



LEADING SERVICE PROVIDER TO THE DEAF AND HARD OF HEARING

HR Processing Solution

This organization was in need of a secure method for efficiently handling and processing personnel files from their more than 100 locations across North America.

CHALLENGE

As a leading service provider for the deaf and hard-of-hearing community, this organization was spending over \$200,000 per year in courier costs to forward documents from call centers to their headquarters. They were finding themselves running out of physical space for document storage, and had recently spent a great deal of money to reinforce the floor under their file room containing approximately 5 million pages.

Center Managers of the organizations 8 call centers nationwide are constantly hiring. Their Human Resource Department manages the personnel and benefits needs of its 8,000 employees. The need for an HR process solution to help streamline their business practices led the organization to seek DoxTek's help. Efforts to minimize the necessity for paper file storage and the cost of courier fees were necessary while also providing the ability to integrate any scanning and retrieval systems with their existing HR software.

DOXTEK SOLUTIONS

The solution needed to not only be efficient, but also compliant with industry, state, and federal requirements. DoxTek provided such a solution using a capture solution and Hyland OnBase software.

The project distinguished "New Hire" paperwork from normal ongoing paperwork such as disciplinary actions and benefits administration. The organization decided the system and process needed to be easy for the center managers to use and determined to use the existing multi-function peripherals (MFPs) at those locations to scan the documents. For example, all completed paperwork for a new hire is scanned to a specified email box set up for this purpose using the MFP.

Challenges

- Rising courier costs to transfer documents to a central location
- Increasing need for physical storage space to house growing number of documents
- Growing concern on how to prevent future costs associated with housing the organizations' 5 million pages

Solutions

- Streamlined business solutions for processing HR documents
- System for New Hires achieved upwards of 90% automation and accuracy prior to human review
- Maintained the organizations high level of document security and personal information storage requirements
- Created an external hosting solution using DoxTek's Cloud

Using DoxTek's Advanced Email Import module, the email box was monitored and emails and attachments were automatically imported into the system. The capture solution was trained to automatically recognize, classify and separate 15 distinct document types including the ability to distinguish subtypes (such as the various state W-4 forms). The software solution identified the name of the new hire and automatically indexed it. No barcodes or separator sheets were used. The capture solution then sends the documents to an OnBase workflow for the necessary reviews and checks. HR Specialists receive New Hire packets in an inbox where the documents then flow through necessary queues where the system can verify I-9 documents, ensure all documents have been properly completed and signed, and other business rules. OnBase tracks all documents and maintains a complete audit history. The system for New Hires is achieving upwards of 90% automation and accuracy prior to human review.

A separate process was created for incoming HR documents. The capture solution automatically recognizes over 150 distinct document types as well as identifying the employee each document is associated with. The documents are presented to a specific user(s) for review and correction as needed. Because of the diversity of document types, this complex system is challenging, but is accurate approximately 80% of the time. Following this "validation" step, documents are exported to OnBase. OnBase workflow routes the documents to the necessary HR Specialist for action depending on the document type.

Integration with their HRIS system was also important to this organization. Integration was achieved in multiple ways;

1. Employee data is securely accessed and shared with the capture solution and OnBase to improve accuracy in identifying the employee.
2. Additional index information (metadata or search keywords) is automatically populated based on the Employee ID - making documents searchable by employee name, date of birth, work location, etc. without the need for manual indexing.
3. Using a codeless integration tool, the HRIS system was linked to OnBase so that employee documents can be instantly retrieved based on the employee record they are viewing in HRIS.

This leading service provider to the deaf and hard-of-hearing community has chosen to have all components securely hosted externally to minimize overhead and administrative costs by their IT department. The system went live in January 2015, and the organization is currently planning additional functionality which could include digitizing their file room (backfile), providing access to Managers outside the HR Department and even adding additional workflows for employee changes such as transfers, promotions, terminations, etc.

