



SECURED SIGNING FOR ELECTRONIC DOCUMENTS

CASE STUDY
H&R BLOCK

H&R Block Eases the Tax Burden

By David Schulz

Tax time is a busy time for everybody. The people charged with recruiting tax agents for Australia's leading tax preparation company are busier than most. For H&R Block's district managers it often translated to weekends at home giving themselves writer's cramp to keep up with just physically signing hundreds of employment contracts.

This year has seen a total transformation of the process with the adoption of a Secured Signing solution to quickly and simply invite tax agents to sign their contract online. What was a paper logistics nightmare is now a win/win/win for all concerned. Managers love that the new system allows them to sign contracts wherever and whenever and have reclaimed their weekends. The Human Resources team has achieved much greater process consistency and audit ability. New tax agents have reported they find Secured Signing a more convenient way to sign and return their employment contract.

Each year in the run up to tax season, H&R Block employs thousands of tax agents. The logistics of the traditional paper process and the coordination across 420 offices across the country was an enormous challenge. "Paper was the bane of our life" says Bill Cashman, HR Manager for H&R Block. Not only was the paper process a massive logistics exercise, it consumed lots of effort in tracking which documents had been generated, which had been sent and following up with agents to ensure the documents had been signed and returned. There was always the possibility of things being missed and variability creeping in to the process.

DIGITAL SIGNING

Of course at the end of the process all the paper documents had to be stored somewhere. Storing paper contracts also made finding a contract hard work.

Knowing paper was the core of the problem, H&R Block went searching for reliable ways to sign documents electronically. Secured Signing was selected based on the high security of the service, its use of personal PKI digital signatures and the advantages of working with a local partner. Mr Cashman noted that “It’s a new way of doing business, but it’s really sped up our recruitment process and provided some great efficiency without causing any technical headaches to implement.”

The Secured Signing solution provides automation of the entire process not just document signing. A tailored workflow was developed that matched precisely the needs of H&R Block.

“ Our ability to deliver this bespoke solution for H&R Block is a great example of how Secured Signing is able to understand the business needs of the partners we work with, and then deliver to them a system that provides tangible results.

Mike Eyal, the Managing Director of Secured Signing.

The H&R Block District Manager uploads a spreadsheet containing the details of the new tax agents. In a single process the manager can invite one or a thousand agents to sign their contract using Secured Signing. The workflow generates an individualised agreement for each tax agent and manages the process of having the employee and then the manager sign the agreement. Upon completion of the signing process, all parties receive a copy of the signed agreement. The workflow also sends a copy to human resources for central record keeping.

Secured Signing provides automated reminders for all invitees to ensure documents are signed on time. There is also management dashboard giving visibility of the invitations issued, those outstanding and those that are complete.

Adoption of the new process has been high. H&R Block were conscious that many of their tax agents are retired or semi-retired and there was a concern they may not accept the change to online signing. This concern has proven to be unfounded with employees not only successfully completing the online process but finding it more convenient.

The Secured Signing solution for H&R Block has delivered a stronger governance outcome for the human resources team while reducing the time and effort that district managers spend on boarding employees. The solution is also identified by employees as more convenient.

Secured Signing has been a massive reduction in logistics with local offices freed from the time consuming and expensive process of manually generating the agreements, printing, enveloping and posting the documents by mail. The transition to an online process has also shortened lead times with the whole process quicker and turnaround by the employees significantly reduced.

Everyone finds Secured Signing more convenient. Rather than district managers taking a pile of hard copy contracts home on the weekend, they can check what contracts are ready for them to sign wherever they are, whenever they have time and sign them on the spot. Employees can sign their agreement online wherever they are and whenever they have time and avoid a trip to the post office.

With all offices using the same system, a common workflow and the template agreements embedded in the workflow, Secured Signing has delivered a significant lift in consistency of process and outcome. H&R Block are now completely confident they have a signed contract for all staff that can be quickly and easily retrieved if required. The audit trail logged by Secured Signing and the personal PKI digital signatures used provide very strong confidence in the signed documents.

H&R Block have realised an immediate return on the investment made in the Secured Signing solution. It has delivered stronger governance outcomes around their employment contracts while reducing the time their staff spend on the process and providing employees with greater convenience.

The project has been such a success it has naturally sparked interest in how digital signing can be used to improve a range of other processes.

Source: IDM- Image & Data Manager (IDM)





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