Are You Payroll Ready?

A pre-payroll coordination checklist to help catch changes before payroll is submitted

Use this checklist each pay period to confirm that workforce changes, time, and pay items are complete and approved before payroll is submitted—and to follow up on anything unexpected afterward.

How to use: Complete sections 1–4 before submitting payroll and section 5 after it is processed. Record anything that needs follow-up in the Exception / Follow-Up Log.

Pay period _____ **Pay date** _____

Prepared by _____ **Reviewed by** _____

> **ThriveWell scope note:** This checklist supports payroll readiness, accuracy review, updates, and coordination. ThriveWell HR Consulting, LLC does not currently process payroll or serve as the payroll provider.

1 Workforce Changes

- ☐ New hires are entered or communicated to the payroll provider with correct effective dates.
- ☐ Terminations are recorded with final-work dates and required information.
- ☐ Pay-rate, salary, promotion, transfer, status, or schedule changes are documented and approved.
- ☐ Leave or return-to-work changes that affect pay are identified.

2 Time & Attendance

- ☐ Timecards / hours have been submitted for the full pay period.
- ☐ Missing punches, corrections, and manager approvals are resolved.
- ☐ Overtime and other premium hours have been reviewed under applicable rules and company policy.
- ☐ Paid time off, unpaid time, holiday time, and other tracked time are entered correctly.

3 Pay Items & Deductions

- ☐ Bonuses, commissions, incentives, reimbursements, or other approved pay items are identified.
- ☐ Authorized deduction changes have been communicated and effective dates confirmed.
- ☐ Garnishment or other legally required withholding information is routed to the appropriate payroll/provider process.
- ☐ One-time adjustments have supporting documentation and approval.

4 Accuracy Review Before Submission

- ☐ Employee names / IDs and pay-period dates are correct.
- ☐ Large or unusual changes have been reviewed against supporting documentation.
- ☐ Gross pay or hours that look materially different from the prior cycle have been investigated.
- ☐ Known new-hire, termination, leave, and compensation changes appear in the preview or provider records.
- ☐ Required approvals are complete before final submission.

5 After Payroll Is Processed

- ☐ Payroll reports are reviewed for unexpected differences or exceptions.
- ☐ Known corrections are documented and routed promptly.
- ☐ Payroll records and approvals are retained according to the organization's recordkeeping process.
- ☐ Employee questions are tracked and directed to the correct internal contact or payroll provider.

6 Exception / Follow-Up Log

EMPLOYEE / ISSUE	ACTION NEEDED	OWNER	DUE DATE / STATUS

Want a second set of eyes before payroll runs?

ThriveWell HR Consulting, LLC helps small businesses with payroll readiness, accuracy reviews, employee updates, and coordination with your payroll provider.

Have a question? Visit **Ask ThriveWell** at thrivewellhrconsultingllc.com

Important: *This resource is provided for general educational and organizational purposes. It is not legal, tax, payroll-processing, benefits, or accounting advice. Requirements vary by employer, location, workforce, and situation. Confirm applicable requirements with the appropriate professional or government agency when needed.*