

**Digital HR & Automation:**

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# Take Your New Normal to a Higher Standard

**A Guide to Implementing a Holistic Automation  
Solution for your Post-Pandemic HR World**

**ONTASK**  
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# INTRODUCTION

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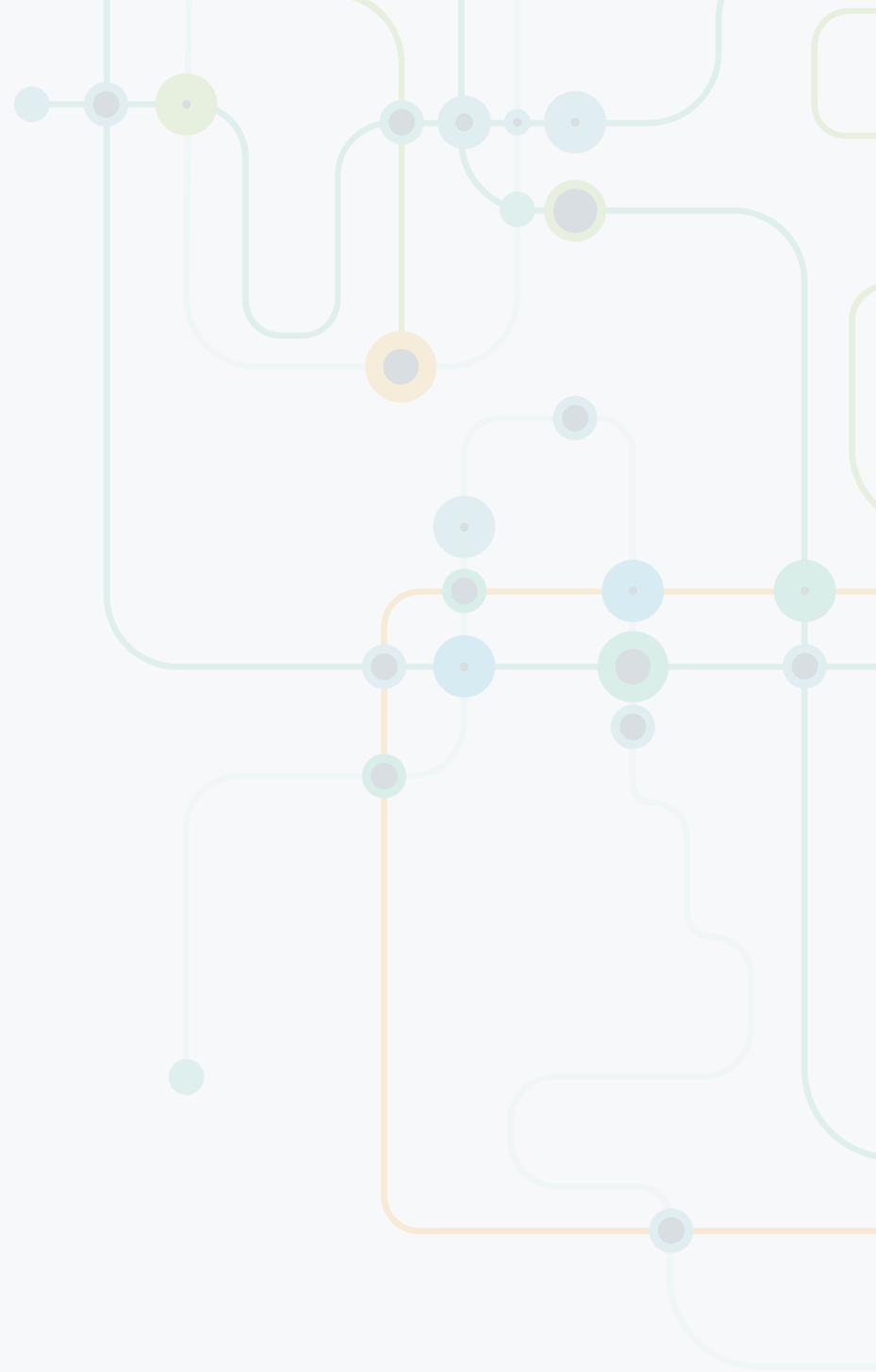
While going digital was growing in popularity before the pandemic, COVID-19 made this trend a necessity. The temporary shift to a remote workforce is now becoming permanent — once employees have experienced the comfort of working from their couch, they don't want to go back.

Similarly, the automation revolution in HR that has been happening over the past decade has become the new norm. Your employees expect digital, automated solutions throughout the employee lifecycle, from onboarding paperwork to performance reviews to exit interviews, and everything in-between.

Long gone are the days when people filled out a new employee form, scanned it, sent it to their boss to sign, the boss scanned it, the HR administrator signed it, and they scanned and uploaded it to the intranet. That sentence alone is headache-inducing — so is holding onto antiquated paper or email-based processes, and piecing together makeshift, piecemeal digital solutions that don't play nicely with each other.

With digital being the new normal, developing a long-term automation strategy is a necessity moving forward. HR influences every aspect of your organization, and nurturing the department with the right tools is essential.

Full-scale workflow automation enables your HR team to become a more strategic partner, focusing on people instead of paperwork and setting the entire organization up for long-term success.



## PART 1

# Take Your New Normal to a Higher Standard

## Automation

We know you've probably implemented some elements of automation here and there, especially because you've had to find digital solutions for your remote workforce. Maybe you digitized some key processes, like employee onboarding and offboarding due to the pandemic. That's a step in the right direction, but it's ultimately not sustainable for your organization's long-term success and growth.

Implementing a holistic HR workflow automation solution doesn't just digitize your existing processes. Instead, it completely transforms your organization.

## Workflow Automation: A Basic Definition

While you may have a basic understanding of workflow automation, either from reading about the "automation revolution" in HR or by implementing some automation tools, here's how we define it at OnTask:

**Workflow automation** is a way of taking a company's processes, defining the steps that are involved, and **setting up automated actions to make them structured and repeatable.** Workflow automation streamlines manual and paper-based processes to **increase productivity and efficiency in the workplace.**

Sounds simple enough, right? Workflow automation is a perfect fit for the processes and paperwork that HR manages on a daily basis.



## The Benefits of Automation

While the benefits of automation may seem obvious, it's essential to recognize them to understand just how important it is to implement a holistic automation solution. After all, with makeshift processes that are only somewhat automated, you don't get to reap the full benefits of truly automated workflows. In addition, it can be confusing for employees on what to expect.

### Here are the benefits of workflow automation:

#### Reduce

- Risk
- Frustration
- Duplicate efforts
- Errors
- Paperwork
- Manual processes
- Time and costs

#### Remove

- Process barriers and bottle necks

#### Increase

- Output
- Productivity
- Accountability

#### Identify

- Performance trends
- Process barriers and bottle-necks

#### Improve

- Compliance

While these benefits are more general, and apply to workflow automation in any industry or work environment, automation can make a huge impact in three specific areas that HR needs help with most:

1. Compliance and risk management
2. Employee lifecycle management
3. Employee engagement



## PART 2

# Build Risk Management and Compliance Into Your Processes With Workflow Automation

Reducing risk and meeting compliance standards is an essential part of what HR brings to every organization. With the shift to hybrid and digital workplaces comes complications regarding risk management and compliance. New processes are needed to protect sensitive information – all while making employees feel comfortable and secure. HR has to step up to the plate and ensure compliance regulations are being met across the organization, collaborating with IT and legal.

## HR's Essential Role in Compliance & Risk Management

One primary role of the HR team is mitigating risk and ensuring compliance in all employee matters, including hiring, payroll, risk and safety, benefits, employee relations, and termination. HR also ensures compliance in various non-HR requirements, such as workplace safety requirements, data security regulations, and other general areas of business compliance.

Here are some key compliance requirements that HR departments need to be aware of across different documents and forms, especially as paperwork gets digitized.

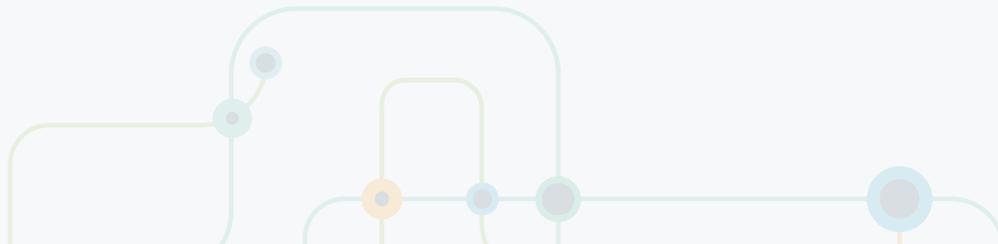
### HIPAA

Under the Health Insurance Portability and Accountability Act (HIPAA), authorized parties should be the only individuals with access to a patient's health records. This includes the patient, healthcare workers working with the patient, and individuals the patient specifically designates (such as family members). HIPAA compliance covers all businesses that deal with health information, such as dermatology clinics, general practices, radiology clinics, and healthcare data centers, to name a few.

### SOC 2

SOC 2 (System and Organization Controls) is an auditing procedure that ensures data is protected based on five principles — (1) security, (2) availability, (3) processing integrity, (4) confidentiality, and (5) privacy. Being SOC 2 compliant means that an organization keeps sensitive data private and secure while it's at rest or in transit.

Having these compliance standards built into your workflow automation solution means that achieving compliance and reduced risk will be an easy, automated part of your operations.



# How Workflow Automation Reduces Risk and Cultivates Compliance

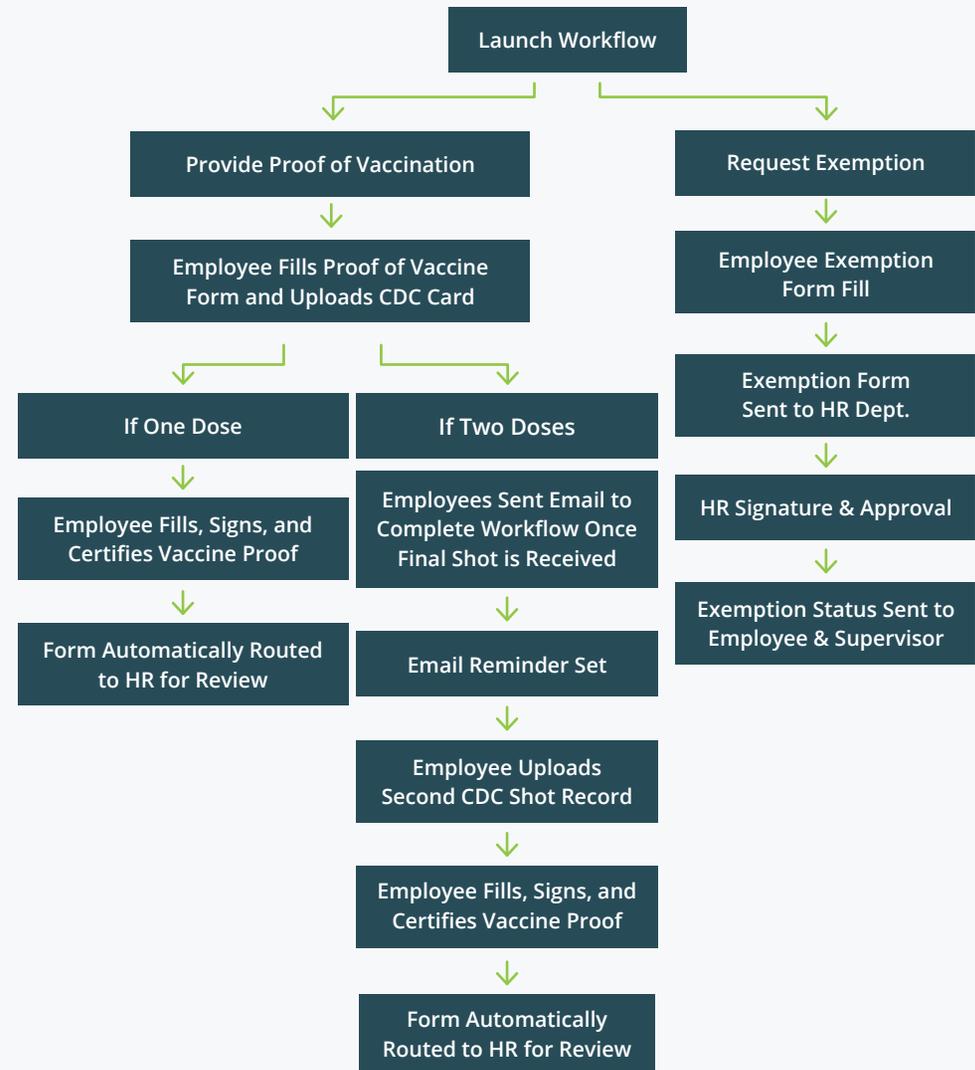
Digitizing HR paperwork and automating processes reduces risk and cultivates compliance in a number of ways.

## Workflow automation...

- Increases the level of visibility and transparency into all of your paperwork and processes because everything is viewable and findable in one dashboard. **For example:** Time-stamped action history allows you to identify bottlenecks and ensure deadlines are met.
- Allows HR to focus attention on meeting new compliance standards. **For example:** Remember the GDPR Compliance headache of 2018? Imagine if your HR documents processes were already all in one spot, so you could easily review them to ensure they were in compliance with new regulations.
- Enables access segmentation so that you can set permissions and roles on sensitive documents. **For example:** If your employee evaluation process involves peer review and manager review, you can ensure that the manager can review all evaluation forms while peers can only view their own.
- Ensure data security and accuracy with standardized forms and version control. **For example:** When filling out new-hire paperwork, employees can provide any sensitive information, such as financial or personal health data, in a locked and secure form — no back-and-forth emailing needed.

## USE CASE COVID-19 Vaccination Tracking

A seamless employee vaccination roll-out is essential for organizations to get back to normal. HR plays a key role in this effort, and can benefit from an automated workflow to make sure everything runs smoothly and safely.



## PART 3

# Focus on People, Not Paperwork, By Automating Employee Lifecycle Management

Employee lifecycle management is another key aspect of HR operations. From initial recruiting to exit interviews, HR teams have the opportunity to focus on the human aspect of every touchpoint by automating manual processes and tedious tasks.

## Automation Throughout the Employee Lifecycle

Paperwork and processes throughout the employee lifecycle can be streamlined via automation.

### Recruitment

Once a time-consuming process, much of recruitment can easily be automated, lowering cost-per-hire and time-to-hire.

- Make the job application easy, with digital, mobile-friendly forms
- Streamline the screening process with automated reminders
- Track applications and provide candidates with transparency on their stage in the process with a visible dashboard

### Onboarding

Once you bring a new candidate on board, you can spend more time sharing company culture and getting to know them, and less time on mountains of paperwork.

- Digitize financial documents like W-9 forms, as well as other new hire surveys and forms
- Automate an applicant's ability to proceed in the onboarding process with conditional logic

## Development

This stage, in addition to the HR processes employees encounter on a weekly or daily basis, consists of ways to automate professional development, as well.

- Simplify your employees' evaluation process with digital performance review forms
- Streamline leave management, including paid time-off and vacation requests, as well as timesheet approvals
- Encourage professional development with easy application forms and automated approvals

## Retention

Streamlining and simplifying common HR processes is already one way to retain top talent. However, there are additional retention strategies that can be automated.

- Create and automate a workflow that asks for employee feedback in a digital form and inputs results into a transparent dashboard based on tenure and other factors
- Allow employees (with appropriate access) to view HR forms and processes

## Separation

The final stage of the employee lifecycle — offboarding — is an opportunity to truly learn from and improve upon your HR practices. It's also an important time to ensure that measures are taken so that the rest of your team is set up for future success.

- Reroute workflows to ensure proper access segmentation and approvals
- Prepare for the exit interview with digital forms and documents

## USE CASE

### Employee Onboarding

Onboarding a new employee is an exciting time, but it can also mean a lot of paperwork. Workflow automation can play a key role to make the new hire process run as smoothly as possible so that you can focus on the hire, not their paperwork.



## PART 4

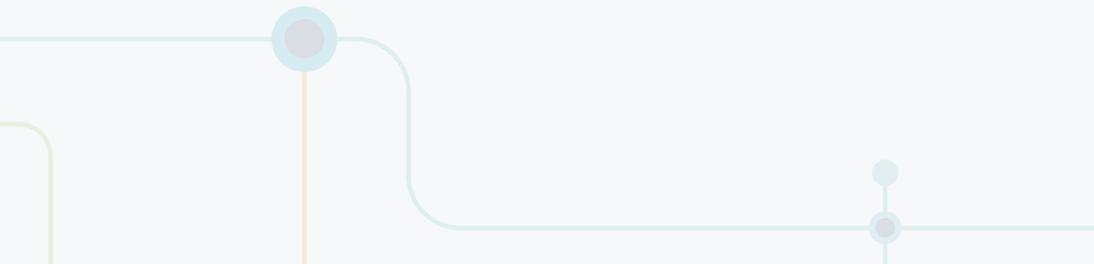
# Elevate the Entire Employee Experience

As automation and digitization have become more widespread, these movements have enabled HR to become a strategic partner to the organization. Instead of “HR Management,” many teams now have names like “People Operations.” This reflects the growing importance of HR, even in a time of remote and hybrid work — HR must still provide an exceptional employee experience to attract and retain top talent.

## The employee experience is critical

With digital workforces, the employee experience is more important than ever. Workers have realized how much they need flexibility, security and stability from their employers, and it’s been HR’s job to deliver on that need throughout the pandemic.

Whether employees stay fully remote, go back to the office, or choose something in between — a hybrid workplace — the employee experience needs to incorporate a digital solution that works for everyone. Workflow automation can help make that experience as seamless as possible for employees working in the office, from home, and everything in-between.



## Automation makes the employee experience more human

Many people may hear “automation” and worry about their jobs getting replaced, even though automation has been growing in HR for over a decade. In reality, a successfully implemented workflow automation solution gives workers more time to have personal interactions with their colleagues and develop relationships.

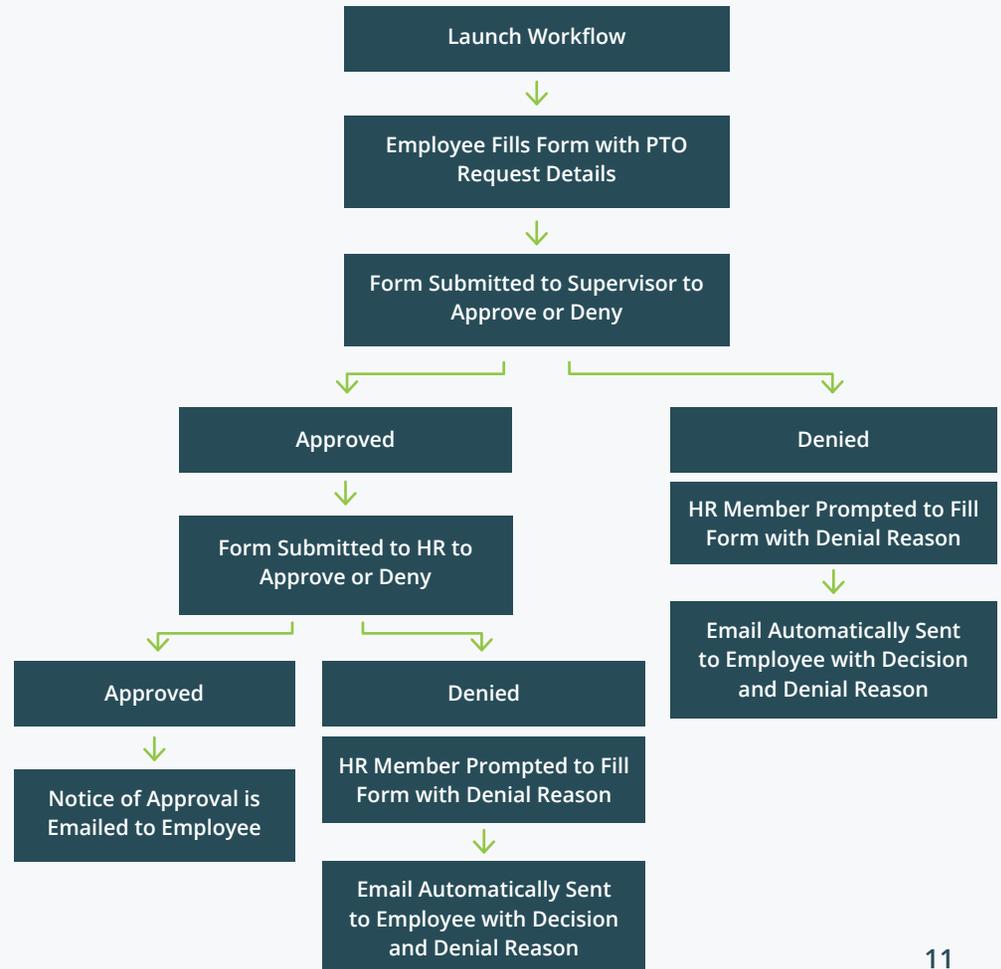
That leaves more time for person-to-person interaction, and helps foster increased collaboration and greater connections between employees and HR. Workers also have more time to think creatively because they don't have to spend as much time on administrative tasks, and can instead focus on more complex tasks.

With workflow automation, HR teams are also able to bring personalized support to employees around the clock. Instead of having to schedule a phone call or face-to-face meeting to fill out paperwork, employees can access what they need at any time. Having everything in one place makes it easier for new employees to settle in, and also provides greater transparency across the company.

In addition, workflow automation gives HR teams more time to solve employee conflicts and be human-oriented, nurturing an overall better company culture. All of these opportunities strengthen employee engagement and empowerment.

## USE CASE PTO Requests

Digitizing and automating simple processes, like PTO requests, may not seem like a big deal. In reality, doing so frees up time for employees to focus on their more important work, instead of searching for the right forms, following up for approvals, and typing out emails. Using conditional logic, automated reminder notifications, and streamlined routing measures turns a time-consuming process into a seamless one.



## PART 5

# Implement a Long-Term Workflow Automation Strategy

Transitioning to a new system can be difficult, especially in a workplace where things have been shifting unpredictably due to the pandemic.

While changing to a new system isn't always easy, it's worth it in the long-term to implement a holistic workflow automation strategy for your HR department. Here are strategies for getting employee buy-in and alleviating some of the growing pains that come with transitioning.



## Getting Organizational Buy-In

If you haven't done so already, securing organizational buy-in on workflow automation is key for ensuring long-term success. An important part of doing this is showing how implementing workflow automation aligns with your HR goals, which could be everything from a quicker recruitment cycle to increased retention; it can even align with your organization's goals as a whole, such as greater productivity and reduced error.

Do this by involving primary stakeholders in your workflow automation implementation project, including:

- **HR managers and administrators:**

Your HR team should, of course, be well-represented in these discussions — everyone from the Chief Human Resources Officer to workforce administrators.

- **Employee end-users:**

Involving employees from different departments and varying levels of tenure can help you factor in the employee experience from square one of your workflow project. Incorporating employees into the process can also bring important process improvements to light.

- **Leadership:**

Senior leaders are important to get buy-in from for any new tool, but especially in a transformative workflow automation platform.

## Identify & Document Key Processes

After getting organizational buy-in on implementing a workflow automation system, now's the time to identify all processes that can be streamlined with automation. You can do this by asking yourself questions like:

- How long does this process take?
- How many people are involved?
- How often do you have to check in on the status?
- How often is data entered incorrectly?

Identifying these pain points, as well as any human elements that need to be considered, is crucial for successful implementation. Document the state of your current processes and then discuss the ideal, future automated state with the appropriate internal stakeholders.



## Determine Key Platform Features

As you seek the right workflow automation system for your HR processes, there are some important features that you should consider:

- Easy customization
- No-code, drag-and-drop interface
- Ready-made templates for your most common use cases
- Integrations and interoperability
- Conditional and parallel branching
- Reporting dashboards
- Fillable digital forms
- Automated emails
- Role-based access, security and permissions
- Easily shareable links
- Required and customizable form fields
- Document storage
- Reusable templates
- Comprehensive support
- Built-in task reminders
- Secure eSignatures
- SOC 2, HIPAA and FERPA compliance

## **PART 6**

# Workflow Automation: Implementation is Critical for Your Post-COVID Organization

COVID-19 has turned the workplace upside down, propelling HR processes and employee expectations years forward in a matter of months. Instead of just surviving on makeshift solutions and partial digitization, your organization can thrive with OnTask, a holistic workflow automation solution. By automating administrative tasks and streamlining processes, your HR team can become a greater strategic partner to the organization and elevate the employee experience.

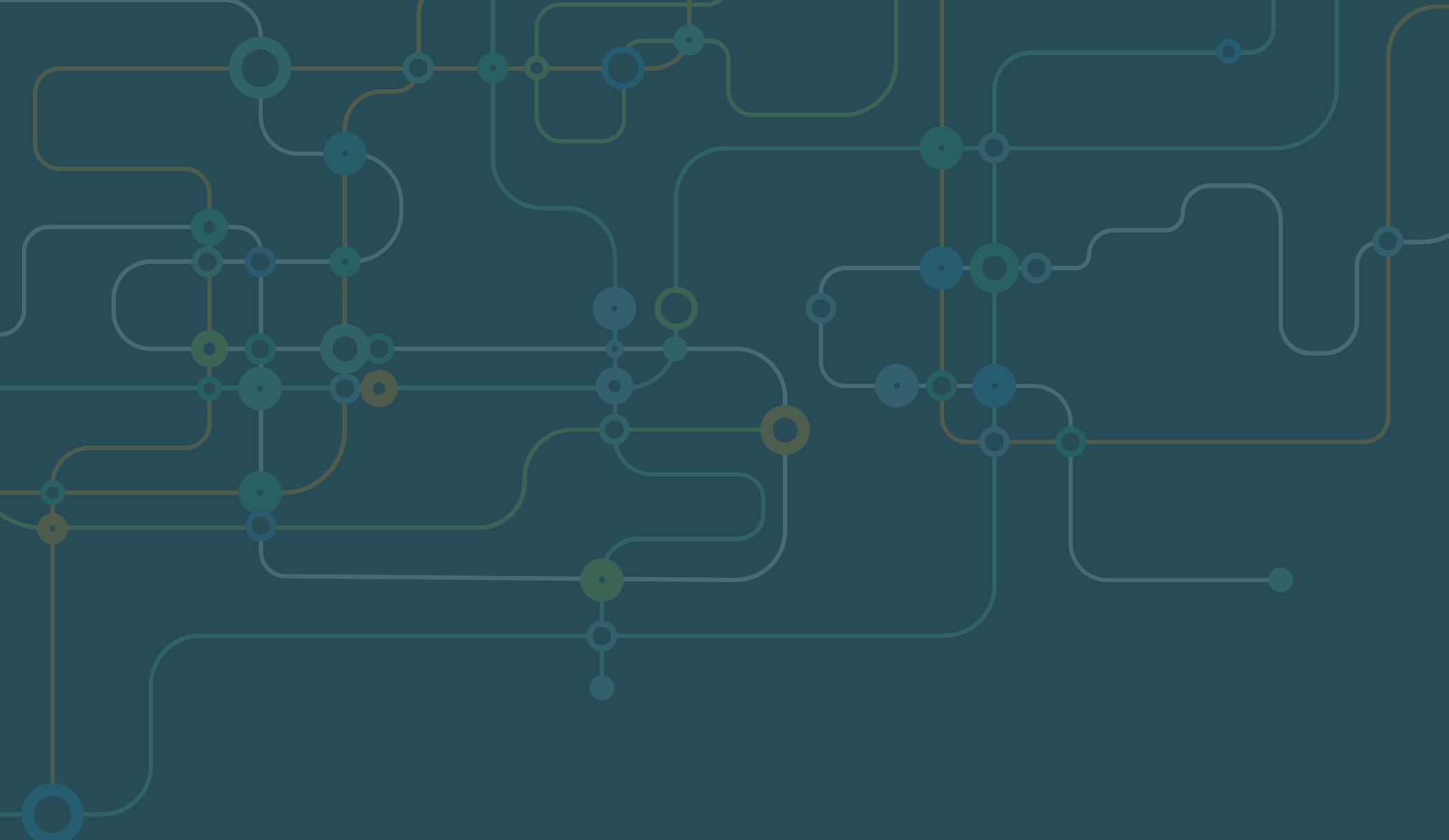
## **About OnTask**

OnTask is a cloud-based, mobile friendly platform that connects forms, digital documents and eSignatures through workflow automation. Compliant with industry-leading security standards, OnTask is an all-in-one workflow automation solution designed to streamline crucial processes for HR and other business functions. OnTask solves for common workplace inefficiencies with easy sharing options, automated emails, built-in reminders, legally binding signatures and more. Our workflow template library, featuring common HR use cases, allows you to easily transform your disjointed processes into seamless, automated workflows.

## **HR Workflow Automation Made Simple**

Quickly turn paper based processes, forms and documents, into digital workflows. OnTask is a cost effective, scalable solution, perfect for small, medium and growing businesses.

**START FREE 14-DAY TRIAL**



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