



## Case Study

# From Manual Workflows to Automated Efficiency: How Houchens Insurance Group Transformed HR Document Management with DynaFile + Paylocity

**Client Name:**

Houchens Insurance Group

**Industry:**

Insurance

**Company Size:**

489

**Location:**

Bowling Green, KY  
(corporate office)

**Integrations:**

Paylocity



DynaFile is the industry-leading electronic employee filing system tailored for human resource departments. With robust cloud document management solutions, businesses can streamline processes through scanning automation, online file storage, cloud collaboration, a compliance toolkit, and automated onboarding integrations. Unique scanning automation tools allow you to take an entire department paperless fast. From there, powerful management features make it easy to organize information, retrieve files instantly, segment access and keep track of required and expiring documents.

Houchens Insurance Group (HIG) is an employee-owned insurance organization headquartered in Bowling Green, Kentucky. Formed through the integration of five legacy agencies, the company has grown into a diversified insurance partner serving businesses and individuals across all 50 states, combining local relationships with national reach to deliver tailored insurance solutions at scale.

### Challenge

Before leveraging DynaFile's integration with Paylocity, HIG relied on manual, multi-step processes to manage employee documentation. HR teams retrieved documents individually from Paylocity, saved files locally, uploaded them into DynaFile, and tracked completion across systems.

This process was time-consuming and often frustrating, creating unnecessary administrative burden, increasing the risk of errors, delaying access to employee records, and limiting the ability to scale workflows across a growing workforce.

Even routine initiatives such as company-wide handbook acknowledgments became labor-intensive. What required mass emails, Excel tracking, and the individual uploading of each signed document became a time-intensive project for the HR team.

### Solution

By integrating DynaFile with Paylocity, Houchens Insurance Group transformed its document management process from manual to fully automated.

DynaFile now automatically pulls completed employee new hire documents from Paylocity, creates and organizes employee folders, and files onboarding documents, job descriptions, and acknowledgments in real time. This eliminates the need for manual document retrieval and upload while ensuring documents are consistently filed, accurate, and immediately accessible.

A major breakthrough came during a recent handbook acknowledgment rollout. What was once a manual, spreadsheet-driven process involving mass emails, Excel tracking, and individual uploads became fully automated, saving hours of effort and eliminating repetitive administrative work.

DynaFile's multi-employee file view further improved efficiency by allowing HR staff to view and compare documents across multiple employee folders at once, making it easier to locate and verify records without switching between files.

***"The DynaFile + Paylocity integration has transformed our document management by automating time-consuming tasks, reducing errors, and speeding up processes.***

***It's a game-changer for efficiency and accuracy, allowing us to focus on more strategic work.***

***-Jordan Meador, Talent and Culture Business Partner***

## Results

The DynaFile + Paylocity integration delivered measurable efficiency gains across HIG's HR operations.

Prior to the DynaFile + Paylocity integration, manually pulling, organizing, and filing onboarding documents for 96 new hires represented approximately 48 hours of administrative effort annually. Today, the process is largely automated, reducing HR document handling and filing time to 10 minutes or less per employee while improving efficiency and reducing the risk of errors.

These efficiencies scale across HIG's nearly 500-employee workforce, freeing HR teams to focus on more strategic, high-impact initiatives while improving overall workflow speed, accuracy, and consistency.

HIG has also created a more scalable and efficient system for managing employee records and is planning to expand its use of DynaFile to automate additional high-volume processes, including annual training certificate management.



*“The biggest benefit DynaFile has provided is eliminating the need for manually pulling and uploading documents, which has greatly streamlined our workflow and saved us valuable time.”*

*–Jordan Meador,  
Talent and Culture Business Partner*

## Key Features and Benefits

- **Paylocity Integration**  
Automates document syncing and filing directly from Paylocity into DynaFile
- **Automated New Hire File Creation**  
Ensures faster, consistent, and error-free onboarding
- **Bulk Document Processing**  
Simplifies large-scale initiatives like handbook acknowledgments
- **Multi-Employee File View**  
Allows HR teams to compare and retrieve documents across multiple employee records
- **Standardized File Organization**  
Improves consistency, compliance, and document accuracy
- **Reduced Manual Data Entry**  
Minimizes errors while increasing efficiency across HR workflows