**Background**

Little Friends is a not-for-profit organization. They provide schooling and housing for kids and adults with autism and other developmental disabilities. They strive to create an environment where they can work, learn, play and enjoy life.

**Problem**

Little Friends is looking into making their Human Resources department paperless. Right now, they have cabinets filled with paper documents for over 400 current and past employees. The main issue with the paper documents is being able to quickly find information on a specific employee when needed. They are currently using Paylocity for employee files, but they only store records for up to 1 year and are not on location. Little Friends needs to be able to store records for up to 5 years and would like to have access to employee files on site.

**Solution**

They would like us to come up with recommendations on how they could make the HR department completely paperless as soon and as efficiently as possible and maintain a paperless environment.

**Step 1 – Current**

In step 1, we are focusing on figuring out the most efficient way for their staff to make digital copies of the current documents they have. Items we need to focus on are:

* Scanning/saving files – How to do this?
* File structure – See diagram “HR File Structure”
  + Personal – personal documents (application, job description, ECF, etc.)
  + Employment – confidential documents (medical records, background checks, FMLA, etc.)
  + Benefits – benefit enrollment forms, COBRA, sick bank, etc.
  + Performance – performance appraisals, 45/90 reviews, performance evaluations, etc.
  + Training – training certificates, training quizzes, DSP training packet, education, licenses/certificates
  + I9 – I9 document only
* Security – who can view these files and when?
* Equipment
  + Research Optical Character Recognition (OCR) technology – This technology will read in the file as a text file rather than an image file, significantly saving on space.
    - Possible OCR systems:
      * Adobe
      * Google Docs
    - Is there a better scanner or software that will work with their current scanner?
      * If there is both, which would be more efficient?

**Scanner overview** - What is needed to perform the job from going paper to paperless is a scanner built with OCR Technology or any scanner with the use of Adobe Acrobat Pro. A big

business scanner costs about $20,000. A good example of this is the Xerox

C60. Any $100 scanner with Adobe Acrobat Pro for $14.99 (monthly) could do

small jobs after most documents have been scanned in with the big Xerox machine.

This job can take many weeks depending on network traffic and the amount of

storage needed, as well as an employee to feed the scanner new documents.

**Step 2 – Proposed**

For step 2, we are going to meet with tech support (Wednesday 10/17/2018) to get a better understanding of their needs and current equipment. This will help us determine what kind of database they could use, if needed, backup system, security, etc. Depending on our findings, this may also help us complete items in step 1.

**Other Possible Step Topics**

* Security – general and email
* Audit trails for accessing/changing files
* Backup system – auto, external, etc.
* Other equipment – monitory, servers, etc.