HR Testing Checklist

Each time a new release or service pack is readied for deployment, Tyler Technologies thoroughly tests all parts of the software; however, due to the configurability of the applications and each customer's unique deployment environment, we strongly recommend that you test the processes and features noted on this checklist each time you apply a hardware or software update. Although testing may require a large time investment, it is small compared to the potential costs of correcting preventable problems in a production environment.

This checklist is designed to help your organization verify that all of the application's features are working correctly before the update is rolled out in your production environment. We have tested all core parts of the application, but the ancillary functionality that is often customized (e.g., calculations, forms, imports and exports) or uniquely configured to your environment (e.g., cash registers, slip printers, check signers, eSuite services) should be tested locally to verify accuracy and compliance.

For testing that involves license keys and user security, it is important to test the software with your unique security configuration before applying an update to your production environment. In all cases, unless specifically referenced for an item in the release notes, Tyler tests the software with a license key that has access to all applications, modules and user profiles.

**Core Processes**

Some processes are highly dependent on your environment to function correctly or are a critical part of your daily operation. If applicable, these items should be tested and validated.

* Employee processing
  + Hire an employee
  + Update employee information
* Benefits enrollment
* Process a parallel payroll
  + Calculate accruals
  + Review the gross-to-net calculation
  + Validate the general ledger distribution amounts.
* Email payment confirmations
* Mass Rate Increase
* Step Rate Increase
* Personnel Actions
  + Submit a new personnel action
  + Approve a personnel action
  + Post a personnel action
* Look Back Measurement Reporting
* HR Audit
  + Make a change

**Forms**

Tyler tests only the standard version of any form. Regardless of whether you are using a custom version of a form, please verify that all of the applicable forms on this list produce the expected output. In all cases, testing should include generating the output and printing the form to verify that signatures, MICR coding, bar coding, OCR coding, etc., all appear as expected.

* EFT stub
* Pay check
* W-2s (applies to year-end updates only)
* 1099-Rs (applies to year-end updates only)
* 1095-Cs (applies to year-end updates only)

**Imports and Exports**

Tyler tests only the import and export functions using the standard file definition for the process. Regardless of whether you are using a custom version of an import or expert, please verify that all of the applicable imports and exports on this list produce the expected results. Exported information should be consumed by whatever external process uses that data. Imported information should be reviewed at a high level to verify completeness and accuracy.

* Third-party hours import
* ACH transmittal file export
* Employee data export
* Positive pay transmittal file export
* State requirements transmittal file exports
  + Quarterly wage
  + Retirement system
* W-2 transmittal file export (applies to year-end updates only)
* 1095-C transmittal file export (applies to year-end updates only)

**Services**

Services are installed to support interoperability between new world ERP, the eSuite applications and other third-party applications. Because they are installed separately from the core application and typically on a different server, special attention must be paid to ensure the service is installed correctly and all of the components that use a service are working optimally.

* Third-Party Applicant Tracking Import
  + NeoGov New Hire
  + AppliTrack New Hire

**Licensing Configurations**

Some common licensing configurations may apply to your situation. Review this list and act on any item that applies.

* If not licensed to Financial Management, post a payroll and export the journal.

**Custom**

Tyler tests only the standard interfaces, processes and reports that are supplied with the software. It is important that you review your list of custom items and test each one, regardless of who initially developed it.

* Verify any custom FLSA calculations against a variety of examples.
* Spot check the custom longevity calculation, if applicable.
* Check the custom payroll export for content.
* Test any custom interfaces, processes or reports.
* If you are using the Third-Party Document Imaging Interface functionality, test the applicable areas to make sure documents are still accessible.