

Payroll Transition Checklist

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

	TASKS	DATE (MM/DD/YYYY)
EVALUATE CURRENT PAYROLL PROVIDER		
<input type="checkbox"/>	Determine favorite features	
<input type="checkbox"/>	Evaluate budget	
<input type="checkbox"/>	Discuss pain points	
<input type="checkbox"/>	Create a list of required features	
COMPARE CURRENT PAYROLL VS OTHER PAYROLL PROVIDERS		
<input type="checkbox"/>	Services & add-ons	
<input type="checkbox"/>	Growth potential	
<input type="checkbox"/>	Third-party integrations	
<input type="checkbox"/>	Pricing	
<input type="checkbox"/>	Off-cycle payrolls	
<input type="checkbox"/>	Support Availability	
<input type="checkbox"/>	Training	
<input type="checkbox"/>	User Reviews	
<input type="checkbox"/>	Employee self-service portal	
<input type="checkbox"/>	Mobile app	
CHOOSE A NEW PAYROLL SERVICE & DECIDE WHEN TO SWITCH		
<input type="checkbox"/>	Choose a new payroll provider	

<input type="checkbox"/>	Determine switch date <input type="checkbox"/> End of quarter <input type="checkbox"/> End of year	
ARRANGE SET UP WITH YOUR NEW PAYROLL SERVICE		
<input type="checkbox"/>	Provide access to your current payroll data	
<input type="checkbox"/>	Send payroll documents <input type="checkbox"/> Federal tax info <input type="checkbox"/> Tax forms <input type="checkbox"/> Payroll registration information <input type="checkbox"/> Bank account information <input type="checkbox"/> Current employee list and information <input type="checkbox"/> Payroll information <input type="checkbox"/> Terminated employee information <input type="checkbox"/> Third-party authorizations	
<input type="checkbox"/>	Prep software to sync with the new system	
<input type="checkbox"/>	Establish and provide year-end tax filing instructions	
NOTIFY EMPLOYEES ABOUT NEW PAYROLL SERVICE		
<input type="checkbox"/>	Send a new payroll system announcement	
<input type="checkbox"/>	Train employees <input type="checkbox"/> New employee interface <input type="checkbox"/> Mobile app <input type="checkbox"/> New employee accounts <input type="checkbox"/> Pay card program <input type="checkbox"/> New benefits sign-ups	
CUT TIES WITH FORMER PAYROLL PROVIDER		
<input type="checkbox"/>	Send written notice	
<input type="checkbox"/>	Request copies of records	
<input type="checkbox"/>	Check for pending transactions	
<input type="checkbox"/>	Ensure you are no longer being billed	
<input type="checkbox"/>	Cancel authorizations	