



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 the payroll process by an entire day



Significantly improve development and onboarding for payroll team new starters



Embed better transparency and governance practices across payroll

But first, a little context..

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 ten 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. CPA are moving payroll systems to Affinity and using Paytools to assist with the transition.

Payroll challenges CPA were looking to solve

- **No operational calendar:** CPA wanted a shared 'payroll ops' calendar showing detailed breakdown of recurring activities, deadlines and other commitments. This information resided with individual team members.
- **Manual payrun checklists:** Large, spreadsheet based run sheets including a pay run checklist that took 4 days to complete and comprised over 200 individual checks.
- **Payroll processes/work instructions on paper:** All documentation was in Word and stored in one individual's share drive. Processes were hard to find, version control and update.
- **Informal controls and audit:** No formal visibility of when processes were being completed and by whom. Also an inability to track when process changes were made and why. This was compounded when the team went to a hybrid work model.
- **Informal issue management:** Issues were logged in a spreadsheet relating to a broad range of topics: system and integrations, processing problems. Issues were hard to track or view the current status and actions.
- **Risk management:** Managed via an excel spreadsheet and wasn't very effective.

Pay run processing

How payroll was operating before

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.

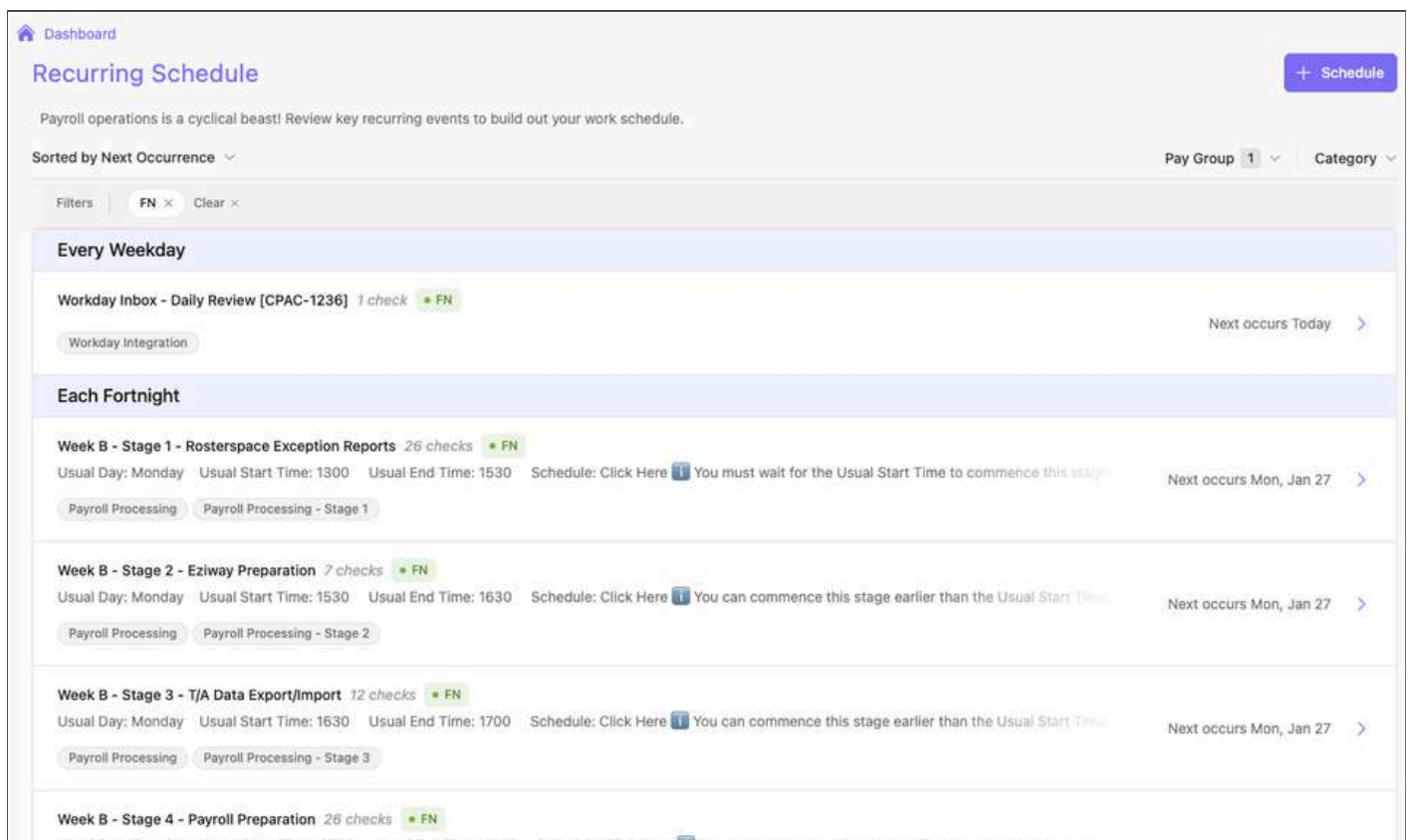


After being introduced to Paytools process management software, Daniel realised he could boost payroll efficiency quickly and without a huge investment - which then drove a business improvement initiative for CPA.

How payroll management looks now

Since starting their journey with Paytools CPA has 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

The screenshot shows a dashboard for the period 20 May - 26 May. It features a navigation bar with 'Recurring Events', 'Today', 'Filters', and '+ Add event'. The main content is a list of tasks categorized by day: Yesterday, Today, and Tomorrow. Each task entry includes a time slot, a title, a status (e.g., 'Completed'), a check count, and a list of assigned users represented by colored initials (BY, EZ, JC, LK, SL). Overdue tasks are highlighted in a pink header.

Day	Time	Task	Status	Checks	Users
Yesterday	All day	Event Acknowledgement	Completed	1	BY, EZ, JC, LK
Yesterday	All day	Upload Preceda Transactions to Ezway	Completed	1	BY, EZ, JC, LK
Today	9:00am	Case Management - Daily Case Assignment (Morning)	Completed	1	BY, EZ, JC, LK
Today	12:00pm	Case Management - Daily Case Assignment (Midday)	1 check	1	BY, EZ, JC, LK
Today	4:00pm	Case Management - Daily Case Assignment (Afternoon)	1 check	1	BY, EZ, JC, LK
Today	All day	Week B - Stage 7 - Ezway Balance Check	Completed	0	BY, EZ, JC, LK
Today	All day	Week B - Stage 6 - Superannuation Calculation/Import	Completed	0	BY, EZ, JC, LK
Today	All day	Week B - Stage 9 - Payroll Balancing and EFT	36 checks	36	BY, EZ, JC, LK
Today	All day	Week B - Stage 10 - Close Payrun and Group Tax	26 checks	26	BY, EZ, JC, LK
Today	All day	Week B - Stage 11 - General Ledger	12 checks	12	BY, EZ, JC, LK
Today	All day	Week B - Stage 12 - Post Close Reporting	25 checks	25	BY, EZ, JC, LK
Today	All day	Week B - Stage 13 - Payslip Distribution	28 checks	28	BY, EZ, JC, LK
Today	All day	Week B - Wednesday - Workday Integration - Core	Completed	0	SL
Tomorrow	9:00am	Case Management - Daily Case Assignment (Morning)	1 check	1	BY, EZ, JC, LK
Tomorrow	12:00pm	Case Management - Daily Case Assignment (Midday)	1 check	1	BY, EZ, JC, LK
Tomorrow	4:00pm	Case Management - Daily Case Assignment (Afternoon)	1 check	1	BY, EZ, JC, LK
Tomorrow	All day	Week B - Centrelink Data Upload	1 check	1	BY
Tomorrow	All day	Week B - Thursday - Workday Integration - Manual	9 checks	9	BY, EZ, JC, LK

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.

The screenshot displays the 'Issue Register' interface in Paytools. At the top, there are navigation options like 'Dashboard', 'Export', '5 Filters', and 'Raise an Issue'. Below this, a list of issues is shown, sorted by newest. The first issue, CPA-1090, is highlighted with a red box and an arrow pointing to its detailed view below.

Issue Register List:

Issue ID	Title	Priority	Status
CPA-1090	Run/Execute - Superannuation Setup Error Report (CPA_PAB_009_A)	Low priority	Closed on Apr 23, 2024
CPA-1083	Check - Superannuation Setup Error Report (CPA_PAB_009_A)	Low priority	Closed on Apr 16, 2024
CPA-1082	Run/Execute - Reverse Post Payrun [Restricted Check]	Low priority	Closed on Apr 9, 2024

Issue Detail View: Run/Execute - Superannuation Setup Error Report (CPA_PAB_009_A)

CPA-1090 opened by Sarah Li

Status: Closed | Priority: 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 Number	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	59		CHOICE Sal Sac \$	E	U	
3												
4												

Vilance > Pay & Benefits - Payroll Processing > FN > 2024 > FN22_PE21.04.2024 > Rosterspace

Name	Status	Date modified	Type	Size
Exceptions by Company		22/04/2024 2:48 PM	File folder	
Hunter Timesheets		19/04/2024 4:25 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

Issue Register in Paytools

Team Learning

The CPA team now also utilise 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](#).

The screenshot displays the 'Learning and Development' module in Paytools. At the top, there are tabs for 'Team Tracking', 'Course Library', and '+ Add Attendance'. Below this, a grid of team members is shown, each with a colored circle containing their initials and their name and role. The members are: Daniel Watson (Senior Manager), Fred Jones (Pay and Benefits Manager), Lucy Stevens (Pay and Benefits Adminis...), Brad Verne (Pay and Benefits Adminis...), Jane Grey (Pay and Benefits Adminis...), Sam Knott (Pay and Benefits Adminis...), and Prajna Singh (Pay and Benefits Adminis...). Lucy Stevens' card indicates she has attended 1 learning event, with the last event being about 1 month ago. A black arrow points from her card to a pop-up window that shows her profile and a list of attended events, including 'Terminations Masterclass' on Wednesday, May 15.

Learning and Development Module in Paytools

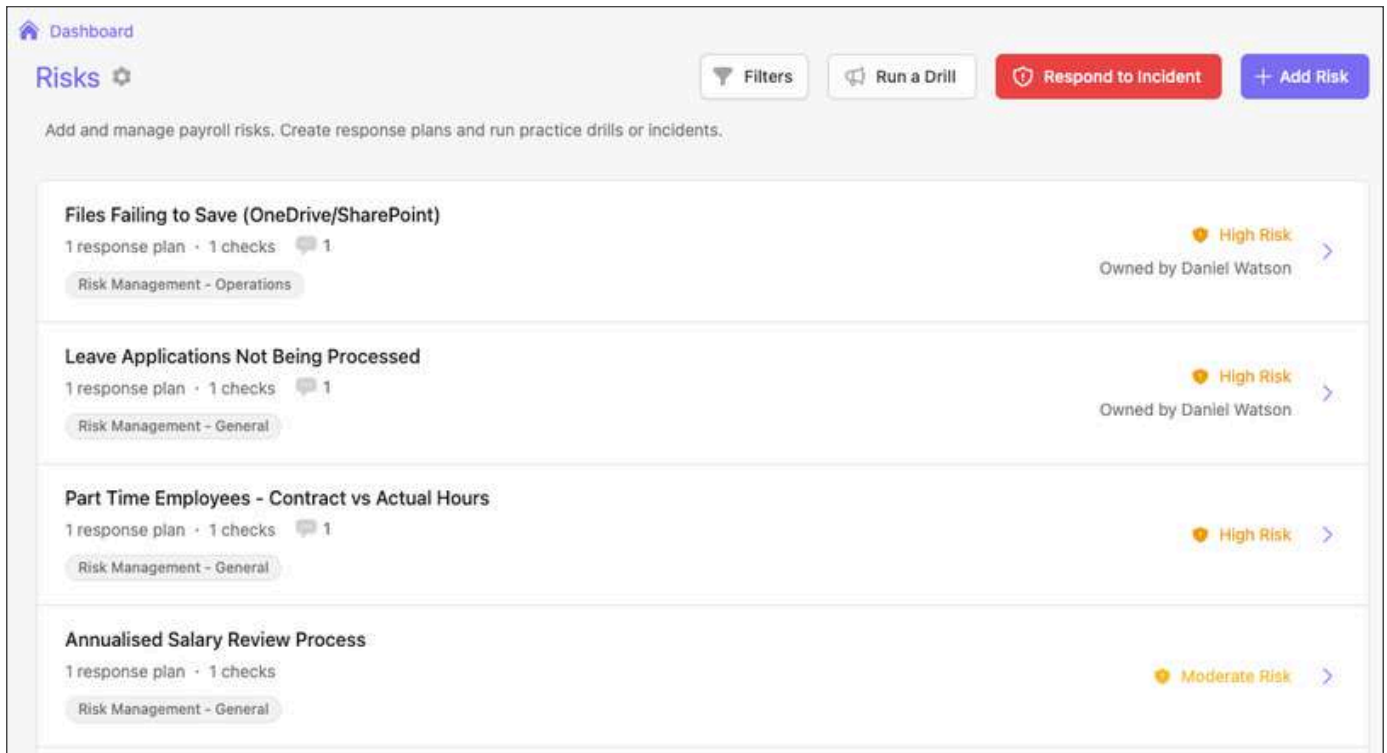
“A huge benefit of Paytools has been the improvement in team development and onboarding for new starters. What once took 6 months to perfect, can now be done confidently in just 4 weeks!”

— 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 displays the 'Risks' dashboard in Paytools. At the top, there are navigation options: 'Dashboard', 'Risks', 'Filters', 'Run a Drill', 'Respond to Incident', and '+ Add Risk'. Below the navigation, a subtitle reads: 'Add and manage payroll risks. Create response plans and run practice drills or incidents.'

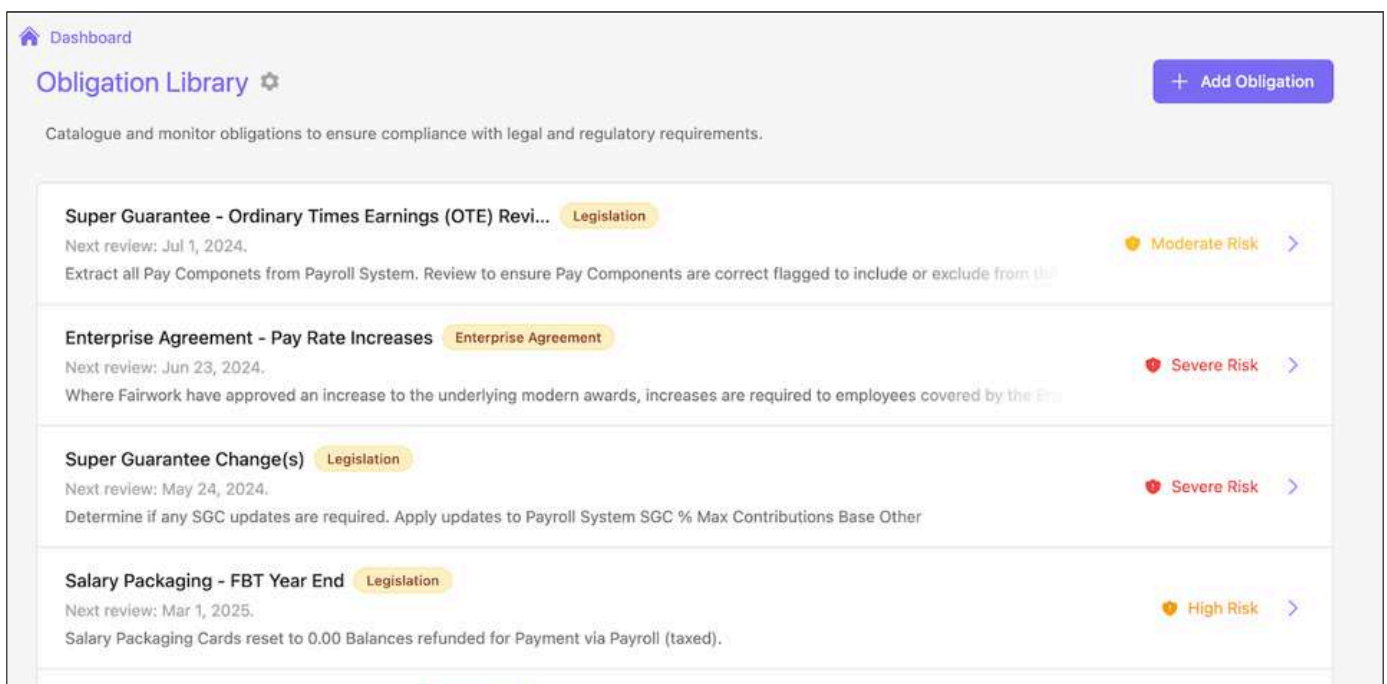
The main content area lists four risks:

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

Risk Management Module in Paytools

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 displays the 'Obligation Library' dashboard in Paytools. At the top, there are navigation options: 'Dashboard', 'Obligation Library', and '+ Add Obligation'. Below the navigation, a subtitle reads: 'Catalogue and monitor obligations to ensure compliance with legal and regulatory requirements.'

The main content area lists four obligations:

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

Obligation Library in Paytools

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.

The screenshot shows the 'Activity' page in Paytools. At the top right, there is a filter icon and '3 Filters'. Below the header, a descriptive text states: '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.' The main content area is titled 'Today' and lists several activities:

- 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

Audit Trail in Paytools

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.

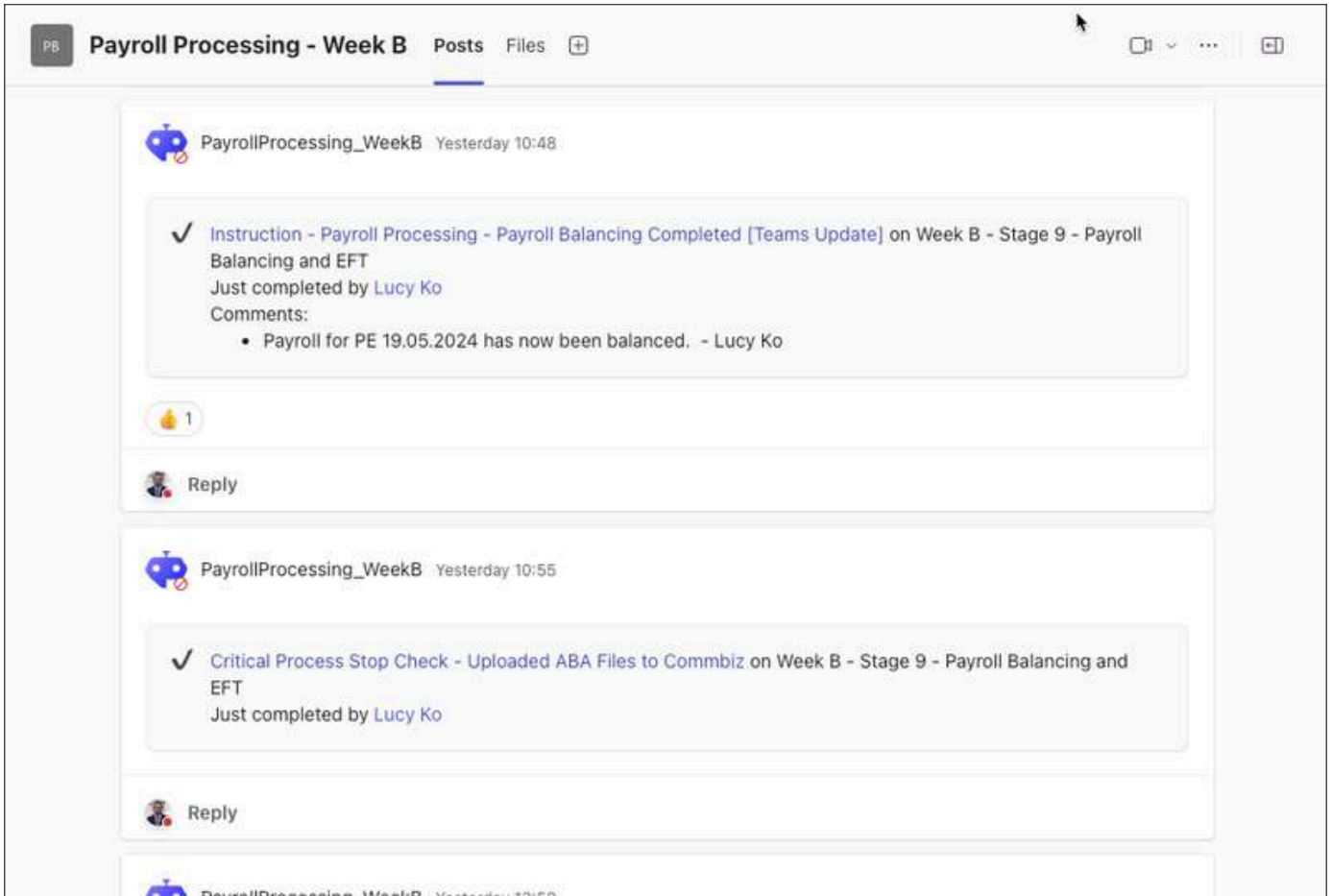
The screenshot shows the 'RACI Matrix' page in Paytools. At the top right, there are 'Export' and 'Add Item' buttons. Below the header, a descriptive text states: 'A RACI matrix is a simple, effective means for defining responsibilities for key payroll obligations, providing a comprehensive chart of who is responsible, accountable, consulted, and informed.' The main content area is a table with the following structure:

	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.
Review: Changes to PAYG Rates	OP Otto Purcell	DW Daniel Watson		

RACI Matrix Model in Paytools

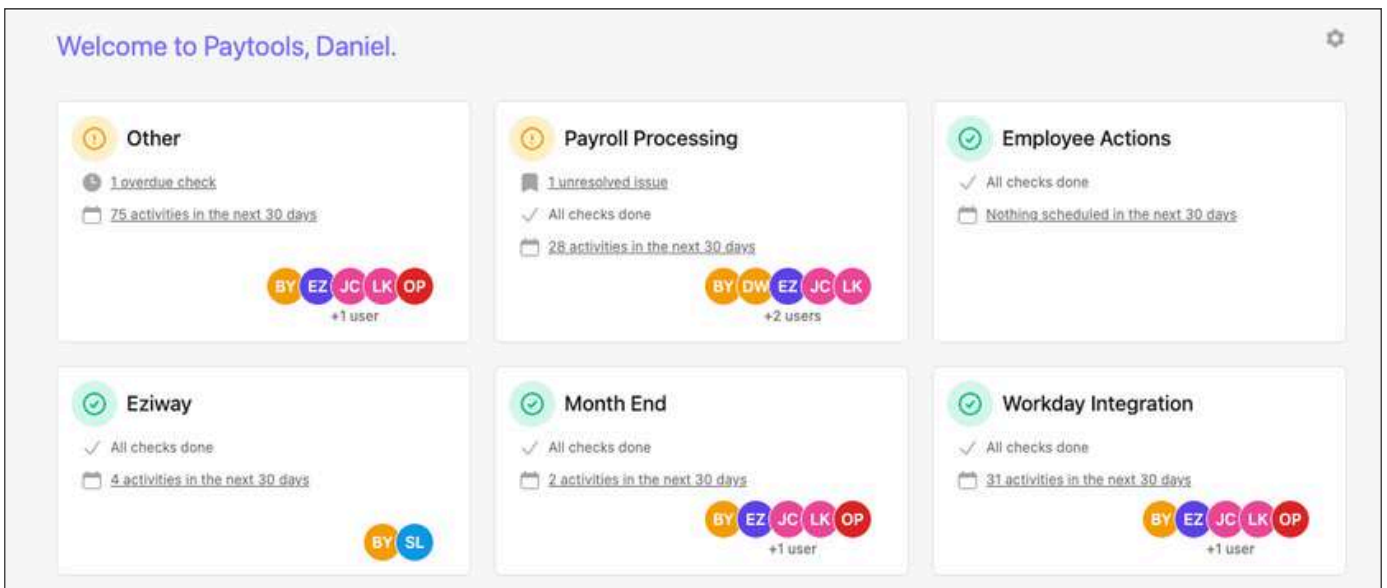
Monitoring and reporting

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.



Automatic notifications sent via Paytools in MS Teams

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.



Dashboard View in Paytools

Key business outcomes of using Paytools

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

- **Operational efficiencies:** Clear, concise and followed processes has allowed the CPA team to reduce payrun processing times by 30%.
- **Embedded governance:** CPA executive have confidence in the payroll function with full transparency of payroll operations, obligations, issues and risks.
- **Reduced burnout:** More efficient processes allow the payroll team to finish tasks by 5 pm, boosting morale and productivity.
- **Team up-skilling:** Training time for new staff has been reduced from six months to run a pay run, down to just one month!
- **Smoother system migrations:** With Paytools, CPA is set up for the easiest payroll migration project in history.

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 does not store identifiable data (at most it stores employee name and 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 process management software

Paytools is built for modern payroll teams to plan, manage and optimise payroll operations. Centralise everything into one secure platform to reduce risk, improve governance and enhance efficiency.

[Learn more](#)

