



Payroll Migration Checklist

Switching payroll providers has a lot of moving pieces. Use this checklist to keep your team organized, gather the right information, confirm responsibilities and catch issues before your first live payroll.

1

Before You Switch

Timeline, reports and responsibilities

- ☐ Choose your target go-live date
- ☐ Confirm your implementation timeline
- ☐ Notify your current payroll provider
- ☐ Identify internal contacts and approvers
- ☐ Gather required payroll reports
- ☐ Confirm what historical data is needed
- ☐ Schedule a kickoff with your new payroll partner

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Gather Information

Employee, payroll and historical data

- ☐ Verify employee names, IDs and employment status
- ☐ Confirm compensation and pay rates
- ☐ Review banking and direct deposit information
- ☐ Gather federal, state and local tax information
- ☐ Review deductions, garnishments and benefits
- ☐ Confirm PTO policies and current balances
- ☐ Gather year-to-date wages, taxes and deductions
- ☐ Include historical records for terminated employees

3

Implementation

Taxes, schedules, deductions and PTO

- ☐ Verify payroll tax accounts and IDs
- ☐ Confirm pay schedules and payroll calendars
- ☐ Validate year-to-date payroll balances
- ☐ Review earnings and deduction codes
- ☐ Confirm PTO, benefits and garnishments
- ☐ Verify payroll funding information
- ☐ Confirm reporting and general ledger needs
- ☐ Review company-specific payroll requirements

4

Before First Payroll

Test payroll and reconciliation

- ☐ Run a test payroll and reconciliation
- ☐ Compare gross pay
- ☐ Compare taxes and withholdings
- ☐ Compare deductions and benefits
- ☐ Compare net pay
- ☐ Verify year-to-date balances
- ☐ Confirm PTO and direct deposit information
- ☐ Resolve unexplained differences before go-live

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After Go-Live

Payments, reports and follow-up

- ☐ Review your first payroll report
- ☐ Confirm employee payments
- ☐ Verify direct deposits and checks
- ☐ Review taxes and withholdings
- ☐ Confirm deductions processed correctly
- ☐ Review PTO balances
- ☐ Save payroll reports and supporting documentation
- ☐ Address discrepancies and confirm next steps

Ready to Make the Switch?

Talk to the PayFWDs team about your payroll setup, timeline and next steps.

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