



HOW CEREBRAL PALSY ALLIANCE ARE REDEFINING PAYROLL MANAGEMENT

CUSTOMER SUCCESS STORY

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Recently, we heard from [Daniel Watson](#) (Senior Payroll Manager at [Cerebral Palsy Alliance](#)) to understand how he is setting a new standard for operational excellence in payroll.

In this article, we will outline how Daniel has transformed his payroll department with the use of Paytools, enabling his team to:



Reduce their time to run payroll process by an entire day



Embed better transparency and governance practices across payroll



Significantly improve team development and onboarding for new starters

About Cerebral Palsy Alliance

Cerebral Palsy Alliance (Est. 1945) is a non-profit organisation with 2,700 employees. Their team is dedicated to enhancing the lives of individuals with cerebral palsy.

The CPA payroll team, consisting of seven professionals, handles complex salary packaging and runs on a fortnightly pay cycle.

They use a combination of Workday, Roster Space and Preceda as their core systems, as well as Microsoft Teams for communication and SharePoint for document/file management.



Payroll challenges CPA were looking to solve

- **No shared calendar:** And no 'payroll' calendar to show what needed to be done and when, it was all just in peoples heads.
- **Manual Excel checklists:** Including a pay run checklist that took 4 days to complete.
- **Payroll processes on paper:** All documentation was in Word and stored in one person's OneDrive. This made it hard to find and hard to control or update.
- **No audit trail:** In terms of when processes were being completed and by whom. They also couldn't track when process changes were made and why.
- **Informal issue management:** As basic as someone having to remember to send an email, which meant no issue register or details about how and when they were resolved.
- **Risk management:** Managed via an excel spreadsheet and wasn't very effective.

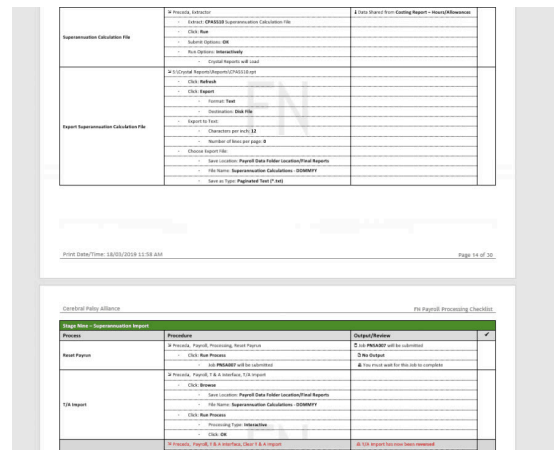
Pay run processing

How payroll was operating before

6 months ago, CPA's payroll process was managed through a 30-page printed Word checklist (originally created in 2017), requiring manual updates and physical handling.

This out-dated way of working made the pay run process heavily reliant on memory and vulnerable to error, especially when key team members were on leave or had moved on.

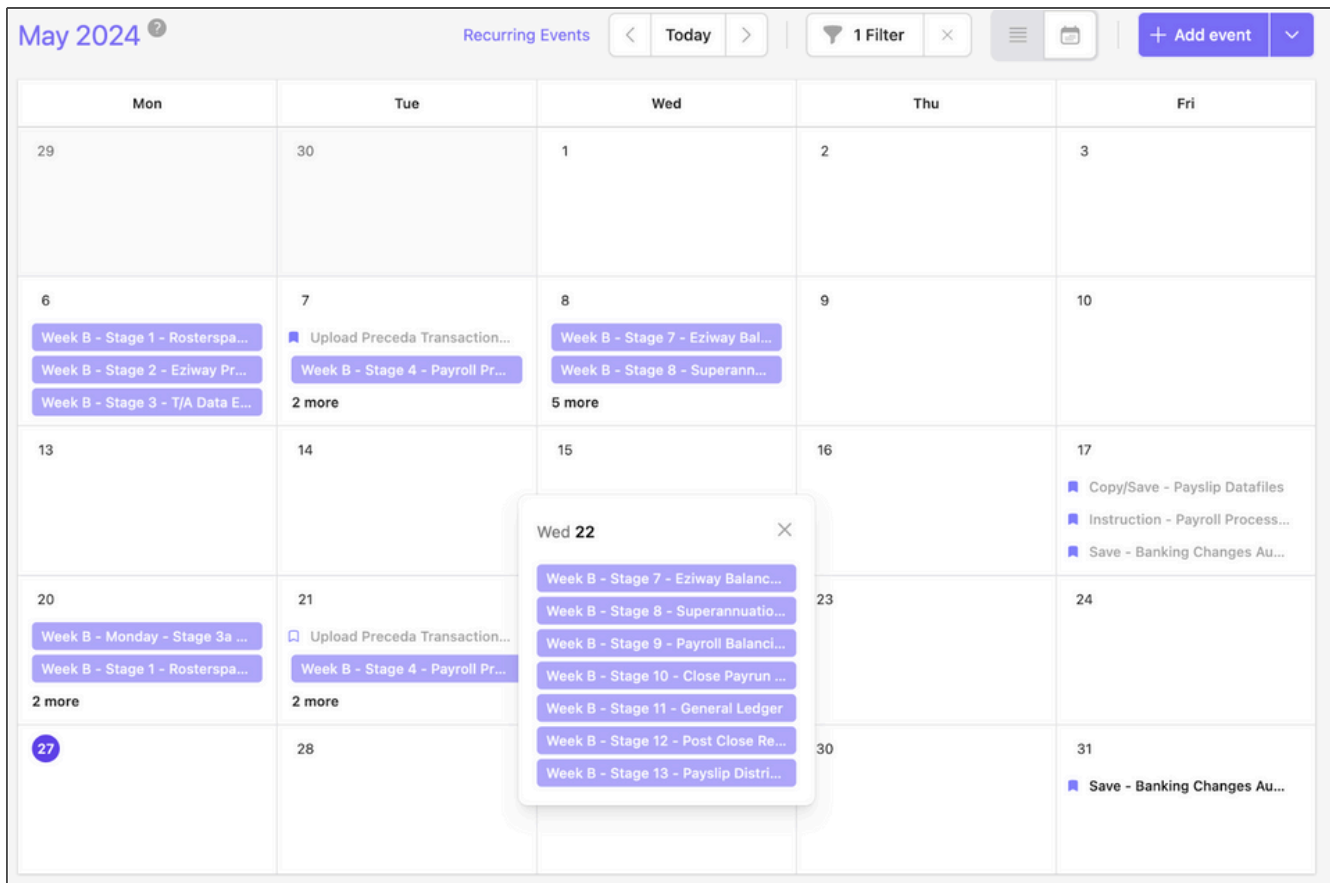
After being introduced to Paytools work management software, Daniel realised he could boost payroll efficiency quickly and without a huge investment - which then drove a business improvement initiative for CPA.



How payroll management looks now

CPA started their journey with Paytools about 6 months ago and has since transformed its pay run process. They have replaced their outdated manual checklist with a seamless online schedule with built in recurring events.

They now use a live, online calendar that includes all the tasks involved with the pay run, as well as other critical events that need to occur outside of the payroll process. Now the entire CPA payroll team is confident that they know exactly what needs to be done and when.



Before Paytools, we used to have to stay back until 7 pm on pay days to complete all tasks. Now we can confidently leave at 5 pm knowing everything has been completed accurately.

- Dan Watson, Senior Manager - Payroll



Flexible viewing options have allowed their team to have their assigned activities on a daily, weekly, or monthly basis. Here is an example of their weekly work schedule

Overdue			
Yesterday	<input type="radio"/> All day	Event Acknowledgement on Week B - Payroll Preparation - Uniform ... - 1 check to be completed	>
	<input type="radio"/> All day	Upload Preceda Transactions to Eziway on Week B - Stage 6 - Preceda Exception Check/Correction	>
Today	<input checked="" type="radio"/> 9:00am	Case Management - Daily Case Assignment (Morning) Completed	BY EZ JC LK +2 users >
	<input type="radio"/> 12:00pm	Case Management - Daily Case Assignment (Midday) 1 check	BY EZ JC LK +2 users >
	<input type="radio"/> 4:00pm	Case Management - Daily Case Assignment (Afternoon) 1 check	BY EZ JC LK +2 users >
	<input checked="" type="radio"/> All day	Week B - Stage 7 - Eziway Balance Check Completed	BY EZ JC LK +2 users >
	<input checked="" type="radio"/> All day	Week B - Stage 8 - Superannuation Calculation/Import Completed	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Stage 9 - Payroll Balancing and EFT 36 checks	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Stage 10 - Close Payrun and Group Tax 26 checks	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Stage 11 - General Ledger 12 checks	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Stage 12 - Post Close Reporting 25 checks	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Stage 13 - Payslip Distribution 28 checks	BY EZ JC LK +2 users >
	<input checked="" type="radio"/> All day	Week B - Wednesday - Workday Integration - Core Completed	SL >
Tomorrow	<input type="radio"/> 9:00am	Case Management - Daily Case Assignment (Morning) 1 check	BY EZ JC LK +2 users >
	<input type="radio"/> 12:00pm	Case Management - Daily Case Assignment (Midday) 1 check	BY EZ JC LK +2 users >
	<input type="radio"/> 4:00pm	Case Management - Daily Case Assignment (Afternoon) 1 check	BY EZ JC LK +2 users >
	<input type="radio"/> All day	Week B - Centrelink Data Upload 1 check	BY >

This provides information such as start time, who is responsible and highlights any overdue tasks that need attention first. When you create an event in Paytools you can also assign categories to it. You can then use these filters through the system to show you only the information you want to see.

Issue Management

The integration of Paytools has made issue management more proactive and structured. The system allows their team to automatically log and categorise all payroll-related issues, ensuring that they are auditable and actioned quickly.

This has helped to cull another Excel sheet and has helped to encourage continuous improvement and enhanced compliance.

[Dashboard](#)

Issue Register

[Export](#) [5 Filters](#) [Raise an issue](#)

An issue register keeps track of issues and risks raised by payroll - an essential governance practice. Issues can be raised from events and checks or directly through this page.

Sorted by newest ▾

- CPA-1090

Run/Execute - Superannuation Setup Error Report (CPA_PAB_009_A) 1

Payroll Processing Payroll Processing - Stage 3

Low priority ➤

Closed on Apr 23, 2024
- CPA-1083

Check - Superannuation Setup Error Report (CPA_PAB_009_A)

Payroll Processing Payroll Processing - Stage 3

Low priority ➤

Closed on Apr 16, 2024
- CPA-1082

Run/Execute - Reverse Post Payrun [Restricted Check] 1

Payroll Processing Payroll Processing - Stage 3

Low priority ➤

Closed on Apr 9, 2024
- CPA-1077

Run/Execute - Superannuation Recipient Audit Report (CPA5507A) 1

Payroll Processing Payroll Processing - Stage 3

Low priority ➤

Closed on Mar 26, 2024

[Dashboard](#) > [Run/Execute - Superannuation..](#) > [Issue](#)

Run/Execute - Superannuation Setup Error Report (CPA_PAB_009_A)

CPA-1090 opened by Sarah Li

Closed

Low priority

Raised on Apr 22, 2024

Resolve by Apr 22, 2024

Hi Daniel,

Not sure how this employee's sal sac set-up issue is. However, This employee's data shown in the Superannuation set-up error report 2.

Could you please help check and let me know if I can do something to resolve this issue?

Thank you.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Status	ID Numbe	Full Name	Hire Date	For Period Ending	Pay Method	Hours or A/D	Cod Code	Description	Record ID	A/D Class	Recipient	Recipient Name
2	A			11/04/2022	16/07/2023	B	S9		CHOICE Sal Sac \$	E	U		
3													
4													

Village > Pay & Benefits - Payroll_Processing > FN > 2024 > FN22_PE21.04.2024 > Rosterspace

Search Rosterspace

Name	Status	Date modified	Type	Size
Exceptions by Company	🔵	22/04/2024 2:48 PM	File folder	
Hunter Timesheets	🔵	19/04/2024 4:35 PM	File folder	
CPA-Double Payment Check Report PE21.04.2024 LK Checked	🟢	22/04/2024 12:51 PM	Microsoft Excel W...	16 KB
CPA-Roster Period Audit Report PE21.04.2024	🟢	22/04/2024 12:39 PM	Microsoft Excel W...	14 KB

Team Learning

The CPA team only recently started to use the Learning and Development module as part of their increased investment into training. Daniel has found it to be a great way to know what courses are available (thanks to the course library), as well as easily track who and when one of his team members attended.

This proactive approach to learning and development not only enhances individual performance but also strengthens the overall capabilities of the team, aligning with CPA's commitment to excellence. For more insights on best practices for payroll learning and development, check out our [blog](#).

Learning and Development

Team Tracking Course Library + Add Attendance

Initials	Name	Role	Learning Events
DW	Daniel Watson	Senior Manager	No learning events.
OP	Fred Jones	Pay and Benefits Manager	No learning events.
LK	Lucy Stevens	Pay and Benefits Adminis...	1 learning event Last event was about 1 month ago
SL	Brad Verne	Pay and Benefits Adminis...	No learning events.
EZ	Jane Grey	Pay and Benefits Adminis...	No learning events.
BY	Sam Knott	Pay and Benefits Adminis...	No learning events.
JC	Prajna Singh	Pay and Benefits Adminis...	No learning events.

Lucy Stevens
Pay and Benefits Administrator

Attended events

- Terminations Masterclass**
Wed, May 15
AUSTRALIAN PAYROLL ASSOCIATION

A huge benefit of Paytools has been the improvement in team development and onboarding for new starters. What once took 6 months to perfect, can now be done confidently in just 4 weeks!

— Dan Watson, Senior Manager - Payroll



Risk and obligation management

Risk management has also seen a major upgrade, shifting from storing risks in excel (where they were very rarely reviewed or updated) into a proactive process with response plans. This allows us the CPA team to document how they are expected to respond if there is an incident.

The screenshot shows a 'Risks' dashboard with the following items:

- Files Failing to Save (OneDrive/SharePoint)**: High Risk, Owned by Daniel Watson. 1 response plan, 1 check, 1 comment. Category: Risk Management - Operations.
- Leave Applications Not Being Processed**: High Risk, Owned by Daniel Watson. 1 response plan, 1 check, 1 comment. Category: Risk Management - General.
- Part Time Employees - Contract vs Actual Hours**: High Risk. 1 response plan, 1 check, 1 comment. Category: Risk Management - General.
- Annualised Salary Review Process**: Moderate Risk. 1 response plan, 1 check. Category: Risk Management - General.

They also use the obligation library to record and schedule less regular and non-BAU events. For example, they created an obligation to remind them to apply the Pay Rate increase process each year.

This was a significant improvement for CPA, as most of these events were never documented and were rarely at the forefront of anyone's mind. With each obligation you can clearly see the type of obligation, the jurisdiction it belongs to and any attachments.

The screenshot shows an 'Obligation Library' dashboard with the following items:

- Super Guarantee - Ordinary Times Earnings (OTE) Revi...**: Legislation, Moderate Risk. Next review: Jul 1, 2024. Description: Extract all Pay Componets from Payroll System. Review to ensure Pay Components are correct flagged to include or exclude from the...
- Enterprise Agreement - Pay Rate Increases**: Enterprise Agreement, Severe Risk. Next review: Jun 23, 2024. Description: Where Fairwork have approved an increase to the underlying modern awards, increases are required to employees covered by the Em...
- Super Guarantee Change(s)**: Legislation, Severe Risk. Next review: May 24, 2024. Description: Determine if any SGC updates are required. Apply updates to Payroll System SGC % Max Contributions Base Other
- Salary Packaging - FBT Year End**: Legislation, High Risk. Next review: Mar 1, 2025. Description: Salary Packaging Cards reset to 0.00 Balances refunded for Payment via Payroll (taxed).

Tracking activities for audit

CPA's ability to track audit activities comprehensively has greatly improved. Everything in Paytools is recorded in the activity log as well against checks. It is easy to filter the log to show activity for a specific date range, user etc.

Activity 3 Filters

The activity page gives you an audit trail of what work has been performed. Filter by category, date or team member to find specific activity.

Today

- Sam Jones closed issue **Event Acknowledgement Confirmation** at 10:35am
- Sam Jones assigned Daniel Watson to issue **Event Acknowledgement Confirmation** at 10:11am
- Sarah Li raised issue **Event Acknowledgement Confirmation** at 10:11am
- Lucy Stevens completed check **Daily Case Assignment - Morning** at 8:04am
- Lucy Stevens completed checklist **Integration - Workday to Preceda - Manual** at 8:04am
- Sam Knott completed check **Request Return Leave of Absence** at 8:04am

Role and Responsibilities

Once CPA had access to a working risk register and obligation library, they were able to quickly build a RACI matrix. This is great to show who needs to be engaged with and at what level of engagement is required for each risk and obligation.

It has been particularly helpful in ensuring that their team keeps external parties informed, such as the CPO and CFO.

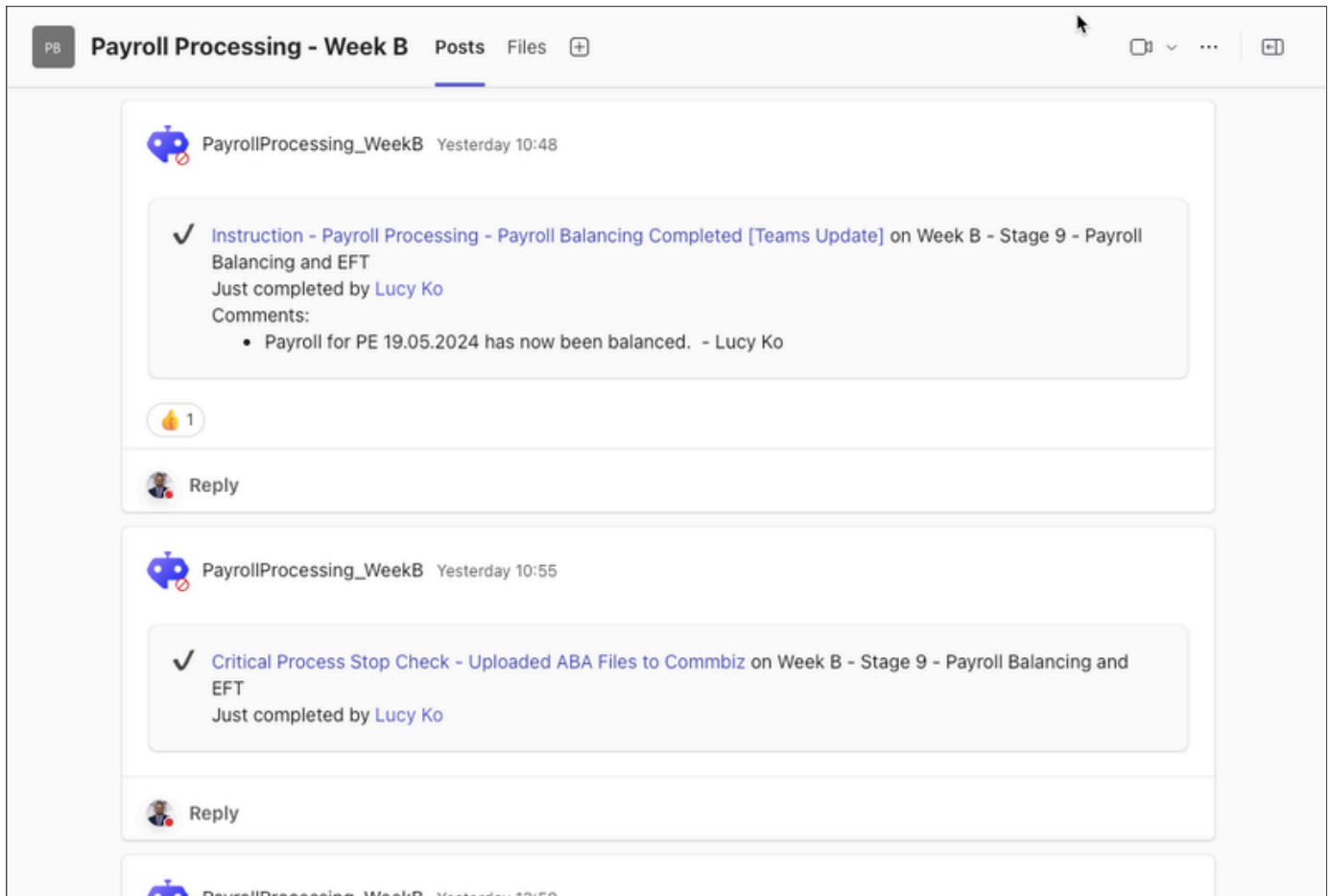
RACI Matrix Export Add item

A RACI matrix is a simple, effective means for defining responsibilities for key payroll obligations, providing a comprehensive chart of who is responsible, accountable, consulted, and informed.

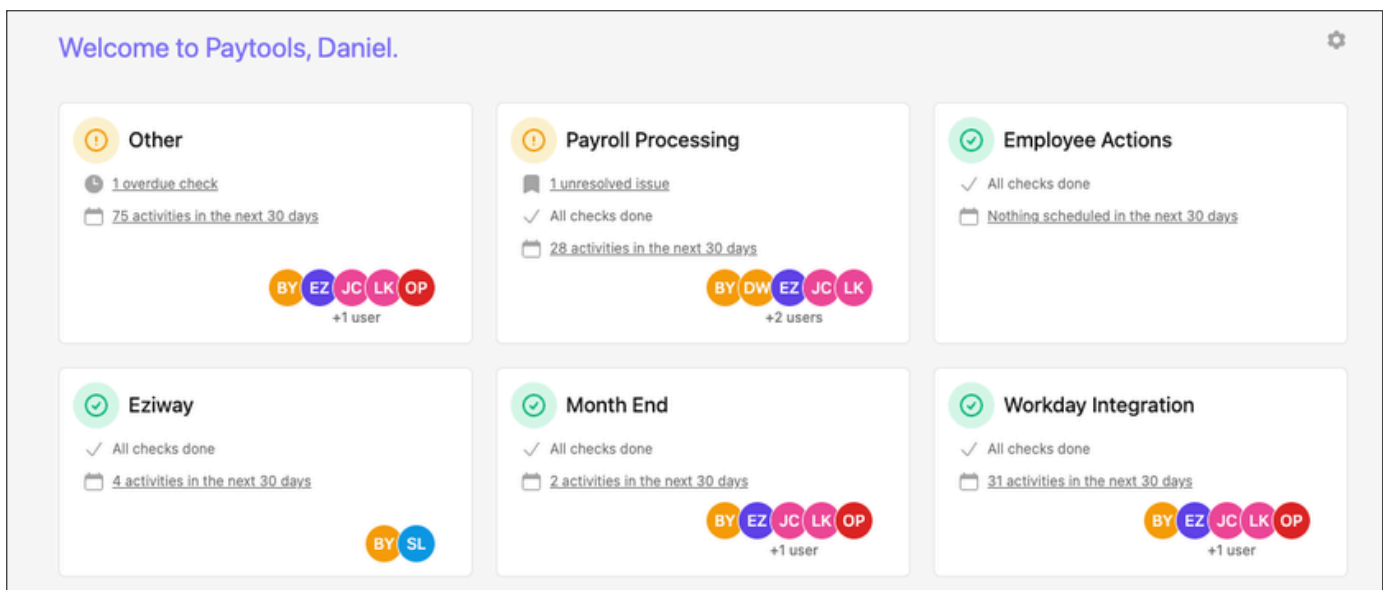
	Responsible The individual(s) with responsibility for performing the item.	Accountable Person who is the "owner" of the work. He or she signs off or approves when the item is complete.	Consulted People who need to give input before the work can be done and signed-off.	Informed People or stakeholders who need updates on progress or decisions, but they do not need to be formally consulted.
Review: Changes to PAYG Rates - Other Processes Event	OP Otto Purcell	DW Daniel Watson		Payroll Support Team: OP Otto P. LK Lucy K. EZ Emma Z. BY Bindi Y. JC Jeong C. SL Sarah L.

Monitoring and reporting

Payroll management has traditionally relied on verbal and online comms to get a sense of whether or not things are running smoothly. But Paytools has introduced an easier way. Since it's easier to use the tools you already have, you can integrate Paytools with Teams to send automatic notifications of what tasks have been completed and by who, as well as anything that might be overdue.



Another easy way to track payroll management via the dashboard. This allows them to check on the status of every event within that category at a glance. The widgets also change colour if something is becoming overdue or is overdue.



Key business outcomes of using Paytools

The adoption of Paytools has led to significant business outcomes for CPA, transforming payroll efficiency.

- **Reduce burnout:** More efficient processes allow the payroll team to finish tasks by 5pm, boosting morale and productivity.
- **Enhanced onboarding:** Training time for new staff has been reduced from six months to run a pay, down to just one month!
- **Smoother system migrations:** With Paytools, CPA is set up for the easiest payroll migration project in history.
- **Embedded governance:** They now have transparency of payroll operations, obligations, issues and risk.
- **More time:** Efficient payroll management has allowed the CPA team to focus on other critical areas. They have reduced their open customer service cases from 600 to 16 in just six months.

How CPA got started with Paytools

The journey with Paytools began with a conversation and product demo. Once Daniel was happy with what he saw, he invited the CFO to review the product and he was able to quickly understand how CPA would use it and how it would benefit the organisation.

They treated Paytools more as a subscription service which allowed them to bypass the usual process when purchasing software. They were able to do this primarily because Paytools doesn't store identifiable data (at most it stores employee ID) and it complied with all of the tech and security requirements. Given this and the fact that the cost was not significant, CPA were able to get it quickly approved.

Implementation kicked-off straight away and we started with payroll processes. We imported all their Word process documentation into Paytools and the CPA team took this as an opportunity to clean up each process as they reviewed it.

For the first three payroll cycles, the CPA team used the paper checklist in conjunction with Paytools to ensure that everything ran smoothly. Any issues found were reported using the Issue Register.

Once they were happy with the payroll processes, they continued to build it out from there.

What's next?

The payroll team at CPA have been incredible to work with. They are continuing to enhance their Paytools environment almost every day! More recently they have added:

- Month end superannuation processes
- Additional approval workflows that are currently managed via email
- Reviewing and updating all risk and response plans to align with corporate governance policies
- More detailed checklists to assist with the review of annual obligations
- And there will be much more to come!

To learn how Paytools could help you transform payroll management within your organisation, book a demo today!

Paytools is Australia's first dedicated **payroll governance & work management platform**

Reduce payroll risk by creating consistent, sustainable and accountable payroll operations.

We can help you build an air tight and fully auditable payroll governance program in days, not weeks.

[Learn more](#)

