Paperless HR Guide

Ready to ditch the pen and paper?

Managing your employee files on paper is a serious challenge. It's all too easy to misplace an important document and seemingly quick tasks like retrieving a file can wind up taking much longer than they should. With the right tools and a practical strategy, switching to a paperless system can be an easy transition for HR. This guide is intended to introduce you to some of the key ways Human Resource departments can benefit from moving to digital and to get you started on the path to a paperless office.

TOP PAPERLESS BENEFITS

✓ **Save Time:** Filing, retrieving and distributing documents takes a fraction of the time.

✓ **Cut Costs:** Reduce cost of labor, paper, folders, filing cabinets, copier toner, maintenance and more.

✓ **Streamline HR:** Online workflows reduce redundant tasks and make collaboration easy from anywhere.

✓ **Audit Protection:** Automatically track required and time-sensitive documents in employee folders.

✓ **Reclaim Office Space:** No need for bulky, disorganized filing cabinets or legal boxes.

MAKING SURE IT'S A GOOD FIT

Going paperless can provide you and your HR team with a number of exciting benefits, but every office is unique. Is going paperless a good solution for you? It can be helpful to think about specific **problems** you are trying to solve and your overall **goals** for the department when deciding if going paperless is a good fit for your office.

Businesses That Can Benefit

Taking HR paperless provides the most value to companies that have:

- Paper filing system or network file share
- High turnover or rapid expansion
- Multiple office locations or remote staff
- Frequent audits on employee files
- Annual acknowledgements or contracts

Paperless HR Goals

These are some of the top goals companies look to accomplish by going paperless in HR:

- Better organization
- Reduced task redundancy
- Quick, easy file retrieval
- Audit preparation
- Enhanced security

DID YOU KNOW?
An average 1,000 employee company **spends over $100,000 / year** searching for and recreating lost files.

BUILDING YOUR PAPERLESS STRATEGY

Once the decision has been made to go paperless in HR, getting started can seem daunting. Keep it simple. Continue to focus on your **goals** and specific **problems** you're trying to solve with a paperless solution. It's important to start to piece together a **high-level plan** for your paperless project. Here are some important questions to consider.

Should we convert all of our existing paper files?

Some factors to consider: Frequency of access, office space, staff availability, budget.

It's important to scope your conversion project. Will you complete it in-house with available staff or hire a third-party scanning company? Will you be converting all of your existing paper files? Only active employee files? Or will you simply start with new hires, skipping your existing paper files?

Who should have access to employee information?

Some factors to consider: Staff security roles, file folder sections.

Think about the different staff members that require access to employee information and what kinds of documents they are allowed to see. Does Payroll need access to the Payroll folder? Do Managers need access to specific sections of their own staff's files?

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Will our paper workflows translate to electronic?

Some factors to consider: Staff technology level, staff locations, turnover rate, growth rate.

Ensuring your businesses processes run smoothly in the digital world is crucial. Is electronic onboarding an option for your team or is it easier to have forms filled out on paper and scanned? Does it make sense to utilize online workflows or keep some processes running the old-fashioned way? Is there a compromise between the two?

DID YOU KNOW?
Only 9% of managers are happy with their organization's current onboarding process.

CHOOSING THE PERFECT PAPERLESS HR SOLUTION

Now that you've explored the value of going paperless and created a high-level strategy, it's time to consider your options for a paperless HR solution. There are quite a few different **categories of HR software** that can help your department get closer to your paperless dream. It's important to know what each category is useful for so you can choose a solution that will enable you to meet your **goals**.

Payroll

A payroll system is often the first paperless HR software a company will utilize. It helps HR get your staff paid correctly, on time, every pay cycle.

Document Management

Document management software takes the place of your physical filing cabinets and allows your team to store and manage all of your employee files electronically. A good document management system is a key component to taking HR paperless.

Onboarding

An onboarding solution enables new-hires to review, fill out and sign all of their onboarding paperwork completely electronically. Once you've taken your employee files digital, electronic onboarding helps you stay paperless from the minute a new-hire joins the team.

Applicant Tracking System (ATS)

An ATS helps HR keep track of applicants and pick top talent. These systems are typically used for storing applicant information and scoring hopeful hires.

Human Resources Information System (HRIS)

HRIS software is typically used to record data about active employees. Storing contact information, performance evaluations and time & attendance tracking are a few common uses for an HRIS.

DID YOU KNOW?
The Office for Civil Rights (OCR) has collected **over $22 million** from HIPAA violations.

GOING PAPERLESS WITH DYNAFILE

DynaFile is a paperless HR solution that has been helping companies achieve a higher level of efficiency for **over 15 years**. Our unique scan-to-cloud document management solution helps your team take the entire department paperless fast. From there, online forms, esignatures and automated workflows replace pen-and-paper processes so you can stay paperless. Here are just a few ways DynaFile can help **streamline HR**.

Scanning Automation

DynaFile comes complete with scan-to-cloud tools that help automate your back-file conversion and manage any miscellaneous paperwork coming into the department.

Instant Document Retrieval

Pull up documents based upon the employee's name, folder section, type of document, expiration date or any other custom identifiers. Cloud access makes your files available from anywhere at any time.

Advanced Security

DynaFile's security features allow you to get as detailed as you like when designing access permissions. Allow Payroll staff to *only* access Payroll folders or Managers to *only* access specific sections of *just* their own employees' folders.

Electronic Onboarding

Allow new-hires to review, fill out and sign all onboarding paperwork online. You can use the same method for other forms, too, and design automated workflows for your different processes. Completed forms are automatically filed in the employee's folder back in DynaFile.

Audit Reports

DynaFile's custom audit reports keep your employee folders up-to-date with all required information. Have your reports automatically emailed to your team each week to see which employee folders are missing required documents and which have a policy or credential coming up for renewal.

READY TO GO PAPERLESS?
Contact us today to get started!
(888) 510-3453
Sales@DynaFile.com
www.DynaFile.com