



POSITION SUMMARY

TITLE: Payroll Specialist Level I
DEPARTMENT: Payroll
REPORTS TO: Payroll Manager
FLSA: Non-exempt

Position Summary

Accountable and responsible for quality service for clients. Contacts and assists clients in process of obtaining information for payroll production and tax related issues; verifies totals, responds to/resolves client questions and problems and delivers quality customer service.

Scorecard

- Achieves goals and milestones on position's Scorecard.

Competencies

- Demonstrates 90% and above abilities on Core Competencies for position.

Essential Duties and Responsibilities

- Perform payroll functions, payroll tax pay and payroll tax recording functions using the various software the company uses.
- Compile payroll data such as garnishments, vacation time, insurance and 401(k) deductions.
- Accept and review electronic time clock data and review the downloaded information for completeness and accuracy either by self or with client.
- Contact various clients for any missing information.
- Process input of payroll data to payroll system.
- Pull payroll management reports from payroll software system.
- Accurately keys all payroll related data necessary to process and meet appointment schedules.
- Maintains a high rate of client retention through quality service.
- Maintains client files.
- Researches and resolves client/system problems.
- Establishes and maintains a positive working relationship with clients, agencies and coworkers to promote a quality service image.
- Communicates information and policies and procedures to clients
- Maintains Priorities List Daily and Ongoing
- Communicates work status, issues and exceptions to supervisor
- Understands and uses Client Risk Factor Assessment - MASTER.xlsx



- More specific Job Duties are outlined in the Position Details, although, these details may change from time to time based on staffing, vacations, new policies and procedures. This document is titled “PDC – Payroll Specialist Level I - Position Details and Checklists – Pink Payroll.xls” and is required to be completed.
- Performs other work-related duties as assigned.

Other Duties include:

- Process existing client payrolls efficiently and accurately on a daily basis
- Process existing client data changes
- Interact with clients and gather information as needed
- Assist customers with inquiries and problem resolution
- Respond to client questions via phone and email
- Handle and distribute confidential information
- Planning and completing work tasks in manner that avoids last minute issues
- Administrative tasks and other duties as assigned
- Set up new clients on our software, complete all lists and compliance tasks
- Call potential clients to inform them of our service and request an appointment

Skills and habits needed include:

- Ability to learn quickly
- Communicates well other staff members
- Problem solving and critical thinking
- Basic math and data entry
- Prioritize multiple tasks
- Detail oriented
- Ability to use basic office equipment and computer programs
- Work in a time critical environment under strict deadlines
- Work assigned work hours without excessive absences, especially during critical peak workload periods
- Professional phone, email, and in-person etiquette with clients
- Work well as a member of a team
- Positive attitude with clients and team members
- Willingness to accept ongoing training in a fast paced environment

Minimum Qualifications (Education, Experience, Skills)

- High School Diploma (Associates preferred) and four or more years of office-related experience and/or training.
- Solid understanding of payroll and payroll tax laws, and commitment to increase knowledge base
- Proven facility in MS Office, data entry and office equipment (i.e. telephone, head set, 10-key or calculator, PC, FAX machine, photo copier)
- Proven facility in customer service, and problem resolution.
- Equivalent combination of education and experience is acceptable.
- Excellent written and oral communication skills.
- Excellent organizational, planning, and prioritization skills.
- Excellent interpersonal skills.

Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions.



While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or finger, handle, or feel objects, tools or controls. The employee is occasionally required to stand; walk; sit; reach with hands and arms; climb or balance; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, color vision, peripheral vision, and the ability to adjust focus.

The noise level in the work environment is usually moderate.

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments.

All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills aptitudes and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills or abilities.

This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

Reviewed with employee by:

Manager's Name

Date

Received and accepted by:

Employee's Name

Date