Elite Super simplifies administration, boosts staff efficiency with MyWorkpapers

Northern New South Wales-based Elite Super has been providing professional auditing services for business clients for more than a decade.

From offices in Kempsey and Coffs Harbour, the firm’s six staff deliver support and advice for accountants and SMSF administrators. The firm prides itself on using paperless workflows to improve efficiency and deliver the best possible level of service.

The Challenge

About 12 months ago, Elite Super realised that the CCH Engagement software it had in place for managing workflows and processing audit reviews was no longer providing the support required by staff. Manual processes were constantly needed to extract trial balance and other details and the application was struggling to cope properly with increasing client file numbers.

“We undertake about 1200 audits each year and so the workload on the system was high,” says Elite Super Principal Katrina Fletcher. “As well as the growing manual workload for staff, we were starting to notice that our computer server was being run into the ground. It was clearly time for a change.”

The Solution

After reviewing a range of options, a decision was made in mid 2015 to replace CCH Engagement with the cloud-based MyWorkpapers. “We had heard MyWorkpapers was integrating with Class Super which is used by a number of our clients,” says Fletcher. “Once we understood the benefits that it could provide for us, we took the decision to use it for our entire client base.”

It took the firm about a month to fully implement the new application and make changes to existing work templates to allow them to be automatically populated with client details by the software. Staff were also trained in how to use the new portal and system features. Once this was completed, MyWorkpapers began to support all the firm’s audit work activity.

Read on to see the benefits to Elite Super
The Benefits

The Transition

Fletcher says the firm’s staff quickly came to appreciate the features and capabilities offered by the new system. “The fact that it integrates with Class and can automatically load trial balances was a big benefit in itself,” she says.

“We can also log directly into the client Class accounts which makes our workflows much more efficient as we can readily check data feeds and the status of files. The software also populates other fields within our templates and removes quite a bit of manual processing, making it a very valuable tool.”

A New Approach

Fletcher says that, as MyWorkpapers is a cloud-based application, it has allowed a more flexible approach to work. She is now able be as productive at home or any location as she is in the office. It has also removed the need to invest in another office computer server.

“The fact that the portal also sits within the audit file itself has also been a big plus for us. Previously, we had to work with a separate portal which did not integrate as well. This capability was a very pleasant surprise.”

The End Result

Fletcher says clients have also benefited from the change. They can log in via the MyWorkpapers portal and see comments and review points that have been added to their audit files. “It removes the need for long email trails where we are seeking extra information or clarification,” she says. “This helps to make everyone more efficient and, on all levels, it is a much better way of working.”

Fletcher says that, while MyWorkpapers has saved her firm some administrative time in the current financial year, she expects these savings to grow significantly in future years.

“We have been able to do things like set up permanent documents with comments, which we could not do before. This will save us large amounts of time as we work with clients in subsequent years.”

With the capabilities of MyWorkpapers continuing to grow, Fletcher says she is confident it will be a valuable tool for Elite Super for many years to come. “It continues to evolve and is becoming the best product of its type in the industry,” she says.