Document Management



Employee Documents

This guide will walk you through accessing, adding, deleting, and downloading employee documents, such as the I-9 and Performance Documents, that are stored in the Questco Portal. There is also information about managing documents in the portal, descriptions of the various types of documents, and information about what documents employees will see on the Employee Portal.

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Access **Employee Details** by clicking ^{My Employees}>then **Employee Details**. Or click on the desired employee from the Company Dashboard.

*Note - An employee record is required to access the Documents menu.

To access **Employee Documents**, select the desired employee from the Employee Details Form>Click the **Actions Menu** >Click **Documents**.

	() Help	Actions
Benefit Overview		
Change User Password		
Documents		

The Document Name/Categories will display. To open the Category, click the desired Folder Name.

HR / Change /	Documents
Documents	
	Q Filter
	Name
	🗅 Benefit Documents
	C Enrollment Statements
	Ch 1-9
	Medical Documents
	C My Completed Documents
	C My Documents
	C Other Documents
	Performance Documents
	Signed Employee Documents
	🗅 Tax Forms

To view a document, click the **Document Name link**, the document will open in a popup window.

IR / Change /	Documents		Company: (102) DEMO CLIENT		Actions
Documents		Search	Go Prev Next		6
	Name	Category	Description	File Size	Last Modified
	■ I-9_102_C38844_Atester_J_202 I-9		I-9_102_C38844_Atester_J_20221006511706	293.82 KB	10/6/2022, 3:17 AM

Upload Document(s)

To add documents, select the desired sub-folder>click the **Upload** icon >Select the file from the file location>click Open. To select multiple files, click on one of the desired files>click Ctrl and click on the additional files you want to upload, then click Open. Or select multiple files then drag and drop them into the desired folder.

cuments	s / <u>My Documents</u>							
	Q Filter	Q Search	Go Prev	/ Next				
	Name	Category	Description				File Size	Last Modified
	Open							:
	\leftarrow \rightarrow \checkmark \uparrow \rightarrow This PC \rightarrow Desktop \rightarrow	New folder					ٽ ~	🔎 Search New folder
	Organize Vew folder)= • 💷 👔
	OneDrive OneDrive - Person Test Docum Test Docum Test Docum Test Docum		Date modified 5/3/2023 7:42 AM 5/3/2023 7:43 AM	Type Microsoft Word Docum Microsoft Word Docum	Size 12 KB 13 KB	•		

When the document is selected the following options are available on most documents.



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Document Details - Provides certain details on the selected document.

Document	: Details					×
Name:	alerts.docx					
Category:	Handbook & Policies	Doc Id:	a89532d9-d8ce-40c2-af23-9606	Saace07b4		
Created:	4/5/2023, 10:56 AM	Modified:	4/5/2023, 10:56 AM	File Size:	333.99 KB	
Description	x					
alerts						
						Close

Edit Description - Click here to change the document description.

cur beschption - alerts dock	~
Category: Handbook & Policies	
Description: alerts	
alerts	
Save	Cancel

Delete Document - To delete outdated documents>select the desired document by clicking the box to the left of the document. Once selected a more detailed menu will populate on the top right corner of the page>click the trash can icon. ***Note** - This functionality is limited by document type, not all documents can be deleted.

A second message will appear to verify deleting the document>click Yes to complete the deletion or No to stop the deletion. ***Note** - once deleted the document cannot be retrieved.

Delete document	×
Are you sure you want to delete the selected document?	
I	Yes No

Download Document - Click here to download the selected document.

Change Document Category – Click here to move the document to a different category/folder. ***Note** – This functionality is limited by document type, not all documents can be moved.

	(Q. Filter	Search	Go Prev Next	0 🗹 🛧 🕅
	Name	Category	Description	Change Document Category:
<u>~</u>	🚨 Accident.pdf	Employee Document (ESS Unchecked)	Accident.pdf	1-9
	Copy of Supply Request Form	Employee Document (ESS Unchecked)	Copy of Supply Request Form.xlsx	Employee Document (ESS Checked)
	Electronic Consent_102_E6794	Electronic Consent	Electronic Consent	My Completed Documents
	HRPYDBRUNQUE924004041vx	Employee Document (ESS Unchecked)	HRPYDBRUNQUE924004041vxuvveeprxaciudkkomefvhnu49878.XLS	My Documents
				Other Documents
				Performance Documents
				Signed Employee Documents

To complete the transfer click, **Confirm** on the confirmation statement.

铝 Switch Document	×
Switch document category of selected documents to My Documents	
Confirm	Cancel

To return to the Documents list click>Documents.

HR / Change /	Documents		Company: (102) DEMO CLIENT		Actions
Documents	1-9				
	Q Filter	Search	Go Prev Next		6
	Name	Category	Description	File Size	Last Modified
	I-9_102_C38844_Atester_J_202	I-9	I-9_102_C38844_Atester_J_20221006511706	293.82 KB	10/6/2022, 3:17 AM

Manage Documents

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Access Manage Documents by clicking ^{My Company} then Manage Documents. Or type Manage Documents in the search bar.

Documents are categorized by:

- Company Documents
 - Benefits & 401k Benefit Booklets and other benefit documents as they apply. Access to upload documents, edit the description of the document, and change the document category/folder. *Note-This folder is viewable by employees on the Employee Portal. Employees only have access to download documents in this folder.
 - Client Documents Company-specific documents. Access to upload documents, edit the description of the document, change the document category/folder, and delete unwanted documents. *Note-This folder is visible on the Employee Portal.
 - Handbook & Policies Company handbook and other company policies. Access to upload documents, edit the description of the document, change the document category/folder, and delete unwanted documents.
 *Note-This folder is viewable by employees on the Employee Portal. Employees only have access to download documents in this folder.
 - Payroll & Tax Payroll and tax-related information. Access to upload documents, edit the description of the document, and change the document category/folder. *Note-This folder is not visible on the Employee Portal.

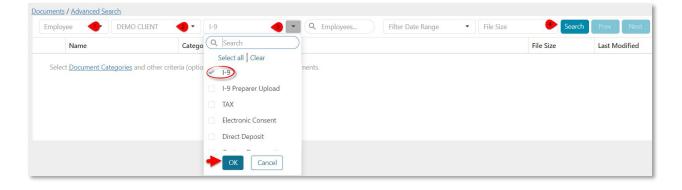


- Employee Documents Contains a folder for all employees. Click on the employee's name to open their folder. The same group of folders/categories that are accessed from the Employee Details Form>Actions Menu> Documents are also found here.
 - Advance Search Click the first drop-down and make the desired selection>Select a company or multiple Companies from the Select Companies drop-down menu>Select a or multiple Document Categories. Select a date range and/or file size, then click search.

cuments / Employee Docur	ments / Advanced Se	<u>arch</u>									
Company 📣 👻 S	Select Companies 🚄	•			Ŧ	Filter Date Range	×	*	Search	Prev	Next
Name		Categ	ory	Description							

The **Advance Search** feature can be used to download multiple documents at a time. For example, if you needed to download all the Form 19s for your employees:

- 1. On the first drop-down menu>select Employee
- 2. On the second drop-down menu>select the desired Company or Companies.
- 3. On the third drop-down menu select>19>click OK
- 4. Click Search



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The requested data will populate the page. To download all populated documents, click the box next to **Name** in the header row to select all documents in the document category.

ocument	ts / Advanced Search							
Emplo	oyee DEMO CLIENT	• 1-9	• Q	Employees	Filter Date Range	File Size	Search	Prev Next
EI.	lter_							
\bigcirc	Name	Category	Assigned To	Company	Employee	Description	File Size	Last Modified
	E I-9_102_8CFPMMS2TUH3PE6VJR	1-9	Employee Document	DEMO CLIENT	Ianine, Ida	I- 9_102_8CFPMMS2TUH3PE6	252.61 KB	1/6/2020, 4:14 AM
	■ I-9_102_A01930_SMITH_ME_202	1-9	Employee Document	DEMO CLIENT	Smith, Mary Elizabeth	I- 9_102_A01930_SMITH_ME	272.98 KB	11/23/2020, 7:23 PN
	I-9_102_A01930_SMITH_ME_202	1-9	Employee Document	DEMO CLIENT	Smith, Mary Elizabeth	I- 9_102_A01930_SMITH_ME	293.14 KB	1/10/2022, 4:44 AM
	1-9_102_A14938_EASTER_S_2022	1-9	Employee Document	DEMO CLIENT	Easter, Simon	I- 9_102_A14938_EASTER_S_2	293.56 KB	5/2/2022, 4:39 AM
	E I-9_102_A50770_Test_W_202304	1-9	Employee Document	DEMO CLIENT	Test, Workflow	I- 9_102_A50770_Test_W_202	294.76 KB	4/5/2023, 3:24 AM
	I-9_102_A81745_South_S_20191	1-9	Employee Document	DEMO CLIENT	South, Susie	I- 9_102_A81745_South_S_20	252.59 KB	12/3/2019, 2:06 AM
	I-9_102_A93313_Barker_D_2020	1-9	Employee Document	DEMO CLIENT	Barker, Dog	I- 9_102_A93313_Barker_D_2	271.52 KB	4/14/2020, 6:14 AM
	I-9_102_809707_Hagen_T_20210	1-9	Employee Document	DEMO CLIENT	Hagen, Test	I- 9_102_809707_Hagen_T_20	281.17 KB	5/18/2021, 4:36 AM
	E I-9_102_831139_Tester_8_20220	1-9	Employee Document	DEMO CLIENT	Tester, Briana	I- 9_102_B31139_Tester_B_20	292.77 KB	5/25/2022, 9:46 PM
	I-9_102_B37715_Atester_V_2022	1-9	Employee Document	DEMO CLIENT	Atester, Veronica	I- 9 102 B37715 Atester V 2	293.92 KB	9/14/2022, 10:04 PI

A download confirmation window will appear. Click **Yes, Download**.

Confirm Download	×
Download all selected documents ? This could take sometime. Do you want to continue with the download?	
Yes, Download Ca	ncel

A zip file will be downloaded to your computer's download location that contains all the selected documents.

• **Filter -** Search by employee's first or last name or by the employee ID number. Click the employee's name to access all folders/categories.



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Employee Portal Access

In the Documents Folder on the Employee Portal, employees have access to Company Documents and My Documents.

Company Documents

- Benefits & 401k Contains benefit and 401k documents uploaded by a company representative, or a Questco team member.
- Client Documents Contains documents uploaded by a company representative, or a Questco team member that does not require an employee signature such as a list of your company holidays.
- Handbooks & Policies Contains documents uploaded by a representative of your company, or a member of the Questco team.

Documents		
Documents Company Documents	Q Search	Go Prev Next
Name	Category	Description
🗅 Benefits & 401k		
🗅 Handbooks & Policie	25	

- My Documents Contains documents uploaded by an employee, a company representative, or a Questco team member. Employees have access to download only.
- Other Documents Contains documents marked (ESS Checked) in the original Employee Documents section of the Employee Details page. Employees have access to download only.
- **Signed Employee Documents** Contains documents that were signed by using an Alert. For example, a revised Employee Handbook that requires a signature from all employees. Employees have access to download only.

Documents			
Q Filter Q Search Go Prev Next Name Category Description CM My Documents Category Category	Documents		
Q Filter Q Search Go Prev Next Name Category Description CM My Documents Category Category			
Q Filter Q Search Go Prev Next Name Category Description CM My Documents Category Category	Documents My Documents		
C My Documents		Q Search	Go Prev Next
	Name	Category	Description
C Other Documents	🗅 My Documents		
	C Other Documents		
Signed Employee Documents	Signed Employee Docume	ents	