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Tackling Common Payroll System Reporting Challenges

When it comes to payroll system reports, HR and payroll professionals face a couple of major challenges. These challenges can stymie even the most seasoned system administrator, making it extremely difficult to extract the correct data from their HR and payroll systems to create accurate and timely reports. If you're struggling to get that report done by end-of-day Friday, the good news is these challenges can be met and resolved.

Recognizing and Accessing the Correct Data Elements

Because data is spread throughout many tables and screens within your HR/Payroll solution, finding the right data elements in the system may be one of the most difficult challenges.

Start by fully understanding the report purpose and intended recipients to lay the foundation for identifying the proper data elements to include. There are some questions you can ask to help determine the report's actual purpose, such as:

- Why is this report being produced?
- Is this report part of a quarterly executive summary?
- Does it fulfill a new regulatory requirement?

Knowing exactly why the report is necessary will help you identify the key data you need to include.

Some organizations continue to house HR-related data in multiple systems. This only adds to the difficulty of creating accurate reports. Each data element should have a designated 'system of record, and that should be the source. Ideally, there is a way to ensure data integrity across these systems. If you are confident that all systems are current and synchronized, then that one system may become the data source for the report.

You will need a solid understanding of how your system works and how data is structured, even if the embedded report writer is converting fields names to "plain English" or has data grouped in topics.

Identifying Accurate and Current Information

Another challenge is in combining current and historical information into a single report. Potentially, some historical data may be archived in another system, but even if it is available in your core HR/Payroll system, using the proper method for pulling both current and (usually selected) history into a single report is complex.

Identifying and aligning the current (or most recent) data associated with other core data can be complicated as well. Dependent and beneficiary data is also frequently stored within the same tables as employee data with a validation field classifying each record. When you need to include this information alongside the employee data, take care to include the appropriate fields to so you can audit your results to ensure accuracy.

What if the data doesn't actually exist but can be calculated or derived from other data? Most report writers have the functionality to create these values by using embedded functions or SQL scripts. These fields can then be used as any other for display, filtering, totaling, etc. However, creating and reporting off of these fields requires a more advanced level of report writing expertise.

Building Organizational Skills to Match Your Reporting Needs

Your team might be struggling with their skill set for writing reports, particularly if the report requires complicated calculations or expressions. In some cases, the expertise needed to create certain reports simply cannot be found in-house and it's necessary to seek the help of an outside consultant.

There are several reasons why your team may lack the skill set to produce all your reports. Not all organizations have as assigned HRIS (Human Resource Information Specialist). But neither an HR/Payroll generalist nor an IT specialist generally has the functional and technical knowledge and skills to fully understand the nuances of HR/Payroll data and be able to manipulate the report writer to generate accurate results.

Maybe you had a longtime employee with legacy knowledge that they didn't leave behind when they quit or retired. Perhaps you had a database superstar—someone who understood all the ins and outs of your systems and could create stellar reports—but that person has moved on and you haven't yet replaced him or her.

When a person with niche skills or legacy knowledge leaves a company, a gaping hole of expertise can result. Two weeks is often not enough time for the departing employee to perform a "brain dump" for the benefit of their department.

In her article “Leaders, Don’t Let Knowledge Walk Out the Door,”[1] industrial and organizational psychologist Dr. Marla Gottschalk suggests ways companies can capture valuable information from key employees well *before* those employees leave, including using platforms designed to share content with others across an organization, mentoring programs for new employees and an open platform blog where the more skilled employee can share insights.

If you think you might find yourself short-handed, and you know that such a shortfall could leave you with a knowledge gap, it would be wise to have a consultancy on retainer who can step in and do the work. If you require more complex expressions or reporting, and that knowledge cannot be had in-house, you’ll want to investigate an outside technical consultant with additional training beyond the skill set of an HR or payroll professional.

Meeting Your Payroll Systems Reporting Challenges

New regulatory requirements and the constant changes require frequent data collection and reporting.

Obtaining comprehensive training for your team, understanding the key data elements and where they exist in the system, capturing legacy knowledge through outstanding documentation, and retaining consulting support where necessary will help you get your reporting done accurately and on time. With this foundation in place, valuable information held within your HR/Payroll system is unleashed to aid decision-making throughout your organization.

[1] https://www.linkedin.com/pulse/20141120145500-128811924-leaving-a-legacy