

Introduction to P-File Imaging



Welcome to the Introduction to P-File Imaging. Personnel files are also known as P-Files. This is the first module of three in a training and document series on P-File imaging adoption.



Hello! We're happy you are interested in learning more about electronic P-File imaging. We hope your School, College, or Division will take the next steps and join the campus P-File imaging initiative. Please contact OHR Workforce Relations for more details and information. Thank you!

Workforce Relations, Office of Human Resources, University of Wisconsin-Madison

Next

Thank you for taking the time to review this introductory module. When you are ready, click Next to continue.



Learning Objectives

- 1 History
- 2 Description
- 3 Demonstration
- 4 Benefits
- 5 Assess Readiness

This training module will:

- explain how P-File imaging got started;
- describe what it is;
- demonstrate features of the technology;
- describe benefits of adopting P-File imaging; and
- help you consider your readiness for next steps.

Let's get started.

How did P-File imaging get started?



College of
Engineering



Division of
Information
Technology



School of
Medicine and
Public Health



School of
Pharmacy



Office of the Vice
Chancellor for
Research and
Graduate
Education



Office of Human
Resources

Please contact Office of Human Resources: Workforce Relations for a list of Schools, College, and Division that have implemented P-File imaging or in the process of doing so.

wr@ohr.wisc.edu

An initial pilot of five divisions, plus the Office of Human Resources, came together to create a consistent and scalable solution for electronic P-Files for UW-Madison campus. Since the successful implementation of the pilot additional Schools, Colleges, and Divisions continue to be on-boarded.

For a list of Schools, Colleges, and Divisions that have implemented or are in the process, please contact the Office of Human Resources: Workforce Relations.

What is P-File Imaging?

- Service provided by campus to manage and store P-Files



- Self service adoption model with technical assistance from DoIT's Imaging team

P-File imaging is a service provided by campus to manage and store electronic P-Files. ImageNow software by Perceptive Content is software that is used for P-file imaging on campus.

The service provides an efficient process to scan, store, and retrieve P-Files. Additionally, this service provides increased security for sensitive information compared to standard paper files.

While this is a self-service adoption model, technical assistance and support is available from the Division of Information Technology Imaging team.



What employee categories are included in P-File imaging?

Required

- University staff
- Academic staff
- Faculty

Optional

- Post degree trainees
- Student hourly employees
- Temporary employees
- Student assistants
- Other appointments

To use the P-File imaging system, a School, College or Division must agree to store personnel files for university staff, academic staff, and faculty.

Divisional HR also have the option to store personnel files for post degree trainees, student hourly employees, temporary employees, student assistants, and more.

What documents are included in P-File imaging?

Required

- Appointment letter
- Leave of absence request
- Outside activities report

Optional

- Emergency contact form
- Letter of thanks
- Tuition reimbursement request



ImageNow P-File
Document Crosswalk

Next

There are two categories of documents that are stored in the system: required and optional. Listed here are a few examples.

For a complete list of documents download the ImageNow P-File Document Crosswalk. Click Next to continue.



Demonstration

1. Scan a paper document into the system
2. Input an electronic document into the system
3. Retrieve a document stored in the system



Skip

Next

How does imaging for P-Files work? The next slides will walk you through a few short demonstrations.

Please note that Module 3 in the training series provides an overview of the software and instructions on how to use it.

Click Skip to advance to the benefits slide or click Next to continue.

Scan a paper document into the system

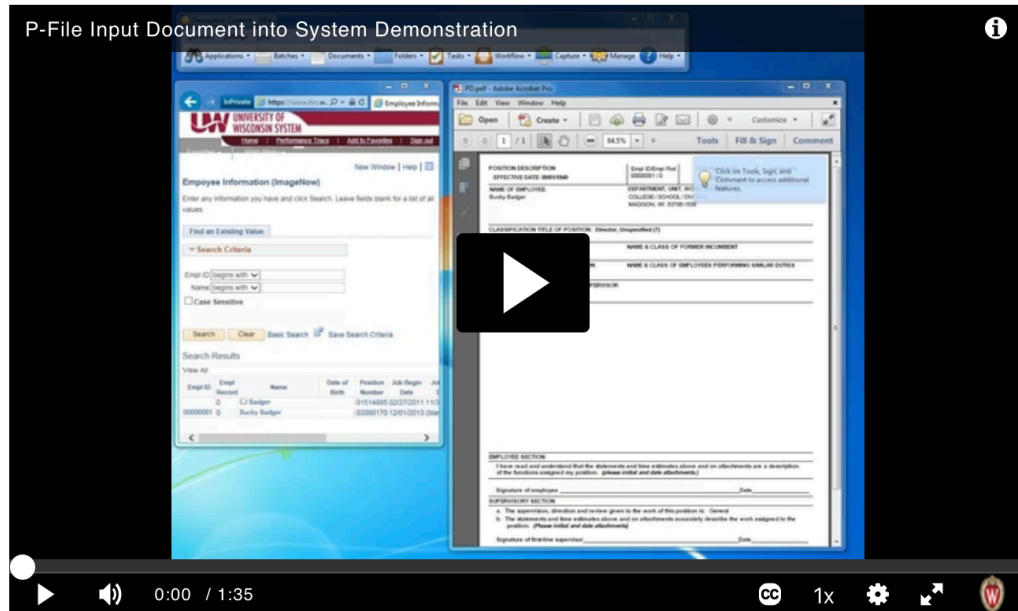
Press play to watch the video.



Click  to watch the video in full-screen.

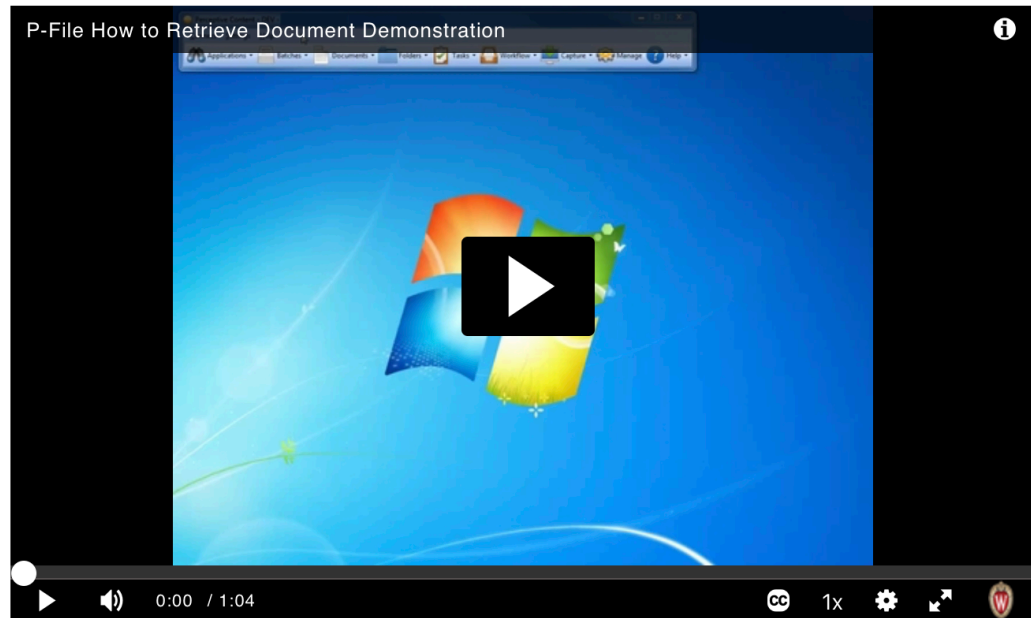
Next

Input an electronic document into the system



Next

Retrieve a document stored in the system



Next



Benefits

- Increased efficiencies for document accessibility
- Improved security of sensitive information
- Ability to better manage retention
- Potential for lower storage costs
- Consistency across campus with document management for P-Files
- Standard naming conventions for document types
- Ability to more easily find, sort, and retrieve documents
- Common interface across campus

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There are many benefits of adopting P-File imaging from increased efficiencies to improved security. Review the list of benefits. Then, click Next to continue.



Testimonials

The implementation for imaging P-Files went very well. We received thorough training for all of the staff in the Human Resources office. This was one of the smoothest system implementations we have had.

We would recommend onboarding for any Division that may not think they are ready for the system as it is quite easy and saves time and space, and is very secure.

ImageNow has been a nice addition. It is easy to learn how to use. It will definitely help save on space due to less paper.

Scanning documents is a simple process and goes quite smoothly. The search for scanned documents is very quick and easy. It is very helpful to have access to P-Files whenever I can log into my computer.

Because my position has transformed to be extremely mobile, ImageNow has allowed me to easily access the documents and P-Files I need in order to successfully perform my job, even while working at multiple campus locations.

Removing all the paper files and cabinets in the offices has allowed us space to add more workstations.

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Listed on this screen are testimonial from Schools, Colleges, and Divisions that have implemented P-File imaging. When you are ready, click Next to continue.

School, College or Division Readiness

- Leadership support
- Staff time
- Local IT support
- Funding for scanner and licenses
- Space for work area
- Desire for change



While there are many benefits to implementing P-File imaging; it's important to note that adopting P-File imaging is a significant commitment. Here are a few questions to help you determine readiness.

- Does your School, College or Division leadership support the effort needed to adopt P-File imaging?
- Does your HR manager and their staff have time to work on this project including time to learn the system and process?
- Do you have the internal IT resources needed to adopt and maintain P-File imaging?
- Is funding available to purchase a scanner and licenses?
- Do you have the space to dedicate to a document processing working area?
- Is there a desire and willingness to change your current process for managing p-file documents?

Please note that once you opt-in to imaging for P-Files, it is a permanent decision for your School, College or Division.



Next steps

- Assess readiness
- Check resources
 - Summary: UW-Madison P-File Imaging
 - Service Page: ImageNow
 - KnowledgeBase Documents: ImageNow by Perceptive Content
- Review Module 2: Preparing for P-File Imaging

Please contact Office of Human Resources: Workforce Relations with questions and to request onboarding consideration.

wr@ohr.wisc.edu

A School, College or Division that is interested in next steps should assess for readiness, check the resources listed here, and review Module 2 of the P-file imaging training series.

In addition, you can reach out to Office of Human Resources Workforce Relations for more information. Be sure to let them know if you would like a referral to an adopter of P-File imaging to learn about their experience.

Thank you for your time.