Enterprise - How to Manage Required Documents

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Should You Use Required Docs?

Do you require that all employees complete a drug test and/or background check before beginning an assignment? Or, do you need to verify that an employee has a certain certification before being placed with a customer? Are any of your requirements dependent upon an expiration date?

If you said yes to any of these questions, you may want to consider utilizing the required docs page to store, track, and manage this information.

Quick Steps

Add Required Document to Employee Record

- 1. Navigate to employee record
- 2. Under Details, select 'required docs'
- 3. Select the pencil icon
- 4. Select Document Category from drop down (optional)
- 5. Select document under available documents column
- 6. Click on the right arrow icon to add it to the employee record
- 7. Select 'Save'

Add Document Information

- 1. Navigate to Employee Record
- 2. Under Details, select 'required docs'
- 3. Select the document you wish to add information to
- 4. Use the Document Information section on the right to add Dates, notes, current status, etc.
- 5. Select 'Save'

Complete and Detailed Steps

How to Add Required Docs:

Begin by navigating to the employee record that needs a document added. Once there expand the details section and select "required docs":



Next, select the pencil icon to open the add required document window:

M	nines 18 50211 SSN: YYY-YY-5552			
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	add required document			
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L	All	*		
es				
	available documents	selected	×L	*
	Document 🔺 Scope	No Records Found		
	ACLS			Described.
	Arbitration Agreement	•		Required
3	ARDMS			
s	ARDMS Verification			
er	Arif Test			eo 📖
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~	ASCP/Certificate			
L	Background Check			
L	Benefit Handbook (Do			
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The document category dropdown allows users to narrow or expand the list of available documents that display based on different categories:

		(? ×
add required document		
Document Category		
All		
Description	selected	×D
All		
Nondisclosure	No Records Found	
Onboarding Document		
Orientation		
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To add a required document, simply select the document (this will highlight it as shown below) and the⇒ icon to move the item into the selected document column:

add required document

Document Category		
All		
available documents	selected	× D
Document 🔺 Scope	Document Scope	*
Credit Check	Drug Screen	
Criminal Background	Background Check	
CXR		
Drivers License		
Drug Screen		
Drug Test		
Enter Document Name		
Fingerprint Test		
Food Certificate		
Forklift Certification		
GMP Form		
Ground Keeper Certific		
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Upon selecting save, the missing documents will be noted with a new employee avatar icon:



Additional Document Settings

To set specific information such as when a required document was received, requested, etc... use the document information section.

Note A selected documents will be noted with the arrow icon.

Utilize the document information section on the right to save all information related to the required doc.

 Show only active documents Show only expired documents Show only rejected documents 	Show only only of Show only of Show only doct	documents th submitted doo uments with a	at expire in 7 cuments a category of	days	.]	
Document Category Received	Received Expires 12/20/201	6	Document Name Category	Information Contractive Background Chec	💌 Re	equired	*
Name Drug Screen Category	Received Expires 12/20/201	.6	Requested Issued Reference		Received Expires	12/20/2016	
			Authority Notes Status	ALL			*
						۹ +	

The authority dropdown allows users to associate the required doc to a specific state, or to list it as a federal level document if appropriate.

Document I	Information				
	× Active	× Re	quired		
Name	Background Chec	k		Ŧ	
Category				w.	
Requested	Ⅲ	Received	12/21/2015	▦	
Issued	⊞	Expires	12/20/2016	Ⅲ	
Reference					
Authority	ALL			•	
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The status dropdown is used to save any results associated with a document. For example, if we were adding a background check which someone passed, we may save the results as approved or clear. Consult with your manager to find out what statuses are being used under what scenarios, as this differs per client.

Document Information								
	× Active	× Re	equired					
Name	Background Chec	k		-				
Category				-				
Requested	I	Received	12/21/2015					
Issued	I	Expires	12/20/2016					
Reference								
Authority	IA			-				
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Status	^							
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Link an Exis	Status Approved Asymptomatic Clear Complete Denied Expired Immune Incomplete Negative PartiallyCompl Positive	eted						

Users then have the option to link an existing document (e.g. a document that has already been uploaded in the documents section of the employee record), or to upload an entirely new document. If users do opt to upload a new document, it will also automatically be saved to the documents page of the employee's record.

Document	ument Information								
	X Active	× Re	equired						
Name	Background Chec	:k		*					
Category				*					
Requested	■	Received	6/23/2015	▦					
Issued	■	Expires	12/20/2016						
Reference									
Authority	IA			-					
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Status				<u> </u>					
Link an Exis	ting Document		l	Jpload n	ew document				
Steve Holt.	docx	-	۹ (+						
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After filling out the document information for the required background check doc and saving our changes, notice

that the background check document no longer displays as missing in the employee avatar.

Note In this example, the expiration date is listed as 12/20/2016. When 12/20/2016 arrives, the background check required doc will reappear in the employee avatar. The expiration can always be updated.



Required Docs and Assignment Restrictions

In addition to being a good location to store information related to items like background checks and drug tests, required docs can also be used to prevent employees from being assigned if said documents have not yet been saved in Enterprise.

How is this accomplished? First, the required documents must be added to the order record. The required document page within the order record should look familiar as it mirrors the same setup we saw on the employee record:

Goblin Stock Picker/ 2 of 4 position	Manufacturing, Primary Dacker Customer ID: 4295011163 Is filled Order ID: 4295045200	Scheduled for: 12/21/2015 ◀ Ⅲ ▶		
	+ ♦ ₲ ★ ⊡ Q ↑ ♦	▶ tasks appointments	social	email
 visifile details adjustments interest codes invoice recipients po setup required documents vendors candidates documents integrations messages tasks search 	 Show only active documents Show only required documents Document Job Title Job Title Name Background Check Name Drug Screen 		Document Name Active Required Authority Category Notes	+ × t Information Background Check
employee				
customer				
order				

Note If a certain document is always required before working at a customer, consider adding the required doc to the defaults \rightarrow required docs page of the customer record. When saved on the customer record, the required document will always automatically populate in new orders created for the customer.



Now, when attempting to assign an employee to an order with required documents users will receive a soft stop (a.k.a. informational stop) alerting them that a required document is missing.



NOTE Please be aware that this assignment restriction is checking to see if the document is <u>listed/added</u> under the employees required doc tab on the employee record. It is <u>not</u> taking into consideration if that document is expired or if a document is not linked from the documents section of the employees record. That is why it is always best practice to be aware of what requirements an order might have and to always check the employee record prior to assignment to make sure the documents are up to date.

In the example below, the required doc (5 panel drug test) is listed/added on the employee's record, but it is not linked and is expired.

Joseph "Joey" Tribbiani		No tasks to display for your current filter settings							
	1244 London A Minneapolis, N	ve N IN 55405	ID: 4295083170 SSN: xxx-xx-6587 Branch: Fagan				Curren	tly viewing 0 of 339	923 tasks. View more
<u>A</u> 🥏 🗒	🔍 🖂 E 🔻	6 7	+ + G * C	Q 🛧 🖊	▶ tasks	appointme	nts social	email	+ ▼ ℃ →
 details aca activity tr assignm contact r candidac direct him education interpers interpers 	Missi This em 5 panel drug tes methods 29 e n onal	ng or Expired ployee has missin it ALL Missing Doc nent	Documents g or expired required docur Expired on 1/3/2021 Category Name 5 panel drug	Received	Expires	Not taking considerate the doc is e	g into oin that expired a cat	contain 7 days egory of rmation	× ×
interview	questionnaire		Category Testing	Expires	1/3/2021		Name	5 panel drug test	×
required	docs				-, -,		Category	Testing	
test score	es						Requested		
transport	tation						Received		
employe	ee						Issued		
custome	ər						Expires	1/3/2021 🔳	
order							License Numbe	r	
assignm	nent						Authority	ALL	·
contact							Hotes		
pay / bil	I	N	ot taking into						
reports		çon	sideratoin that				Status		
hrcenter	r	the c	loc is not linked				Link on Eul 1	Desument	
vendors							LINK AN EXISTING	Document	
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