



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

**Class Code: 3049  
Date Adopted: July 1, 2008**

**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 OCDE's payroll system; participates in systems testing of new payroll applications, conversions, upgrades, and enhancements, and 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 of 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 conversions 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**

*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. Organizes, develops, and presents training workshops regarding payroll/retirement processing for new school district payroll personnel; conducts on-site visits to all districts to ensure that payroll and retirement systems are being properly utilized and understood; prepares and presents training to OCDE and school district personnel to communicate and provide operational and procedural instruction on new payroll/retirement system enhancements or processing changes.
2. Acts as an information resource for school districts regarding payroll/retirement applications, taxation, records retention, and best practices; serves as liaison with school districts to resolve payroll systems problems; keeps abreast of changing laws and regulations affecting public education employers and develops up-to-date payroll manuals and materials for use by all school district and OCDE payroll personnel; serves as an advocate for school district payroll staff to ensure that their information and support needs are met.

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### **ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)**

3. Working closely with Information Technology, tests 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; identifies systems and programming problems/errors/concerns; provides information on correct applications and processes for use by technology staff in resolving problems.
4. Designs and writes reference materials, guides, and manuals for use by school district personnel when utilizing payroll applications.
5. Trains school district payroll staff on procedures for balancing quarterly tax returns; develops specialized spreadsheets for use in balancing procedures; acts as backup for quarterly tax processing for school district staff when experienced staff is unavailable to prevent late penalties.
6. Processes school district State Annual Reconciliation DE7 and California State Quarterly Earnings DE678 reports; prepares IRS quarterly tax returns for charter schools and others as assigned.

### **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 applications 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 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.

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**Ability to: (cont.)**

3. Develop test scenarios and conduct systems 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. Communicate clearly and effectively, both orally and in writing.
12. Deal with sensitive and difficult situations.
13. Maintain confidential and sensitive information.
14. 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 a closely related field; and at least six years of progressively responsible experience in performing payroll duties and functions, including experience in conducting applications systems testing; or an equivalent combination of training and experience. Experience in a public agency is especially desirable.

**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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**

While performing the duties of this job, employees are regularly required to sit, walk, and stand; talk or hear, both in person and by telephone; use hands repetitively to finger, handle, feel, or operate computers and standard office equipment; reach with hands and arms from the waist to at or above shoulder level; bend, stoop, push, pull, grasp, squat, kneel, and twist to open file cabinet drawers, and lift up to 20 pounds from ground, waist, and chest level. Travel over uneven terrain that may include gravel or dirt, carry materials on stairs; some locations may have stairs and will not have elevators.

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

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### **Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret data; use math and mathematical reasoning; analyze and solve problems; learn and apply new information and skills; perform highly detailed work on multiple, concurrent tasks; and interact with management, staff, the public, and others 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 the essential functions. Employees work under typical office conditions, and the noise level is usually quiet.