

Sulphur Springs Union School District
PAYROLL/BENEFITS SPECIALIST II

DEFINITION

Under general supervision, performs intermediate-level payroll work involving the review, verification, research, preparation and maintenance of District employee timesheets, financial records, employee benefits, data and reports, and other pertinent information related to payroll services. Is able to read, interpret, analyze, and prepare data to support employer/employee relations, and budgetary processes; to have a high level of sensitive communication with District staff; and to perform related work as required.

CLASS CHARACTERISTICS

This classification differs from the Payroll/Benefits Specialist in that the duties and responsibilities are more complex and technical in nature, and thus require a higher degree of initiative and independence. This classification serves as the first level of support in technical knowledge for the Payroll/Benefits Specialist position. Positions in this class perform responsible and specialized payroll and employee benefits processing and record keeping as a primary assignment. Incumbents may perform other accounting and financial record keeping and business office administrative support work. Incumbents at this level are expected to have an understanding of the district payroll-personnel system and accounting system at a level necessary to understand the relationship of their work to the total system. In addition to payroll accounting skills, incumbents at this level need interpersonal relationship and communication skills necessary to communicate information effectively orally and in writing. Incumbents work with a high level of independence in performing assigned payroll functions. In addition, incumbents are expected to use initiative to resolve payroll problems and to problem-solve when changes in regulation or District compensation and benefit packages necessitate changes in procedures. Positions in this class are designated confidential under the provisions of the EERA. Incumbents are required to maintain the strict confidentiality of information related to the district's employer/employee relations activities.

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.

Performs intermediate to advanced-level recordkeeping and processing as related to payroll services. 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; supports the Payroll/Benefits Specialist in processing payroll; 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 insure 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 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:

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.

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.

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 one (1) year of successful experience serving in the payroll department of a school district with experience in both certificated and classified payroll processing. Proficient in payroll processes on certificated and classified payroll systems to a level that allows the applicant to work independent of support for the majority of tasks.

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

Lower Body Mobility:

Sit for prolonged periods of 30 minutes

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

To Perform Tasks Such As To:

Enter data to computer

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:

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

Work Environment

The work environments described here are representative of those an employee will encounter while performing the essential functions of this job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential functions of the job.

- Positive Environment

Work is usually performed in an office environment

- Exposures, Risks, and Hazards

While performing the duties of this classification, the employee is occasionally exposed to the normal risks of using and moving office-related equipment

The Sulphur Springs Union School District is an equal opportunity employer and does not discriminate on the basis of age, ethnicity, race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, sex, or sexual orientation.

Board Approval: January 18, 2023