



When organizations change HRIS providers, access to legacy systems terminate typically at 30 days after the term notice. Post W2 production, vendors permanently destroy employee records.

BrekGroup will securely extract employee HRIS records prior to loss, load them into our reporting app and install onto your server, cloud, Citrix, or stand alone workstation. Your organization will then physically possess these important employee records **permanently**. Our reporting app is fully baked: excellent reporting, full encryption, multiple access levels, search, exporting to Excel, etc., available 24/7/365 forever, with no recurring fees of any type. We do all the work: the extraction, the processing, we even install and train your staff. Since 2006, we've provided easy access to over 7,000 clients and come recommended by virtually every payroll provider. *It's all we do.*

Utilize this document as a starting point with your team to ensure you have requested the records you'll need to protect your organization and service associate needs. We pull all years, all companies, all associates - both active and termed - for a given data type **in your project scope only**. Standard implementation time frame is about 16 weeks, but this can vary considerably. We will explain this in detail at our intro call, answer any questions you have and provide you with pricing on the spot.

Once we receive this completed form we schedule a brief call, after which we will provide you with a complete written proposal and/or an invoice. The vast majority of clients select the core data: **Check history, Timecards, Salary history, Job and Status history. However, we can pull any data that you need.**

Common Payroll / HR Data Types To Be Extracted - Please choose data types carefully	Check Off
Paycheck Detail History -Includes all EE's (active and termed) all controls, for one payroll system, company code, ee file# (and/or SSN), pay date, period end date (if present in your data otherwise calculated), check # (if present in your data), department paid (if present in your data), gross pay (calculated if not found in your data), net pay (calculated if not found in your data), hours and earnings (reg, ot, and other coded), deductions, EE taxes, memos (if present). Employer taxes if recorded as a memo.	<input type="checkbox"/>
Time Cards - All EE actual punch dates and times.	<input type="checkbox"/>
Time Card Audit Trail - edits made by supervisors to EE timecards.	<input type="checkbox"/>
Salary History - Amounts, dates, memos, notes, codes, amounts of increase.	<input type="checkbox"/>
Job History - Job titles, dates, memos, reasons codes.	<input type="checkbox"/>
Status History - Hire & term dates, term reason codes, ee status, memos, LOA, rehire	<input type="checkbox"/>
Benefit History - Plan name, deductible, effective date, major plan details.	<input type="checkbox"/>
Associate Demographic Information - Home address, email, home phone, clock number, marital status.	<input type="checkbox"/>
Performance History - Dates, supervisor notes. Requires a client / vendor supplied .Zip and index file for any attachments (.pdf, jpeg, etc.).	<input type="checkbox"/>
Electronic Documents - Various client electronic documents. Requires <i>vendor or client supplied zip file & index file.</i>	<input type="checkbox"/>
Data Purge Ability - enables the ability to purge data if you have a data retention policy.	<input type="checkbox"/>
Other Data: (write in here)	<input type="checkbox"/>

**Old HR Provider:	**Term Date:	** Approx # Total EE's:
New Payroll Provider	Go Live Date:	
Company Name & Address:		
#Years of History:	# Controls:	Hospital y/n
Executive Contact Info: (email and phone)		
Payroll Administrator Contact Info: (email and phone)		