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# Records Management

## A Traveling History

A federal employee's employment records takes quite a journey throughout a person's career. The records grow as permanent documents are added, but can also shrink as temporary documents are discarded after a statutory period. It can be converted from hard copy to electronic format, or be compressed into a transcript format. It travels with the employee from agency to agency, and is requested, sent, merged, stored, and maintained many times over. A combination of Office of Personnel Management (OPM), National Archives and Records Administration (NARA), and department and agency-specific policies dictate how employee records are managed, but it's ultimately up to the HR office to find the best way to implement their policies.

Good HR records management:

- Protects against loss or unauthorized use
- Accurately documents the employment history of individuals
- Organizes files to allow for easy locating and retrieving
- Retains records as long as the General Records Schedule requires, and properly archives or disposes of them

YRCI supports every element of HR records management, including records creation and maintenance, audit and clean up, and OPF to electronic OPF (eOPF) conversion.

## Flexible Service Offering

YRCI develops business solutions that match our customer's exact needs. On the large scale, we have assumed responsibility for entire HR file rooms. On the other end of the spectrum, we have provided professionals specializing in only parts of the HR records process, in order to complete a specific project, such as auditing OPFs to verify the accuracy of tenure groups and veterans preference. If you have a disorganized file room with folders that are not kept in accordance with OPM's Guide to Personnel Recordkeeping, YRCI can implement its proven quality assurance procedures to produce accurate and organized personnel records. If your group is burdened with a high workload stemming from the request, retrieval, issuance, and receipt of records, we can integrate into your team and support that specific activity. No matter the size of the project or the complexity of the requirement, we have the tools and experience to support your HR records management needs.

Streamlined and efficient HR records services is an activity that can have a wide-reaching and meaningful impact on government. Internally, faster responses to requests to retrieve information from OPFs, employee performance records, and employee medical folders, means faster completion of tasks involving employee records. Even externally, other agencies benefit from the maintenance of well kept files and speedy response times when they request documents for their own uses, such as determining creditable prior service. YRCI is proud to participate in the improvement of federal services.

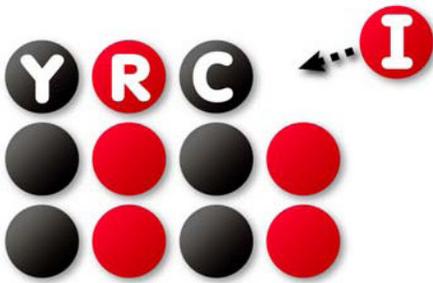
## eOPF Solutions

Many agencies are choosing to move from hard copy OPFs to eOPFs. While it is by no means an easy process, the efficiencies and accessibility makes it well worth the challenge. YRCI is ready to serve as your partner in eOPF transition.

YRCI supports its customers during each step of an eOPF implementation, including developing procedures for the transition process, inventorying OPFs for conversion, creating and maintaining manifests, purging unnecessary documents, scanning documents, building eOPFs in the customer's system and indexing documents, handling "exception documents" that fail the scanning process, and sending hard copy documents to archiving groups. From the first folder packaged for scanning to the last document indexed, we are ready for your eOPF implementation and subsequent maintenance.



HR Services



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### Past Performance Examples

YRCI has provided records management services to various federal agencies. Each of these agencies have experienced the efficient and cost-effective changes our records management services bring. Examples include:



**National Science Foundation.** YRCI has been responsible for NSF's employee records management since 2005. We developed processes and procedures to ensure records are accurate and current. This has led to a marked improvement in response time to re-

records requests and has completely eliminated the loss of records.

In 2009, NSF began to transition from OPF to eOPF. YRCI was a key partner in NSF's implementation of eOPF over the past year. We provided OPF reviewers to review each of the 1,200 OPFs. We purged the folders of documents that were not required on the right or the left side, and ensured that those on the list were retained. We also made general requests for information from appropriate sources, and placed purged documents into an envelope for employee pickup. We then inventoried, boxed, and manifested all OPFs for transfer to the scanning center. We created eOPFs and indexed newly scanned files. Additionally, we participated in employee training and educational activities associated with the implementation of eOPF.

One of the most difficult aspects of eOPF conversion is dealing with "exception documents," or documents in such a condition that the standard scanning process does not allow for proper indexing into the new eOPFs. These documents were impeding the eOPF transition process. We responded by identifying individuals with the backgrounds and knowledge necessary to process these documents. Over a short period of time, we handled approximately 7,600 exception documents.

With our help, NSF successfully transitioned to the eOPF in May 2010.



**U.S. Coast Guard.** YRCI provides OPF maintenance and cleanup support to USCG, inclusive of their OPFs, eOPFs, and Employee Performance Files (EPFs). Our federal OPF reviewers verify the accuracy of tenure group and veterans preference, and recalculate service computation dates for leave, reduction-in-force, thrift savings plan, and retirement, including obtaining creditable prior service through the National Personnel Records Center, or an individual's prior federal agency, along with appropriate Military Personnel Records, as needed.

When required, we initiate requests to change incorrect information, verifying the existence of an EPF for each current employee, and verifying the last four ratings of record for a non-Senior Executive Service employee. Ratings must coincide with ratings held in the National Finance Center personnel/payroll database. If, and when, the appropriate documentation is not available in the OPF to verify the accuracy of all required elements, YRCI employees coordinate with USCG personnel to obtain the required documentation. YRCI's reviewers also provide advice and assistance on technical matters related to employee records.

### Procuring Our Services

YRCI offers a number of easy methods in order to procure our services:

- Our GSA schedule offers flexible terms and competitive rates for easy and cost-effective acquisitions: GSA Schedule 738X for HR and EEO Services (Contract No. GS-02F-0050N).
- We have Blanket Purchase Agreements (BPAs) with multiple agencies that you may be able to use.



HR Services