

To: Recruitment Team	Date: 25-June-2026
From: Knowledge Transfer	Memo No: 001

SUBJECT: Mandatory Email Endorsement of Newly Onboarded Customers to BU-Admin

Dear Workforce Team,

This memorandum serves as a formal guideline requiring the **mandatory email endorsement of all newly onboarded customers to BU-Admin upon completion of the onboarding process.**

The endorsement must be completed **before the end of duty on the date of onboarding starting June 29, 2026** to ensure timely documentation, proper customer record turnover, and alignment between Recruitment and the assigned Business Unit.

This process aims to establish a standardized monitoring and endorsement flow to ensure that all newly onboarded customers are properly recorded, validated, and monitored by BU-Admin for completion of onboarding requirements.

Effective immediately, the Recruitment Team shall ensure that the onboarding completion endorsement email includes the **Newly Onboarded Customer Monitoring Tracker** reflecting the status of required documents and onboarding completion.

Required Endorsement Monitoring

The endorsement email shall include the following details:

- 1. Newly Onboarded Customer Monitoring Tracker**
 - The tracker shall serve as the reference for monitoring the completion status of customer onboarding requirements.
 - The status of each requirement must be properly updated and monitored until completion.
 - Any pending or lacking requirements must be clearly identified for proper follow-up.
- 2. Contract and 201 File Monitoring Status**
 - The actual copy of the customer contract and 201 file shall no longer be attached to the endorsement email.
 - The Recruitment Team shall only indicate the completion status of the required documents in the monitoring tracker.





- Supporting documents shall be maintained and uploaded to Click Up by the assigned team and made available when required for validation, audit, or verification purposes.

3. Email Recipients

- All onboarding completion endorsement emails must include the following recipients:
 - BU-Admin
 - BU Head
 - Recruitment Head

Newly Onboarded Customer Endorsement Monitoring Tracker



No.	Profile ID	Customer Name	Position	Site Code	Date of Onboarding Completion	Mandatory Government Numbers Complete/Incomplete (list down)	Contract Status Sent /Not sent	201 File Status Complete/Incomplete	Click up Tagging Status	Remarks Complete/Incomplete
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										

201 file Monitoring Checklist

- Information Encoded in ClickUp
- Employment Contract
- Resume
- Birth Certificate
- Valid IDs
- Certificate of Employment (if applicable)
- Handbook (COC)
- Sign Sheets
- GCash Account Verification

Mandatory Government Numbers

- SSS
- Pag-ibig



- **PhilHealth**
- **TIN** (if applicable)

BU-Admin Responsibility Upon Receipt

Upon receiving the onboarding endorsement, BU-Admin shall:

- Validate and acknowledge receipt of the endorsed monitoring tracker.
- Monitor completion of pending onboarding requirements.
- Maintain an updated tracker of newly onboarded customers.
- Coordinate with Recruitment Pooler/Onboarder regarding incomplete requirements, discrepancies, or pending submissions.
- Ensure proper monitoring and documentation of onboarding completion status.

Strict compliance with this process is required to ensure accurate customer documentation, proper endorsement, and timely completion of onboarding requirements.

Thank you for your cooperation and adherence to this process.

See attached link for your reference of tracker

<https://docs.google.com/spreadsheets/d/1et6x7ErFDuAIGqAVV810ToeLUwvXAfwpdcP2im6b0/edit?usp=sharing>

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