Making the Most of Document Management Software: 5 Areas Where Web Forms Streamline Data Processing

When you go to the doctor one thing is for certain. You can always count on having to fill out tedious forms as soon as you walk in the door. The same goes when applying for a job or attending a new school. Think about how many times you have filled out paperwork in your lifetime – probably more than you could count. Paper-based forms are hard to avoid.

What if there was a solution that could keep customers and employees from filling out these repetitive forms? Document management software provides an intuitive web forms solution simplifying data entry, capturing information and quickly processing for use. Let's take a look at the areas where web form solutions can eliminate inefficient business processes:

- **Employee Onboarding** – Human Resources departments thrive on paperwork. Especially when it comes to managing new hires. Luckily, web forms make the process much easier. When information is being entered into an online application, document management software automatically captures and repopulates that data onto other required form fields. The process of having to reenter the same information is eliminated and entry errors are prevented. This not only facilitates the process of filling out the forms, but it also streamlines future form entries. If the applicant is hired, their saved data will repopulate onto benefits enrollment forms, W-4s, I-9s and more. Additionally, the system automatically creates a PDF version of each application submissions for worry-free archival.

- **Patient Registration** – Filling out medical forms can be a long process. Patients have to fill in everything from their medical history, list of medications and insurance information. Implementing web forms can make for an improved doctor's office experience. With web forms, patients fill out their medical information from home, where they have access to all their records. Meanwhile, employees at the office can monitor who has submitted their forms and what has yet to be filled out. Once the information is filled in and submitted, the only thing left to do is arrive for your appointment. Intuitive web form solutions accept digital signatures in accordance with ESIGN regulations, keeping healthcare practices compliant and in line with modern technology.

- **Student Enrollment** – Online registration is a great way to save time and money for your school district or college, and web forms can help you achieve that. Online student enrollment allows schools to create forms that can stay in the system for the entirety of a student's education. This means important files are safe and secured from being lost or misplaced and can be quickly accessed when necessary. Confidential information is kept protected while general information can be accessed by anyone given permission. Even registering for classes is made easy. Students can select classes they want to take through an online form, and their advisors can monitor selections while guiding them through the process. By implementing an approval workflow, advisors can also grant access to students, eliminating the long process of having to get forms signed.

- **PTO Requests** – Balancing every employee's scheduled vacation time is a tough task. Leveraging document management software with web forms can make Paid Time Off (PTO) requests much easier to manage and more efficient. Digital software automatically accrues employee PTO, and when you're ready to use it the request is sent to the appropriate manager for approval. In order to keep web forms compliant, everything is tracked and audited to inform managers when a PTO limit has been exceeded. Automatic notifications can also be sent via email, alerting managers when a team member will be out, providing everyone with greater visibility.

- **Expense Reports** – By applying web forms as your software solution for your expense reports, you can create a customized workflow that meets your company's specific expense process in order to increase productivity. You can scan in your receipts and expenses, attaching them to a web form submission, as well as integrate data from credit card reports. Company expenses can be monitored and if something looks unusual or non-compliant, it can be automatically flagged once submitted. Web forms can also help decrease the turnaround time by streamlining submission, approval and reimbursement cycles. This process can even be executed when you aren't in the office. Managers can review and approve the reports anywhere and from any device.

Implementing a web forms solution into any business is the perfect way to utilize your document management software. Users can create unique forms that follow your company's everyday schedule, streamline the collected data, and index and store every form submitted without using paper.

Are you ready to start using web forms today? Visit square-9.com/contact for more information.