

# HR BEST PRACTICES

## Across the Employee Lifecycle

You want employees to have a positive experience throughout the complete employee lifecycle from hire to retire. But, how can you provide them this positive experience without adding to the manual burden on your team? Cultivating an effective and efficient forms process can help you strategically provide a more positive employee experience, help protect your company's reputation, and help mitigate risk caused by complicated requirements. You may even be able to do all this while lessening your manual burden and potentially adding to your bottom line.



**Use this checklist for best practices in the Onboarding, Active Employment, and Offboarding stages to help you streamline your processes and help make your employee experience work better for both you and your employees.**

### Onboarding

Did you know that organizations with a strong onboarding experience [improve new hire retention by 82%, and productivity by over 70%](#)? Getting started off on the right foot is essential to onboarding and hanging on to your new hires. Any frustration or delays in the process may mean they move on to the next offer. You want to make the onboarding process as seamless as possible.

#### ✓ Utilize User-Friendly Employee Onboarding Software

Technology should be your friend when developing or refining your onboarding process. Your new hire expects a consumer-like experience with mobile friendly apps accessible 24/7 from any device with minimal starts and stops or exits to other programs. An integration with your onboarding system utilizing Application Programming Interfaces (APIs) can help you get there.

#### ✓ Stay on Top of Your Forms

While not necessarily fun to fill out, federal and state forms have strict timing requirements, and failure to comply may lead to fines. One of the best things your onboarding process can do is help get them completed quickly and more accurately so that you get the information you need to help fulfill the requirements.

#### ✓ What About WOTC?

If you are not screening for the [Work Opportunity Tax Credit \(WOTC\)](#), you may be missing out on big money that could drop straight to your bottom line. Employers can receive a federal tax credit up to \$9,600 per eligible employee, and with an average of 20% of employees qualifying, that can add up fast. If you do not currently have a WOTC screening program, check out our [WOTC calculator](#) to see how much one could potentially help save your company.

#### ✓ Order matters

Position the most important forms early in the process, especially those with specific time requirements and follow with those that should only be completed once you are more certain the employee will actually begin work, such as the handbook and providing access to company assets and networks.

Onboarding

### Active Employment

A good mix of benefits, training, and career development resources can help mitigate potential burnout and subvert the idea that the grass may be greener somewhere else. Providing these valuable benefits can include navigating complex documentation and regulations, but can help boost brand attractiveness and employee morale.



#### ✓ Help ensure employees have access to affordable healthcare and you stay compliant

Employees who enroll in their employer's health plan tend to have more staying power than those who don't enroll.<sup>1</sup> But, as an employer, complying with the Affordable Care Act (ACA) can be a challenge as regulations change frequently and can be quite complex. To better stay on top of your requirements and responsibilities, be sure to have process in place to help measure employee eligibility, [manage and track form approvals](#) and submissions, and help deliver forms to your employees and submit them to the IRS. Getting it wrong can lead to [steep penalties](#). Learn how we can help you solve your [ACA management challenges](#).

<sup>1</sup>The Equifax ACA data study, 2022. Individual results may vary

#### ✓ Train employees for future roles

Cultivating a culture built on learning, development, and career growth may help develop organizational efficiencies, improve employee engagement, and help with the recruitment and retention of talent. Provide resources and training for your employees to develop and learn new skills to help prepare them for greater career development and mobility.

#### ✓ Focus on financial wellness

Financial stress can be taxing on productivity, retention, attendance, morale, and overall engagement. Investigate financial wellness programs and benefits that can help empower employees and demonstrate your commitment to your employees' financial well-being.

These can include emergency savings, tuition forgiveness, retirement accounts with a corporate match, help investigating and simplifying the [Public Service Loan Forgiveness \(PSLF\) program](#), and [identity protection services](#).

#### ✓ Stay on top of annual notices

Some states have notices that have to go out on an annual basis to your current employees to make sure they have seen the most up-to-date notice, and that they are aware of those policies. In addition, you may have your own notices or policies that you need to send out. These notices may be required at the beginning of the year, end of the year, or be event driven. If not managed properly, they could result in fines from the states or confused employees. Make sure you have a plan to distribute these notices to keep your employees informed and your processes in good form.

Active Employment

### Offboarding

Employees leave organizations for a variety of reasons - a new job, retirement, or layoffs to name a few. Regardless of the reason, as an employer, it is your job to help ensure their exit is as streamlined as possible for both you and them.

Around 15% of new hires are actually either alumni or referrals.<sup>1</sup> So, providing a positive experience for those leaving your organization could be fruitful in the long run.

<sup>1</sup>Turn Departing Employees into Loyal Alumni, Harvard Business Review, March 2021.



#### ✓ Deliver your separation forms in one digital packet

As your employee is leaving the organization, you want to make it as easy as possible for them to get everything they need in one location. Sending them a notice in one system, instructions on what to do with their equipment in another, and maybe their COBRA information in a completely separate system can be confusing, things get missed, and it's often difficult to track. If you have it all in one system, and send it all at one time, management of these documents can be much easier for you and the employee.

#### ✓ Be careful to send the right separation forms on time and to the right employees

You may have employees in 15 to 20 different states, and as required separation forms are being added, legislation is changing, and different requirements are being enacted, you still need to be able deliver the right forms to the right individuals. Many of the states have fairly tight timelines to get separation notices to employees. A defined and repeatable state forms process can help you get the right form, to the right employee, at the right time, while lessening your risk of fines.

#### ✓ Equip outgoing employees to better succeed in their next role

Showing a vested interest in helping your workers find their next role goes a long way in building rapport and a positive company image. Consider offering [reemployment services](#) such as resume help, mock interviewing, and more to help them land their next gig. Supporting exiting employees with reemployment tools can go even further to help springboard them to their next career opportunity - while also helping to reduce your unemployment cost.

#### ✓ Don't forget about the employees who are staying

When employees leave, it can really impact the employees who are still left with your organization. They may need to take on additional responsibilities. They may be disappointed that their coworker left. It's important to have a transition plan in place to help reorganize the roles, responsibilities, and work going forward, and to help remaining employees feel supported.

Offboarding



### The Advantage of Automation

While employees increasingly expect a more personalized experience throughout their employment lifecycle, the rapidly changing and complex regulatory environment means there is more risk and cost around workforce forms management - often making that positive experience more difficult to deliver.

Automation can help you more consistently and properly manage your HR processes with less effort, while also helping you mitigate your risk. A forms management solution for onboarding, annual notices, offboarding, and state required forms can help alleviate that manual burden and reduce the chance for errors.

**Learn how [Forms HQ](#) can help you transform your HR forms management process throughout the entire employee lifecycle - helping you to deliver your right forms, to the right person, at the right time.**