

UHY provides accounting, tax, and business consulting services to clients ranging from middle market to Fortune 500 companies. The firm has 18 offices in 10 U.S. states. UHY has been an Ultimate customer since 2007, using UltiPro for HR, benefits, and payroll, and responding to executives' reporting needs through UltiPro Business Intelligence.

## UHY Advisors uses UltiPro Employee File Management to Grow HR Shared Services Organization

### TOP CHALLENGE

UHY used a paper-based filing system, housing files at three regional offices around the country. When employee information was needed at the company's headquarters, a local HR team member would have to scan and convert an employee file into an emailable PDF, or even physically mail the entire folder.

### Solutions

HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside.

Company has been able to achieve significant savings with Employee File Management by eliminating paper and reducing the HR team's manual tasks, all while increasing access to HR documentation which is now secure and accessible 24 hours a day.

### KEY BENEFITS

-  HR team members based anywhere can digitize files, add them to Employee File Management, and easily collaborate on the documents that are inside
-  Company has been able to achieve significant savings by eliminating paper and reducing the HR team's manual tasks
-  Solution helps UHY meet the unique compliance needs of the accounting industry

### Results

The company was able to dismantle its regional file hubs and move everything to the cloud.

Employee File Management makes it much easier for company to share documents with external third parties securely.

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“UltiPro works alongside Employee File Management to advance our vision of a shared-services organization. With Employee File Management, HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside. These two solutions have helped make for a more national, cohesive HR team.”

**JEFF CUNNINGHAM, DIRECTOR OF INFORMATION SYSTEMS**

## Challenges

Until 2017, UHY used a paper-based filing system, housing files at three regional offices around the country. When employee information was needed at the company's headquarters, a local

HR team member would have to scan and convert an employee file into an emailable PDF, or even physically mail the entire folder. During this time, UHY began its evolution from a smaller, more

decentralized firm to a larger, national entity that strived to operate as a shared-services organization.

## Solutions

UHY selected Employee File Management, and went live in October 2017.

"UltiPro works alongside Employee File Management to advance our vision of a shared-services organization," said Jeff Cunningham, director of

information systems at UHY. "Activating direct access for employees in UltiPro gave them the ability to update forms such as their direct deposit and tax withholding. As a result, we lifted part of the burden of data entry and managing paper from local HR team members and began a process of

spreading the workload around our entire system. With Employee File Management, HR team members based anywhere can digitize files and add them to the solution, and easily collaborate on the documents that are inside. These two solutions have helped make for a more national, cohesive HR team."

## Results

According to Cunningham, UHY has been able to achieve significant savings with Employee File Management by eliminating paper and reducing the HR team's manual tasks, all while increasing access to HR documentation which is now secure and accessible 24 hours a day. The company was able to dismantle its regional file hubs and move everything to the cloud. Furthermore, the Employee File Management efficiencies that drive its business value are also helping UHY meet the unique compliance needs of the accounting industry.

"Employee File Management makes it much easier for us to share documents with external third parties securely," said Cunningham. "In the accounting

industry, we must go through a peer-review audit process to ensure that we have the appropriate accounting standards internally and for our clients, which also includes the review of HR records. With Employee File Management, we can share the appropriate number of files with external auditors, through minimal time and effort."

Cunningham noted that UHY's ability to wrap HR best practices around Employee File Management is due to the solution's simple user experience.

"Employee File Management is the easiest HR solution I've launched," said Cunningham. "The Ultimate launch team needs about a week to

configure the environment for a new customer. From there, it's easy to set up and easy to use. Minimal training was required on my part for my team to be successful with the solution. In addition, the customer service around Employee File Management is among the best I've ever worked with. I have access to my Customer Success Manager whenever I need him, without having to put in a help ticket and wait for a reply. I'm able to run things by him during our weekly meeting or shoot him an email, and I know I'll get a response quickly. Employee File Management is a great solution and we're extremely satisfied with it."

## SCHEDULE A DEMO

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