

Digitize the process

How to use document management to streamline onboarding for HR

INTERVIEWED BY JAYNE GEST

When companies hire new employees, it usually involves a lot of paperwork and checklists — from filling out and filing stacks of forms to completing logistics, such as ID badge, laptop and phone assignments. What's more, many companies are still hand keying much of this information into different systems, which introduces the potential for errors.

“By digitizing this process, human resources can put more of the onus on the employee and electronically track all pieces to make sure everything is completed,” says Nano Zegarra, chief technology officer at Blue Technologies.

Smart Business spoke with Zegarra about how document management can help HR be more efficient and reduce errors, even while handling higher volumes.

Are onboarding challenges bigger for heavily-regulated industries?

Onboarding can be a pain point in almost any organization. If an industry is regulated, like a trucking company, school or health provider, a lot of paperwork is required. But even in less-regulated organizations, like car dealerships, certain paperwork needs to be in place before new hires hit the floor to sell.

Employers might say, ‘Let’s just get new employees going and we’ll bother them later for that,’ but then six months later, it’s been forgotten. Or, someone can forget to mark a checkbox, verify a critical licensure or they may enter a piece of information incorrectly.

When people are your most important asset, document management solutions are beneficial in eliminating errors or oversights. And if you have high turnover or are growing and cannot get people hired fast enough, any technology to digitize and streamline your company’s onboarding process is a huge help.

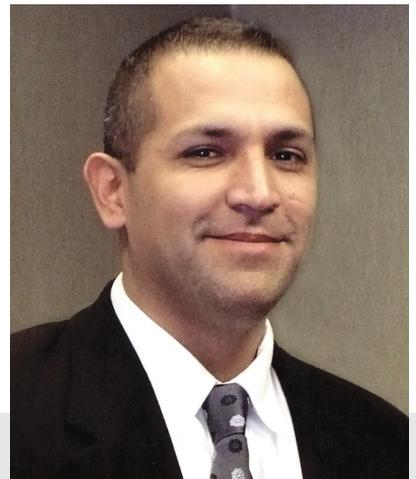
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How do document management solutions help?

Companies should rely on electronic forms for ease and accuracy within their onboarding process. Fortunately, an HR department typically has the overall process down pat, which makes technology integration easy to implement. Your technology adviser can work with them to customize a digital solution unique to your organization’s process needs.

HR understands which documents are the biggest pains for your organization, where they have the most errors and where they typically have to do the most follow-up to determine ‘did you mean this or that?’ By digitally creating packets of information with document management, HR isn’t hand keying data on multiple forms. A self-serve solution can even enable new hires to fill out forms from home, then track everything — making it easy for HR to see what’s missing and send reminders as needed.

Your document management solution can also be linked into other systems like payroll, easily passing information from one area to another. For example, when an electronic HR form is filled out, it can generate a PDF that’s uploaded into one of these portals.

Once employee information is electronically created and stored, it’s then far easier to retrieve it and follow your normal retention plan, ensuring you can easily find it

as needed, such as in the case of an audit, or get rid of it once it’s past the retention date.

Is this new technology?

Document management solutions for HR used to be canned, with little control. You’d select the electronic form type and use it for onboarding, applications or post-hire management. But now, everything is customizable — enabling companies to create their own document and self-serve portal very affordably.

You can do training videos and even push policies and procedures out to people who work from home, with the self-serve portal allowing employees and/or managers to access certain information and make changes remotely. The technology can comprehensively handle everything in a single solution.

And these newer solutions aren’t just for HR. They can store and manage documents from cradle to grave — from when the employee first applies for a job, through when their documents can be destroyed post-employment, tracking any performance reviews or disciplinary items in between.

While your company might not need all these features from the start, the technology is scalable. So, you can start with onboarding, and slowly move into doing full employee file management without having to link into another program. ●