

# Automate Personnel Change Requests

Anyone who's dealt with a paper-based approval process can appreciate the situation facing the City of Newburgh, NY. A personnel change request form and multiple supporting documents could have taken days or weeks to route. It was virtually impossible to track the request as it moved through the approval cycle, sometimes traveling between municipal facilities.

In an increasingly privacy-conscious world, sensitive information, including salaries and Social Security numbers, was put at risk as the personnel folders routed from desk to desk.

## Paper Had to Go

When John Aber, Newburgh's City Comptroller, came on board, he recognized the problems. "Requests for hire would literally get lost," he recalls. "One uniformed police officer worked without pay for a month because a supporting document was missing. That was unacceptable."

"We were dealing with an antiquated manual process with no security."

## Automation Was the Answer

Aber knew what he wanted to do. "I strive for paperless processes," he says. As CFO of New York City's Office of Consumer Affairs, Aber had instituted a variety of automated processes, using Oracle and outside consultants, measures that were out of reach for Newburgh's budgets. "Still," he comments, "because we are a small city, any hours saved through automation matter even more to us."

When Aber learned about the electronic forms (eForms) capability of the City's Laserfiche system, he acted. "Glenn Kurcon, my CIO and I attended the 2014 Laserfiche Empower Conference in California." When he saw what was possible with Laserfiche Forms, Aber was hooked. "I made sure Glenn got the necessary training and we jumped in by automating our invoice payment process."

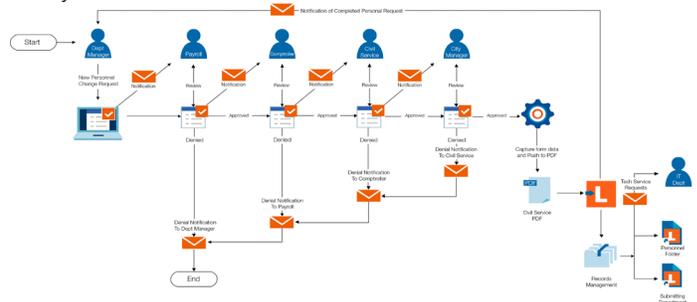
Aber and Kurcon quickly built a workflow using Forms. "If I'd known how easy it is to create and maintain a forms-based process when I was at Consumer Affairs," observes Aber, "I would have gone to Laserfiche back then."



## Taming the Paper Tiger

Kurcon was able to fit the project in with the rest of his responsibilities. "Once the process was up," he says, "there wasn't any impact on my workload; there's virtually no maintenance or user support involved." Aber gives General Code a nod for backup as well. "We have a great relationship that makes our small city's resources go further. General Code has reached out directly to help Glenn troubleshoot and fine tune. And at a high level, they've helped us figure out how to set things up so the pieces, such as our document repository, work together."

Now, a department head or administrative assistant can log in to manage a variety of personnel changes, including hirings, terminations, retirements, and salary and title changes. Instead of clips and sticky-notes to go astray in transit, he or she can attach electronic documents, such as a W-9, to support the necessary entries. At any point an authorized user can query Laserfiche to check on where a change request is in the process. Aber notes that he's reaching his goals for privacy and security. "The system controls access to documents by a given user's role in city government," he says.



*Laserfiche Forms makes it easy and intuitive to create and manage workflows, including rules and dependencies.*

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## Fast, Easy Submission

Mimi Naclerio is the confidential secretary for the Newburgh Department of Public Works. She raves about the automated change request process. “I love the program. It’s sophisticated but very user-friendly – almost self-explanatory,” she says. In particular, Laserfiche streamlines the work Naclerio does to manage salary step increments for the department’s 45 people, all of whom are Civil Service employees.

“Before,” Naclerio recalls, “the files I needed might be in another office, even in another building. Now I can pull up all the employee information I need right on my desktop. For me the number one benefit is time – submitting a change request is no longer a big, drawn out production. I can get it in and gone to the departments that need to review.”

“Nothing compares to the Laserfiche program for turnaround time,” she adds. “It used to take a couple of weeks for a change to route. Now, within a day or two it’s completed. I no longer have to plan on a month and a half lead time for the step increases coming up.”

**Supplementary Payroll Certification and Report of Personnel Change**  
Report all personnel changes on this form. Submit prior to payroll affected by this change.

**Department \*** Choose the department from the drop-down list below.

**Department Head Email \*** Enter the department head's email address so they are notified when the pink slip is approved. Click to the left of the @ symbol and fill in the first initial and last name of the department head.  
  
Please enter an email address.

**Employee First Name \*** Please enter full first name. No abbreviations or nicknames.

**Employee Last Name \*** Please enter full last name. Include hyphenated last name if applicable.

**Address \*** Please enter full street names and do not abbreviate street suffixes (i.e. use Street or Avenue instead of St or Ave). Please use NY or appropriate two letter state abbreviation. Type US for country.  
Street Address  
  
Address Line 2

*Newburgh Department Heads start the personnel change process by filling out an electronic form and attaching any necessary supporting documentation for automatic approval routing.*

## Approval Cycle Visibility

Amanda Scott-Aquino is at the other end of the process. As the Senior Payroll Clerk who enters a change after the City Manager gives it a final approval, she gets the call when someone in the organization wants to know what’s up with a scheduled raise. “Laserfiche takes the pressure off me,” she says. “I know exactly where a change request is – who it’s with and what’s the next step. When a department head calls, I can say it was approved on such and such a day.”

Aber adds, “During routing, if a necessary document is missing, the system kicks the form back to the responsible party. This way, when a request comes to Amanda from the City Manager’s office, she has everything she needs to do her job. The change updates in our payroll system almost instantaneously.”

## Accomplishing More With Less Work

While payroll changes make up the bulk of the traffic flowing through the Laserfiche personnel change request program, Aber points to another efficiency boost in how the eForm process streamlines the new employee onboarding process. “Everything is done up front,” he explains. “Vacation, health insurance and other benefits become part of the routing. The form even includes IT provisioning for computers and phones so Glenn Kurcon can get things ready to go for when the new employee shows up.”

Aber remains bullish on Laserfiche as his engine for automation.

“Laserfiche enables us to do a lot within a small city budget. We’re looking at all its advantages and how we can use it to its maximum potential.”

Plans on the table include automating travel requests, leave requests and contract management, as Aber continues his campaign to eliminate paper and save time and money.

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