

HR Generalist/Payroll & Benefits Administrator

| | |
|---|--|
| <p>Employee:</p> <p>Department: Human Resources</p> <p>Reports To: Director of Human Resources</p> | <p>FLSA Status: Exempt</p> <p>Updated: December 2019</p> |
|---|--|

SUMMARY: The HR Generalist/Payroll & Benefits Administrator is responsible for payroll and benefits administration; and employee recognition programs. Responsible for having overall knowledge of all human resource functions. Conducts employee benefit meetings. Promotes and maintains the credit union’s mission, values and culture. Provides exceptional communication and service to employees. Sets the example of an engaged employee and supports employee engagement throughout the credit union.

ESSENTIAL DUTIES AND RESPONSIBILITIES: *Must effectively carry out the essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission and core values in a positive manner. Other duties may be assigned.*

1) Payroll Administration

- a) Is the payroll expert. Makes recommendations for payroll related policies. Provides training as needed (i.e. Managers, staff) to ensure compliance and full utilization of tools.
- b) Responsible for timely, accurately and compliantly processing the Credit Union's bi-weekly payroll. Audit and process payroll documents. Process employee data for new hires, changes, additional earnings, etc.
- c) Processes employee Time & Attendance data to payroll and reconcile variances. Approve and release time in the time system.
- d) Prepares and maintain employee files, assuring accuracy, compliance and confidentiality.
- e) Maintains vacation and sick time records.
- f) Develops in depth understanding of payroll software and HRIS. Create reports on demand.
- g) Assists employees in registering for or resetting access to online portal.
- h) Responsible for month-end duties including approving HR related invoices and ensuring timely payment, submitting payroll accrual (with management approval) and general ledger reconciliation.
- i) Maintains vendor contact for payroll and recruiting and other HR related activities.

2) Benefits Administration

- a) As the Employee Benefits expert, administers all employee & volunteer benefit programs such as medical, dental, vision, disability, retirement programs (Defined Contribution 401(k) & Defined Benefit Plans) and Executive Benefits (457b & COLI)). Process tuition reimbursements, I-9/e-Verify, retirement notifications, workers compensation and life insurance claims. Responsible for:
 - Employee On-boarding: Provide in-depth benefit presentation for all new hires during the onboarding process. Distributes enrollment materials and determines eligibility.
 - Employee Service: Assists employees regarding benefits claim issues and plan changes. Responds to benefits inquiries on plan provisions, benefits enrollments and status changes. Enrolls employees with carriers and process life status changes.

- **Vendor Management:** Works with HR benefit partners for escalated support needs, including but not limited to: plan design, claims administration and appeals, COBRA, retirement administration, and HRIS data integrity.
 - **Employee Education:** Prepare and setup meetings designed to help employees obtain information and understand company benefits. Conducts special Employee Retirement Education Sessions. Ensures that employee forms and resources are properly updated on the Intranet.
 - **Wellness:** Responsible for development and execution of Employee Wellness Program. Establish initiatives and programs that help employees attain optimal health. Organizes wellness events and provides resources for employees.
 - **Plan Design:** Works with brokers to conduct annual benefits review. Conducts research, analyzes plan options, conducts cost analysis and makes recommendations to Director of HR. Develops census data and solicits insurance co. quotes. Develops cost control procedures to assure maximum coverage at the least possible cost to company and employee.
 - **Data Integrity:** Ensures the accuracy of all benefit enrollments and provide vendors with accurate eligibility information. Updates HRIS database with new and changing information; ensures accuracy and integrity of information. Responsible for employee benefit file maintenance and storage retention requirements.
 - **Employee Leaves:** Effectively interprets FMLA and ADA implications as they relate to leaves of absences/disabilities. Processes and administers all leave-of-absence requests and disability paperwork: medical, personal, disability and FMLA. Makes recommendations to employee leave policies.
 - **Employee Termination:** Properly record, track and administer the steps needed to comply with COBRA law and appropriately deliver continuation of employee benefits.
- b) Organizes financial wellness sessions/events in support of employee financial educations and well-being. Collaborates Wealth Management and Learning & OD to ensure employees have the opportunity to plan/prepare for the future.
 - c) Completes annual reporting for employee benefits: ACA, 1099, 401K, Pension, Workers Comp, Unemployment, etc.
 - d) Coordinates and leads quarterly Trustee meeting for Defined Benefit and 401K Plans. Records and distributes minutes.
 - e) Completes and submits unemployment requests from the Department of Jobs and Family Services.
 - f) Administers quarterly Medical Reimbursements for Board of Directors.
 - g) Provides benefit support to HR partners (vendors, team members, management).
 - h) Develop in-depth understanding of HRIS and all vendor enrollment systems and websites. Create reports on request.

3) Employee Recognition

- a) Plans and hosts employee celebration events. Coordinates recognition gifts for employee life events.
- b) Coordinates the Service Award Program.

4) General HR duties

- a) Participates in the new employee onboarding experience.
- b) Respond to employment verifications and surveys as needed.

- c) Ensure all required reporting, forms, and posters are up to date and maintained accurately.
- d) Participates in developing Human Resource department goals, objectives, and systems.
- e) Provides backup of duties for HR Team.

Performance Measurements

- 1. The Director of HR is properly informed of work status and employee issues.
- 2. Effective working relationship exists with HR Generalist/Recruiting & Performance.
- 3. Benefits programs are administered with accuracy and employees are informed of options, conditions, costs, and all pertinent information needed for decision making.
- 4. Payroll is processed in accordance with legal requirements and Credit Union procedures and policies.
- 5. Excellent members service is provided. Effective working relations exist with other departments.
- 6. All records are current, accurate, and organized.
- 7. Procedures for responsibilities are current and well documented. Fully cross-trained and competent in backing up HR Generalist/Payroll & Benefits Administrator.
- 8. Professional business relations exist with outside service providers, trade professionals, auditors, and business contacts.

Expectations for Employees

- 1) Supports and advances Sun Federal’s mission, vision, values and culture. Accepts responsibility to live Sun Federal’s culture. Makes a positive contribution to business plan objectives, goals and outcomes. Follows Sun Federal’s Service Behaviors. Shows professionalism, empathy and respect in all interactions with members, internal and external.
- 2) Takes personal responsibility to actively listen to the members, understand their needs and take initiative to help the member as your first priority. While some have little direct member contact, every position at Sun Federal supports the member.
- 3) Take ownership of job duties. Offer team members assistance when necessary to help develop a fully competent and cohesive workforce. Recommends and develops process improvements and procedures to enhance productivity and improve service.
- 4) Responsible for personal development through training, collaboration and teamwork. Understands and adheres to all policies, procedures and regulations. Maintains knowledge of regulations appropriate for position (i.e. Bank Secrecy Act, OFAC, etc.) and attends all training as it relates to position related regulations. Passes annual compliance requirements.
- 5) Adheres to Sun Federal’s security procedures and safeguards member information.
- 6) Demonstrates professionalism in dress, tone, flexibility and communication.
- 7) Consistently acts as part of a cohesive team, demonstrating excellent interpersonal skills and the ability to interact positively with other employees. Maintains open and respectful communication with other departments. Handles conflict directly and discreetly.

QUALIFICATION REQUIREMENTS

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

EDUCATION/CERTIFICATION: Bachelor’s degree in business specifically Human Resource Management. Professionally certified in Human Resource Management (PHR, SHRM- CP, etc).

REQUIRED KNOWLEDGE: Knowledge of human resource laws and regulations. Knowledge of payroll administration. Knowledge of benefits programs including health insurance, long-term disability programs, workers' compensation insurance, unemployment regulations, life insurance, 401k & Defined Benefit plans, COBRA, etc. Understanding of human resource policies and programs. Thorough knowledge of state and federal regulations related to benefits administration. Knowledge of Credit Union policies and procedures.

EXPERIENCE REQUIRED: Three to five years of experience in human resources.

SKILLS/ABILITIES: Ability to motivate and influence others. Significant level of diplomacy and trust. Excellent oral and written communications abilities. Professional image that promotes Sun Federal's brand and culture. Excellent judgment and decision-making skills. Solid interpersonal abilities. Excellent presentation and organizational skills. Ability to write clear, concise emails, facilitate meetings and give presentations.

PHYSICAL ACTIVITIES AND REQUIREMENTS

FINGER DEXTERITY: Using primarily just the fingers to make small movements such as typing, picking up small objects, or pinching fingers together.

TALKING: Especially where one must frequently convey detailed or important instructions or ideas accurately, loudly, or quickly.

AVERAGE HEARING: Able to hear average or normal conversations and receive ordinary information.

AVERAGE VISUAL ABILITIES: Average, ordinary visual acuity necessary to prepare or inspect documents or products or operate machinery.

PHYSICAL STRENGTH: Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally.

WORKING CONDITIONS: No hazardous or significantly unpleasant conditions.

MENTAL ACTIVITIES AND REQUIREMENTS

REASONING ABILITY: Ability to deal with a variety of variables under only limited standardization.

Able to interpret various instructions.

MATHEMATICS ABILITY: Ability to compute discount, interest, profit, and loss; commission markup and selling price; ratio and proportion and percentage. Able to perform very simple algebra.

LANGUAGE ABILITY: Ability to read a variety of books, magazines, instruction manuals, atlases, and encyclopedias. Ability to prepare memos, reports, and essays using proper punctuation, spelling, and grammar.

Ability to communicate distinctly with appropriate pauses and emphasis; correct pronunciation (or sign equivalent); and variation in word order using present, perfect, and future tenses.

JOB DESCRIPTION INTENT & PURPOSE

Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.

All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all inclusive. Additional functions and requirements may be assigned by managers as deemed appropriate.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Job descriptions are not intended as and do not create employment contracts. Sun Federal maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.