

**Position Title:** Payroll Staff

**Supervisor:** Payroll Supervisor

**Primary Assignment:** Payroll Duties

**Secondary Assignment:** Write-Up and Employee Benefits

**Position Purpose**

Fulfill the corporate mission and vision by performing Payroll Staff duties in accordance with Firm values.

**Performance Expectations**

The Payroll Staff is expected to:

- A. Payroll Processing
- B. Quarterly and annual payroll filings
- C. Handle audits and census filing
- D. Handle client requests

**Duties**

The Payroll Staff position purpose will be achieved by effectively demonstrating:

- A. Performance of payroll duties accurately and on-time.
  - 1. Receive and/or request time sheets according to specified intervals.
  - 2. Process time sheet data in a timely matter that ensures payroll is delivered by the specified date and time.
  - 3. Produce printed checks, images of printed checks and/or make direct deposits.
  - 4. Produce check reports, check status reports and/or journal entry reports.
  - 5. Process client payroll taxes each pay period, monthly, quarterly and/or annually to comply with Federal and State regulations.
  - 6. Produce client payroll tax forms (941, W-2's, etc.) at appropriate times throughout the year to comply with Federal and State regulations.
  - 7. Create and maintain an Excel workbook to log activity completed on behalf of payroll accounts.
  - 8. Set up new business accounts in firm computer system by receiving and/or gathering required information related to deductions, insurance, pension, garnishments, pay rates, etc.
  - 9. File forms to ensure new business accounts comply with State and Federal requirements.
  - 10. Set up new business accounts so electronic fund transfers process smoothly.
  - 11. Assist with client telephone calls.
  
- B. Proactive engagement in ongoing professional development.
  - 1. Remain updated regarding technology advances, general economic trends, political developments and legislation that could affect the business climate.
  - 2. Maintain expert knowledge, skills, and abilities in core areas by seeking out and participating in continuing education courses, seminars, and other learning opportunities.
  - 3. Review appraisal findings and collaboratively create professional development plans with the Department Manager.
  - 4. Execute professional development plans.

5. Participate in selected and designated training opportunities to ensure proficient knowledge, skills, and abilities in the areas of business services.
- C. Client relationship building initiative.
1. Identify, develop and systematically implement agreed upon services that enable the firm to remain on the forefront of customer service delivery.
  2. Collaborate with other department personnel by communicating effectively, offering expertise when requested and requesting professional input from other content experts as required.
  3. Remain current on “other” internal and external services offered by the firm to help clients achieve specific goals or satisfy particular needs.
  4. Implement firm procedures for identifying client opportunities and recommending “other” services.
- D. Active engagement in continuous department improvement planning and execution.
1. Initiate identification and communication of issues to keep management aware of opportunities for department and/or organizational improvement.
  2. Participate in department action planning with other personnel as directed by the Operations Manager.
  3. Execute continuous department improvement plans with fidelity.
  4. Continuously monitor annual action plan execution and report progress to the Operations Manager.
  5. Actively evaluate department plans with the Operations Manager and adapt plans flexibly through daily practice and periodic meetings or work sessions.
- E. Compliance with all handbook policies and operational procedures.
- F. Completion of other projects and duties assigned by the Payroll Supervisor and/or Operations Manager.

### **Position Qualifications**

- A. Education and Experience
1. Experience in accounting with a career history of accurately completing work and other assignments in a timely manner.
  2. Must possess a current and valid Preparer Tax Identification Number (PTIN) with the Internal Revenue Service.
- B. Knowledge, Skills and Abilities
1. Customer Service. Demonstrated use of principles and processes for providing outstanding customer service. This includes customer needs assessment, meeting quality standards for services and evaluation of customer satisfaction.

2. Judgment and Decision Making. Demonstrated ability to systematically consider relative costs and benefits of potential actions; critically analyze related variables; and logically apply reasoning when selecting goals and making plans.
3. Communication. Demonstrated use of communication to understand and correctly interpret information and ideas presented through non-verbal, verbal and written modes as well as to convey information and ideas professionally to individuals and groups through presentation of words, actions, and documentation.
4. Technology. Demonstrated use of computers, Microsoft Office Suite software, internet and other electronic means to gather and disseminate information; communicate with colleagues and customers; construct and revise Word and Excel documents; and store and retrieve data.
5. Economics and Accounting. Demonstrated use of economic and accounting principles/practices, financial analysis and succinct reporting of financial data.
6. Attendance. Demonstrated ability to consistently arrive to work on time and remain focused on task throughout the day without allowing distractions to interfere with completion of work.