Use Paperless Pipeline for storing HR (Human Resource) files for Agents and Employees

SUMMARY

You can use Pipeline's transactions to keep track of HR related files and information like hire dates, termination dates, contract files, license expiration dates, and birthdays.

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Create a Custom HR Status

To track HR files for agents/employees, we recommend creating a special status (e.g., "HR - Admin Only", "Admin Use Only" or "ARCHIVES - For Admin Use Only" - or wording appropriate to your company).

We recommend creating the HR status under either the "Closed" or "Fell Through" status category because transactions that are set to 'closed', 'fell through', or 'expired' are backed up in the next month's backups. If you add any docs after the close date/month, Pipeline will automatically back the transaction up the next month.

Learn how to Customize Transaction Statuses →

Hide a Custom HR Status from Dropdown Lists

If you prefer to hide the special HR transaction status from users, you can deactivate that status after you have created your HR transactions.

Deactivated statuses will no longer appear in status dropdown lists, but existing HR transactions that use a deactivated status will continue to use the status.

Whenever a new HR transaction needs to be added, the status can be enabled for a few minutes while adding the new transaction, then disabled again.

Create a Transaction for Agent Info

For each active agent, create a transaction named after them (e.g., "Joe Smith"). Give each transaction the custom HR status you created above. Now you have a place you can store things like agents' 1099s, agent independent contractor agreements, and any other HR type documents. Upload any such docs to each agent's transaction.

Tips for "HR Transactions"

To isolate HR transactions from your regular transactions, you can keep the HR transactions in a separate location called something like “HR Files” or “Personnel”. Then ensure that only the appropriate admins have permissions in that location.

If you need to track important dates for an agent, you can use checklist tasks with relative or absolute due dates to track license expiration date, birthday, etc. Pipeline will then send staff a reminder of these important events.

The More Info field of the HR transaction is also a great place to track other significant info about the agent. You can also use the Notes feature of a transaction for this info.

To give an agent access to their information on an HR transaction, designate that user as an agent of that transaction.

Pipeline Pro Webinar Recording: Use Pipeline to Store HR files for Agents and Employees

This webinar will cover techniques that make storing Human Resources files in Pipeline secure and convenient.

15:03

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