Your Essential Guide to Human Resources Automation

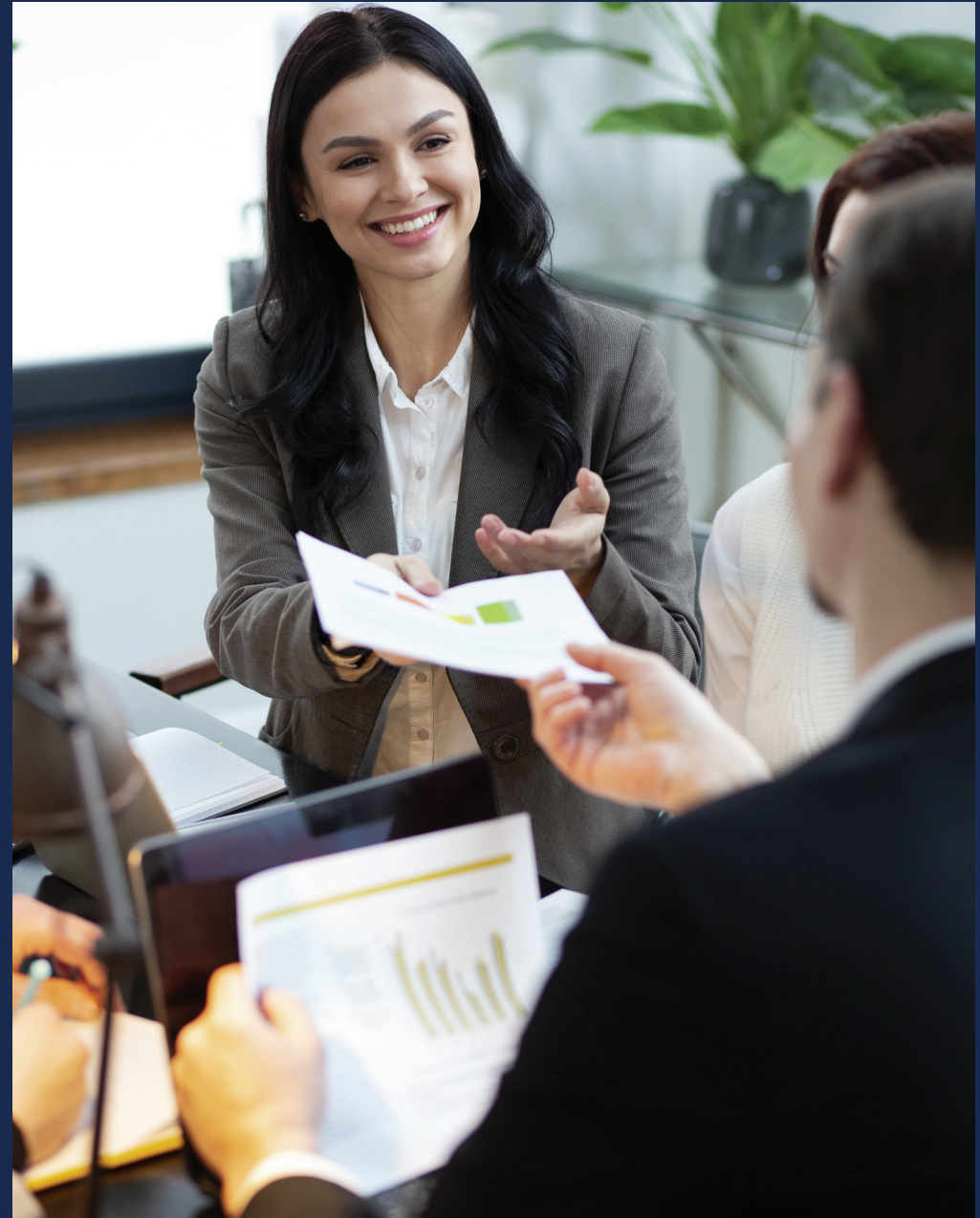How to Do More with Less
Amidst Rising Responsibilities

What to Expect from This Guide

This guide provides a broad but detailed overview of Human Resources automation. It showcases how human resources departments can ensure information security and compliance, enhance information visibility, and free up time for crucial new responsibilities as the role of human resources departments continues to evolve. It also gives vital insights into the right time to consider human resources automation and for choosing a solution that will meet the unique needs of your department. Dive in to discover what's needed for your HR automation journey!

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The State of Human Resources

A Shifting Landscape

The role of human resources departments continues to grow and evolve as organizations tackle new and unique challenges, including:

- ☑ Maintaining productivity, communication, and culture in remote and hybrid environments

- ☑ Keeping up with continually developing compliance and privacy standards

- ☑ Increasing diversity and inclusion efforts

- ☑ Adapting to the values of a new generation of professional workers

However, despite these new responsibilities, the average organization has a disproportionately low number of human resources professionals to tackle these important efforts.

Human resources professionals make up only 2% of the average U.S. business, with half of all HR departments remaining the same size in 2024 (Lattice). What's more, HR growth stagnates at 2.3% of the workforce as organizations scale beyond 5,000 employees. (AIHR)

This leaves human resources departments needing to heavily streamline and automate their regular tasks to do more with less.

What is Human Resources Automation?

Human resources automation uses software involving workflow automation, intelligent information management (IIM), and other business technologies to help organizations complete tasks more efficiently, improve business processes, and do more with fewer resources. This often involves streamlining access to vital information, ensuring adherence to regulations and best practices, and reducing the number of human touchpoints in monotonous, highly repeatable tasks.

Processes that benefit from human resources automation include:

- ☑ Talent Acquisition
- ☑ Onboarding and Offboarding
- ☑ Performance Management
- ☑ Compensation Management and Benefits Administration
- ☑ Human Resources Analytics
- ☑ Regulatory Compliance

Unique Challenges Facing Human Resources Departments

Managing the Completion of Onboarding Packages

The employee onboarding process involves lengthy, confusing forms that are time-consuming to complete and frequently lead to follow-up questions from new hires. Human resources departments also often need more visibility into when these forms are completed, leading to bottlenecks in the collection and archival of these forms.

Most onboarding packages include, at the very least:

- Employment contracts

- W-4 forms for taxes

- I-9 forms for employment authorization

- Background authorization forms

- Employee information sheets

- Payroll information sheets

- Direct deposit authorization forms

- Benefits election/waiver forms

- Employee handbook acknowledgment contracts

- Timesheets

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

Top human resources researchers suggest that forms and documentation should only be a small part of the onboarding process. Yet these same researchers found that about 58% of organizations' onboarding processes primarily involve forms and documentation – and with the time it takes to complete even the essential documents, it's no surprise.

Unique Challenges Facing Human Resources Departments

Protecting Sensitive Employee Information

Human resources departments have a unique set of privacy concerns. While much of the information they work with must be disclosed to the entire company, such as interoffice communications, policy updates, and form submission reminders, HR departments also have a large amount of personally identifiable information (PII) about employees that must be safeguarded.

Personal Identifiable Information (PII) In Human Resources:

- Tax Information

- Social Security Number

- Copies of State Identification

- Full Name

- Date of Birth

In addition, best practices for Human resources departments 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 highly evident why human resources privacy compliance is so crucial.

Unique Challenges Facing Human Resources Departments

Complying with Regulations and Audits

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

- W-4 forms to check employee tax information
- 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

Forms and documents for any specific employee can be requested during an audit. With mandated retention rates and enough employees' worth of documents, fulfilling these requests can take days of labor without a proper system in place. Failing to find these records has worse consequences, with potential fines, such as a maximum $2,332.00 fine for failing to produce an I-9.

In addition, records such as hiring notes and performance reviews must be retained in case of potential legal disputes. Failing to do so can result in a lost case, with compensation payments ranging greatly depending on the nature and perceived severity of the case.

Managing Information in a Distributed Workforce?

With a global shift towards hybrid work and companies expanding their hiring ranges to attract talent, workforces are more distributed than ever. In fact, according to Forbes, 12.7% of full-time employees work fully remotely, while 28.2% work in a hybrid model for a total of 40.9% of full-time employees working in a distributed workforce. As a result, human resources departments must find ways to remotely collect employee documents and securely share information with other employees.

Signals It's Time to Automate

Scaling your business ultimately comes with growing pains. HR automation can help ease this transition, but it's important to know the signs that it's time to automate.

If your current information archival method risks compromising sensitive employee data, an HR automation solution can help you maintain this information securely and compliantly.

If processes such as employee onboarding and offboarding, credential reminders, and audit preparations become time-consuming drains on productivity, automating these tasks may free up space for value-driving activities.

If the costs of performing key HR functions begin to escalate, HR automation can help control those costs and help your team scale with the resources they already have.

3 Considerations for Finding The Right Human Resources Solution

To ensure your organization can meet the specific challenges human resources departments face, look for a solution that:

1 Is Highly Secure

Personally identifiable information must be protected by law and is present on many HR documents. This makes securing these records from both internal and external breaches essential. To ensure your organization can secure this data, look for solutions with the following:

☑ **Account-Based Access Permissions:** to limit information access to those who need it.

☑ **Encryption at Rest and in Transit:** for safe housing and transmission of data in cloud environments.

☑ **Privacy Compliance Certifications:** such as SOC and HIPAA compliance, show the provider has implemented security best practices.

☑ **Audit Trails:** allow your organization to track changes, access records, and investigate potential breaches.

2 Has the Right Tools to Automate Your Processes

Human resources departments have a unique set of automation challenges stemming from repetitive, time-consuming processes like onboarding, off-boarding, company reminders, and audits. Solutions that can meet these challenges should include:

☑ **Flexible Workflow Automation:** that works with your organization's processes for credential reminders, onboarding documentation approval, record retention scheduling, and more.

☑ **Workflow-Based Web Forms:** that can simplify the onboarding process by effortlessly guiding users through complex forms.

☑ **A Searchable Archive:** to quickly and easily find the information your staff needs to complete their regular tasks.

3 Considerations for Finding The Right Human Resources Solution

3 Has Options for Finding Information

Having options for how your organization can access information ensures it can be found effortlessly in all scenarios. Access options that are crucial to human resources include:

- ☑ **Index-Based Searching:** for records such as employment verification and tax forms to easily find these records for audits.

- ☑ **Full-Text Search:** for records such as hiring notes and employment contracts to locate specific information within in the event of litigation or e-discovery.

- ☑ **Version Control:** to ensure all staff are viewing the most up-to-date versions of each document.

Turning Challenges into Opportunities with HR Automation

Simplify Onboarding

Workflow-driven web forms can guide new hires through each question on their onboarding forms and route the completed documents for approval and archival into a searchable ECM system. This reduces strain on human resources staff as new hires can complete these forms more independently. It also grants HR staff more visibility into when forms are completed, eliminating the need for follow-ups and allowing new hires to hit the ground running.

Ensure Retention Compliance

By capturing indexing information from documents using web forms or OCR, records with mandated retention periods can be archived for fast and convenient retrieval at any point by an authorized account. This system transforms audits from a frantic ordeal into a simple and straightforward process.

Additional records, such as performance reviews and disciplinary notes, can also be captured using OCR and full-text searches during e-discovery to resolve legal disputes quickly.

Protect Employee Information

Using Enterprise Content Management (ECM), access to sensitive employee information can be tied to specific user accounts, ensuring that only those who need access have it. Combined with audit trails and security best practices like SOC compliance and encryption, your staff can rest assured that their information is being handled with care.

Manage Information Across Locations

By providing convenient access to human resources information while maintaining security and access best practices, your HR staff will be well-armed with the information they need to perform their regular tasks.

Make Time for Value Driving Activities

With the time saved from these automation tools, human resources staff can focus on big-picture efforts such as new talent acquisition strategies, retention incentives, company-culture adaptations, and more.

HR Automation in Action

WoodSpring Hotels Property Management

WoodSpring Hotels manages 116 hotels throughout the country and continues to experience significant growth as a top extended-stay option.

As a result of this growth, the company was beginning to experience challenges managing its human resources documents.

Challenge

For WoodSpring, manually processing the paperwork of thousands of hotel staff members was time-consuming and error-prone. In addition, it required an immense amount of follow-up and arduous document retrieval efforts to ensure the documents were accurate. With no signs of the paperwork slowing down, WoodSpring began searching for a solution.

Solution

By centralizing the location of all of WoodSpring's documents and offering advanced search capabilities, GlobalSearch significantly streamlined the company's access to business-critical documents. Staff had previously spent 5-10 minutes retrieving files, but with GlobalSearch, that time has dropped to only 5-10 seconds!

WoodSpring also implemented Square 9's HR onboarding solution, which uses web forms to automatically populate repetitive fields and 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

HR Automation in Action

Kenny Family Shoprites

The largest retailer-owned supermarket cooperative in the United States, more than 220 Shoprite stores are located throughout New York, Connecticut, Maryland, New Jersey, Pennsylvania, and Delaware.

The Kenny Family Shoprites, the premier supermarket retailer in Delaware, delivers an extensive mix of products, specialty options, and innovative services.

Challenge

With strict document retention policies calling for the Kenny Family Shoprites to preserve all human resources documents,

including employee write-ups, availability records, legal and payroll information, and 20-page new hire packets for each of 200 employees, Kenny Family Shoprites quickly faced storage and accessibility challenges for these records. These 20-page packets also took far too long to fill out and file away, wasting additional time and paid hours.

Solution

Using GlobalSearch and GlobalForms, the Kenny Family Shoprites were able to eliminate paper in their HR departments almost entirely. The franchise has stored over 30,000 documents in GlobalSearch and has simplified the completion of their onboarding packets with workflow-driven web forms. Once completed, the packets automatically route into GlobalSearch and index away, saving the franchise from 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.

User Adoption

Change is conflicting for most people, and it can be difficult for people who have worked one way for multiple decades to adopt a new approach. Despite this, there are a few key ways to help your human resources department embrace change and take advantage of the newfound benefits.

- ☑ **Feel Vested:** Involve them in the solution selection process. Hear their concerns and input and explain the factors that led to the final decision. This will help ease concerns about the suddenness of the change and show them that you are working with their best interests in mind.

- ☑ **Assign Someone to Manage the Transition:** A primary point of contact for any questions or concerns can help ensure a smooth transition and act as a liaison between your staff and your solution provider for additional assistance.

- ☑ **Provide Tools for Success:** Solution education, customer support, and self-help resources such as a knowledge base all ensure your solution kicks off without a hitch and your faculty and staff can hit the ground running.

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Square 9 and BlueIrisIQ

Why Square 9 is the Right HR Automation Solution

Square 9 is an industry trailblazer in the field of intelligent information management, taking the paper out of work and ensuring a productive, hindrance-free environment where information can flow freely. Easy to learn, highly supported, and backed by world-class service and extensive education. Square 9 solutions are designed to help you take your organization to the next level.

Square 9's HR Automation solutions are designed to ease onboarding, simplify employee requests, and provide secure, compliant access to all the information human resources professionals need to meet the challenges of their role.

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Choose BlueIrisIQ for Your Square 9 Integration

BlueIrisIQ—Konica Minolta's Intelligent Information Management (IIM) practice and Square 9's exclusive partner—takes the heavy lifting out of implementing and customizing the Square 9 platform. We handle everything from mapping and configuring workflows to aligning with your existing ERP, HRIS, and legal systems. The result? A seamless integration that empowers HR teams with tailored solutions and frees IT from complex implementation.

With deep expertise and a logic-first approach, we adapt Square 9 to your department's specific needs—whether you're enabling remote onboarding, tightening compliance, or streamlining operations across multiple locations—helping you deliver a more efficient, secure, and personal employee experience.

Join the many organizations that have transformed their HR processes with BlueIrisIQ's customized solutions.

Contact us today to get started: BlueIrisIQ.com