COVALENCE

an HR Path company

Get Your *Shift* Together CHECKLIST

A comprehensive guide to managing change in UKG Pro

PAYROLL

Taxes

- ☐ Determine if a new company is required or if employees are entering an existing company
- ☐ Identify any new tax IDs, FEINs, BN numbers, or tax accounts that need to be established
- ☐ Confirm whether any tax filing frequencies are changing
- ☐ Assess year-end reporting impact
- ☐ Identify any new tax jurisdictions that need to be established
- ☐ Confirm whether new work locations are required

Pay Groups

- ☐ Determine if employees are moving to a new payroll calendar or the existing schedule
- ☐ Account for any overlapping or missed days between calendars if migrating to the existing schedule
- ☐ Confirm whether new pay groups are required

Banking

- ☐ Determine if a new bank account is required
- ☐ Confirm whether the new account is at the same bank or a new one
- ☐ Update NACHA/positive pay files as needed

Payments

- ☐ Confirm whether employees are 100% direct deposit or if some receive paper checks and address any configuration or process changes needed

Earnings

- ☐ Identify any new earnings codes required
- ☐ Retire or rename any impacted existing earnings codes
- ☐ Review overtime, premium pay, shift differentials, bonuses, commissions, and other special earnings for impact

- [ ] Update earning groups to include any new earning codes
- [ ] Validate all earnings and earning group assignments through testing

Deductions & Benefits

- [ ] Identify any benefit plans that are changing
- [ ] Identify any new deduction codes required
- [ ] Retire or rename any impacted deduction codes
- [ ] Update deduction groups to include any new deduction codes
- [ ] Review deduction groups used for reporting, interfaces, payroll calculations, or eligibility rules
- [ ] Notify benefit vendors and assess carrier feed impact
- [ ] Validate employee and employer contribution calculations for accuracy
- [ ] Validate all deductions, benefit plans, and deduction group assignments through testing

HUMAN RESOURCES

Employee Data

- [ ] Determine if new employee types are required
- [ ] Update supervisor assignments as needed
- [ ] Identify any forms, documents, or acknowledgements impacted by the change

Workflows

- [ ] Update approval workflows impacted by organizational changes
- [ ] Update onboarding, offboarding, or employee change workflows as needed

Organization

- [ ] Assess whether Org levels need restructuring
- [ ] Assess whether Job Codes need restructuring or addition of new codes
- [ ] Update cost centers, departments, or locations as needed
- [ ] Review any custom fields or business rules for impact
- [ ] Update supervisor assignments as needed
- [ ] Identify any forms, documents, or acknowledgements impacted by the change

TIMEKEEPING

Rules

- [ ] Review work rules for changes
- [ ] Confirm overtime calculations are unaffected or update as needed
- [ ] Review meal and break rules for changes

- [ ] Review holiday rules for changes
- [ ] Review shift differential rules for changes
- [ ] Review labor allocation rules for changes

Reporting / Security

- [ ] Update timekeeping reports as needed
- [ ] Update manager security roles as needed
- [ ] Update supervisor assignments as needed
- [ ] Update labor level qualifiers as needed

Accruals / Time-Off

- [ ] Confirm whether existing balances will be transferred and execute accordingly
- [ ] Review accrual policies for changes
- [ ] Review carryover rules for impact
- [ ] Update approval workflows for time-off requests as needed

Scheduling

- [ ] Review schedule groups for changes
- [ ] Review labor levels used in scheduling for changes
- [ ] Confirm manager scheduling responsibilities
- [ ] Review schedule templates for impact

Clocks

- [ ] Confirm whether physical clocks are impacted and update as needed
- [ ] Update clock assignments as needed
- [ ] Update badge numbers as needed
- [ ] Review mobile punching, geofencing, and biometric settings for impact
- [ ] Determine if employees require retraining or punch methods

UPSTREAM / DOWNTREAM

Integrations

- [ ] Inventory all integrations and document whether they are inbound or outbound
- [ ] Identify integrations sending or receiving fields changed as part of this project
- [ ] Identify integrations with prompts or filters based on changed fields
- [ ] Notify all third-party vendors of the change
- [ ] Complete integration testing with each vendor
- [ ] Update file layouts or mapping specifications as needed
- [ ] Update key fields such as company, location, and organization code as needed

Reporting - Inventory

- ☐ Identify all reports used regularly by Payroll, HR, Managers, Finance, and Leadership
- ☐ Flag business-critical reports required immediately after go-live
- ☐ Document which reports are accessed through UKG Pro standard reporting vs Business Intelligence (Cognos Analytics)

Reporting – Business Intelligence / Cognos Analytics

- ☐ Review Cognos packages, dashboards, and scheduled reports for impacted fields
- ☐ Update any Cognos reports with hardcoded values, prompts, or filters that require changes
- ☐ Review data modules, report views, and custom calculations for needed updates
- ☐ Update any impacted scheduled reports
- ☐ Update report distribution lists and recipients as needed

Reporting – Validation and Security

- ☐ Test and validate key reports following the change
- ☐ Review key report consumers and security roles for impact
- ☐ Confirm managers and leaders will retain access to required reporting data after deployment

Security

- ☐ Update user roles and qualifiers to reflect organizational changes
- ☐ Complete a security audit prior to deployment

CHANGE MANGEMENT

Testing

- ☐ Set up and utilize a test environment for all changes
- ☐ Determine whether to test a subset of employees or the full population
- ☐ Determine whether to test each module individually or end-to-end
- ☐ Select pay period(s) to use for testing
- ☐ Document anything that cannot be fully tested prior to deployment

Communication

- ☐ Develop and execute a communication plan for employees, managers, and other admins
- ☐ Identify all stakeholder groups requiring buy-in (Payroll, HR, IT, Finance, Ops, etc.) and engage accordingly
- ☐ Establish a feedback and issue-reporting channel for users

Deployment

- ☐ Determine the optimal deployment timing (fiscal year, calendar year, quarter, or pay period start)
- ☐ Define the support structure and escalation path for deployment day