



# The Essential Guide to Human Resources Automation Now and for the Future

*How to determine when you should Digitally Transform your HR Department*



# Table of Contents

1. A Shifting Landscape
2. Unique Challenges
3. Key Signs
4. The Foundation for  
HR Automation of the Future
5. Benefits to Your Organization
6. Success Stories
7. Get in Touch



# A Shifting Landscape



Recently, the world saw a massive shift in how companies operate. With many businesses moving to remote and hybrid workplaces, much of the burden of adapting to these changes is being placed on Human Resources departments. There has also been record-breaking turnover across nearly every industry as burnt-out employees began to seek greener pastures. This mass exodus from the workforce peaked in March 2022, with 4.53 million employees resigning from their jobs. The mass resignation gave workers more power over their employment choices than seen in decades, and Human Resources departments were once again forced to adjust to a massive shift in their workplaces and were tasked with creating new initiatives to attract, train, and maintain talent.

This drastic change in the global work environment demanded that Human Resources departments transform the way they work by creating new training and hiring initiatives, finding ways to preserve company culture, and finding new means to attract talent.



*A survey from Owl Labs revealed that **70% of workers remained remote through the pandemic, completely changing business norms.** Furthermore, according to that same survey, **80% of employees now expect a hybrid work environment.***

# Unique Challenges

*HR departments will need to lean on technology in order to support organizational growth.*



## 1. Time-Consuming Hiring Practices

HR is often faced with lengthy and confusing piles of paperwork. The onboarding process requires the collection of repetitive information that is time-consuming to manage. This process can cause delays in start dates and poor retention rates and, if not completed correctly, can also incur penalties and fines. Worse yet, these manual, mundane tasks take time away from other, more engaging onboarding initiatives.

According to Zippia Research, organizations with a strong onboarding process **improve retention by 82% and productivity by 70%**.

Top human resources researchers suggest that paperwork should only be a small part of the onboarding process, and yet these same researchers find that about 58% of organizations' onboarding processes primarily involve paperwork. With how much just this paperwork alone entails, it's no surprise.

### Most onboarding packages include:

- ▶ Employment contracts
- ▶ W-4 forms for taxes
- ▶ I-9 forms for employment authorization
- ▶ Background authorization forms
- ▶ Payroll information sheets
- ▶ Direct deposit authorization forms
- ▶ Benefits election/waiver forms
- ▶ Employee handbook contracts

## 2. Managing Documents in a Distributed Work Force

With a shift toward remote work and companies expanding their hiring geography to attract talent, workforces are more distributed than ever. As a result, human resources departments must find ways to collect documents from those employees not in the office and securely share information with other employees.



### 3. Difficulty Protecting Sensitive Employee Information

While much of the information HR works with must be disclosed to the entire company, such as interoffice communications, policy updates, and form submission reminders, your business is also responsible for a large amount of personal identifiable information about employees that must be safeguarded.

Personal Identifiable Information (PII) in Human Resources:

- ✓ Tax Information
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Copies of State Identification
- ✓ Full Name



PII in and of itself can pose a unique security challenge. It must often be shared with external agencies such as banks and the IRS while keeping it secure. In addition to PII, best practices for Human Resources departments often suggest keeping certain employee records confidential, including disciplinary records, performance reviews, workplace injury reports, and background checks. Add to this challenge the need to maintain HIPAA-protected employee health records for company insurance plans, and it becomes even more evident why HR security is so crucial.

### 4. Maintaining Compliance with Government Regulations

The U.S. Federal Department of Labor regularly audits Human Resources departments for several documents, including:

- ✓ W-4 forms to check employee tax information
- ✓ Recruitment /hiring records and interview notes to ward off hiring discrimination
- ✓ I-9 forms to ensure employment eligibility in the United States
- ✓ W-9 forms to ensure businesses who pay a vendor or contractor \$600 or more during a tax year are compliant

These forms and documents for any specific employee can be requested during an audit. Locating them in larger file cabinets or on employee computers can waste hours of employee time or worse, if lost or misplaced, can result in steep fines for failing to produce the documents. Companies can incur a \$2332.00 fine for failing to produce an I-9. If your business uses outside contractors, you must collect federally mandated documents for tax reporting purposes, including Form W-9 and could face a \$50 penalty for EACH instance in which Form W-9 is not filled out or available during an audit.

# Key Signs

*Signals it's time to automate*



When and how to update your Human Resources processes can be daunting, but there are some key signs that may indicate it's time to look for a new solution.



If your Human Resources department struggles to maintain the quality of core functions such as payroll or benefits management, it is a clear sign that you are stretched too thin. Automating basic, everyday tasks alleviates overtime hours, keeping your human resources team happy and reducing labor costs.



If there's more employee information and paperwork to manage than your current HR workforce can handle and important tasks are delayed, you should look to move to an automated solution. Even during a workload spike, such as a large onboarding, investing in an automated solution can alleviate much of the burden.



If operational costs such as storage, printing, mailing, and paper are increasing beyond your planned budget, automation can contain costs, bring them under control, and most often reduce them dramatically.



If your organization has moved to a hybrid or remote workforce and you are experiencing bottlenecks in collecting information, automation can create seamless processing and allocation of documents so employees can work efficiently and productively wherever they are.



## What is HR Automation?

Human resources automation uses software to automate the more repetitive, monotonous, and time-consuming common tasks that a Human Resources department may face. Automation may even encourage employees self-serve by offering convenient ways to submit information. And with so many new responsibilities placed on HR departments, it makes sense that automation is on the rise. According to Grandview Research, the human resources market is expected to grow by 12.2% by 2028, and in 2020, HR software solutions dominated revenue shares at 33%. Given the current business environment and the affordability of automation software, investing in a digital transformation for your Human Resources department has never made more sense than now. Plus, with prebuilt, template web forms available, organizations can minimize the effort to get started with automation and speed the time to implementation, ensuring they are using best practices. This makes automation even easier and facilitates rapid adoption.



# The Foundation for HR Automation of the Future

## 1. Enterprise Content Management (ECM)

ECM solutions provide a secure, centralized, and quickly accessible location for your HR documents. By indexing key information as a document enters the system, it can be called upon using any number of fields. This quick and easy access to information can save a tremendous amount of paid employee hours and help with audits, ensuring that the requested documents are submitted on time.

ECM solutions help automate document retention schedules by setting rules for how files are stored and when they should be destroyed, saving digital space with no need to remember to complete these common tasks.

Cloud ECM solutions are secure, can encrypt and separately silo data, and be SOC 1 and 2 compliant, ensuring best practices are followed to keep your data safe. ECM systems should easily integrate with an organization's core technologies, including human resources information systems (HRIS) to ensure a seamless flow of information. Integrations allow users to easily search, retrieve and work with information within one application, saving time and reducing training.

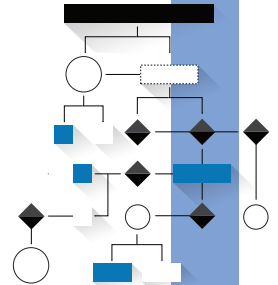
## 2. Document Capture

The key to automating document-based processes is making the information on those documents actionable. With a capture automation solution, you'll be able to easily capture, classify, and validate high volumes of documents, including paper, PDFs, and even email messages and their attachments. Many solutions are scalable, so you can start small and grow as you need. For those companies managing a lower volume of documents an easy-to-learn point and click indexing option is available. For organizations with higher volumes, a template or AI capture solution would be the right choice. By using the power of document capture, you can feed your enterprise content management system and enable end-to-end HR process automation.



### 3. Workflow Automation

Because documents often travel across the office and are passed off from person to person, they can be lost or forgotten. By implementing automated, structured workflows, you can ensure that your HR tasks are completed in a timely, structured manner. A graphic interface makes it easy to outline and structure how workflows and documents can be routed through their life cycle. The status of these workflows is visible to management using an intuitive dashboard and allows them to see where documents are stalled so that the workflow can be adjusted accordingly. Workflow automation adds structure and efficiency to several HR-related activities, including setting benefits enrollment deadlines and creating performance evaluation reminders.



### 4. Web Forms

Web forms allow you to begin your document-related processes completely digital, streamlining how they are completed and submitted. Available from any web browser, web forms are easily accessible and eliminate the need for downloads and installations. Complex onboarding documents such as I-9 and W-4 forms can be simplified with workflow-driven forms that ask questions relevant to the user. They also eliminate repetitive data entry as advanced web forms retain the information from the previous form fills for auto-population. Other features like drop-down lists, default values, translatable fields, and field-specific instructions ensure data is complete and accurate.



# Automation!



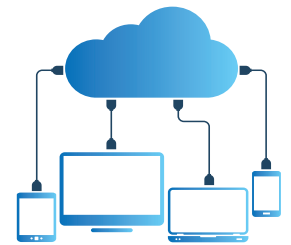
# Benefits to Your Organization

## Simplify Onboarding

Complex onboarding forms like I-9s and W-4s can be completely painless with document automation. Employees can be linked to a set of standard, prebuilt onboarding forms that can be customized and expanded upon for each organization. These complex forms can guide users through only the relevant questions and automatically calculate numeric fields. They also eliminate repetitive entries by remembering inputs from previous forms and automatically populating them onto the document. Document workflows can route the completed forms to a manager or HR representative for final approval. The new hire can then be entered onto the payroll in less time, so they are onboarded more quickly and ready to start contributing to your organization.

## Make Information Easily Accessible

Since information is indexed and archived digitally, it is searchable through various fields. You can even search by multiple fields to further narrow your search results. This can save a tremendous amount of time. According to Gartner, professionals spend 50% of their time searching for information and, on average, take 18 minutes to locate each document. The speed at which you can find information is critical during HR audits when I-9, W-4, and other employment and hiring documents are requested from the U.S. Department of Labor (DOL), the Internal Revenue Service (IRS), and Immigration and Customs Enforcement (ICE).



## Reduce Cost

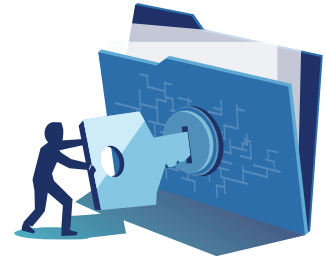
According to The ECM Consultant, The average business' need for paper storage doubles every three years, and many businesses resort to using basements, attics, or other weather-vulnerable spaces for their files. This abundance of filing cabinets also takes up office space that could be used to expand your business in more meaningful ways. After all, just one filing cabinet can take up 16 square feet of space. To find out how much paper storage space is costing you, simply multiply those 16 feet by the number of filing cabinets and the cost of a square foot of office space in your area. You could be saving thousands of dollars per month.

## Maintain Security and Compliance

Account and permission-based access to documents ensure that workers have access to only the information they need to do their job. Cloud solutions that are SOC 1, 2, and HIPAA compliant also follow best practices to keep user information safe. For example, encrypted data in storage and transit wards against unauthorized access, and separately siloed data ensures that one person's actions don't impact many.

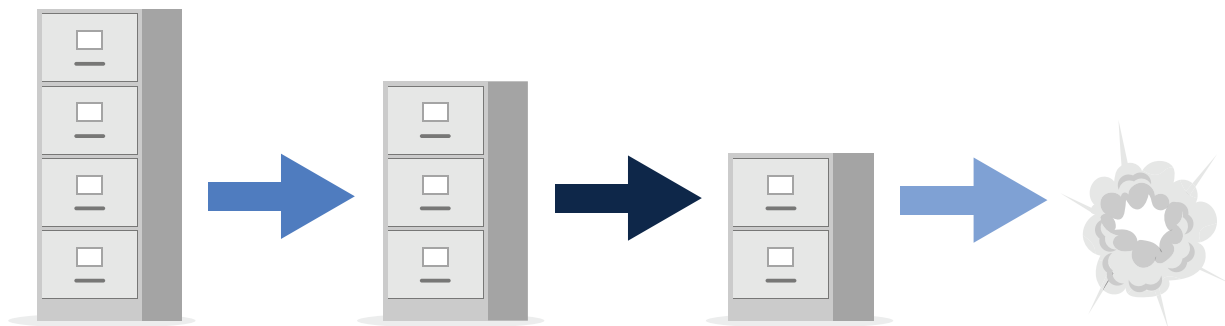
## Encourage Self Service

With intuitive web forms, employees can be better equipped to help themselves when filling out complex documents. They can simply click open any web browser, and the web form will guide them through the process to address their needs. Workflow can then route these forms to the appropriate person, where they can take action on it in any number of ways.



## Gain Insights into Operations

With remote and hybrid work becoming commonplace, many companies have resorted to email attachments and disorganized shared drives to provide employees with business-critical documents. These workarounds often lead to lost and misplaced documents and confusion about which is the current version. Cloud ECM solutions provide an organized, centralized, and easily accessible location for HR documents where they can be painlessly referenced by any employee with permission to access them.



# Success Stories



## WoodSpring Hotels Property Management

WoodSpring Hotels manages 116 hotels throughout the country and continues to experience significant growth as a top extended stay option. However, manually processing the paperwork of thousands of hotel staff members was time-consuming, and error prone, and required an immense amount of follow up. By centralizing the location of all of WoodSpring's documents, staff who had previously spent 5-10 minutes retrieving files, now spent only 5-10 seconds, cutting time by 6,000%! WoodSpring also implemented an HR onboarding solution, using web forms to guide new hires through complex forms like W-4s and I-9s.



GlobalSearch has provided us with an easier way to process paperwork, especially when the company is growing at such a fast pace. I'd say we're saving about 25% of our time, maybe more.

**Nanda DeRoulet**, HRIS Manager  
WoodSpring Hotels Property Management



## Kenny Family Shoprites

The Kenny Family Shoprites delivers an extensive mix of products, specialty options, and innovative services throughout the Northeast services. With strict document retention policies calling for the Shoprite of Delaware to preserve all Human Resources documents, Kenny Family Shoprites quickly accumulated a cumbersome buildup of paper and lost valuable paid employee hours to filling out and filing documents.

By using digital transformation tools like enterprise content management and web forms, the Kenny Family Shoprites were able to eliminate paper in their HR departments almost entirely. The franchise has simplified the completion of their onboarding packets with workflow-driven web forms reducing costs associated with the storage and man-hours of managing those records.



For us, it's about saving time so we can focus on our customers better and our Human Resources employees can concentrate on their departmental duties rather than wasting time searching for documents.

**Ben Simons**, IT Manager  
Kenny Family Shoprites





## Find out why HR Departments are turning to Square 9 for their digital transformation needs.



At Square 9, we offer an award-winning platform of solutions for assisting businesses of any size to be more efficient and compliant. With a customer renewal rate of over 96%, Square 9 is the company that businesses have come to rely on. Our customers and their success are important to us, so we offer free e-learning to all active customers ensuring they get the most out of their document management solutions. Visit [Square 9](#) to get a no obligation discovery session and see how automating your Human Resources department can improve your onboarding and retention rates.

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