

Draft Classification Standards – Rev. 03/29/2024

Payroll Professional Series

Class Title	Class Code	Issue Date	FLSA
<i>Payroll Professional</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Senior Payroll Professional</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Principal Payroll Professional</i>	XXXX	XXXX	<i>Exempt*</i>

OVERVIEW:

Positions classified within the Payroll Professional series are directly responsible for accurate and timely processing of payroll activities at the university. They play a crucial role in ensuring accurate and efficient payroll processing for university employees. Payroll professionals provide payroll operations review and oversight and ensure compliance with payroll laws and regulations.

Positions are assigned to classifications within the series based on the scope and complexity of payroll activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include, but are not limited to, payroll processing, maintaining accurate financial and employee records, identifying opportunities to streamline payroll processes, improve efficiency, and enhance payroll related systems or processes. Positions ensure compliance with all relevant laws and regulations; and support various stakeholders in all matters related to payroll. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels within the series.

Payroll Professional – Professional who applies acquired job skills, policies, and procedures to complete significant assignments, projects, and tasks of moderate technical scope and complexity. Draws from prior experience and knowledge of accounting principles and concepts to exercise judgment while performing a variety of payroll activities. Ensures compliance with university payroll standards, protocols, guidelines, and operating procedures as well as state and federal laws, and state administrative procedures. Provides input for new programs and procedures as well as other quality improvement initiatives. Provides training and guidance to campus partners on payroll transactions. Analyzes and researches overpayments and/or errors. Audits detailed payroll reports and transactions on a monthly basis, researches discrepancies, and partners with relevant parties to correct errors. Provides support for audits.

Senior Payroll Professional – Professional who applies advanced job skills, in-depth organizational and stakeholder acumen, and project management skills to complete substantive assignments, projects, and related work of significant technical scope and complexity. Exercises advanced discernment and in-depth knowledge of payroll best practices, state and federal laws, university and state guidelines, and advanced experience to determine appropriate action. May require the development of new

* This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee's actual exemption status may differ based on salary rate and actual duties performed.

approaches, techniques and innovation to address issues. Works with stakeholders to ensure proper implementation of programs by utilizing persuasion.

Principal Payroll Professional – Technical leader with a high degree of knowledge in the payroll field, state and federal laws, and recognized state and university payroll policies and guidelines. Problem-solving frequently requires analysis of unique issues or problems without precedent and/or structure and new approaches, methods, techniques, or innovation. In collaboration with management, position may be accountable for development, implementation, and maintenance of policies and processes.

TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (*May include but are not limited to*):

- ***Payroll Processing Oversight*** – Ensures accurate and timely processing of payroll transactions, including new hires, terminations, salary changes, benefits deductions, and retirement code determinations. Reviews and validates payroll data for accuracy and completeness, resolves any discrepancies or issues as needed. Prepares and distributes payroll reports to relevant stakeholders, while ensuring confidentiality and data security.
- ***Compliance and Regulations*** – Knowledgeable and stays up to date with federal, state, and local payroll laws, regulations, and tax requirements, while ensuring compliance in payroll processing. Prepares documentation in support of all relevant payroll tax filings and reports in accordance with applicable regulations. Collaborates with Human Resources and Finance departments to ensure accurate and timely reporting of payroll data for audits and compliance reviews. Responds to payroll-related inquiries from various stakeholders, both internal and external.
- ***Systems and Technology*** – Collaborates with IT and HR teams to implement payroll system enhancements, upgrades, and integrations to improve payroll processes and efficiency. Conducts regular audits of payroll data and system configurations to ensure accuracy and data integrity.
- ***Customer Service*** – Provides exceptional customer service to departments, payroll technicians, and employees by promptly and accurately responding to payroll inquiries, resolving issues, and providing guidance on payroll-related matters.
- ***Process Improvement*** – Identifies opportunities for process improvements and automation in payroll processing, ensuring efficiency, accuracy, and compliance. Collaborates with cross-functional teams to implement process enhancements, streamline workflows, and eliminate manual tasks.

PAYROLL PROFESSIONAL

Under general supervision, performs payroll activities at the university. Work is reviewed for soundness of technical judgment. Applies professional level knowledge of the payroll field. Ensures accurate and timely processing of payroll, maintains compliance with payroll laws and regulations, and provides support to university employees regarding payroll matters. Works independently on most day-to-day assignments with general supervision on new assignments or

projects to ensure alignment with objectives. Handles multiple work priorities and is accountable for own work results. May provide lead work direction to less experienced administrative staff.

Work assignments typically include some or all of the following:

- ◆ Oversees the end-to-end payroll process for university employees, ensuring accuracy, timeliness, and compliance with applicable laws and regulations.
- ◆ Review and verifies payroll data, including timesheets, deductions, and benefits, to ensure accuracy and completeness.
- ◆ Processes payroll adjustments, such as overtime, bonuses, as well as leave accruals, while ensuring accurate calculation and application of payroll-related taxes and deductions.
- ◆ Prepares and distributes payroll reports, including earnings statements, tax forms, and other payroll-related documents, to employees and relevant stakeholders.
- ◆ Collaborates with HR and finance departments to ensure accurate and timely transfer of payroll data and information.
- ◆ Reconciles payroll-related accounts and resolves discrepancies or issues as they arise.
- ◆ Stays current on payroll laws, regulations, and best practices in the higher education industry, ensuring compliance and recommending process improvements.
- ◆ Prepares documents to support payroll-related tax filings and compliance reports, ensuring accuracy and compliance with applicable laws and regulations.
- ◆ Recommends improvements in processes, procedures, and protocols. Participates in the implementation and testing of payroll system upgrades or enhancements.
- ◆ Serves as a subject matter expert in the administration of a leave management and/or time reporting system.
- ◆ Provides guidance and support to other payroll technicians, as needed.
- ◆ Performs work of a non-routine nature.

MINIMUM QUALIFICATIONS:

Knowledge and Skill:

- ◆ Working skills and knowledge of accounting, finance, business administration, and/or related roles.
- ◆ Working knowledge and understanding in the appropriate use of payroll principles, practices, and regulations, including tax withholding, benefits and retirement administration, and payroll compliance.
- ◆ Strong analytical and problem-solving skills, with the ability to identify and resolve complex payroll discrepancies.
- ◆ Knowledge of relevant laws, regulations, and compliance requirements related to payroll, including in-depth knowledge of payroll laws and regulations in the higher education industry.
- ◆ High level of integrity and ethical conduct in handling financial transactions and sensitive information.
- ◆ Ability to train others on new skills and procedures and provide lead work direction.

Experience and Education:

Equivalent to a bachelor's degree in a related field and two years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An

advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

SENIOR PAYROLL PROFESSIONAL

Working independently under general supervision, performs advanced work by exercising significant authority for most payroll projects and responsibilities. Applies professional knowledge or expertise in one or more specialty areas, including overseeing accurate and timely processing of payroll, maintaining compliance with payroll laws and regulations, and providing expert guidance and support to university employees regarding payroll matters. Work is performed with minimal oversight focused on ensuring alignment with overall objectives. Demonstrates advanced discernment in selecting methods and techniques for obtaining solutions. Manages complex projects and plays a critical role in maintaining payroll integrity, implementing process improvements, and supporting the university's payroll operations. Decision-making is based on payroll best practices, relevant standards and guidelines, organizational policy, and overall strategies and goals. Handles multiple work priorities and often provides lead work direction with accountability for results.

In addition to duties performed by the Payroll Professional, the Senior Payroll Professional typically performs the following duties:

- ◆ Oversees the end-to-end payroll processes including highly unique and complex appointments. Ensures accuracy, timeliness, and compliance with applicable laws and regulations.
- ◆ Develops and disseminates internal standard operating procedures and processes.
- ◆ Prepares and distributes complex payroll reports to employees and relevant stakeholders, including earnings statements, tax forms, and other payroll-related documents.
- ◆ Provides expert guidance to employees and managers on complex payroll matters, including tax withholding, deductions, and unique pay-related policies and procedures.
- ◆ Prepares and submits complex payroll-related tax filings and compliance reports, ensuring accuracy and compliance with applicable laws and regulations.
- ◆ Leads and participates in the design, implementation and testing of payroll system upgrades or enhancements.
- ◆ Leads payroll-related projects and initiatives, such as process improvements and payroll-related audits.
- ◆ Stays updated on emerging trends and technologies in payroll management, recommending and implementing innovative solutions to enhance payroll operations.
- ◆ Builds and maintains strategic partnerships with key stakeholders.
- ◆ Provides lead work direction and mentoring to payroll technicians and professionals.
- ◆ Performs a broad spectrum of work. Designs new and recommends improvements to processes and procedures.

MINIMUM QUALIFICATIONS:

In addition to Payroll Professional knowledge and skill requirements, work assignments typically require:

- ◆ Thorough and advanced knowledge and understanding of payroll principles, practices, and regulations, including tax withholding, payroll implications of unique appointments and augmentations, benefit impacts, and payroll compliance.

- ◆ Demonstrated competence in independently applying advanced judgement to analyze and resolve difficult and complex payroll problems and compliance issues.
- ◆ Advanced analytical and organizational skills to organize, prioritize and manage the successful completion of projects within time and budget constraints.
- ◆ Advanced communication and interpersonal skills to effectively collaborate with internal and external stakeholders and to develop and deliver training and communications regarding payroll processes and compliance.
- ◆ Advanced skill in mentoring or overseeing the work of other staff.
- ◆ In-depth knowledge of relevant laws, regulations, and compliance requirements related to payroll.

Experience and Education:

Equivalent to a bachelor's degree in a related field and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

PRINCIPAL PAYROLL PROFESSIONAL

Working independently with minimal supervision, performs highly complex payroll work that requires niche knowledge, industry expertise, and excellent understanding of all relevant regulations. Uses payroll expertise to provide expert advice and guidance across the university. Problems are highly complex and solutions may require the creation of new, unprecedented procedures. Serves as a technical expert and collaborates with management in the development and implementation of new programs, policies, and practices. Decision-making often requires integration and interpretation of organizational policies and protocols, professional best practice, financial and organizational impact on program, and persuasion and negotiation with senior management. Functions with a high degree of autonomy. Work is performed independently with limited supervision and often requires utilization of a high degree of persuasion and leadership.

In addition to duties performed by the Senior Payroll Professional, the Principal Payroll Professional typically performs the following duties:

- ◆ Develop and implement efficient and effective payroll processes, optimizing productivity and accuracy. Analyzes, interprets, integrates, and implements business processes outlined in various technical letters, memorandums of understanding, and updated university policies. Creates training and guidelines for payroll staff.
- ◆ Responsible for strategic recommendations having broad campus and often systemwide impact. Performs work that supports short- and long-term goals and objectives.
- ◆ Identifies opportunities for process improvements and automation in payroll processing, ensuring efficiency, accuracy, and compliance.
- ◆ Collaborates with cross-functional teams to implement process enhancements, streamline workflows, and eliminate manual tasks.
- ◆ Collaborates with HR and Finance departments to ensure accurate and timely reporting of payroll data for audits and compliance reviews.
- ◆ Collaborates with IT and HR teams to implement system enhancements, upgrades, and integrations to improve payroll processes and efficiency.
- ◆ Serves as a key technical advisor to management. Provides oversight and recommendations for complex problems and issues.

- ◆ Leads process improvement efforts, often developing new solutions and strategic approaches, in collaboration with management. Addresses problems from a broad interactive perspective using advanced research and analytical skills to conceive new solutions.
- ◆ Oversees payroll operations and provides lead work direction, guidance, and mentorship to the payroll team, fostering a culture of ongoing improvement and professional development.

MINIMUM QUALIFICATIONS:

In addition to Senior Payroll Professional knowledge and skill requirements, work assignments typically require:

- ◆ Expert knowledge and understanding of payroll processing, or related roles.
- ◆ Expert knowledge and skill in applying and interpreting applicable standards, guidelines and, as appropriate, recommend organization policy.
- ◆ Expert analytical and organizational skills to organize, prioritize and manage the successful completion of large, complex, and strategic payroll projects within budget and time constraints.

Experience and Education:

Equivalent to a bachelor's degree in a related field and five years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.