

SANTA CLARA COUNTY OFFICE OF EDUCATION

CLASS TITLE: PAYROLL SERVICES SPECIALIST - LEAD

BASIC FUNCTION:

Under the direction Manager – Payroll Services, performs a variety of highly difficult, responsible, complex, technical, and non-routine accounting and statistical functions in the preparation, processing, distribution, maintenance and verification of payroll, employee attendance, seniority and related records and reports for certificated and classified employees of the Santa Clara County Office of Education. Oversees, guides, organizes, and leads the work of individuals and teams within the payroll classifications and individuals performing payroll functions, trains payroll employees and substitute employees on work procedures and standards. Promotes a culture of customer service and responsiveness, while ensuring that department objectives, goals, policies, rules, guidelines, and operating procedures are observed, reinforced, and maintained in support of County Office goals and objectives. This position is designated as staff level.

DISTINGUISHING CHARACTERISTICS:

This class is designed to prepare incumbents for promotional opportunities into higher levels of employment. The incumbent is expected to consistently work independently with limited direction in carrying out assigned tasks in a fast-paced environment, which are subject to change into complex situations, depending on unknown and quickly developing variables. The incumbent must be able to quickly troubleshoot a variety of commonly occurring problems and calmly handle suddenly developing, complex problems and situations with wide ranging impact and adverse financial consequences. The incumbent is also expected to make recommendations for improvement regarding day-to-day operations, and to assist in guiding, training, and organizing the work of payroll employees and substitutes.

REPRESENTATIVE DUTIES:

The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.

ESSENTIAL DUTIES:

Assists in organizing, overseeing, and assigning the work of payroll employees; assists in training, monitoring, and guiding the work of assigned employees; assists in resolving routine and complex payroll related problems, which may arise suddenly, be of an urgent nature, and require extensive and detailed research collected from multiple sources and locations, requiring a high degree of coordination, analysis and synthesis of information; assists in coordinating and facilitating cross-departmental work teams as needed.

In a strategic customer-oriented manner, communicates with County Office of Education personnel, and others, regarding payroll related concerns and issues to provide outreach as a partner with the greater County Office of Education community.

Assists in reinforcing County Office of Education payroll policy and standards and expectations through modeling service-oriented, appropriate, and professional behavior; assists in recommending and developing policy and procedural improvement for Payroll to ensure implementation of constant improvement and greater efficiency; monitors, audits, and assists in overseeing the work of payroll employees.

Prepares, balances, distributes and assists in overseeing payroll, including preparing and processing manual warrants, supplemental payrolls and payroll adjustments, which may include past due time sheets and other irregular or non-recurring payments; calculates and assists in overseeing calculation of retroactive salary distributions, adjustments, or increases.

Organizes, prepares, verifies, and assists in overseeing the processing and maintenance of payroll documents in compliance with laws, regulations, contracts, collective bargaining agreements, and departmental and agency policy; researches and analyzes required or requested adjustments; reviews and verifies employee authorizations to ensure the proper accounts are charged.

Adjusts, corrects, verifies, accurately maintains, and assists in overseeing employee salary placement, hours, and daily rates, and associated calculations for retirement, bargaining unit status, State Disability Insurance (SDI), social security, mandatory Medicare, and deferred pay; monitors limited term and substitute employee assignments for PERS and STRS eligibility and ensures such assignments are within established policies; verifies proper accounts are used for all payments and calculations.

Coordinates, assists in overseeing, and makes highly complex calculations to arrive at proper leave usage and wage calculations, including SDI medical and FMLA claims; tabulates and maintains balances for sick leave, vacation, and contract days, and adjusts salary as necessary; monitors medical leaves for limitations and possible placement on 39 month reemployment list; assists in resolving any issues impacting proper leave usage and application.

Analyzes, audits, and assists in overseeing proper processing of employee attendance reports and records for accuracy and completeness; reviews, and verifies time worked; maintains and audits the absence tracking system; calculates, records, and monitors salary adjustments, overtime pay, and compensatory time for accuracy.

Establishes and assists in overseeing the proper set-up of pay screens, which is not limited to, but may include extra duty, out of class, overtime, special compensation, retroactivity, and vacation pay outs; determines and ensures the proper pay codes for all applicable compensation and rates of pay.

Calculates and maintains classified seniority lists from payroll documents for public seniority lists.

Confers, assists, and serves as a resource to other departments, districts or outside agencies regarding payroll and payroll related items, which includes but is not limited to grant proposals or implementation, retirement, SDI, W-2's, unemployment, workers' compensation; provides in-service training for employees on a variety of payroll related matters such as leaves, attendance reporting, timesheets, and payroll processes and procedures.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Appropriate laws, codes, regulations, requirements, and standards relevant to public educational agency payroll.

Principles of payroll administration including development and maintenance of sound internal controls and auditing procedures.

Advanced mathematical calculations and financial and statistical analysis.

Proper methods, practices, and procedures used in public educational agency payroll.

Modern office methods, practices, and procedures.

Proper use and operation of standard office equipment and machines such as calculator, adding machine, printer, desktop computer, fax machine, and/or microfilm reader.

Software programs such as Excel, Laserfiche, Outlook, and Microsoft Word, and software and online platforms relevant to payroll and responsibilities as a public educational agency employee.

Proper English usage including, grammar, punctuation, spelling, and sentence structure.

ABILITY TO:

Perform and oversee a variety of complex payroll analyses, auditing, and monitoring, including gathering, organizing, and analyzing varied payroll data.

Provide guidance, training, and work oversight to payroll staff as well as payroll advice and consultation to management and staff and/or school districts.

Plan, organize, and prioritize individual work assignments, and assignments of others, to meet requirements and facilitate workflow.

Identify problem areas or situations, evaluate problem causes, and take appropriate action to resolve identified problems.

Understand and perform advanced payroll and statistical computations relevant to accurately performing payroll responsibilities.

Understand and carry out both oral and written directions without continuous supervision.

Use courtesy and tact in a variety of stressful situations including public contacts, both on the telephone and in person and communicate effectively in written form.

Accurately interpret and apply pertinent laws, codes, rules, and regulations.

Reconcile differences within payroll, retirement, and accounting systems using highly developed analytical skills.

Establish, prepare, and maintain complex payroll records, summaries, and reports.

Troubleshoot and quickly identify problem areas or situations, evaluate problem causes and take appropriate action to resolve problems identified, and develop procedures as needed.

Plan, organize, and perform, and oversee payroll responsibilities to meet designated time requirements.

Multitask in a fast paced environment.

Establish and maintain effective work relationships with those contacted in the performance of required duties.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: Associate's degree from an accredited college, with course work in budgeting, accounting, payroll, or finances, and three years of increasingly complex and varied payroll experience. Experience leading a team or work group is desirable and may afford preference.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment, while sitting at a desk.
Contact with or constant interruptions by management and employees.

PHYSICAL DEMANDS:

Hearing and speaking to exchange information in person and on the telephone.
Seeing to read, prepare and proofread documents.
Sitting for extended periods of time and walking short distances.
Dexterity of hands and fingers to operate a computer keyboard and other office equipment.
Kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies.
Lifting light objects.

Approved by Personnel Commission: April 12, 2017



Kristin Olson
Director-Classified Personnel Services

Date: 04/12/2017