



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.	

☐	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.	

☐	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.	

☐	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.	