



**Orange County Department of Education  
Human Resources Department  
Classified Class Specification**

**Class Code: 3049  
Date Adopted: 7/1/2024**

**FLSA Status: Nonexempt  
Union Representation: Represented**

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**Payroll Services Specialist**

**GENERAL PURPOSE**

Under direction, performs a variety of difficult and highly specialized technical responsibilities involving the training of county school district personnel on the operations, functions, codes, and processing procedures of Orange County Department of Education's (OCDE) payroll system; participates in systems testing of new payroll applications, conversions, upgrades, and enhancements; develops user manuals and guides; serves as liaison between school district payroll departments and OCDE staff on payroll issues; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Payroll Services Specialists perform difficult and highly specialized technical responsibilities in development, implementation, and user training on OCDE's payroll system. Incumbents are responsible for training school district payroll staff on proper payroll procedures and processes utilizing OCDE's payroll system. Incumbents test payroll system enhancements, updates, new applications, and systems conversion to ensure accurate processing prior to implementation and work with other staff to ensure the accuracy of payroll and retirement processing in accordance with all applicable legal requirements. Work requires a thorough understanding of payroll systems operations, functions, and processes, and applicable legal requirements, and the ability to train and assist payroll staff in county school districts on its uses in their district environments.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

1. Organize, develop, and present training workshops regarding payroll/retirement processing for new school district payroll personnel; conduct on-site visits to all districts to ensure that payroll and retirement systems are being properly utilized and understood; and prepare and present training to OCDE and school district personnel to communicate and provide operational and procedural instruction on payroll/retirement system enhancements or processing changes.
2. Act as an information resource for school districts regarding payroll/retirement applications, taxation, records retention, and best practices; serve as liaison with school districts to resolve payroll systems problems; keep abreast of changing laws and regulations affecting public education employers; and develop up-to-date payroll manuals and materials for use by all school district and OCDE payroll personnel.
3. Serve as an advocate for school district payroll staff to ensure that their information and support needs are met.

4. Work closely with information technology to test programming and systems changes, updates, enhancements, conversions, new applications, and functionalities to ensure accurate processing in accordance with all legal and OCDE/school district requirements; identify systems and programming problems, errors, and concerns; and provide information on correct applications and processes for use by technology staff in resolving problems.
5. Train school district payroll staff on procedures for balancing quarterly tax returns; develop specialized spreadsheets for use in balancing procedures; and act as backup for quarterly tax processing for school district staff when experienced staff is unavailable to prevent late penalties.
6. Prepare, process, and/or submit a variety of reports including State Annual Reconciliation DE7, California State Quarterly Earnings DE678, and State New Hiring Report.
7. Assist districts in processing, balancing, and auditing payroll; balance preliminary and final payrolls; review payroll reports; process deposits; ensure payroll records processed; and provide payroll transfer amounts to the district accounting departments as well as the Orange County Treasurer Office.

#### **OTHER DUTIES**

1. Provides emergency payroll services to school districts in the event their payroll staff is unavailable.
2. Performs other technical and administrative payroll or general accounting duties as needed.
3. Attends a variety of meetings, training sessions, and seminars as required.

#### **QUALIFICATIONS**

##### **Knowledge of:**

1. Federal, state, and local laws, regulations, rules, and guidelines applicable to payroll preparation, pay reporting, and wage attachments.
2. Methods, practices, documents, and terminology used in processing payroll transactions and in payroll recordkeeping.
3. OCDE's payroll systems and associated practices and procedures for processing payroll information and interpreting input and output data at a super-user level of expertise.
4. Methods and techniques for performing quality assurance testing of systems, including methods and techniques for troubleshooting and determining the causes of application problems and errors.
5. Practices and procedures of technical writing used in developing user documentation, manuals, and guides.
6. Operation of standard business software, including spreadsheet applications.
7. Standard office practices and procedures.
8. Principles and practices of sound business communication.
9. OCDE and school district human resources policies and labor contract provisions.

##### **Ability and Skill to:**

1. Conduct workshops and communicate clearly and effectively to diverse audiences of technical and non-technical personnel, orally and in writing.

2. Prepare clear, concise, and comprehensive technical manuals, guides, system user documentation, and other written materials.
3. Develop test scenarios and conduct system testing of payroll applications, upgrades, enhancements, and other changes.
4. Gather relevant data, analyze problems, evaluate alternatives, and make appropriate recommendations.
5. Interpret, apply, and reach sound decisions in accordance with applicable rules, policies, and department procedures.
6. Organize, set priorities, and exercise sound judgment within established guidelines.
7. Make complex calculations and tabulations, and review payroll and related documents and information accurately and rapidly.
8. Operate a computer using spreadsheet and other standard business software; operate other standard office equipment.
9. Understand and carry out written and oral instructions.
10. Prepare and maintain accurate and complete specialized records and files.
11. Deal with sensitive and difficult situations and maintain confidential and sensitive information.
12. Establish and maintain effective working relationships with management, staff, the public, and others encountered in the course of work.

**Education, Training, and Experience:**

A typical way of obtaining the knowledge, skills, and abilities outlined above is an associate's degree in bookkeeping, accounting or related field and six (6) years of experience in payroll; experience in conducting application systems testing; or a combination of training and experience.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class.

**Physical Demands**

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification perform deskwork for extended periods; read written and electronic materials; communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces. May move items weighing up to 25 pounds.

**Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve administrative problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform detailed work; work on multiple, concurrent tasks often with frequent interruptions; work under deadlines and

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meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions. Employees work under typical office conditions, and the noise level is usually quiet.