



# altus

Altus Payroll Proposal

Shire of Merredin

## Document Control

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Author: Jo Arpin  
Company: IT Vision Australia Pty Ltd  
Address: Level 3, 15 Ogilvie Road, Applecross WA 6153  
Telephone: 08 9315 7000  
E-mail: jo.arpin@itvision.com.au

For more information regarding IT Vision please visit our website at [www.itvision.com.au](http://www.itvision.com.au)

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# Altus Payroll Proposal

## 1. Introduction

### 1.1. Purpose

To provide a proposal for the provision and implementation of a modern and capable payroll solution that integrates seamlessly with SynergySoft and Altus Financials.

### 1.2. Background

We understand that the Shire has a small staffing base but is currently managing it's payroll through a paper oriented manner and use a number of spreadsheets to review and verify their fortnightly pays.

## 2. Our Proposal

### 2.1. IT Vision Solution

Our proposal is to provision Altus Payroll and associated implementation services to enable the Council to realise the benefits of this solution.

#### 2.1.1. Altus Payroll

Altus Payroll (powered by Definitiv) has the following capabilities:

- **Payroll** - Back date and future date transactions by making the most of Altus Payroll's date-driven technology. Altus Payroll makes your operations seamless, proven to increase processing efficiency by up to 250%.
- **Employee Portal** - Nurture engagement and create a better connection with your people using Altus Payroll's user-friendly portal. Creating transparency, Altus Payroll provides a stress-free experience for your staff.
- **Time and Attendance** - Altus Payroll's dynamic Timesheets and Leave Applications enable you to accurately capture job costing, so you have a greater understanding of your true project costs. By having the information to benchmark true hours worked against the payroll costs, you can allocate your resources more productively.
- **Award Engine** - Altus Payroll's Award Engine automates the calculations of awards and enterprise agreements, so you do not need to touch a single spreadsheet. Removing human error, Altus Payroll's robust Award Engine reduces the most time-consuming aspect of payroll to only a few minutes.
- **Reporting** - Make strategic decisions to improve organisational culture, performance, and productivity with real-time workforce insights available to you on demand.
- **Mobile App** - When your staff step out of the workplace, the Altus Payroll mobile app (iOS and Android) is there with them. Whether they are at the office, in the field or at home, Altus Payroll makes managing work-life commitments easier.
- **Rostering** - Take control of your resource planning using Altus Payroll's intelligent rostering tools. Altus Payroll equips you with information you need to create cost effective rosters with the right skills and people.
- **Timeclock** - Altus Payroll's Timeclock app, makes clocking on and off simple, while ensuring you can track and manage your people right down to the task at hand. Using secure NFC technology, employees just tap 'n' go.

## 2.2. Implementation Services

We understand the critical nature of payroll and the need to get it right. Our implementation approach reflects learnings from over 30 years' experience in software implementation and consulting.

IT Vision has adopted a project methodology which is split into 4 delivery Phases:

Phase	Description	Outcomes
1	Initiation and Planning	This is the preparation and planning phase of the project where project tasks and scheduled go live dates are agreed. A regular project meeting cadence will be established, and you will be introduced to your IT Vision Project team. Discovery documentation will be supplied by your Implementation Specialist and detail will be provided to ensure clarity and agreement around your resource commitment. Completion of all <a href="#">Project Deliverables</a> enables transition to Phase 2.
2	Pre-Implementation	The pre-implementation phase is a critical phase where the application software will be provisioned, the build will be finalised and parallel pay-run activities completed with adjustments following each test cycle to ensure all remediation activities are complete. Completion of <a href="#">Project Deliverables</a> for this Phase will enable transition to Phase 3.
3	Go Live	The cutover from your legacy payroll system to Altus Payroll will be fully supported with training and implementation support from your Implementation Specialist and the extended IT Vision Project Team. <a href="#">Project Deliverables</a> for this Phase will be completed to enable transition to Phase 4.
4	Post Go Live Support	Your IT Vision Project Team will continue to provide support following your go live event during the Warranty period. Any issues identified in the Go Live Report or during production use of the product will be remediated to your satisfaction. Completion of all <a href="#">Project Deliverables</a> enables transition to business as usual

Please refer to [Appendix A](#) for a detailed task breakdown of anticipated implementation tasks.

### 2.2.1. In Scope

IT Vision will deliver implementation, training, and project management services, with an IT Vision Project Manager charged with overseeing delivery, this includes:

- Access to an Altus Payroll tenant for your organisation
- Project Management Services
- Implementation Services and Training
- Data Migration Services
- Go live and post implementation assistance
- Employee focused User Manuals
- Manager focused User Manuals

Data migration includes the following data structures:

- Employee Details
- Banking and Tax Details including Variations
- Pay Calendars
- Positions
- Superannuation including YTD balances (upon confirmation)
- Additions and Deductions
- Leave Balances
- Leave Policies
- Pay Policies

- Locations
- Departments and Projects
- Roles
- Work Schedules (only if suitable and Online Timesheet/Leave has been deployed)

### 2.2.2. Out of Scope

The following services are out of scope:

- Payroll transaction history conversion
- YTD PAYG / STP balance conversion
- Any items not defined in this document

## 3. Project Deliverables

To offer assurance for both the Customer and IT Vision, deliverables will be adopted as a measure of project performance. This will offer a mechanism to report project status, ensure timely identification of project risks and issues, alongside the application of practical mitigation activities. Delivery will be aligned to project initiation dates following acceptance of this Proposal.

Phase	Description	Performance Artefacts
1	Initiation and Planning	Project Initiation Documentation (PID): <ul style="list-style-type: none"> <li>• Project Brief supplied by IT Vision</li> <li>• Project Plan provided by IT Vision</li> <li>• Software licences deployed</li> </ul>
2	Pre-Implementation	<ul style="list-style-type: none"> <li>• Core payroll build</li> <li>• Configuration training services</li> <li>• Pre-Go Live Configuration Checklist</li> <li>• Software provisioned with base configuration / logins</li> <li>• Configuration training services</li> <li>• Data migration (per scope) deployed to test / prod environments</li> <li>• Pre-go live configuration checklist</li> </ul>
3	Go Live	<ul style="list-style-type: none"> <li>• Implementation and go live services</li> <li>• Go Live Report</li> </ul>
4	Post Go Live Support	<ul style="list-style-type: none"> <li>• Post Implementation Plan</li> <li>• Project Completion Certificate</li> </ul>

## 4. Responsibilities

IT Vision will provide a Project Manager who will be responsible for the overall success of the project and for IT Vision's responsibilities, the customer must nominate a Project Manager who will be the primary interface for their organisation.

Regular meetings will be held during the project and for the warranty period after go-live, to monitor project outcomes.

IT Vision is to:

- Clearly communicate the required meeting/training/workshop times
- Provide adequately skilled consultants and to undertake the engagement

The customer is to:

- Make available suitable staff who have a high level of understanding of current processes and outputs
- Make available suitable staff to assist as necessary with configuration, data migration and testing activities
- Make available suitable staff for project events at agreed times
- Organise attendees, book suitable venues and provide access to technical support for any agreed onsite events

- Provide access and support to IT Vision staff during the implementation phase and on an ongoing basis thereafter to facilitate support services.
- Ensure all project staff have access to MS Teams (including audio and video) during the project to allow effective collaboration and sharing of project artefacts.

## 5. Commercials

### 5.1. Pricing Information – single deployment

Item	Cost	Frequency
Altus Payroll Annual Subscription – Based on 55 staff	\$ 10,560	Annual
Altus / SynergySoft Integration	\$2,000	Annual
STP submission (\$0.05 per employee/submission)	\$71.50	Annual
Implementation Services	\$46,500	Once Off
<ul style="list-style-type: none"> <li>• Award configuration</li> <li>• Data Conversion Services</li> <li>• 2 Parallel pay runs</li> </ul>		
Travel Time (assuming three visits @98/hour)	\$1,176	Once off
<b>Total</b>	<b>\$ 60,307.50</b>	

Note that volunteers (non-paid staff) are not charged.

### 5.2. Optional Features

Item	Subscription Cost	Frequency	Implementation Effort
Software Licence – Onboarding (\$1/staff member/month)	\$ 360	Annual	\$723
Software Licence – Compliance (\$2/staff member/month)	\$ 720	Annual	\$3,620
Software Licence – Work Restrictions (\$2/staff member/month)	\$ 720	Annual	\$1,810
Single Sign on	\$900	Once Off	\$1,810
Play account (note includes one free fresh per month)	\$200	Monthly	-

### 5.3. Terms and Conditions

- This quotation is valid for a period of 60 days.
- All dollar values are in Australian dollars (\$AUD).
- All prices are presented exclusive of GST.
- Any necessary Travel and Subsistence expenses will be charged at cost, and may include:
  - Travel – flights, taxis / hire cars or mileage allowance at the current ATO rate, tolls, petrol.
  - Accommodation.
  - Meal allowances - at the current ATO reasonable travel allowance rate.
  - Any other expenses directly associated with travel to your site.
- Initial Licensing of all software products occurs on the first business day after the receipt of Order and is subject to an Initial License Fee.
- Annual Licensing occurs upon the anniversary date of the go-live date of the solution.
- Annual License Fees are subject to increase on an annual basis based on the annual change in Consumer Price Index (CPI) + 1%.
- Payment terms are as follows:
  - 100% of Software Initial License fee invoiced upon receipt of purchase order.
  - 20% of Professional Services value invoiced upon receipt of purchase order (non-refundable).
  - Balance of Professional Services fee invoiced in equal monthly amounts over the project duration.
  - Travel time along with travel and subsistence costs to be charged in arrears as incurred.
- IT Vision reserves the right to issue variation requests where clear deviations from the services scope of work and / or agreed timelines are identified.

- As part of the implementation process, a tenant will be spun up to build your award and help align key staff for the go live process. The tenant will be provided at no cost for up to 3 months, unless otherwise agreed. Additional delays in go-live can incur a tenant maintenance fee of \$200/month.
- During the implementation process this tenant will not be charged to
- All other terms and conditions are as per the existing applicable panel contract or master agreement. If no pre-existing agreement is in place, then the IT Vision License Agreement located on the IT Vision Client Portal applies. <https://client-portal.itvision.com.au/documents/it-vision-master-services-agreement>
- Cancellation Fees:
  - a. Any customer cancellation of scheduled professional services without sufficient notice and/or change control agreement will incur the following cancellation fees:
  - b. Cancellation more than 3 days before the event: 25% of the quoted fees
  - c. Cancellation less than 3 days before the event: 50% of the quoted fees
- All software licenses are subject to a minimum term of 2 years from the date of Initial License. If a software license is no longer required and a request is made to cancel the license the balance of the remaining term is not subject to refund and remains payable.
- Any notice to terminate a software license is required to be made in writing providing 6 months notice prior to the requested termination date.
- If for any reason a software product is deemed refundable outside of the 30 day warranty period (i.e. 30 days from the date of Initial License), any agreed refund will be offset against the subsequent years Annual License Fees.

#### Accommodation and Meals

IT Vision will charge the customer for Travel, Accommodation and Meal costs associated with work undertaken on customer premises as follows.

- Travel will be charged from Perth.
- Accommodation will be charged at our cost.
- Meals will be charged at the ATO Meal Allowance rate (which is what we pay our staff). This is currently \$107 per full day.

## 6. Execution

Based upon the scope defined above and the associated financial and resourcing commitments, I elect to undertake this engagement.

Approver Name	Title	Signature	Date

## 7. Appendix A – Sample Project Task Breakdown

Phase	Task	Objective
Initiation and Planning (1)	Project Initiation	<ul style="list-style-type: none"> <li>Initiation Meeting including Client Briefing</li> <li>Establish Project Meeting Frequency</li> </ul>
	Phase 1 Deliverables	<ul style="list-style-type: none"> <li>Refer <a href="#">Project Deliverables</a></li> </ul>
Pre-Implementation (2)	Design Scope	<ul style="list-style-type: none"> <li>Assist in the understanding of awards / agreements /conditions</li> <li>Request Confirmation / information for final Core Structure Setup</li> <li>Confirmation of award interpretation</li> </ul>
	Design Build	<ul style="list-style-type: none"> <li>Build core setup</li> <li>Data cleansing / migration</li> <li>Award Policy build</li> <li>Journals created</li> </ul>
	User Acceptance Testing / Review	<ul style="list-style-type: none"> <li>Internal testing and review</li> </ul>
	Parallel Pay-run	<ul style="list-style-type: none"> <li>Gather Parallel Pay-run information</li> <li>Run Parallel Pay-run 1</li> <li>Review parallel pay-run findings with customer</li> <li>Remediate any issues arising out of Parallel Pay-run 1</li> </ul>
	Customer Setup Review	<ul style="list-style-type: none"> <li>Review and handover for customer testing</li> <li>Review / handover meeting</li> </ul>
	Implementation Training	<ul style="list-style-type: none"> <li>Super User / Administrator / Employee</li> </ul>
	Parallel Pay-run (Customer Led)	<ul style="list-style-type: none"> <li>Assistance with Parallel Pay-run 2</li> <li>Authorisation for go live</li> </ul>
	Phase 2 Deliverables	<ul style="list-style-type: none"> <li>Refer <a href="#">Project Deliverables</a></li> </ul>
Go Live (3)	Go Live	<ul style="list-style-type: none"> <li>Onsite assistance through until completion of first Altus Payroll pay period</li> </ul>
	Phase 3 Deliverables	<ul style="list-style-type: none"> <li>Refer <a href="#">Project Deliverables</a></li> </ul>
Post Go Live Support (4)	Warranty and Closure	<ul style="list-style-type: none"> <li>6-week post go live warranty period</li> </ul>
	Phase 4 Deliverables	<ul style="list-style-type: none"> <li>Refer <a href="#">Project Deliverables</a></li> </ul>



# Get in touch

## Perth Office

Level 3, Kirin Centre  
15 Ogilvie Road  
Mount Pleasant, WA 6153  
P: (08) 9315 7000

## Adelaide Office

305/356 Sea View Road  
Henley Beach, SA 5022

## Melbourne Office

1204/8 Kavanagh Street  
Southbank, VIC 3006

## Brisbane Office

200 Kelvin Grove Road  
Kelvin Grove, QLD 4059





me, Hugh Jackman



Shift Duration  
hours, 45 mins




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## Connect with us

 @itvision.australia  
 (08) 9315 7000

 @ITVisionTweets  
 www.itvision.com.au

 IT Vision Australia