# Payroll Transition Checklist

Follow this checklist to make sure you have everything in place to switch to a new payroll provider.

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|  | **TASKS** | **DATE (MM/DD/YYYY)** |
| **EVALUATE CURRENT PAYROLL PROVIDER** | | |
|  | Determine favorite features |  |
|  | Evaluate budget |  |
|  | Discuss pain points |  |
|  | Create a list of required features |  |
| **COMPARE CURRENT PAYROLL VS OTHER PAYROLL PROVIDERS** | | |
|  | Services & add-ons |  |
|  | Growth potential |  |
|  | Third-party integrations |  |
|  | Pricing |  |
|  | Off-cycle payrolls |  |
|  | Support Availability |  |
|  | Training |  |
|  | User Reviews |  |
|  | Employee self-service portal |  |
|  | Mobile app |  |
| **CHOOSE A NEW PAYROLL SERVICE & DECIDE WHEN TO SWITCH** | | |
|  | Choose a new payroll provider |  |
|  | Determine switch date   * End of quarter * End of year |  |
| **ARRANGE SET UP WITH YOUR NEW PAYROLL SERVICE** | | |
|  | Provide access to your current payroll data |  |
|  | Send payroll documents   * Federal tax info * Tax forms * Payroll registration information * Bank account information * Current employee list and information * Payroll information * Terminated employee information * Third-party authorizations |  |
|  | Prep software to sync with the new system |  |
|  | Establish and provide year-end tax filing instructions |  |
| **NOTIFY EMPLOYEES ABOUT NEW PAYROLL SERVICE** | | |
|  | Send a new payroll system announcement |  |
|  | Train employees   * New employee interface * Mobile app * New employee accounts * Pay card program * New benefits sign-ups |  |
| **CUT TIES WITH FORMER PAYROLL PROVIDER** | | |
|  | Send written notice |  |
|  | Request copies of records |  |
|  | Check for pending transactions |  |
|  | Ensure you are no longer being billed |  |
|  | Cancel authorizations |  |