Ciphr Safeguarding & Employee Checks go-live readiness guide

July 2026 | V1.0

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Purpose

This go-live readiness guide is for internal use by your organisation. It is designed to help you check that everything is in place before you launch the Ciphr Safeguarding & Employee Checks module.

Work through each section and complete every action. Doing so will give you confidence in a smooth rollout.

Use the Ciphr knowledge base articles and the insights from your consultancy sessions to guide you through each item. Go live only when you are satisfied that your system is fully prepared. The decision of when to go live is entirely yours and Ciphr does not set your go-live date.

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Template configuration

Templates are the foundation of the Safeguarding & Employee Checks module. Before go-live, confirm that all templates have been created and are correctly configured with the required field types.

Navigate to **Employee Checks and Compliance > Employee Checks and Compliance Configuration > Safeguarding & Employee Checks Template**

Check
Confirm that all required safeguarding templates have been created in the system.
Verify that each template includes the correct field types: date, free text, dropdown, toggle, and document upload as required.
Check that dropdown fields display only the configured options and that values are correct.
Confirm that templates configured with “Read only after insert” are set correctly so they lock upon completion.
Verify that templates requiring manager or head sign-off have the approval configured.

Compliance data recording

Accurate recording of compliance data against employee records is central to the module. Carry out the following checks to confirm that data entry works correctly for all user roles.

Navigate to **Employee Checks and Compliance > Safeguarding & Employee Checks**

Check
Confirm that HR users can navigate to Safeguarding & Employee Checks and insert a new record against an employee.
Where self-service is enabled, confirm that managers and employees can record compliance data against their own/subordinate profile.
Check that completed records are displayed correctly on the employee record after saving.
Verify that document upload fields allow file attachment (e.g. PDF) and that uploaded files are accessible from the employee record.
Confirm that document categories are configured and that uploaded files are saved under the correct category.

Bulk operations & categories

Categories allow multiple templates to be grouped and applied in bulk. Check that categories are configured correctly and that bulk insert functionality works as expected.

Navigate to **Employee Checks and Compliance > Safeguarding & Employee Checks**

Check
Confirm that template categories have been created and that all relevant templates are assigned to the correct category.
Verify that the Bulk Insert function correctly applies all templates within a selected category to an employee record.

Job role assignment

Templates can be attached to job roles so that they are automatically assigned when an employee is placed in that role. Confirm that job role assignments are configured before go-live.

Navigate to **Job, Pay & Reward > Job and Pay Configuration > Jobs**

Check
Confirm that all relevant safeguarding categories have been attached to the appropriate job roles in the system.
Assign a test employee to a job role and verify that the linked templates automatically appear on their Safeguarding & Employee Checks record.

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