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CHECKLIST

Payroll Change and Approval Checklist

A practical checklist to help employers supply authorised payroll changes cleanly and on time before each pay run.

BEFORE YOU START

This checklist covers the process for supplying and approving payroll changes. It does not interpret awards, rates or entitlements, and it does not replace workplace relations, tax or legal advice.

1. Who can supply payroll changes

- [ ] Name the people authorised to supply payroll changes.
- [ ] Name who approves the final pay run.
- [ ] Agree how changes are sent, so instructions do not arrive through several channels at once.

2. What needs to be provided before the cut-off

- [ ] Timesheets or hours, where they apply.
- [ ] Approved leave and absences.
- [ ] New starters, terminations and any authorised changes to pay information.
- [ ] Anything unusual for this pay period, with a short explanation.

3. New starters

- [ ] Supply the employee details and start date through the agreed process.
- [ ] Supply the authorised pay information and employment arrangement as the business has determined it.
- [ ] Supply the employee's completed forms and super choice details before the first pay run.

WHAT TO CHECK

The employer decides the employment arrangement and the pay information. A payroll processor works from what the business authorises.

4. Leave and absences

- [ ] Confirm leave has been approved before it is submitted for processing.

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- [ ] Confirm the leave type and the dates.
- [ ] Flag unpaid or unusual absences so they are not assumed.

5. Changes to authorised pay information

- [ ] Send changes in writing, with the effective date.
- [ ] Confirm who authorised the change.
- [ ] Note whether the change affects a period already processed.

6. Terminations

- [ ] Advise the final day and the authorised termination instructions.
- [ ] Confirm what the business has determined is payable, and who confirmed it.
- [ ] Allow time before the cut-off, because final pays rarely suit a last-minute run.

7. Final payroll approval

- [ ] Review the draft pay run against what was submitted.
- [ ] Check anything that looks unexpected before approving, not after.
- [ ] Record the approval so it is clear who signed off.

8. Late or incomplete information

Late information is the most common cause of payroll rework. Agreeing what happens in advance keeps it calm.

- Decide whether late items wait for the next pay run or trigger an out-of-cycle adjustment.
- Decide who makes that call.
- Keep a note of what was held over and why.

9. After the pay run

- [ ] Keep the approval and the instructions with the payroll records.
- [ ] Note any items carried into the next period.
- [ ] Raise unexplained differences promptly rather than at the end of the quarter.

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10. Questions worth clarifying with your payroll provider

- When is the cut-off, and how firm is it?
- What format do you want changes in?
- Who do I contact when something is urgent?
- What will you check, and what remains ours to confirm?

WATCH FOR

Employment decisions, award interpretation and workplace relations advice need the appropriate adviser, and tax matters outside BAS-agent scope go to a registered tax agent.

WHAT NEXT?

If payroll changes are arriving late or unclear, a steadier process usually helps more than a new system. If you would like help working through this, we can talk through where your numbers are now and what would help most. Book a free introductory call at www.loveyournumbers.com.au/contact.

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