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Code: TECHNICAL LETTER
HR/PCOS 2012-01

To: Human Resources Officers

Response By: January 20, 2012

From: Evelyn Nazario 
Assistant Vice Chancellor
Human Resources Management

Subject: Campus Review – Draft Payroll Technician Series Classification Standard (Unit 7)

Overview

Audience: Human Resources Officers, Classification/Compensation Managers, and campus management responsible for payroll operations

Action Item: Review draft classification standard and provide feedback by January 20, 2012

Affected Employee Group(s)/Unit(s): Employees in payroll classifications in Unit 7 (CSUEU) and employees in “in lieu” of classifications

Summary

This Technical Letter provides an overview of the revised Payroll Technician Classification Standard and requests your review and feedback of the proposed draft. The classifications in this study include: Payroll Technician Trainee and Payroll Technician.

Study Background: Significant changes in the practices, processes, and technology related to the field of payroll prompted management and CSUEU to request a study of the following classifications:

- Payroll Technician Trainee
- Payroll Technician I, II, III

The proposed draft classification standard was developed based on the results of an internal campus needs assessment survey, as well as review by campus experts in the payroll area and human resource representatives.

Highlights of the Proposed Changes:

- Consistent with the updating of classification standards, the Payroll Technician classifications have been combined into a classification series, titled “Payroll Technician Series.”
- The most common feedback received from campuses via the needs assessment survey indicated that the terminology, resource materials, and activities were outdated and needed to be updated to accurately

Distribution:

CSU Presidents
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reflect the positions today. New systems and technological changes have affected the way the payroll/personnel transactions are handled and processed.

Campus Review: The draft Payroll Technician Classification Standard is attached. Your review and feedback is critical to the development of the final classification standard and assists us in ensuring that the new classification standard meet campuses' operational needs. As you review the attached draft, please consider the following:

- Does the proposed classification standard adequately cover the breadth of work performed by the incumbents today and potentially for the next five years?
- Are the levels properly defined? Are the distinctions between the levels clear?
- Are any critical core functions or work descriptions missing? If yes, please provide these.
- Is the language in the classification standard flexible enough to accommodate ongoing changes in the industry and the differences in campus operations systemwide?

Sending in Feedback: Thank you in advance for your time and effort in reviewing the draft classification standard. We look forward to hearing from you by Friday, January 20, 2012. We request that campus human resources coordinate their response with the appropriate campus management and submit consolidated feedback. Please provide written comments to Charlene Tsunezumi, Manager, Compensation and Classification, via e-mail to ctsunezumi@calstate.edu.

Next Steps: Campus feedback will be reviewed and revisions will be made, as appropriate, after reviewing with the management advisory group. Salary ranges and impact to employees are subject to collective bargaining and will be addressed after the classification standard is finalized. Campus HR departments will be consulted and updated throughout the process.

Should you have any questions regarding this Technical Letter, please contact Charlene Tsunezumi in Human Resources Management at (562) 951-4344.

EN/ct

Attachment

Draft Classification Standards – Rev. 10/17/11
Payroll Technician Series

<u>Classification Title</u>	<u>Class Code</u>
<i>Payroll Technician Trainee</i>	1099
<i>Payroll Technician I</i>	1100
<i>Payroll Technician II</i>	1101
<i>Payroll Technician III</i>	1102

OVERVIEW

Payroll Technicians are responsible for the processing of payroll and personnel transactions such as time and labor, appointments, changes in status, leaves and separations for CSU employees. Incumbents accurately calculate pay and leave accruals, determine appropriate codes, enter and maintain data integrity in human resources information systems.

Positions are assigned to classifications in this series on the basis of the degree of complexity, difficulty, and variety of duties performed; amount of independence, originality, and discretionary decision-making authority delegated to the position; and demonstrated level of knowledge of payroll/personnel methods, procedures, and practices. All classifications require attention to detail, the ability to accurately perform mathematical calculations, organize a high volume of work effectively and meet strict deadlines; interpret, apply, and determine appropriate action utilizing policies, procedures, programs, guidelines, and applicable state and federal laws, educational codes, and collective bargaining agreements; and use current computer word processing and spreadsheet software programs. Incumbents may be assigned responsibility for providing training, guidance and assistance to other employees and participating in the performance evaluation process.

The Payroll Technician series is distinguished from other series such as general administrative support, accounting, and purchasing by a primary responsibility for providing payroll/personnel support to a campus and require knowledge of applicable payroll policies and procedures.

Payroll Technician Trainee – The trainee classification provides opportunity to participate in a campus training program and acquire the essential knowledge and abilities to perform the duties of a Payroll Technician. The methods of performing work are well established and work is regularly reviewed. Training is typically for a period of 3-6 months. Permanent status cannot be earned in this classification.

Payroll Technician I – Entry level classification in series. Incumbents follow general instructions and well-defined procedures. Work is typically constant, and fairly standardized in nature. Complex transactions are completed on the basis of general instructions.

Payroll Technician II – Journey level classification in the series. Work is accomplished with a greater degree of independence and a thorough knowledge of all types of payroll/personnel transactions for all employee categories. Work assignments require the application of payroll/personnel regulations and precedent decisions to individual situations that are not clearly covered by policies, procedures, programs, guidelines, and applicable state and federal laws, educational codes, and collective bargaining agreements.

Payroll Technician III – Incumbents at the advanced journey level exercise considerable judgment, initiative and independence to achieve results. Work assignments are characterized by the resolution of the most difficult and unusually complicated or problematic payroll and personnel transactions, and deal with subject matter requiring technical expertise. Incumbents usually interact with a variety of contacts, internal and external to the campus.

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Payroll Technicians. They are not meant to be all-inclusive or restrictive. Work assignments may involve other related activities within the scope of each classification.

Payroll Technicians typically perform some or all of the following duties: process and complete payroll/personnel transactions such as appointments, change in status, leaves, and separations; calculate pay based on employee's status; calculate leave accruals; process time reporting records, entitlements, judgments, levies, garnishments and wage withholding orders; review, audit, and reconcile data; maintain files; perform mathematical calculations; determine transaction codes; ensure completion of documents for processing; enter-and maintain data integrity in databases; use current computer word processing and spreadsheet software programs, web browsers, electronic calendaring programs, human resources information systems and records management systems; and may perform routine clerical functions as needed, such as sorting mail, data entry, greeting customers, answering phones and providing assistance, filing and using standard office equipment.

PAYROLL TECHNICIAN TRAINEE

The Payroll Technician Trainee is enrolled in a campus training program for a period of 3-6 months. Through general instructions and well defined procedures, incumbents learn to prepare and process payroll/personnel transactions to acquire the knowledge and abilities necessary to perform the duties of a Payroll Technician.

Incumbents process and complete payroll/personnel transactions, typically for specific actions and particular categories of employees; complex transactions may be handled with specific instructions; conduct ad hoc inquiries to obtain payroll transaction status; and, assist employees with a variety of payroll related forms. They may serve as first point of contact for telephone and walk-in inquiries; and may assist with employment verification inquiries.

TYPICAL QUALIFICATIONS:

Knowledge and Abilities:

Working knowledge of general office methods, practices and procedures.

Ability to acquire working knowledge of CSU, state and governmental guidelines; and understand and apply applicable rules, regulations, policies, and procedures.

Ability to, or acquire the skill to, use human resources information systems, records management systems, electronic calendaring programs, and web browsers.

Ability to use current computer word processing and spreadsheet software programs; perform basic mathematical calculations; accurately enter data; follow oral and written instructions; communicate effectively with others; and read and write English at a level appropriate to the position.

Experience:

Equivalent to one year of general clerical experience OR any equivalent combination of education and experience which provides the required knowledge and abilities.

PAYROLL TECHNICIAN I

The Payroll Technician I apply a general knowledge of payroll/personnel methods, procedures, and practices to perform fairly standardized payroll/personnel transactions for specific actions, categories of employees or campus departments. Assistance and guidelines are readily available and the methods of performing transactions are well established and outlined, or explained in general terms. Incumbents may perform the full range of payroll/personnel transactions with explicit instructions.

The Payroll Technician I provide guidance and assistance on payroll/personnel processing policies and procedures; communicate established policies and procedures to faculty, staff and the general public, deferring to appropriate staff member when more extensive interpretation is required; maintain and monitor employee leave records; run queries; review, audit, reconcile and correct data; compute net pay; process time reporting records, leave accruals, entitlements, judgments, levies, garnishments, and wage withholding orders; enter payroll/personnel transactions into an online system; prepare documents; verify and audit information in preparation for release of payment; respond to payroll requests; and may prepare basic reports and worksheets.

TYPICAL QUALIFICATIONS:

Knowledge:

General knowledge of general office methods, practices and procedures.

Abilities:

Ability to acquire working knowledge of, and independently select and apply, CSU policies, procedures, programs, guidelines and applicable state and federal laws, educational codes, and collective bargaining agreements. Ability to, or acquire the skill to, use human resources information systems, records management systems, electronic calendaring programs, and web browsers.

Ability to audit and reconcile data; interpret and apply written rules and regulations; establish and maintain effective working relationships with others; exercise tact, courtesy and good judgment in responding to others; use current computer word processing and spreadsheet software programs; perform mathematical calculations; accurately enter data; follow oral and written instructions; communicate effectively with others; and read and write English at a level appropriate to the position.

Experience:

Equivalent to one year of human resources information systems experience or knowledge of payroll systems which has provided the above knowledge and abilities; or equivalent to two years of general administrative experience in payroll and human resources recordkeeping and data entry which has provided the above knowledge and abilities.

Education:

Any equivalent combination of education and experience which provides the required knowledge and abilities.

PAYROLL TECHNICIAN II

Incumbents in this classification apply a thorough knowledge of payroll/personnel transactions and perform the full range of moderately complex payroll/personnel transactions with a greater degree of independence for all employee categories; independently select, interpret and apply the proper rules and regulations which may not specifically be covered by precedents or existing CSU, state and governmental guidelines. This is the journey level of this series.

The Payroll Technician II perform diverse duties involving a wide range of procedures and apply various rules, regulations, and policies to determine pay and accruals. Incumbents use initiative and judgment to analyze information and determine a course of action within the specifications of standard practice and established guidelines. Work is usually performed without direct verification or check. Incumbents prepare and review documents for accuracy; calculate, process and reconcile a diverse range of moderately complex payroll/personnel transactions for a variety of pay plans, work schedules, categories of employees, leave statuses, and accruals; verify and audit data prior to release; determine appropriate codes; identify and calculate over-payments; coordinate collection activities; reconcile work schedules; and provide guidance and assistance to campus payroll users.

In addition to activities outlined in Payroll Technician I, incumbents may also perform some or all of the following: work with representatives of other State agencies; provide training to other payroll staff; create queries, validate results and prepare spreadsheets; draft and prepare memos; respond to inquiries relating to payroll/personnel rules, regulations, policies and procedures; prepare reports; participate in the testing of software upgrades and implementations as related to the position; review pay programs and assist with troubleshooting; and may assist management in directing, planning and organizing the work of other payroll staff.

TYPICAL QUALIFICATIONS:

Knowledge:

Thorough knowledge of general office methods, practices and procedures. Thorough knowledge of, or the ability to acquire quickly, policies, procedures, programs, guidelines and applicable state and federal laws, educational codes, and collective bargaining agreements.

Abilities:

Ability to select and apply a wide variety to complex policies, procedures, programs, and applicable state and federal laws, educational codes, and collective bargaining agreements that are not clearly described in available guidelines; organize work, set priorities, and meet critical deadlines; use current computer word processing and spreadsheet software programs, electronic calendaring programs, web browsers, human resources information

systems and records management systems; perform mathematical calculations; interpret and apply written rules and regulations; work independently; make sound decisions and recommendations regarding payroll activities; and read and write English at a level appropriate to the position.

Experience:

Equivalent to two years of payroll and personnel experience which has provided the above knowledge and abilities.

Education:

Any equivalent combination of education and experience which provides the required knowledge and abilities.

PAYROLL TECHNICIAN III

The Payroll Technician III is the advanced journey level classification in this series and serve as the technical expert. Positions in this classification perform a wide variety of duties requiring considerable judgment, initiative and independence, and require a thorough knowledge of payroll/personnel transactions, policies, procedures, and practices. Incumbents independently calculate, process, and reconcile the full range of payroll/personnel transactions, including the unusually difficult and complex transactions, for all pay plans, work schedules, categories of employees, leave statuses, and accruals. Work is characterized by the resolution of the most difficult and unusually complicated or problematic payroll/personnel transactions, having little or no precedent, while consulting a combination of guidelines. Incumbents may provide technical and/or work direction to other payroll staff.

In addition to activities outlined in Payroll Technician I and II, incumbents typically perform some or all of the following: provide guidance and assistance to campus users related to payroll processing, policies, procedures and practices; create, execute, and modify complex queries, validate results, prepare spreadsheets and related reports; present complex concepts and analysis to make recommendations for changes to existing processes and procedures; explain policies, procedures, guidelines, applicable state and federal laws, educational codes, and collective bargaining agreements, including those that require extensive interpretation; write business process guidelines; develop pay programs and troubleshoot automated systems; participate in the testing of software upgrades and implementations as related to the position including such activities as testing transaction/data entry and data output; and may lead day-to-day activities and provide training, guidance and assistance to other payroll staff.

TYPICAL QUALIFICATIONS:

Knowledge:

Thorough knowledge of general office methods, practices and procedures. Thorough knowledge of CSU policies, procedures, programs, guidelines and applicable state and federal laws, educational codes, and collective bargaining agreements.

Abilities:

Ability to select and apply a wide variety of complex policies, procedures, programs, and applicable state and federal laws, educational codes, and collective bargaining agreements that are not clearly described in available guidelines; interpret and apply written rules and regulations; perform advanced mathematical calculations; clearly and concisely explain complex policies, procedures, guidelines, applicable state and federal laws, educational codes, and collective bargaining agreements; coordinate and perform a variety of functions; research, analyze, explore solutions, and present complex concepts and analysis to make recommendations for changes to existing processes and procedures; investigate and resolve errors and discrepancies; troubleshoot automated systems problems; write business process guidelines; establish and maintain effective working relationships with others; exercise tact, courtesy, and good judgment in responding to others; use current computer word processing and spreadsheet software programs, electronic calendaring programs, web browsers, human resources information systems, and records management systems; and read and write English at a level appropriate to the position.

Experience:

Equivalent to three years of payroll and personnel experience which has provided the above knowledge and abilities.

Education:

Any equivalent combination of education and experience which provides the required knowledge and abilities.