

**Sulphur Springs Union School District**  
**LEAD PAYROLL/BENEFITS SPECIALIST**

**DEFINITION**

Under direction of the Director of Fiscal Services, coordinates and oversees timely preparation and maintenance of certificated and classified payrolls. Maintains records and prepares reports related to payroll and employee benefits. Performs advanced technical and clerical accounting and financial record keeping activities involving the preparation, processing, and maintenance of payroll. Is able to read, interpret, analyze, and prepare data to support employer/employee relations, and budgetary processes. Prepares and maintains appropriate accounts involving posting and balancing to general ledger.

**CLASS CHARACTERISTICS**

The Lead Payroll/Benefits Specialist represents the second and senior-most level in the Payroll accounting series. Advancement to Lead Payroll/Benefits specialist requires a complete understanding of certificated and classified payroll and benefits systems and appropriate laws, regulations, and reporting requirements. Advancement to lead Payroll/Benefits Specialist is also based on need and requires the ability to lead, integrate and participate in all aspects of payroll operations, train others, audit, and participate in making adjustments to computer-aided payroll systems.

**EXAMPLES OF DUTIES**

The tasks listed in this section are representative of duties assigned to positions in this class. This list is not intended to be an exhaustive list of all of the tasks assigned to positions in the class, and it is not expected that all of the tasks listed are necessarily assigned to all positions in the class.

- Coordinates, oversees and participates in the processing of all District payrolls including computation and posting of employee time, subtraction of appropriate deductions and preparation of required reports.
- Provides payroll system training to other employees assigned to Payroll and system users at school sites. Establishes procedures and communicates information to those involved with payroll.
- Acts as a liaison between payroll technicians and human resources specialists.
- Interpret California School Accounting Manual, California Education Code, District Policies, legislation, labor agreements and other regulatory information to implement new compensation and benefit programs and modifications;
- Work closely with County Office of Education staff to coordinate District requirements with capability and requirements of business accounting systems;
- Coordinate with schools and departments to ensure timely and accurate flow of information to Payroll section and to employees;
- Confer with STRS and PERS staff to ensure proper classification and service credit for employees.
- Process regular, variable, and retroactive certified, classified, and management payrolls, current year, extra duty payrolls, and salary adjustments;
- Select and apply appropriate program codes for distribution and payroll costs; prepare and reconcile retirement system and employment tax reports.

- Initiate and compile documents to complete payroll-related transactions; input a variety of information, such as hours worked, direct deposits, TSA, and voluntary deduction information into HRS system;
- Update computerized employee records as to benefit changes, longevity increments and special stipends; analyze, calculate, and input adjustments to system to pay absent employees in accordance with applicable Education Code and labor agreement leave provisions; set up and maintain computerized tables of classification, compensation, and benefits plans and work year calendars.
- Resolve payroll disputes; communicate with school and departmental staff to expedite payroll processing and problem resolution; interface with personnel staff to obtain and verify information, correct discrepancies and expedite payroll-related transactions.
- File payroll time sheets, HRS reports, correspondence, and other payroll-related documents; sort, review, and distribute payroll checks and documents.
- Prepare employee salary data information and summaries requested by external agencies; prepare salary projections and calculations for budgetary and negotiation purposes.
- Research, gather, tabulate, assemble, analyze, summarize, and reconcile payroll-related information and records; screen documents for accuracy and completeness; check and correct discrepancies; return documents to originator; certify eligibility of placement on and removal of employees from payroll and benefits.
- Prepare and assist in the preparation of payroll/benefits statements, projections and reports; reconcile computer-generated and manual reports with control figures; prepare Federal and State payroll tax reports.
- Process new employee benefit applications; reconcile vendor and District health and welfare enrollment; distribute fringe benefit costs; prepare voluntary deduction payments. Administer COBRA and retiree benefits programs, receive and record payments and monitor timelines. Coordinate open enrollment with benefit carriers and administrators. Distribute open enrollment information to staff; serve as a liaison for employees with benefit carriers and administrators; assist employees to understand benefit plans and options, leave procedures, and TSA certification. Transmit unemployment insurance claims and process workers' compensation adjustments.
- Maintain records of paid leave earning, use, and eligibility.
- Perform ongoing quality control and auditing functions to ensure that payroll transactions are properly recorded and that adjusting and/or correcting entries are timely.
- Process accounts payable documents to generate warrants for assigned areas of accounts payable. Prepare and assist in the preparation of accounting reports.
- Answer telephone and written inquiries and give out authoritative information on records maintained; answer telephone, transfer calls, and take messages. Verify employment and payroll information.
- Operate various office machines, including a typewriter, calculator, photocopier, computer terminal, printer, and other standard office machines; use specialized HRS, spreadsheet, database, and standard software to input, format, sort, and extract information.
- Calculate and process wage garnishments.
- Maintain logs, lists, and files; file in alphabetical and numerical order. Duplicate, collate, staple, and distribute materials. Prepare, post, total and summarize manual and computer spreadsheets.

Keyboard lists, notices, forms, reports, routine correspondence, and other payroll-related documents.

- Develop or assist in the development of payroll record keeping and processing procedures.
- Serve on assigned committees and teams.
- Participate in District mandated training and retraining programs.
- Perform related work as required.

## **QUALIFICATIONS**

### **Knowledge of:**

- Thorough knowledge of the laws, regulations, and procedures that govern payroll and payroll processing.
- Accounting procedures used in education and general ledger record keeping.
- Methods, practices, and terminology used in automated payroll record keeping and processing. Basic methods, practices and terminology used in school accounting. English usage and grammar.
- Knowledge of employee contracts and benefits plans.
- Computer software related to payroll record keeping.
- Advanced computer terminal and microcomputer operating techniques related to payroll record keeping, database, spreadsheet, and text processing.
- Modern office equipment and procedures.
- Applicable codes and regulations.
- Business mathematics.
- Telephone etiquette.
- Customer service practices and protocols.

### **Ability to:**

- Perform responsible, specialized payroll and employee benefit processing work with a high degree of accuracy and attention to detail.
- Collect, interpret, and analyze payroll and employee benefit related data, identify problems, evaluate alternative solutions and prepare sound recommendations.
- Perform work in accordance with established guidelines and strict timelines.
- Learn and apply laws and codes governing payroll and retirement in California, as well as policies, procedures, and labor contracts used by the District.
- File in alphabetical and numerical order.
- Compare numbers and detect errors.
- Operate office equipment, including a calculator and computer terminal accurately and efficiently.
- Operate a typewriter-style keyboard to key numbers, letters, and symbols, accurately and efficiently.
- Use advanced functions of standard and specialized payroll-related computer software proficiently.
- Make arithmetical calculations with speed and accuracy.
- Read, understand, and interpret written information, such as labor agreements, accounting manuals, employee benefit plans and regulations and applicable provisions of the Education Code.

- Deal tactfully, calmly, and firmly with administrators and staff.
- Communicate effectively orally and in writing.
- Maintain the strict confidentiality of privileged and sensitive information, and labor relations “confidential” information (as defined by EERA)
- Understand and carry out oral and written instructions.
- Establish and maintain effective relationships with those contacted in the course of work.

**TRAINING AND EXPERIENCE**

A minimum of 2 years of successful experience serving in the payroll department of a school district with experience in both certificated and classified payroll processing. A typical qualifying entrance background is two years of responsible experience performing specialized human resources and/or payroll processing work in an automated systems environment.

**PHYSICAL ABILITIES AND WORKING CONDITIONS OF EMPLOYMENT**

The Physical Abilities and Other Conditions of Employment and the Associated Tasks listed in this section are representative of, but are not intended to provide an exhaustive list of Physical Abilities and Other Conditions of Employment and Associated Tasks which may be required of positions in this class. Sulphur Springs Union School District encourages persons with disabilities who are interested in employment in this class and need reasonable accommodation of those disabilities to contact the Personnel Department for further information.

**PHYSICAL DEMANDS**

**Vision:** (which may be corrected)

Read small print

See small objects at a distance of 2’

View a computer screen for prolonged periods

**Hearing:** (which may be corrected)

Understand speech over a telephone

**Speech:**

Speak with a level of proficiency and volume to be understood over a telephone

**Upper Body Mobility:**

Use hands and fingers to feel, grasp, and manipulate objects, manipulate fingers, twist and hands at wrist and elbow

Extend arms to reach outward and upward

Use hands and arms to lift objects, turn, raise, And lower head

**ASSOCIATED TASKS**

**To Perform Tasks Such As To:**

Read payroll printouts

View data on computer screen

Input data, create spreadsheets and reconcile reports

**To Perform Tasks Such As To:**

Explain payroll information to employees

**To Perform Tasks Such As To:**

Respond to questions from employees

**To Perform Tasks Such As To:**

Use a 10-key calculator, input data into small computer, turn pages in bend reports, and assemble paperwork and fasten with staples and paper clips

Reach for reference materials, files, and across desk

Look at computer screen and desktop

**Lower Body Mobility:**

Sit for prolonged periods of 30 minutes

**Strength:**

To lift, push, pull and/or carry objects which weigh much as 15 pounds on a frequent basis

**Environmental Requirements:**

Constant work interruptions

Work independently

Work cooperatively with others

Work around others

Work inside

**Mental Requirements:**

Read, write, understand, interpret, and apply moderately complex information for successful job performance

Math skills at an advanced level

Comparing

Compiling

Analyzing

Learn quickly and follow verbal procedures and procedure standards

Listen

Write/compose

**To Perform Tasks Such As To:**

Enter data to computer

**To Perform Tasks Such As To:**

Pick up reference book, binders, and payroll as reports

**To Perform Tasks Such As To:**

Respond to telephone calls and answer questions from staff

Perform assigned duties without constant monitoring

Resolve problems, process deductions, obtain information

Perform payroll and other accounting work in an office

Perform work in an office setting

**To Perform Tasks Such As To:**

Read, understand, interpret, and apply accounting/payroll information

Reconcile and balance accounts

Match documents to payments

Gather information for reports

Review payroll activity

Respond to changes in policy and

Understand concerns of employees

Compile reports