

Automating Employee Document Management

How DynaFile and Paylocity Simplify Secure Employee File Management

Challenge: HR Systems Are Digital. Employee Documents Are Still Disconnected.

Paylocity provides organizations with a powerful platform to manage payroll, HR, benefits, and workforce data. But even with a modern HRIS in place, many teams still struggle with how employee documents are stored, organized, and accessed.

Common challenges include:

- Employee documents are stored outside the HRIS in shared drives or inboxes
- Manual downloading and uploading of files tied to HR workflows
- Inconsistent file naming and folder structures across departments
- Limited visibility during audits or compliance reviews
- Increased risk of missing, misfiled, or overexposed records

While Paylocity serves as the system of record for employee data, organizations still need a secure, structured way to manage the documents associated with that data without adding manual work for HR teams.

The Solution: A Seamless Integration Between DynaFile and Paylocity

The integration between DynaFile and Paylocity connects trusted HRIS data with a cloud-based document management system purpose-built for employee records.

Together, they create a streamlined approach where:

- Paylocity manages employee data and workforce operations
- DynaFile manages employee documents, compliance, and retention
- Teams eliminate manual file handling and improve consistency

DynaFile complements Paylocity by acting as the system of record for employee files, ensuring documents are organized, secure, and audit-ready throughout the employee lifecycle.

“Integrating DynaFile with platforms like Paylocity allows organizations to connect trusted HR data with secure document management. The goal is simple: reduce manual work, improve consistency, and give teams confidence in how employee records are managed.”

–Brian McCleary

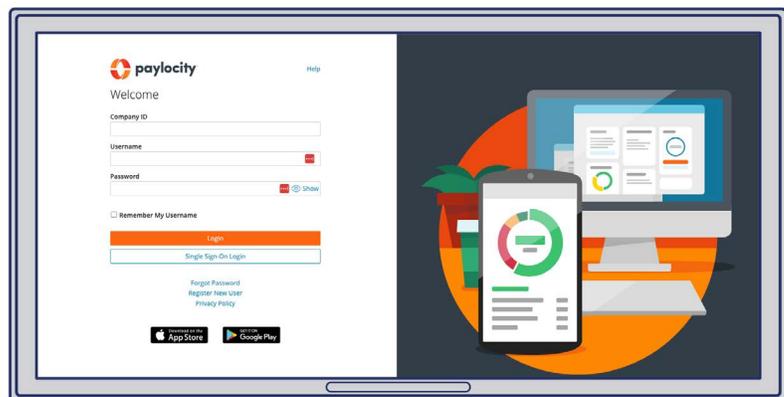
VP of Operations at DynaFile

How the Integration Works: A Streamlined Workflow from Paylocity to DynaFile

The DynaFile and Paylocity integration creates an automated bridge between your HR platform and your document repository, without complex setup or disruption to existing workflows.

1 Employee Data from Paylocity Automatically Structures DynaFile Folders

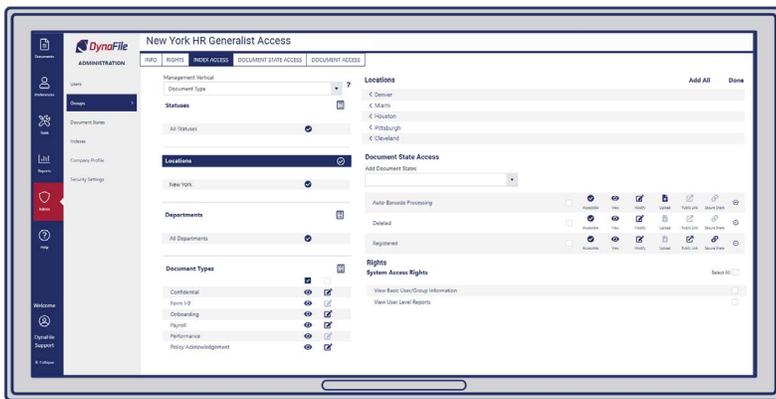
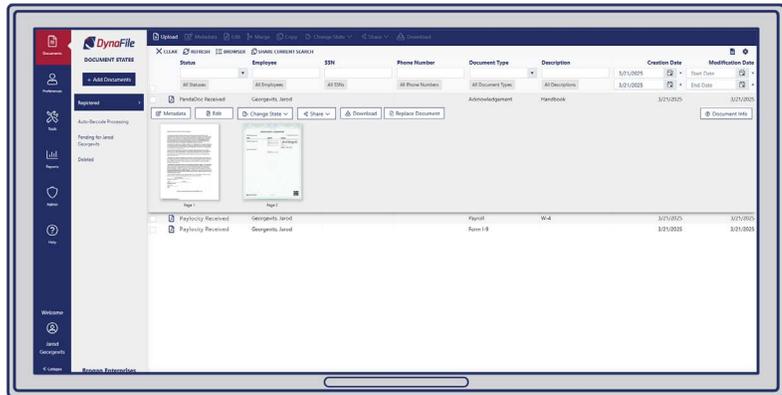
Employee information from Paylocity automatically populates employee folders in DynaFile, ensuring every document is tied to the correct employee record from day one.



2 Employee Documents Are Automatically Organized

Documents generated by Paylocity workflows are routed directly to standardized employee folders in DynaFile. Files are categorized by employee, document type, or retention requirement, eliminating the need for manual naming and sorting.

Example: When a new hire completes onboarding in Paylocity, their W-4, I-9, and direct deposit forms are automatically filed in their DynaFile employee folder.



3 Secure, Manage, and Retrieve with Confidence

DynaFile provides role-based access controls and document-level permissions, allowing HR teams across all industries to quickly find documents, monitor compliance status, and maintain clear audit trails while protecting sensitive employee information.

What This Enables Across Teams

By integrating Paylocity with DynaFile, organizations gain:

- Eliminate manual document handling tied to HRIS workflows
- Maintain consistent employee file structures across departments
- Improve audit readiness and compliance confidence
- Control access to sensitive employee records
- Support secure access for distributed and multi-location teams

Designed for Flexibility and Scale

The DynaFile and Paylocity integration adapts to how organizations already work, supporting a wide range of industries including education, healthcare, legal, real estate, and beyond.

- No disruption to payroll or HR operations
- No rigid folder structures or one-size-fits-all configurations
- Custom file structures aligned to internal policies and industry requirements

As organizations grow or expand into new locations, DynaFile scales with Paylocity to keep employee records secure.

Ready to Simplify Employee Document Management?

Whether you are already using Paylocity or optimizing your broader HR ecosystem, DynaFile helps you centralize employee documents, reduce compliance risk, and improve operational efficiency.

Explore the DynaFile and Paylocity integration

[Schedule a personalized demo today!](#)