



## HUNTINGTON BEACH CITY SCHOOL DISTRICT

### Lead Payroll/Benefits Technician

Established date: 7/1/2015

Revision date: 11/17/2015

#### **GENERAL PURPOSE**

Under general supervision, leads and participates in the work of other employees engaged in specialized technical and administrative activities involved in the processing of the District's payroll and benefits to ensure the timely, accurate payment of District employees, and to ensure the effective administration of employee benefit plans; oversees the maintenance of benefits-related data; and performs related duties as assigned.

#### **DISTINGUISHING CHARACTERISTICS**

Lead Payroll/Benefits Technician is the advanced skilled and working lead class in the Payroll/Benefits Technician class series. In addition to performing the full range of payroll and benefits processing duties, incumbents may provide work direction to other employees and is the District's subject-matter expert in the area of payroll and benefits. Assignments are typically received in general terms, and incumbents are expected to act independently within the framework of established policies, procedures and objectives.

This position is directly responsible to the Director of Fiscal Services or his/her designee.

#### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Leads, provides work guidance and direction and participates in the work of payroll/benefits staff; participates in scheduling, assigning and monitoring work of other employees for completeness, accuracy and conformance with District standards; provides information, instruction and training on work processes, proper use of equipment and safe work practices; provides input to the manager on employee work performance and behaviors; assists in ensuring a fair and open work environment in accordance with the District's commitment to equal employment opportunity.
2. Verifies, audits, edits and processes employee payrolls in accordance with policies and procedures; verifies accurate reporting of changes in pay, payroll status, benefits, taxes, voluntary contributions, garnishments and other deductions, as well as retroactive pay adjustments and terminations; verifies attendance and work hours data; makes corrections in the county system prior to payroll run; approves payroll report for payment.
3. Distributes accounting and fringe benefit reports to accounting and Human Resources prior to payroll production; utilizes spreadsheet programs and computer database systems to retrieve a wide variety of routine to complex payroll and benefits data, reports and information; compiles, generates and distributes required reports; records leaves of absence and maintains files of supporting documents.
4. Verifies checks and direct deposit statements received from the county each pay period and sorts for distribution; attends workshops offered by the Orange County Office of Education involving changes to the payroll system, new payroll functions or changes to pension plans.
5. Oversees benefits enrollment processes; distributes benefits plan descriptions, promotional materials and notices in compliance with legal and regulatory requirements; explains, interprets and counsels employees regarding employee rights and benefits plan coverage, eligibility for benefits and

claims procedures; for new hires and employee open enrollment changes, verifies employee and dependent plan eligibility and accurate completion of enrollment forms; processes enrollments in the District's financial systems.

6. Establishes and maintains payroll records and files; keeps abreast of changes in federal and state rules and regulations and updates and maintains payroll codes, retirement rates and federal and state tax changes; enters employee salary, deductions and tax information in the payroll system; receives, notifies employees and processes and enters wage garnishments; reviews, audits and corrects records, as necessary.
7. Ensures the District meets legal requirements in regard to payroll taxes and garnishments and provides all necessary information and payments to IRS, state tax authorities and other regulatory bodies; enters federal and state withholdings and voluntary deductions; performs manual tax calculations as necessary using federal and state annual tax tables.
8. Interprets payroll and benefits policies and procedures and provides accurate and timely information and assistance to management and employees; researches and responds to daily inquiries from employees on a wide array of technical matters; assists schools and departments in analyzing and resolving issues.
9. Performs general accounting support functions as needed.
10. Prepares Board resolutions and reports; maintains required files and records; attends meetings; participates in District training.

### **MINIMUM QUALIFICATIONS**

#### **Knowledge of:**

1. Methods, practices, documents and terminology used in payroll recordkeeping.
2. Methods, practices, documents and terminology used in benefits administration.
3. Laws, regulations and MOU provisions applicable to timekeeping, payroll preparation and pay reporting.
4. District ordinances, codes, policies, procedures and practices for processing and recording accounts payable and related financial transactions.
5. Operations of the District's various financial systems.
6. Customer service practices and telephone etiquette.
7. Principles and practices of sound business communication; correct English usage, including spelling, grammar and punctuation.
8. Bookkeeping and elementary accounting practices and procedures.
9. Records management, recordkeeping, filing and basic purchasing practices and procedures.
10. Practices and techniques for scheduling and coordinating the activities of other payroll/benefits staff.
11. District personnel policies and labor contract provisions; requirements and processes of the District payroll system.
12. Basic employee/labor relations principles and practices, including contract administration.
13. Uses and operations of computers, standard business software and specialized database and spreadsheet applications.

#### **Ability to:**

1. Assign and inspect the work of payroll/benefits personnel.
2. Collect, obtain, evaluate and interpret technical and specialized payroll information correctly and explain information accurately and precisely to employees.
3. Prepare clear and accurate financial and statistical records and reports.
4. Input data accurately at a speed necessary to meet the requirements of the position.
5. Operate a computer, standard business software and a variety of computer software programs and databases related to area of assignment.
6. Understand, interpret, apply and reach sound decisions in accordance with applicable law, rules, regulations and department procedures.
7. Maintain highly confidential information.

8. Determine work priorities during peak workload periods, using sound judgment in the application of policies, rules, regulations and standard operating procedures.
9. Communicate effectively, both orally and in writing.
10. Understand and follow written and oral instructions.
11. Establish and maintain effective working relationships with administrators, staff, students, parents, the public and all those encountered in the course of work.

### **Education, Training and Experience:**

A typical way of obtaining the knowledges, skills and abilities outlined above is:

Graduation from an associate's degree program in accounting or bookkeeping and at least four years of progressively responsible experience in payroll and benefits related duties; or an equivalent combination of training and experience. Additional experience of the specified type may be substituted for the required education. Experience in a school district is preferred.

### **Licenses; Certificates; Special Requirements:**

Some assignments may require a valid California Class C driver's license and the ability to maintain insurability under the District's vehicle insurance program.

Successful completion of a comprehensive background investigation including a review of employment history, criminal conviction record and fingerprinting is required.

### **PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **Physical Demands**

While performing the duties of this job, the employee is regularly required to sit, walk and stand; talk and hear; use hands to finger, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is frequently required to lift up to 30 pounds unaided.

Specific vision abilities required for this job include close vision and the ability to adjust focus.

#### **Mental Demands**

While performing the duties of this class, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses math and mathematical reasoning; observes and interprets people and situations; learns and applies new information and skills; performs highly detailed work; deals with constant interruptions and multiple concurrent tasks; and interacts with others encountered in the course of work, including frequent contact with customers and/or the public and dissatisfied/abusive individuals.

### **WORK ENVIRONMENT**

The employee works in an office environment where the noise level is usually quiet to moderate.

FLSA Designation:	Non-Exempt
EEO Category:	Paraprofessional
Bargaining Unit:	CSEA
Probationary Period:	9 months new, 6 months existing