

## Template:

Job Scorecard: [Position Title]

Position Information			
Name		Department	
Reports to		Manager	
Executive		Updated Date	

### Objective Statement

### Key Responsibilities

### Requirements

### Skills & Core Competencies

### Specific Measures of Success/Key Outcomes

### Compensation & Benefits

### Who We Are

## Good Example:

### Job Scorecard: Payroll Services Coordinator

Position Information			
<b>Name</b>	Payroll Services Coordinator	<b>Department</b>	Payroll Operations
<b>Reports to</b>	Service Team Manager	<b>Manager</b>	Aulani ProService
<b>Executive</b>	Chief Operating Officer	<b>Updated Date</b>	1/14/2022

#### Objective Statement

##### Payroll Services Coordinator

You will build and maintain relationships with a range of client contacts ranging from Chief Executives to small business owners and front line managers. You will process payroll accurately and on-time every pay period. Some of your payrolls will be very complex and large. You will consult with your clients and identify, own, and solve any problems that may arise. In this role, you will serve as a key member within one of our dedicated HR Services teams that is empowered to deliver expert local service to a large portion of the team's assigned client partners, ensuring overall client satisfaction.

#### Key Responsibilities

- Provide consultative support to an assigned book of clients (generally clients with less than 35 employees, some with complexities including certified payroll, union wages and garnishments, restaurant/tips, owner controlled insurance program) by demonstrating subject matter expertise on a variety of payroll foundation concepts in supporting client inquiries pertaining to payroll administration.
- Manage an email inbox and phone queue, meeting all service level standards
- Partner with internal resources and subject matter experts including Client HR, Client Success, Safety, and Benefits to achieve win-win solutions for your clients.
- Administer payroll for the same book of clients with varying pay schedules and types.
- Collect timesheets, audit for compliance and accurate billing, processing earnings, deductions, status changes, generating client reports, and posting of payroll and direct deposits

#### Requirements

##### Minimum Qualifications:

- 5+ years of customer service experience
- FPC or CPP certification, or willingness to study & become certified
- Team Player. Demonstrated success reaching out to peers to tear down walls or remove roadblocks on behalf of your clients

##### Preferred Qualifications:

- Prior payroll experience

## Skills & Core Competencies

- Judgment/Decision Making. Demonstrate consistent logic, rationality, and objectivity in decision-making. Achieve balance between quick decisiveness and more measured approaches.
- Customer Focus. Exceed internal and external customer needs in ways that provide satisfaction and excellent results for our clients. Demonstrate empathy while establishing trusted partner relationships with internal and external contacts. Regarded as visible and accessible.
- Pragmatism. Generate sensible, realistic, practical solutions to problems.
- Analysis Skills. Able to identify significant problems and opportunities. Analyze problems in depth. Relate and compare data from different sources. Able to determine root causes and subtle relationships among data from various sources. Exhibits a probing mind. Achieves penetrating insights.
- Conceptual Ability. Ability to deal effectively not just with concrete, tangible issues, but also with abstract, conceptual matters.
- Communication. Able to articulately communicate complex payroll related concepts and issues in verbal and written formats.

## Specific Measures of Success/Key Outcomes

- Clients payrolls paid accurately and on-time, every pay period
- Client Satisfaction Survey results = 9+ (1-10 point scale, 10 highest)

## Compensation & Benefits

- Paid Parental Leave
- Student Loan Repayment Assistance
- 401k Company Match
- Generous paid time off including 7 observed holidays, floating holidays, and paid volunteer time.
- Company contribution towards individual healthcare plans (medical, drug, vision, and dental)
- Flexible Spending, Life, and Accident insurance programs

## Who We Are

At ProService Hawaii, our mission is to empower local employers to succeed. We do this by helping them care for their people in ways that simplify their work, save them time & money and keep them ahead. As Hawaii's HR partner for over 25 years, our employees based on Oahu, Maui, Hawaii and Kauai help our clients hire & onboard the right new hires faster, retain their stars and help them shine, run payroll & hr efficiently, contain their labor costs every year and solve any problem. Part of our culture here at ProService is to attract and retain the best to be the best. You will join our #Prohana, in whom we invest heavily in training and career development. We are proud to offer competitive compensation and a total rewards program that rewards high performance.

## Actual Poor Example #1

Bring your payroll and benefits experience to work for Company ABC!

Company ABC is committed to building a workforce reflective of our community and establishing a lasting culture of equity and belonging within our organization. Our collective talents and expertise contribute to high-quality companies that support a vibrant, resilient, inclusive community. We celebrate a diverse workforce and welcome all qualified candidates to apply.

### **The Position**

Payroll Specialists perform a variety of highly specialized and complex technical and clerical accounting work related to the preparation and maintenance of an automated payroll system, including preparation and processing of the biweekly payroll and related disbursements and similar activities in the Payroll and Benefits Division of the Finance Department.

This is a full journey-level position with direct responsibility for the full-cycle payroll process, generation of paychecks and all related tasks, including special check runs, error monitoring and resolution, reporting, and reconciliation of related accounts. Individuals in this position are required to have a working knowledge of payroll and accounting practices and procedures involving multiple variables, complex accounting activities related to benefits, retirements programs, multiple Memoranda of Understanding (MOUs), special pays, complex retirement formulas and calculations, state and federal tax laws and regulations, and a wide variety of routine and non-routine personnel transactions.

### **Ideal Candidate**

The ideal candidate possesses a minimum of one (1) year of full cycle payroll processing experience with an organization with labor unions and labor contracts using an ERP or HRIS system, a strong team orientation and an understanding of the complexity of processing payroll for a government agency. The ideal candidate will also have experience reconciling payroll clearing accounts; organizing and prioritizing a high volume of work under firm deadlines; understanding, interpreting and applying oral and written instructions, policies and procedures related to processing payroll; performing detailed numerical work with speed and accuracy; establishing and maintaining effective working relationships; and providing excellent customer service to those contacted in the course of the work. Certification from the American Payroll Association is highly desirable.

### **Examples of Duties and Responsibilities**

- Prepares and processes the full cycle bi-weekly payroll
- Sets up and maintains employee master file records in the payroll system
- Reviews personnel action forms (PAFs) and other employee deduction and contribution forms for completeness and accuracy and makes necessary entries into the payroll system
- Reviews time and attendance records for accuracy and compliance with various MOUs and City policies
- Reviews system-generated FLSA overtime payments, various payroll deductions and fringe benefit calculations and makes necessary adjustments
- Performs complex retroactive pay calculations and applies adjustments
- Runs trial payroll and reviews for accuracy; makes corrections as needed
- Analyzes various payroll reports for error and out-of-balance messages and reconciles any discrepancies
- Generates paychecks and direct deposits

- Calculates separation payouts, including lump sum leave payouts and contributions to deferred compensation plans
- Prepares spreadsheets to record and track disbursements
- Creates accounts payable claims for payment of payroll liabilities and reconciles payroll clearing accounts
- Tracks accrued payroll tax liability, monitors deadlines and prepares tax deposits
- Assists employees with various questions and requests for information
- Receives and researches requirements for wage assignment orders and tax levies and implements related deductions
- Interprets and applies MOU provisions and City policies and procedures
- Receives and completes various forms, surveys and verifications of employment
- Assists in the preparation and reconciliation of annual W-2 forms
- Establishes and maintains effective communication and working relationships with managers, supervisors, employees, retirees and all external customers
- Maintains a variety of payroll records and assists with gathering information requested by auditors or in response to Public Records Act requests

**Additional Duties:**

- Receives and reconciles monthly insurance invoices and prepares accounts payable claims for payment
- Issues a variety of uniform benefits in accordance with MOUs and City policy and procedures
- Tracks employee leaves related to FMLA, CFRA, PDL and Military
- Notices employees on unpaid leave of amounts due for insurance benefits
- Prepares journal vouchers
- Perform related duties as assigned

**Required Qualifications**

**QUALIFICATIONS:**

Knowledge of: The principles, procedures and practices related to financial record keeping and reporting; basic bookkeeping methods and practices; business math, including fractions, decimals, percentages, and ratios; principles, best practices and methods for the preparation and maintenance of a complex automated payroll system, including preparation and processing of a biweekly payroll and related disbursements; accounting, reporting, recordkeeping, reconciliation and regulatory compliance; federal and State laws related to payroll and tax accounting; Fair Labor Standards Act regulations and requirements; techniques for providing effective customer service in dealing with clients, community and others contacted in the course of the work; and proper business English usage, spelling, grammar, and punctuation.

Ability to: Rapidly learn and conduct full-cycle payroll processing, calculate retroactive pay adjustments and other calculations required for complex payroll processing; understand, interpret, and apply the provisions of MOUs, legal documents and tax requirements; advise others on how to apply policies, procedures and standards to specific situations related to payroll policies; exercise judgment to analyze and categorize data and information in order to determine the relationship of the data with reference to established criteria/standards; compare, count, differentiate, measure and/or sort, as well as assemble, copy, record and transcribe data and information; classify, compute and tabulate data; research and solve complex payroll issues; accurately perform basic to complex arithmetic computations manually; calculate percentages, fractions, decimals and ratios; interpret basic descriptive statistical reports and/or formulation data; work

independently with minimal supervision; organize and prioritize work activities independently; communicate effectively, orally and in writing with employees and representatives of other entities such as CalPERS and State and federal tax agencies; establish effective working relationships with others; and use a computer and related software to input, query and maintain data.

Experience and Education: Any combination equivalent to experience and education that could likely provide the required knowledge and abilities would be qualifying. A typical way to obtain the knowledge and abilities would be: Experience - Sufficient experience including bookkeeping, payroll or financial record keeping or other clerical accounting experience which demonstrates the possession of the knowledge and abilities listed above. Typically, this would include the equivalent of three (3) years of full time experience working in a full cycle payroll environment at an organization of similar size and complexity to our company. Education -Equivalent to completion of the twelfth grade, supplemented with courses in accounting, business, or a related field. One year of college level coursework in accounting or financial record keeping and American Payroll Certification is highly desirable.

**What's wrong with Example #1?** There is nothing incorrect in this job description. However, it is too long to read, includes too many technical terms that are better discussed during the interview, and may turn-off people who might have an interest in the job. Despite the length of this job description, the candidate also learns very little about the company and why they might want to work there. In fact, what little is written about the company is very general, and does not include any compelling specifics that might appeal to a candidate's "reason(s) to buy." Additionally, the skills and experiences in this job description are overly intimidating. The repetition does not assure the candidate the employer is organized

## Actual Poor Example #2

### **Position:** Payroll Specialist

Responsible for assisting in the preparation, distribution, and accounting of employee payroll.

Serves as a liaison to employees and third party payroll vendors to ensure payroll processing accurately reflects company specific pay policies. Audits employee pay records and reconciles totals by departmental cost center, location, etc. Participates in payroll system upgrades and implementations. Works directly with employees to resolve outstanding payroll inquiries. Ensures FLSA status is correctly captured in the system per employee. Interprets pay policies, e.g. vacation, LOA, disability, workers compensation, governmental regulations, withholding exemptions, etc. and ensures amounts/deductions are calculated and applied to various accounts correctly. Ensures company compliance with federal and state payroll standards. In house payroll expert, staying current with changes in the law. May assist with audits such as internal, state, federal, etc. for correctly classifying and paying employees. May prepare tax reports and related documentation. Documents payroll processes and procedures. May train other payroll staff. May be back up to those who perform specialized tasks or activities.

Duties and tasks are standard with some variation. Completes its own role largely independently within defined policies and procedures.

**What's wrong with Example #2?** There is nothing incorrect in this job description. However, it is too short to give the candidate a reasonable expectation of what they will do. Additionally, this company provides the candidate no sense of what the company does or why they might want to work for the company. Furthermore, the lack of any required skills and competencies is inviting wholly unqualified applicants to apply.