

Make HR information ready to use

Use one copy per portal or review. Tick only after checking the content, configuration or test evidence.

Portal / organisation:

Evaluator / review date:

Employee groups, locations and three priority HR tasks:

01 Identify employee needs

- ☐ Review recurring HR questions and select common tasks to test from start to finish.
- ☐ Include frontline, remote and office employees, with different devices and access needs.
- ☐ Record a baseline: correct answers, completed tasks, time taken and help required.

02 Audit policies and supporting documents

- ☐ Identify one approved source per policy; archive and clearly label superseded versions.
- ☐ Assign an accountable owner, effective date and review date to each key policy.
- ☐ Use familiar titles and check that guidance links to current policies and forms.
- ☐ Test document-content search; apply OCR to scans where needed and check text accuracy.

Check access, workflows and connections

Validate real employee journeys. Record limitations and unresolved questions before rollout.

03 Protect information and support access

- ☐ Separate general guidance from confidential records; confirm role-based access.
- ☐ Test search titles, snippets, previews and direct links with representative accounts.
- ☐ Check mobile sign-in, readable documents, usable forms and accessibility needs.
- ☐ Define access changes for new starters, role changes and leavers.

04 Connect guidance to the right action

- ☐ Link policies to the relevant form, required information and approval route.
- ☐ Confirm request receipt, useful status updates and a private route to HR support.
- ☐ Identify which system owns policy, employee and payroll data; verify integration scope.
- ☐ Test authorised updates, failed transfers and corrections in connected systems.
- ☐ Confirm subscription, migration, integration, training and ongoing administration costs.

Open questions / evidence needed / accountable owner:

Test, improve and approve the rollout

Ask employees to complete three common HR tasks. Observe difficulties without guiding their searches.

05 Complete acceptance checks

- ☐ Test finding a current policy, locating the right form and completing a request.
- ☐ Repeat on desktop and mobile; record incorrect answers, abandoned tasks and assistance.
- ☐ Resolve critical content, access and workflow issues; assign owners to remaining actions.
- ☐ Give employees short task-based guidance and an obvious support contact.

06 Keep the service useful after launch

- ☐ Assign owners for policy reviews, broken links, feedback and failed-search investigations.
- ☐ Set a follow-up date and repeat the baseline tasks with comparable employee groups.
- ☐ Review completion, accuracy and feedback; fewer HR enquiries alone do not prove success.

Decision: ☐ Ready to roll out ☐ Resolve issues first ☐ Reassess approach

Decision owner / priority fixes / next review date:

Prioritise accurate answers, appropriate access and successful tasks before adding more features.
