



HR and Payroll Data Check (Employer Checklist)

Estimated time: 20–30 minutes per employee

Purpose: To identify gaps, mismatches, or outdated information across HR records, employment contracts, and payroll data.

Employee Review Details

Employee name: _____

Payroll ID (if applicable): _____

Job title: _____

Review completed by: _____

Review date: _____

How to Use This Checklist

- Start with one employee (any employee)
- Compare information held in:
 - Employment contract
 - HR records / personnel file
 - Payroll system
- Tick ✓ / X honestly
- Use the notes sections — they are important

Tip: If issues are identified for one employee, consider extending this check to others.

You do not need specialist HR or payroll knowledge to complete this checklist.



Section 1: Employee Personal Details

Confirm the following details are accurate and consistent across HR and payroll records:

- Full legal name
- Date of birth
- Home address
- Personal email address
- Contact telephone number
- National Insurance number

Notes / issues found:

Section 2: Emergency & Right-to-Work Records

Confirm HR records include:

- Next of kin name
- Next of kin relationship
- Next of kin contact details
- Right-to-work check completed
- Right-to-work documents retained
- Right-to-work check date recorded

Notes / issues found:



Section 3: Employment Status & Key Dates

Confirm the following are correct and align with payroll processing:

- Employment start date
- Employment status (employee / director / worker)
- Contract type (permanent / fixed-term / temporary)
- Probation period recorded (if applicable)
- Continuous service date (if different from start date)

Notes / issues found:

Section 4: Contract & Pay Details

Compare the employment contract to payroll setup:

- Job title matches payroll
- Pay type (salary / hourly) matches payroll
- Pay rate matches payroll
- Pay frequency is correct
- Contracted hours are correct
- Overtime terms understood and applied correctly

Notes / issues found:



Section 5: Working Pattern & Leave

Confirm HR and payroll records reflect:

- Working days and hours
- Hybrid / remote working arrangement (if applicable)
- Holiday entitlement (days or hours)
- Holiday year dates
- Carry-over rules understood
- Any contractual leave above statutory recorded

Notes / issues found:

Section 6: Payroll-Specific Checks

Confirm payroll is processing:

- Correct tax code
- Correct National Insurance category
- Student loan / postgraduate loan status (if applicable)
- Attachments of earnings set up correctly (if applicable)
- Statutory payments configured correctly (SSP, SMP, etc.)

Notes / issues found:



Section 7: Pension Information

Confirm pension details are accurate and aligned:

- Pension scheme name
- Auto-enrolment status correct
- Employer contribution rate correct
- Employee contribution rate correct
- Salary sacrifice applied correctly (if applicable)
- Pensionable pay definition correct

Notes / issues found:

Section 8: Changes & Audit Trail

Confirm changes are documented and traceable:

- Pay changes recorded
- Role or hours changes recorded
- Contract amendments issued where required
- Payroll updated at the correct time
- Evidence retained (email, letter, amendment)

Notes / issues found:



Section 9: Alignment Check (Critical)

Answer honestly:

- HR records match the employment contract
- Payroll data matches HR records
- Any differences are intentional and documented

If you answered **X** to any of the above, there may be payroll or compliance risk.

Section 10: What To Do If You Find Issues

If discrepancies are identified:

1. Confirm which record is correct
2. Update other records to match
3. Keep a clear note explaining the change
4. Check whether other employees may be affected

Small corrections now are far easier than resolving historical issues later.



A Note From Crystal HR & Payroll

This checklist reflects how we review HR and payroll data when supporting employers.

It helps to:

- Reduce payroll errors
- Improve compliance confidence
- Create clear audit trails
- Support smoother payroll processing

You do not need to change provider to benefit from this — it is simply good practice.

Data Protection Note

This checklist contains personal data and should be completed, stored, and retained in line with your data protection and GDPR obligations.

If you would like help reviewing or resolving anything this checklist highlights, our team is always happy to talk it through.