

How to Set Up Workplace Giving in Payroll

All current payroll systems or accounting software can facilitate Workplace Giving. The set-up process is straightforward following this step-by-step guide:



STEP 1

Employee completes and submits Workplace Giving Form to payroll. Payroll completes form and enters deduction request against personal file. Payroll sends completed form to workplacegiving@caritas.org.au.



STEP 2

Caritas Australia will supply payroll with your unique Supporter ID number that will be used to identify your donation.



STEP 3

Finance/Payroll set up Caritas Australia as vendors in payroll system.

Caritas Australia bank details

Bank: Commonwealth | **Acct Name:** Caritas Australia | **BSB:** 062 438

Acct: 10072432 | **Description:** Your unique Supporter ID number and 'WPG'



STEP 4

If your organisation is matching Workplace Giving donations, determine when matched funds will be transferred to Caritas Australia (e.g. monthly, quarterly, annually)



STEP 5

Caritas Australia will acknowledge the receipt of funds via email.



STEP 6

Optional: Payroll produces monthly report including:

- Participation % = total staff / number of employees giving pre-tax
- Total donation amount (per charity) per pay period



STEP 7

At the end of financial year, total workplace giving donations are recorded on each employee's PAYG summary.