kleeto

PoJMS MODULE

HR OPERATIONS · DOCUMENT COLLECTION

Post-Joining Document Management

Closing the document gap after joining — employees upload missing documents, HR approves it, and the file completes itself inside the Kleeto DMS.

Objective: automate document compliance after joining — so the remaining mandatory documents are identified, requested, uploaded, reviewed and filed without HR running a manual collection drive.

The Challenge

- **Onboarding never finishes.** Joining formalities close, but several mandatory documents are still outstanding.
- **Manual chasing.** HR tracked pending documents on spreadsheets and followed up employee by employee.
- **Scattered submissions.** Documents arrived over email or hard copy, then had to be renamed, sorted and filed by hand.
- **No review gate.** Submitted documents not checked thoroughly. Incorrect documents land

The Kleeto Approach

PoJMS reads the compliance rules already defined in the Kleeto DMS and red flags incomplete employee files.

Active employees receive **portal credentials and a link by email** and upload the missing documents themselves — no collection work for HR.

Every submission runs through a **maker-checker** gate: the employee submits, the HR SPOC reviews, and only approved documents move into the employee file.

The Collection Process, End to End

01
Identify the Gap
Files falling short of the defined mandatory documents are flagged in the DMS.

02
Invite the Employee
Portal credentials and an upload link are emailed to each employee concerned.

03
Employee Uploads
The employee submits the missing documents on the PoJMS portal.

04
HR SPOC Approves
The checker is notified, reviews the upload, and approved documents move into the DMS.

PoJMS works across two phases

The same collection engine, triggered at different moments.

PHASE A · EMPLOYEE ONBOARDING

Immediately after joining, PoJMS tracks and collects the mandatory documents still outstanding — removing a manual task from the HR team at the busiest moment.

PHASE B · DOCUMENT INVENTORY IN THE DMS

For existing employees, HR runs periodic collection drives against the compliance criteria, and employees upload directly instead of HR retrieving files.

Core Capabilities

Self-Service Upload

Employees submit their own pending documents.

- Credentials sent by email Direct upload link

Maker-Checker Control

Nothing reaches the file without review.

- Employee submits as maker HR SPOC reviews as checker Approved files

Periodic Collection

Run drives whenever the inventory falls short.

- Driven by DMS compliance
- Repeatable across the base
- Email alerts at each stage

Who Does What

Employee — Maker

Logs in to the PoJMS portal with emailed credentials and uploads the documents listed as missing.

HR SPOC — Checker

Is notified of each submission, reviews it, and approves or sends it back before it is filed.

Kleeto System

Flags incomplete files, issues credentials and alerts, and files approved documents into the DMS.

How PoJMS Removes the Manual Work

WHAT PoJMS DOES	HOW IT WORKS	WHAT HR GAINS
Automated identification	Compliance rules already set in the DMS flag every incomplete employee file	HR never builds a chase list by hand
Secure self-service upload	Employees receive portal credentials and a link, then submit documents themselves	Documents arrive without manual follow-up
Reviewed before filing	The HR SPOC approves each submission before it moves into the employee file	Only verified documents move to the file

The Result

Document collection stops being an HR task and becomes a process. Gaps are identified from the compliance rules, employees close them on the portal, the HR SPOC approves, and the file completes itself in the DMS — cutting manual HR operations and keeping the organization audit-ready.

- ✓ **No manual chasing**
- ✓ **No physical retrieval**
- ✓ **Verified before filing**
- ✓ **Audit-ready inventory**