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Payroll migration checklist

A step-by-step companion for ASOs and payroll bureaus switching payroll platforms — from discovery through go-live, without disrupting clients.

01 Discovery — inventory your current environment

- [ ] Active clients
- [ ] FEINs
- [ ] Payroll frequencies
- [ ] Employee counts
- [ ] Tax jurisdictions
- [ ] Benefit plans
- [ ] Garnishments
- [ ] Direct deposit configurations
- [ ] General ledger mappings
- [ ] Custom reports
- [ ] Integrations
- [ ] Time and attendance systems

02 Clean your data before migration

- [ ] Duplicate employee records
- [ ] Inactive employees
- [ ] Outdated tax settings
- [ ] Incorrect deduction codes
- [ ] Bank account information
- [ ] Department structures
- [ ] Earnings and deduction mappings
- [ ] Security roles
- [ ] Client configurations

03 Plan historical data migration

- [ ] Employee master records
- [ ] Tax elections
- [ ] Direct deposit information
- [ ] Earnings history
- [ ] Deduction balances
- [ ] PTO balances
- [ ] Benefit enrollments
- [ ] Year-to-date (YTD) totals
- [ ] Employer tax information

04 Validate year-to-date (YTD) balances

- [ ] Gross wages
- [ ] Federal withholding
- [ ] State withholding
- [ ] Local taxes
- [ ] Social Security wages
- [ ] Medicare wages
- [ ] Employer taxes
- [ ] Benefit deductions
- [ ] Employer contributions
- [ ] Paid time off balances

05 Conduct parallel payroll runs

- [ ] Gross pay
- [ ] Net pay
- [ ] Taxes
- [ ] Benefits
- [ ] Garnishments
- [ ] PTO calculations
- [ ] Employer taxes
- [ ] Payroll journals
- [ ] Direct deposits

06 Test every integration

- [ ] Time and attendance
- [ ] HRIS
- [ ] Benefits administration
- [ ] Accounting systems
- [ ] Banking
- [ ] Applicant tracking
- [ ] Expense management
- [ ] Single Sign-On (SSO)
- [ ] APIs
- [ ] Third-party reporting

07 Create a client communication plan

- ▢ Why the change is happening
- ▢ Expected benefits
- ▢ Project timeline
- ▢ Important milestones
- ▢ Required client actions
- ▢ Training opportunities
- ▢ Support contacts
- ▢ Go-live schedule

08 Train internal teams first

- ▢ Payroll processing
- ▢ Tax administration
- ▢ Reporting
- ▢ Client administration
- ▢ Employee self-service
- ▢ Troubleshooting
- ▢ Security administration

09 Roll out in phases

- ▢ By client size
- ▢ By payroll frequency
- ▢ By industry
- ▢ By geographic region
- ▢ By implementation readiness

10 Provide enhanced support during go-live

- ▢ Extended support hours
- ▢ Dedicated implementation contacts
- ▢ Daily project check-ins
- ▢ Priority issue escalation
- ▢ Payroll review sessions
- ▢ Executive oversight

SELECTION CRITERIA

Choosing a migration partner

When evaluating vendors, ask about:

- ▢ Dedicated implementation managers
- ▢ Proven migration methodology
- ▢ Payroll conversion experience
- ▢ Data migration tools
- ▢ Parallel testing processes
- ▢ Tax migration expertise
- ▢ Client training resources
- ▢ Post-go-live support
- ▢ Service Level Agreements (SLAs)
- ▢ References from similar ASOs or bureaus

GO-LIVE GATE

Migration readiness checklist

Before processing your first production payroll, confirm each item below.

- ▢ Client data validated
- ▢ Employee records migrated
- ▢ Year-to-date balances reconciled
- ▢ Tax settings verified
- ▢ Direct deposit information confirmed
- ▢ Benefit deductions tested
- ▢ Integrations validated
- ▢ Parallel payrolls successfully completed
- ▢ Internal teams trained
- ▢ Client communications delivered
- ▢ Support resources prepared
- ▢ Go-live approval received