# 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.

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**.
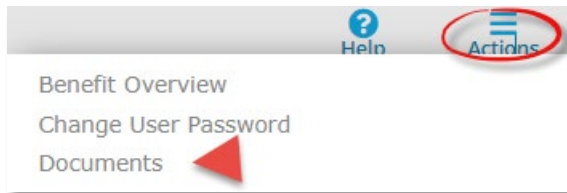
The Document **Name/Categories** will display. To open the **Category,** click the desired **Folder Name.**
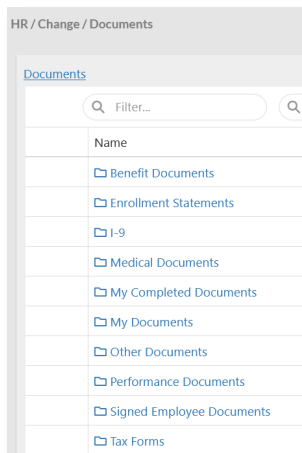
To view a document, click the **Document Name link**, the document will open in a pop-up window.


 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.
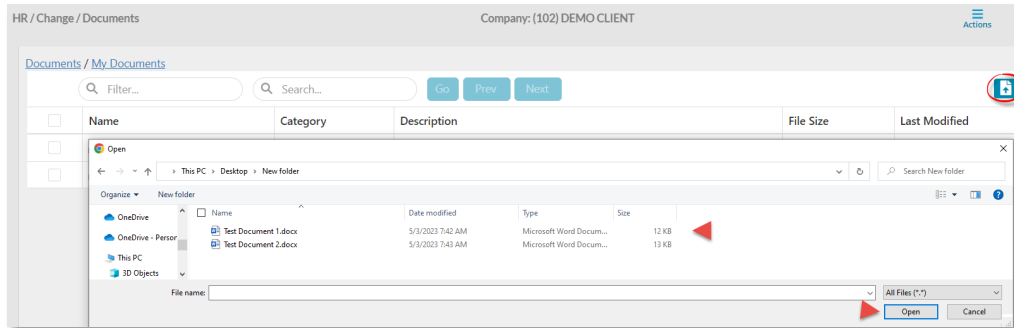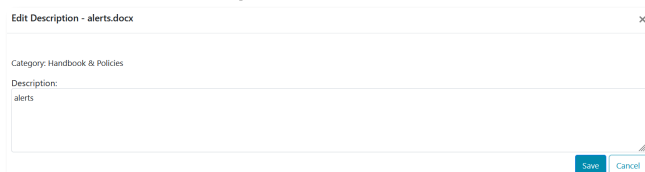

When the document is selected the following options are available on most documents.

 **Document Details** – Provides certain details on the selected document.
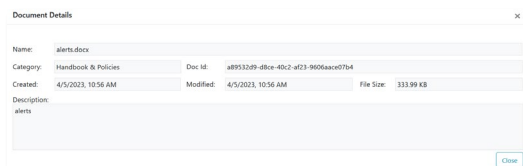
 Edit Description – Click here to change the document description.

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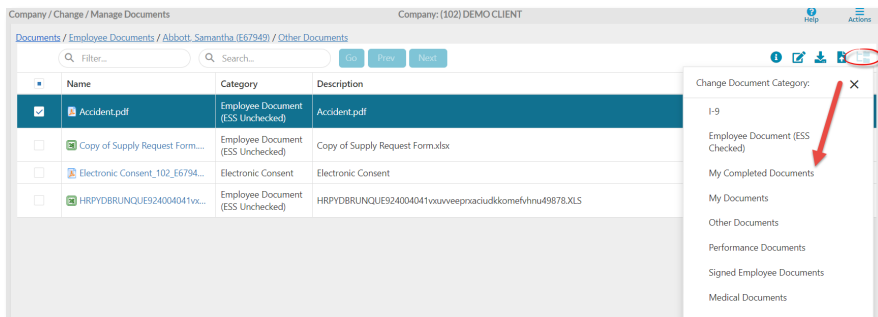
A second message will appear to verify deleting the document>click Yes to complete the deletion or No to stop the deletion. ***Note** – once deleted the document cannot be retrieved.

🗑 **Delete document** ✕

Are you sure you want to delete the selected document?

Yes   No
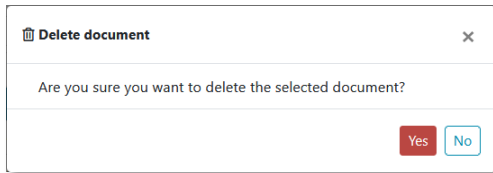
⬇ **Download Document** – Click here to download the selected document.

🗂 **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.

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

🗂 **Switch Document** ✕

Switch document category of selected documents to **My Documents**

Confirm   Cancel
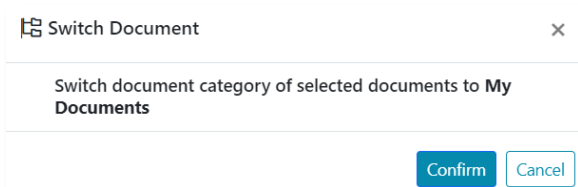
To return to the Documents list click>**Documents.**

Documents   I-9

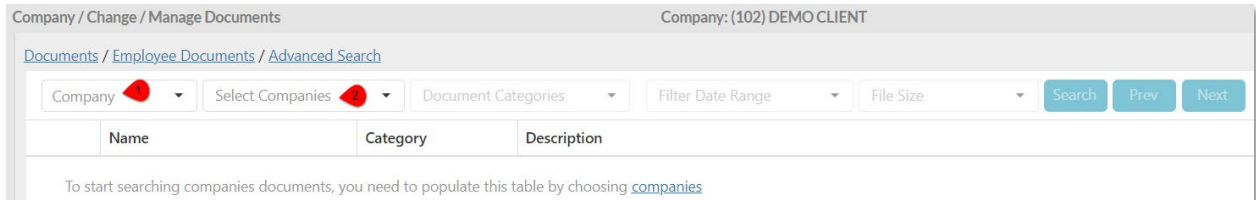|	Name	Category	Description	File Size	Last Modified
☐	📄 I-9_102_C38844_Atester_J_202...	I-9	I-9_102_C38844_Atester_J_20221006511706	293.82 KB	10/6/2022, 3:17 AM

Manage Documents

Access **Manage Documents** by clicking 🤝 My Company then **Manage Documents**. Or type Manage Documents in the search bar.
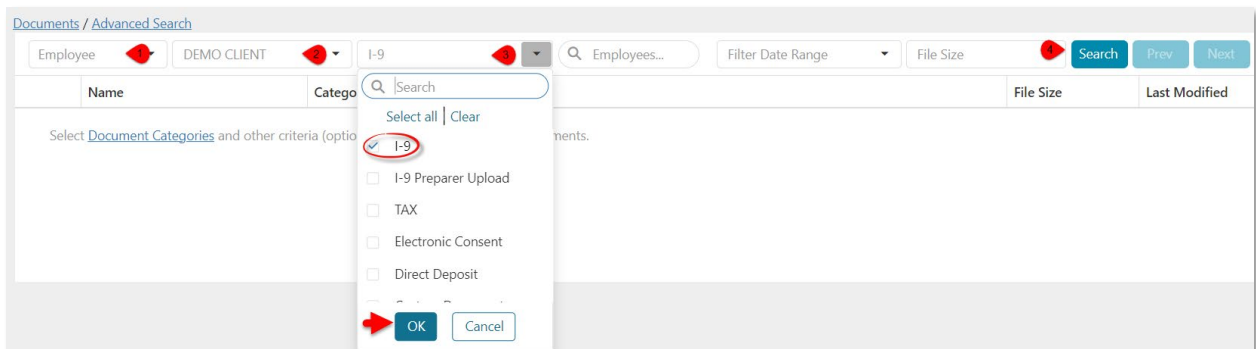
Documents are categorized by:

- **Company Documents**
  - o **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.
  - o **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.
  - o **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.
  - o **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.
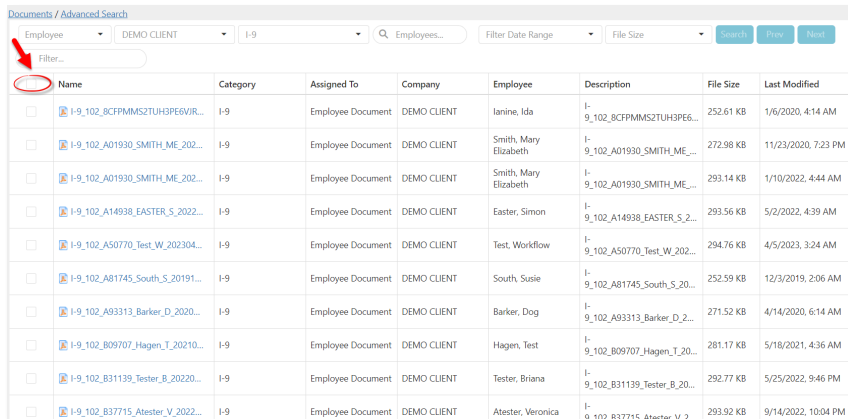

The **Advance Search** feature can be used to download multiple documents at a time. For example, if you needed to download all the Form I9s for your employees:

1. On the first drop-down menu>select **Employee**
2. On the second drop-down menu>select the desired Company or Companies.
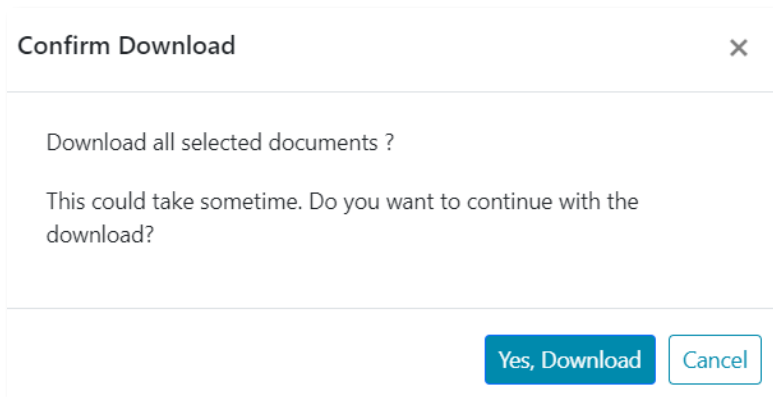3. On the third drop-down menu select>**I9**>click **OK**
4. Click **Search**

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.

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

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

- o **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.

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.
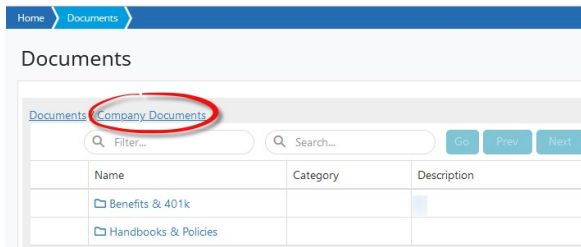
- **My Documents** – Contains documents uploaded by an employee, a company representative, or a Questco team member. Employees have access to download only.
- **Other Documents** – Contains documents marked (ESS Checked) in the original Employee Documents section of the Employee Details page. Employees 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.