



## CAJON VALLEY SCHOOL DISTRICT DRAMATICALLY REDUCED TIME TO ONBOARD A NEW EMPLOYEE USING AN AUTOMATED WORKFLOW.

- Automated New Employee Orientation process is user-friendly and convenient.
- A single person at Cajon Valley created this sophisticated workflow with minimal assistance.
- The workflow generates key PDF documents such as a W-4 and I-9 and Confidentiality Agreements automatically.
- Unnecessary data entry, scanning, error correction and manual follow-ups have been eliminated saving time for both HR staff and the new employee.

**Customer Profile:** Cajon Valley Union School District in El Cajon, CA is proud of being “The best place to live, work, play and raise a family.” As a robust employer with hundreds of new staff and teachers joining them each year, they are implementing a frevvo workflow to streamline their employee onboarding process.

**Business Situation:** Cajon Valley’s goal was to streamline the Employee Orientation. Onboarding a new employee was a lengthy process for both the new employee and the Personnel Department, involving hard copy forms, data entry, scanning and processing.

**Solution Summary:** Cajon Valley used **frevvo** LiveForms to design a sophisticated employee onboarding workflow that allows the Personnel Assistant to kick-off a set of ADA-Accessible web forms customized based on the new employee’s position. The workflow then sends a personalized email to the new employee with a link to complete employment, tax and payroll information in a simple digital format. The workflow includes PDF Mapping to I-9 and W-4 forms and a personalized, branded and professional Confidentiality Agreement that can be digitally signed.

With the help of frevvo workflows that employees can fill out at home or on their personal devices, the orientation is faster and easier than ever. Additional time is saved in the Personnel Department as data entry, scanning, correcting errors and follow-ups on incomplete forms have been eliminated using **frevvo** LiveForms automation.

“We are excited that new employees can use tablets or mobile devices to complete their forms, especially for uploading a file by taking a photo of it with their camera. Signatures are easy, the look and feel is very nice on a tablet, and all forms are ADA accessible.”

**Kyle Bullis,**  
**Systems Analyst / Programmer**



Many companies find that there are certain forms that must be in hard copy, for example, a form that must be signed by a physician. Cajon Valley tackled this by sending a separate email to the new employee with the Physician's Certificate filled in, so they can easily print or forward it to their physician for a signature.

Finally, the workflow posts data to the company's personnel database and payroll systems and saves PDF forms to their document management system. Data is automatically uploaded to their staff management portal where the new employee can access their personal information.

#### *Key Features:*

- Customized email notifications.
- Dynamic workflow routing that allows steps to be skipped if necessary.
- SQL Database Integration using a simple connector to eliminate scanning and data entry.
- PDF Mapping to complete IRS forms with ease.
- Automatic mobile view which includes uploading a picture or file.
- ADA Accessibility.

While frevvo provides customers with world-class training, services and support, Cajon Valley found **frevvo** LiveForms so intuitive that a single person was able to build this multifaceted workflow with minimal assistance. The staff are excited about the time-saving and ease of this frevvo workflow.

#### *Benefits:*

- Automated processes dramatically increase efficiency and reduce paperwork and wasted time. Employees can direct the saved time toward more important tasks – teaching and learning.
- frevvo's software is visual and easy to use and doesn't require programming.
- Mobile-ready forms look great and are easy to use.
- Integration with business systems reduces manual data entry and unnecessary errors.

Cajon Valley expects to build additional workflows that read and write to their database for forms like tuberculosis vouchers and exit surveys.