mBurse

IT APPROVAL CHECKLIST · 2026

Is the reimbursement program ready for IT sign-off?

Twenty checks across data, identity, integrations, the mobile app, and vendor security. Complete them before employees install the app.

Program / vendor _____ IT owner _____ Target launch date _____

		CHECK	OWNER AND DATE
Data		Document what the program collects and who can see it.	
☐	1	Data types, storage location, access, and retention are documented	
☐	2	Real-time location is never visible to managers or admins	
☐	3	Personal trips are excluded or hidden by default	
☐	4	Legal has reviewed privacy obligations for the states where employees work	
Identity and access		Central sign-in and automatic accounts.	
☐	5	SSO works through our identity provider (SAML 2.0 or OIDC)	
☐	6	MFA is enforced through the identity provider	
☐	7	Accounts are created, updated, and removed automatically (SCIM or HRIS sync)	
☐	8	Roles follow least privilege, and an access review is scheduled	
Integrations		Every connection documented and tested.	
☐	9	HRIS fields and the source of truth for each are agreed	
☐	10	Payroll or expense output format and schedule are agreed	
☐	11	Integration failures alert a named owner	
☐	12	A full trip-to-payroll cycle passed in testing	
Mobile app		Works on the phones drivers carry.	
☐	13	Device policy (BYOD, company phones, or both) is set	
☐	14	Supported iOS and Android versions are confirmed and tested	
☐	15	App permissions are explained to employees	
☐	16	Business-hours recording, pause, and edit-before-submit are on	
Vendor security and support		Documents on file, support routes agreed.	
☐	17	SOC 2 Type II report or ISO 27001 certificate is reviewed	
☐	18	Penetration test summary and encryption details are on file	
☐	19	Subprocessors, breach notification, retention, and exit terms are in the contract	
☐	20	Support routes for IT, HR, payroll, and the vendor are agreed	

General information, not legal advice.