

MANAGEMENT MOMENT

January 9-15, 2022

Maintaining Accurate Files and Records

A critical part of any business is maintaining accurate records at all times. Accurate records allow us to know where information is located, be able to access information quickly, and limit access to only those that should have access to it. With the beginning of a new year, it is always a great opportunity to review your records and ensure everything is accurate, so you are starting off the new year on track.

There are several areas that you will be reviewing this week to ensure that the records at your location are as up to date as possible. Please review the areas listed below and ensure that your locations records are up to date. In addition to this beginning of the year review, please periodically review these important areas throughout the year to ensure that your records and files are always up to date and accurate.

Personnel Files

Your location should only have personnel files onsite for employees that are currently actively working at your location. Any time an employee resigns or is terminated, their personnel file is sent to the Infoplace USA Corporate Office at the end of the quarter. This step should be taken any time an employee is no longer working at your location.

Action: Review your personnel files at your location. If you have any files on hand for employees that are no longer working at your location, please submit a Resignation/Termination form to Sherry Yuill (sherry@infoplaceusa.com) for that employee. Once the form has been submitted to the Corporate Office, please attach the original copy of the Resignation/Termination form to the personnel file and set the entire file aside to be sent to the Infoplace USA Corporate Office with your next quarterly shipment of paperwork.

Paychex

Access to the Paychex time reporting system is managed by the Infoplace USA Corporate Office. When the Corporate Office receives a Resignation/Termination form from your location indicating that an employee is no longer active, that is when the employee is removed from the Paychex system. If you review the list of employees for your location and see team members listed that are no longer active, it most likely means that a Resignation/Termination form was not received. (See Personnel Files above)

Action: Please review the list of active team members for your location in Paychex. If there are any team members listed that are not currently working at your location, please email Sherry

MANAGEMENT MOMENT

January 9-15, 2022

Maintaining Accurate Files and Records

Yuill (sherry@infoplacusa.com) and work with her to have them properly removed from the Paychex system.

Passport to Shopping

The way the Passport to Shopping program is set up does not allow Guest Service Managers to view a list of team members that are active at your location. Only those with Administrator access can view this information. Each quarter you will receive a list of team members for your location that are currently listed as active in the Passport to Shopping program.

Action: When you receive the list each quarter of team members that are listed as active in the Passport to Shopping program, please review the list and respond with the names of any team members that can be removed from the program.

Kipsu

As with all programs that are operated at your location, access should be limited to team members that are actively employed at your location.

Action: Log in to Kipsu and select the 'User' option at the top of the screen. When doing so, a list of team members that are currently active for your location will be listed. (You will also be able to see the last time each team member logged into the program 😊) Only team members that are actively working at your location should be listed. If there are any former team members listed, please select the 'delete user' option when you click on their name. You may also email Katherine Bank (kbank@infoplacusa.com) to have team members removed from the program.

Gift Card Point of Sale Program

It is especially important to limit team member access to the gift card program (if applicable) to only active team members to eliminate any potential financial losses.

Action: Please log in to the gift card program for your location and review the list of active users. If you have any team members that need to be removed from the program, please email Katherine Bank (kbank@infoplacusa.com) to have the former team members removed. When emailing her, please also indicate the type of gift card program that your location offers.

MANAGEMENT MOMENT

January 9-15, 2022

Maintaining Accurate Files and Records

Sales Reporting Files

Infoplac USA records retention policy requires locations to retain paperwork for 13 months. The 13 months are defined as the current month that you are currently working on, and the previous 12 months that have concluded. Paperwork includes any sales reports, logs, tracking forms, and the like. When you archive a month that has just concluded, you should be discarding the file for the same period last year. (I.e. When you archive your December 2021 information, you may discard your December 2020 information.) When discarding information, please ensure that any paperwork that contains sensitive or proprietary information is properly destroyed.

Action: Review your current archived files to ensure that you only have the previously concluded 12 months on hand. Anything older than that can be discarded and destroyed.