

SIS Evaluation Checklist for Higher Ed Institutions

Use this checklist to ensure the SIS supports the needs of all stakeholders. Ask your team what other requirements they may have to add to the list.

System Integration & IT Requirements

- ☐ Seamless integration with LMS, CRM, financial aid & HR systems
- ☐ API availability for custom integrations
- ☐ Ownership over your data
- ☐ Data security, encryption & compliance readiness
- ☐ Cloud-based for easy scalability & reduced maintenance
- ☐ Role-based access control
- ☐ Uptime guarantees & disaster recovery

Financial Aid & Administrative Needs

- ☐ Automated billing & payment workflows
- ☐ Real-time financial dashboards
- ☐ Title IV & other compliance support
- ☐ Custom audit-ready reports
- ☐ Integration with accounting tools
- ☐ Automated aid packaging, tracking & disbursement

Reporting & Compliance

- ☐ IPEDS, Title IV and 90/10 reports
- ☐ Warning/alert systems for retention & performance
- ☐ State and federal export-ready formats

Academic & Student Support Features

- ☐ Degree audits, plan of study & graduation tracking
- ☐ Automated & shopping-cart style course registration
- ☐ Attendance tracking & LMS integration
- ☐ Student & advisor self-service portals

User Experience & Support

- ☐ Mobile-responsive UI
- ☐ Custom dashboards by role
- ☐ Comprehensive training & support
- ☐ Regular software updates

Cost & ROI

- ☐ Transparent pricing model
- ☐ Fast implementation timeline
- ☐ Scalable with enrollment growth
- ☐ Long-term ROI

Vendor Trust & Experience

- ☐ References from similar institutions
- ☐ Hands-on demo or pilot program
- ☐ Higher ed market experience
- ☐ Long-term product roadmap and support