



eHRFile Transition Recommendations and Tips

Understand which documents should be filed via eHRFile

All required personnel files must be filed via eHRFile. Some other common types of departmental files do not need to be filed because they are recorded through other university platforms or do not fit the criteria for a required personnel file. Use the table below to help decide. Reach out to your local HR professional for any documents you are not sure about.

Required Personnel Documents <i>(to be filed via eHRFile)</i>		Other Common Departmental Records <i>(not required to upload via eHRFile)</i>
Recruitment and Hiring <ul style="list-style-type: none"> Education and certification verifications Immigration documents Job/income verifications Offer letters Post offer employment testing (POET) Reference checks and interview notes Resume and application (those not included in eRecruit) 	Position and Performance <ul style="list-style-type: none"> Awards and recognition Discipline and/or performance correction Faculty reviews and letters Justification for pay change Performance evaluations (those not included in myPerformance or ePerformance) Position description Probationary letters 	<ul style="list-style-type: none"> Absence reports Academic P&T documents ePAF attachments eRecruit documents I-9 documentation myPerformance/ePerformance documents myVITA documents PCQ documents Perceptive Content documents Personnel Action Forms (PAFs) Supervisor notes Taleo documents Timesheets
Other <ul style="list-style-type: none"> Separation letters Student loan repayment program Tuition and related incentive benefits Unemployment correspondence 		

Know the retention limits for documents to be filed via eHRFile

There are different types of retention limit requirements for different types of documents. Most required personnel files are retained between five and 75 years. Documents that have passed the retention deadline may be shredded. If you are unsure, move forward with uploading and documents will be reviewed by Human Resources. Please review eHRFile Standardization List for retention limits for each document type.



Combine eligible documents by document type category

For many document types, individual documents can be combined to create one uploaded file. Some documents, however, must remain as separate, individual files per record. Consult the table below for recommendations per document type category and reach out to your HR professional for any questions. If you are unsure, move forward with uploading documents separately.

Must Remain Separate <i>(individual documents per uploaded file)</i>	Recommend to Combine <i>(multiple documents per uploaded file)</i>	
<ul style="list-style-type: none"> Interview notes and reference checks Job/Income verifications Justification for pay change Post offer employment testing (POET) Student loan repayment program Tuition and related incentive benefits 	<ul style="list-style-type: none"> Awards and recognition Delegation of authority Discipline and performance correction Education and certification verifications Faculty reviews and letters Immigration documents 	<ul style="list-style-type: none"> Offer letters Performance evaluations Position description Probationary letters Resume and application Separation letters



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- Unemployment correspondence

Tips for Preparing, Scanning, and Uploading Files

Preparation

- Collect the paper versions of the required personnel files to be filed via eHRFile.
- Sort papers by document type. Make note of document types which can be combined so that they can be scanned in a batch.
- Review records retention for each document type. Documents that have passed the retention deadline may be shredded or destroyed.
- Check papers for physical characteristics that may impede or affect scanning (e.g., check single or double-sided, flatten folds, remove staples, check for sticky notes, etc.).
- Ask your HR partner regarding any documents about which you are unsure.

Scanning

- Consider your location. Be mindful to keep documents confidential.
- Scan single-sided documents as 1-sided and double-sided documents as 2-sided.
- Set up a clear naming convention for scanned files to make uploading easier and more accurate (e.g., EmployeeName.EmployeeID.DocumentType.pdf)
- Do not shred or destroy scanned documents until the documents have been approved (i.e., approval email notification has been received).

Uploading

- Documents must be uploaded one employee at a time. Multiple documents can be uploaded in one submission.
- Once documents are submitted, they will be routed to Human Resources for review & approval.
- If changes are needed, the form will be recycled and available in your worklist to edit and resubmit.
- Once documents are approved, you will receive notification via email.
- Delete electronic files from your device and shred any physical files.

Additional Resources

- eHRFile Standardization List
- eHRFile Training Reference Guide
- Records Retention Guide

Related Policies and Rules

- [Collected Rules and Regulations, Section 180.060: Personnel Files](#)
- [Collected Rules and Regulations, Section 110.005: Acceptable Use Policy](#)
- [HR Policy Manual HR-125 Employment Records](#)
- [HR Policy Manual HR-125 Employment Records Q&A](#)

Thank you for participating in this important initiative! Your time and talent are valued and appreciated.