

# Classification and Qualification STANDARDS

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## Payroll Technician Series

Class Title	Class Code	Issue Date	FLSA
<i>Payroll Technician I</i>	1100	02-01-2014	<i>Non-Exempt</i>
<i>Payroll Technician II</i>	1101	02-01-2014	<i>Non-Exempt</i>
<i>Payroll Technician III</i>	1102	02-01-2014	<i>Non-Exempt</i>

### OVERVIEW:

Payroll Technicians are responsible for the processing of payroll and personnel transactions such as appointments, changes in status, leaves and separations for CSU employees. Incumbents apply knowledge of ERP/HRIS and data management systems, and consult various resources to access, enter and maintain payroll and personnel data. Incumbents validate data, identify discrepancies and errors, and calculate and reconcile variances to maintain data integrity in 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 and 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, applicable state and federal laws, educational codes, and collective bargaining agreements; establish and maintain effective working relationships with others; exercise tact, courtesy, and good judgment in responding to others; access and navigate Enterprise Resource Planning/Human Resources Information System (ERP/HRIS) and data management systems; and use current computer word processing and spreadsheet software programs, web browsers, and electronic calendaring 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 and personnel support to a campus and require knowledge of applicable payroll and personnel policies and procedures.

***Payroll Technician I*** – Entry level classification in the series. Incumbents follow general instructions and well-defined procedures. Work is typically constant, and fairly standardized in nature. Transactions are completed on the basis of general instructions and work is regularly reviewed by higher level payroll staff. Incumbents do not perform the full range of payroll and personnel transactions but are limited to specific kinds of transactions, categories of CSU employees, or campus departments.

***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 and personnel transactions for all employee categories. Work assignments require the application of payroll and 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. Incumbents perform the typical activities related to the processing of the full range of payroll and personnel transactions such as appointments, changes in status, leaves and separations for all categories of CSU employees.

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***Payroll Technician III*** – Incumbents at the advanced journey level exercise considerable judgment, initiative and independence to achieve results, and deal with subject matter requiring a high degree of technical expertise. Incumbents may function as: (1) a lead worker providing training, guidance and assistance to for a group of Payroll Technicians; (2) the sole provider and coordinator of payroll services for the campus; or (3) an advanced journey or operational resource resolving the most difficult and unusually complicated or problematic payroll and personnel related transactions, in a highly independent manner.

## **TYPICAL ACTIVITIES:**

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 the classification.

Payroll Technicians typically perform some or all of the following duties: process and complete payroll and 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 appropriate codes and execute transactions utilizing policies, procedures, guidelines, programs and requirements from various sources; ensure completion of documents for processing; identify and calculate overpayments; coordinate collection activities; respond to unemployment insurance claims and employment verifications; enter and maintain data integrity; use current computer word processing and spreadsheet software programs, web browsers, electronic calendaring programs, ERP/HRIS, and data management systems.

## **PAYROLL TECHNICIAN I**

Under immediate supervision, the Payroll Technician I applies a general knowledge of payroll and personnel methods, procedures, and practices to perform fairly standardized payroll and 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 provide information on payroll and personnel, and provide guidance and assistance on processing fairly routine matters, such as answering questions on the basis of clearly applicable rules and regulations. Incumbents also 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 and personnel transactions; prepare documents; verify and audit information in preparation for release of payment; respond to payroll requests; and may prepare basic reports and worksheets.

## **MINIMUM QUALIFICATIONS:**

### ***Knowledge:***

Working 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, applicable state and federal laws, educational codes, and collective bargaining agreements.

Ability to, or acquire the skill to, use web browsers, electronic calendaring programs, ERP/HRIS, and data management systems.

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 at a level appropriate to the position.

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***Experience:***

Equivalent to one year 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**

Under general supervision, the Payroll Technician II applies a thorough knowledge of payroll and personnel transactions and performs the full range of moderately complex payroll and personnel transactions with a greater degree of independence for all employee categories. Incumbents 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 and 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 and check.

The Payroll Technician II performs diverse duties involving a wide range of procedures and applies various rules, regulations, and policies to determine pay and accruals. Incumbents prepare and review documents for accuracy; verify and audit data prior to release; determine appropriate codes; identify and calculate over-payments; coordinate collection activities; reconcile work schedules; provide guidance and assistance to campus payroll users; calculate, process and reconcile a diverse range of moderately complex payroll and personnel transactions for all categories or combinations of categories of CSU employees (staff, faculty, graduate assistants, student assistants, special consultants, individual lessons, and summer session instructors). These transactions include: pay (intermittent, regular full and part time, overtime, special consultant, shift differential, call back, individual lesson, annual year, 10-month, 10/12, quarterly, semester, summer session, extended vacation and MSAs); leave status and accruals (vacation, holiday, sick, jury duty, bereavement, LWOP, AWOL, military, NDIL, IDL and compensatory time); and, changes in pay status (appointments, end of probationary periods, promotions, demotions, reclassifications, retirements and separations).

Incumbents may also work with representatives of other State agencies and third party administrators; provide training to other payroll staff; run queries, validate results and prepare spreadsheets; draft and prepare memos; respond to inquiries relating to payroll and personnel rules, regulations, policies and procedures; prepare reports; and participate in the testing of payroll software upgrades and implementations as related to the position.

**MINIMUM QUALIFICATIONS:*****Knowledge:***

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

***Abilities:***

In addition to the Payroll Technician I abilities, must be able to: select and apply a wide variety of moderately 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; establish and maintain effective working relationships with others; perform mathematical calculations; work independently; make sound decisions and recommendations regarding payroll activities; use current computer word processing and spreadsheet software programs, web browsers, electronic calendaring programs, ERP/HRIS, and data management systems; and read and write 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.

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### **PAYROLL TECHNICIAN III**

Under broad supervision, the Payroll Technician III serves as the technical expert for the more difficult payroll and personnel areas involving the complete review of facts, for such areas as leaves of absence, final settlement payments, dockings, workers compensation and leave accrual rates. Positions in this classification perform a wide variety of duties requiring considerable judgment, initiative and independence, and require a comprehensive knowledge of payroll and personnel transactions, policies, procedures, and practices. Work is characterized by the resolution of the most difficult and unusually complicated or problematic payroll and personnel transactions, having little or no precedent, while consulting a combination of resources to determine decisions.

Incumbents independently calculate, process, and reconcile the full range of payroll and personnel transactions, including the unusually difficult and complex transactions, for all pay plans, work schedules, categories of employees, leave statuses, and accruals; trace and correct payroll documents by searching records, contacting employees and representatives of the State Controller's Office; research, analyze, and resolve unusually complicated problems involving areas such as faculty leave, tax-sheltered annuities, workers compensation, industrial and non-industrial disability leave programs. Incumbents usually interact with a variety of contacts, internal and external to the campus, and may provide training, guidance and/or work direction to other payroll staff.

Incumbents may also provide guidance and assistance to campus users related to payroll processing, policies, procedures and practices; create, run, and modify queries, validate results, prepare spreadsheets and related reports; 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; troubleshoot automated systems; participate in the testing of payroll 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.

#### **MINIMUM QUALIFICATIONS:**

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

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

##### ***Abilities:***

In addition to the Payroll Technician II abilities, must be able to: 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; use current computer word processing and spreadsheet software programs, web browsers, electronic calendaring programs, ERP/HRIS, and data management systems; and read and write 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.