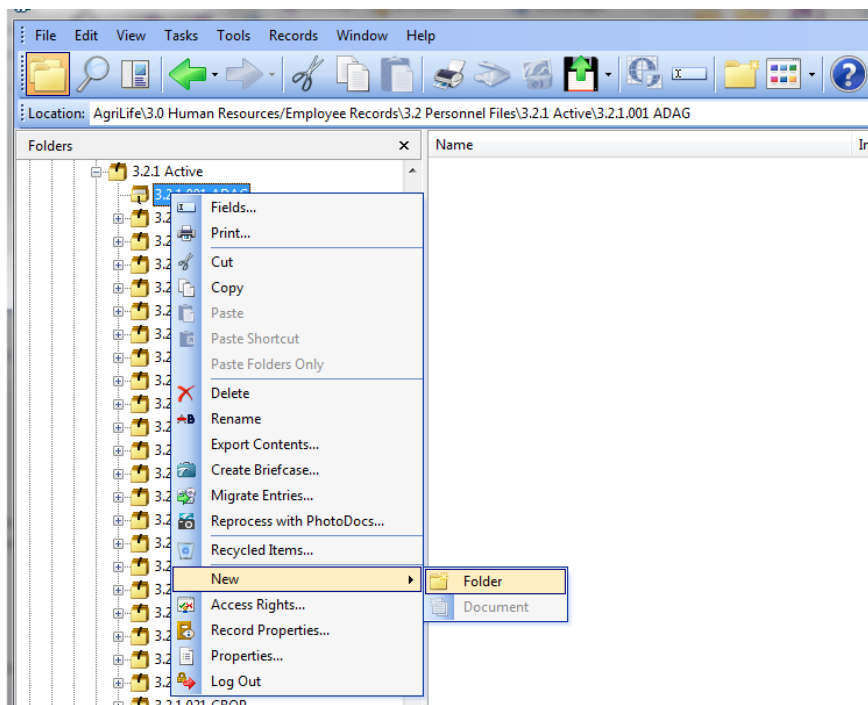


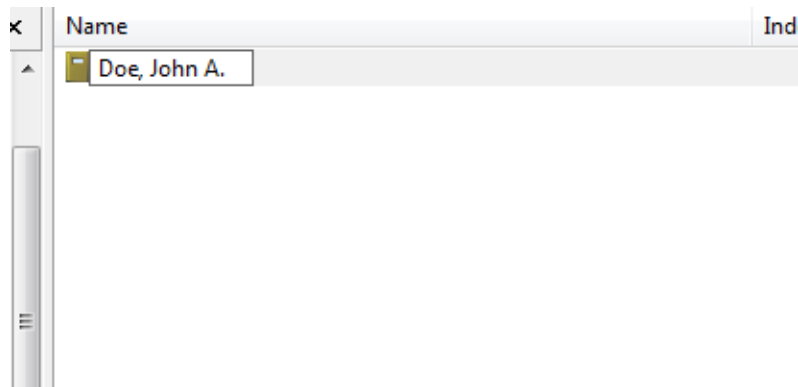
Creating Personnel Files in Laserfiche

The following instructions will be used to create the folders for each Unit's Personnel Files in Laserfiche. Do not add folders at the root level of the personnel file or confidential personnel file except those shown/included in the briefcases..

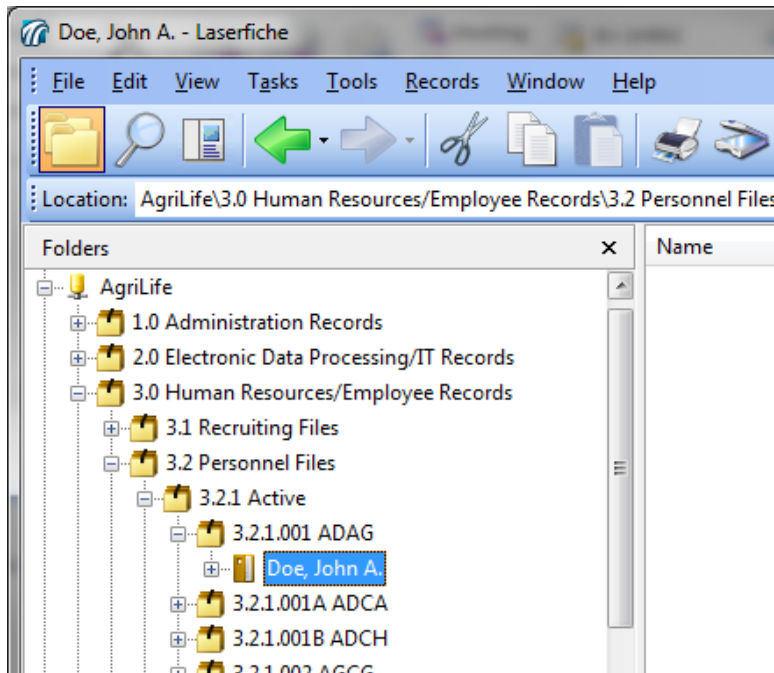
1. Open Laserfiche and go to Section 3, Human Resources./Employee Records, click on 3.2.1, then on the folder with the unit name where you want to create the Personnel File. Now right click on the unit name folder in the personnel File section, then select "New" and then "Folder" as shown below.



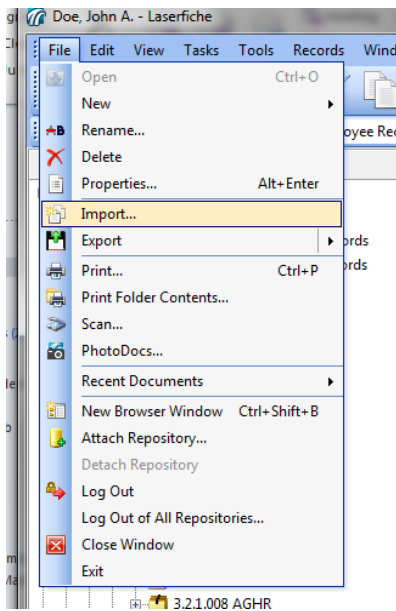
2. When this appears on the right side of the screen, rename the folder to the employee's name – Last Name, First Name and MI.



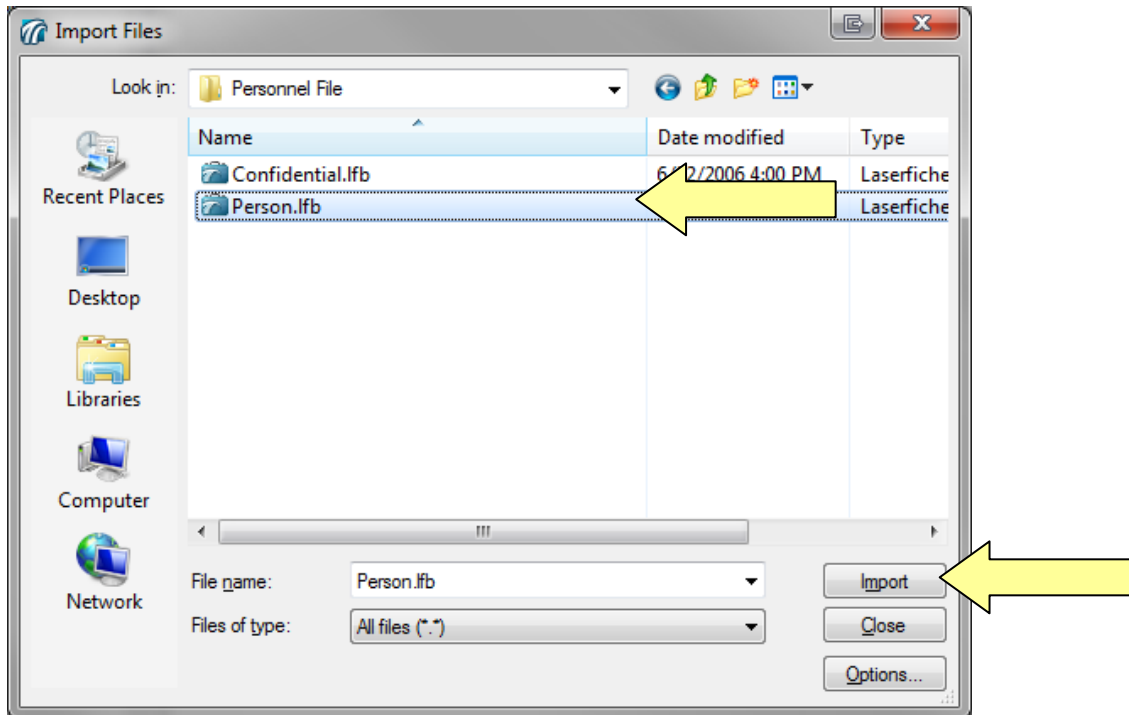
3. Now go back to the left side of the screen and click on the folder to highlight it.



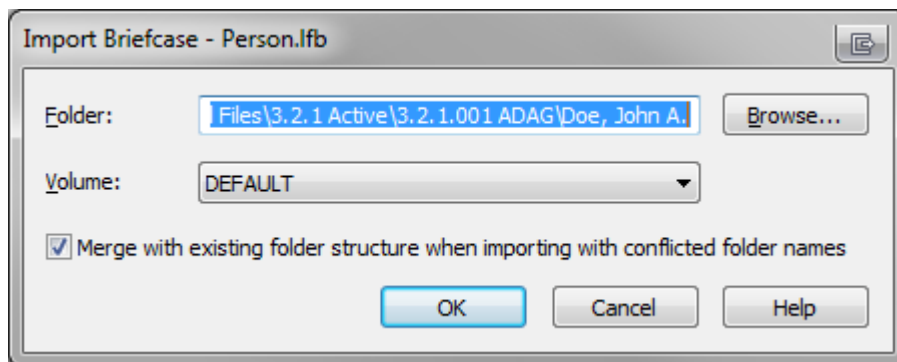
4. Now go to "File" in the upper left corner, then click on "Import"



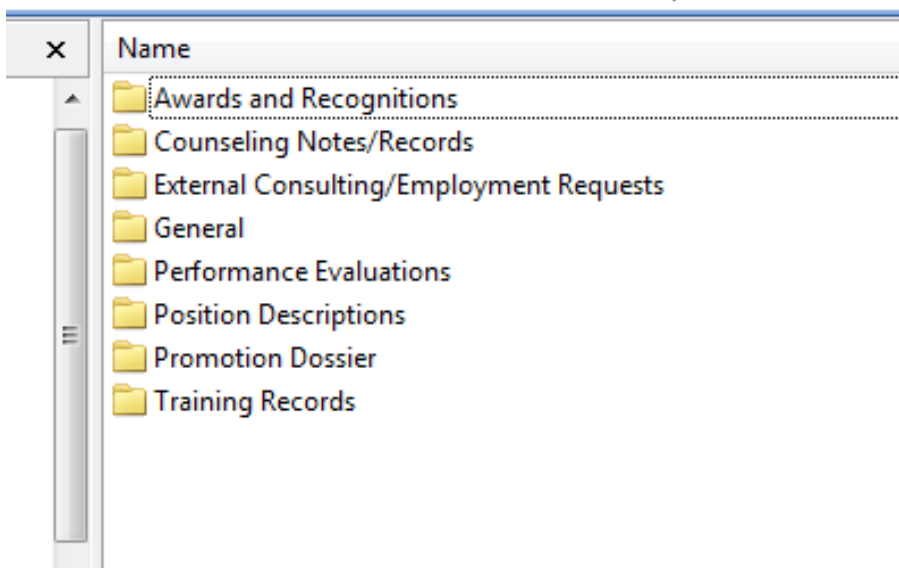
- When the “Import Files” screen pops up, select the folder in which you have saved the Person.lfb “Briefcase” folder. And click on the folder, then click on “Import”



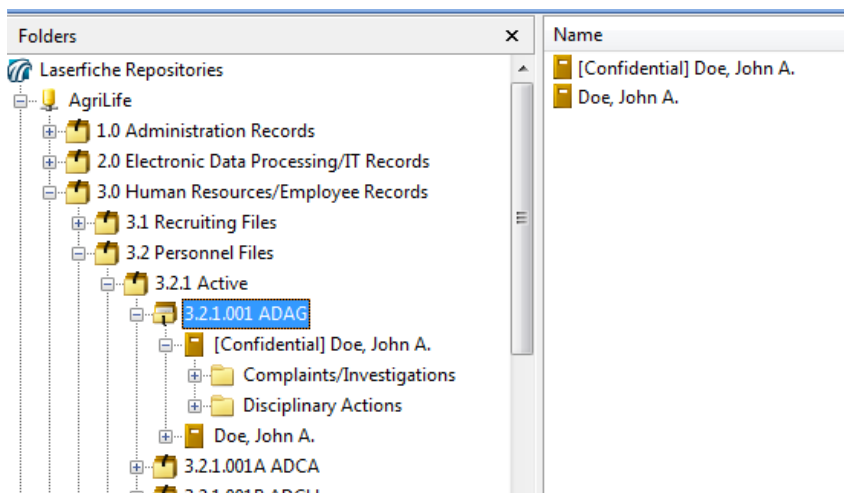
- When this screen pops up. Click on “OK” and the folders inside your employee’s personnel file will be created.



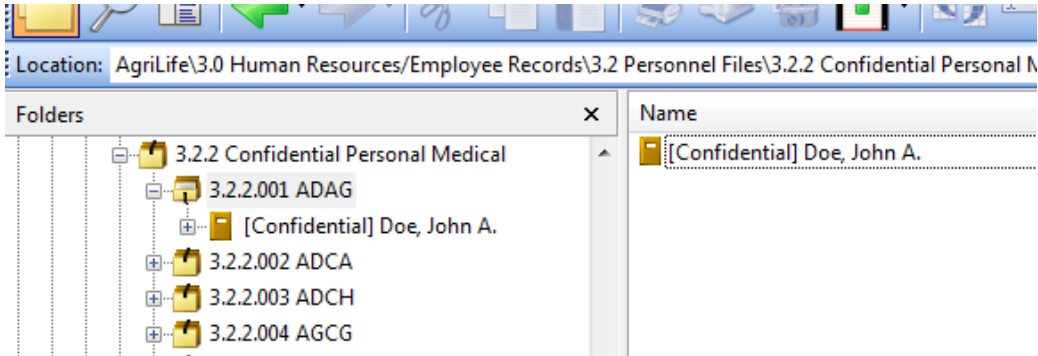
- The folders shown below are the ones created from the briefcase. If you need additional folders for Foreign National information, Salary letters, etc, do not create them at this root level. Create those folders inside an existing folder, such as the General folder.



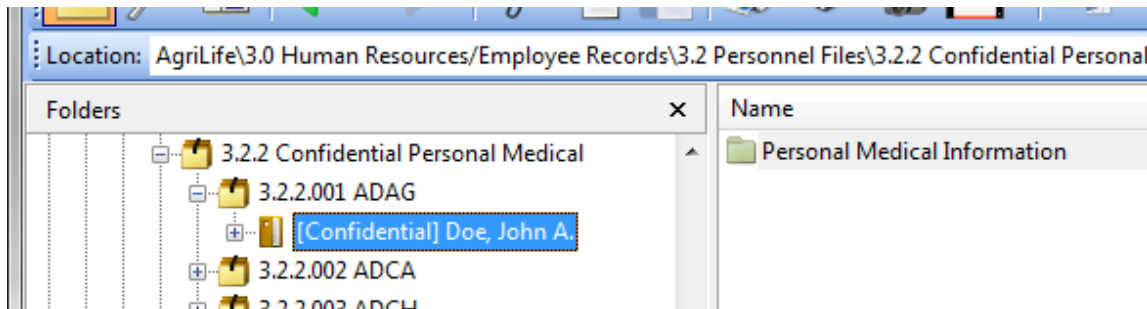
- Follow the instructions above to create a “Confidential” part of each employee is needed; however, when naming it, precede the employee’s last name with the word “[Confidential]” (with the square brackets). By naming it in this manner the Confidential section of all of the unit’s personnel files will be listed first and the other portion of the personnel file will be listed second thereby creating a separation of files and enabling control of access at different levels. The folder will be created as shown below. (Note there are only two folders in this confidential folder. All personal medical information is to be placed in 3.2.2 Confidential Personal Medical Information.



9. When a file is to be created to store confidential personal medical information such as FMLA documents, or a doctor’s note which contains personal medical information, it is to be created in section 3.2.2 Confidential Personal Medical. The folder is to be titled in the same manner as the Confidential folder in section 3.2.1, as shown below.



10. Inside the confidential folder, create a folder titled: “Personal Medical Information” as shown.



11. Additional folders may be created inside the Personal Medical Information folder; however, no additional folders are to be created at the same level as the Personal Medical Information folder.