EHS Software Comparison Checklist

Compliance Verification Guide for
EHS Management Software

Practical checklist to simplify your selection process

This EHS Software Comparison Checklist is designed to help organizations evaluate software solutions across critical areas such as functionality, usability, integration readiness, and long-term value. It provides a clear, structured framework to ensure no important factor is overlooked when comparing vendors.

Use this checklist to standardize your assessments, minimize bias, and make smarter, more confident decisions. It's a practical tool to simplify the vendor selection process and empower your team to choose the best solution for your organization.

1. Core EHS Features

	Check Points	Notes
☐	**Incident Management** Ability to capture, investigate, classify, and track incidents from submission to closure.	
☐	**Risk & Hazard Assessment** Tools to identify hazards, score risks, apply controls, and monitor trends over time.	
☐	**Audit & Inspection Management** Digital checklists, automated scheduling, evidence uploads, and corrective action tracking.	
☐	**Corrective & Preventive Actions (CAPA)** Assign, track, and verify corrective actions to ensure issues are resolved effectively.	
☐	**Environmental & Sustainability Tracking** Monitor emissions, waste, resource use, and support ESG reporting needs.	
☐	**Training & Certification Tracking** Keep records of employee training, expiry dates, and compliance requirements.	

2. Dashboards, Reporting & Analytics

	Check Points	Notes
☐	**Real-Time Dashboards** Instant visibility into safety KPIs, compliance performance, and open actions.	
☐	**Custom Report Builder** Ability to create tailored reports without complex tools or technical expertise.	
☐	**Automated Reporting** Schedule recurring reports sent to supervisors, managers, or regulators.	
☐	**Trend & Root-Cause Analysis** Helps identify patterns and underlying issues to support proactive prevention.	
☐	**Predictive Analytics** AI-powered insights that highlight high-risk areas or potential future incidents.	

3. Compliance & Regulatory Support

	Check Points	Notes
☐	**Compliance Calendar & Alerts** Automated reminders for inspection deadlines, permit renewals, and policy updates.	
☐	**Regulatory Forms & Templates** Prebuilt checklists aligned with OSHA, ISO, EPA, and industry standards.	

	Check Points	Notes
☐	**Document Control** Centralized, version-controlled library for policies, procedures, and SOPs.	
☐	**Audit-Ready Documentation** Organized evidence and records available instantly during inspections.	
☐	**Permit & Certification Management** Track permits, approvals, and certification expiry dates across the organization.	

4. Mobile Capability & Field Usability

	Check Points	Notes
☐	**Mobile App Access** Allows field teams to conduct inspections, submit reports, and view tasks on the go.	
☐	**Offline Functionality** Record incidents or complete forms even without internet, syncing once online.	
☐	**Photo, Video & File Attachments** Capture onsite evidence directly from mobile devices.	
☐	**GPS & Timestamp Features** Enhances accuracy and validation for field activities.	
☐	**Simple, Field-Friendly Interface** Designed for quick data entry in busy or high-risk environments.	

5. Workflow Automation & Efficiency

	Check Points	Notes
☐	**Configurable Workflows** Customize approval routes, notifications, and task assignments to match processes.	
☐	**Automatic Notifications** Sends reminders for overdue tasks, unresolved incidents, or audit findings.	
☐	**Custom Forms & Checklists** Create or modify forms easily without technical support.	
☐	**Role-Based Access Control** Restrict access based on job role to improve security and clarity.	
☐	**Multi-Step Approvals** Supports complex review and approval processes.	

6. System Integration & Data Management

	Check Points	Notes
☐	**Integration with ERP, HRIS or Asset Systems** Ensures consistent data across multiple business systems.	
☐	**API Availability** Enables custom integrations and automated data flows.	
☐	**Data Import & Migration Support** Templates and tools to help bring existing records into the new system.	

	Check Points	Notes
☐	**Secure Cloud Hosting** Includes encryption, backups, uptime reliability, and disaster recovery.	
☐	**Data Export Options** Allows exporting reports and datasets for analysis or compliance needs.	

7. Training, Support & Adoption

	Check Points	Notes
☐	**Administrator Training** Structured training to help administrators manage and configure the system.	
☐	**End-User Training Materials** Videos, guides, walkthroughs, and quick-reference documents for easy adoption.	
☐	**Dedicated Customer Support** Access to knowledgeable support staff for troubleshooting and optimization.	
☐	**Help Desk & Ticketing System** Clear response timelines and escalation process for urgent issues.	
☐	**User Adoption Monitoring** Tools to track user activity, training completion, and engagement levels.	

8. Scalability & Future Readiness

	Check Points	Notes
☐	**Multi-Location Support** Reliable performance for organizations with multiple sites or teams.	
☐	**Modular Platform** Ability to add new modules as needs change or expand.	
☐	**Performance at Scale** Handles large user volumes and high data inputs without lag.	
☐	**Vendor Product Roadmap** Clear updates and ongoing improvements aligned with industry needs.	
☐	**Long-Term Vendor Reliability** Stable vendor with proven experience in EHS software.	

9. Cost & Value Alignment

	Check Points	Notes
☐	**Transparent Pricing Structure** Clear breakdown of licensing, modules, users, and support costs.	
☐	**Implementation & Setup Costs** Covers training, configuration, migration, and ongoing service fees.	

	Check Points	Notes
☐	**Support & Maintenance Included** Ensures updates and technical assistance are part of the package.	
☐	**Flexible Contract Options** Annual, multi-year, or enterprise-wide options based on your needs.	
☐	**Measured ROI Potential** Evaluate efficiency gains, reduced incidents, and improved compliance.	

10. Final Selection Criteria

	Check Points	Notes
☐	**Meets Functional Requirements** Covers the necessary operational and compliance needs.	
☐	**Easy for Teams to Use** User-friendly design that reduces training time and improves adoption.	
☐	**Works with Existing Systems** Integrates well with current tools and workflows.	
☐	**Strong Support & Vendor Partnership** Vendor is responsive, experienced, and committed to long-term success.	
☐	**Supports Long-Term Strategy** Aligns with organizational growth, compliance, and digital transformation goals.	