

Checklist for Purchasing a HRIS Program

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Human Resource Information Systems (HRIS or HRMS) help manage employee data from the time of hire to post-termination COBRA administration. They have rapidly evolved over recent years to address the differing needs of managing the workforce. Whether you have 10 or 10,000 employees, chances are there is a program that will work for your company.

Use this checklist to help take a step by step approach to identifying and purchasing a HRIS that works for you. If any questions, please let me know!

1. System Features

- Dashboards/scorecards
- Reporting abilities/analytics
- White labelling/branding
- Customization of look, reports, dashboards, etc.
- API's with benefit and work comp carriers
- Establish calendars to delete, store or back-up data
- Mobile access across platforms
- Cloud based vs desktop
- Cyber security and other IT protocols
- Ability to transfer employee across depts, locations, etc.

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2. Administration

- Org charts
- Workforce planning/analysis/predictive analytics
- Analytics/reporting
- Employee/company asset management
- Communication/reminders (i.e. birthdays, document destruction)
- Personnel file storage
- Access to company documents (integrate with Dropbox?)
- Time and attendance/scheduling
- Leave management
- Claims management

3. Hiring

- Job description builder
- Internal posting of jobs
- Recruiting tie-ins to Indeed, LinkedIn, etc.
- Applicant tracking system (internal or through API)
- Tie-ins to testing and assessment software
- Tie-ins to background checks (See www.GHRR.com)
 - Criminal
 - Credit
 - DMV/MVR
 - Drug test
 - Fit for duty exams
 - Immigration compliance
- Document management
 - New hire docs like W-2
 - Employee handbook
- Contracts/agreements
- Auto-fill and retain
 - Electronic signatures
 - Access restrictions/permissions
 - Retention and destruction calendaring
- Payroll management and reporting
 - Time and attendance tie-in
 - Overtime calculations and reporting
 - Garnishment management
- Employee portal
 - Time and attendance
 - Employee self-service for benefits
 - Payroll/paystub details
 - Performance management
 - Training management
 - Mobile access
- Onboarding process
- Management of 1099 contractors

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4. Performance Management

- Assign goals/KPI's/OKR's
- Develop metrics and timelines
- Employee self-assessment
- Manager 360
- Project management (like Basecamp or Slack)
- Notations, discipline, PIP
- Termination procedures
- Exit interview
- Employee surveys
- Employee suggestions

5. Training

- LMS system – stand-alone or API tie-in into ThinkHR, Lynda, etc.
- Available training titles: compliance, leadership, technical, etc.
- Upload company developed training and SCORM compliant third-party titles
- Employee career development training paths

6. Compensation Management

- Access to salary surveys
- Setting compensation ranges
- Bonuses: discretionary and non-discretionary
- Rewards
- Create compensation plans

7. Benefits/Medical/Wellness/401K

- Benefits
 - Choose, change, ancillary benefits
 - COBRA, mini-COBRA
 - TPA access/tie-in
 - Wrap documents, SPD's availability for employees
 - HSA, HRA, FSA, and 132(a) plans
- Wellness
 - Enrollment
 - Tracking
 - FitBit tie-in, etc.
 - Education
- Miscellaneous
 - Employee discount programs
 - EAP access
 - Tie into 401K portal
 - Hotline reporting access

8. Compliance

- Recordkeeping
- OSHA reporting
- EEO-1 reporting
- VET-100 reporting
- Document retention
- FMLA tracking
- Disability management

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9. Multi-State Challenges

- Payroll
- Benefits
- Leave management
- Work comp.
- Professional licensing

10. Factors Involved in the Selection Process

- Company size, locations, industry
- Available talent for implementation, training and ongoing management
- Budgeting considerations
- Hardware/internet requirements

11. Identify the Team

- IT, HR and who else? Recruiters, payroll, compensation, training, etc.?

12. Create a Request for Information (RFI)

- Identify company wish list to see if vendor can supply the necessary features and functionality

13. Identify Possible Vendors

- "Stand-alone" providers- BambooHR, Workday, People-Trak, etc.
- Payroll companies- ADP, Paylocity, Paychex, etc.
- Insurance brokers- Marsh, AON, local brokers
- Industry niched- education, construction, healthcare
- Zenefits model- "give-away" approach to get insurance
- Go on demos with evaluation team and rate
- User reviews- Capterra, Software Advice, HR groups
- Obtain References from Existing and Former Clients
- Identify 3 finalists
- See <http://www.capterra.com/human-resource-software>

14. Produce a Request for Proposal (RFP)

- Finalize features/functions required
- Implementation, training and support requirements
- 2-3 year contract
- Precise costing for core product and any add-ons

15. Negotiate the Contract

- All contracts are negotiable
- Free upgrades?
- Uptime standards
- Additional service fees
- Additional support/consultation
- Getting data out of the system