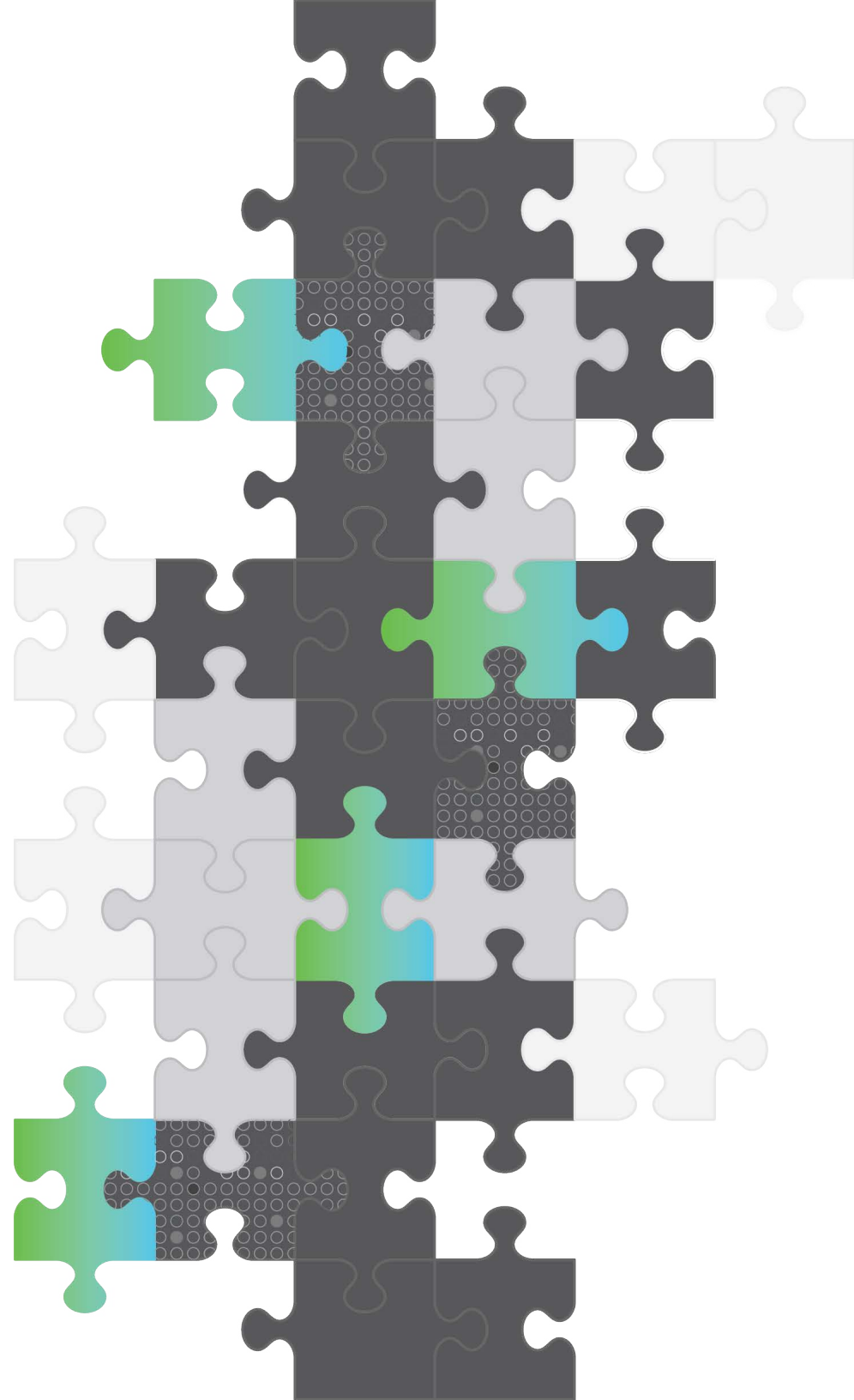


HUMAN RESOURCES | ARTICLE

DIGITAL EMPLOYEE RECORDS MANAGEMENT: **THE DEFINITIVE BREAKDOWN**

Hyland™



Human Resources departments look different than they did just a few years ago. The shift to remote workforces has permanently changed hiring, onboarding, training, benefits management, offboarding and everything in between. The entire employee lifecycle has moved online, making in-person processes unrealistic.

Fortunately, change also creates opportunities for growth. Now is the time for HR departments to take advantage of these seismic shifts. With the right tools in place, HR departments working remotely can become even more connected to their global employee populations. And, let's face it, paper employee records have always been problematic.

First, there are the risks. Whether prepping for an upcoming audit or conducting an investigation into an employee issue, there are security-, compliance- and cost-related threats everywhere — especially when processes are manual, paper-based and inconsistent. When mishandled, workplace misconduct and data privacy regulations can impose major fines, making a good content services platform a necessity.

But it's not just about avoiding penalties and playing catch-up. This is an opportunity for HR departments to be on the leading edge of employee relations, records management and much more. The right content services solution combines intelligent automation, case management and an unrelenting focus on the security of sensitive documentation, so your HR team can focus on what matters most — people.

WHY CONTENT SERVICES FOR HR?

A human resources information system (HRIS) and a content services platform are two distinct but complementary systems. Adding content services extends the value of your HRIS by supporting employee data with a powerful combination of document management and process automation. While an HRIS serves as a system of record, storing employee data and sometimes managing the surrounding processes, a content services platform:

- Manages all the unstructured content for employees (e.g., resumes, tax forms, employment contracts, offer letters, etc.)
- Automates processes like employee onboarding and offboarding, file retention and records management, policies and procedures administration, employee status changes and more

With content services, every HR function in your organization can be carried out remotely, securely and accurately, even in a continually changing workplace environment. And, with more organizations realizing the consistent security and cost savings of managing information off-premise, **content services in the cloud** introduces even more opportunity for digital transformation in HR.

WHERE ARE YOUR EMPLOYEE FILES?

If you're still going through the digital transformation process — which most organizations are — the answer to this question is: everywhere.

A content services solution not only digitizes all critical content — paper, electronic forms and data — from any location, but also consolidates documents and data on a single platform to give HR departments one system to navigate. This is a necessity for HR departments — and workforces — that are now operating remotely.

Ideally, the system will also:

Mimic your existing HR folder structure. Turning a paper file into an electronic file that looks exactly the same makes using the new solution structure more comfortable for HR employees. A good solution is also capable of keeping employee documents separate from the employee file for compliance purposes.

Ensure that documents are secure and automatically categorized auto-folded.

A good solution will not only make employee documents easy to view in one system, but will also make it easy to pull in documents from other systems. It will also allow you to easily add files on an ad-hoc basis.

Help you identify missing documents. In a paper-based world, HR workers can see the documents that are in the folder, but they can't see if there are documents missing. A content services system gives users visibility into what documents are missing for an individual or group of employees.

Streamline document acknowledgement. With a remote workforce, it has become nearly impossible to efficiently and effectively create, distribute and track employee acknowledgement of policies and procedures in any sort of timely fashion. Content services solutions simplify every step of this process, while reducing or eliminating associated administrative tasks such as filing, copying and mailing physical documents.

HOW DO YOU ACCESS EMPLOYEE INFORMATION?

Do your remote HR staff have to go to a physical workspace to access paper employee files? If so, do they often encounter misfiled, incomplete or missing documents?

A good content services platform provides HR departments with visibility into the full history of every touch, view and edit to employee files. It also provides a way to secure them — usually with role-based access. Any good content services platform should provide encryption when data is at rest (not actively being used), in transit (moving between servers within the database), and in use (being accessed by authorized users).

A key component of HR content solutions is making critical HR content available to the people who need it, wherever they are — even when disaster strikes. Content services is the first and last line of defense against catastrophic events, securely storing information during its entire lifecycle with built-in data redundancy.

Content services essentially removes the burden of records management from HR staff, saving time and minimizing the organization's compliance risk. When a document enters the system, it is automatically identified and assigned a record type, and the appropriate retention policies are applied. Documents are redacted, retained and removed at the right time to ensure compliance with federal, state and organizational policies, and the organization's specific legal retention requirements.

HOW MANY SYSTEMS DOES HR STAFF USE?

Even if documents are digital, without a centralized content services platform, HR staff must log in to a separate system, spreadsheet or source to retrieve data they use in and around the human capital management (HCM), HRIS or other supporting niche solutions. The complex time and event-based retention policies that HR departments must maintain for different employee files require a better-than-average solution to manage.

Taking HR operations to the next level requires one very important piece of functionality: integrating content seamlessly with core applications — like ERPs, HRIS, HCM and other HR systems — without requiring custom code.

Intelligently linking HR files and processes to the corresponding employee data in other applications gives HR staff all the information available for each employee, on one screen.

For example:

- A company has an applicant tracking system that manages prospect applications, interviews and hiring. When a new hire is made, the documents from the applicant tracking system need to become a part of the employee file.
- Data in a company's HRIS system changes when an employee who was active is terminated or resigns. The employee file in all other systems needs to be updated with that information to ensure consistency.

A good content services platform will seamlessly manage the transfer of information that takes place in both of these cases.

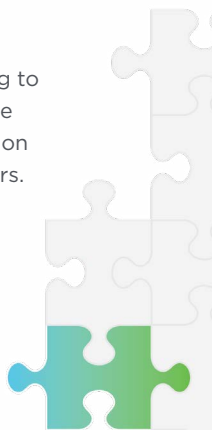
WHAT DO YOUR HR PROCESSES LOOK LIKE?

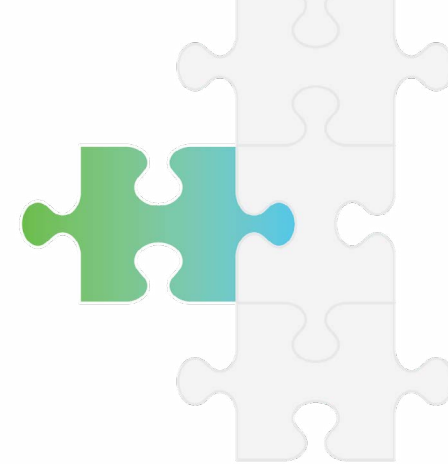
HR performs a lot of complex processes that most HR technologies are not built to handle. These are the gaps that keep file cabinets in business and HR staff buried in non-strategic tasks. Bridging these gaps with a content services solution helps disparate HR systems communicate and builds true end-to-end automation for HR processes.

With today's intelligent automation capabilities, HR staff are free to do the valuable work of managing the “human” component of HR, while the content services solution is in the background handling compliance requirements, classifying and updating employee records and keeping processes moving by automating repetitive tasks and decisions.

Processes like employee onboarding and offboarding, harassment claims or investigating safety incidents involve multiple stakeholders who need to take specific actions and contribute information, which may also need to be tracked for reporting or compliance purposes. With a case management approach, it's possible to store and track all the information and activity surrounding these kinds of HR processes on one screen. Nothing gets lost, and stakeholders have one source of truth. HR is better able to maintain consistent processes for handling employee complaints, grievances, safety violations or misconduct, and has a holistic view of all tasks, conversations, notes and documentation surrounding an employee issue.

The entire employee lifecycle exists together, from application and onboarding to acknowledgements and offboarding. HR can more easily identify and eliminate bottlenecks and prepare for audits with immediate insight into what information they have and what information they need — without involving IT administrators.





WHAT DOES HR NEED TO SUCCEED?

If your HR department could benefit from reducing paper, automating records retention, integrating systems and reducing administrative burden, it's time to consider a digital transformation strategy that includes content services. Review the capabilities below with your HR staff, and consider what a content services solution could do for the critical HR processes — and people — that keep your organization running.

Employee File Management

- Digitize employee files
- Automate folder creation
- Role-based security
- Quickly identify missing documents
- Mobile/email access to processes and documents

Records management

- Mitigate risk and maintain compliance
- Automate record retention
- Time- or event-based retention
- Ability to place holds on records

Policies and procedures

- Create, approve and distribute policies and procedures
- Report on acknowledgements
- Quickly identify delinquent users and send reminders

Recruiting and selection

- Manage the interview and hiring process
- Track applicant resumes and recommendations
- Create offer letters and route for approval

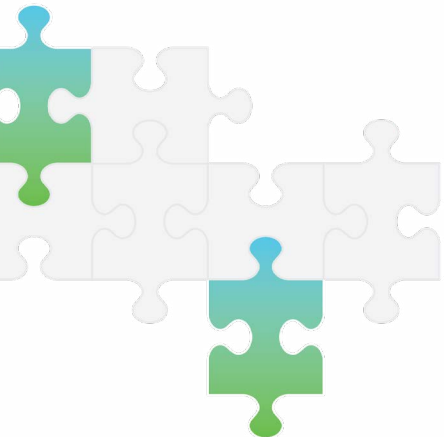
Onboarding and offboarding

- Remote access to new hire paperwork
- Manage multi-department checklists
- Add/remove access to sensitive information

Employee relations

- Manage grievances, incidents, performance improvement plans and employee leave
- Report on resolution, time to close and related cases
- Collect supporting notes/documentation

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