

## “So You Need to Find a Paperless Onboarding System...”

If you're still on the fence about going paperless with your onboarding process, we want to invite you to take a step back, and view our brief and helpful, **paperless onboarding information resource** to help you make the decision. If you already know that paperless is where you want your onboarding process to go, this resource is designed to help you choose the right system that will address the unique needs of your organization.

In business, we all aim to save time, and money — we want to make sure that your paperless onboarding system does both of those; otherwise, what's the point? Getting straight to it, this paperless onboarding system checklist was designed by experts in the HR technology field to help buyers make the most effective choice for their organization.

### Is this paperless onboarding system secure, yet functional?

Think about your current process, and visualize what you will need the new system to do. Can anyone in your organization approve a form? In other words, can an on-location manager log into the system to take a look at an I-9, while your payroll administrator at headquarters processes their direct deposit form? You should be able to keep everyone's information secure, while also ensuring that the appropriate team members can access pertinent information.

Can you ensure that the appropriate team members can access pertinent information?

Y N  
☐ ☐

### Does this paperless onboarding system fulfill compliance needs?

Compliance — the function that HR professionals around the world constantly struggle to nail. Find out if this system is able to collect and track the information that you need. Should you be audited, is the system easy to work with in order to provide the necessary information? If the system that you're looking at doesn't take some compliance processes off your plate through automation, it is probably not as effective a system as others on the market.

Does this paperless onboarding system fulfill compliance needs?

Y N  
☐ ☐

## Is this paperless onboarding system customizable?

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Many first-time decision makers wouldn't know to ask this question. You need to find out if this software is capable of taking your specific forms, and making them digital. Are you limited to their standard forms? Are there costs associated with digitizing and integrating your own?

Are you limited to standard forms? Y N

☐ ☐

Are there costs associated with digitizing and integrating your own? Y N

☐ ☐

## Does this paperless onboarding system offer a fully paperless process?

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When vendors say "paperless" sometimes what they really mean is "less paper". An optimal system will offer the feature of e-signatures. Some paperless onboarding systems will still require a wet signature. Electronic signatures eliminate the need for postage, making the entire process digital and truly paperless.

Does this paperless onboarding system offer a fully paperless process? Y N

☐ ☐

## Does this paperless onboarding system offer the support that will meet our needs?

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Support seems to always be the area in which HR technology buyers end up feeling hoodwinked by their vendors. Ask about integration, training and ongoing technical support. Are there varying levels of service, and what are the costs associated with them? If support costs are high, and offerings are low, there is always a reason.

Are there varying levels of service, and what are the costs associated with them? Y N

☐ ☐

## Can we seamlessly change forms with this paperless onboarding system?

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There is always a new form in HR. Paperwork changes yearly, if not more frequently. How does this system handle changing forms? Is there support for that? Is this vendor flexible on the frequency of changing this paperwork that is often needed to remain compliant?

Can this paperless onboarding system seamlessly change forms, is there support for that, and is this vendor flexible? Y N

☐ ☐

Does this paperless onboarding system limit the number of packets we can send, or new hires we can onboard?

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Find out if there are package or service levels, or if this is a system without limit. If there are levels, can you switch yours freely? For example, if your company experiences certain periods of increased hiring activity, will you need to proactively upgrade your package in order to avoid fees, or roadblocks?

Does this paperless onboarding system limit the number of packets we can send, or new hires we can onboard?

Y N  
☐ ☐

When a major department decision falls into your hands, you're going to want to make an informed choice. This checklist was built to ensure that decision makers are as informed as possible. The average buyer isn't a paperless onboarding system expert — who is? This resource makes you one.

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**Happy Hunting  
from ClearCompany!**