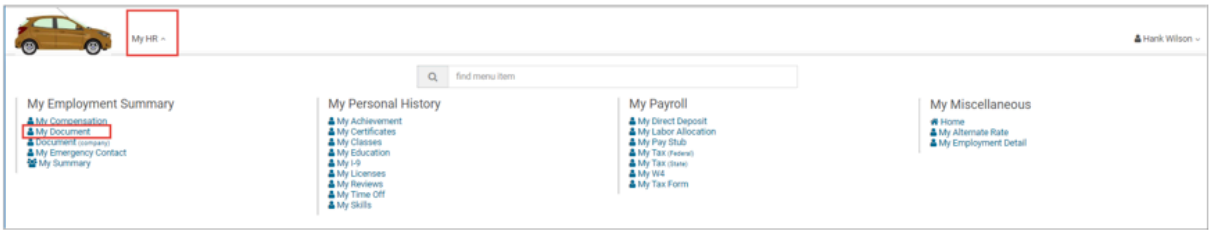
PayNortheast

Adding a Non-Signature Document and Associating it with an Employee

In the prior sections of this E-Signature Guide, we described how to create and associate **E-Signature documents** to an employee(s). What about regular documents that do not require an E-Signature?

Non-signature documents are any type of documents that will not require an E-Signature, for example, a resume, a customer appreciation letter, a new policy document, and so on. All employees (Admins, Managers, and Employees) can add a (non-signature) document to their own electronic personal folder (**Employee Documents** screen) which is accessible from their **My HR** menu screen.



All employees can upload a document to their personal folder from their **My HR – My Employment Summary – My Document** screen.

Associating a Document with an Employee

Employees can upload a non-signature document and associate the document to themselves only.

Managers and Admins, however, can not only upload a non-signature document and associate it to themselves, these two roles also have the ability to upload a document and associate it to other employees, depending on their role. The system rules for uploading a non-signature document is role-specific, according to the guidelines in the following table:

Role	Who can this role associate non-signature documents to?
Employee	A non-signature document uploaded by an employee is automatically associated with that user.
Manager	A Manager can upload and associate a document with an employee who reports to them directly. Note only to one employee at a time.
Admin or **SBAdmin**	An Admin or SBAdmin role can upload and associate a document with all of the employees who are in the companies that they have access to. Note only to one employee at a time.
Super Admin	A Super Admin can upload and associate a document with any of the employees of any companies of the Service Bureau. Note only to one employee at a time.

Refer to the sections below to learn how each role can add non-signature documents and how to associate the document to an employee.

All (non-signature) documents can be viewed on the **Employee Documents** screen, in the **View Document** screen which opens in a drawer. They can also be downloaded from there.

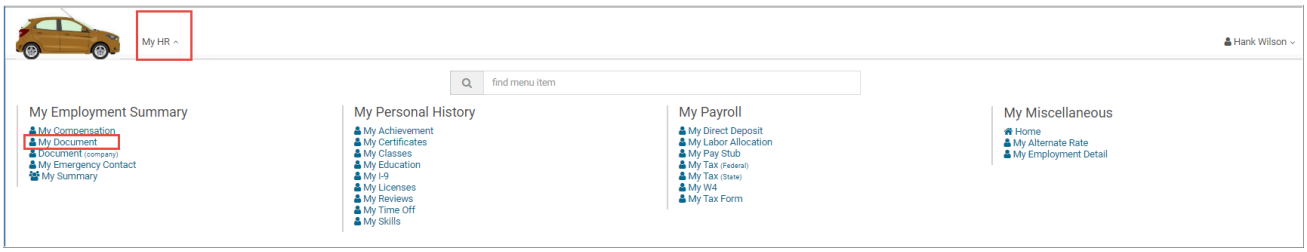
Note: Admins and SB Admins can make a non-signature document available to all employees in one action using the

Employees

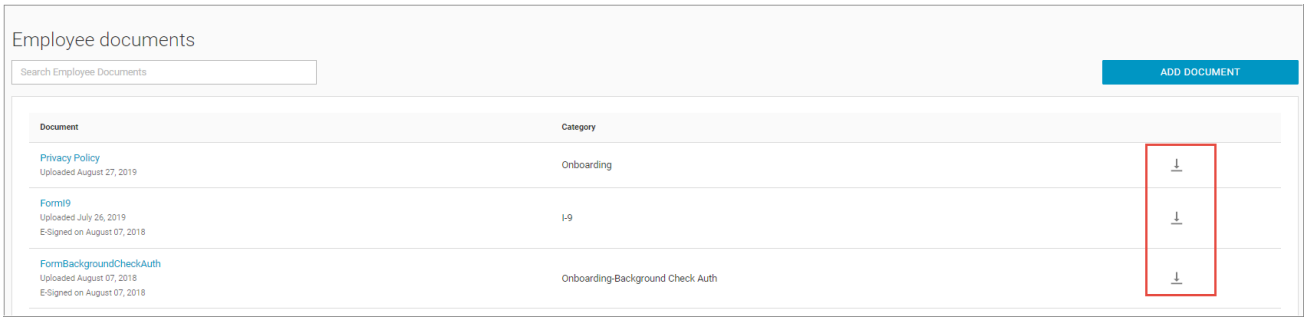
Employees (Base User role) can upload a document to their personal folder (**Employee Documents** screen) from their **My – HR** menu tab. Any non-signature documents that a base user employee role uploads are automatically associated with that user.

To add a (non-signature) document:

1. The Employee displays their **My HR** screen by clicking on the **My HR** tab on the **Dashboard**.
2. The system displays the **My HR** screen.



3. Select the **My Document** menu item from the **My Employment Summary** tile.
4. The system displays the **Employee Documents** screen.

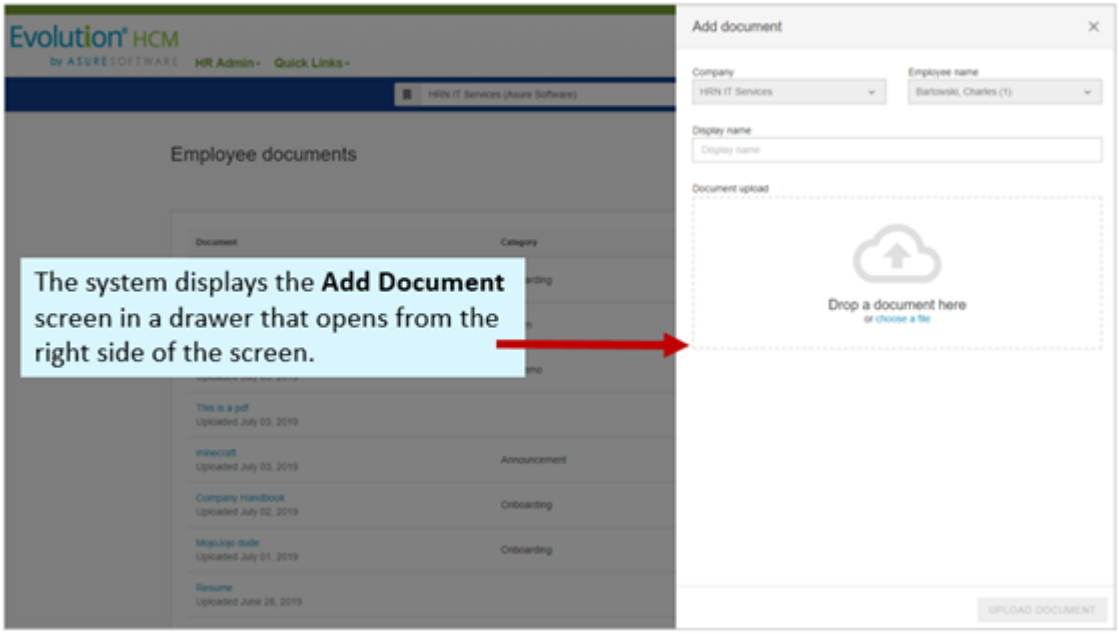


If the employee has no current documents, the system shows a message “There are no documents to display”. It will provide an **Add Document** button if so.

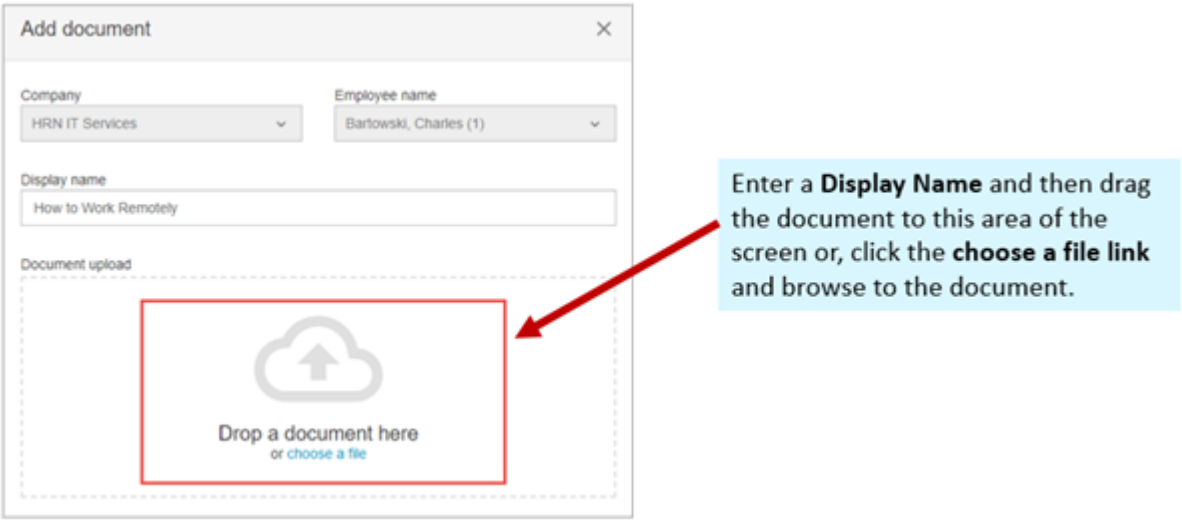
3. Click the **Add Document** button

at the top right of the Employee Documents screen.

4. The system opens the **Add Document** screen in a drawer from the right side of the screen.



7. The **Company** and **Employee Name** dropdowns should be already populated; if not, select your company and you as the employee name.
8. Drag the document you want to add to the **Drop a Document Here** section. Or, you can click the **Choose a File** link and browse to the document.



9. Enter a **Display Name** for the document.

The display name is the name of the document that appears on the **Employee Documents** screen; it can be different than the document's actual file name.

10. Click the **Upload Document** button at the bottom right

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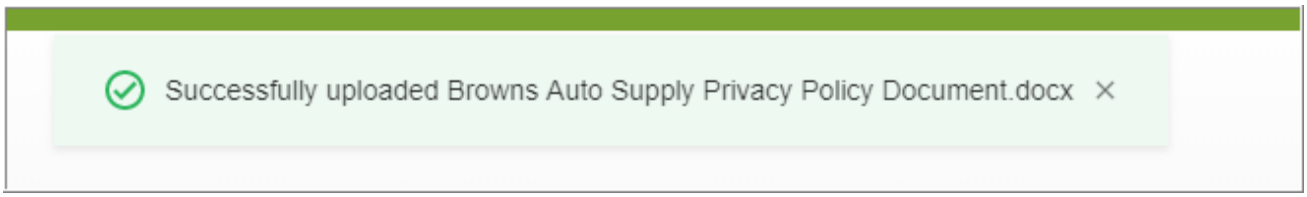
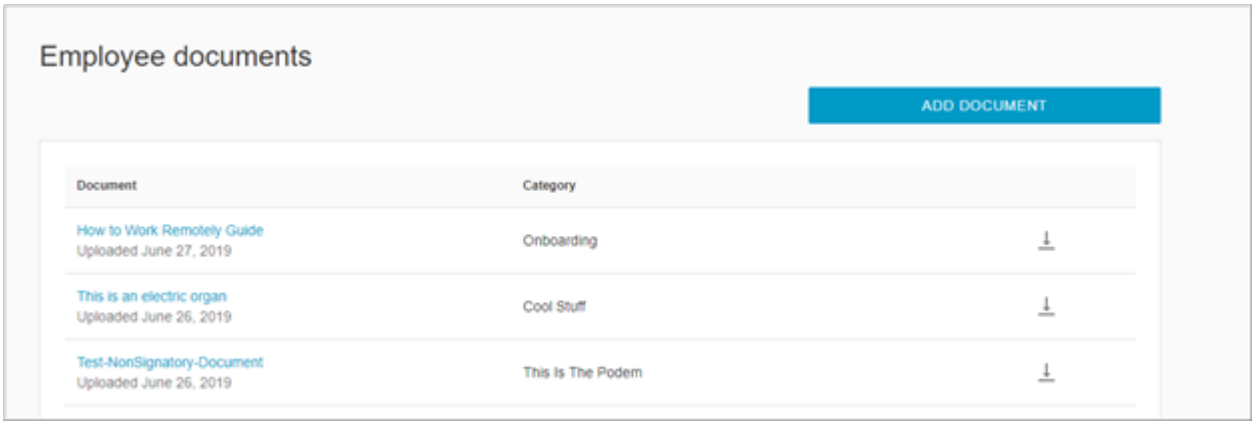
11. The system displays a "Successfully uploaded [document name]."



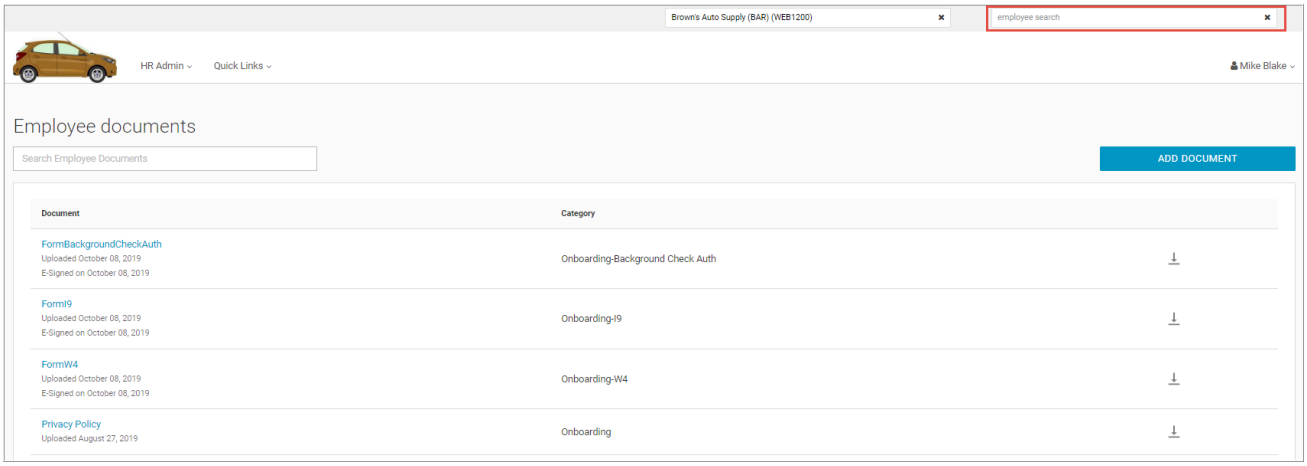
The document you just added now appears on your **Employee Documents** screen (**My HR – My Employment Summary – My Document**) and can be downloaded and/or viewed.



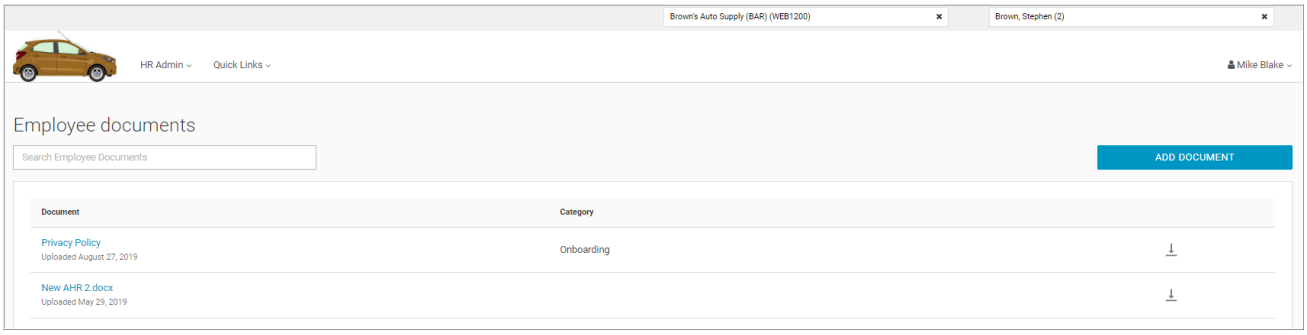
Managers

Manager user roles can upload a document and associate it with any employee who directly reports to them from their **Manager Service – Employee Maintenance – Document (Employees)** menu item.

1. The manager goes to **Manager Service – Employee Maintenance – Document (employee)**.
2. The system displays the **Employee Documents** screen.



3. Using the company and employee search boxes at the top of the screen, select the company and the employee to whom you want to associate the document with, if not already selected. Note that the employee must be one of the manager's direct reports.
4. The system displays the **Employee Documents** screen for that employee listing all of their documents.

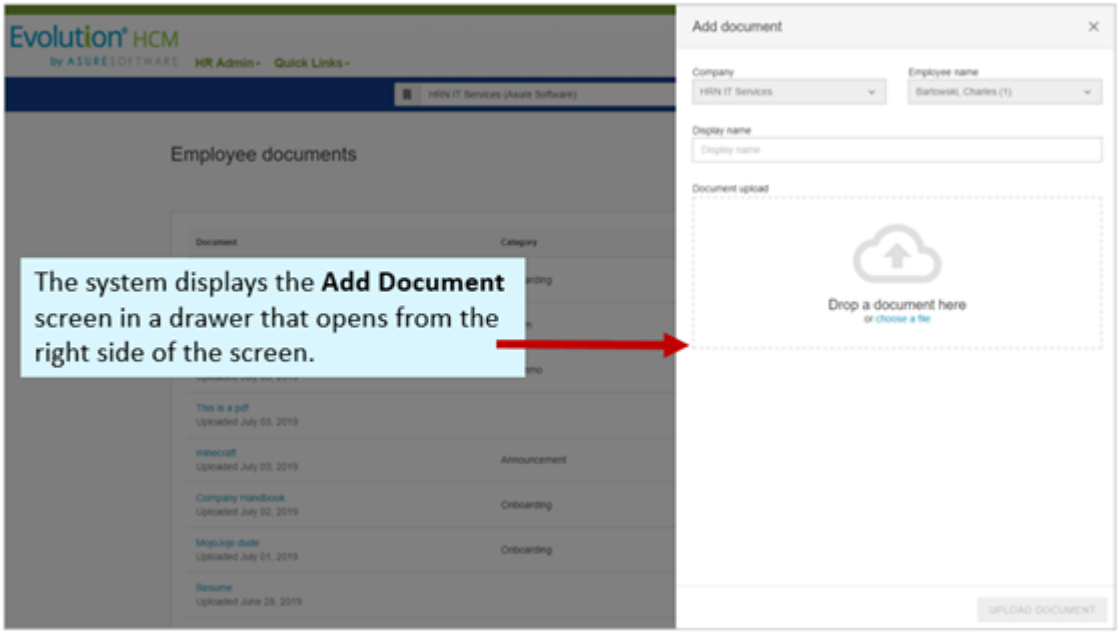


If the employee has no current documents, the system shows a message "There are no documents to display". It will provide an **Add Document** button if so

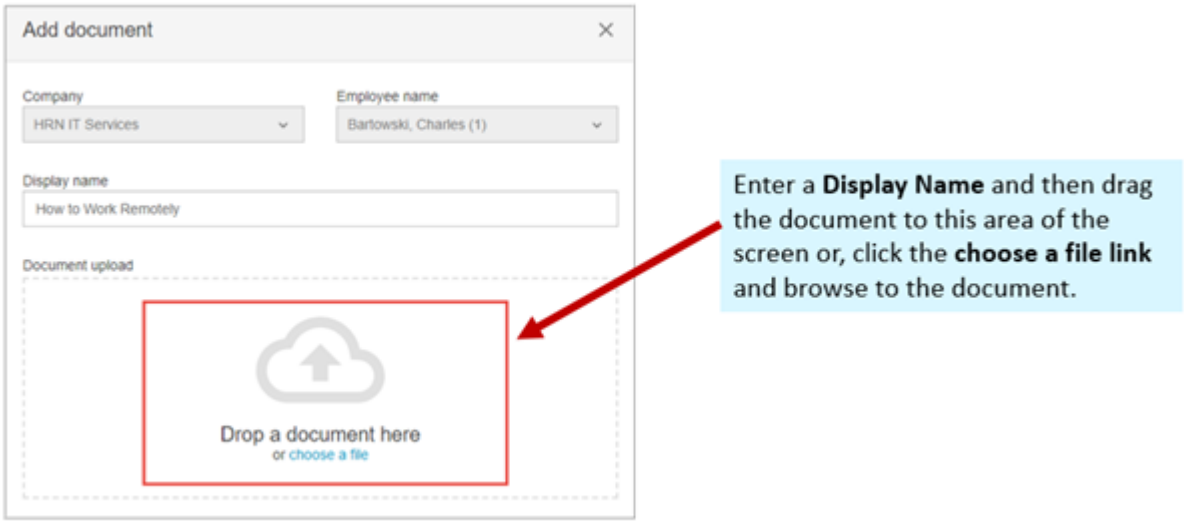
5. Click the **Add Document** button

   at the top-right of the Employee Documents screen.
6. The system opens the **Add Document** screen in a drawer from the right side of the screen.



7. Drag the document you want to add to the **Drop a Document Here** section. Or, you can click the **Choose a File** link and browse to the document.



8. Enter a **Display Name** for the document.

The display name is the name of the document that appears on the **Employee Documents** screen; it can be different than the document's actual file name.

9. Click the **Upload Document** button at the bottom right

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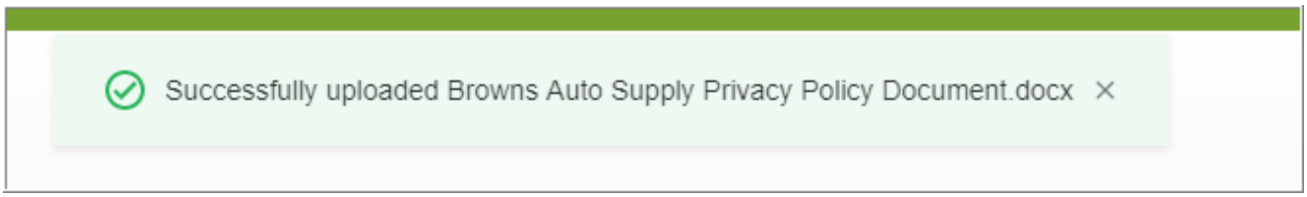
10. The system displays a “Successfully uploaded [document name].”



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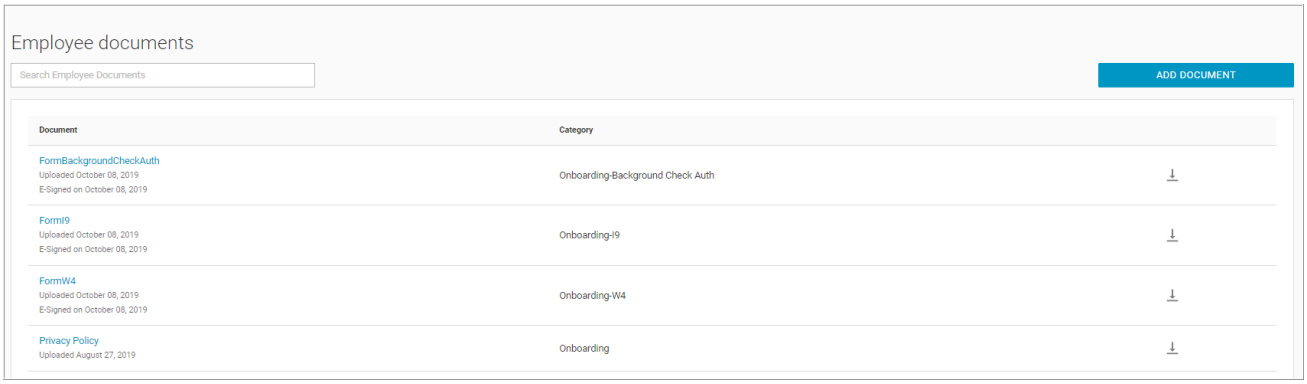


Admins

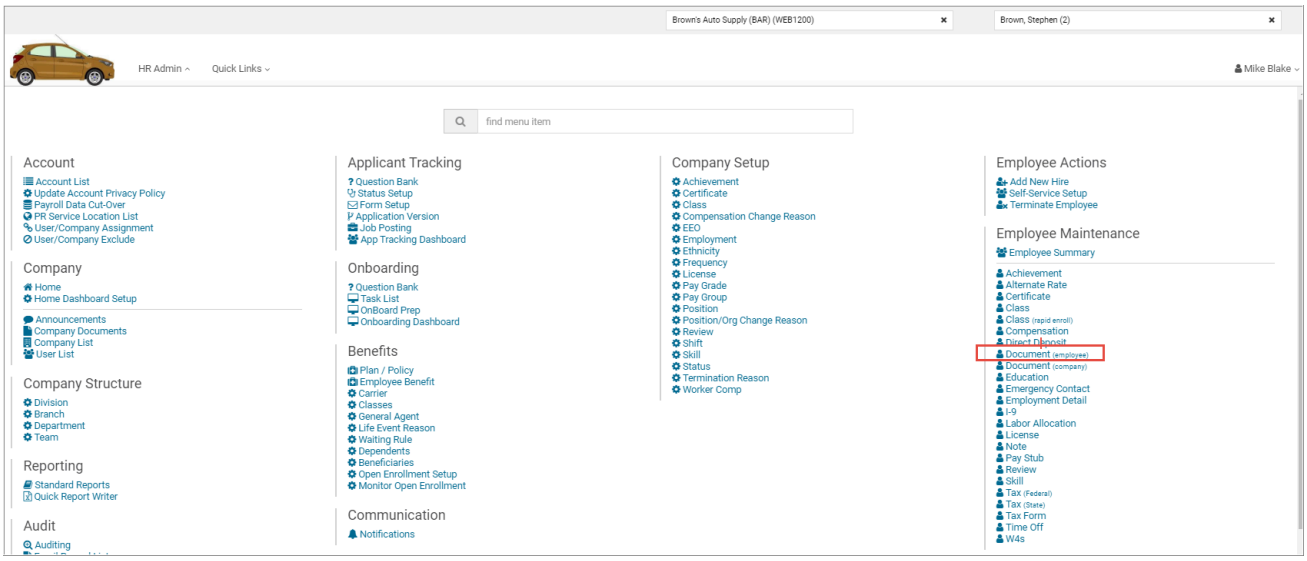
Admin user roles can upload a document and associate it with an employee according to their role as indicated below:

- **Admin** or **SB Admin** roles can upload and associate a document with all of the employees who are in the companies that they have access to.
- **Super Admin** roles can upload and associate a document with any of the employees of any companies of the service bureau.

Note: This process adds a document to a single employee at a time. See the section [Publishing a Document to All Employees](#) to learn how to make a non-signature document available to ALL employees at once.

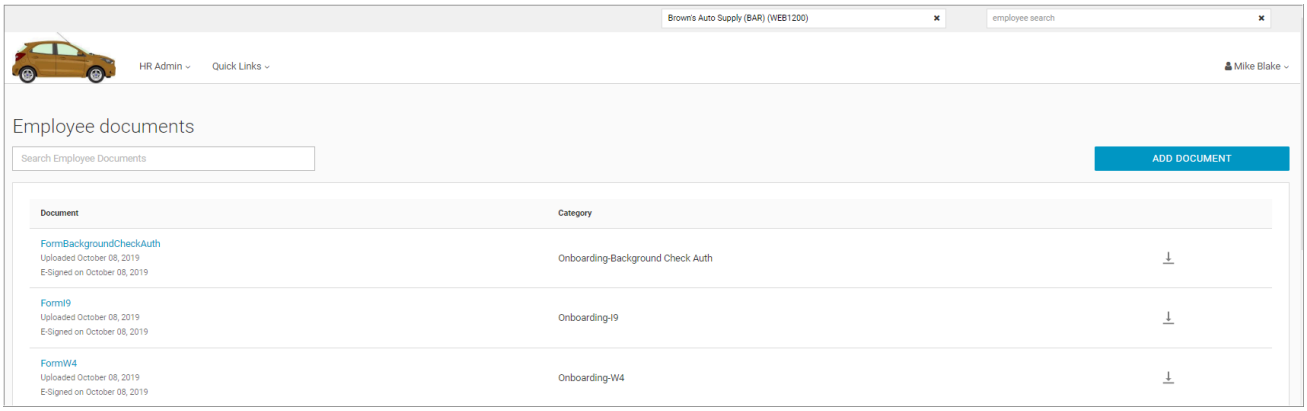
To upload a document and associate it with an employee:

1. The Admin goes to **HR Admin – Employee Maintenance – Document (employee)**.



2. The system displays the **Employee Documents** screen.

3. Using the company and employee search boxes at the top of the screen, select the company and the employee to whom you want to associate the document with, if not already selected.
4. The system displays the **Employee Documents** screen for that employee listing all of their documents.



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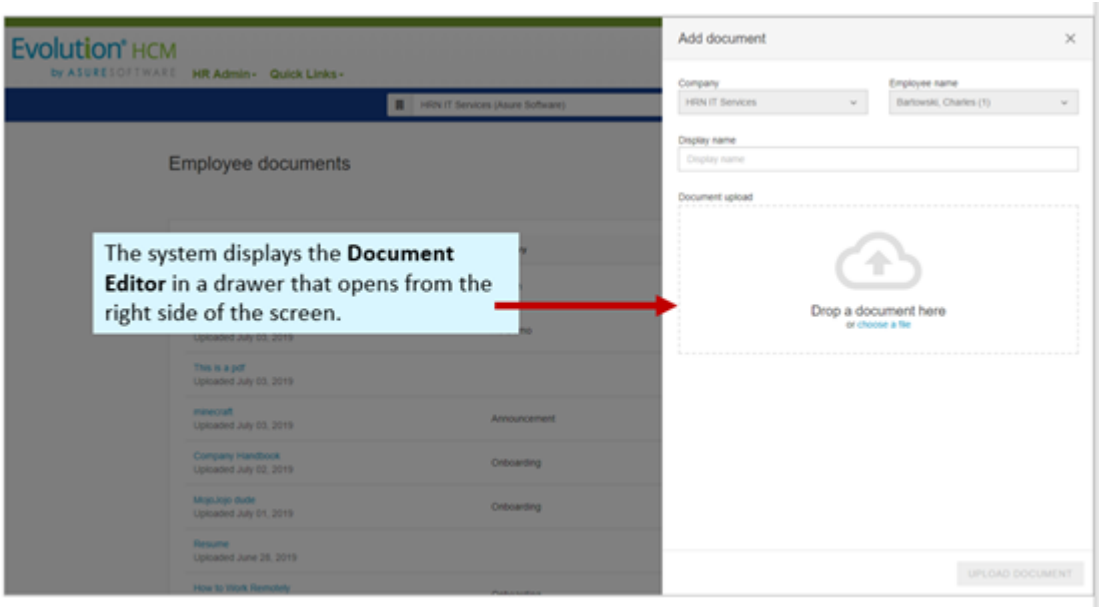

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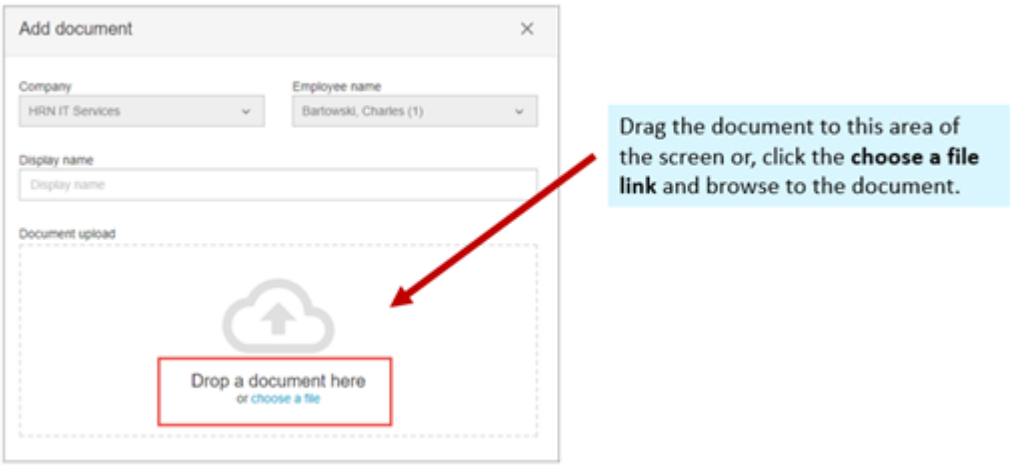

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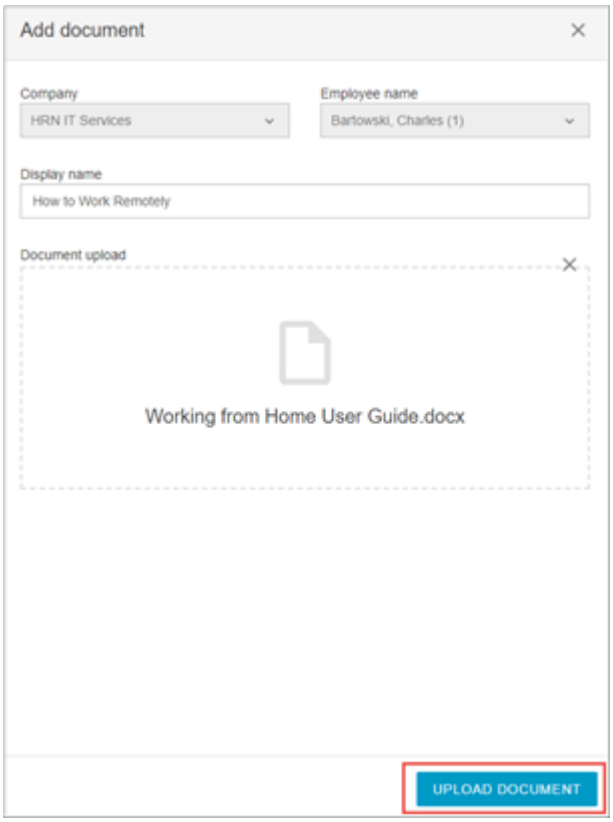

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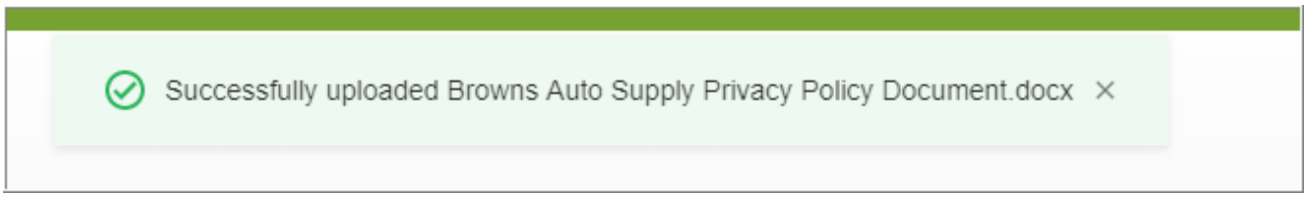

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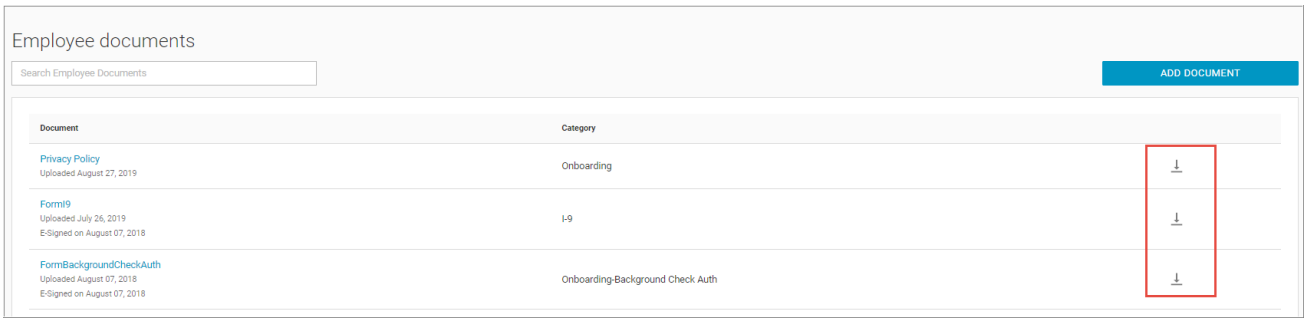

Marking a Document as Private

Admins and Manager roles can, when adding a document, flag the document as private so that they will have access to the document but not the employee. To learn how to mark a document as private when adding it, View the section titled:

Marking a Document as Private