Assistants are encouraged to provide feedback and suggestions for enhancing the company's crisis management procedures.

4.8 RECORDS MANAGEMENT

4.8.1 VIRTUAL ASSISTANT RECORDS

- 4.8.1.1 All records are housed within the HR system of the InterlinkIQ System. Personal documents including resumes, third party certificates, valid ID's, contract agreements, and job description are uploaded to the "Employee file" section. These records are renamed using the standard format "Title of the Record-Name of the VA-YYYY-MM-DD," incorporating the date of the account.



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4.8.1.2 Internal records, such as Incidental Report, Notice to Explain, and Notice of Termination are treated as confidential and are managed exclusively by the Human resources coordinator. Additionally:

4.8.1.2.1 Accounting coordinator oversees additional personal records such as bank details.

4.8.1.3 Training records such as certificates from regulatory and certification bodies are stored in the training record dashboard.

4.8.1.4 Reuploading of records such as VA contract agreements and job description are required when the VA changes job status such as promotion.

4.8.1.5 Frequency of record management activities is as follows:

4.8.1.5.1 Onboarding

4.8.1.5.2 Changes in VA job status⁴

4.8.1.5.3 Re-training

4.8.1.5.4 Annually for refresher training

4.8.2 ACCOUNT RECORDS

4.8.2.1 Record Classification and Organization

4.8.2.1.1 Virtual Assistant must classify client records on their nature, significance, and confidentiality level.

4.8.2.1.2 Client records should be organized Systematically using appropriate folder structures.

4.8.2.2 Confidentiality and Security Measures

4.8.2.2.1 Maintain the confidentiality and security of client records at all times, ensuring that access is restricted to authorized personnel only.

4.8.2.2.1.1 Deactivate access to all account(s) that a VA has access to when he/she resigns.

4.8.2.2.1.2 Change the account login details (i.e. username and password) applicable to all accounts to which a resigned VA has access.

4.8.2.2.2 Use secure transmission methods when sharing or transferring client records electronically.

4.8.2.3 Backup and Disaster Recovery

4.8.2.3.1 Regularly back up client records to prevent data loss in case of system failures or unforeseen disaster.

4.8.2.3.2 Implement disaster recovery measures to ensure the timely restoration of client records in the event of a catastrophic event.



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4.8.2.4 Audit Trail and Documentation

4.8.2.4.1 Maintain accurate and up-to-date records of all client interactions and communications.

4.8.2.4.2 Document any changes or updates made to clients records, including the date, time, and Purpose of the modification.

4.8.2.5 Compliance Documentation

4.8.2.5.1 Ensures that all client-related documentation including agreements, contracts, and compliance reports is properly maintained and updated as necessary.

4.8.2.5.2 Maintain record of client compliance activities including assessment, audits, and regulatory submission.

4.8.2.6 Document Retrieval

4.8.2.6.1 Ensure effective retrieval of records by client making it accessible for employees authorized by the company whenever and how often it is needed.

4.8.2.6.2 For terminated contracts, provide a copy of client records based on the agreement written in the contract. Use secure transmission methods.

4.8.2.7 Employee Training

4.8.2.7.1 Ensure awareness of each VA in this policy and the proper record-keeping to maintain compliance and data security.

4.9 LEAVE POLICY

4.9.1 This policy outlines the allocated number of leave available to Virtual Assistant, the type of leaves for which they are eligible, and the procedure for requesting them.

4.9.2 A full-time VA is granted 24 days Paid Time Off (PTO) at the beginning of each year. This PTO must be utilized within the ensuing 12 months, otherwise, it will be forfeited and cannot be carried over to the subsequent year. It is worth noting that at the commencement of the new year, another 24 days of PTO will be provided, regardless of any remaining days from the previous year.

4.9.3 This policy ensures that the company offers sufficient time off for addressing various needs, including addressing issues, recuperating from illness, taking vacations, managing life events, observing holidays, or simply unwinding.

4.9.4 Compensatory Time Off/ Comp Day

4.9.4.1 A Compensatory time off or Comp Day is granted to VA's for working overtime hours.



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4.9.4.2 A Comp day is awarded to VA's who have put in extra hours to prepare for and participate in a client audit.

4.9.4.3 A Comp day is provided to a VA who has worked on weekends for approved special projects as authorized by the management.

4.9.4.4 A 2-day Comp day will be credited upon the conclusion of a client audit.

4.9.4.5 All Comp days must be requested with approval from the management and filled within two (2) months.

4.9.5 Paid Time Off (PTO)

4.9.5.1 PTO encompasses vacation, emergency, sick, and personal time available to the VA for use during paid absences from duty. Full time VA are entitled to 24 days of PTO each year. For the new VA, following the 90-day probationary period, the new Va will begin accruing two days of PTO per month.

4.9.5.2 To request for PTO, the VA should email their manager at least 2 weeks before the start of the month. The manager will then forward approved requests to the HR department.

4.9.5.3 On the day of the PTO, as part of the endorsement, the VA should send an email endorsement notification to their Manager, team, and HR department.

4.9.6 Vacation Leave

4.9.6.1 Virtual Assistant eligible for PTO must submit an annual or monthly vacation plan to their manager for approval.

4.9.6.2 Vacation leave requests coinciding with Christmas or New year's holiday may only be taken once every other year and are subject to approval by the manager.

4.9.6.3 Vacation leave request cannot be submitted after a sick leave has been taken.

4.9.6.4 Vacation leave is intended for planned absences such as birthdays, anniversaries, and personal reasons. This must be requested at least 30 days in advance.

4.9.6.5 Approval from the manager must be obtained via email along with project and task endorsements.

4.9.6.6 Approval from the manager must be obtained at least 30 days prior to the requested vacation leave.

4.9.7 Medical leave

4.8.7.1 Scheduled doctor's appointment.

4.8.7.2 Scheduled medical, surgical, and or therapy sessions.

4.9.8 Absences

4.9.8.1 Absent notification for sick leave should be done 2 hours prior to the start of the shift. An email notification should be sent to the HR department and the



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manager to ensure proper turnover of duties and responsibilities to the alternate to prevent work delays.

4.9.8.2 Late notification and absence of email endorsement will result in automatic disapproval of the leave, which will be considered leave without pay.

4.9.8.3 Approved sick leave is deducted from the PTO days.

4.9.8.4 A sick leave exceeding 2 days requires presentation of a medical certificate before returning to work to verify the reason for sick leave.

4.9.8.5 Approved sick leave is deducted from the PTO days.

4.9.8.6 Absences approved or disapproved for more than 6 occurrences in one year will lead to termination.

4.9.8.7 A verbal warning from HR will be issued after three (3) occurrences of absences.

4.9.8.8 A written warning from HR will be issued after five (5) occurrences of absences.

4.9.8.9 Termination will occur upon the 6th occurrence.

4.9.9 Emergency Leave.

4.9.9.1 Emergency leave pertains to situations involving Medical emergencies. This includes instances of physical injury or illness affecting the VA or a family member, such as a parent, spouse, or children.

4.9.9.2 It also encompasses cases of the death of an immediate family member within the first degree relationship.

4.9.9.3 Additionally, natural calamities like earthquakes, typhoons, and other disasters are considered grounds for emergency leave.

4.9.9.4 In the event of emergency leave, the VA must notify the HR department and their manager. It is essential to conduct a proper turnover of duties and responsibilities to the alternate to prevent any disruptions of work.

4.9.9.5 Emergency leave due to power interruption or lack of internet connection will be treated as leave without pay.

4.9.10 Maternity Leave

4.9.10.1 Female VA are required to submit a Maternity Leave request along with a medical certificate stating the expected delivery date at least 30 days prior to delivery

4.9.10.2 The VA on maternity leave must ensure to endorse all tasks and deadlines to her alternate.

4.9.10.3 Regardless of whether the delivery is normal or via C-Section, a VA is entitled to a paid maternity leave of up to 45 days.



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4.9.10.4 During the first 45 days, the VA is encouraged to recuperate. From the 46th day onward, the VA is expected to gradually resume work, starting with at least 20 hours in the first 2 weeks. After the completion of a 60 days leave period, the VA should return to full-time work, performing 40 hours per week.

DAYS OF LEAVE	CLASSIFICATION
45 DAYS (6 WEEKS)	Advise to rest.
46 TO 60 DAYS (7 TO 8 WEEKS)	Report to work 20 hours per weekTop of Form
AFTER THE 8TH WEEK	Return to work full time/40 hours

4.9.10.5 All female personnel are eligible to avail the maternity leave benefits outlined in this policy. A minimum tenureship of six months is required to qualify for maternity leave.Top of Form

4.9.11 Paternity Leave

4.9.11.1 Under this policy, all male Virtual Assistant are entitled.
paternity leave.

4.9.11.2 The VA must inform the manager and HR department before the expected date of birth of his child.

4.9.11.3 To request Paternity leave, the male VA must submit a Paternity Leave application along with the medical certificate from his spouse confirming the expected delivery date, at least 30 days prior to the due date. Additionally, he must ensure to delegate all tasks and deadlines to his alternate.

4.9.11.4 Paternity leave must be taken within 15 days of the child's birth, with a maximum duration of seven (7) days.

4.9.11.5 To qualify for paternity leave, a minimum tenure of six (6) months is required.

4.9.12 Unpaid Leave

4.9.12.1 In certain situations, both full-time and part-time regular VA who have successfully completed the 90- day probationary period may be eligible for unpaid leave.

4.9.12.2 Approval for such contingent upon written Written authorization from the manager.

4.9.12.3 Virtual assistants without paid time off (PTO) may request unpaid leave at any time, and the duration will be deducted from the payroll period.

4.9.13 Educational Leave



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4.9.13.1 A Virtual Assistant is required to request study leave at least 30 days before the scheduled review and examination date.

4.9.13.2 The start and end dates of the study leave period must be specifically approved by the Senior Management.

4.9.13.3 The examination must be of a type that aligns with a Professional Regulation Commission (PRC) licensure relevant to the VA's job description.

4.9.13.4. The VA must ensure to delegate all tasks and responsibilities at least three (3) days before the commencement of the study leave.

4.9.13.5 Additionally, the VA utilizing the study leave must utilize their Paid Time Off (PTO) to ensure compensation during the leave period.

4.9.14 Absence Reporting

4.9.14.1 To promote the timely reporting of absences whether for vacation, sick leave, or other reasons, any absence without proper notice or justification will be regarded as unpaid leave.

4.9.14.2 If a VA fails to report to work without notifying their immediate supervisor or HR, they will be terminated for job abandonment within 72 hours.

4.10 RESIGNATION POLICY

4.10.1 In adherence to company policy, Certificate of Employment will not be provided to Virtual Assistant who fails to complete the proper resignation process and submit their endorsement.

4.10.2 For VA at L1 to L4 levels, providing a ten (10) business days advance written notice to the manager, along with a copy to the HR and accounting department is mandatory. Additionally, a written endorsement of tasks and responsibilities must be submitted 1-2 days before the last day of employment.

4.10.3 For VA at L5-L6 levels, a notice period of at least 30 days or one month in advance is required to be given to the senior management team. A written endorsement of tasks and responsibilities must be submitted a week before the last day of employment.

4.10.4 Failure to fulfill these requirements will result in the withholding of COE issuance upon the Va's departure.

4.11 PERFORMANCE REVIEW

4.11.1 This policy is to establish a structured framework for conducting Performance review of the Virtual Assistant within the company. Performance reviews serve to assess and enhance the effectiveness, productivity, and overall performance of the Virtual Assistant.



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- 4.11.2 This policy applies to all full time Virtual Assistant and part-time apprentices.
- 4.11.3 Frequency of Performance review for Virtual Assistant will be conducted bi-annually, performed in the months of June and December.
- 4.11.4 Performance Review Process
 - 4.11.4.1 Evaluation Criteria for the performance review will be based on predefined criteria relevant to the role and responsibilities of the Virtual Assistant. This may include but are not limited to:
 - 4.11.4.1.1 Adherence to company policies and procedures.
 - 4.11.4.1.2 Quality and accuracy of work.
 - 4.11.4.1.3 Timeliness and efficiency in task completion.
 - 4.11.4.1.3 Communication skills
 - 4.11.4.1.4 Problem solving abilities
 - 4.11.4.1.5 Ability to work independently and as part of a team.
 - 4.11.4.1.6 Professionalism and interpersonal skills.
 - 4.11.5 Managers Evaluation. The Virtual Assistant department Manager will conduct a performance evaluation to assess the performance against the established criteria.
 - 4.11.6 Self Evaluation. In self evaluation, the VA will be given the opportunity to conduct a self-assessment, reflecting on their performance over the review period and identifying strengths, areas for improvement, and professional development goals.
 - 4.11.7 Peer Review is another part of the performance evaluation that refers to the process of assessing the VA's performance by their colleagues or peers within the same organization. This evaluation is conducted by individuals who work closely with the employee being reviewed but are not the person they report to.
 - 4.11.8 Performance discussion. A formal meeting will be scheduled between the VA and their manager to discuss the performance evaluation. During this meeting, the manager will review the evaluation findings, discuss strength and areas for improvement, and collaborate with the VA to establish performance goals and development plans for the upcoming review period.
 - 4.11.9 Performance evaluation and discussion will be documented and maintained in the IIQ VA personal file for record-keeping purposes.
 - 4.11.10 All information related to performance reviews will be treated with confidentiality and shared only with authorized personnel involved in the performance review process.
 - 4.11.11 This policy complies with all relevant laws and regulations governing performance management and practices.



PART 5: BENEFITS

5.1 TENURESHIP

- 5.1.1 A full time Virtual Assistant (VA) is eligible for a tenureship payment of up to every six (6) months throughout their tenure with the company.
- 5.1.2 The amount of the tenureship pay, up to \$25 will be determined based on the VA's performance evaluation conducted every June and December.
- 5.1.3 The company encourages the VA to utilize their tenureship increase towards payment to health insurance and social security.

5.2 PAID TIME OFF (PTO)

- 5.2.1 All Virtual Assistants (VA) are entitled to receive 24 days of Paid Time Off leave per year, which can be used for approved Purposes such as vacation leave, medical leave, maternal and Paternal leave, educational leave, and emergency leave.
- 5.2.2 It is important for the VA to utilize their allocated 24 days of PTO within the year, as any unused days will be forfeited. After completion of the year, the VA will be granted another 24 days of leave for the following year.

5.3. COMMISSION AND BONUSES

5.3.1 Managers 3% commission

- 5.3.1.1 All Managers are entitled to a 3% commission as shared revenue from the initial payment from all new accounts including software subscription, software setup, end-to-end service, and projects.
- 5.3.1.2 Additionally, the managers will receive a 3% commission on the first upgrade payment from our existing accounts.
- 5.3.1.3 The total amount, equal to 3% of the total payment received, is divided equally among all managers and is added to their payroll as commission.
- 5.3.1.4 It is important to note that commission is disbursed only after the invoice payment is cleared from the company's bank account.

5.3.2 Virtual Assistant Bonuses

- 5.3.2.1 Signing Bonus of \$50 is granted to a newly onboarded VA after completing their 90 days of tenureship with the company.
- 5.3.2.2 Referral Bonus of \$25 is given to a full-time VA who refers a new VA who completes the 90-day training period. An additional bonus of \$25 will be awarded to the referring VA upon the new VA completing six (6) months of tenureship within the company.
- 5.3.2.3 Gift Bonuses
 - 5.3.2.3.1 All full time VA who reach their yearly Anniversary will receive a \$20 bonus.
 - 5.3.2.3.2 All VA who celebrate their birthday will receive a \$20 gift bonus.
 - 5.3.2.3.3 A random check on the VA's service logs will be conducted by the CFO, and any VA with complete service logs will receive a \$20 bonus.
 - 5.3.2.3.4 These bonuses will be added to the VA's payroll.

5.3.3 Sales Team Incentive

- 5.3.3.1 A 3% sales incentive is provided to the sales team for initiating new accounts, such as software subscription, end-to-end service, and projects. For subscription and service, the 3% is calculated from the first payment, while for projects, it is calculated from the total project amount. Additionally, the sales team receives a 3% commission for upgraded services or subscription from existing accounts that they initiated.
- 5.3.3.2 Collaborators from different departments who assist with the presentation and navigation also receive a share of the incentive. The 3% of the total payment is divided equally among all sales team members involved in the preparation and presentation.



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- 5.3.3.2 For projects, the 3% incentive is released based on the project timeline, either as monthly or one-time payment.
- 5.3.3.3 The sales manager is included in the sales team incentive. If they serve as a Subject Matter Expert (SME) during the preparation and presentation, they will not be included in the 3% incentive but will receive 0.5% incentive.
- 5.3.3.4 Subject Matter Experts can be managers from the other Department or the sales manager and are entitled to 0.5% of the total sale.
- 5.3.3.5 All sales incentives are processed once invoice payment from the account is received and cleared from the CIG bank and it is included in the VA's payroll.
- 5.3.4 Marketing Incentive
 - 5.3.4.1 Upon achieving the monthly quota of 3 successful Onboarded accounts, the Marketing Team receives a Marketing incentive of 0.5% distributed among team Members.
 - 5.3.4.2 For each RSVP received from the email blast, every VA is entitled to a \$1 incentive.
- 5.3.5 Professional Development
 - 5.3.5.1 Virtual Assistants are encouraged to attend training workshops, seminars, and certification to learn new skills, techniques, or best practices relevant to their profession.
 - 5.3.5.2 The company will cover the expenses for the VA's training, certification, or seminar participation. Upon identifying a suitable training opportunity, the VA must submit all relevant information for approval of the CFO. Once approved, the company will facilitate the payment.
 - 5.3.5.3. After the completion, the VA is required to submit the certificate of completion to the HR department for documentation purposes.
 - 5.3.5.4. The VA is expected to share the knowledge gained by presenting it to the team, contributing to collective learning and skill enhancement within the company.

PART 6: EMPLOYEE CONDUCT AND DISCIPLINE

6.1 DEFINITION OF TERMS

- 6.1.1 Notice to Explain (NTE) is a formal document issued to a Virtual Assistant who has violated company policies, rules, procedures. It serves as a notification to the VA to provide an explanation of their actions that are deemed to be in violation of the company standards. The purpose of the NTE is to allow the VA an opportunity to clarify their actions and provide any relevant information or evidence before any further disciplinary action is taken.
- 6.1.2 Incidental Report (IR) is a formal document used to report events and document facts related to the incidents that occur in the workplace. It provides a structured format for recording details such as the date, time, location, description of the incident, individuals involved, witnesses, and any action taken in response. It serves as a crucial tool for documenting and addressing incidents in a systematic and thorough manner.
- 6.1.3 Issuance of Notice To Explain (NTE). An NTE is issued to a Virtual Assistant when they are alleged to have violated company policies, rules, or procedures. It serves as a formal notification requiring the VA to provide an explanation or justification for their actions or behavior. NTE's are issued following an incident report or when there is evidence of misconduct, and there are precursors to further disciplinary actions.
 - 6.1.3.1 Issuance of Notice To Explain 1 (NTE 1)
 - 6.1.3.1.1 Upon issuance of NTE, the Virtual Assistant will have 24 hours to provide an explanation and present any factual evidence to refute the issued NTE.



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- 6.1.3.1.2 Upon receipt of the response, if the violation is proven, the VA will be ineligible to receive any tenureship, bonus, or incentives for a period of six (6) months.
 - 6.1.3.1.3 Additionally, the VA will undergo a 15-day re-training and evaluation period, followed by counseling sessions conducted by HR.
 - 6.1.3.2 Issuance of Notice To Explain 2 (NTE 2)
 - 6.1.3.2.1 Following the issuance of NTE 1 within a one (1) year calendar period, an NTE 2 is issued to the VA. The VA will have 24 hours to provide an explanation and present any factual evidence to refute the issued NTE.
 - 6.1.3.2.2 Upon the receipt of the response and evidence, if a violation is proven, the VA will be ineligible to receive any tenureship, promotion, bonuses, or incentives for a period of one (1) year.
 - 6.1.3.2.3 Additionally, the VA will undergo a 15-day re-training and evaluation period, followed by a counseling session conducted by HR.
 - 6.1.3.3 Issuance of Notice To Explain 3 (NTE 3)
 - 6.1.3.3.1 An NTE 3 issued to the VA after the issuance of NTE within one (1) fiscal year period. The VA will have 24 hours to provide an explanation and present any factual evidence to refute the issued NTE.
 - 6.1.3.3.2 Upon receipt of the response and evidence, if a violation is proven, the VA's company access will be removed and they will be issued a Notice of Termination.
 - 6.1.3.4 A Virtual Assistant who has been issued NTE 1, NTE 2, and NTE 3 will be reset at the beginning of each fiscal year.
 - 6.1.3.5 Notice To Explain clearance will occur within one (1) year from the date of issuance of the last NTE. For instance:
 - NTE 1 - issued January 5, 2023
 - NTE 2 - issued December 26, 2023
 - Clearance – December 27, 2024
 - 6.1.3.6 Notice To Explain Clearance
 - 6.1.3.6.1 After issuance of NTE 1, there will be a 15-day evaluation period based on the action items and recommendations.
 - 6.1.3.6.2 Following three (3) months of evaluation and observation, NTE can be lifted based on the manager's recommendation and senior management approval.
- #### 6.2 ABANDONMENT
- 6.2.1 Abandonment of duties and responsibilities of the Virtual assistant within 48 hours will automatically lead to termination and tagged as AWOL- Absence Without Leave.
 - 6.2.2 An AWOL Virtual Assistant will not receive the final pay and Certificate of Employment.



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PART 7: Receipt of Company Manual and Employment-at-will-Statement

This is to acknowledge that I have received and read a copy of the CONSULTARE INC. GROUP Virtual Assistant Manual, and I understand that it contains information about the employment policies and practices of the Company. I agree to read and comply with all policies in this Virtual Assistant Manual. I understand that if the Company determines a staff member has violated a policy or fails to report a violation, appropriate disciplinary measures will be taken, up to and including immediate termination. I understand that the policies outlined in this Virtual Assistant Manual are only management guidelines, which will require changes occasionally. I understand that the Company retains the right to make decisions involving employment as needed to conduct its work in a manner that benefits the Virtual Assistants and the Company. I understand that this Virtual Assistant Manual supersedes and replaces any and all prior Virtual Assistant Manual and any inconsistent verbal or written policy statements.

I understand that this Virtual Assistant Manual supersedes and replaces any and all prior Virtual Assistant Manuals.

I understand that all such revisions, deletions, or additions to the Virtual Assistant Manual will be in writing and signed by the CEO. I understand that no oral statements or representations can change the provisions of this Virtual Assistant Manual.

I understand that this Virtual Assistant Manual is not intended to create contractual obligations concerning any matters it covers and does not create a contract guaranteeing that I will be employed for any specific period.

I understand that this Virtual Assistant Manual refers to current benefit plans maintained by the Company and that I must refer to the actual plan documents and summary plan descriptions as these documents are controlling.

Suppose I have questions regarding the content or interpretation of this Virtual Assistant Manual. In that case, I will ask my supervisor or a member of Management. By signing below, I acknowledge and accepted:

Signature: _____

Name of Virtual Assistant: _____

Date: _____



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Acknowledgment of Receipt

Please take a moment to acknowledge that you have received and reviewed this manual. Your understanding of its contents is essential for a smooth onboarding and productive collaboration.

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