Your leave system switch checklist

Vacation Tracker

vacationtracker.io/blog/switch-leave-tracking-system/

Decisions

- [ ] Choose the switch date.
- [ ] Name the project owner and who signs off balances.
- [ ] Approve the leave rules, including location exceptions.
- [ ] Choose one place for next year's requests.

Setup

- [ ] Create locations and workweeks.
- [ ] Check next year's public holidays per location.
- [ ] Set leave types, accruals and reset dates.
- [ ] Set carryover caps and expiry dates.
- [ ] Assign approvers and backups.
- [ ] Test who sees what, including private leave types.

Balances

- [ ] Export a dated balance file.
- [ ] Separate carryover from this year's quota.
- [ ] Note whether future bookings are already deducted.
- [ ] Reconcile balances with payroll.
- [ ] Spot-check the five tricky people.
- [ ] Check approved and pending requests separately.

People

- [ ] Run the pilot with a non-technical colleague.
- [ ] Send the announcement with a support contact.
- [ ] Show employees their opening balance and the deadline to flag errors.
- [ ] Walk managers through approvals and holiday cover.

Launch day

- [ ] Freeze the old file and save the final export.
- [ ] Apply late changes and remove test bookings.
- [ ] Do a final balance check.
- [ ] Make the old tracker read-only.

First two weeks

- [ ] Check unanswered requests and backup cover daily.
- [ ] Answer balance questions in the new system.
- [ ] Check the first payroll handoff.
- [ ] Retire the old booking process.