Greenshades

Plan Your Payroll Migration

Adhere to a structured migration for a smooth transition to your new payroll solution.

Phase 1: Prepare Your Organization

Follow these steps to match the right technology to your organization's needs.

Assess Current Payroll System

- [ ] Evaluate your current system's limitations and the pain points experienced by payroll staff.
- [ ] Identify specific goals for the new payroll system, such as improved efficiency, better reporting, or enhanced compliance features.

Define Requirements

- [ ] Determine the essential features and capabilities needed in your new payroll system.
- [ ] Consider your integration requirements with other systems, such as applicant tracking, ERP, time tracking software, and other integrated tools.

Engage Key Stakeholders

- [ ] Involve key stakeholders early in the process, including payroll staff, HR, IT, and finance departments.
- [ ] Conduct stakeholder meetings to define roles and responsibilities, establish goals, and set timelines for migration.
- [ ] Emphasize the importance of ongoing communication throughout the process.

Select the Right Payroll System

- [ ] Research and compare different payroll systems to find the best fit for your organization's needs.
- [ ] Consider factors such as cost, scalability, ease of use, customer support, and compliance features.

Develop Migration Plan

- [ ] Create a comprehensive plan collaboratively, aligning with operational goals and timelines.
- [ ] Include clear timelines and milestones to track progress effectively.

Phase 2: Migrate Payroll Operations

With your organization fully prepared, it's time to begin the migration process.

Gather Essential Company Data

- [ ] Include company information, multi-entity details, locations, number of employees (including remote), and other key details required by your new system.

Perform Data Cleanup

- [ ] Review and clean existing payroll data to ensure accuracy.
- [ ] Remove duplicate records and update outdated information.

Configure New Payroll System

- [ ] Import initial data and pay history.
- [ ] Set up payroll codes, review benefit and deduction codes, configure employee HR information, and determine timesheet settings.
- [ ] Document the configuration process for future reference.

Conduct Parallel Testing

- [ ] Perform parallel pay runs to validate pay statements.
- [ ] Review ACH and Positive Pay setups.
- [ ] Ensure the accuracy of the new setup.

Execute Compliance Checks

- [ ] Ensure all components meet compliance standards and are fully integrated.

Final Review and Approval

- [ ] Review configuration settings with stakeholders.
- [ ] Obtain approval to proceed to go-live.

Maintain open communication with stakeholders and keep detailed records of your configuration and testing processes to swiftly address any issues, streamline troubleshooting, and prepare for future updates.

Phase 3: Go-Live with Payroll

Deploy and go live with your new payroll system.

Go-Live Preparation

- Finalize all system configurations and integrations.

First Payroll Execution

- Run the first payroll cycle with support from an implementation specialist if needed.

Immediate Support and Feedback

- Receive comprehensive support to address immediate questions or issues during the go-live.

Post-Implementation Review

- Collect feedback, assess the success of the migration, and make necessary adjustments.

Plan for Long-Term Support and Evolution

- Establish a roadmap for ongoing updates and support to ensure the system evolves with your business needs.

A Seamless Transition is Possible

Proper planning and execution transform the migration process from daunting to manageable. With an efficient and effective payroll transition, you can focus on what matters most—running your business.

Begin a conversation with a Greenshades payroll specialist to learn more about our simple payroll migration solutions.