

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

PAYROLL AND BENEFITS SPECIALIST
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under Wisconsin Administrative Code ER 2.04 for making classification decisions relative to present and future positions which perform payroll and benefits functions in state agencies. Duties performed range from routine to extremely complex. This classification specification is not intended to identify every duty which may be assigned to positions but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the classification concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses positions which perform a wide range of payroll and benefits-related functions for a majority of the time. Positions perform the full range of routine to extremely complex payroll and benefits duties; provide guidance and counsel employees on pay and benefit topics related to payroll and benefits programs; prepare, reconcile and approve various payroll and benefits reports; and/or audit, verify, and process payroll information. These duties are performed on behalf of management and provide the employee with access to information affecting the employer/employee relationship. Positions allocated to this classification meet the statutory definition of confidential, as defined in s. 111.81(7), Wis. Stats.

C. Exclusions

Excluded from this classification series are the following types of positions:

1. Positions which do not meet the statutory definition of confidential, as defined in s. 111.81(7), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which meet the statutory definitions of supervisor or management, as defined in s. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.

3. Positions which perform payroll administration activities in the Central Payroll Section of the Department of Administration for a majority of the time and are more appropriately classified as Executive Payroll Coordinator.
4. Positions which perform payroll systems coordination work for a majority of the time and are more appropriately classified as Central Payroll Systems Coordinator or Payroll and Benefits Systems Coordinator and Payroll and Benefits Systems Coordinator Senior.
5. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Classification Series

Employees enter positions within this classification series through competition. Each level within this series may be an objective level. Reclassification to the advanced level will be permitted only when it can be demonstrated that the change in duties and responsibilities justifying the reclass are a logical and gradual outgrowth of the position's previous duties and responsibilities. Positions with leadworker duties will be filled by competition.

II. DEFINITIONS

TERMINOLGY:

Satellite Office: Payroll and benefits administration offices at UW Service Center (UWSC), College, Department level, or located outside the central payroll office of a state agency such as institutions, district offices, regional offices or equivalent organizational sub-units.

Complex Satellite Office: A satellite office with delegated authority from the central payroll office of a major state agency, the UWSC campus central payroll office or College Dean level payroll office (e.g. College of Letters & Science Dean's Office, Department of Chemistry) that meet three or more of the following criteria: (1) significant organizational diversity in terms of the number and variety of classifications used and/or employment types; (2) multiple work shifts; (3) multiple geographic locations; (4) large number of appropriations with complex funding requirements and structure with significant impact on the budget process; (5) non-standard benefits plan administration; (6) application of international tax laws and treaties; (7) application of visa requirements; (8) comprehensive benefits counseling performed; (9) tuition remission; or (10) requires significant and complicated Worker's Compensation, Unemployment Compensation, or 230.36 activities.

Along with the complexity of the duties as defined above the number of employees served by the satellite office may be a factor in determining complexity.

Complex Agency: A state agency that meets three or more of the following criteria: (1) requires non-standard tax reporting (e.g., international tax implications); (2) non-standard benefits plan administration (e.g., educational institution tax sheltered annuity programs); (3) University benefit plans (e.g., Tax Shelter Annuities, major medical, various life insurance plans and Graduate Assistant health plans), (4) non-standard benefits reporting; (5) contains large number of agency appropriations; (6) uses unique agency specific payroll subsystem(s); (7) uses extensive numbers of special employment types (e.g., board or commission members, national guard, youth camps, conservation corps, foster parents., etc.) or extensive numbers of seasonal limited term employees; (8) requires significant and complicated Worker's Compensation, Unemployment Compensation or 230.36 activities; or (9) contain significant organizational diversity in terms of

the number and variety of classification series used, multiple work shifts, multiple geographic locations, and seven-day-a-week, twenty-four hour per day operations.

Central Payroll & Benefits Office: Payroll and benefits administration offices that perform the centralized payroll and benefits function for an entire state agency or an entire campus.

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This level is either an entry level or an objective level for positions performing the full range of routine to complex confidential payroll and benefits specialist work or for positions that specialize in a specific functional area of payroll.

Positions may be organizationally located in a division, district, campus, region, or an equivalent organizational sub-unit in the agency's central payroll and benefits office.

Entry level positions operate under close progressing to limited supervision and are assigned a variety of tasks that are progressively more difficult and complex and which are intended to develop the necessary knowledge, skills, and abilities to progress to the higher level.

This is objective level work for payroll and benefits specialists working in satellite offices that do not operate under delegation from a central office, or in a DOC Institution that does not meet the definition of medium (200 to 599 FTE) or large (\geq 600 FTE). Positions in this classification perform progressively more difficult and complex work and are assigned a variety of tasks that are intended to develop the necessary knowledge, skills and abilities needed to perform the full range of payroll and benefits specialist work that is limited in scope and complexity by virtue of the fact that positions refer the more complex questions and issues to a higher level payroll and benefits specialist and/or to the agency central payroll office.

Responsibilities include but are not limited to orientation presentations for new employees, consultation and education of existing employees regarding provisions on payroll and/or benefit programs, interpret and reconcile payroll and benefits related forms and reports, and calculate and complete complicated payroll adjustments. Positions enter, review and/or audit time and attendance information in accordance with FLSA regulations, the state compensation plan, etc.; maintain payroll records; audit, verify and process payroll and benefits information, and monitor a variety of payroll and benefit program activities.

Positions work closely with human resources staff and provide back-up to many of the services provided by HR assistants, coordinators and specialists. Positions are often required to consult with management on the impacts of proposed employment related settlements and organizational and staffing changes.

The most complex positions described by this classification level are distinguished by the responsibility for making final determinations on payroll and benefits issues of a complex nature, as opposed to routine, recurring determinations rather than having those complex issues resolved by higher level payroll positions. The most complex positions operate under general supervision and perform the full range of activities (i.e., from routine to complex) in two or more of the following areas for a majority of the time: (1) establish and maintain payroll records for multiple employment types which may include classified, unclassified, limited term and, in the university system, student hourly; (2) process and monitor time and attendance records; (3) explain benefits programs and consult with employees regarding benefits and impact of moving between employment types; (4) coordinate the Worker's Compensation and/or Unemployment Compensation program(s); (5) prepare and submit monthly insurance reports; or (6) reconcile detailed and complex appointment and payroll information for positions with multiple funding sources and requirements within the UW system.

The consequence of error for positions at this level is significant and can have a financial and personal impact on employees if the work is not completed accurately and timely. Positions in this classification are responsible for ensuring employees are provided with detailed and timely information regarding payroll and benefits programs and activities and that documents are appropriately completed and submitted to the necessary parties for final processing.

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This level encompasses positions that perform the most complex payroll and benefits related functions for a majority of time within: (1) the central payroll and benefits office of a state agency, **OR** (2) a complex satellite office of a state agency that operates under delegation and independently from the central office payroll section, **OR** (3) a Department of Corrections Institution that meets the definition of complex and is defined as medium (200 to 599 FTE) or large (\geq 600 FTE), **OR** (4) the central payroll and benefits office of a UW campus, **OR** (5) a complex satellite office of a UW campus (as defined in Section II of this specification).

Positions that perform the most complex payroll and benefits functions within (1), (2) or (3) above:

Positions at this level function very independently and perform the full range of payroll and benefits program duties described at the Payroll and Benefits Specialist level and, in addition, calculate complicated payroll adjustments, reconcile and/or approve final reports required for payroll and/or benefits information, perform in-depth research of statutes, codes, policies and procedures, interpret and apply provisions of the state compensation plan, and provide training and/or write manuals for other staff.

Positions at this level may serve as a primary coordinator of a specific functional area of payroll including but not limited to, retirement counseling; insurance, tax withholdings (domestic and international), leave accounting, garnishments, tax sheltered annuities, and other services related to deduction reporting for the agency; financial systems reconciliations; sole coordinator or lead payroll and benefits staff person for the entire agency; or function as a department-wide payroll resource for programs such as social security/Medicare, W-2 earnings, various insurance programs, retirement, etc. or coordination of an agencies unique payroll subsystem.

Positions that perform the most complex payroll and benefits functions within (4) or (5) above:

Positions in this classification within the University of Wisconsin System may be located within the central payroll office of a University of Wisconsin campus or a complex satellite office (as defined in Section II of this specification). Positions at this level operate very independently, referring only the most complex questions to higher level supervisors or administrators, and may lead the work of payroll and benefits staff or program support staff. Positions have responsibility for multiple employment types including any combination of classified, faculty, academic staff, graduate assistants and research assistants, employees in training, post grad trainees, post doc fellows, project, and student hourly.

In addition to the allocations listed above, positions in the University of Wisconsin System allocated to this classification meet at least one of the following allocations: (1) function as the sole or lead payroll and benefits staff with oversight for all payroll and benefits activities in a UW College Dean level payroll office or complex UW satellite office where no payroll program supervisor position exists; or (2) perform complex payroll and benefits functions in a UW campus central payroll office, college Dean level central payroll office or complex satellite office; or (3) serve as a program expert for managing a payroll function as identified above providing expertise and customer service to the 26 campuses in the UW system; or (4) reconcile the UW accounting system records to DOA records including salary and fringe benefit expenditures, analyze and resolve discrepancies between the two systems and manage large complex expenditure ledgers and accounts for the 26 campuses.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed, and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification series was created effective June 17, 2012, and announced in Bulletin OSER-0309-MRS/SC. This classification replaces the Payroll and Benefits Specialist 1-5 classifications, Payroll and Benefits Specialist Confidential and Payroll and Benefits Specialist Advanced Confidential that were abolished on the same date. This classification was created in order to simplify the classification system for this occupational area.

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