

5 Powerful Resolutions to Simplify Employee Recordkeeping in 2018

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2018 Recordkeeping Resolutions

Welcome! Before we get started...

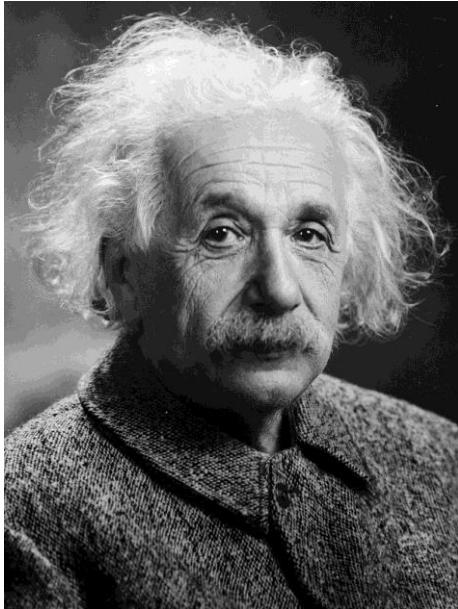
- Use the chat box on the left to ask questions
- Audio for today's webinar will come through your computer speakers. Please be sure your speakers are turned on and you have the volume turned up.
- If you are signed on more than once, please locate the duplicate log-on and close it. This will create a better audio experience.
- All attendees will receive a link to the presentation and slides in a follow up email.

Today's Agenda

You'll receive real-world pointers on how to:

- Simplify your recordkeeping routine without breaking any laws
- Stay on top of purging records you don't need (and when it's safe to do so)
- Evaluate different recordkeeping approaches to determine which one works best for you

Einstein Once Said..



“If a cluttered desk is a sign of a cluttered mind, of what, then, is an empty desk a sign?”

Resolution #1

Purging Old Records



Hiring Forms

- Job Postings and Advertisements – 1 year
- Resumes – 1 year
- Drug Test Results – 1 year
- Employment Contracts – 3 years
- Job Applications (*including seasonal and temporary workers*) – 1 year

I-9 Forms

- 3 years from date of hire or 1 year after employment ends
 - whichever is later
- Let's look at an example:
 - Fred is hired on 11/11/14
 - Fred is fired on 11/11/17
 - 11/11/14 + 3 years is 11/11/17
 - 11/11/17 + 1 year is 11/11/18

In this example, the Form I-9 would need to be kept on file until November 11, 2018.

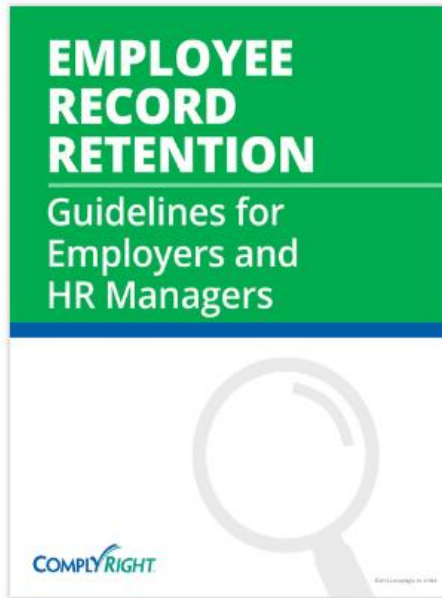
Financial Records

- W-4 Forms – 4 years
- W-9 Forms – 4 years
- Payroll Records – 4 years
- Receipts for Business Expenses – 3 years

Personnel Records

- Performance Evaluations – 2 years
- Termination or Layoff – 1 year
- Promotion or Demotion – 1 year
- Transfer or Training – 1 year
- Benefit Records – 1 year after termination
- FMLA Documents – 3 years after leave ends

Tip Sheet Available



Go to ComplyRight.com

1. Click on Resources
2. Click on Knowledge Center
3. Scroll Down to Tip Sheets

Resolution #2

Ditch It Correctly



Destroying Employee Records

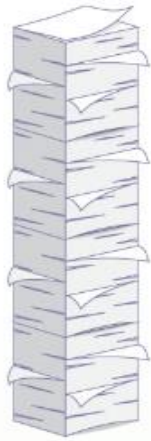
- Use locked recycling bins and hire shredding service
- Shred yourself using a paper shredder
- Electronic files can be deleted by using overwriting software

Resolution #3

Go Digital



Let's look at the
real weight of paper.



**20,000
pages**

=



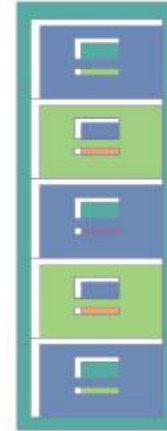
**1,000
files**

=



**10 Bankers
Boxes**

=



**1 filing
cabinet**



Pitfalls with Paper Recordkeeping

Paper systems can:

- Be time-consuming (printing, collating, filing, etc.)
- Have inconsistent processes & workflows...
- ...Which can lead to compliance issues
- Be costly (forms & folders, filing cabinets, office space)
- Be susceptible to disasters (e.g., floods, fires)

Thriving in the Digital Economy, an IDC InfoBrief



Small Businesses that have embraced digital technology show faster growth than companies that have not.

Positives Outweigh the Negatives

Going digital can help you with:

- Reduce administrative time
- Streamline & standardize processes
- Reduce compliance risk
- Reduce overhead expense
- Protect data against disasters

The Case for the Cloud

- Instant access from anywhere
- Employees lend a hand
- No need for IT
- Accident proof your data
- Keep confidential information secure

Resolution #4

Choose the Right Partner



Get What You Need

- Installation-free software (cloud-based systems only require a login/password)
- Software updated automatically and instantaneously by the software provider (all cloud-based systems should offer this feature)
- Simple and easy-to-use interface (layout) for managers/employees with self-explanatory dashboards
- Essential functionality... without unnecessary complexity

Finding the Perfect Partner

- Is the company financially stable?
- Have they been around more than a few years?
- Will this vendor be easy to do business with?
- Does the software offer multiple layers of security?

Finding the Perfect Partner Cont'd

- Is the software designed specifically for small businesses?
- Does the provider have expertise in labor laws and HR compliance?
- Is the software the *best* solution – both functionally and economically?
- Will this create more time in my day so I can focus on more important matters?

E-Book Available



Go to HRdirectApps.com

1. Click on Learn
2. Click on E-Book

Resolution #5

Stay Organized



Keep It Clean

1. Designate a physical inbox
2. Minimize incoming paper
3. Schedule regular cleaning time
4. When in doubt, throw it out
5. Scan it

HRdirect[®] smart apps



- FREE Employee Records App
- Web-based solution
- Easy-to-use and implement
- Other Apps Available –
 - I-9s & W-4s App
 - Attendance Calendars App
 - Job Applications App
 - Progressive Discipline App
 - Coming Soon – Time Off Requests App
- Affordable for small businesses

For more info visit:

www.hrdirectapps.com/hr-recordkeeping-revolution

Questions?



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