

Human Resources Department  
 16 JUL 2019  
 By: *QZ*

**Augmentations/Reallocations  
 Request to Classify Form**  
 (This form is not needed for a change in FTE)



**Instructions:** Please submit the Request to Classify Form for each new position or reallocation of an existing position to Irene Espinoza, in the Human Resources Department (HRD). HRD will notify you regarding the status of your request or if additional information is necessary. **Please attach a copy of the current and proposed organizational chart depicting the proposed position. Both organizational charts must reflect current FTE's (filled and vacant).**

Department/Division: Auditor-Controller /Disbursements Payroll

Current Budget Unit Number: 1110-8372

New Budget Unit Number:  
 (if applicable) \_\_\_\_\_

Department Contact for Information: Name: Nairi Davis  
 Phone: 831-755-5092

Select Corresponding Position Status Maintenance Code (PSTS) for Position Status Maintenance Transaction (PSMT):		Insert # of Requested Allocations (same class only)
<input type="checkbox"/> New Allocation		
<input type="checkbox"/> Reallocation, Filled Position	<i>[Insert Current Classification Title]</i>	
<input checked="" type="checkbox"/> Reallocation, Vacant Position	Accountant Auditor III	

Estimated % of total time spent on task/duty (column should equal 100%)	DESCRIPTION OF TASKS/DUTIES TO BE PERFORMED Use a separate paragraph for each task or duty. Attach additional sheets as necessary. <b><u>Do not include verbiage directly from the class specification.</u></b> <i>(Please note rows will expand to allow for thorough description of task/duty)</i>
25	Manage and Supervise a current Payroll staff of 14 performing payroll operations, payroll systems configuration support, reconciliation responsibility and retirement reporting. Ensure that their quality of work and professional judgement meets expectations of the ACO and the County's approximately 6,000 employees. Train and advise staff of any and all FLSA, MOU, County policies and payroll best practices that have an impact on how they perform their tasks. Answer questions from elected officials and management in all areas of Payroll. Plan the work and organization of the staff to be efficient and effective.

25	Serve as Payroll subject matter expert for the HRM system. Providing guidance, leadership and problem-solving skills to modify or implement processing strategies and improvements, including documentation. Design program specification updates to the HRM system and provide direction to Business Analysts on system configuration changes. This process includes reviewing applicable county policies and procedures and working with HR on negotiations with labor groups as it pertains to payroll matters and understanding union contracts. Should monitor and stay current on Best Payroll Practices, Federal, State labor, tax and benefit law. Responsible for assessing payroll system functionality and mapping necessary system design changes required for updates. Design and process business test cases to ensure data validity.
10	Maintain the county's established payroll services: salary, deductions, taxes, reporting, time collection and pay systems. Identify system issues based on edit reports & payroll data inconsistencies. Conduct regular audits and investigate data discrepancies to include documenting issues and submitting to software vendor for resolution.
10	Oversee HRM Payroll system testing by providing test cases, user/support coaching as needed. Develop and implement appropriate action plans in response to payroll issues. Auditor payroll staff activity, customer service interactions between payroll staff, employees and management.
10	Receive payroll problems, issues from ACO Payroll staff, ERP business analysts, departmental timekeepers, human resource analysts, benefit coordinators, managers & supervisors, and employees. Resolve problems ranging from incorrect processing, payment shortages, payroll expense reconciliations, lost documents, inconsistent payroll results
5	Interface and provide payroll expertise to ERP Business Analysts and County IT system staff to resolve technical and operational issues. Review payroll system processing issues and validate payroll data consistency in production environment. Compile county employee data from a wide variety of sources (e.g. timesheets/payroll, salary adjustments, tax deposits, etc.) for the purpose of analyzing issues, ensuring mandated requirements, and/or monitoring program components.
5	Oversee reconciliation of daily payrolls to FIN. Responsible for reconciling the payroll cash clearing account and payroll liability accounts in a timely manner. Oversight of the CalPERS Health payment and necessary payroll adjustments and journal entries. Oversight and training of the personnel assigned to the reconciliations.
5	Ensure compliance and participate in all internal and external audits-Manage projects of all scope to ensure payroll representation, and/or successful payroll implementation and integration. Regularly collaborate with monthly cross-functional team meetings such as HR Link and Benefit coordinators. Analyze benefit and human resource processes to ensure payroll process compatibility to produce accurate payroll results. Investigate root cause for validation and import errors; provide action steps to HR departmental staff, or department administrative support staff to resolve.

**JUSTIFICATION FOR REQUEST:** Describe what changes have occurred (i.e., new legislative mandates, departmental reorganization, new services, new equipment, etc.) that necessitate the need for an additional position. Explain why duties cannot be absorbed by another existing position. Describe consequences or ramifications if the position is not approved. *[Please note field(s) will expand to allow space for justification]*

The recent vacancy of an Accountant Auditor III position has created the opportunity to reorganize the Payroll Division within the ACO to a more efficient and effective long-term structure. This will involve moving higher end management functions from two existing Accountant Auditor III positions to one position to ensure a single point of accountability and responsibility for payroll functions. In addition, this vacancy allows the ACO to address the complexity of the combined duties that will be performed by this position.

This change is driven by the shift in technology from mainframe to pc and cloud-based systems which has moved substantial system configuration and design work to the payroll function from traditional computer programming positions. This change will also address the increasing size of the payroll unit responsibility (an addition of 25% or 1,000 paychecks over last ten years), and complex reporting and compliance issues due to legislative actions.

Approval of this reallocation request will allow the ACO to recruit a payroll professional at a level able to provide adequate support for new and changing system design and configuration requirements, and to ensure compliance with new and existing regulations relating to taxes, benefits, and payroll law. The existing Auditor-Controller Payroll Staff do not possess the knowledge and experience necessary to handle the level of management work and oversight of the payroll function that is required.

As vacancies occur in the Payroll Unit, the ACO will take each as an opportunity to assess the existing structure and make positive changes that contribute to the long-term efficiency of the payroll unit.

Were the new duties previously performed by another position(s)?

No       Yes (If yes, what is/are the job title(s) of the other position(s)?)

No new duties.

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Is there any other position(s) within the department performing in a similar capacity assigned comparable duties to this position?

No       Yes (If yes, what is/are the job title(s) of the other position(s)?)

Accountant Auditor III

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Has reapportioning duties among currently available positions to avoid adding an additional position been considered?

No       Yes (If no, explain why this is not a viable alternative)


The existing Auditor-Controller Payroll Staff do not possess the knowledge and experience necessary to handle the level of management work that is required.

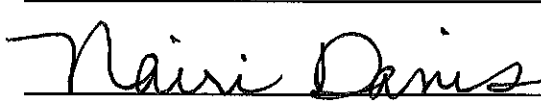
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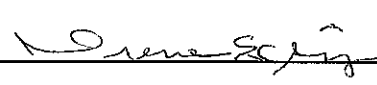
Has reappropriating duties among currently available positions to avoid adding an additional position been considered?

No       Yes (If no, explain why this is not a viable alternative)

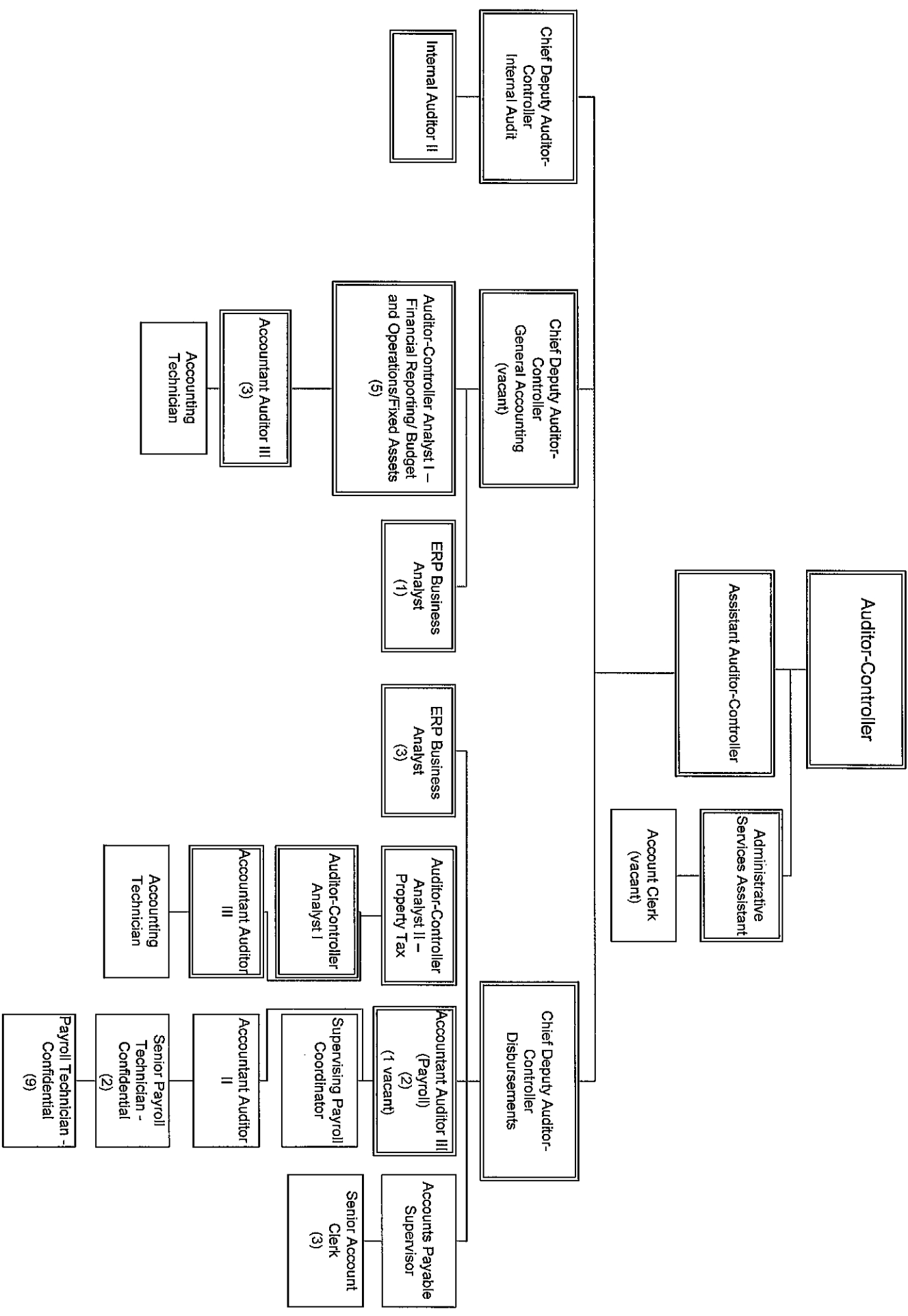
The existing Auditor-Controller Payroll Staff do not possess the knowledge and experience necessary to handle the level of management work that is required.

<b>DEPARTMENT HEAD:</b>	
Comments:	
Department Head Signature: <u></u>	Date: <u>7/16/19</u>

<b>DEPARTMENTAL HR ANALYST:</b>	
Class Recommendation: <u>Auditor-Controller Analyst I</u>	Class Code: <u>20B24</u>
Departmental HR Analyst Signature: <u></u>	Date: <u>7/16/19</u>

<b>FOR HRD USE ONLY:</b>	
Approved Class Title: <u>AUDITOR - CONTROLLER ANALYST I</u>	Class Code: <u>20B24</u>
HRD Classification Analyst Signature: <u></u>	Date: <u>7/17/19</u>
Distribution of HRD Job Class Determination: <input type="checkbox"/> Rocio Quezada (CAO - Admin. Secretary) <input type="checkbox"/> CAO Budget Analyst <input type="checkbox"/> Departmental HR Analyst	

# Auditor-Controller 2019 – 2020 Organization Chart



# Auditor-Controller 2019 – 2020 Proposed Organization Chart

