



HRIS Implementation Checklist Template

Planning & Requirements Gathering

Defining project scope, goals, and user requirements.

Project Goals & Objectives

Write something...

Estimated Number of Users

Enter a number...

Current HR Processes (e.g., manual, semi-automated)

- Manual
- Semi-Automated
- Fully Automated

Key Modules Required (e.g., Core HR, Payroll, Benefits)

- Core HR
- Payroll
- Benefits
- Talent Acquisition
- Performance Management
- Learning Management

Target Go-Live Date

Enter date...

Specific Integration Requirements (e.g., Payroll System)

Write something...

Vendor Selection & Contract Negotiation

Evaluating and selecting an HRIS vendor and negotiating contract terms.

Define Selection Criteria

Write something...

Budget Allocation (USD)

Enter a number...


Preferred Deployment Model (Cloud, On-Premise, Hybrid)

- Cloud
- On-Premise
- Hybrid

Key Features Required

- Payroll Integration
- Benefits Administration
- Applicant Tracking
- Performance Management
- Learning Management

Request for Proposal (RFP) Document

 Upload File

RFP Submission Deadline

Enter date...

Data Migration & Cleansing

Planning and executing the migration of data from legacy systems, including data cleansing and validation.


Describe data cleansing rules

Write something...

Number of employee records to migrate

Enter a number...

Sample data extract for validation

 Upload File

Data mapping source to target field

- Employee ID
- First Name
- Last Name
- Email
- Department

Date of last data extract

Enter date...

Details of data validation performed

Write something...

System Configuration & Customization

Configuring the HRIS system to meet specific business needs, including workflows, security settings, and user roles.

Default Currency

- USD
- EUR
- GBP
- CAD

Maximum Upload File Size (MB)

Enter a number...

Default Workflow Statuses

- Draft
- Pending Approval
- Approved
- Rejected

Default Language

- English
- Spanish
- French

Date Format

Enter date...

Custom Branding Instructions

Write something...

Integration with Existing Systems

Integrating the HRIS with other systems, such as payroll, accounting, and time and attendance.

Payroll System Integration?

- Yes
- No
- Planned

Time & Attendance System Integration?

- Yes
- No
- Planned

Number of Records to be Integrated

Enter a number...

Scheduled Integration Start Date

Enter date...

Description of Integration Approach

Write something...

Data Mapping Verification Status

- Not Started
- In Progress
- Completed

Integration Test Data File (if applicable)

 Upload File

User Training & Documentation

Developing training materials and providing training to users on how to use the new system.

Training Material Outline

Write something...

Training Presentation (PowerPoint/PDF)

 Upload File

Number of Employees Trained

Enter a number...

Training Completion Deadline

Enter date...

Training Delivery Method (e.g., Online, In-Person, Hybrid)

- Online
- In-Person
- Hybrid

Topics Covered in Training

- System Navigation
- Data Entry
- Reporting
- Security Protocols

User Feedback Summary

Write something...

Testing & Quality Assurance

Thoroughly testing all aspects of the system to ensure functionality and accuracy.

Functional Area Tested (e.g., Payroll, Benefits, Performance)

- Payroll
- Benefits
- Performance Management
- Recruiting
- Compensation
- Time & Attendance

Number of Test Cases Executed

Enter a number...

Number of Test Cases Passed

Enter a number...

Number of Test Cases Failed

Enter a number...

Detailed Description of Failed Test Cases (Include steps to reproduce)

Write something...

Severity of Critical Errors (If Any)

- Low
- Medium
- High

Date of Testing Completion

Enter date...

Tester Signature

Go-Live Planning & Execution

Developing a detailed plan for the system launch and executing the go-live process.

Planned Go-Live Date

Enter date...

Scheduled Downtime Window (Start)

Scheduled Downtime Window (End)

Number of Support Staff Available on Go-Live

Enter a number...

Communication Plan for Employees (Go-Live Announcement)

Write something...

Rollback Strategy Selected

- Full Rollback
- Partial Rollback
- No Rollback Strategy

Go-Live Checklist Document

 Upload File

Go-Live Readiness Sign-Off

- Approved
- Needs Review
- Rejected

Post-Implementation Support & Optimization

Providing ongoing support to users and optimizing the system based on feedback and performance data.

Average User Satisfaction Score (1-5)

Enter a number...

Common User Issues Encountered

- Navigation Difficulties
- Reporting Errors
- Data Entry Problems
- Workflow Disruptions
- Mobile Access Issues

User Feedback Summary (past week)

Write something...

Date of Last System Optimization Meeting

Enter date...

Overall System Performance (Excellent, Good, Fair, Poor)

- Excellent
- Good
- Fair
- Poor

Summary of Optimization Actions Taken

Write something...

Security and Compliance

Ensuring the HRIS meets all relevant security and compliance requirements.

Compliance Framework (e.g., GDPR, CCPA)

- GDPR
- CCPA
- HIPAA
- Other (Specify)

Data Security Policies Description

Write something...

Data Encryption Strength (e.g., 128-bit, 256-bit)

Enter a number...

Access Control Measures Implemented

- Role-Based Access
- Multi-Factor Authentication
- Principle of Least Privilege
- Regular Access Reviews

Last Security Audit Date

Enter date...

Incident Response Plan Summary

Write something...

Data Residency Requirements

- No Specific Requirements
- Data must reside in [Country/Region]