### HR Process

### 1. Recruitment & Selection

Finding, evaluating, and hiring the right candidate

**Documents / Forms Used:**

* Manpower Requisition Form (MRF) – Request raised by department for new hire
* Approval for MRF
* Job posting-Job posting is done in various platforms.
* Candidate Resume – Details of candidate’s education & experience.
* Shortlisting
* Candidate Application Form – Official application filled by candidate
* Interview Evaluation Form (Technical/HR) – Feedback sheet by interviewer
* Salary Fitment Approval Form – Approval for salary offered
* Offer Letter – Job offer confirmation to candidate
* Background Verification (BGC) Consent Form – Candidate’s approval for verification

**Policies:**

* Equal Employment Opportunity (EEO) Policy – Fair & unbiased hiring practice
* Recruitment & Selection Policy – Standard process for hiring
* Background Verification / Reference Check Policy – Guidelines for candidate checks

### 2. Pre-Onboarding

Collecting personal, educational, and work documents before joining

**Documents / Forms Collected:**

* ID Proofs – Aadhaar, PAN, Passport, DL for identity verification
* Address Proof – Proof of current/permanent address
* Educational Certificates & Marksheets – Proof of qualification
* Experience / Relieving Letters – Past employment proof
* Salary Slips / Form 16 – Last job’s salary records
* Medical Fitness Certificate – Health clearance
* Passport-size photographs – For records & ID card

**Policy:**

* Pre-Onboarding & Document Verification Policy – Rules for document collection

### 3. Onboarding & Joining Formalities

Introducing the employee to company, systems, and policies

**HR Documents Issued / Collected:**

* Employee Joining Form – Formal joining record
* Personal Data Form – Employee’s personal details
* Bank Account Details Form – For salary processing
* PF Nomination Form (Form 2) – Provident fund nominee details
* ESI Declaration Form – Medical insurance details (if applicable)
* Form 11 (EPF Declaration) – Declaration for PF transfer/new account
* NDA / Confidentiality Agreement – Non-disclosure agreement
* Code of Conduct Acknowledgement – Employee’s acceptance of rules
* Company Policy Acknowledgement – Acceptance of HR, IT, Leave, POSH policies
* Medical Insurance Nomination Form – Nominee details for insurance

**Policies:**

* Induction & Orientation Policy – Introduction & culture training
* Confidentiality & Data Protection Policy – Data security rules
* Code of Conduct / Ethics Policy – Standards of behavior
* Workplace Harassment & POSH Policy – Anti-harassment measures

### 4. Asset Allocation (Day of Joining / Induction)

Providing systems, devices, and access to tools

**Forms / Records:**

* Asset Allocation Form – List of items issued (Laptop, SIM, etc.)
* Asset Handover Checklist – Verification of handover items
* IT Systems Access Request Form – Request for system access (Email, ERP, etc.)
* Software Access Approval Sheet – Approved software list

**Policies:**

* IT Security Policy – Safe usage of IT resources
* Asset Usage & Management Policy – Guidelines for asset care
* Remote Work / Work-from-Home Policy – Rules for WFH setup

### 5. Probation & Confirmation

Monitoring performance and confirming employment

**Documents:**

* Probation Review Form – Performance review during probation
* Confirmation Letter – Confirmation of permanent employment

**Policies:**

* Probation & Confirmation Policy – Duration & rules of probation
* Performance Standards Policy – Standards expected from employee

### 6. Performance Management

Setting goals, reviewing, and improving performance

**Forms / Tools Used:**

* Goal/KRA Setting Form – Targets at start of year/quarter
* Mid-Year Review Form – Mid-cycle performance feedback
* Annual Appraisal Form – End of year feedback & ratings
* Performance Improvement Plan (PIP) Form – Support for underperformers

**Policies:**

* Performance Management & Appraisal Policy – Review & appraisal process
* Promotion & Career Progression Policy – Growth & promotion rules

### 7. Learning & Development

Up skilling employees through training & certifications

**Documents:**

* Training Nomination Form – Nomination for training program
* Training Attendance Sheet – Record of attendance
* Training Feedback Form – Post-training feedback
* E-Learning Completion Certificates – Proof of online learning

**Policies:**

* Learning & Development Policy – Guidelines for training
* Training & Certification Reimbursement Policy – Rules for reimbursement

### 8. Payroll & Benefits

Managing salary, benefits, and reimbursements

**HR/Finance Documents:**

* Salary Structure Letter – Salary breakup document
* Income Tax Declaration Form – Investment & tax saving proofs
* Reimbursement Forms – Travel, food, medical claims
* Bonus/Variable Pay Sheet – Incentive details

**Policies:**

* Payroll & Compensation Policy – Salary & payments
* Leave Policy – Casual, Sick, Maternity, etc.
* Travel & Expense Reimbursement Policy – Travel claim process
* Gratuity Policy – End-of-service benefit
* Provident Fund & ESI Policy – Social security rules
* Insurance & Medical Benefits Policy – Health cover details

### 9. Employee Engagement

Building a positive work culture & feedback system

**Documents:**

* Employee Feedback Form – Employee opinions & suggestions
* Grievance Redressal Form – Complaint registration form
* Employee Satisfaction Survey – Measure of workplace happiness

**Policies:**

* Employee Engagement & Recognition Policy – Rewards & recognition
* Grievance Handling Policy – How complaints are handled
* Diversity & Inclusion Policy – Inclusive workplace practices

### 10. Separation & Exit Process

Formal steps when an employee resigns or exits

**Documents / Forms Used:**

* Resignation Letter – Resignation submitted by employee
* Resignation Acceptance Letter – Company’s acceptance
* No Dues Clearance Form – Clearance from all departments
* Asset Return Form – Return of laptop, ID card, etc.
* Exit Interview Form – Exit feedback form
* Final Settlement (F&F) Sheet – Dues settlement sheet
* Relieving Letter – Formal relieving confirmation
* Experience Certificate – Work experience letter

**Policies:**

* Resignation & Exit Policy – Exit procedures
* Notice Period Policy – Notice duration rules
* Final Settlement & Relieving Policy – Settlement guidelines

### 11. Post-Exit

Capturing learnings and keeping alumni connections

**Records Maintained:**

* Exit Feedback Analysis Report – Analysis of exit reasons
* Attrition Analysis Reports – Monthly/quarterly attrition data
* Alumni Database – Former employees’ record

**Policies:**

* Data Retention & HR Record Maintenance Policy – Retaining employee data
* Alumni / Ex-Employee Engagement Policy – Maintaining alumni connections