

The Vendor-Exit Data Checklist

What to export before you terminate any HR, payroll, or time system contract.

A free resource from Paystoric — deliberately vendor-neutral. Use it whether or not you ever talk to us.

The one rule: export everything before you give notice. Once you stop paying, access gets slower, more expensive, or disappears entirely — and your legal retention obligations don't care.

1 Payroll records FLSA: 3 yrs · IRS: 4 yrs · NY: 6 yrs · CA: 4 yrs

- ☐ Pay registers for every pay period, all years available — not just YTD summaries
- ☐ Individual pay statements/stubs (employee-level PDFs if offered — these are what former employees request)
- ☐ Earnings detail by code (regular, OT, bonus, commission, retro) — summary totals are NOT enough to defend a wage claim
- ☐ Deduction detail by code, including garnishments and child-support ledgers
- ☐ Direct deposit and payment history
- ☐ All tax filings: 941s, 940s, state returns, W-2s/W-2cs, 1099s — every year available
- ☐ Tax payment/deposit confirmations
- ☐ Year-end reconciliation reports

2 Time & attendance FLSA: 2 yrs · litigation reality: as long as possible

- ☐ Punch-level detail (daily in/out times) — weekly totals cannot rebut an employee's estimate in a wage dispute (Anderson v. Mt. Clemens Pottery)
- ☐ Schedules and shift assignments
- ☐ Meal/rest break records (critical for CA)
- ☐ Overtime approvals and edits/adjustment audit trails (who changed a punch, when)
- ☐ PTO/leave accrual ledgers and balances over time — not just current balances

3 Employee records ADEA/Title VII: 1–3 yrs; longer once any claim exists

- ☐ Full employee profiles incl. all historical values (job, comp, manager, location changes with effective dates)
- ☐ Compensation history with effective dates and reasons
- ☐ I-9s and supporting docs (3 yrs after hire or 1 yr after term — whichever is later)
- ☐ W-4s and state withholding elections