



Leveraging the Value of Employee Self-Service Portals

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scope—This toolkit covers the value and effective use of self-service portals, including their use for functions such as benefits enrollment, employee onboarding and employee training.

Overview

This toolkit covers the use of online self-service portals to conduct a wide range of HR transactions that were formerly conducted via paper transaction or a diverse set of online solutions that could not be accessed through a single gateway. Some examples of such employee self-service (ESS) transactions include employee personal data and updates, employee onboarding, benefits enrollment (initial, annual and miscellaneous changes), employee training/e-learning, performance management, time and attendance, access to handbooks and policies and other organizational culture information, and wellness surveys and resources. In addition, many organizations have deployed manager self-service (MSS) portals through which managers can relieve HR of some transactional tasks. Both ESS and MSS can reduce the time HR professionals spend on administrative tasks, freeing them to raise their value in the organization by participating in more strategic planning.

This toolkit covers the following topics:

- Background of ESS and MSS portals.
- HR's role in implementing ESS and MSS systems.
- Tasks that can be completed via self-service portals.
- Employee-friendly portal features and benefits.
- Employer/HR-friendly portal features and benefits.
- Business case for implementing ESS and MSS systems.
- Legal issues related to using online portals.
- Communications issues related to portals.
- Metrics involved in online portal systems.
- How portals benefit global organizations.

Background

Employee self-service (ESS) portals are web-based tools through which employees can access relevant information and conduct certain transactions from a central online site or gateway. Some organizations also use the employee portal to deliver both corporate and HR-related information. In others, the focus is strictly on employee benefits or other HR services.

An ESS portal may be a part of, or used in conjunction with, an employee intranet.

ESS portals provide numerous benefits for employees. Consolidation of information into one user-friendly gateway creates efficiencies and helps quickly align employees with organizational objectives. Costs decline as employers consolidate redundant information and web pages, and productivity improves as employees spend less time looking for the information they need. In addition, employee satisfaction levels rise due to improved communication throughout the organization.

ESS portals also play an important role in raising HR's stature in the organization, enabling HR professionals to spend more time on strategic efforts in line with the organization's goals than on focusing on administrative transactions.

Dynamic portals

Human resource intranets have been in existence for nearly two decades, and they have increasingly grown from "link farms"—designed primarily to reduce paper-based costs and promote self-service—toward more personal, interactive and multidimensional sites. Still, HR portals that meet those goals are in the minority because:

- HR staff have limited technical knowledge.
- Organizations often lack seamless access to third-party vendors, such as 401(k) or health plan providers.
- Site designs are not intuitive or user-friendly.
- Information on the site is outdated, thereby proving unreliable to users.

More dynamic portals, on the other hand, are characterized by systems that:

- Enable HR staff to create, manage or edit content with little help from IT staff.
- Have identity management features that display portal content tailored to users' specific attributes, such as job categories, union status or benefits plans.
- Feature single sign-on functions that grant employees access via the portal to content from third-party vendors without the need for additional passwords.

Employees today tend to compare corporate portals to popular sites they use outside the workplace, such as Amazon.com or social media sites, which offer the latest in personalization, engagement and search technologies. Employees are unlikely to support portals whose features and functions seem to be lacking. That could push transactions back to paper—and HR professionals.

Personalization has become a hallmark of many next-generation HR portals. Another defining feature is online decision support—tools designed to help employees compare benefits plan features, understand insurance coverage relating to specific events and estimate medical costs while enrolling via portals.

As bandwidth capacity expands and executives gain insight into employees' communication preferences, video is playing a more prominent role on HR portals. Some HR information systems (HRIS) managers say web-enabled video is becoming the communication medium of choice on many portal platforms.

Business Case

Employee self-service portals allow employees to have quick and easy access to HR-related transactions and services that HR personnel would otherwise have to provide. This can reduce HR's tactical duties and free up time for more strategic pursuits, with realized cost savings in time and efficiency. User-friendly and paperless, ESS portals can also help standardize processes, reducing errors and enhancing reporting capabilities. See [What are the pros and cons of using a benefits self service-program? \(www.shrm.org/ResourcesAndTools/tools-and-samples/hr-qa/Pages/prosandconsofusingbenefitselfservice.aspx\)](http://www.shrm.org/ResourcesAndTools/tools-and-samples/hr-qa/Pages/prosandconsofusingbenefitselfservice.aspx)

HR's Role

Technology has noticeably changed HR management; most firms provide universal access to HR services through technology and web-based applications. These changes often result from the need to cut costs and expand or improve services. Organizations that successfully adopt sophisticated HR technology tools outperform those that do not. But the simple automation of HR processes can no longer guarantee a competitive advantage. Instead, organizations must determine how to use technology to transform their HR practices and market their HR brand.

This transformation of HR service delivery requires an elemental change in the way HR professionals view their roles and ability to provide HR service delivery using web-based technology. Now HR professionals must not only master traditional HR skills and knowledge but also apply that knowledge via technology. In addition, as employees become more tech-savvy, HR professionals must have some knowledge in design to ensure the technology provides a good user experience. See *Designing and Managing a Human Resource Information System*. (www.shrm.org/ResourcesAndTools/tools-and-samples/toolkits/Pages/managingahumanresourceinformationsystem.aspx)

Relationship with IT

Today, core HR responsibilities as diverse as recruitment, oversight of legal and regulatory compliance, benefits administration, and the safeguarding of confidential employee information cannot be carried out effectively without the use of sophisticated technology tools.

The increasing reliance on technology requires HR professionals to work closely with their colleagues in IT around such issues as data integration and privacy. This may require establishing designated HR technology roles in either the IT or HR department.

In nearly all organizations, HR professionals considering any kind of system have had to become versed in the vernacular of information technology—learning concepts once strictly the domain of computer science majors—such as models for service delivery (e.g., leased, hosted or licensed) and the risks, benefits and costs associated with any selection. Partnering with the IT department ensures both HR and technology experts participate in the buying decision, thereby reducing the risk of spending large sums on a product or service that will not meet the organization's needs.

Portals Can Tackle Most Administrative Tasks

ESS delivers measurable efficiencies to employees and the organization by eliminating inaccuracies in data collection by offering a single point of entry and immediate application of business rules. It also makes employees responsible for keeping their own information accurate and up-to-date. Finally, integration with systems across the organization increases the speed of HR transactions.

Employee personal data and updates

Some portals enable employees to change personal data, enter time worked, print out pay slips, enroll in employer benefits and schedule vacations. Some include preconfigured life events pages that allow employees to follow a series of steps related to each activity—marriage, divorce and birth or adoption of a child. Users can add their own events to supplement these scenarios.

Recruitment

Company recruitment portals are increasingly popular. They allow applicants to search and apply for open positions. Applicants can check on the status of their application or where the organization is in the recruitment process. Another common feature is allowing candidates to request to be alerted when similar new postings appear. Overall, the increase in efficiency and reduction in paper has been significant in this area through the use of self-service portals.

Employee onboarding

Another time-consuming task that ESS can handle for HR is onboarding and orientation of new employees. Virtual orientation is a growing trend in onboarding. For example, new staff members can simply log in to an inviting virtual corporate environment. There they will receive key information for getting started in their new jobs.

At Marriott, for example, new employees can listen to and interact with leadership speakers in a series of webinars and other activities. See *Virtual Onboarding: A Closer Look*. (www.shrm.org/ResourcesAndTools/hr-topics/talent-acquisition/Pages/Virtual-Onboarding.aspx)

A strong web-based onboarding program can help new hires become effective in their jobs more thoroughly and expeditiously, which increases productivity and employee satisfaction. ESS-based onboarding is becoming increasingly popular as employers seek to streamline the hiring process, allowing organizations to:

- Track and monitor new hires in the onboarding process and make new employees feel more welcome and excited about beginning their new jobs.
- Go paperless with all forms while eliminating data entry and improving accuracy.
- Take new hires through an online tour—with personalized content, streaming videos and more.
- Connect new hires virtually, thereby strengthening the new-hire community even though employees may be in different states or countries.
- Automate provisioning for uniforms, parking passes, computers, e-mail addresses and security badges.
- Help new hires evaluate and select health insurance and other benefits plan choices, which can be processed on the appropriate date after employment begins.
- Guarantee that policies and compliance requirements are approved and recorded electronically.

Benefits enrollment (initial, annual and miscellaneous changes)

One of HR's most challenging responsibilities is benefits enrollment for new hires and annual enrollment for all employees. An open enrollment ESS platform can streamline the process by letting employees make their own selections and calculations, based on employer-directed options. Many of these can be integrated with feeds from an organization's HRIS to ensure information is up-to-date and to connect interrelated payroll, HRIS and benefits systems into one seamless portal.

Most large employers outsourced benefits administration some time ago; then, as technology improved, providers began using software and the Internet to automate open enrollment and other benefits-related processes. These outsourcing agreements are typically large, multiyear deals that include services such as call center support and that are feasible mainly for employers with thousands of workers.

However, payroll processors and other vendors now offer open enrollment solutions for smaller organizations, enabling them to reap some of the automation benefits that large employers gain from outsourcing.

Some organizations are using their ESS systems for financial literacy training as well as for other e-learning options. For example, benefits enrollment often includes selection of retirement benefits and calculators for helping employees make decisions. Unfortunately, employees may not have enough financial savvy to make the best selections.

Today, some organizations are adding personal financial information and tools to their ESS portals. These additions go beyond simply explaining the features of a company's benefits program to providing tools employees can use to assess their own financial situation and develop strategies based on their priorities, whether that includes planning for college tuition costs, major medical expenses or retirement.

To help employees more accurately calculate how much money they will need in retirement and to make the best investment choices to reach that goal, employers are investing in financial portals. In some cases, related software and content reside on the benefit provider's servers and are linked to internal ESS sites. Employers choose the features they want to include, and the vendor brands the portal to match the rest of the ESS or intranet. The portals contain information applicable to all employees, such as the organization's benefits package, as well as general financial educational materials and financial and market research reports.

Employee training/e-learning

Technology has had a significant impact on organization and employee development in e-learning and computer-based testing. Organizations increasingly use technology to deliver training, which helps them reach a broader audience and increase efficiency.

Broadly speaking, e-learning is education using the Internet, a computer network or a stand-alone computer. Specifically, e-learning applications and processes include web-based learning, computer-based learning, virtual classrooms and digital collaboration. E-learning presents many advantages over traditional classroom training, including time savings, reductions in travel costs, and flexibility in time and location.

Performance management

Employers are also making significant investments in the talent and performance management systems that support employee retention and engagement. For example, many ESS portals enable employees to complete self-evaluations, set goals, input information about training and development activities, and review, respond to and sign annual performance evaluations. ESS allows human resources to focus more on value-added processes in the performance management process. These systems also benefit the HR professional by condensing the results of entire performance management and compensation system in one place, facilitating analysis and reporting.

Time and attendance

Time and attendance systems are increasingly viewed as more than a way to accurately track workers' hours or to stay compliant with the wage and hour regulations of the Fair Labor Standards Act (FLSA). HR leaders look to these systems for more self-service features to accommodate the needs of mobile workers and for labor cost reporting.

Some time clock systems enable web-based management of data collection through ESS portals and mobile apps. Such systems, providing real-time display of time and attendance data, allow workers to punch in and out from anywhere they can connect to the Internet and alert managers when employees are approaching overtime or their attendance routines change, rather than having to wait for batch data that can take longer to analyze.

These systems can help HR reduce its administrative burdens and assist line managers by reducing the time they spend editing employees' time sheets or ruling on "exceptions" to a schedule or assigned work pattern. Features that enable employees to log on and view their work schedules, check timecards, review accrued benefits or place vacation requests all save HR professionals time.

Federal and state wage and hour regulations can be complex, as can union rules or commission calculations, and time and attendance issues are common targets for employee lawsuits. Often worth the investment is software with built-in edits, coded features and reporting functions that ensure employees are appropriately compensated for overtime or that child-labor laws are obeyed.

Some time and attendance software offers advanced labor cost management and workforce planning capabilities that appeal to many organizations with irregular work schedules or unionized workforces. Automated employee scheduling features have become more common in vendors' workforce management software packages.

In addition, time and attendance system vendors are offering an application development platform that enables employers to create their own apps to boost staff productivity or efficiency. For example, one workforce management company created a health care app that allows busy employees such as nurses to order food from the hospital cafeteria using a time clock and to schedule later delivery or pick-up. See *On the Clock*. (www.shrm.org/hr-today/news/hr-magazine/Pages/0412tech.aspx)

Wellness surveys

Employers are also using their ESS benefits enrollment systems to encourage employees to adopt healthier behaviors. For example, many U.S. organizations have incorporated health risk assessments into their electronic enrollment systems, and some use enrollment systems to encourage employees to sign up for disease management programs.

Wellness vendors help organizations design programs to incent employees to lead healthier lifestyles, and these often use ESS to help employees track progress toward defined goals.

Employee-Friendly Portal Features and Benefits

"HR portal technology is growing in both prevalence and usefulness. More than half of organizations use portals, primarily to enable employee self-service, but also to ensure compliance, communicate policy and increase collaboration within HR," states *Explore the Possibilities, Seize the Moment: 2013 HR Service Delivery and Technology Survey Executive Summary Report* from Towers Watson.¹ "Right now, more than half of all responding organizations have an HR portal that is available both inside HR and to employees. Another 19 percent are working to develop one. A large majority (nearly seven in 10) of organizations with an HR portal provide access to 75 percent or more of employees." See *Global HR Service-Delivery Processes, Technologies in Flux*. (www.shrm.org/ResourcesAndTools/hr-topics/global-hr/Pages/Global-HR-Service-Delivery-Processes-Technology.aspx)

Towers Watson says popular portal features include an HR knowledge base (in 60 percent of cases), internal HR team sites (53 percent), onboarding for new employees (43 percent), web-based summary plan descriptions (34 percent) and HR case management (30 percent).²

"Organizations with HR portals are also generally satisfied with their results. Slightly more than six in 10 report that their portal is somewhat effective, and 17 percent describe it as very effective. We predict that satisfaction levels will increase in the future as the technology and the information included in portals grow in sophistication and value to users," Towers Watson reported.³

One of the most significant changes in the practice of HR management has been the "democratization" of HR data, expanding access to employees, managers, health insurers, workers' compensation carriers, senior executives, job applicants and regulatory agencies. These diverse users have unique needs that various solutions are designed to meet.

An HR portal provides a single, targeted and often customized access point for each employee (and increasingly, each job applicant). The HR portal allows an individual to access the necessary resources and data for his or her circumstances and position, enabling each to design an interface that displays the most relevant data. Most HR portals are also web-enabled, so employees can access HR services anywhere and anytime on a variety of mobile devices. See *Designing and Managing a Human Resource Information System* (www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/managingahumanresourceinformationsystem.aspx).

Employer/HR-Friendly Portal Features and Benefits

The ESS features that employees find so convenient also benefit HR because they can increase the department's efficiency, which frees time for more strategic HR involvement in the overall business functions. For example, the ESS portal or intranet can be designed to recognize HR staff members and provide custom links to HR-specific systems, such as Form I-9

management and prehire screening systems. Some HR staff members' home pages include links to websites of relevant associations and reference groups and access to less frequently used transactions, such as leaves of absence and military call-up.

By applying technology where appropriate to deliver or solicit information to and from employees, HR teams are not only streamlining functions but also improving accuracy and better serving their employees. As a result, ESS tools are increasingly being recognized as necessary and critical to the ongoing effectiveness of the organization.

Streamlined communications with carriers, brokers and employees

Better management of the employee benefits plan can lead to significant cost savings. Reconciling insurance bills is much easier when everything is online and reports that can be cross-checked against bills are easy to generate without IT support. Benefits administrators can eliminate double billing, terminated employees who are still on the books, bills for the wrong coverage and similar errors.

Other advantages of web-based benefits administration include:

- The convenience of third-party hosting, which reduces internal IT burden.
- 24/7 system access from anywhere for employees, HR and managers.
- A closer relationship with insurance brokers and carriers through information sharing, which can lead to better health plan options for the organization.
- Streamlined and more accurate communications with carriers, brokers and employees.
- A smoother interface with payroll with fewer errors because no rekeying is necessary.
- The ability to uncover overpayments of premiums.
- The ability to easily handle multiple plan types, tiers, rules and eligibility requirements during open enrollment.
- Easy access to reports that brokers need when the employer wants to compare plans, such as census data, costs and budget.
- Simplified updates of employee communications materials such as benefits books, handbooks, carrier directories, new-hire forms and summary plan descriptions.
- Streamlined compliance with federal and state regulations for employee communications, such as summary plan descriptions.
- More employee satisfaction and fewer calls to HR.

Information sharing and meeting tracking

HR staff members can also use the intranet for information sharing among widely separated locations. For example, collaboration software enables HR professionals to post and share PowerPoint presentations, white papers and other documents.

Similarly, HR can develop an intranet meeting-tracking system that improves follow-through. For example, instead of e-mailing meeting minutes and action items, that information can be stored in a database accessible to all participants at any time.

Reinforcing corporate culture

Intranets are natural vehicles for reinforcing corporate culture, boosting morale and fostering team mentality. For example, HR and managers can use the intranet to share employee or department success stories, recognize employees who solve problems or improve processes and remind users of organizational objectives.

Few limits on HRIS functionality

Self-service functions are found across HR applications from multiple vendors, and employers are looking beyond the basic functionality that allows employees to enter static data on themselves, sign up for benefits and view pay stubs. Advanced functionality can add much more for managers, retired and current employees, and recruits. HRIS vendors can automate just about anything. For example, some provide specialty functions for stock option management, pension administration, health and safety management, succession planning, and role-based portals.

Of course, not every system will handle every function, so HR professionals must consider what they want to automate when selecting vendors and systems.

Talent management

HRIS vendors have evolved offerings to keep pace with shifting workplace trends and technologies, giving HR technology leaders new deployment options as well as new functionality for mobile users and social media applications. Many organizations are upgrading systems to create a more integrated approach to people management and to generate more meaningful workforce reports.

HRIS were initially designed to meet payroll needs first and human capital needs second, but next-generation HRIS platforms, which often include more talent management components, flip that formula.

"The desire of most HR leaders no longer is just to count heads but rather to truly understand what employees are made of, identify their best recruiting sources, determine what current skill sets look like, assess people's potential for promotion and more,"⁴ said Jason Averbook, CEO of Knowledge Infusion, a Minneapolis-based human resource consulting firm. "The worlds of core HRIS and talent management systems are blending and blurring and in the next few years will be seen as one and the same."

Vendors are offering new options for integrating talent management systems such as recruiting, performance management and learning management with the backbone HRIS functions. Such integration can enable more strategic talent analysis as well as reduce redundant data entry or storage.

True systems integration—in which data are entered or updated in one HR system and are changed automatically in another—can take workforce metrics to a new level. For example, HR can create reports measuring how many employees, onboarded through specific systems, reached the high-potential level. In addition, HR can determine how well managers performed following certain training or development programs.

The ultimate goal of any HRIS should go beyond processing or housing data to generating meaningful reports or analytics that help manage talent better, Averbook said.⁵ See HRISs Get Bells and Whistles. (www.shrm.org/ResourcesAndTools/hr-topics/technology/Pages/HRISUpdate.aspx)

Manager self-service

MSS is experiencing a surge in importance thanks to a variety of new structures, processes and technologies, according to the 2013 Towers Watson report.⁶ Organizations are planning to increase their use of MSS systems because HR knows that MSS can decrease cycle time and increase accuracy for HR transactions. In addition, managers appreciate being able to handle transactions on their own, and HR knows the work is being taken care of.

"Improved processes empower manager and HR discretion. From our perspective, the best way to change an organization is to redefine its underlying business processes. HR is well served by trusting managers to handle these processes at the lowest level possible," Towers Watson states. "We've observed that with greater MSS capabilities, HR has relaxed its controls somewhat and is more comfortable, in the majority of cases, with simple notification for basic transactions such as goal setting, transfers and voluntary terminations."⁷

In some organizations, managers have been reluctant to take on duties that HR had handled until they recognized the benefits, including easier access to workforce data for quicker decision-making. MSS technology has also improved. Instead of being add-ons to HRIS, MSS systems are increasingly embedded in HRIS, and user-friendly tools such as on-screen guidance have been added. Usability increases adoption and acceptance. Online access to MSS provides real-time access 24/7, enabling managers to catch up on tasks after work hours.

Highly regulated industries such as health care or financial services also find compliance benefits in MSS systems that create easily accessed databases for generating reports on compliance-related data. In addition, many of these regulated industries are subject to audits, and MSS systems provide detailed process documentation facilitating audit trails. See Making the Most of Manager Self-Service. (www.shrm.org/hr-today/news/hr-magazine/Pages/1213-manager-self-service.aspx)

Organizations may determine the number and complexity of HR tasks in the MSS. For example, managers could authorize merit increases, promotions and transfers; approve leave requests; change an employee's classification; and conduct performance management, succession planning and onboarding. See Designing and Managing a Human Resource Information System. ([/ResourcesAndTools/tools-and-samples/toolkits/Pages/managingahumanresourceinformationsystem.aspx](http://ResourcesAndTools/tools-and-samples/toolkits/Pages/managingahumanresourceinformationsystem.aspx))

Legal Issues

One of the key legal issues facing HR professionals who rely heavily on ESS and MSS systems for data storage and sharing is how to protect sensitive data, such as medical and financial information, performance notes, disciplinary actions, and other personnel information that only managers and HR should have access to. In addition to proper use of such active data, HR must consider secure disposal of the information when it is no longer needed.

Disposing of sensitive information

In an effort to protect the privacy of consumer information and reduce the risk of fraud and identity theft, the Fair and Accurate Credit Transactions Act, enacted in 2003, directed several federal agencies to adopt rules regarding the disposal of sensitive information. In addition, the Federal Trade Commission's (FTC's) Disposal Rule became effective in 2005.

"Companies that fail to educate themselves and comply with these laws governing the secure disposal of sensitive information face significant risks of regulatory investigations, fines, potential civil lawsuits, bad publicity and brand damage,"⁸ said Al Saikali, an attorney and co-chair of Shook Hardy & Bacon's Data Security and Data Privacy Practice Group, based in Miami. "Also, it simply makes good business sense that a company would want to ensure the security of [its] proprietary, consumer, employee and other sensitive information."

According to the FTC, the standard for the proper disposal of information derived from a consumer report is flexible and allows the organizations and individuals covered by the rule to determine what measures are reasonable based on the sensitivity of the information, the costs and benefits of different disposal methods, and changes in technology.

Although the Disposal Rule specifically applies to consumer reports and the information derived from consumer reports, the FTC encourages those who dispose of any records containing a consumer's personal or financial information to take similar protective measures.

The rule does not specify for employers the length of time such records must be maintained or whether they must be destroyed at all.

FTC-recommended disposal practices include destroying or erasing electronic files so that consumer information cannot be read or reconstructed.

HR should identify the policies and procedures the employer has adopted to ensure that sensitive information is disposed of securely. The law contains a subpart specifically focused on the implementation and monitoring of policies and procedures that deal with the destruction of materials. Organizations should make sure every employee is aware of requirements. See Know Your Records Disposal Responsibilities. (www.shrm.org/ResourcesAndTools/hr-topics/risk-management/Pages/Records-Disposal-Responsibilities.aspx)

Communications

Employers are adopting new collaboration technologies, including social media tools and videos, to support employee communications for open enrollment. But they still rely most heavily on e-mail.

Some providers of online enrollment technology are adding communication features to their platforms. For example, vendors may offer a messaging center that allows employees to ask questions privately or publicly. Portals may use videos, podcasts or webinars to push communications to employees. Instant messaging features allow employees to talk to specialists in real time.

Metrics

In a world where what matters gets measured, many HR executives turn to sophisticated analytics to help gauge their department's strategic contribution. Next-generation tools enable HR and business managers to make predictive correlations between traditional HR metrics and the business outcomes they are expected to achieve—such as the impact of a mentoring program on performance. Some organizations underscore the importance of such metrics by displaying them front and center in a dashboard format. ESS portals can include dashboards for employees to track progress against goals. For example, if an organization requires a certain amount of training per year, employees can check the portal to verify progress without having to disturb human resources.

Security

Installing the appropriate security features in the ESS should be one of the top priorities to properly handle. Areas to consider include:

- Security of sensitive electronically stored information such as payroll and benefits data.
- Loss prevention of sensitive personnel data outside the organization (such as Social Security numbers).
- Unauthorized updates of key data such as salaries and stock options (quantity and dates).
- Sharing of personnel or applicant review—comments to unauthorized employees.
- Sharing of data with unauthorized employees, external organizations and service providers.
- Identity theft and other cyber-crimes.

Human resources should have protocols developed to respond to security breaches or the unintended exposure of sensitive information. In addition, as identity theft becomes more prevalent, human resources should be prepared to assist employees who report identity theft to ensure their information is updated and secured.

Global Issues

ESS and MSS systems are beneficial for all HR departments and organizations, but they can provide particular benefits for global organizations that are managing a variety of business units and skill sets across multiple countries and cultural groups.

Personalization

Personalization has distinct advantages for global organizations. ESS portals can be customized based on employee locations. For example, employees in Brazil or Belgium do not have to cut through the underbrush of benefits information meant for U.S. workers to find content they need, and local policies based on differing regulations or cultural practices can be addressed.

Though global portals can pay off in terms of a unified culture, improved communication and consistency across borders, their complexity can be challenging. Issues such as multiple language requirements, privacy concerns and different technology platforms mean global employee portals must be carefully designed and managed to reach their potential.

Steps organizations can take to ensure their portals provide the results they seek include:

- **Define or redefine portal objectives.** Clear goals for the portal are critical, and they must be communicated to every stakeholder. Is the portal's primary purpose to communicate with employees? Enable self-service? Create a unified culture? All of the above? By defining the chief goals at the outset, portal design and processes can be aligned to support the objectives of global organizations.
- **Revisit governance structures.** In many organizations, thousands of people are making content and process decisions, often in silos. Turf wars and poor communication result in redundant content and a proliferation of subsites that are too unwieldy for employees to navigate. The solution is to create a governance structure that clearly defines roles, processes and standards for the portal. Examples of issues to be addressed include the following: Who decides what content should be included? Who ensures the portal reflects the organization's brand? Who decides which self-service capabilities should be offered? Who ensures the site reflects the totality of the organization, not just the view from headquarters? Who helps navigate the nuances of cultural differences when it comes to presenting content?
- **Make it personal.** Personalization has been a hot topic for domestic portals, and it is even more critical for global portals. Personalization allows employees to see only the information relevant to them. Although some information will be appropriate for global distribution, other material may be better suited for regional or local delivery.
- **Brush up on privacy law.** Global portals must take into consideration the different privacy laws in effect in different jurisdictions. For example, it may be standard practice to include staff directories on U.S. portals, but doing the same thing in Europe may be considered a breach of data privacy laws, depending on the circumstances. Reviewing content categories with legal professionals familiar with the laws in each country from which employees will access the portal is important to ensure compliance.
- **Keep it fresh.** One challenge is ensuring that content is kept up-to-date. For example, if organizations have multiple open enrollment cycles in different geographies, there should be a schedule and designated person to ensure the content is kept up-to-date throughout the year.

Global portals offer the potential for significant cost, efficiency and employee satisfaction benefits, but they must be actively managed for those benefits to be realized. New developments in the portal industry as well as lessons learned from previous governance missteps mean most organizations can benefit from reviewing their current portals and strategies to identify and correct areas in need of improvement.

Templates and Tools

Samples

Job descriptions

Analyst, Human Resources System (/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_001068.aspx#P-4_0)

Associate HRIS Analyst (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_009916.aspx#P-4_0)

HRIS Analyst (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_009917.aspx#P-4_0)

HRMS Manager (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_001290.aspx#P-4_0)

HRMS Support Specialist (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_001291.aspx#P-4_0)

Sr. HRIS Analyst (www.shrm.org/ResourcesAndTools/tools-and-samples/job-descriptions/Pages/cms_009915.aspx#P-4_0)

Policies

Social Security Numbers: Safeguarding (www.shrm.org/ResourcesAndTools/tools-and-samples/policies/Pages/cms_015266.aspx)

Technology: Use of Company Property Policy (www.shrm.org/ResourcesAndTools/tools-and-samples/policies/Pages/cms_000558.aspx)

Record Retention: Electronic (www.shrm.org/resourcesandtools/tools-and-samples/policies/pages/cms_021285.aspx)

Computer Passwords (www.shrm.org/ResourcesAndTools/tools-and-samples/policies/Pages/passwordpolicy.aspx)

Information tools

How to Select an HRIS (www.shrm.org/ResourcesAndTools/tools-and-samples/how-to-guides/Pages/howtoselectanhrissystem.aspx)

Educational tools

Transforming HR Through Technology; Leveraging HR Technology for Competitive Advantage ([/about/foundation/products/Pages/HRTechEPG.aspx](http://about.foundation/products/Pages/HRTechEPG.aspx))

Systems of Engagement Serve Employee Enterprisewide (www.shrm.org/hr-today/news/hr-magazine/Pages/0814-hris-user-experience.aspx)

Endnotes

¹Towers Watson. (2013). *Explore the possibilities, seize the moment: 2013 HR service delivery and technology survey executive summary report*. Retrieved from <https://www.towerswatson.com/DownloadMedia.aspx?media=%7B9E608931-5D38-4401-9C2D-AAD3F5B650D8%7D> (www.shrm.orghttps://www.towerswatson.com/DownloadMedia.aspx?media=%7B9E608931-5D38-4401-9C2D-AAD3F5B650D8%7D)

²Ibid.

³Ibid.

⁴Zielinski, D. (2011, October 19). HRISs get bells and whistles. *SHRM Online*. Retrieved from <http://www.shrm.org/hrdisciplines/technology/articles/pages/hrisupdate.aspx> (www.shrm.org/ResourcesAndTools/hr-topics/technology/Pages/HRISUpdate.aspx)

⁵Ibid.

⁶Towers Watson. (2013). *Explore the possibilities, seize the moment: 2013 HR service delivery and technology survey executive summary report*. Retrieved from <https://www.towerswatson.com/DownloadMedia.aspx?media=%7B9E608931-5D38-4401-9C2D-AAD3F5B650D8%7D> (<https://www.towerswatson.com/DownloadMedia.aspx?media=%7b9E608931-5D38-4401-9C2D-AAD3F5B650D8%7d>)

⁷Ibid.

⁸Maurer, R. (2013, March 19). Know your records disposal responsibilities. *SHRM Online*. Retrieved from <http://www.shrm.org/hrdisciplines/safetysecurity/articles/Pages/Records-Disposal-Responsibilities.aspx> ([/ResourcesAndTools/hr-topics/risk-management/Pages/Records-Disposal-Responsibilities.aspx](http://www.shrm.org/hrdisciplines/safetysecurity/articles/Pages/Records-Disposal-Responsibilities.aspx))

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