Implementation Best Practices

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ADP

Before Getting a new system

- Do you have your current system documented?
- Are there any financial or technical ramifications of ending your current contract?
- Have you completed a scope of work? What do you want your new system to do that your present system does not?

During the Sales Cycle

- Be sure you are included in the process – make sure you are getting what you need.
- Are you planning on importing historical data (job history/check history) into your new system? How will that be done and by who?
- Are you doing a mid-year conversion? Think about balances/ytd information. Do you have a way to get this from your current vendor?

Project Team

- **Executive Sponsors**
  - Make key decisions

  Project Managers
  - Manage Day to Day – Keep track of plan

  <u>SME's</u>

  Payroll

  HR

  Time

  GL

  Benefits

Project Plan

- Captures Day to Day Tasks
  - Include out of office days for project team members
  - Highlight key deliverables and milestones
  - Keep track of percentage complete
  - Tool: MS Project

Providing Data

- Discuss data requirements for conversion as soon as possible
  - Review & agree on formats/headings
  - Discuss frequencies for refreshed data
  - Account for leading zeros in number fields
    - Employee ID's
    - Table Data (Job Codes, Departments, etc)
    - Zip Codes

System Training

- Vendor should provide training requirements and timing
- Be sure to complete training timely.
- Involve other system users who may not be part of the core project
- Start documenting processes – create End User Training Guide(s)
- Utilize online system tools

Interfaces

- Does your system "talk" to other systems?
  - Will employee numbers change
- Involve your vendors in the conversion process – get specs completed sooner than later.
- Carve out time for testing. Be present on all calls between vendors!
  - Be sure to test all scenarios (new items, changes & deletions – as well as goals)

Employee Identification

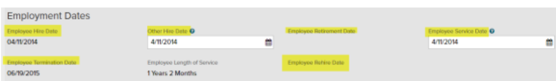
- What number(s) do you use to identify your employees?
  - Key fields using SSN are common, but beware of company & vendor requirements regarding security.
  - Best practice is to use an EMPLOYEE # that is unique for each employee.

More than one number?

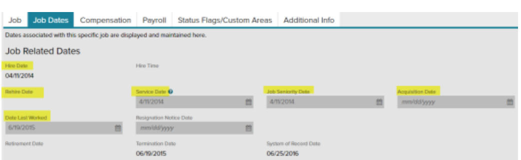
- Some systems have more than one number to identify employees. Make sure you have discussed your current system setup to address any potential issues
  - Multiple FEIN's for one employee
  - Transfers throughout the year (be sure to test these in advance)

Dates, Dates and More Dates

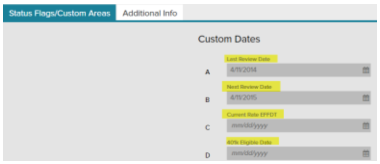
- Be sure to communicate your uses of dates in your current system and how the new vendor handles date fields:

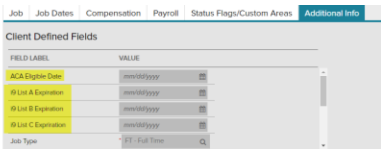


Dates (Continued)



Dates (Concluded)





Testing

- Assign users required training classes to make sure you utilize the system to its full potential.
- Carefully review data you are sending to your vendor: Company tables (JobCodes, Departments, Earnings, Deductions, etc) as well as employee data (fix your data before sending on – ex: invalid SSN's, DOB's)
- Review data being loaded into your new system (demographic, HR, Payroll, Time, Benefits, Comp, Talent)

Testing Continued

- Review/create test scripts including all touch points (responsible parties).
- Test all processes – Events: newhires, terminations, transfers, leaves of absence, pay changes. Per Pay Transactions: hours, earnings, bonuses, deductions in arrears.
- Use a list of test scripts (Tool: Excel with Pass/Fail & Retest)

Reporting Tools

- Look for and run delivered reports within the new product.
- Scope out, create (or have created) special reports needed for internal and external sources

Analytics

- Most HCM systems include an analytics section to show specific metrics and trends

Employee Access

- Allow employees to enter most common updates:
  - Address Changes
  - Tax Withholding
  - Emergency Contacts
  - Direct Deposit Elections
  - Annual Enrollment
  - 401k Changes (at appropriate times)

Manager Access

- Allow managers enter updates needed for their employees
  - New Hires
  - Terminations
  - Status Changes (Departments, Jobs, etc)
  - Pay Changes

  Use system workflow to handle notifications and approvals

Super Users Access

- Work with your vendor to configure appropriate levels of access/segregation of duties
- Test out setup before go-live!
- Document security setup and process for making updates