



Payroll Software Migration Checklist

This checklist will guide you through the steps of switching payroll providers, ensuring employee data, tax history, and pay schedules are transferred correctly.

Step 1 – Gather Employee Information

- Collect personal details (name, SSN, address, contact info).
- Verify tax forms (W-4, I-9, state equivalents).
- Confirm pay rates, job titles, and departments.

Step 2 – Export Historical Payroll Data

- Export YTD payroll reports from your old provider.
- Collect prior-year tax filings (941, 940, W-2, 1099).
- Gather PTO balances and sick leave accruals.

Step 3 – Map Deductions & Benefits

- Health insurance premiums and employer contributions.
- Retirement plan deductions and matches.
- Garnishments, union dues, or other withholdings.

Step 4 – Set Up Pay Schedules in New System

- Choose pay frequency (weekly, bi-weekly, semi-monthly, monthly).
- Configure holiday calendars and cutoff dates.
- Align accrual policies for PTO and sick leave.

Step 5 – Run a Parallel Payroll Test

- Process payroll in the new system **while running the old one in parallel**.
- Compare totals for gross pay, deductions, and net pay.
- Fix discrepancies before the first live run.

Step 6 – Notify Employees & Provide Access

- Communicate the switch to employees before the first live payroll.
- Share instructions for accessing new pay stubs and portals.
- Provide training if needed for self-service features.

Tip: The smoothest time to switch payroll providers is at the start of a new quarter or year, but with the right data prep you can migrate at any time.