

Automating HR Document Workflows:

How DynaFile and PandaDoc Deliver a Fully Digital Employee Lifecycle

HR departments today face increasing pressure to streamline processes, ensure compliance, and eliminate inefficiencies tied to manual paperwork. In response, DynaFile—an industry leader in HR document management—has partnered with PandaDoc, a best-in-class provider of document automation and eSignature solutions, to deliver a powerful integration that transforms the way HR teams manage documents. This partnership empowers organizations to automate every step of the document lifecycle—from creation and signing to secure storage and compliance tracking.

Challenge

Despite the availability of digital solutions, many HR teams still rely on paper-based processes for onboarding, performance reviews, policy acknowledgments, and compliance documentation. These outdated workflows are time-consuming, error-prone, and difficult to scale—especially across remote or hybrid teams.

The result? Lost productivity, higher compliance risk, and delays that impact both HR teams and new hires alike.

The Solution: A Seamless, End-to-End HR Document Workflow

The integration between DynaFile and PandaDoc brings together the strengths of both platforms to eliminate paper and reduce manual workloads. Here's how it works:

- **Create & Send:** HR teams use PandaDoc to build and send customized documents—such as onboarding forms, benefit applications, and performance evaluations—using dynamic templates and built-in eSignature capabilities.
- **Sign & Complete:** Employees review and eSign documents securely and legally from any device, enabling faster turnaround times.
- **Auto-File & Organize:** Once signed, documents are automatically routed and filed into the employee's secure folder in DynaFile—no manual uploading or naming required.
- **Manage & Monitor:** DynaFile's cloud-based system allows HR staff to store, manage, and retrieve documents with ease. Built-in compliance tools send alerts for missing or expiring documents, helping teams stay audit-ready.

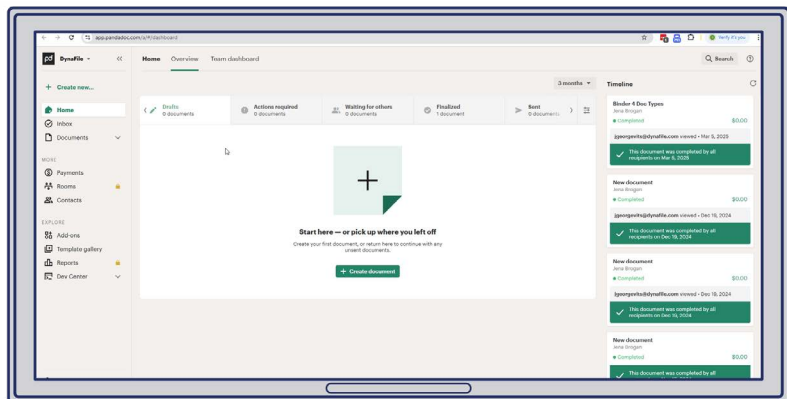
“This integration will enable our customers to streamline their document management and automation processes, making them more productive.”

—Brian McCleary | VP of Operations at DynaFile

See It in Action: A Streamlined, Paperless Workflow from PandaDoc to DynaFile

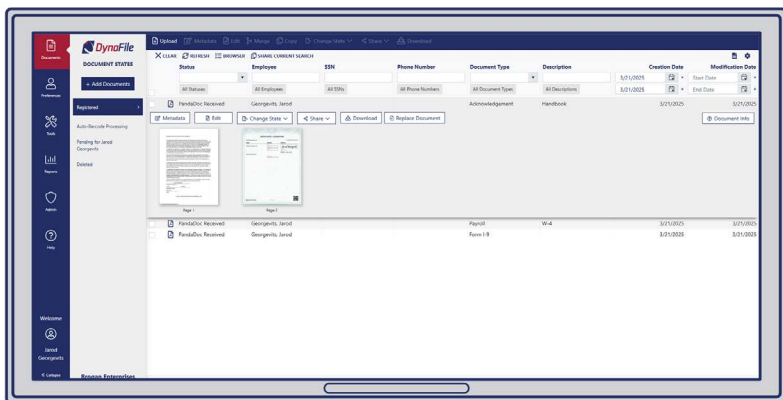
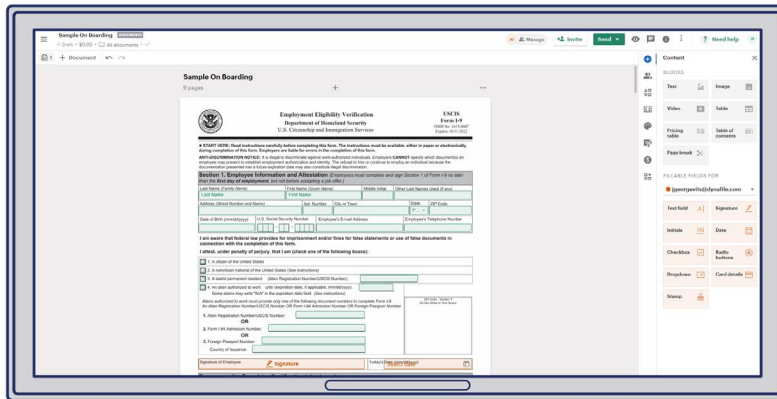
Our plug-and-play integration with PandaDoc makes it easy to build, send, sign, and store HR documents with zero manual filing. The integration works seamlessly with any PandaDoc subscription tier—no complex setup required. Together, PandaDoc and DynaFile deliver a truly digital employee lifecycle from day one.

- 1 **Build and Send from PandaDoc**
Quickly create onboarding packets, offer letters, or policy forms using PandaDoc's intuitive dashboard and reusable templates.



2 Add Dynamic Fields for Seamless Completion

Insert customizable fields like names, dates, signatures, and checkboxes to ensure accuracy and speed up the signing process.



3 Automatically File into DynaFile

Once signed, documents are automatically and securely filed in the correct employee folder in DynaFile—no uploading required.

Real-World Impact: Paul Mitchell School of Rexburg, ID

Paul Mitchell School of Rexburg implemented DynaFile with PandaDoc to overcome the inefficiencies of manual HR filing. According to Lindsey Yearsley, Financial Aid Leader, the transformation was immediate:



“Having online files that can be accessed from anywhere—and having PandaDoc automatically import signed forms—has been amazing. This saves us a ton of time having to upload files. The ability to preview the files when uploading them makes it easier to double check them and make sure they go into the correct file.”

—Lindsey Yearsley | Financial Aid Leader Paul Mitchell School, Rexburg, ID

Since adopting the integrated system, the school saw a **100% increase in filing efficiency**. Their HR team now benefits from remote file access, automated onboarding workflows, and seamless integration with PandaDoc and DocuSign.

Why It Matters Now

As HR teams continue to navigate remote work, growing compliance requirements, and the need for faster hiring, automated workflows are no longer a nice-to-have—they’re a necessity. By partnering together, DynaFile and PandaDoc offer an integrated, user-friendly solution that modernizes document management while saving time and increasing productivity.

Ready to Go Paperless?

Explore how the DynaFile + PandaDoc integration can help your HR team reduce paperwork, boost compliance, and reclaim valuable time.

[Schedule a demo today](#)

“This is a great example of two companies working together to provide a better experience for our customers”

—Brock Kane

Director of New Business Development at DynaFile