

Intro to Bots

Using RPA in Payroll

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Bots In An Hour

- BOT Basics
- RPA in Payroll
- Build-a-Bot
- RPA Challenges
- Technology & Tools
- Wrap Up

How Do BOTS Work?

Input

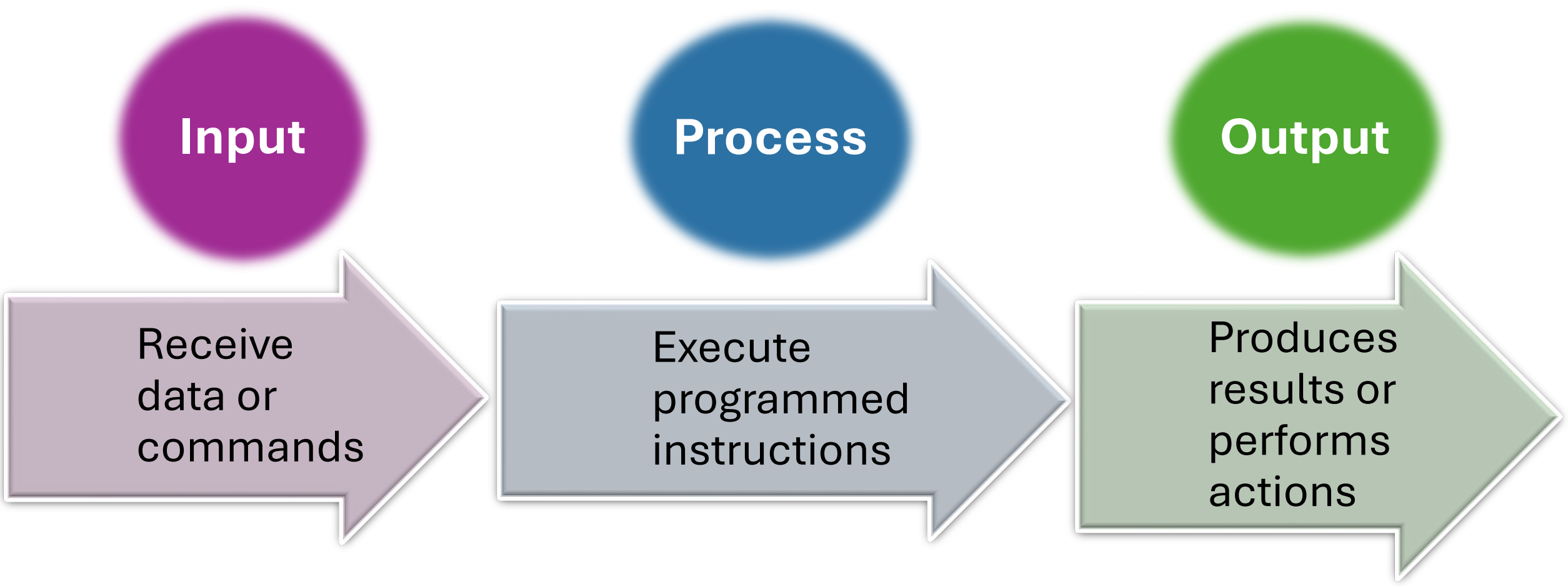
Receive
data or
commands

Process

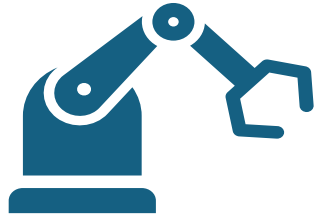
Execute
programmed
instructions

Output

Produces
results or
performs
actions



What is a BOT?



TASK

Automate, specific, individual, repetitive tasks; single application



CHAT

Engage with conversation through text or voice



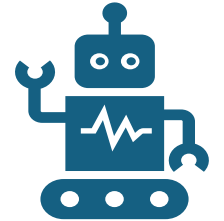
SOCIAL MEDIA

Automates interactions; posts, tweets, etc.



WEB CRAWLERS

Gathers information from the web for search engines



RPA

Automates end-to-end repetitive, rule-based business processes; multi-application

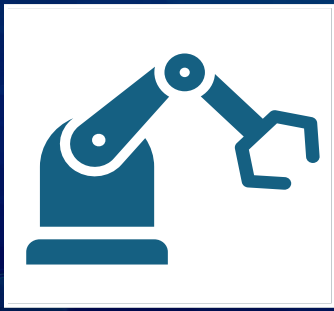
Polling Question #1

Does your Payroll Dept use RPA?

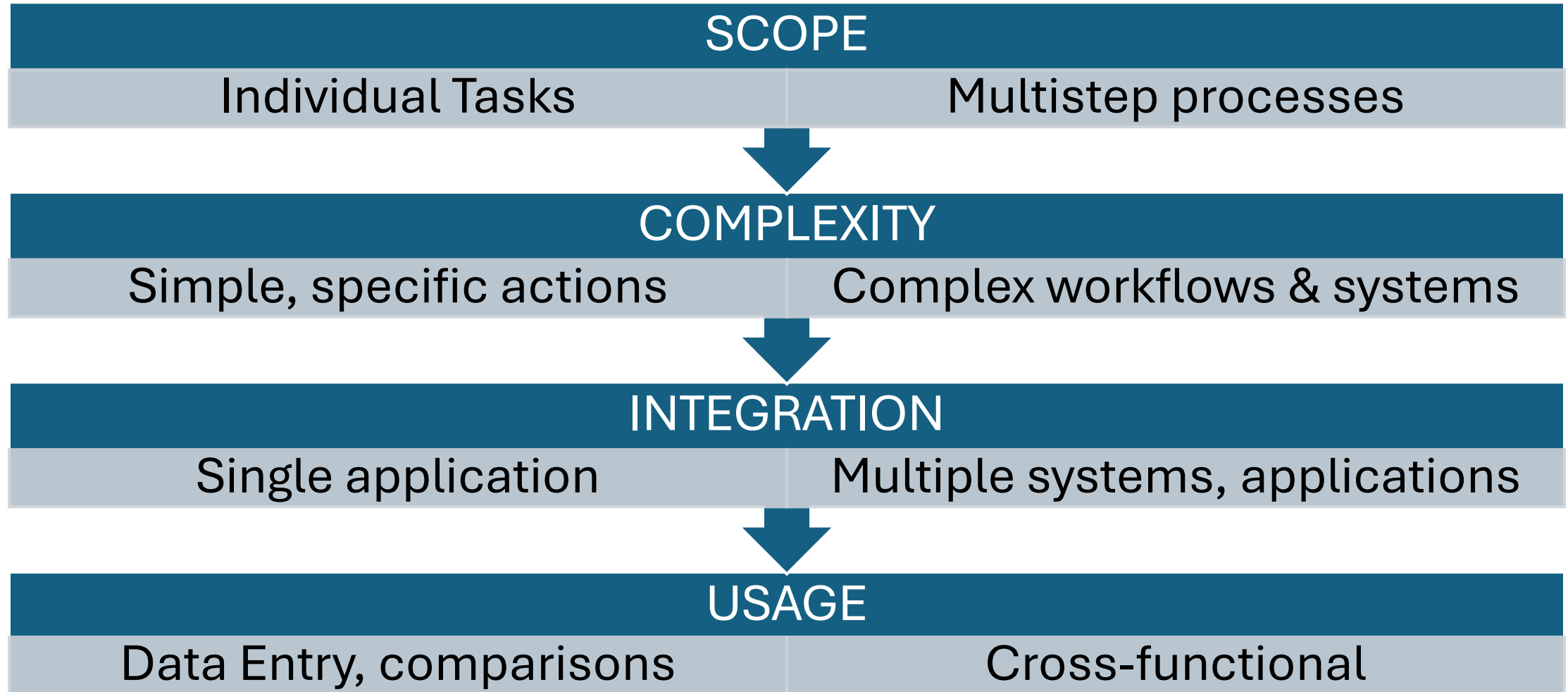
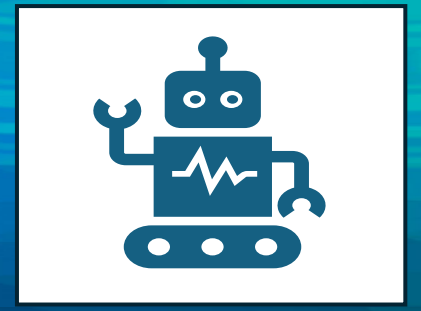
A. Yes

B. No

C. I am not sure

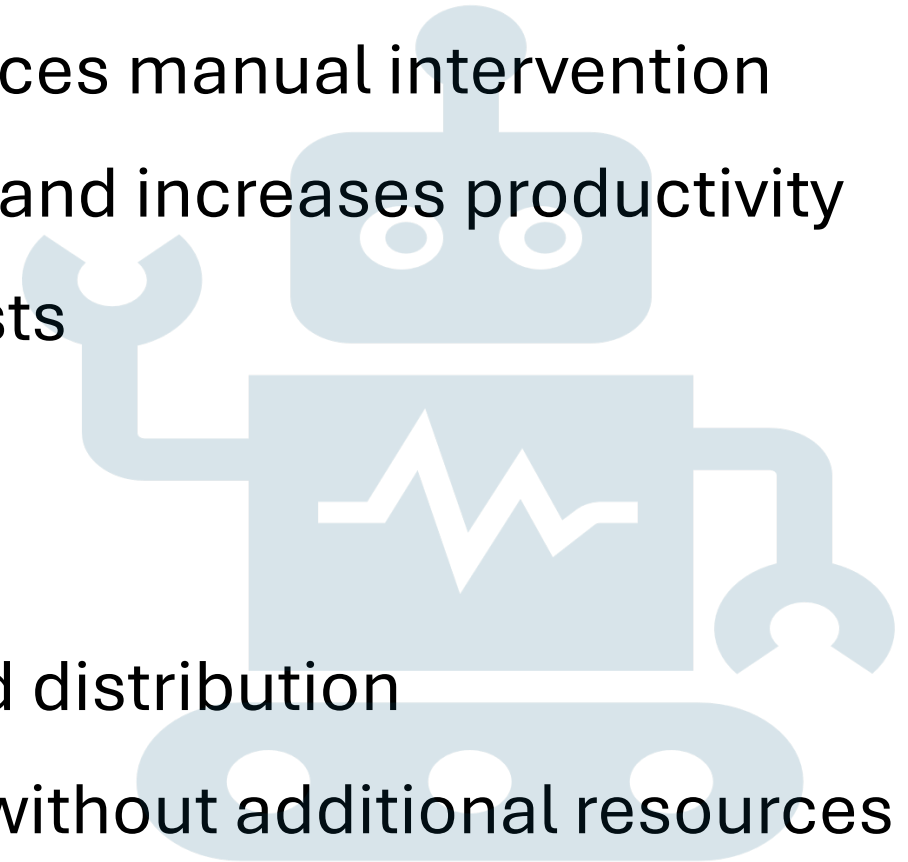


Task BOT vs RPA BOT

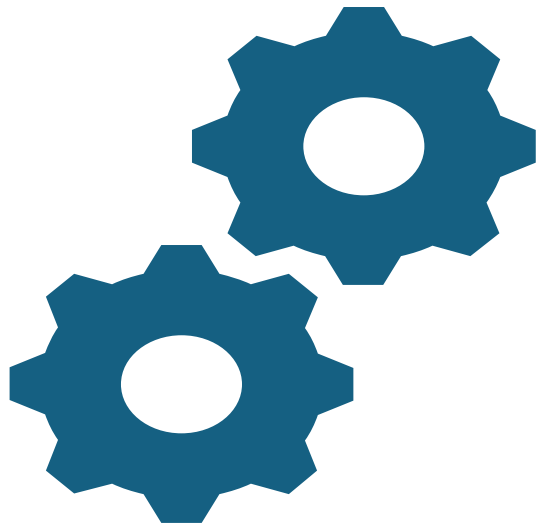


Key Benefits

- **Accuracy and Error Reduction** – reduces manual intervention
- **Time Efficiency** - reduces processing and increases productivity
- **Cost Savings** – lowers operational costs
- **Compliance**
- **Audit Trails** – who, what, when
- **Reporting** – automates generation and distribution
- **Scalability** – high volume processing without additional resources



RPA in Payroll



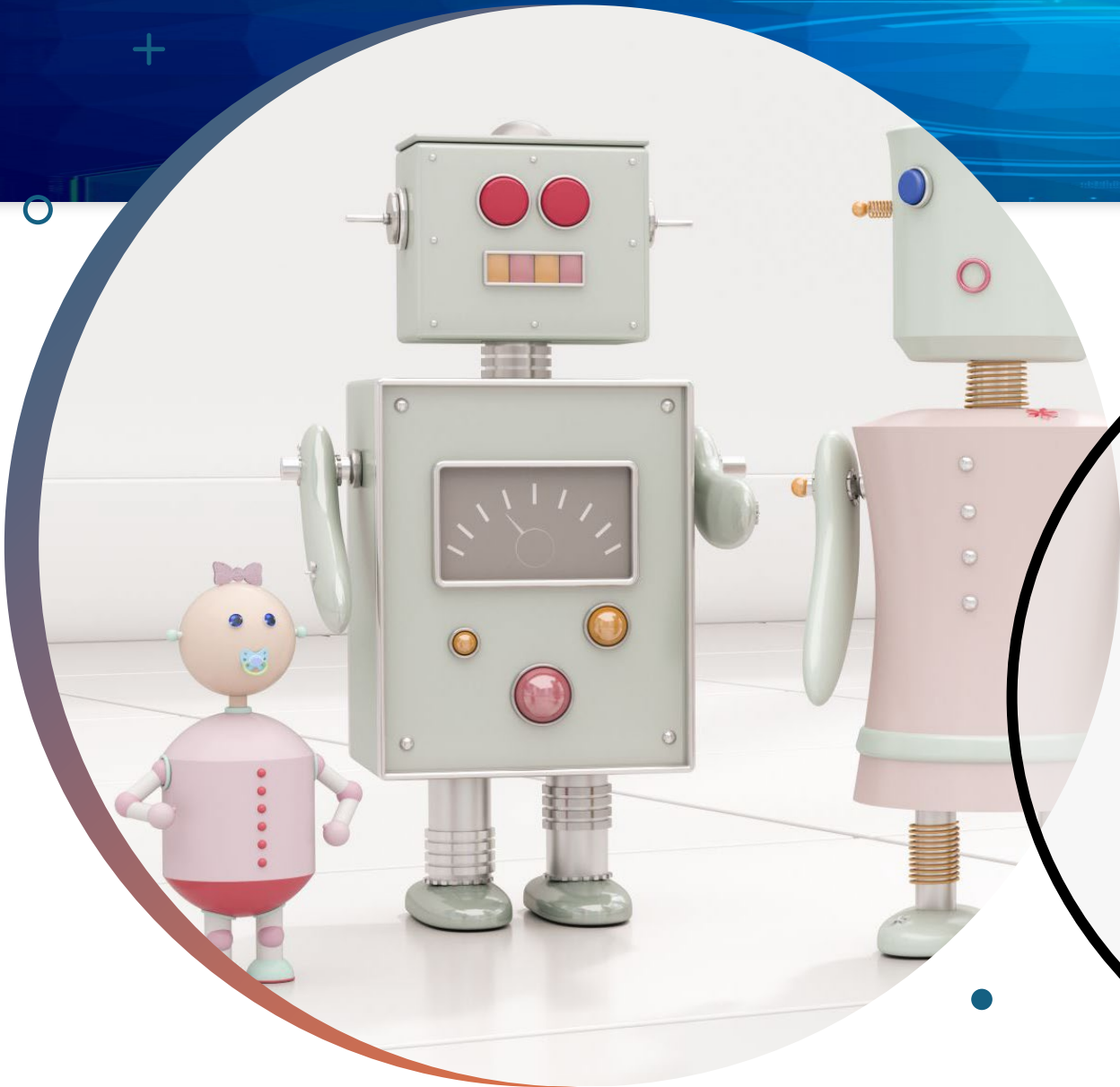
Typical “Repetitive” Processes

- Data Entry and Validation
- Payroll Calculations
- Tax Compliance/Audits
- Reporting and Metrics
- Communications

Payroll Ideas for RPA

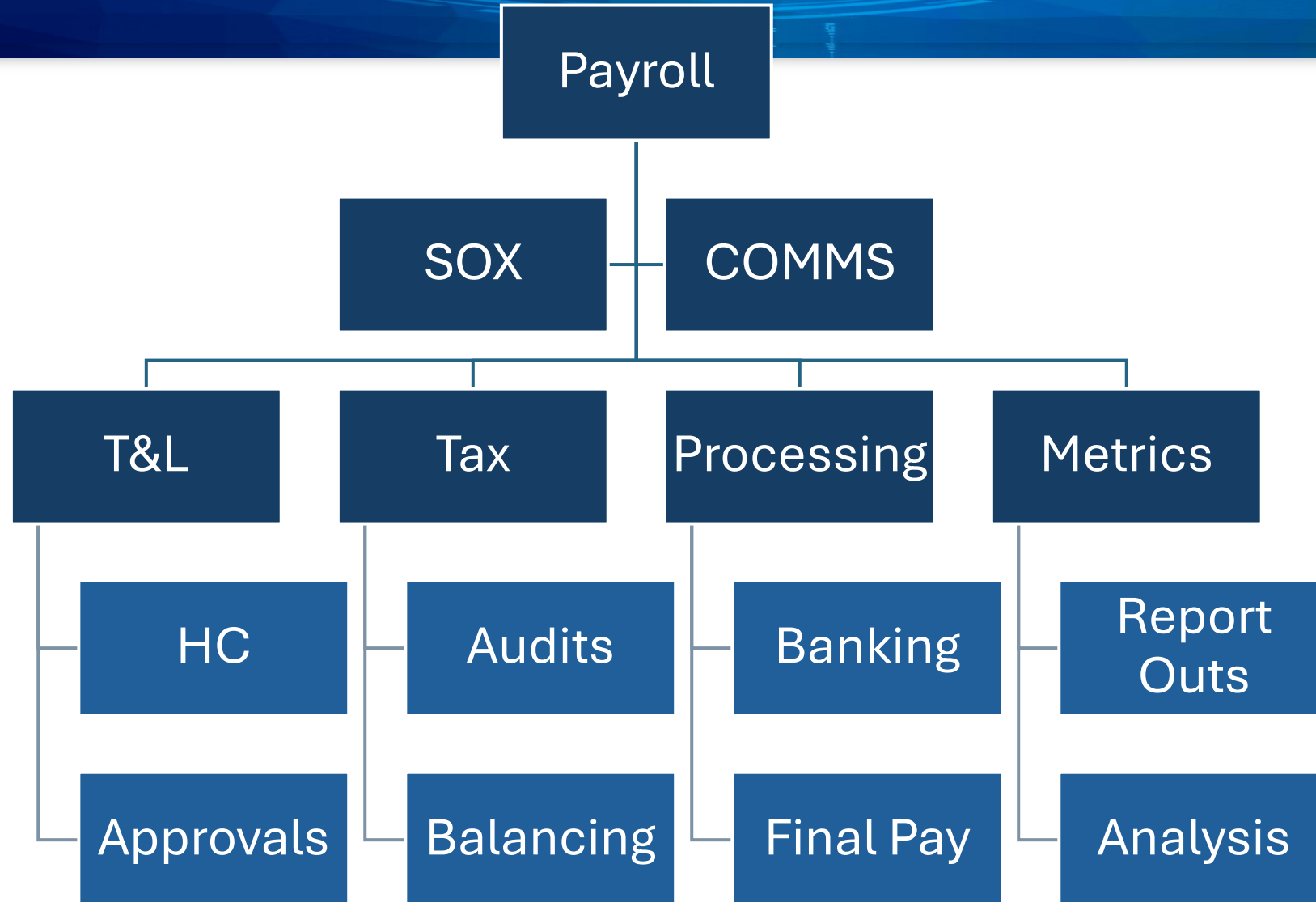
Timecard Corrections	Overpayment Notifications
Verification of Employment Completion	Check / ACH Reversals
Deceased Employee Process	Balance Adjustments
Payroll QA	Benefit Refunds
Bank Returns	FICA Tax, VISA Status Review/Refund
Escheatment Process	System Upgrades and Test Scripts
Call Monitoring Review	Garnishment Termination Notices
Password Resets	Monthly Payroll Metrics
W-2 Reprints / W-2c Creation	Employee Notifications
Final Payments / Quick Payments	Call Center Scheduling
Shipping Labels	Survey Generation

Credit: Dr. Martin Armstrong



**BUILD
-A-
BOT**

Break It Down



Polling Question #2

How do you see your company using RPA in the future?

- A. Payroll Audits/Validation
- B. Payroll Reconciliations
- C. Payroll Processing
- D. A combination of A, B, and/or C.
- E. Good luck getting my company to use RPA

Documentation & Requirements

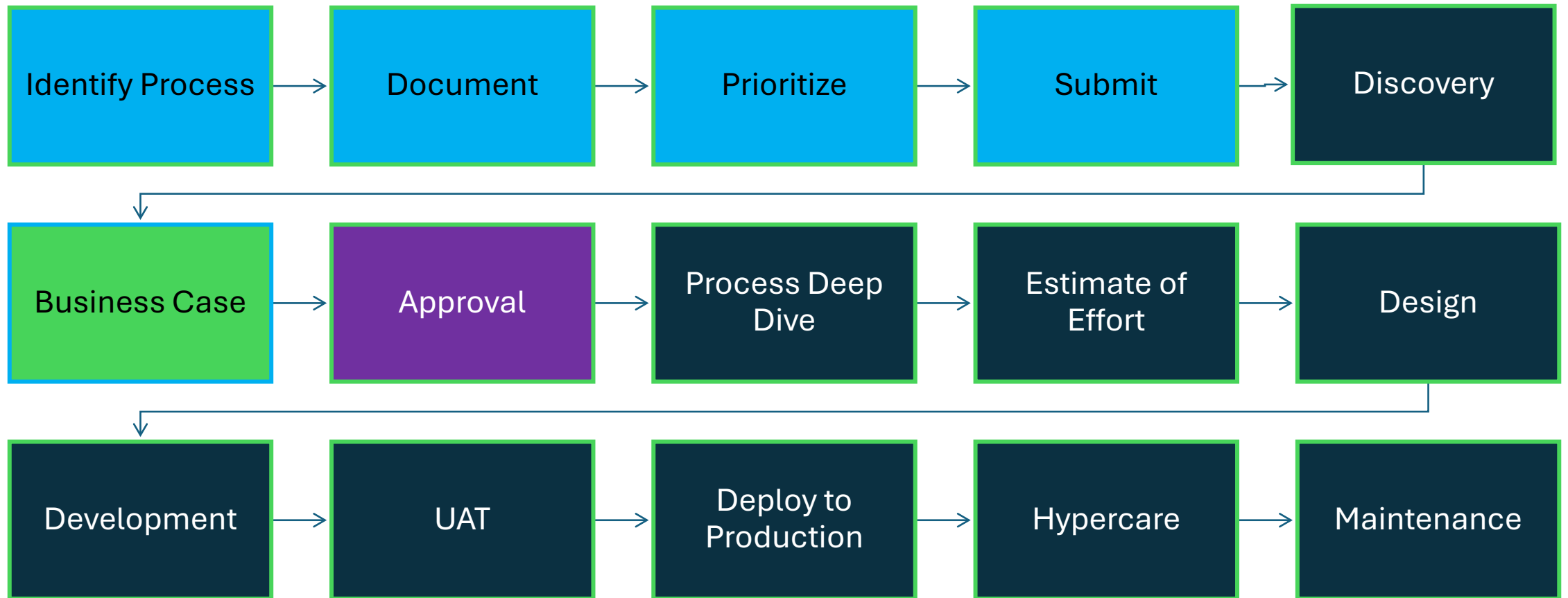
- SOP
 - Purpose
 - Systems
 - Reports
- Workflow
- Time Savings
- Expectation / Output
- Expected Benefits
- Subject Matter Experts



SOP Tracker

RPA #	Name	Frequency	Min Time Spent	Max Time Spent	Max Annualized	Purpose	Description	Expectation
Assign a number for tracking	Enter a name to clearly define what the BOT is for	Weekly Biweekly Qrtly Annually	Minimum hours spent or fraction of	Maximum hours spent or fraction of	(Formula) Calculate max hours in a year	WHY do you do this?	WHAT are you doing?	What do you want to receive and when? And/Or what action is expected.

RPA Lifecycle



RPA Challenges

- 1. Integration Challenges**
- 2. Change Management**
- 3. High Initial Costs**
- 4. Complexity of Setup**
- 5. Security and Compliance**
- 6. Scalability Issues**
- 7. Maintenance and Monitoring**
- 8. Limited Scope**
- 9. Process Fragility**
- 10. Vendor Dependency**

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Polling Question #3

What do you feel is the biggest RPA challenge for your organization?

- A. Change Management
- B. Security and Compliance
- C. Maintenance & Monitoring
- D. Process Fragility

Technology

Software & Development Tools

- Automation Anywhere
- Blue Prism
- UiPath
- GitHub
- Microsoft Power Automate



Tool Selection

Complexity

- Various levels of capabilities?

Integration

- Does it work with your systems?

Scalability

- What are your business needs?

Budget

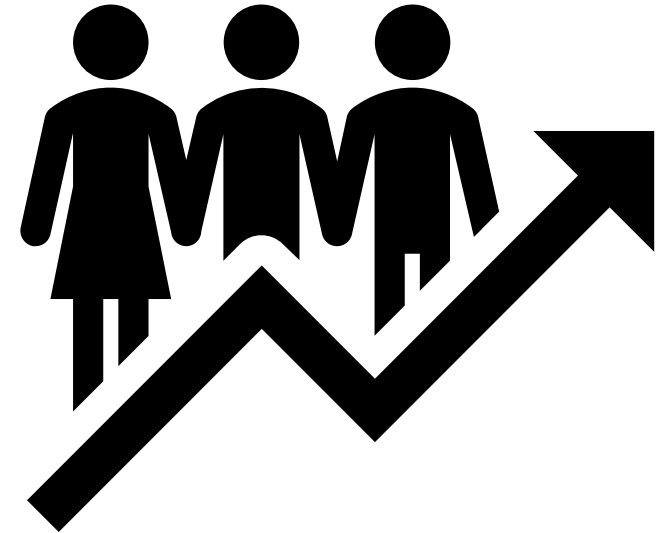
- Licensing, implementation, ongoing maintenance

User Experience

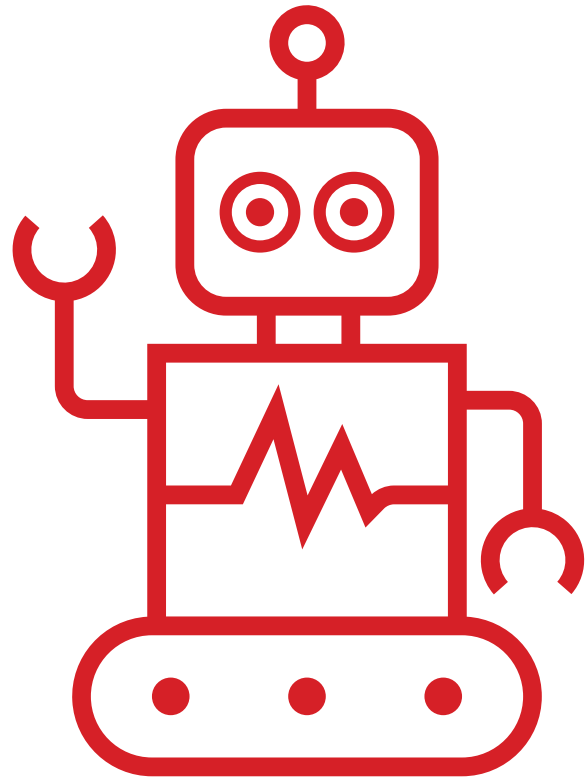
- User friendly interface and customer support

Wrap Up

- Create your payroll roadmap
 - What do you want the future to look like
 - Challenge your teams
- Partner with your IT teams
- Network and leverage PAYO
 - Stay current on advances in RPA technology
 - Integration with AI and Machine Learning
 - Compliance and Regulatory Requirements



Q&A



**Thank you
&
Happy
Holidays!**