NEOGOV

Your HRIS Implementation Checklist

Ready to invest in a Human Resources Information System (HRIS) for your agency? Use this 4-stage HRIS Implementation Checklist to guide you and your team towards a successful launch in your new system.

Disclaimer: Please note that this checklist is not all-encompassing and the timelines listed are estimates. Each HRIS solution and their requirements are different, so it's important that you work closely with your software provider to ensure proper preparation for a seamless implementation.

STAGE 1: PLANNING

2–4 weeks

Set expectations for your implementation project plan, assign specific tasks to individuals on your implementation team, and notify stakeholders and leadership about your implementation launch.

Tip: During this time, ask your HRIS provider **as many questions as you can** to avoid delays or confusion later.

- ☐ Hold a kick-off meeting with your implementation team
  - ☐ Develop/finalize your HRIS implementation project plan
  - ☐ Record questions and send them to your HRIS provider point-of-contact
- ☐ Outline your expected HRIS implementation timeline and go-live date
- ☐ Hold a Discovery call with your provider's implementation team to discuss the set-up plan and service specifications
- ☐ Notify leadership and managers of project launch and anticipated timeline
- ☐ Set weekly check-ins with the implementation team for the duration of the project
  - ☐ Specify implementation team member contributions and expected deliverables for each meeting
- ☐ Find and record all of your employee data storage locations
  - ☐ Excel
  - ☐ Paper Forms
  - ☐ HR Software Systems
  - ☐ Other:

STAGE 2: DATA MIGRATION

3–6 weeks

You'll check all your employee data and transfer it to your new HRIS software. Depending on the support your HRIS provider offers, you'll either work with your IT department to transfer the information or send all your data to the provider for migration.

Tip: Leverage your provider's expertise throughout and **keep your team informed** of your progress.

- ☐ Determine your data migration requirements and date(s) with your IT department and HRIS provider
  - ☐ Notify stakeholders and leadership of the agreed upon data migration date(s)
- ☐ Review your data for accuracy and fill in information gaps
  - ☐ Send communications to all employees asking them to verify/update their personal information for accuracy
- ☐ Transfer data into your new HRIS OR Send all formats of employee data to your HRIS provider
  - ☐ If applicable, verify your provider has full access/editing permissions for all data formats

STAGE 3: TESTING

2–3 weeks

It's important that you identify and resolve any system errors or malfunctions before rolling out the HRIS to your entire team. Your implementation team should be diligent and thorough to reduce the likelihood that you will encounter larger issues or risk compromising your data after go-live.

Tip: If your implementation team does not include a **representative from every department** in your agency, recruit other team members (including general employees) during this stage to test every function of the software your agency needs to perform your work.

- ☐ Assign your implementation team specific tests to run according to their daily work functions
- ☐ Run tests on your new HRIS to ensure proper functionality:
  - ☐ Automations and workflows
  - ☐ Real-time calculations
  - ☐ Integration with your other systems
  - ☐ Employee self-service functions
  - ☐ Error corrections and notices
  - ☐ Reporting capabilities and accuracy
  - ☐ System lags or crashes
  - ☐ Other:
- ☐ Resolve errors or malfunctions with support from IT or your provider as needed
- ☐ Retest your HRIS as needed to ensure all errors are resolved
- ☐ Communicate your official go-live date and training requirements to your entire organization

STAGE 4: GO LIVE

2–4 weeks

You'll officially launch the new HRIS agency-wide and provide critical, comprehensive training to all employees on how to properly use the system. Providers may offer varying levels of support with the training process.

Tip: Prepare a training plan for any **hybrid and remote employees** in addition to your in-person employees so your entire organization receives effective training on your HRIS.

- ☐ Schedule training dates with leadership and team managers to teach them how to use the new HRIS
  - ☐ Collect training feedback to identify gaps, inefficiencies, or problems
  - ☐ Adjust training process for employees based on feedback, if needed
- ☐ Schedule training sessions at the department level for managers to train their employees on the system
  - ☐ *Provide a feedback collection system for employees after they complete the necessary training*
- ☐ Provide employees with an HR point-of-contact who they can reach out to for assistance after training completion
- ☐ Schedule a meeting with your implementation team to evaluate the success of your HRIS implementation project plan and review employee feedback