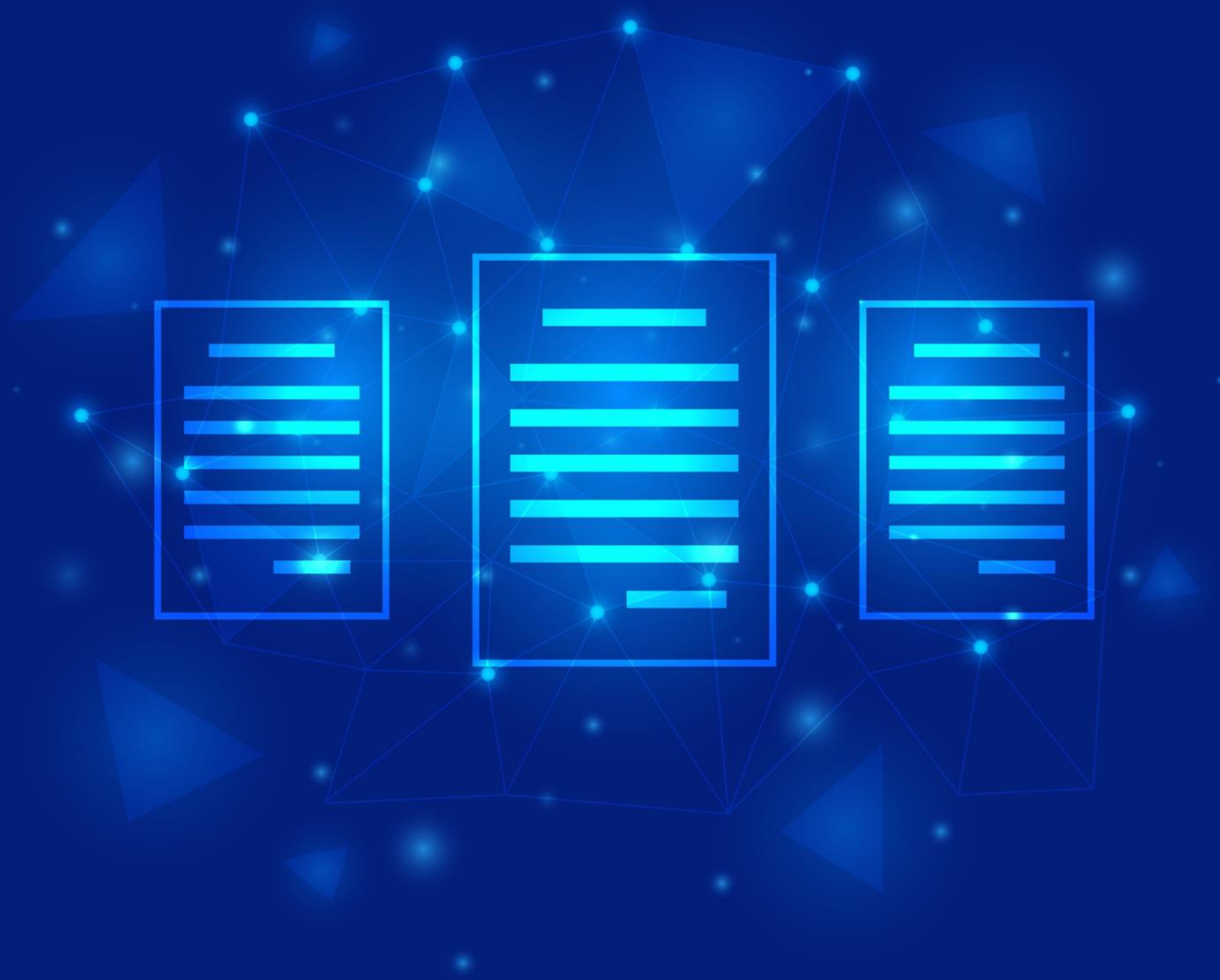
MYCPE ONE

# POLICIES



# Free Look-in Cancellation

- We prioritize ensuring the right fit for our clients. That's why we offer a 2-week free look-in cancellation option for every new hire. This means that during the initial two weeks of employment, if the staff member doesn't meet your requirements or expectations, you have the flexibility to cancel their services without any additional costs. We will refund you for that period, and no 9-week notice is required in this scenario.

- For Levels 1 to 4, you can cancel staff within 2 weeks of hiring, and we will provide you a complete refund, and no 9-week notice is required.

- For Level 5 and above staff members, we shall not be able to provide a Free Look in cancellation.

- However, we strongly emphasize conducting rigorous interviews and technical tests before making any hiring decisions. This approach allows us to ensure that the candidates have the necessary skills, experience, and qualifications to perform the job effectively. By following this practice, we aim to increase the likelihood of a successful and long-term employment relationship between our clients and the staff we provide.

- Once the initial 2-week period has expired, should the need arise to replace a staff member, we are more than willing to assist you in finding a suitable replacement. However, in such cases, a 9-week notice would be mandatory. This notice period allows for a smooth transition and ample time to find a qualified replacement without any disruption to your operations.

# Minimum Reporting & Review Checklist For Every Staff

**Advance Notification :**

Inform the client in advance once you have only 1 or 2 Days' work left.

**Day Start Message**

Day Starting Email/Message
(Project that person would work on)

**Day End Message**

Day End Email/Message
(Project that person has worked on)

**Timesheet Sending**

Sending Daily/Weekly Timesheet.

**SOP**

Making an SOP of your work within 3 months of starting and taking a Client sign-off. (Updating on an Ongoing basis)

**Review Checklist**

Making a Review Checklist of your work and taking a Client sign-off.

# Improved Female Participation

- Increased Female Participation in our Workforce from 17% in December 2020 to 28% in December 2022.
- For Female Staff working late hours, a drop-off shuttle to their doorstep provides better transport safety.
- CCTV cameras are installed in all drop-off shuttles.
- Female Grievance Committee/Anti-Abuse or Harassment Policy.
- Allowing WFH and Hybrid. (Subject to Client Approval on Selective Cases Only).
- Female Staff are given preference for being allocated to EST/CST clients. (So less crossover required)
- Implementation of overtime working during the Season Was converted into leaves and taken off during the slow season.
- Implementation of Early Fridays.
- Implementation of Day Closing.

# Staff Replacement

The Average Replacement Time is about 25 days for 2022. Approximate replacement time level-wise is as follows:

| Staff Level | Onboarding Duration |
| --- | --- |
| Level 1 to 3 | 1 to 3 Weeks |
| Level 4 | 2 to 4 Weeks |
| Level 5 & Above | 3 to 9 Weeks |

# Staff Replacement

**Within 1-year replacement Policy:** We shall offer a 2-week free Look-in Cancellation Option. (i.e, if the hired staff doesn't work out, you can cancel their services within 2 weeks, receive a refund for that period, and no 9-week notice is required). Alternatively, we can provide a staff member one level above the outgoing candidate and charge you at the current level for the first 6 months. Whichever option you select, our technical manager will provide increased attention to the new staff for 9 to 12 weeks, aiming to minimize training and handholding efforts on your end.

- Another Tip on staff replacement is that the Cross Review/Cross Training replacement process shall become easier.
- Replacement of Level 4 & above staff takes more time.
- An outgoing staff member is required to serve a notice period of 2 months so that the transition/knowledge transfer is smooth.
- We closely monitor staff hints of resignation. If their floor manager or others give any indication, we promptly escalate it to you for advance understanding, even though we may not have received an official resignation.

# WFH/Hybrid Working

We generally discourage work-from-home/hybrid work requests, but in the post-pandemic era, many Big 4 and large firms have adopted a more flexible approach. These firms are allowing not only permanent WFH but also working on Indian timings. (9.00 am IST to 6.30 pm IST). We still prefer to have at least 3 to 4 hours of crossover time. However, as a result, experienced staff members now have expectations for this flexibility as well. We may consider allowing WFH/Hybrid in certain situations, like those listed below:

- The medical condition of staff members
- Medical condition in the family.
- Female staff pregnancy and post-pregnancy.
- Indian families, at times, don't allow female staff to work late at night.
- Male staff after getting married and having kids.
- A staff member working complete US Timings.
- Experienced Staff in many cases.
- And such other situations…

# WFH - Hybrid Checklist

(Additional Security To be Implemented for WFH/Hybrid Staff)

- Client Approval in Writing is required. (If the Client hasn't approved, we can't allow it as per the contract.)
- Additional Data Security & Confidentiality Undertaking in writing given by Staff. (Shared with Client)
- EndPoint Device Management (Desktop/Laptop).
- Dedicated Workspace in the House (Can't Work from Couch/Bed/Dining Table)
- Compulsory Installation Insightful - Employee Monitoring App.
- Activity, Attendance, and Workflow Monitoring Through Insightful App.
- The workstation shall be IP locked. (Get it Whitelisted from the Client Side as well.)

  (As IP Locked staff can't work from Starbucks, a Restaurant, or any other place)
- Dedicated Monitoring, Browsing, and Other Activity Alerts. (WFH/Hybrid working Computers)

  (Monitoring of Computer Activity - On a Daily Basis - Through Insightful & IP Tracking.)

# WFH - Hybrid Checklist

(Additional Security To be Implemented for WFH/Hybrid Staff)

- Dedicated Internet Line to be Taken from Approved Providers.

  (Internet line to be provided by Company only, Personal Line Not Allowed)
- The computer is set up on our centralized domain controller.

  (We can control all our devices remotely and lock them in case of compromise)
- Laptop Device Management to be Installed. (In case the Laptop is given)
- Antivirus is installed and updated from Time to Time on all devices.
- Additional Layers of Firewall Protection - TZ series (Sonicwall) for Managing Websites, Security, and Internet Load.

# Leave Policy 2025

- 10 Days Paid Public Holidays (As per List of Holidays)
- 18 Days of paid time off (18 Days PTO)
- All paid time off, except medical leaves, shall be subject to client approval at least one week in advance.
- PTO can be utilized for Exams / Vacation / planned / medical leaves / other purposes
- 10 days of paid holidays will be charged.
- The calendar year will be from January to December.
- These leaves will be calculated on a pro rata basis from January to December, irrespective of changes in staff throughout the year.

# Leave Policy 2025

- Paid time off does not include Maternity or Paternity leave. This will be borne by MYCPE ONE.
- Leaves shall not be encashed or carried forward to the next year.
- In case of staff replacement, the replaced staff can avail of the remaining leave balance.
- If a staff member takes leave during the week, and if he works extra hours with your approval
- We will deduct the leave balance and will charge you for additional hours. e.g., if the staff takes leave on Monday and you want them to compensate for it by working on Saturday or working additional hours daily, we will be charging you for (40/20) hours plus additional hours he/she worked

# Fees Revision Policy

Regular fee revisions are crucial to ensure our compensation structure remains competitive and aligns with industry standards.

Effective from August 2023 onwards, we are implementing a new streamlined fees revision policy with the following key points.

| Staff Levels | First Year | | Annually |
|---|---|---|---|
| | After 6 Months | After 12 Months | |
| Level 1 to 3 | $1 | $1 | |
| Level 4 to Above | $1 to $2 | TBD | |

# Fees Revision Policy

- **First Fees Revision:**
  The initial fee revision will occur 6 months after the hiring date and thereafter on completion of 12 months.

- **Annual Fees Revision:**
  All subsequent revisions will take place annually in January.

- **Interim Fees Revision:**
  Occasionally, there may be interim fee revisions during the year. These revisions may occur in situations such as promotions, level upgrades, or retaining staff after resignation. The actual fee revision will be mutually decided upon during such occasions.

- **Actual Fees Revision:**
  Please note that these are suggested fee revision guidelines, and the actual fee revision may differ based on individual circumstances and mutual agreements. Our objective is to ensure a fair and transparent fees revision process while considering the value and contributions of each staff member.

# Why Overtime is Allowed? How Much Overtime is Allowed?

**"Allowing staff to work more than 40 hours/week for you or for other firm, if staff has opted for overtime working"**

## WHY

- 75%+ of Staff have migrated from smaller towns.
- No social circle or family.
- Office colleagues are friends and family.
- The focus is to maximize earnings.
- Send money back home to family.
- Better retention of talent.

## HOW

**01** How much overtime?
- 10 hrs/week
- 20 hrs/week
- 30 hrs/week

**02** Asking the first existing client for more work

**03** If not, then assigned to another client.

# No Bonus

Previously, it was permissible for clients to award bonuses to our staff, and 100% of it would go to the team. The bonus, however, was considered a gesture of goodwill rather than a contractual obligation or compulsion. It's important to note that our staff should not expect or solicit bonuses. Regrettably, some of our staff members began requesting bonuses from clients at the conclusion of tax season and even during interviews. Also, the client's bonus policy has created a non-uniform compensation structure for the same staff members in our company, causing a lot of chaos for us to manage. We provide good salaries on agreed terms, and we have given good appraisals to the team.

- **Effective Date:** Starting April 2023, changes will be made to the client bonus policy.
- **New Policy:** Clients will no longer be permitted to give extra bonuses to their offshore staff.
- **Alternative Appreciation:** Clients can offer gifts or fund staff outings, movies, picnics, etc.
- **Budget Limit:** Such gestures are capped at $100 per staff member annually.
- **Reason for Change:** The client's bonus policy has led to inconsistent compensation among staff members, making management challenging.

# Day Closing, Early Friday & Work Timings Flexibility

- **Day Closing**
  Many Team members migrate from their hometowns to the cities where we have our offices. We've noticed that as they are away from their families, they tend to extend their work day by taking lengthy breaks and chatting with their colleagues. To minimize this and enhance work-life balance, we are implementing a 'Day Closing Policy' requiring them to complete their regular working hours and head home early once done, subject to client approval unless there is a work requirement.

- **Early Friday**
  We're launching an "Early Fridays" program for non-client-facing roles. As our team members work the US shift, it limits the time they get to spend with their families. To address this and promote work-life balance, we allow team members to come early and leave early (9:30 for EST and CST Clients, and 10:30 for MST and PST Clients) on Fridays as long as the client approves. There may be exceptions to this policy during the busy season or if the client requests otherwise.

- **Time Flexibility**
  Clients may allow staff to start early and leave early. However, this should ensure a minimum overlap or crossover as required. It's crucial to consider the specific role of the staff when making such decisions. Please coordinate with the Account Manager and heed their advice on this matter.

# Values We Believe In

01

Great Quality Talent always
comes at a cost.
(Hiring & Retention)

02

Offshore staff should have
opportunities for advancement in
their career.

03

Quality and
then Productivity.

# CPA Scholarship 2025

| Inclusions | Reimbursement Given |
|---|---|
| Coaching Fees | Eligible for Reimbursement |
| Learning Material / Subscription Fees | Eligible for Reimbursement |
| Evaluation Fees | Eligible for Reimbursement |
| Exam Fees | Eligible for Reimbursement |
| Bridge Course / Notice to Schedule / PTIN - Fees | Eligible for Reimbursement |
| Tenure of Employment | 3 Years |
| Maximum Reimbursement Amount (On Clearing 2 Subjects) | INR 1,50,000 |
| Maximum Reimbursement Amount (On Becoming CPA) | INR 3,00,000 |

# CPA Scholarship 2025

- Eligibility is limited to those who start their CPA or EA after joining the company. Staff already pursuing these qualifications at the time of joining will not be considered.

- Reimbursement will be provided once a staff member clears two subjects or becomes a CPA and completes three years with MYCPE ONE.

- The reimbursement will cover actual expenses up to a maximum of ₹3 lacs.

- No paid leave will be granted for exam preparation or attendance.

# Drop - Off Facility

- Available to all team members of all departments.
- Available for Male - Shifts Ending On or After - 12.00 am and Female - Shifts Ending On or After - 10.30 pm
- Staff should email admin@my-cpe.com in advance to opt in.
- In case of No-Shows more than 3 times, the Drop-Off Facility shall be opted Out Automatically.
- Reimbursement of Personal Ola or Uber booking shall not be allowed.

**For Women's Safety: All Drivers that we have hired, we have done the following due diligence**

- Got an Undertaking of No Accidents or No Crime Records.
- Reference Check.
- Identify and Residence Proof taken.
- Undertaking of No Violation or Preserving Passenger Safety.

# Drop - Off Facility

### Car Availability for Drop-Off

- Staff members shall be prepared to wait for 15 to 20 minutes, as it will be a group departure.
- If a staff member arrives at a time different from their notified shift end time, they will be accommodated only after the current shift members have been onboarded.
- We shall be deploying a car fleet on the basis of the Team members who have opted for Drop-Off and shall increase from time to time.
- Ad-hoc queries of Opt-In or Drop-Off shall not be considered.
- Drop-off shall be as per the route decided by the Admin team.

# EA Scholarship 2025

| Inclusions | Reimbursement Given |
|---|---|
| Coaching Fees | Not Eligible |
| Learning Material / Subscription Fees | Not Eligible |
| Exam Fees | Eligible for Reimbursement |
| PTIN - Fees | Eligible for Reimbursement |
| Tenure of Employment | 2 Years |
| Maximum Reimbursement Amount | INR 3,00,000 |

# Exit Orientation Guidelines

- **Never Burn Bridges if you are going to remain in the same Industry :**
  Relationships are crucial, especially within the confines of a specific industry. Today's colleague could be tomorrow's senior, junior, or boss. Departing on a sour note can have long-term implications, affecting potential opportunities or collaborations in the future. Maintain professionalism and respect, even if you're parting ways.

- **Don't expect a reference if you spoil the relationship :**
  References are testimonials of trust. If the exit process becomes contentious or if the relationship with the employer becomes tarnished, it's unrealistic to expect them to vouch for your skills or character later on. A good reference can often be the difference between landing a dream job and missing out, so always aim to leave on good terms.

- **Process needs to be followed :**
  Companies often have a set exit or off-boarding process, which could include tasks like handing over duties, returning company property, notice period, not taking leave during the notice period, being transparent in your dealings, and attending an exit interview. Adhering to these processes ensures a smooth transition for both the individual and the organization. It reflects one's professionalism and respect for the institution they're leaving.

# Exit Orientation Guidelines

- **There is always a chance to come back :**
  Sometimes, individuals find that the grass isn't greener on the other side and wish to return to their previous employer. If the departure was amicable and bridges were maintained, the door for re-entry remains open. Companies often appreciate the return of former valuable employees, known as "boomerang employees", as they bring back additional experience and perspective.

- **Think of being long-term in this Industry :**
  Industries can often be tight-knit communities where word travels fast. Actions, attitudes, and reputations built today can impact opportunities and perceptions years down the line. By thinking long-term, individuals can make decisions that bolster their reputation and foster trust, setting themselves up for a fruitful and extended career in the sector.

- **Feedback is Golden :**
  An exit interview is a platform for you to share constructive feedback. It's an opportunity for the company to learn and grow. Be honest, your insights might pave the way for positive changes for your colleagues and successors.

# Exit Orientation Guidelines

- **Stay Positive on Social Media :**
  Refrain from posting negative comments or details about your former employer online. In the age of digital connections, these posts can have unintended consequences and reflect poorly on you more than anyone else.

- **Respect Confidentiality :**
  Even after leaving, remember the obligations towards any non-disclosure or confidentiality agreements you may have signed. Keeping trust intact is essential, not just legally, but ethically as well.

- **Transition Gracefully :**
  Assist in the transition process. Offer to train your successor or create a handover/SOP document. This not only aids the company but also reinforces your image as a team player.

- **Keep Networking:**
  Just because you're leaving doesn't mean you sever ties completely. Stay in touch with former colleagues and superiors. A strong professional network is an asset that benefits you throughout your career.

# Exit Orientation Guidelines

- **Acknowledge and Appreciate:**
  Before leaving, take a moment to thank those who've supported and mentored you. A simple gesture of gratitude can leave a lasting positive impression.

- **Avoid Gossip and Backchannel Conversations:**
  If you have grievances or concerns, address them through appropriate channels like HR rather than indulging in office gossip. It's always better to seek resolutions rather than dwelling on or amplifying issues.

- **Stay Open to Revisions and Reconsiderations:**
  If the company offers a counter-proposal or new terms, be open to considering them. It's a testament to your value in the organization. Even if you decide to leave, such discussions can provide insights into your professional worth.

- **Plan Ahead:**
  Before announcing your decision, have a clear plan in place regarding your next steps. Whether it's a new job, further studies, or a sabbatical, it's good to have a direction. This also makes the exit process smoother and less stressful.

# Exit Orientation Guidelines

- **Reflect on Journey and not just Exit :**
  Your journey at any organization is a mosaic of moments, milestones, challenges, and celebrations. While recent events might be most vivid in your memory, it's essential to take a step back and view the bigger picture. Think about the early days, the projects you were a part of, the challenges you overcame, and the friendships and mentorships you forged. Each of these experiences, be it positive or challenging, contributed to your professional growth. As you move forward, carry the entirety of these learnings with you, not just the final moments.

# Gratuity Policy

**Purpose:** Gratuity is a statutory benefit paid to employees as a token of appreciation for their long-term service.

**Eligibility**

**Employee Type:** Permanent employees only.

**Minimum Service:** Any Permanent employee with the company is eligible for gratuity.

- For employees who have worked in an organization but whose service is terminated due to death or disability, gratuity will be payable regardless of the duration of service.

- Gratuity is applicable across departments, designations, and employment levels.

**Gratuity Calculation: 4.81%** of the Basic Salary × Months of Service

**Gratuity Payable:** The amount is processed and paid along with the full & final settlement as per company timelines upon resignation, retirement, superannuation, or in case of unfortunate death or permanent disability.

# Gratuity Policy

**Taxation:** Gratuity is tax-free up to ₹20 lakh under section 10(10) of the Income Tax Act, 1961. Any amount above ₹20 lakh will be taxed as per the applicable income tax rates.

**Nomination:** Employees are required to nominate a beneficiary for the gratuity amount at the time of joining. The nomination can be updated as per the employee’s wishes during their employment.

# Holistic Evaluation

At our company, we recognize that performance is not a linear equation. It's shaped by a variety of factors, including actions, outcomes, and long-term potential. We believe in a comprehensive approach to evaluation-one that not only considers current tasks but also looks toward future growth. Our evaluation process is data-driven, ensuring fairness and objectivity at every step. We’ve established clear criteria that are designed to support both individual and team development, helping our people grow within the company and contributing to our shared success.

- **Tenure of the Company :**
  At our company, we prioritize experience and tenure when considering promotions. While meeting client needs and completing timesheets are crucial, we place a strong emphasis on tenure for appraisals. Our focus is on fostering stable, long-term growth, and we provide consistent opportunities for professional development over time.

- **Escalation/Appreciation:** Number and the type of escalation/appreciation you received from the client/manager.

- **Warning/Discipline Issues:** Where have there been any warning or discipline issues with the staff member in the past for his conduct

# Holistic Evaluation

**Productivity & Quality :**

We expect staff members to have good productivity overall in their timesheets. (Quality First, however, Productivity is still a very important consideration)

- Performance in L&D Initiatives and upskilling
- Client Onboarding Experience. (Feedback).
- Feedback from the Operations Manager and the Customer Success Advisory team
- The existing skill set of the staff member. (Technical, Managerial, Communication, or Others)
- Individual Pursuing CPA or EA and its completion.

# Ideas and Suggestion Framework

**Objective:**

The objective of an idea suggestion policy is to create a structured process that fosters a culture of innovation, improves business processes, enhances employee engagement, drives business growth, and retains talented employees. At MYCPE One, we believe that great ideas can come from anyone, regardless of their position or seniority. That's why we've implemented an idea suggestion policy to encourage you to share your innovative ideas and insights.

**Importance:**

We want to give employees a platform to share their ideas, which fosters a sense of ownership and engagement in the organization. We want the employees to think outside the box and generate creative and innovative solutions to problems. When employees feel that their ideas are valued and heard, they are more likely to come forward with new and potentially game-changing ideas.

# Ideas and Suggestion Framework

**Reward:**

Staff sharing innovative ideas are appropriately rewarded for their positive action in the interest of the company.

**Reporting Mechanism:**

In Team Hub under the Feedback option, you can select the Idea/Suggestion category. If you wish to stay anonymous, this would be visible to Shalin Parikh & Valay Parikh only. Alternatively, reports can be submitted via email to shawn@my-cpe.com & valay@my-cpe.com.

# Ideas and Suggestion Framework

**If you have an idea that you think would benefit the company, we encourage you to follow these steps:**

Take the time to clearly articulate and document your idea, including any relevant information or data.
Submit your idea through Team Hub as mentioned above.
We will communicate the outcome of your idea submission within a reasonable timeframe, keeping you informed every step of the way.
In case the idea doesn’t get selected or implemented in real time, it may be implemented in the future; hence, please don’t get discouraged.

We're grateful for your contributions to our company's success, and we welcome your ideas. We're looking forward to hearing from you soon.

- Client Onboarding Experience. (Feedback).
- Individual Pursuing CPA or EA and its completion.
- Feedback from the Operations Manager and the Customer Success Advisory team
- The existing skill set of the staff member. (Technical, Managerial, Communication, or Others)

# IT Infrastructure and Set Up

**Default Set up**

- 19” Monitor (HD) (Dual Screens)
- Processor (Intel i5) | RAM 8 GB | SSD 120 GB
- MSI Motherboard - MSI – H410MV – HDMI & VGA
- Mouse - Logitech wired
- Keyboard - TVS Gold
- Noise Cancellation Headset (Grandstream) | Krisp app installed (for Noise Cancellation)
- HD Webcam (1080 Pixels)
- Licensed Windows OS Installed with MS Suite
- Google Chrome
- VNC Software Installed (For Remote IT Support)
- LAN Connection on Each Desk (One Phone and One Computer)
- Mobile Phone (On Request for Dual Authentication)
- Zoom (Free Version)
- Firewall - TZ series (SonicWall) for Managing Websites, Security, and Internet Load
- 7-Zip
- USB Disabled
- Seqrite Antivirus

# IT Infrastructure and Set Up

**Additional Set up Available on Client Request (Additional Cost)**

- Office 365 | (Web Version)
- Office 365 | (Web Version & Desktop Version) (WFH)
- Employee Monitoring Software (Insightful) (WFH)
- Licensed Office 365 | (WFH Monitoring)
- Zoom & Calendly (Premium)
- VOIP (Calling & Text App with US Number)
- Adobe DC Pro
- Desk Phone | Desk Phone - with EPBX
- Extra Screen 19”
- Slack or Other Chat System
- Krisp (Noise Cancellations)
- Able to Extract (PDF to Excel Converter)
- Yubico (Yubi Keys - Dual Authentication)
- TeamViewer (Individual License)
- EndPoint Device Management (Mobile/Laptop)
- Any Additional Hardware or Software
- Additional or Special (Laptop or Headphones)

# IT Infrastructure and Set Up

**IT Setup Information required from client:**

- Whitelist our IP/Domain to restrict access. (Our Team shall give you a list of IPs) (Our Domain – my-cpe.com)
- VPN/RDP/Cloud - That has been set up on your end, please share credentials with us.
- If you are using the cloud, try to give direct access. (RDP lags and reduces productivity).
- Set up the email ID of selected staff/s on your domain and share their credentials. This is to ensure that everything remains within your domain and server/system.
- For all the tools/software access, send all invitations to the newly created email ID (on your domain) for your offshore staff. If you have already created their accounts for tools/software, simply share the ID and Password with us.
- Let us know what application/hardware you want us to install, and we shall buy/subscribe to that for the staff.

# IT Infrastructure and Set Up

**IT Setup Information required from client:**

- Client with Dual Authentication Requirements. Please add specific instructions for RDP or Authenticator, which we may need to use and configure.
- Duo Security | Microsoft | Google Authenticator | MFA | Last Pass
- Company Mobile will be given to the Staff for Dual Authentication.
- Please share the IT contact information to connect with them if they face any challenges connecting to a remote computer.
- Please let us know if anything that you would like to include or exclude.

# Loan to Team Member

**Eligibility:**
1 Year of completion with the company.

**Eligible Purpose:**
Medical Expense in family, Marriage, House Purchase/Renovation, or such other necessary/expedient reasons only.

**Eligible Amount:**
40% of CTC if you completed 1 year
60% of CTC if you have completed 2 years
80% of CTC if you have completed 3 years

**Rate of Interest:**
0%

**Repayment:**
12 months to 24 months (Company shall be flexible on this)

**Apply through Employee Portal:**

- To apply for a loan, you will need to provide details such as the amount required, repayment plan, installment details, purpose of the loan, approval from your reporting manager, and necessary supporting documents.

- The HR department will review the application, verify eligibility, and process the documentation within 7 to 10 days upon approval.

- Required documents include the loan agreement, three signed blank cheques, and the application with supporting evidence. The loan agreement will be e-signed for final processing.

# Managed Fees Model Transition Guidelines

**TRANSITIONING TO MANAGED FEES MODEL & CHANGING POLICIES**

Shifting to a managed fee model provides greater flexibility in shaping compensation structures, HR policies, and work arrangements, ensuring compliance while benefiting staff members. However, there are a few critical aspects to keep in mind during this transition:

- **Cultural and Contextual Understanding:** The work environment, employee expectations, and operational dynamics in India and the Philippines may differ from those in the U.S. or Canada. Adapting policies accordingly is crucial.
- **Maintaining Existing Benefits:** Any new policies should at least match the benefits currently provided. Reducing benefits could negatively impact perception and employee morale.
- **Legal Compliance:** While policies may align with U.S. regulations, they must also comply with local labor laws in India and the Philippines to avoid any legal complications.

# Managed Fees Model Transition Guidelines

- **Focus on Continuity:** Changes should be implemented gradually to ensure smooth transitions and long-term stability. A well-planned approach will enhance acceptance and effectiveness.

- **Change in Policy:** Whenever implementing any policy or guideline changes, especially those with financial implications, ensure they are communicated well in advance. It is crucial to build buy-in from stakeholders and, if possible, consult with us before making any adjustments. Additionally, aim for long-term stability and avoid frequent changes to maintain consistency and trust within the team.

# Managed Fees Model Transition Guidelines

**OFFSHORE STAFF LEAVES ARE HIGHER THAN ONSHORE TEAM**

Our current policies include 18 paid holidays and 10 PTO days as part of our standard offerings. It's essential to address any misconceptions that these benefits are additional—they have been an integral part of our policies from the outset. For the client moving to a managed fee model, intending to change policies, to ensure clarity and consistency, let's take steps to communicate this effectively moving forward. When implementing or revising leave policies for offshore, it's crucial to keep the following considerations in mind:

- **Gradual Transition:** Any changes should be implemented in a phased approach to ensure a smooth transition and minimal disruption for employees. Sudden overhauls can lead to confusion and resistance.

- **Cultural Alignment:** Policies must respect and align with the cultural norms of the region. For instance, in some countries, certain types of leave and benefits are culturally expected and highly valued.

# Managed Fees Model Transition Guidelines

- **Regulatory and Legal Compliance:** Policies must strictly adhere to the legal and regulatory requirements of the region, such as the Leave and Gratuity Act, labor laws, or equivalent frameworks. This ensures compliance and avoids potential legal risks.

- **Minimum Standards and Progression:** All policies should meet or exceed existing standards. There should never be a reduction in benefits. Instead, they should be designed to progressively enhance the overall employee experience.

- **Competitive Benchmarking:** It's vital to evaluate and match or surpass what competitors in the industry and region are offering. This ensures we remain an attractive and competitive employer in the market.

- **Employee working Opposite Hours:** In India and the Philippines, employees working opposite hours from their normal routines often face unique challenges, especially when adapting to night shifts or other unconventional working hours. So usually they don't get any time to spend with family on weekdays, and festivals and holidays are the only times when they can do the same.

# Managed Fees Model Transition Guidelines

## APPRAISAL & PROMOTION CYCLES

- Our standard appraisal and promotion cycle runs from April to April, aligning with our productivity bonus system, where staff receive annual bonuses based on productive hours worked. This structure has been in place to ensure consistency and motivation among employees.

- We have received multiple requests to align the appraisal cycle with the U.S. calendar year (December to December or January to January). While we have continued with our existing system, clients transitioning to a managed fee model have the flexibility to modify this as needed.

- Our rationale for maintaining the April cycle is that employees generally avoid switching jobs in December or January, just before the tax season. Instead, they typically complete the tax season, receive their raise in April, and then consider switching jobs-often securing another raise in the process.

- If you choose to make this change, ensure clear communication well in advance to gain employee buy-in and facilitate a smooth transition.

# Managed Fees Model Transition Guidelines

**TERMINATION – 2-MONTH NOTICE PERIOD - APPRAISALS**

- Under the hourly rate model, if a staff member did not perform well, primarily due to competency concerns, we might have provided a replacement, or we would have waived 9 weeks' notice fully or partially. However, under the managed fee model, unless a staff member has violated policies or there are conduct or disciplinary issues, we are required to honor a two-month notice period, even in cases of competency or skill-related challenges. This means that the notice period and proportionate fees must be paid, with no exceptions. As a result, greater stringency in policy enforcement is necessary to ensure smooth operations and compliance with the transition. We cannot have our goodwill damaged because a 2-month notice period is both ways as per the employment agreement.

- If a new hire is being onboarded-meaning they have not previously worked with MYCPE ONE and are being offered a position directly on behalf of the firm-a probation period may be imposed. This probation period can range from 2 months to 6 months, during which termination can be executed with a 24-hour notice if necessary. However, while this provision serves as a safeguard, it should not be exercised arbitrarily, as maintaining the company's goodwill remains a priority. Post completion of the Probation period, the new hire is deemed confirmed. Upon completion of the probation period, the standard notice period applies.

# Managed Fees Model Transition Guidelines

**TERMINATION – 2-MONTH NOTICE PERIOD - APPRAISALS**

- For experienced professionals with four to five years or more of industry experience, probation periods may be met with resistance due to concerns over job security. In both India and the Philippines, job stability is a critical factor in employment decisions, and culturally, abrupt termination without a notice period is not widely accepted. Therefore, while probationary terms can be useful for fresh hires or hires with 1 to 2 years of experience, they should be applied judiciously with experienced hires, considering market expectations and local employment norms.

# Medical Insurance 2025

- Coverage up to ₹4 Lakhs under a floater policy.
- All employees are covered under this policy.
- Maternity expenses are covered from ₹60,000 to ₹75,000.
- IVF is also covered. (It is added, looking at the trend or life cycle of employees)
- Applicable for self, spouse, two children, and two parents (or parents-in-law, for employees who completed one year as of March 31, 2024).
- In case of hospitalization, inform HR and notify the TPA/agent via email. Assistance is available through the Pazcare.
- Two company-paid medical checkups per year, in June and December.
- The company is not responsible for claims that are partially approved or rejected for any reason.
- HR will assist with claim filing and follow-ups.
- HR will coordinate with the TPA/agent. Employees must submit all required documents to the TPA, either online or offline.

# Pregnancy and Maternity Leave Policy

- **Purpose:** This policy aims to support pregnant employees by providing clear guidelines on their rights regarding maternity leave, workplace accommodations, and related benefits. MYCPE One is committed to creating an inclusive, supportive, and respectful environment for all employees, ensuring equal opportunity regardless of pregnancy status.

- **Scope:** This policy applies to all employees who are legally entitled to maternity benefits under Indian law, including permanent and probationary employees.

- **Non-Discrimination:** We are committed to ensuring that all employees are treated fairly and equally. Pregnancy, childbirth, and related medical conditions will not be grounds for discrimination in hiring, promotion, or any other employment decisions. Any employee experiencing discrimination based on pregnancy should report the issue to the HR department.

# Pregnancy and Maternity Leave Policy

- **Maternity Leave Entitlements:** In accordance with the Maternity Benefit Act, 1961, employees are entitled to:

  **Duration:** A total of 26 weeks of paid maternity leave (for the first two children). For the third child and beyond, an employee is entitled to 12 weeks of maternity leave.

  **Eligibility:** Employees are eligible for maternity leave if they have worked with MYCPE ONE for at least 80 days in the 12 months immediately preceding the date of delivery.

  **Leave Timeline:** Maternity leave can be availed before or after delivery, but a maximum of 8 weeks may be taken before the expected date of delivery.

- **Paid Leave and Benefits During Maternity Leave:** Employees on maternity leave will receive their full salary as per the terms of employment during the 26-week period (or 12 weeks for third child and beyond). The salary will be paid as per the regular payroll schedule.

# Pregnancy and Maternity Leave Policy

- **Health and Safety:** MYCPE ONE is committed to providing a safe and supportive work environment during pregnancy. If an employee's pregnancy creates any health or safety concerns, the employee should inform HR to explore adjustments or accommodations that may be needed. This could include:
  - Modifying tasks that could pose health risks.
  - Providing flexibility in working hours or location if necessary.
  - Temporary reassignment to less physically demanding duties if required.
- **Return to Work:** After maternity leave, employees will be entitled to return to their previous position or a comparable role within the company. MYCPE ONE will make reasonable accommodations to support the employee's transition back into the workplace. Employees who return after maternity leave will not face any disadvantage in terms of career progression or salary.
- **Lactation and Breastfeeding Support:** In compliance with the Maternity Benefit Act, MYCPE One will provide suitable arrangements for employees who need to express breast milk during working hours. This may include providing a private, hygienic space for breastfeeding or expressing milk. Employees are entitled to two breaks during working hours for lactation for up to one year after childbirth, in addition to regular break times.

# Pregnancy and Maternity Leave Policy

- **Confidentiality and Privacy:** We respect the privacy of our employees. All personal information related to pregnancy and medical conditions will be kept confidential and will only be shared with relevant parties (e.g., HR, immediate supervisor) as necessary to ensure compliance with this policy and support the employee's needs.

- **Flexible Work Arrangements:** Employees returning from maternity leave may request flexible working arrangements (e.g., part-time work, remote work) based on their individual needs. Requests will be considered on a case-by-case basis, subject to the company's operational needs.

- **Adoption and Surrogacy:** The maternity leave provisions in this policy also extend to female employees who legally adopt a child under the age of 3 months or are commissioning mothers through surrogacy. These employees are entitled to the same maternity leave benefits as biological mothers.

- **Reporting and Documentation:** To avail maternity benefits, employees are required to notify HR at least 8 weeks before the expected date of delivery. Employees must submit a medical certificate and/or any required documentation confirming their pregnancy and expected delivery date.

- **Conclusion:** MYCPE ONE is dedicated to ensuring that employees experience a smooth and supportive transition during pregnancy and return to work. We encourage open communication and strive to provide a conducive work environment for our employees at all stages of their pregnancy and beyond.

# Productivity Bonus

- Productivity remains a key focus, as clients have flagged it, and it is critical to retaining them. With seasonality in mind, we must ensure that staff work overtime during peak seasons to meet demand.
- We've started onboarding On-Demand Clients, where clients do not need to allocate specific hours, but we must maintain high productivity to avoid losing clients as we have in the past.
- Client expectations are rising, and quality team members need better opportunities for growth and advancement.
- The time it takes for staff to get ready or train for client work is currently too high and needs to be reduced for faster deployment and higher efficiency.
- Moving forward, team members should be actively working and not just reporting availability or logging false billable hours. We should be paid for the actual work done, not for idle time. If more work is available from existing clients within the same timesheet, we should take it on to boost productivity.
- Whenever possible, we should aim to take on Additional work from existing clients within the same timesheet, if available. This not only helps us maintain client satisfaction but also boosts productivity by maximizing the use of allocated hours.
- We wanted to be consistently productive.

# Productivity Bonus

## PRODUCTIVITY ANNUAL BONUS %

| Productivity Annual Bonus % (Hours) | % of Package |
|---|---|
| 1600 to 1699 | 2.50% |
| 1700 to 1799 | 5.00% |
| 1800 to 1899 | 7.50% |
| 1900 to 1999 | 10.00% |
| 2000 to 2099 | 12.50% |
| 2100 to 2199 | 15.00% |
| 2200 | |

# Productivity Bonus

- **Bonus Payment:**
  Bonus gets accrued annually. The bonus is % is of your salary. (On Gross Last Drawn Annual Package as on December). Payment for the productivity bonus is paid on or before the 8th of March in the following year. In case you resign or leave on or before 28th February of the following year, you will not be eligible for bonus payment. Bonus cycle will be from January 1st to December 31st.

- **Overtime Leaves Balance is Extra:**
  This is over and above overtime leaves. (So if you are able to give Productive hours even after utilizing some or all OT leaves, then you shall be eligible for a productivity bonus.)

- **Productivity Bonus in Case Of Escalation:**
  In the event of an escalation, the Productive hours for those two weeks will be reduced.

# Productivity Bonus

- **Productivity Considered on Billed Hours and Not Actual:**
  Productivity is considered on “Billed Hours” to clients, not the “Actual Hours” hours worked, “Worked in Office”. (However, this excludes hours spent on learning and development (L&D), time available for work, time not available for work, and time spent in Internal meetings/events, etc). Actual hours worked may be a bit less as well.

- **Client Doesn’t Approve :**
  If, for any reason, the client disallows certain hours to be considered billable. We have to deduct the same from your Productivity Hours.

# Productivity Bonus

## How Annual Productivity Threshold hours stack against no. of available hours?

| Description | Value |
|---|---|
| Gross Working Days (365 – 105 Saturdays & Sundays) | 260 |
| Less: Public Holidays | -10 |
| Less: Paid Time Off (2 Weeks) | -10 |
| **Net Working Days** | **240** |
| No. of Hours Working/Day | 8 |
| **Total Working Hours a Year** | **1920** |
| Annual Productivity Threshold (Hours) | 1600 |
| **Annual Productivity Threshold (%)** | **83.33%** |

# Quick Highlights – Offer Letter/Employment Agreement

- Minimum 2-Year Commitment
- Notice Period of 60 Days
- 18 Leaves + 10 Public Holidays
- Saturday & Sunday Holiday
- Leave Encashment. (For April to March paid in the following May)
- Tax Season (15th Jan to 15th April and 15th August to 15th October) Night Allowance Extra
- If (Saturday/Sunday Working) (Extra Pay)
- Maternity Leave (26 Weeks Paid Leave + 13 Weeks LWP)
- Work Timings – Male : Minimum upto 12 AM IST / Female : Minimum Upto 11 PM IST
- Paternity Leave ( 2 Weeks)

# Quick Highlights – Offer Letter/Employment Agreement

- Drop Off Facility Available to all
- Security Cheque: We collect Security Checks to be compliant with Regulations
- Additional Data Security Undertaking in case of WFH/Hybrid working
- 3 Months Probation period for New Recruits.
- No mobiles in work areas.
- Data Security - Client Confidentiality Core
- Medical Insurance - Up to 4 lacs for Self, Spouse & 2 Kids (Floater) + 2 Company Paid Health Check-up

# Staff Non-responsive Or Absconding

**Anticipated Attrition:**

Based on Customer Managers and OTC Managers' connections & interactions with the team members, if they feel a staff member is planning to resign, they should flag the same in the ERP system as “Anticipated Resignation” or “Anticipated Absconding”. The same would remain confidential.

**Reporting for Absconding :**

In the event that a staff member is on unreported or unannounced leave, immediate action is required from the manager. If there is no communication via email from the individual on the same day, efforts should be made to ascertain their whereabouts promptly. The OTC or Customer Success team, as applicable, should initiate emails/calls/whatsapp. If the staff remains unresponsive, it should be promptly marked as "Non-Responsive" on the same day of the unreported and unplanned absence. If the status persists the following day, the classification should be updated from "Non-Responsive" to "Absconding" by the OTC Team, and a report should be submitted to the HR/Admin/CRM/IT/Recruitment/Finance team. (An automated email from ERP would be a better option)

# Staff Non-responsive Or Absconding

**Strict Action for Absconding :**

HR/Admin shall send out emails, calls, and WhatsApp messages to the concerned person to provide intimation. However, after 3 days, HR shall send an email stating that if the person doesn't report back, we shall submit the case to the legal team. Within 7 days, we should initiate legal action from the Legal team as well.

**Message to Team Members on Absconding :**

As a multinational company, we want to emphasize the importance of adhering to the agreed-upon notice period. This commitment is a mutual understanding between you and the company as part of the employment agreement, and it plays a crucial role in maintaining a smooth transition.

- We've encountered situations where some team members have chosen to "abscond." We urge each team member to consider the long-term implications of such decisions on their career. Unless absolutely unavoidable, this is not a choice that fosters positive goodwill or reflects well on your professional reputation.

- While we are prepared to take necessary legal actions in such cases, we want to stress that we understand unforeseen circumstances, such as medical emergencies, and are willing to consider these situations with a certain level of flexibility. In cases where it's feasible, we may grant early relief.

- However, we strongly discourage choosing the path of "absconding" as it does not align with making the right choices for your career.

# Team Outing/Get Together Allowance

**Boosts Employee Morale:**
Team outings provide a break from routine work, boosting overall employee happiness and motivation.

**Enhances Team Bonding:**
Allows team members to build stronger relationships and trust, improving collaboration and communication.

**Fosters Positive Workplace Culture:**
Promotes a sense of community, helping employees feel valued and appreciated by the organization.

**Reduces Work Stress:**
Gives employees a chance to unwind and de-stress, contributing to better mental health and overall well-being.

**Encourages Creativity:**
A change of environment can spark fresh ideas and new perspectives, benefiting innovation and problem-solving.

**Employee Retention:**
Offering outings shows a company's investment in its employees, helping to improve retention and reduce turnover.

# Team Outing/Get Together Allowance

**Improves Productivity:**
Post-outing, employees often return with renewed energy and focus, leading to higher productivity.

**Company Paid: Flat 6500 per employee per year**

- Staff Joined between April - Sept – Gets Rs. 6500
- Staff Joined between Oct - Mar - Get Rs. 3250

**Client Paid**

- $100 = Rs 8000 Annually Maximum Allowed
- The Actual Amount shall be as per Client Approval. (Only if Client Approves)

# Team Outing/Get Together Allowance

## TEAM OUTING ALLOWANCE – Reimbursement Process

- Bills/Invoices Need to be Provided
- The Annual Cycle is from April to March.
- No Accumulation, No Carried Forward or Encashment.
- Actual Expense if Incurred is less than the lesser amount, would be reimbursed.
- No Advance Payment.
- No Non-Veg Food/Alcohol shall be allowed.
- Once you have incurred, submit an Invoice and Claim Reimbursement.

# Team Outing/Get Together Allowance

**TEAM OUTING ALLOWANCE – Reimbursement Process**

- Can be utilized in Dinner/Lunch/Birthday Celebration/Outing/Movie/Trips, etc
- Should be claimed by the Manager as Reimbursement.
- The Reimbursement Form shall be filled out online.
- Submitted to the HR Team and shall be processed in the 2nd Payment Cycle.
- Client Paid shall be given only if approved by the client.
- It's a Team Activity, and individuals can't claim.
- Includes Gifts Given by Managers or Teams to Team Members on Birthdays, or Cakes Bought on Birthdays, etc.

# Violation – Unprofessional – Disorderly Conduct 2025

“

*Let’s respect the **rules of the game and the ground** we are playing on. You may disagree with some of those. However, we respectfully agree to disagree and commit. Tomorrow you may be leading an organization/team, and put yourself in those shoes and imagine.”*

”

- These guidelines are designed to foster a culture of accountability, discipline, and professionalism within the organization. All employees are expected to adhere to these guidelines to ensure that the workplace remains efficient and respectful for everyone. As we move forward, maintaining a trustworthy environment for our clients will be critical to our long-term success and continued partnerships.

- As we transition into the era of Global Capability Centers (GCC) and continue working with large corporations, it is imperative that we cultivate a trustworthy and transparent environment for our clients. The expectations from clients are growing, and they expect us to deliver high-quality work consistently. Building a culture of trust internally will reflect externally in our client relationships, ensuring we maintain their confidence and continue to grow together.

# Violation – Unprofessional – Disorderly Conduct 2025

- It has come to our attention that some team members, OTC Managers, and Customer Success Managers have been using mobile phones inappropriately and misrepresenting attendance and OT Balances with the assistance of one or more team members. We request that all employees adhere strictly to the company’s guidelines, ensuring a culture of discipline and professionalism. This includes the following guidelines on no mobile phone usage, mis-punching, buddy punching, attire, and other relevant workplace behaviors. It is essential that everyone upholds the company’s values and works together to maintain a professional and efficient environment.

- The guidelines outlined on the next pages should be viewed as our effort to inculcate the right behaviors and not as creating inconvenience to our team members with undue pressure. The penalties collected from all the unfortunate instances of non-compliance will be leveraged for different social causes. We envision a world where all the anticipated behaviors would have become a way of life without any reminders, and consider that these guidelines would pave the path to get there.

# Violation – Unprofessional – Disorderly Conduct 2025

## 1. No Mobile Phone Usage:

Personal mobile phones must be kept on silent or vibrate mode outside the work area in the locker during working hours and used only in designated areas.

**Penalty for Employees:**

- First Offense: Rs. 250 will be deducted.
- Second Offense: Rs. 500 will be deducted and a warning Will Be Issued.
- Third Offense and each Repeated Offense thereafter: Rs. 1,000/- fine and potential further disciplinary action.

**Manager's Responsibility:**

- Managers are responsible for monitoring mobile usage within their teams and ensuring that employees are following this policy.
- If the manager does not address mobile phone usage violations, He would be penalized with higher penalties for repeated instances.
- Penalty for Managers: Rs. 1500 fine for failing to enforce the policy. For each 3 instances in his team.

# Violation – Unprofessional – Disorderly Conduct 2025

**Guardian of the mobile phone usage guidelines:** OTC, IT, HR & and Admin.

- There will be a random inspection on the floor, and in case there are any violations, then the action will be taken as per the above guidelines.

# Violation – Unprofessional – Disorderly Conduct 2025

## 2. Timekeeping and Attendance (Buddy Punching, Mis-Punching):

Buddy punching and mis-punching are strictly prohibited. Accurate time reporting is essential for record-keeping and Attendance.

**Penalty for Employees:**

**Buddy Punching:**

- First Offense: Warning.
- Second Offense: Rs. 500 fine.
- Third Offense and each Repeated Offense thereafter: Rs. 1,000/- fine and potential further disciplinary action

**Mis-Punching:**

- First 3 Offense (Unintentional): Nothing.
- First Intentional Offense: Warning
- Second Intentional Offense: Rs. 250/- fine
- Third Offense and each Repeated Offense thereafter: Rs. 500/- fine and potential further disciplinary action.
- The above penalties are over and above the disallowance of OT, Night Allowance, or Leave Encashment.

# Violation – Unprofessional – Disorderly Conduct 2025

**Manager's Responsibility:**

Managers are expected to review time records regularly and ensure that all team members are adhering to the correct timekeeping practices. If violations are found and not addressed, managers will face a higher penalty:

It may range from 1500 for every 3 instances.

**Guardian of the Timekeeping and attendance guidelines:**

Respective OTC, HR, and Admin

# Violation – Unprofessional – Disorderly Conduct 2025

## 3. No eatables in Work Areas:

Eating at workstations or in client-facing areas is prohibited to maintain cleanliness and hygiene in the workplace. Allowing food in these areas can lead to hygiene issues and create an unprofessional environment. Therefore, we have strictly prohibited eating in these spaces.
Bags shall also be prohibited from being brought into the work area.

**Penalty for Employees:**
**Buddy Punching:**

- First Offense: Warning.
- Second Offense: Rs. 250/- fine for eating or drinking in inappropriate areas.
- Third Offense and each Repeated Offense thereafter: Rs. 500/- fine and potential further disciplinary action

**Manager's Responsibility:**

- Managers should ensure that employees adhere to food and drink policies. If the manager does not address violations, they will face the following higher penalties:
- Penalty for Managers: Rs. 500 fine for each 3 failures of the team members to enforce the policy.

**Guardian of these guidelines:** Respective OTC, HR, and Admin.

# Violation – Unprofessional – Disorderly Conduct 2025

## 4. Creating disturbance on the Floor:

Employees should avoid speaking loudly or creating any other sort of disturbance in the client success team sitting rooms, especially during nighttime.

**Penalty for Employees:**

- First Offense: Warning and reminder of the policy.
- Second Offense: Rs. 500/- fine.
- Third Offense and each Repeated Offense thereafter: Rs. 1,000/- fine and potential further disciplinary action

**Manager's Responsibility:**

- Managers are responsible for ensuring employees respect the quiet zones and do not disturb the office environment. Managers who fail to monitor and address loud phone conversations will face a higher penalty:
- Penalty for Managers: Rs. 1000 fine for failure to address ongoing issues.

**Guardian of these guidelines:** Respective OTC, HR, and Admin.

# Violation – Unprofessional – Disorderly Conduct 2025

## 5. Professional Attire:

Employees are expected to maintain professional attire at all times, adhering to the company dress code.

**Penalty for Employees:**

- First Offense: Warning and reminder of the policy.
- Second Offense: Rs. 250/- fine.
- Third Offense and each Repeated Offense thereafter: Rs. 500/- fine and potential further disciplinary action.

**Manager's Responsibility:**

- Managers must ensure their teams are aware of and comply with the dress code policy. Managers who fail to address non-compliance will face a higher penalty:
- Penalty for Managers: 1000 fine for failure to enforce the dress code.

**Guardian of these guidelines:** Respective OTC, HR, and Admin.

# Violation – Unprofessional – Disorderly Conduct 2025

Monitoring like a principal in a school, issuing warnings or penalties, and following up on these small things, such as tutoring a kid, is not what we would like our workplace to be. Neither HR team is here for, nor do we think your valuable time shall be invested in this.

We had previously ignored violations of mobile phone use, having snacks in the work area, and coming to the office in sandals and chappals, etc., and we have not paid attention to these things. But we are a different company now; this is a workplace.

While there's room for individuality and personal expression, it's crucial to strike a balance and ensure that our actions do not disrupt the environment or reflect poorly on our company. Imagine if we continue to allow, what a workplace would look like. Some examples of disorderly conduct.

# Violation – Unprofessional – Disorderly Conduct 2025

**Some examples of disorderly conduct:**

- Spitting Chewing Gum in Urinal Pot
- No documentation for Leaves
- Unplanned & Unreported Leaves
- Unorganized chair after use
- False reporting in the timesheet
- Punching Manipulations
- Too Many/Pro Long Breaks
- Not Reporting to Clients
- Misbehavior with staff
- Harassment, Abuse
- Confidentiality breaches
- Insubordination
- Coming in Slippers/Chappals
- Spending hours on mobile devices
- False reporting of working hours in the timesheet
- Casual T-Shirts
- Inordinate clothing attire
- Tuck Out Shirts
- Unauthorized Data access
- Mobile usage
- Taking bags on the Floor
- Shouting on the Floor
- Physical Damage to Assets
- Using slang in the workplace

# Violation – Unprofessional – Disorderly Conduct 2025

**More examples of disorderly conduct:**

- Having a snack in the work area
- Punctuality in working
- Being disrespectful
- Coming to the Office with substance consumption
- Running Team as Friends Circle
- Installing plugins or extensions
- Moving company assets without prior approval
- Gutka/Masala eating in the workplace
- Log in to your personal mail ID from the Office
- Sharing their own passwords
- Not sending the client timesheet
- False reporting in the client timesheet
- Playing YouTube/ browsers for songs/ clips
- Downloading and saving media folders of songs/other unapproved content
- Using a computer for playing games, which is either preinstalled
- Non-English language communication (Managers/Senior Team)
- Inappropriate sitting postures are seen in late-night shifts or when working alone

# Voicing Concern Guidelines

**Objective:**

The objective of the guideline is to improve the implementation of policies in the company and provide a mechanism for employees, stakeholders, and other parties to raise concerns about unethical, illegal, or improper conduct that may harm the organization, its employees, or stakeholders. The organization is committed to promoting a culture of integrity, transparency, accountability, and faster implementation.

**Reporting Mechanism:**

In Team Hub under the Feedback option, you can select the Concern category. If you wish to stay anonymous, this would be visible to Shalin Parikh & Valay Parikh only. Alternatively, reports can be submitted via email to shawn@my-cpe.com & valay@my-cpe.com. Please provide relevant proof of reporting to aid in the investigation.

**Confidentiality:**

All reports will be taken seriously, investigated promptly, and treated confidentially to the extent possible. However, the organization cannot guarantee complete confidentiality, and reporters should be aware that their identity may be disclosed in some circumstances.

# Voicing Concern Guidelines

**Protections for Voice Raisers:**

It is the policy of the organization to encourage and protect Voice Raisers who report in good faith concerns about unethical, illegal, or improper conduct. The organization will not tolerate retaliation against Voice Raisers who report concerns in good faith. Any employee who retaliates against a Voice Raiser will be subject to disciplinary action, up to and including termination. Trust tellers who believe they have been retaliated against should report the retaliation immediately to the hotline or their supervisor.

**No Personal Vendetta:**

Staff are prohibited from using the reporting mechanism for personal vendettas or to make false accusations. Any staff member who is found to have used the reporting mechanism for personal gain or to make false accusations may be subject to disciplinary action, up to and including termination. The organization reserves the right to take legal action against any whistleblower who makes false accusations with malicious intent.

# WFH-Hybrid Checklist

- Client Approval in Writing is required. (If the Client hasn't approved, we can't allow it as per the contract.)
- Additional Data Security & Confidentiality Undertaking in writing given by Staff. (Shared with Client)
- EndPoint Device Management (Desktop/Laptop)
- Dedicated Workspace in the House (Can't Work from Couch/Bed/Dining Table)
- Compulsory Installation Insightful - Employee Monitoring App.
- Activity, Attendance, and Workflow Monitoring Through Insightful App.
- Dedicated Internet Line to be Taken from Approved Providers. (Internet line to be provided by Company only, Personal Line Not Allowed)
- The workstation shall be IP locked. (Get it Whitelisted from the Client Side as well.) (As IP Locked staff can't work from Starbucks, a Restaurant, or any other place)

# WFH-Hybrid Checklist

- Dedicated Monitoring, Browsing, and Other Activity Alerts. (WFH/Hybrid working Computers) (Monitoring of Computer Activity - On a Daily Basis - Through Insightful & IP Tracking.)
- The computer is set up on our centralized domain controller. (We can control all our devices remotely and lock them in case of compromise)
- Additional Layers of Firewall Protection - TZ series (Sonicwall) for Managing Websites, Security, and Internet Load.
- Laptop Device Management to be Installed. (In case the Laptop is given)
- Antivirus is installed and updated from Time to Time on all devices.

# Why CPA or EA?

The Knowledge Process Outsourcing (KPO) industry in India is experiencing rapid growth, offering multi-decadal opportunities for professionals seeking diverse career paths. Whether you choose the CPA or the EA, both certifications are excellent choices for advancing your career in offshore accounting and tax services within the KPO industry. The decision depends on your area of interest if you want to focus more on broader accounting practices, auditing, or financial consulting, a CPA might be the better option. If your focus is purely on tax, especially dealing with U.S. clients and tax-related matters, EA would be the ideal path.

### Having one of these credentials can lead to

- Global Recognition and Credibility
- Specialized Knowledge in the field of accounting, auditing, and Tax
- Better Career Advancement Opportunities
- Increased Earning Potential
- Competitive Advantage
- Exposure to Global Clients

# Work Timings

## GENERAL CLIENT WORK TIMINGS

| Time Zone | Roles | EST Clients | CST Clients | MST Clients | PST Clients |
|---|---|---|---|---|---|
| **Indian Timings** | Non-End Client Facing Roles (Limited Client Interaction) | 1.00 pm to 10.00 pm | 1.30 pm to 10.30 pm | 2.30 pm to 11.30 pm | 3.00 pm to 12.00 am |
| **US Timings** | | 3.30 am to 12.30 pm | 3.00 am to 12.00 pm | 3.00 am to 12.00 pm | 2.30 am to 11.30 am |
| **Overlap/ Crossover** | | 4.30 hours | 4.00 hours | 4.00 hours | 3.30 hours |

# Work Timings

## GENERAL CLIENT WORK TIMINGS

| Time Zone | Roles | EST Clients | CST Clients | MST Clients | PST Clients |
|---|---|---|---|---|---|
| **Indian Timings** | End Client Facing Roles (Client Interaction Needed) | 5.00 pm to 2.00 am | 5.30 pm to 2.30 am | 6.00 pm to 3.00 am | 6.30 pm to 3.30 am |
| **US Timings** | | 7.30 am to 4.30 pm | 7.00 am to 4.00 pm | 6.30 am to 3.30 pm | 6.30 am to 3.30 pm |
| **Overlap/ Crossover** | | 8.30 hours | 8.00 hours | 7.30 hours | 7.00 hours |

# Other Policies

- A drop-off facility/Shuttle is provided for the safety and convenience of late-night working. This service has especially aided female staff working late hours.

- All late-night staff receive an additional night allowance. The allowance compensates for meals and other out-of-pocket expenses incurred for late working. These measures prioritize a safe and supportive work environment for all employees.

- We're confident in our services and value your partnership. Please share your positive experience with others. For every referral that signs up, we'll offer you a $500 discount on your next invoice.

- Floater medical coverage increased from 300K to 400K. Coverage extended to employees, their spouses, and up to two children. Policy now covers parents or parents-in-law if you have completed 1 year with MYCPE ONE. Also, Pre-existing medical conditions are now included. Maternity costs are covered up to 40K.

- Company-funded preventive health check-ups are provided twice a year.

# Other Policies

- Employees benefit from a 2 million life insurance policy. An additional 2 million coverage for accidental incidents.

- One of the primary reasons for attrition is "work fatigue" resulting from repetitive or monotonous work. To mitigate this, we introduced a Client Rotation Policy where staff can change clients internally, helping us retain quality talent. However, staff must comply with certain conditions, including completing 24 months with the firm, proper hand-holding for at least 2 months, having cross-trained staff ready to work, and completing client process documentation approved by the manager.

# Other Policies

**Special Medical Leave:**

The company has a policy for medical emergencies that covers staff accidents or ailments, as well as hospitalization. If a staff member cannot work due to such situations, they are entitled to three months of paid leave or the actual time required to recover, whichever is lesser. In case of a medical emergency in the family, the staff member is entitled to special medical leave. Under this leave, they can take up to two months off, which may be approved as leave without pay. This policy has been implemented to support staff members during difficult times and ensure they have the necessary time to recover without worrying about their job.

**Special policies for pregnant staff:**

We understand the unique challenges that expectant mothers face in the workplace. That's why we have implemented a special policy to support them.

- **Paid Time Off:** We provide 13 weeks of paid time off for expecting mothers to care for themselves and their newborns.
- **Rest Time:** We also offer an additional 13 weeks of rest time (leave without pay) for expecting mothers.
- **Work from Home:** Juggling work and parenthood can be challenging for expecting mothers.
  Therefore, we also provide the option to WFH for one and a half years.

# Other Policies

**Culture Over Competence:**

As our team grows, managing employee issues becomes more challenging. We raise awareness to prevent similar problems from happening again and coach staff as needed. However, in some cases, we are compelled to terminate an employee immediately, even if the client is highly reliant on them. Culture always takes precedence over competence, and we prioritize it above all else. We face several issues, such as excessive and unplanned leaves, policy violations, solicitation via social media, demanding frequent and exceptional pay hikes, and negative conduct that influences colleagues. Although these issues are not widespread, we proactively address them, which clients may sometimes dislike.

**Cross Review/Cross Training :**

Cross Review involves two staff members reviewing each other's work, while Cross Training ensures both are familiar with each other's tasks, roles, and reporting. In response to post-pandemic industry attrition, we introduced a no-extra-cost cross review and cross-training policy for several clients, yielding positive results. It enhanced work quality by reducing gaps. In instances of attrition, it ensured ready backup staff for swift replacements, facilitating smoother transitions. Overall, this strengthened workforce resilience and improved quality, simplifying the handling of exceptional situations.

# Other Policies

## Cross Review/Cross Training :

- Immediate backup
- Easy onboarding
- Smooth transition
- Less time Investment
- Build extra capacity
- Increases workforce sustainability
- Easy to manage an exceptional situation

# THANK YOU!

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