

HR

DOCUMENT MANAGEMENT

GUIDE TO PAPERLESS HR

How electronic filing improves
efficiency in Human Resources



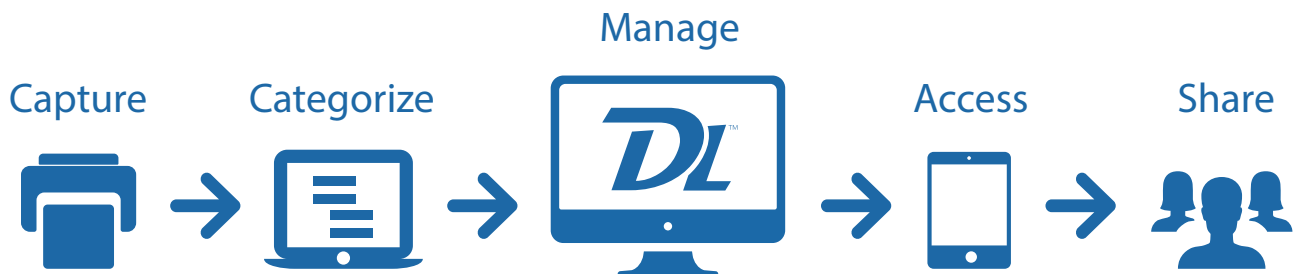
Document
Management
Software



HR DOCUMENT MANAGEMENT

PAPERLESS SOFTWARE

HR document management software converts paper to digital, and together with all your other electronic files, securely stores and manages records. It replaces the need for filing cabinets and shared drives, and simplifies filing, finding, and archiving information.



Top Reasons for HR Document Management

- Move personnel files from paper to electronic
- Ability to search makes it easy during audits
- Avoid losing or misplacing files
- Streamline onboarding
- Improve tracking of policies & procedures
- Improve tracking of employee reviews
- Control who has access to files
- Set retention periods
- Use eForms instead of paper forms
- Connect files with data in HRIS/HCM systems

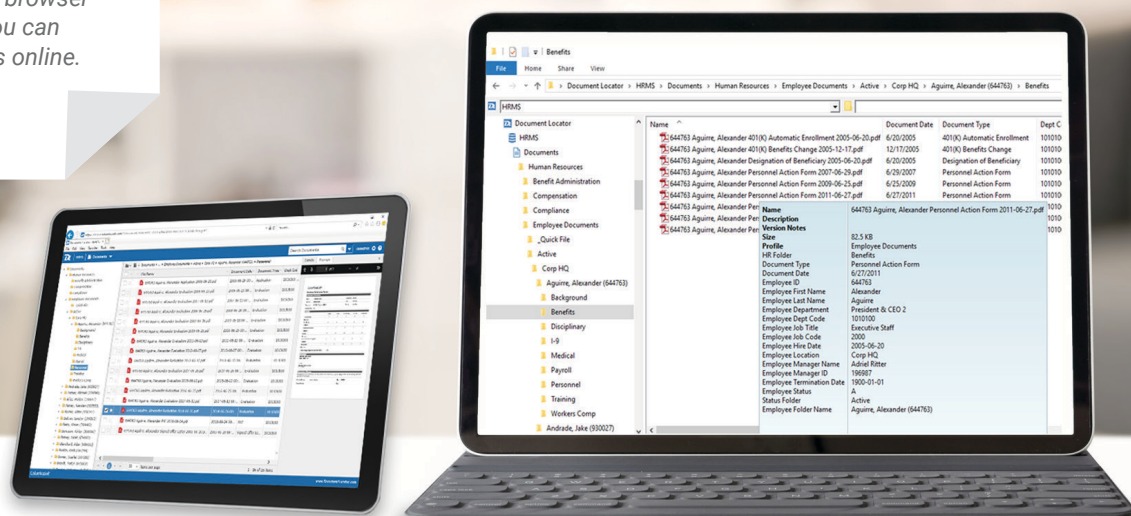
Secure and Centralized

With all your current and former employee files centralized in an HR file management system, everything is in a single, secure location where files are easy to find. Quick and easy access to information leads to faster decision-making.

Once files are digitized and centralized, you have the option to sync data across systems. As data changes in one system, the changes can be applied to files automatically without the need to refile or reorganize records manually.

Familiar and easy

Windows integration makes HR document management familiar and easy to use. Web browser access means you can also get your files online.



WINDOWS INTEGRATION PLUS WEB ACCESS

Document Locator's Windows file and folder workspace allows users to remain in a familiar and comfortable environment. Navigation is built right into Microsoft Windows Explorer and the Windows Desktop. It's as easy-to-use as Windows, and looks just like a shared drive.

Security controls who has access to the system, while sophisticated file management functions are available with a simple right-click.

A secure web browser companion makes it easy to access your files online on any computer, tablet, or smartphone.

FILE MANAGEMENT SOLUTIONS

Streamline productivity in the Human Resources Department.

HR File Management

Files are automatically named and filed in their correct location with security applied. Everything is managed with consistency, eliminating the risk of lost or misplaced records.

Polices and Procedures

Prepare, distribute, and track acknowledgment of important policies and procedures. From employee handbooks, to work instructions, to corporate policies, staff are kept informed of the most current information.

Employee Onboarding

Electronic forms replace paper to streamline the onboarding process and other form-based procedures in HR. Workflow automates alerts and notifications so necessary actions are taken. You have complete visibility into processes.

SEE HOW IT WORKS

Demo and videos available at:

www.DocumentLocator.com/HR



“...I highly recommend ColumbiaSoft’s professional team and their approach to ensure a smooth implementation.”

James Lodenquai
Human Resources Director,
Vallarta Supermarkets

3 ways electronic filing improves efficiency

Significant resources are spent printing, filing, storing, and retrieving paper documents in HR. Every aspect of paper filing adversely impacts the efficiency of the HR department. Here are some ways electronic filing improves the situation:



Auditing and compliance

Auditing is made more efficient with the ability to quickly retrieve files and verify processes. Records are searchable based on content and metadata, and files are easily organized and made available for review.



Record-keeping

Security and privacy requirements for information that falls under regulatory control, such as worker's compensation, unemployment, I-9's, FMLA, OFLA, and more are all managed according to standards for privacy and retention.



Process consistency and automation

Automation of processes eliminates errors, interruptions, and duplications. Business steps, in everything from onboarding, to offboarding, and status changes are defined and repeatable, and the process flow is streamlined.



1-2 months
to implement



6-12 months
average ROI



100%
paperless

A COST-EFFECTIVE OPTION

HR document management is considered a cost-effective alternative that can be used stand-alone, or connected to HRIS/HCM or payroll systems. It unifies file management, and synchronizes with employee data between systems.

While HRIS or HCM systems are usually purchased on a per-employee basis and can be costly, HR document management typically costs a fraction of a full HRIS system, and is also less costly than add-ons to those systems. It offers tremendous flexibility and can be purchased for teams of all sizes and used only in the HR office, or company-wide.

KEEP YOUR HR FILES IN ORDER

I-9 files

I-9 employment eligibility verification forms belong in a separate file of their own. Set retention policies separate from other types of records and have the flexibility to pull the I-9, with other records, for a specific employee via search.

Medical files

Keep employee medical records confidential and separate from personnel files. Allow only staff with appropriate credentials to access this portion of the employee records.

Personnel files

Personnel files are related to the employee's hiring and employment, in addition to items that may have impact on future employment. For example, performance reviews and corrective action records may need reminders for follow up that you can set automatically.

Payroll records files

Payroll-related documents like W-4's or files containing SSN or other protected information may be stored automatically via links with the HRIS or payroll system.

Injury files

Files related to injuries while on the job, like workers' compensation claim records and injury reports, and any additional medical records are secured with profiles appropriate for these specific file types.

Manage employee files, automate workforce procedures, and take advantage of eForms with HR document management solutions using Document Locator.



Searching

Instantly search and retrieve files, use custom searches, and save searches to find files later.



Scanning

Convert paper files to digital and they become fully-text searchable in the system.



Auto-filing

Automate naming and folder structures for consistency and easy organization.



Security

Security controls who has access to files, and activity is recorded in detailed audit logs.



Retention

Records policies maintain retention requirements. Alerts notify when action is needed.



Metadata

Files are categorized with descriptive facts to improve organization and findability.



Workflow

Workflow improves process efficiency, with automated routing & electronic approvals.



Reporting

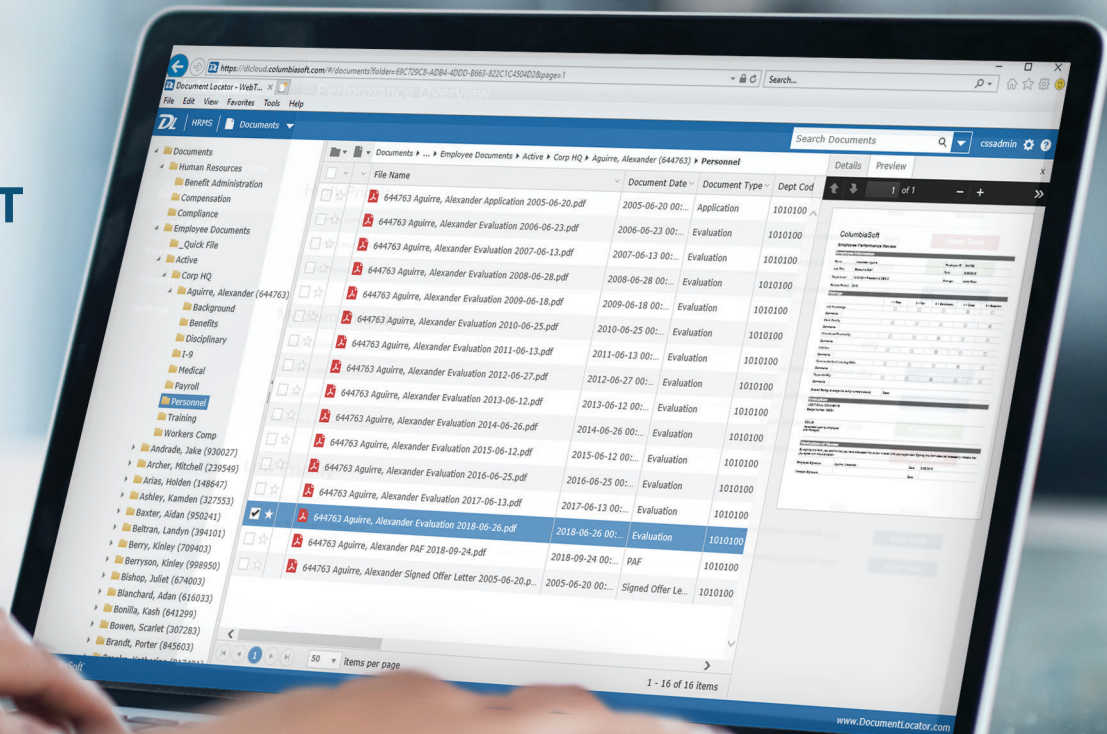
Validate compliance and improve accountability with built-in reporting.



Electronic Forms

eForms streamline form-based processes like onboarding, while eliminating errors.

HR DOCUMENT MANAGEMENT



ColumbiaSoft™

PHONE

800.298.1172

ADDRESS

15495 S.W. SEQUOIA
PARKWAY,
SUITE 190
PORTLAND, OR
97224

EMAIL

INQUIRIES@COLUMBIASOFT.COM

ColumbiaSoft is a leading document management solutions company. Since 1998, we've been helping businesses and organizations improve efficiency and reduce risk. Our solutions are fully integrated with Microsoft and other leading software technologies, making it easy for people to use.