Schedule of Go Live Ready Benchmarks

Last Revision Date: 6/24/2025

This Schedule outlines the specific deliverables and responsibilities for your Go-Live Ready implementation.

Initial MBC Launch

Topic or Focus	Deliverable	Who's Responsible
Group Set-up	Create group in MBC, assign one Group Administrator and one	MBC
Initial Launch Call	Conduct launch call (est. one 60-minute session) and update	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Manage Permissions	Conduct training (est. one 60-minute session), Set-up 1	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
	Set-up remainder of permissions prior to next training session	Customer
Import/Manage Census	Conduct training (est. one 60-minute session)	MBC + Customer
	Import one initial census file during training (if not previously	Customer
Implementation Wrap-up	Send wrap-up email and refer to support	MBC

This refresher can be added to any implementation, as needed, just copy and paste into the desired implementation:

Review concepts from Initial MBC Launch (optional)	Conduct training (est. one 60-minute session), if needed	MBC + Customer
	Send follow-up email with instructions for next steps	MBC

MySmartHire Applicant Tracking

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct launch call (est. one 60-minute session) and update	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
	Send all current applications and documents	Customer
Set-up Career Page & Applications	Build Career Page and Application(s)	MBC
	Send follow-up email with instructions for next steps	MBC
Test Career Page & Applications Set-up	Test using Stealth Links	Customer
	Make Revisions based on testing	MBC
	Send follow-up email with instructions for next steps	MBC
Set-up Requisitions/eForms (optional)	Send Requisitions and eForms documents (if applicable)	Customer
	Build Requisitions/eForms	MBC
	Send follow-up email with instructions for next steps	MBC
Test Requisitions/eForms Set-up	Test Requisitions/eForms	Customer
	Make revisions based on testing	MBC
	Send follow-up email with instructions for next steps	MBC
Set-up References/Surveys (optional)	Send Reference/Survey Questions (if applicable)	Customer
	Build References/Surveys	MBC
	Send follow-up email with instructions for next steps	MBC
Test References/Surveys Set-up	Test Refs/Surveys and Customer Acknowledgement	Customer
	Make revisions based on testing	MBC
	Send follow-up email with instructions for next steps	MBC
Set-up SSO & API (optional)	Set-up SSO	MBC + Customer
	Create API	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Admin Training	Admin Training (est. one 60-minute session)	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC
Hiring/Non-posting Manager Training (optional)	Hiring /Non-Posting Manager Training (estimated one 30-minute	MBC + Customer

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MyTaskManager (Onboarding/Offboarding/Ongoing)

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps w/ catalog	MBC
	Send existing checklist(s) and which tasks from the catalog to	Customer
Set-up Shared Tasks and Initial Tasks	Create and customize shared tasks (I-9, W-2, State Withholding,	MBC
	Create 1 task of each type: Acknowledgement, Submittal, PDF	MBC
MTM Dashboard Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
MTM Task Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
	Create 1 task of each type: Acknowledgement, Submittal, PDF	Customer
MTM Workflow Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
	Create 1 workflow prior to next training session	Customer
MTM Invitations Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
MTM Set-up Finalization	Create all remaining tasks and organize in workflows prior to	Customer
Test Set-up	Test 1 Workflow and Customer Acknowledgement	Customer
	Make Revisions based on testing	MBC + Customer
Two-week Follow-up	Send follow-up email with instructions for next steps*	MBC
	Address questions, feedback, etc. as needed	MBC
	Send wrap-up email and refer to support	MBC
**Customer will be considered "Go Live Ready" once they receive the follow-up email*		
***Customer may elect to have MBC build-out tasks and workflows, please inquire about our hourly rate and creating an updated SOW*		

MyTaskManager Plus (Dynamic Documents)

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps w/ catalog	MBC
	Send existing document	Customer
Set-up Initial Document Template	Create one Personnel Record category	MBC
	Create and customize document template	MBC
Dynamic Document Template Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Dynamic Document Training	Conduct training (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Dynamic Document Testing and Refinement	Customer will test the Dynamic Document and note any issues or	Customer
	Conduct review session (est. one 45-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	Customer
Dynamic Document Set-up Finalization	Create all remaining documents prior to testing**	Customer
Test Set-up	Test 1 Document and Customer Acknowledgement	Customer
	Make Revisions based on testing	MBC + Customer
Two-week Follow-up	Send follow-up email with instructions for next steps*	MBC
	Address questions, feedback, etc. as needed	MBC
	Send wrap-up email and refer to support	MBC
**Customer will be considered "Go Live Ready" once they receive the follow-up email*		
***Customer may elect to have MBC build-out documents, please inquire about our hourly rate and creating an updated SOW*		

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Personnel/Group Records

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Document Libraries

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
User Lists & Notifications (Optional)	Conduct training (est. one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Survey App

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
User Lists & Notifications (Optional)	Conduct training (est. one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Electronic Notices

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
User Lists & Notifications (Optional)	Conduct training (est. one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Time & Attendance Essentials

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct implementation call (est. one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Discovery	Complete Discovery Document	Customer
	Review Completed Discovery Document	MBC
	Mutual Acknowledgement of Discovery Document Completion	MBC + Customer
Initial Set-up	Complete Initial Set-up according to Discovery Document	MBC
	Conduct training (est. one 2-hour session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Testing Set-up	Test Clocking In/Out, Approver View, Payroll View, Reporting	Customer
	Refine set-up (if applicable)	MBC
Processing Periods & Payroll Imports	Conduct training (estimated one 60-minute session)	MBC + Customer
	Refine set-up (if applicable)	MBC
Wrap Up	Send wrap-up email and refer to support	MBC

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Pay Info

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Launch Announcement	Send 1 announcement to employees prior to next training session	Customer
Process First Import	Conduct training (est. one 20-minute session) and successfully	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Topic or Focus	Deliverable	Who's Responsible
Initial Setup	Notify payroll vendor that API needs to be setup	MBC
	Payroll vendor works with customer to setup API	Vendor + Customer
	Payroll vendor notifies MBC setup is ready to test	Vendor
	Conduct testing	MBC
Initial Implementation Call	Conduct training (est. one 60-minute session)	MBC + Customer
Launch Announcement (optional)	Send 1 announcement to employees prior to next payroll (if	Customer
Migrate notification settings (optional)	Perform notification settings migration (if applicable)	MBC
Wrap Up	Send wrap-up email and refer to support	MBC

ACA and/or W-2 eDelivery

Topic or Focus	Deliverable	Who's Responsible
Initial Implementation	Conduct training (est. one 60-minute session)Topics: How to	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
	Update consent verbiage and send back to MBC	Customer
	Create and publish Consent	MBC
	Send wrap-up email with instructions for next steps*	MBC
Launch Announcement (optional)	Send 1 announcement to employees	Customer
Prepare for W-2 Delivery	(in December) Send follow-up email with instructions to remind	MBC
	Send 1 reminder to employees (optional)	Customer
	Review "How To" video and documentation	Customer
Complete W-2 Delivery	Successfully Import 1st W-2 File	Customer
	Successfully Deliver Balance via manual self-print or Print & Mail	Customer
	Successfully release non-eDelivered forms to be visible in portal	Customer
**Customer will be considered "Go Live Ready" once they receive the follow-up email*		

Education & Training - Courses

Topic or Focus	Deliverable	Who's Responsible
Intro to Online Courses	Conduct training (estimated one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps	MBC
Courses and Assignments	Conduct training (estimated one 60-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps, if needed	MBC
User Lists, Notifications, Reporting	Conduct training (estimated one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

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Education & Training - Events

Topic or Focus	Deliverable	Who's Responsible
Intro to Events	Conduct training (estimated one 60- to 90-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps, if needed	MBC
Evaluations	Conduct training (estimated one 60-minute session), if needed	MBC + Customer
	Send follow-up email with instructions for next steps, if needed	MBC
User Lists and Notifications	Conduct training (estimated one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

Educ & Training - Professional Dev

Topic or Focus	Deliverable	Who's Responsible
Intro to Professional Development	Conduct training (estimated one 60- to 90-minute session)	MBC + Customer
	Send follow-up email with instructions for next steps, if needed	MBC
User Lists & Notifications	Conduct training (estimated one 60-minute session), if needed	MBC + Customer
Wrap Up	Send wrap-up email and refer to support	MBC

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