

ETCETERA® EPM & ECM Applications

OPTIMIZE INTERNAL PROCESSES WHILE ACHIEVING REGULATORY COMPLIANCE

SAMPLE DEPARTMENTAL SOLUTIONS

Accounting – Accounts Payable

Check Request
Request for Travel Advance
T&E Expense Report
Customer Refund Request
Returned Goods – Debit Memo Request
Request Change in Invoice Account Coding
Request for Expedited Payment
Request to Delay a Payment
Distributed Vendor Invoice Entry with Invoice Submission
Request for Vendor Invoice Copy
Request for Check Copy
Request for T&E Expense Report for Customer Reimbursed Expenses
Request for Vendor ID
Request Invoices for State Use Tax Audit
Request Invoices for External Auditors
Lost/stolen Credit Card Notification
Lost/stolen PCard Notification
Electronic Funds Transfer (EFT) Authorization
Request for a Domestic Wire Transfer
Request for an International Wire Transfer
W-9 Receipt Acknowledgement
W-8BEN Receipt Acknowledgement
Request for Lodging Exception
Mileage Log
Currency Conversion Calculator

Accounting – Payroll

Time Entry – Exempt Employee
Time Entry – Non Exempt Employee
Request for Vacation Time-Off
Request for Maternity/Paternity Leave
Request for Court Leave
Request for Leave Without Pay
Request for Military Leave
Request for Administrative Leave
Request for Sick Leave Pool Hours
Return to Work Status
Request for Attendance Summary
Request for Bereavement Leave
Request Copy of W-2
Request Review of Pay Stub
Departmental Payroll Voucher
Authorization to Work and Pay Differential
Shift Differential Pay Request and Authorization
Overtime Request and Authorization
Federal Withholding Change
State Withholding Change
Benefits Change
Beneficiary Change
Bonus Pay Authorization
Savings Payroll Deduction
Request for Self Pay Coverage
401K Enrollment
401K Change
US Savings Bond Payroll Authorization
Authorization for Direct Deposit
Flexible Spending Account Enrollment
Flexible Spending Account Waiver
Flexible Spending Claim
Authorize Release of Information
Check Cancellation and Replacement Request
Employee Change of Home Address
Tuition Assistance Reimbursement

Human Resources

I-9 Employment Eligibility Verification
W-4
W-2 Replacement Request
Application
Appreciation Recognition Authorization
Performance Review
Candidate Evaluation Form
Confidentiality Agreement
Code of Ethics
Use of Company Assets Acknowledgement
Counseling Record for Disciplinary Action
Discipline Warning
Disability Accommodation Request
Exit Interview
Employee Handbook Acknowledgement of Receipt
Checklist – New Employee
Checklist – Direct Hire Temporary Employee
Checklist – Transferring Employee
Family and Medical Leave Notice
Health and Safety Review
Hiring Process
Telephone Interview/Phone Screen
Interview - Required Information
Internal Job Application
Job Candidate Evaluation
Job Offer
Reference Check
Performance Development Plan
Personnel File Access Request
Progressive Discipline Warning
Request to Initiate Layoff
Shared Leave – Request to Donate
Shared Leave – Request to Receive
Request to Place Help Wanted Ad
Request to Hire Placement Agency
Incident Report
Termination Checklist

EXAMPLES OF SOLUTIONS SPANNING INDUSTRIES

Accounting/Finance

Accounts Payable (See Detail Opportunities)
Accounts Receivable
Payroll / Time & Attendance (See Detail Opportunities)
Treasury
Budgeting
Forecasting
Reporting
Shared Services Environments
Distributed Service Environments

Administration

Board of Director Minutes
Corporate Records
Policies & Procedures
Legal
Mergers & Acquisitions

Credit and Collections

Credit Files
Credit Scoring & Authorization
Billback Management
Claims Management
Tax Exemption Management

Facilities Management

Equipment Maintenance
Request for Service
Work Order Management
Contractor Management
Request for Proposals

Human Resources

Employee Records (See Detail Opportunities)
Insurance
HR Surveys
HR Vendor Management
Incident / Accident Reporting
Workers Compensation Management
Awards & Recognitions

Human Resources (continued)

Employee Training
Employee Termination
New Hire Management

Information Technology

Move/Add/Change Work Order Management
IT Capital Requests / Management
IT Training Programs
Information Security
Account and Access Management
Desktop Management
Project Management
Web Master – Content Management

Marketing

Marketing Requests
Travel Show Management
Advertising
Contractor Management
Program Management

Purchasing

Purchase Requisitions
Vendor Approval Processes
Contract Management
Purchase Management
RFP Management

Quality Assurance

Quality Control
Failure Testing
Quality Improvement Plans
Inspection Processes
Test Plans

Sales & Sales Support

Order Management
Sales Management
Proposal Reviews & Approvals

EXAMPLES OF SOLUTIONS FOR INDUSTRY SPECIFIC DEPARTMENTS OR PROCESSES

Banking

Deposit Operations & Item Processing
Mortgages and Loans
Customer Records
Safety Deposit Box Management
Lockbox Operations
Trust Department
Compliance and Risk Management
Account Management & eSignature Cards

Communications

Order Processing
Work Order Management
Customer Files
Advertising / Sales / Contract Management
Warranty Services
Customer Support

Distribution

Billback Management / Debit Management
Price Protection Requests
Claims Management
Returns Management
Return Authorizations
Fleet Maintenance Records
Driver Records

Engineering & Construction

Job File Management
Materials and Purchasing
Equipment Maintenance and Repair
Managing ECNs
Contract Management
Permit Management
Mobile Workforce Enablement
Site Inspections
Safety Management

Financial Services

Customer Files
Stock Transfer Authorizations
Asset Management
Portfolio Management
Real Estate Management
Affinity Program Dealer / Broker Management
Credit Markets and Money Markets
Municipal Securities Management
Risk Management
Investigations

Government

Licensing, Permits and Registration
Agency Work Processes
Student Records Management
Customer Support
Work Orders
Maintenance Services
Vehicle/Fleet Management Records
Federal/State/Municipality Work Processes
Public Administration
Pension Management

Healthcare

Medical Records
Laboratory and Accessioning
Radiology Records
Pharmacy Records
Blood and Organ Data Management
Patient Financial Services
Communication (Patients, Payers, Others)
Credentialing
Transportation Management (In house)
Patient Registration/Intake
Free Care Management

Healthcare (continued)

Emergency Department
RAC Audits
Audit Preparation
PPD Management
Patient Surveys
Professional Development
Real Estate Management
Contributions Management

Insurance

Underwriting
Claims Management
Reinsurance
Agency/Broker Management
Policy Services

Life Sciences

Product Lifecycle
Chemistry/Bio Data Management
Clinical Investigators
Clinical Trials / Subject Enrollment
Patient Data

Manufacturing

Product Development / Engineering
Engineering Change Notice
Materials Requirements
Supply Chain
Production Management
Quality Control
Equipment Maintenance
Managing RFQs
Warranty
Safety Programs
Equipment Maintenance
Waste Disposal

Not-for-Profit

Membership
Grant Management
Donor Management
Client Record Management

Professional Services

Client Services Management
Project Management
Contract Management
Order Management

Retail

Chargeback Management
Contract Management
Real Estate Management
Advertising Management
Merchandising

Tourism, Hospitality & Leisure

Tour Management
Sales & Marketing
Contract Management

Transportation

Fleet Maintenance/Management
Driver Records Management
Delivery Services



Corporate Office
201 Boston Post Road West
Suite 102
Marlborough, MA 01752
(978) 218-5000
www.sceris.com