



**Job Title:** Payroll and Compliance Specialist  
**Department:** Human Resource Services  
**Reports To:** Director of Human Resources  
**FLSA Status:** Non-Exempt

**Prepared By:** Cassie Hall, HR Director  
**Prepared Date:** April, 2023  
**Approved By:** Jim Carney, CFO  
**Approved Date:** April, 2023

**Purpose of Position:** The Payroll and Compliance Specialist reports to the Director of Human Resources. This position oversees all aspects of payroll for the Diocese, providing payroll system/software expertise and ongoing support to parishes, schools, and other entities. The Specialist is responsible for preparing and running payroll, uploading retirement plan contributions, and reconciling benefits billing for the Center for Catholic Life, as well as for developing and sharing best practices in these areas for entities across the Diocese. In addition, this position works closely with parishes, schools, and other ministries to ensure compliance in several HR and payroll related areas, including employee tax forms, Affordable Care Act review and reporting processes, and employee records.

**Essential Duties & Responsibilities:**

- Develop and demonstrate high-level expertise with the payroll software system, Paylocity, and its functions across modules in Payroll and HR. Identify and recommend updates to payroll processing software, systems, and procedures.
- Prepare and process payroll for Chancery, Catholic Social Services, and Resurrection Cemetery Association employees:
  - Prepare time entry and approval emails for each payroll, and enter/correct time entry as needed.
  - Conduct accurate and timely processing of payroll updates including new hires, terminations, and changes to pay rates.
  - Process for payment all employee withholding liabilities, including Flex program elections, donation pledge payments, retirement plan contributions, etc.
  - Ensure pay is processed on time, accurately, and in compliance with government regulations.
- Assist parish, school, and ministry locations across the Diocese with payroll scheduling, set-up, and processing. Develop guidelines and training materials that demonstrate best practices. Troubleshoot issues that arise.
- Assist locations across the Diocese in year-end preparedness, including the issuing of W-2 and 1094/1095 tax forms.
- Provide support to the Human Resources Director regarding employee benefits administration:
  - Administer all Flex and HSA deposits Diocese-wide.
  - Ensure all Chancery, CSSM, and RCA benefits changes are entered appropriately in the payroll system for payroll deduction.
  - Verify the calculation of monthly premium statements for all group insurance policies. Resolve billing or administrative problems.
  - Monitor Affordable Care Act compliance.
  - Assist with benefit reporting and compliance activities.
- Provide support to the Human Resources Director regarding the maintenance of Chancery, CSSM, and RCA employee records, in particular required forms and items for HR compliance (I-9, W-4, MW-4, etc.)

- Assist parish, school, and ministry locations with required employee documentation in Paylocity.
- Submit required reports as requested by government entities, such as payroll wage reports, occupational injury reports, etc.
- Cooperate with financial audits by providing records and documentation to auditors.
- Perform other duties as assigned.

**Competencies:**

**Better Health**

Develops self and others by continually improving health through all aspects of physical and mental well-being.

**Service**

Committed to customer service excellence. Is attentive to detail and accuracy and looks for improvements continuously. Monitors quality levels, finds root cause of quality problems, and owns/acts on quality problems.

**Collaboration**

Works well with others and displays team-oriented behaviors in all interactions. Actively works to create a win-win environment, and treats customers and other partners with respect.

**Innovation**

Generates new ideas and challenges the status quo. Supports change, solves problems creatively, and encourages creativity in others.

**Caring**

Demonstrates concern for others. Shows respect for our customers, coworkers, and business partners.

**Integrity**

Deals with others in a straightforward and honest manner. Is accountable for actions; maintains confidentiality, and behaves in a manner consistent with the diocesan Code of Business Ethics and Conduct.

**Adaptability/Flexibility**

Adapts to change, is open to new ideas, takes on new responsibilities, handles pressure, adjusts plans to meet changing needs.

**Communication**

Communicates well both verbally and in writing, creates accurate and punctual reports, delivers presentations, shares information and ideas with others, and has good listening skills.

**Job Knowledge**

Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands diocesan mission/values, keeps job knowledge current, is in command of critical issues.

**Problem Solving/Analysis**

Breaks down problems into smaller components, understands underlying issues, can simplify and process complex issues, understands the difference between critical details and unimportant facts.

**Productivity**

Manages a fair workload, volunteers for additional work, prioritizes tasks, develops good work procedures, manages time well, handles information flow.

**Teamwork**

Meets all deadlines and responsibilities, listens to others and values opinions, helps leader to meet goals, welcomes newcomers and promotes a team atmosphere.

**Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience:**

*Minimum Requirements:*

- Bachelor’s Degree in Accounting, Finance, or Business Administration or equivalent education/experience
- 2 years of payroll accounting experience
- Strong interpersonal skills, including teaching, training, and mentoring
- Completion of *VIRTUS Protecting God’s Children* training requirements

*Desired Qualifications:*

- CPP payroll certification
- Experience with Paylocity
- Understanding of financial practices of parishes and schools in a Catholic context

**Salary Range:** \$24-\$26 per hour, depending on experience

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, walk, drive, sit, talk and hear. The employee must occasionally lift and/or move up to 30 pounds.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- This position generally functions in an office environment with a controlled atmosphere building. The noise level in the work environment is usually moderate.
- This position requires some travel within the Diocese of Helena, so driving in a vehicle and working within the environment provided in parish and school locations is also required.
- A partially-remote/hybrid working environment may be arranged for this position.

The above statements are intended to describe the general nature of the work being performed by employees in this position. They are not intended to be an exhaustive list of all duties, responsibilities, and qualifications. The Diocese of Helena reserves the right to amend and change responsibilities to meet business and organizational needs as necessary.

I am able to perform the essential functions of this position with/without accommodations.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_