HRIS Features Checklist

1. System Features
- ☐ Dashboards/scorecards
- ☐ Reporting abilities/analytics
- ☐ White labeling/branding
- ☐ Customization of look, reports, dashboards, etc.
- ☐ Application Program Interfaces (API's) (ie benefit/WC carriers, ATS, LMS, etc)
- ☐ 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.
- ☐ Email Alerts
- ☐ Keyword or ease of search capabilities
- ☐ Employee Self Service
- ☐ Manager Self Service (level of access to information)
- ☐ Administrator, Manager, Employee, Finance, IT, etc customized views (Access restrictions/permissions for data security)

2. Administration
- ☐ Organization charts
- ☐ Workforce planning/analysis/predictive analytics
- ☐ Analytics/reporting (Canned and ease of ad hoc)
- ☐ Communication/reminders (i.e. birthdays, document destruction)
- ☐ Personnel file storage (ease of upload)
- ☐ Access to documents (integrates with ?)
- ☐ Time and attendance/scheduling
- ☐ Leave management
- ☐ Claims management
- ☐ Handbook Maintenance
- ☐ Job and pay history
- ☐ Salary Change Requests
- ☐ Employee Safety History
- ☐ FLSA
- ☐ Succession Planning

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3. Hiring capabilities in HRIS *(Applicant Tracking System is often a separate system but some HRIS offer basic ATS functionality and new hire paperwork support)*

- ☐ *Requisitions*
- ☐ Job description builder
- ☐ Internal posting of jobs
- ☐ Recruiting tie-ins to Indeed, LinkedIn, etc.
- ☐ Applicant tracking system (additional module or through API to another product or other systems)
- ☐ Interview documentation storage
- ☐ Tie-ins to testing and assessment software
- ☐ Tie-ins to background checks
    - ☐ Criminal
    - ☐ Credit
    - ☐ DMV/MVR
    - ☐ Drug test
- ☐ Immigration compliance
- ☐ Document management
- ☐ New hire docs like W-2 (Full onboarding module or just new hire paperwork?)
- ☐ Contracts/Offer letters
- ☐ Auto-fill and retain (ideally through info collected on application)
- ☐ Electronic signatures
- ☐ Retention and destruction calendaring
- ☐ Payroll integration and reporting
- ☐ Mobile access
- ☐ Onboarding process
- ☐ Analytics/reporting (Canned and ease of ad hoc)

4. Performance Management

- ☐ Canned performance reviews/ease of customization of reviews
- ☐ Assign goals/KPI's
- ☐ Develop metrics and timelines
- ☐ Employee self-assessment
- ☐ Manager 360
- ☐ Project management of annual review process, ongoing feedback, etc
- ☐ Performance Reviews, Notations, discipline, PIP
- ☐ Termination procedures
- ☐ Exit interview
- ☐ Employee surveys
- ☐ Analytics/reporting (Canned and ease of ad hoc)

HRIS Features Checklist

5. Training *(Most HRIS systems have some ability to track training, certs, etc)*

- ☐ LMS system – stand-alone or API tie-in
- ☐ Available training titles: compliance, leadership, technical, etc.
- ☐ Upload company developed training
- ☐ Employee career development training paths
- ☐ Enrollment
- ☐ Employee skill inventory
- ☐ Notices/certificates/licenses
- ☐ Analytics/reporting (Canned and ease of ad hoc)

6. Compensation Management

- ☐ Setting compensation ranges
- ☐ Bonuses: discretionary and non-discretionary
- ☐ Create compensation plans
- ☐ Pay equity analysis
- ☐ Salary history
- ☐ Pay grades

7. Benefits/Medical/Wellness/401K (Rare that an HRIS can support benefits. If needed look for a strong Benefit Administration module to purchase)

- ☐ Benefits
- ☐ Statements
- ☐ Choose, change, ancillary benefits
- ☐ COBRA
- ☐ ERISA
- ☐ TPA access/tie-in
- ☐ Wrap documents, SPD's availability for employees
- ☐ HSA, HRA, FSA, Transit, etc
- ☐ Wellness
- ☐ Enrollment
- ☐ Analytics/reporting (Canned and ease of ad hoc)
- ☐ Tie-in to Wellness apps or products
- ☐ Account balance reporting
- ☐ Employee discount programs
- ☐ EAP access
- ☐ Tie into 401K portal

HRIS Features Checklist

8. Compliance

- ☐ Recordkeeping
- ☐ OSHA reporting
- ☐ EEO-1 reporting
- ☐ Support for Affirmative Action plan development and administration
- ☐ Canned reports to meet individual state requirements
- ☐ Canned audit reports to support analysis of compliance with state laws
- ☐ VET-100 reporting
- ☐ I-9
- ☐ Document retention
- ☐ FMLA/state leave tracking
- ☐ Disability management or API to STD carrier

9. Multi-State and/or International Capabilities

- ☐ Payroll
- ☐ Benefits
- ☐ Leave management
- ☐ Work comp.
- ☐ Professional licensing/training requirements