



Paycor Go-Live Checklists





Your Complete Guide to a *Successful Implementation*

Welcome! This comprehensive checklist organizes all critical tasks needed for a successful Paycor go-live. Each section is organized by product area—[Payroll](#), [HR](#), [Time](#), and [Scheduling](#)—so you can coordinate your teams, complete required actions, and experience a seamless transition.

Payroll Checklists

Employee Registration and Live Punching Quick Guide

Purpose

The goal of these tasks is to ensure your employees and managers are registered correctly and comfortable using the new time clock system before the first day of the pay period. Early exposure helps reduce confusion, builds confidence, and supports a smooth transition on go-live day.

Timing

We recommend beginning this task 1–2 weeks prior to the first punching date. This allows plenty of time for setup, training, and troubleshooting, ensuring everyone is ready to punch in accurately and confidently on day one.

Important: This task cannot begin until after the Database Handoff milestone has been completed, as that ensures your system configuration is finalized and ready for employee registration.

Tasks

- Send employee registration by navigating to Menu > Company > User Access > Access and Registration > Unregistered tab [View Instructions](#).
- Grant Clock Access – Your Time Implementation Consultant will complete this task after you have provided requested employee clock access details. Employees must be granted clock access to begin punching.
- Employees must register in a browser prior to using the mobile app. The browser they choose can be on their phone, such as Safari on an iPhone, but registration is not available in the app.

Payroll Checklists

Go-Live Preparation Checklist

Purpose

This checklist helps ensure all components required for a successful first payroll are accurately set up and ready to go. This includes:

- Establishing payroll funding
- Ensuring that delivery setup is correct
- Ensuring all employee information in the database is complete and accurate

Timing

This checklist should be completed by your Payroll Administrator 7–14 days prior to your go-live date.

Tasks

- Verify bank account information for funding payroll and turn off any debit blockers.
- Confirm that delivery addresses are accurate.
- Notify your Paycard vendor of transition to Paycor, if applicable.
- Notify previous payroll vendor of your transition to Paycor (most clients wait until after their first Paycor processing).
- Hire, terminate, and process employee leaves that happened after the database handoff call.
- Send employees the Paycor registration instructions: [Help for Employees](#)
- After you've processed initial payroll in your current system, provide the required YTD reports as requested by your Implementation Team.

Payroll Checklists

Preparing for Balance Entry Milestone

Purpose

The Balance Entry milestone ensures that all Year-to-Date (YTD) payroll information is accurately entered into Paycor before submitting your first payroll. This step is critical for:

- Ensuring W-2 forms are accurate at year-end
- Confirming employees are taxed correctly from their first Paycor paycheck

Timing

After the final payroll is processed in your current system, your Payroll Administrator should provide the required YTD reports. The timing will vary based on your Paycor go-live date, but it's important that this step is completed before your first payroll is processed in Paycor.

Important: Failure to provide the required documents in time may result in a delay of beginning your first Paycor payroll processing task.

Tasks

- Make sure to follow the steps in the Best Practices for Dual Maintenance Quick Guide
- Have all tracked New Hires added to the database prior to your Balance Entry extraction date, which will be determined by your Implementation Team. Important: If new hires are not in the system, the balance entry team cannot import the YTD totals.
- After you have processed the final payroll in your current payroll system, provide the requested YTD reports to your Implementation Team.

Other Important Information

When the Balance Entry milestone begins, your Paycor database will be locked (read only). Work with your Implementation Team to understand what information is locked in your database and understand when you can expect it to be unlocked so you can begin the first payroll processing task.

Payroll Checklists

First Payroll Processing Checklist

Purpose

This checklist is designed to guide you through the steps required to ensure a successful and accurate first payroll with Paycor. **It covers both setup and processing tasks to help you:**

- Confirm that direct deposit, employee data, and payroll settings are correctly configured.
- Ensure time data is flowing properly, and managers are aligned on timecard deadlines.
- Accurately process payroll by validating hours, reviewing pay data, and resolving any outstanding tasks.

By following this checklist, you'll be fully prepared to submit your first payroll with confidence, knowing that all critical components—from funding and delivery to employee pay details—are in place and functioning as expected. Completing these steps helps prevent delays, errors, and rework during your first payroll run.

Timing

This checklist should be completed by your Payroll Administrator within 7 days prior to your first payroll processing date.

Important: You must have completed the necessary setup steps and milestones leading up to payroll, including database handoff and balance entry, before beginning this checklist.

Setup Payroll Checklist

- Confirm Direct Deposit Setup** – Use Report Builder to run the Bank/Direct Deposit report and verify employee banking information is correctly entered.
- Review Time Dashboard** to ensure employees are clocking in as expected and time data is flowing correctly.
- Remind Managers of Timecard Deadlines** by sending reminders to managers to approve timecards and time off requests before payroll begins.
- Validate Active Employees** by running the Employee Roster (Admin) to confirm all new hires and terminations have been processed.
- Review Advanced Payroll Settings** and navigate through each tab: General, Paystubs, Range Warnings, Workweek, Tipped Employee to confirm settings prior to beginning payroll.

Payroll Checklists

First Payroll Processing Checklist (Continued)

Processing Payroll Checklist

- Begin Payrun** – Doublecheck the pay period and check date for accuracy, then click Begin.
- Import Timecards** (if applicable) and review totals to ensure timecards are successfully imported into the grid.
- Customize Paygrid** by adding/removing columns from the paygrid and dragging/dropping columns to rearrange.
- Review Payrun Tasks** menu for any open tasks and resolve them.
- Enter Payroll Adjustments**
 - Make one-time employee payroll adjustments by clicking the employee's name and the appropriate tab (earning/deduction/tax) as needed. This change will only affect this payrun.
 - For permanent changes, update the employee profile directly.
- Validate Hours and Totals** at the bottom of the paygrid and confirm totals are accurate.
- Review Payrun** – Carefully review all pay data, then click Review Payrun.
- Review Post Payroll Reports** located at the bottom of the Review Payrun screen using available reports to validate payroll accuracy.
- Submit Payroll** – Once submitted, employee paystubs and payroll reports will generate within a few hours.

HR Checklists

HR Go-Live Checklist

Purpose

This checklist ensures your employee management and onboarding settings are properly configured before you go live. It helps verify workflows, permissions, employee and job settings, manager assignments, and onboarding documents so your team is set up for a smooth launch and employees have a positive first experience with Paycor.

Timing

Your HR Administrator should complete this checklist after HR configuration is complete and prior to the pay period start date.

Tasks

- Review all automated workflows** – Verify approvals and routing logic are configured correctly.
- Verify user permissions** – Confirm role-based access controls align with your organizational structure.
- Review Employee Settings menu** – Confirm settings for Employee Conduct, Recognition, Self Service, Employee Personal Information, Employee Immunizations, Termination Wizard, Duplicate Employee Records, and Employee Pay Rates are configured appropriately.
- Confirm Job Management menu is complete** – Navigate to People > People Settings > Job Management to review job title details including EEO, work locations, etc.
- Confirm Management Assignments** – Navigate to People > All People and review manager assignments. *Quick Tip: Use the filters on the left menu to see Manager assignments. You can use the Bulk Actions feature to reassign managers.*
- Review Forms & Documents Library** – Confirm that all forms and documents are setup and attached to the correct onboarding groups.
- Configure Engage** – Consider preparing a Welcome Message with tasks on the Engage feeds for employees' first-time Paycor logins. We recommend linking helpful articles or instructions to review employee information and make updates for self-service if this feature is enabled.



Time Checklists



Punching Go-Live Checklist



Purpose

This checklist helps ensure that your administrators, managers, and employees are properly trained, have the correct access, and understand go-live expectations for timeclock usage. By completing these steps, you'll support a smooth transition to the new platform and minimize disruptions on the first day of live punching.

Timing

Your Time Administrator should complete this checklist after Time Configuration is complete and prior to the pay period start date.

Tasks

- Complete employee registrations.
- Assign manager user access.
- Confirm employees are assigned to appropriate punch profiles and policy groups.
- Communicate go-live punching date to managers and employees.
- Confirm punching is happening on the Time Dashboard.
- Communicate Timecard Approval deadlines to managers. *Note: We recommend choosing a deadline at least 24 hours prior to beginning the first payroll processing task.*
- Address timecard exceptions daily/weekly to get ahead of any issues prior to importing timecards for first payroll processing.

Schedule Pro/Labor Forecasting Checklist

Scheduling Pro and/or Labor Forecasting Go-Live Checklist

Purpose

This checklist helps ensure that your scheduling and labor forecasting tools are fully and accurately set up before employees begin using them. Completing these steps helps prevent disruptions, ensures employees are scheduled correctly, and supports a smooth transition to Paycor to improve both the employee experience and operational efficiency.

Timing

Your Time Administrator should complete this checklist after Time Configuration is complete and prior to the pay period start date.

Scheduling Tasks

- Ensure all employees have a job title.
- Create scheduling groups.
- Create recurring/schedule templates if needed.
- Publish schedules.

Labor Forecasting Tasks

- Learn about Labor Forecasting [View Guide](#)
- Setup forecasting policy [View Setup Instructions](#)