



Employee Managed Services

PAYROLL OUTSOURCING

Readiness Checklist

What to confirm before payroll moves to a managed service.

Transitions go well when the groundwork is done. Work through the four areas below before a handover date is set. Where an item is not in place, it becomes a transition task rather than a surprise in the first live payroll.

The readiness checklist

Data and System Readiness

- ✓ Employee and pay data validated.
- ✓ Payroll configuration documented.
- ✓ System access and roles defined.
- ✓ Interface and file formats confirmed.

Process and Documentation

- ✓ Payroll calendar and cut-offs agreed.
- ✓ Process steps documented end to end.
- ✓ Off-cycle and exception handling defined.
- ✓ Third-party and agency contacts listed.

Compliance and Controls

- ✓ Tax registrations and jurisdictions confirmed.
- ✓ Garnishment orders current and reconciled.
- ✓ Prior-period and year-end items closed.
- ✓ Approval and audit controls agreed.

People and Governance

- ✓ Retained in-house roles confirmed.
- ✓ Service scope and SLAs agreed.
- ✓ Escalation and contact model defined.
- ✓ Employee communication plan ready.

You are ready when



The Data Agrees

Balances, deductions, and orders reconcile.



The Process is Clear

Every step and exception has an owner.



The Scope is Agreed

Everyone knows what EMS runs.

Not sure where you stand? EMS can run the readiness review with you and scope what is left to do.

Payroll, Your Way.