

Self-Service Features, Challenges, Tips for Employers

BY GRACE FERGUSON

The era of employees fully relying on their HR/payroll team is winding down, thanks to self-service solutions.



Self-service empowers employees to perform some routine HR-related tasks on their own instead of contacting the HR/payroll staff for support. This promotes employee autonomy and enables HR divisions to serve as strategic business partners rather than strictly back-office functionaries.

Recognizing the benefits of self-service, employers are speedily embracing the technology. In the 2019-2020 Sierra Cedar HR Systems Survey, 81% of employers say they offer employee self-service (ESS), and 65% say they also provide manager self-service (MSS). ESS adoption is expected to grow 7%, and MSS 13%, over the next year.

But there's more to self-service technology than meets the eye. Therefore, employers should acquire essential knowledge before deploying the solution. This includes gaining an understanding of features, challenges, implementation, training, and utilization.

ESS, MSS Features

Though ESS and MSS portals are both web-based tools, their features vary by technology vendor—often ranging from basic to advanced. Moreover, an employer's self-service needs depend on various factors, including business size and industry. Whereas some employers use self-service for basic payroll/benefits purposes, others focus the solution on a breadth of HR services.

Commonly, an ESS lets employees do the following:

- Change their personal information, such as name, home address, email address, phone number, marital status, and emergency contacts
- Access company policies and procedures, including the employee handbook
- Update payroll data, including direct deposit and tax withholding information
- View and print pay statements and Forms W-2

Grace Ferguson is a Writer/Researcher for the HR, payroll, and benefits industries and a member of the Board of Contributing Writers for PAYTECH.

- Manage benefits information
- Enroll in benefits during onboarding and open enrollment
- View work schedules
- Clock in and out remotely
- Track hours worked and paid time off balances
- Send time-off requests to managers
- Update work availability
- Submit documentation, such as for expense reimbursements

Commonly, an MSS lets managers do the following:

- Edit and approve timecards
- Request employee status changes
- Respond to time-off requests
- Approve expense reimbursements
- Respond to employee inquiries
- Review employee information, profiles, and competencies
- Develop personnel action forms
- Delegate responsibilities
- Receive event notifications, such as birthdays and work anniversaries
- Generate customizable employee reports

ESS, MSS Challenges

It's important to keep potential obstacles top of mind when instituting ESS and MSS. The 2019-2020 Sierra Cedar survey found that the top barriers to rolling out ESS included the following:


- Lack of workstations
- Poor user experience
- Computer literacy issues
- No single system
- Company interest
- Language barriers
- Cost of licenses

The top barriers to rolling out MSS were the following:

- Company interest
- Time constraints
- Poor user experience
- HR data accuracy
- No single system
- HR data privacy
- Cost of licenses

Tina V. Foy, MBA, Principal of TVFoy Consulting, has more than 20 years of experience implementing human capital management (HCM) solutions for industry-leading organizations. She believes that one challenge employers or payroll professionals might face when implementing an HR/payroll self-service solution is providing access to all users.

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“Depending on the industry/type of organization, all users may not have the capability to access the tool,” she said. “Employers should consider this key element in their business case, as implementing the solution may require investment in kiosks, tablets, etc.”

Foy noted that, “in a manufacturing environment, for example, all employees do not work at a company-provided computer. In this case, the employer would need to make both a computer and printer available to employees.”

Regardless of whether the employer outsources HR/payroll duties or handles them in-house, the question is: Do employees have access to a computer that allows them to perform the self-service actions? Foy said that she finds this more of an issue for ESS than MSS.

Additionally, employers may face implementation roadblocks if they did not lead with their business processes during the selection cycle, Foy said.

“Many employers find it necessary to make concessions and create workarounds for important aspects in the workflow approval process,” she said. “The self-service technology should enable the organization’s business processes, not encumber them or create inefficiencies.”

Implementation Strategies

To access ESS and MSS, employees and managers can simply log into the respective portal via their unique credentials. However, implementing the solution is far from simple. On the plus side, hurdles can be minimized or overcome with a sound implementation strategy.

Foy recommended that employers do the following:

- Establish an agreed-upon governing definition of the in-scope business processes, policies, and practices prior to launching the implementation
- Be flexible. The selected solution may not perfectly align with the organization’s business processes, policies, and practices.
- Design for the majority of business transactions, not the exceptions
- Request a product demo to obtain a baseline understanding of system features and functionality
- Document and assess the post-go-live impact of the implementation on roles and responsibilities in the organization
- Develop, then execute, a comprehensive change management readiness plan

Many payroll outsourcing firms offer self-service solutions, which are available to client employees. Employers looking

to take this route should seek an outsourcing partner capable of fulfilling their payroll administration and self-service requirements.

Training, Utilization

Misuse or non-use of ESS and MSS may result in a missed opportunity to transform the HR divisions into strategic units that help drive organizational growth. Further, the organization may lose out on the hard and soft savings associated with employees taking responsibility for certain work-life-related HR practices.

But how can employers champion proper ESS and MSS utilization? The secret lies in training that aims for a thorough comprehension of the systems. It’s vital that employees and managers understand why the self-service tools are being offered, the benefits of the tools, and how to accurately leverage them.

When crafting self-service training plans, employers should think about the following:

- Remember that habits are hard to break. Employees may need time to adjust to the change in how they obtain and submit HR/payroll information.
- Reassure employees that the portals are designed to enhance the HR and payroll departments, not replace them
- Be prepared to address concerns employees and managers have about the solution
- Tailor training to reduce the likelihood of human errors. For example, tell employees which forms to fill out through ESS and by when to submit them, plus when to contact their manager or the HR/payroll team versus utilizing ESS.
- Emphasize the importance of entering correct information
- Explain the consequences of not using ESS when required, such as delays in processing direct deposit or benefits changes
- Be committed to ESS and MSS training (if both tools are offered). Don’t shortchange one in favor of the other.
- Make ESS and MSS education an ongoing initiative instead of a one-time endeavor
- Partner with a vendor that integrates training and customer support into its self-service delivery model. This may include built-in support features, how-to videos, live support, and documentation with instructions for employees and managers.

Staying Current

As self-service technology continues to evolve, innovations are always on the horizon. When the tides shift, employers should be ready to evaluate the trends for compatibility within their respective organizations. ■