INDEAVOR

Employee Data Migration Checklist

Introduction

Employee data management is how an organization collects, validates, maintains, and retires workforce information across the full employment lifecycle. A good employee data management system means every downstream application, including scheduling, payroll, compliance, and analytics, pulls from one verified source of truth instead of competing, out-of-sync records.

By following this checklist before a scheduling implementation, organizations can catch the data issues that consistently derail go-lives and build a foundation that holds up long after launch.

Signs Your Employee Data Isn't Ready for Migration

Bad employee master data does not surface gradually. It shows up the moment an automated schedule runs and a supervisor has to fix it manually. Watch for these signals before you migrate.

- Terminated employees still appearing as schedulable.
- Duplicate records tied to transfers or site changes.
- Job codes that don't match the ERP.
- Certification records that exist in the LMS but never synced to the HRIS.
- Employees showing the wrong pay classification.

INDEAVOR

Your Data Readiness Checklist

Extract and Inventory

Before you can clean anything, you need to know what exists and where it lives. This step also surfaces integration dependencies you'll need later.

- ☐ Pull a full export from every source system, including HRIS, ERP, LMS, and time and attendance
- ☐ Build a master inventory of what fields exist in each system and their formats
- ☐ Identify which system holds the authoritative version of each data type
- ☐ Map integration dependencies, such as a planned ERP sync, before migration begins

Employment Status and Record Cleanup

Old, stale, unwanted records make ghost employees show up in the schedule and create compliance risk.

- ☐ Archive terminated employees per your retention policy
- ☐ Update leave types and rehire flags
- ☐ Identify duplicate or orphaned records with no match in the source system
- ☐ Remove test accounts left over from prior implementations

Master Data Accuracy

Names, IDs, job titles, and cost centers form the foundation every other system builds on. Errors here cascade into scheduling, payroll, and compliance reporting alike.

- ☐ Reconcile employee IDs, job titles, and departments against the HRIS
- ☐ Confirm cost centers and pay classifications are current
- ☐ Standardize department and job code naming across systems
- ☐ Flag any fields with inconsistent formatting or casing

Qualification and Skills Data

Scheduling systems enforce task eligibility automatically. If certification and training records are incomplete, that enforcement quietly fails.

- ☐ Cross-check certifications and license expiration dates against the LMS
- ☐ Confirm training records synced correctly to the HRIS
- ☐ Validate task eligibility rules against current qualification data
- ☐ Identify any skills records that exist in one system but not another

INDEAVOR

Checklist Continued

Scheduling-Specific Data

This category is the least maintained because it often lives outside the HRIS entirely, in spreadsheets or in a supervisor's head.

- ☐ Collect shift patterns and availability constraints from source owners
- ☐ Standardize union affiliation and CBA codes
- ☐ Confirm seniority dates and overtime classification are current
- ☐ Confirm ownership for scheduling-specific fields not currently tracked in the HRIS

Compliance and Retention

Employee data used for scheduling carries the same regulatory obligations as HR records, including under GDPR for organizations with EU-based employees.

- ☐ Confirm a lawful basis for processing scheduling data
- ☐ Limit migrated fields to what scheduling actually requires
- ☐ Apply the same retention and deletion schedule as HRIS records
- ☐ Confirm the scheduling platform can support subject access requests

Validation and Testing

Reconciling the cleaned extract against source systems is what separates a go-live that works from one that needs three months of cleanup.

- ☐ Validate record counts against each source system
- ☐ Spot-check individual records against HR files
- ☐ Confirm skills and certification data matches the LMS export
- ☐ Run parallel scheduling scenarios in staging before go-live

Governance and Ownership

Clean data at go-live only holds up if someone owns keeping it that way. Document these answers before launch, not after.

- ☐ Assign ownership for updating records after transfers and terminations
- ☐ Define how fast a termination propagates to the scheduling system
- ☐ Set a review cadence for certification expiration dates
- ☐ Document the integration or sync process that keeps data current