



The New HR Tech Stack

Why Document Management
Is in the Spotlight

Spoiler Alert: Your HCM wasn't built to handle documents

HCM software is great at payroll, benefits administration, onboarding and maintaining employee data. Sure, the software may hold documents as attachments, but the reality is this is an incomplete solution that wastes resources and opens your organization to compliance and data-security risks.

Let us explain. When you rely on your HCM for document management ...

- Documents are most likely maintained in multiple systems and locations, and in multiple forms, both paper and electronic.
- There is no easy way to know if documents are complete and up to date.
- Documents are difficult to share securely.
- Gathering documents for an audit or legal discovery is a time-consuming manual process.

You need a document management system.

A document management system centralizes and organizes HR documents

Wherever your HR documents originate, a best-in-class, cloud-based HR document management solution makes them instantly accessible when and where you need them, while storing them safely and securely.

HERE'S HOW IT WORKS



Paper documents can easily be scanned directly into the software.



The software integrates with your HCM system and other HR technology solutions to index and store all employee-related documents in a central repository.



The system uses AI to automatically index documents by meta-data configurable to documents types, employees and other criteria.



It automates repetitive workflows, freeing staff to focus on strategic initiatives.¹

Share documents securely

Many HR organizations share documents by mail, email and even fax because it's easy. But taking the "easy" way leads to significant risk for your organization. A document management system can provide access to authorized users inside and outside your organization that is both straightforward and secure.

YOU CAN



Limit access by role, document type, location, date range and other configurable criteria to protect employee data and comply with regulations.



Share documents with a secure link that expires, rather than attaching documents in an email.



Restrict what recipients can do with the document, such as printing, downloading or emailing.



Maintain a detailed audit trail of every action taken on each document.



Share multiple documents via a secure digital "review room" for authorized viewers.

Know when an employee file is incomplete or a crucial document is out of date

Having incomplete employee files or outdated documents, such as certifications, can expose your organization to compliance risk. An HR document management system leverages sophisticated automation to confirm that records are complete and current.

YOU CAN



Monitor individual document types for expiration across your employee population, or review entire employee files for completeness.



Send automatic alerts to employees to supply missing documents without HR intervention.



Provide preemptive warnings that a document, such as a license or certification, is approaching its renewal date.



Remain compliant with complete and up-to-date employee files without taking time away from higher-value tasks.

Enforce a compliant and defensible retention policy

Regulations and best practices dictate retention periods for different document types and within different jurisdictions. Improper destruction (too soon, too late or inconsistent) increases risk not only for regulatory compliance, but legal discovery as well.

A DOCUMENT MANAGEMENT SYSTEM ALLOWS YOU TO

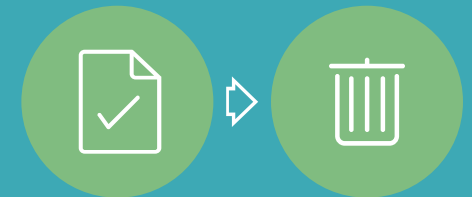


- Establish and enforce document-, employee- and jurisdiction-based retention policies.



- Limit liability from documents retained beyond term.

- Mark expired documents for proper destruction and set them to be deleted automatically.



- Make it easy to comply with General Data Protection Regulation (GDPR) and consumer privacy act requirements of some states, such as the “right to be forgotten.”

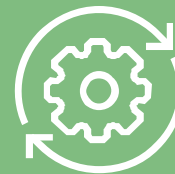
Respond quickly to audit and discovery requests

Audits and legal discovery can wreak havoc on your HR organization, taking time and manpower away from more strategic tasks that impact the future of the business. An HR document management system can drastically reduce the time and effort required to comply with these requests.

YOU CAN



→ Pull specific document types across any employee population.



→ Get back to business without major disruption.



→ Share securely online with internal or external business partners.



→ Reduce expenses and reliance on contingency workers for audit response.

CartaHR

Command central for fast, secure access to all your employee documents

Transform your HR operations with a document management solution designed for your team: CartaHR. CartaHR gives teams time to focus on the keystone employee projects that drive business success.

Choose CartaHR to give your team:

- Streamlined document management thanks to automation and HCM integration.
- A single secure and compliant repository for all HR documents.
- Control over access to documents inside the organization and beyond its walls.
- More time to focus on strategic initiatives that help the business grow.

➤ To learn how CartaHR can complement your HCM system and the rest of your HR tech stack, visit accesscorp.com/carta-hr.

¹ Brian Sommer, "The SaaS memo most ERP vendors missed," Diginomica, December 17, 2018.

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