

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT
Position Description

TITLE:	Payroll Retirement Analyst	CLASSIFICATION:	Classified Confidential
SERIES:	None	FLSA:	Exempt
JOB CLASS CODE:	9898	WORK YEAR:	12 Months
DEPARTMENT:	Employee Compensation	SALARY:	Range 63 Salary Schedule F
REPORTS TO:	Assigned Supervisor	BOARD APPROVAL:	9-5-2024
		HR APPROVAL:	8/26/2024, 6-1-10
		CABINET APPROVAL:	8/5/2024

BASIC FUNCTION:

Directly support the confidential activities of the payroll unit involving processing district's retirement programs, and other related responsibilities as assigned. Under the general direction of the assigned supervisor, performs a variety of specialized and complex payroll duties in the review, auditing and processing of confidential payroll records, benefits, and retirement contributions for district employees. Serve as a confidential technical resource concerning assigned payroll functions and related retirement and benefits accounts and information. Prepare, maintain and audit a variety of financial and statistical payroll, benefits, and retirement data, records, statements and reports. Works independently on special retirement projects, confidential personnel projects, and provides input concerning department needs and the development and implementation of policies and procedures.

DISTINGUISHING CHARACTERISTICS:

The Payroll Retirement Analyst's knowledge and capabilities encompass payroll and personnel, as well as an understanding of the systems on which these functions run. The Payroll Retirement Analyst has specialized knowledge in the areas of retirement plans related to CalSTRS and CalPERS.

The Payroll Retirement Analyst may perform in a team or project leader capacity on special projects assigned by the management. In this mode, the Payroll Retirement Analyst acts as a technical resource, and provides guidance to Fiscal Services Technicians and Lead Payroll Technicians; acts as a secondary technical resource to Fiscal Services Technicians.

REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below [E]. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principle job elements.)

Perform advanced payroll duties; balance and correct monthly retirement reports; assist in the distribution, coordination, and completion of retirement assignments; perform, analyze, and explain complex retirement transactions; acts as a resource to Fiscal Services Technicians; train and provide work direction to others; train and advise district staff on payroll procedures and processes. Perform thorough routine audits of payroll and retirement records to maintain accuracy and compliance. **E**

Support the distribution and coordination of payroll tasks; compile payroll reports, compile confidential personnel records, rectify retirement reporting errors, process grievances related to retirement, and maintain accurate payroll data essential for timely payroll preparation under strict deadlines;

Support senior management with confidential projects and initiatives. **E**

Reconcile and analyze payroll information related to retirement; check and correct monthly error reports generated from multiple payrolls; balance and resolve the more complex discrepancies in payrolls. **E**

Maintain records, and process all changes regarding employee retirement programs; closely monitor documents received from other departments; correctly interpret personnel information. **E**

Audit time sheets received from all district locations, make necessary information readily available, and correct when necessary. **E**

Prepare monthly electronic retirement reports for Sacramento County Office of Education under stringent time limits; research and enter corrections online for information received from retirement agencies and Sacramento County Office of Education. **E**

Prepare forms for service retirement verifying sick leave credits; prepare separation and advance information forms for disability retirement; research and prepare service credit for prior service forms. **E**

Prepare forms for former employees who have terminated, as well as miscellaneous forms sent by retirement agencies. **E**

Perform, analyze, and explain complex financial transactions and difficult mathematical work; perform complex, detailed, and accurate computer functions using the district's payroll/finance system, confidential personnel records; operate and understand system functions related to assigned duties. **E**

Interpret confidential union contracts within bargaining units, Memorandum of Understanding related to labor relation resolution, policies, and procedures related to payroll, retirement, and the application of sick leave. **E**

Prepare, audit, analyze, update, and adjust monthly retirement reports, including PERS information, with strict confidentiality. Ensure accurate completion of tax, STRS retirement plans, and other reports within specified deadlines. Review reports meticulously to verify accuracy before submission to the appropriate agencies or personnel within established timelines.

Test and recommend revisions of district software and procedures necessary to produce and account for district payrolls; learn and utilize computer database programs and other programs to produce reports and analyze data. **E**

Provide detailed and technical information and written reports concerning district policies, procedures, and established guidelines including confidential or sensitive issues; provide payroll training to sites and departments. **E**

Attend retirement agency workshops; maintain comprehensive records; prepare written reports; attend meetings; prepare and transmit information related to payroll and retirement. **E**

Work with school improvement initiatives that close student achievement gaps between racial, ethnic, and economic groups by working with all of the diverse communities. **E**

Responsible for participating in audits conducted by CalSTRS and CalPERS and ensure adherence to regulatory requirements, meticulous examination of financial records, and verification of the proper management of retirement funds.

Perform related duties as assigned.

TRAINING, EDUCATION, AND EXPERIENCE:

Any combination equivalent to: associate's degree in related field supplemented by course work in business, finance, or a similar area, and four years of experience in payroll in a medium to large organization, preferably a California School District or County Office of Education.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license; provide personal automobile and proof of insurance. Overall scores in computer software QWIZ testing program preferred as follows:

- Keyboarding.....55 Correct WPM
- Word.....80% Overall Score

Excel or Access80% Overall Score
 Payroll80% Overall Score

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Methods and practices of payroll, retirement, and workers' compensation financial record keeping.
- Rules, regulations, laws, and policies governing payroll processing, preferably including California school districts.
- Methods and processes of statistical analysis and data reporting.
- Principles of providing training and work direction to others.
- Current business office procedures and equipment including 10-key and computer skills.
- Report writing methods and techniques.
- Applicable sections of State Education Code and other state and federal laws.
- Bargaining unit contracts, policies, and procedures.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- Effective oral and written communication skills.
- Interpersonal skills using tact, patience, and courtesy.
- Operations, procedures, specific rules, and precedents of payroll, retirement, and workers' compensation processes and practices.
- Operation of a computer, related software, and standard office equipment.

ABILITY TO:

- Perform advanced payroll, retirement, workers' compensation, and financial analysis and record-keeping work.
- Independently analyze and learn complex state and district laws, regulations, rules, and policies.
- Maintain records and prepare, balance, and correct monthly reports.
- Assist in the distribution, coordination, and completion of retirement assignments.
- Perform, analyze, and explain complex payroll, retirement, and workers' compensation transactions.
- Train and provide work direction to others.
- Perform computational tasks with speed and accuracy.
- Work with computer systems and networks to perform a variety of specialized technical duties.
- Learn, understand, and use database management programs.
- Work with school improvement initiatives that close student achievement gaps between racial, ethnic, and economic groups by working with all of the diverse communities.
- Operate a computer, related software, and standard office equipment.
- Complete work with many interruptions; meet schedules and timelines.
- Understand and work within scope of authority.
- Work confidentially with discretion.
- Analyze situations, and adopt an effective course of action.
- Establish and maintain effective working relationships with school officials, administrators, and employees.
- Communicate effectively both orally and in writing.
- Meet state and district standards of professional conduct as outlined in Board Policy.

WORKING CONDITIONS:

SAMPLE ENVIRONMENT:

Office environment; fast paced work with fixed deadlines; constant interruptions.

SAMPLE PHYSICAL ABILITIES:

Hear and speak to make presentations, and exchange information in person and on the telephone; dexterity of hands and fingers to operate a computer keyboard and 10-key calculator; see to read, prepare documents and reports, and view a computer monitor; sit or stand for extended periods of time; bend at the waist, reach overhead, above the shoulders, and horizontally to retrieve and store files; physical, mental and emotional stamina to endure long hours under sometimes stressful conditions; lift light objects.

SAMPLE HAZARDS:

Occasional contact with dissatisfied or abusive individuals.

(Former Classification: Payroll Benefits Specialist)

NOTE: This job class has been designated "Confidential" by the Board of Education in accordance with the Rodda Act.