

Bill Christianson, CPFO Comptroller

Charles Roedel, CPA, CIA Deputy Comptroller Toni Biscobing Special Deputy Comptroller

Richard Bare, CPA Special Deputy Comptroller

March 4, 2025

Mr. Harper Donahue IV, Director Department of Employee Relations City Hall Room 706

Dear Mr. Donahue,

Re: Request for temporary appointment

The purpose of this letter is to request a temporary appointment extension of Theresa Spidell in the position of Accountant Lead to be made effective May 25, 2025. Ms. Spidell has taken on an additional level of responsibility related to implementation of the Workday ERP system. Additional responsibilities will include managing the entirety of the W2 C testing process related to Workday implementation. Additionally, she will be assisting with garnishment process and pension testing. The additional responsibilities all require a higher skill level than is required for a City Payroll Specialist. Appointment through pay period 26 will allow for completion of unit testing and end-to-end testing.

Thank you for your consideration of this request. If you have any questions, please contact me at Extension 2302 or <u>croedel@rnilwaukee.gov</u>.

Charla Bentel

Charlie Roedel Deputy Comptroller





Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



NOTICE OF TEMPORARY APPOINTMENT

Rule IX, Section 2 of the Civil Service Rules allows a department to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

When making an employment offer for a temporary appointment, the appointing officer must submit this completed form to DER no later than the close of the pay period in which the temporary appointment has been made. All temporary appointees must meet the minimum requirements established for the position to which the individual is appointed.

SEND COMPLETED FORM AND SUPPORTING DOCUMENTATION TO DER, CITY HALL, ROOM 706 OR DERCERTIFICATION@MILWAUKEE.GOV

TEMPORARY APPOINTMENT / APPOIN	TEE DETAILS	aa aa ay ahaa ah				·····		
DEPARTMENT/DIVISION	LAST NAME			FIRST NAME			INITIAL	
Comptroller's Office	Spidell			Theresa				
AUTHORIZED POSITION TITLE	PAYRAN	IGE	F&P COMMITTEE APPROVAL DATE		ATE	REQUISITION #		
Accountant Lead	countant Lead 2KX							
UNDERFILL TITLE (IF APPLICABLE)	NGE		No If yes					
	s, Referr	al#						
REASON FOR TEMPORARY APPOINTM		EFFECTIVE DATE	AN	TICIPATED EXPIRATIO	N DATE	T.A. RATE OF P	AY	
During Leave of Absence of an er		2/17/2025	12/20/2025 \$3,182.04					
To perform services of a tempora								
ATTACH A COPY OF THE CURRENT JOB PROVIDE AN EXPLANATION OF WHY T			TING THE	INFORMATION BELOV	V	is en alterration de la		
PROVIDE AN EXPLANATION OF WHY T Terri Spidell has taken on an ad			3mentati	on of the Morkdov	FRD ~	vstem Additi	onal	
responsibility will include manag	ging the entirety of the W2 C te	sing process i	related to	Workday implem	entatio	n; as well as a		
with garnishment process and p	ension testing. All require a h	igher skill leve	I than is	required for City P	ayroll	Speicialist.	-	
EXPLAIN HOW THE INDIVIDUAL WAS S			ECTION PP	OCESS USED AND IF M	OT FROM	A AN ELIGIBLE US	r, HOW	
THE INDIVIDUAL WAS IDENTIFIED AS A	A POTENTIAL TEMPORARY APPOINTI	EE:						
Terri was selected based on the skill set she possesses, including her understanding of City Payroll processes, ability to work independently, and advanced excel skills. Terri is also currently stuying for the CPP certification, providing her with additional								
education and payroll knowledg		my stuying tor	uie GPP	ceruncation, provi	ung h		Idl	
	y							
PROVIDE INFORMATION TO DEMONST		THE MINIMUM	REQUIREN	IENTS:				
TRAINING AND EDUCATION:	WORK EXPERIENCE:			OTHER RE	QUIREN	MENTS (I.e. LICENS	SES)	
Five years progressive experier				/ (0 / 01)00		el skills. Analyi		
general office work with three years of as City Payroll Speicialist.	year-to-date wage, tax	x and deduction	•	نا مسالم م		blems and take erstanding of t		
CPP dersirable	accumulations. Ability rules, regulations, pol	y to interpret and	d to apply			erstanding of t large automate		
	when oudifing and pre	accessing navroll	o, and lav	və				
CITY OF MILWAUKEE EMPLOYEE?	F YES, CURRENT DEPARTMENT:	CURRENT	F POSITION	I TITLE:		EMPLOYEE ID NU	JMBER:	
	Comptroller's Office	City Pa	Payroll Specialist			018982		
IS THE INDIVIDUAL BEING GIVEN THIS								
APPOINTING BOARD OR BODY, DIREC		E OF APPOINTIVE	CITY OFFI	CIAL? (Refer to CSC R	ule VIII,	Section 10 regard	ding nepotism.)	
V No Yes – Explain Relation				******				
THIS TEMPORARY APPOINTMENT IS N DAYS UNLESS AN EXTENSION IS APPR		X, SECTION 2 OF			AND IS I			
REPORTING OFFICER	SIGNATURE.		TITLE			DAT	E)	
Joann Bielinski (Junmill th Al	M	-	Payroll Manage	er	2/2	7/25	
APPROVING OFFICER	SIGNATURE	I /	TITLE	-		DAT	E	
Charles Roedel	Charles R	all	Der	outy Comptroller		ג/ב	5/2025	
	THIS SECTION FO	R DER REVIEW						
DER REVIEW COMPLETED BY:	SIGNATURE		TITLE			DATI	E	



Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

Rule IX, Section 2 of the Civil Service Rules allows a hiring authority to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

SECTION I. TO BE COMPLETED BY HIRING AUTHORITY - PLEASE TYPE OR PRINT LEGIBLY

APPLICANT NAME (last, first, middle)		DATE
Theresa Spidell		02/25/2025
POSITION TITLE	PAY RANGE	RATE OF PAY
Accountant Lead	2KX	\$3,182.04

SECTION II. TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

I understand that if I am appointed to the position described above on a temporary basis, that I must meet the requirements for the position. I further understand that this temporary appointment may expire at any time and is limited to a period of 90 days, unless an extension at the request of the hiring authority is approved by the City of Milwaukee Civil Service Commission.

I understand that as a temporary appointee I am ineligible for paid holidays, sick leave, vacation or other benefits while serving on this temporary appointment, and that this temporary appointment shall not confer upon me any privilege of regular appointment. (Note: A current City of Milwaukee employee who accepts a temporary appointment to a different position retains his/her current benefits and civil service status).

I understand that if I wish to be considered for regular employment I must compete in a Civil Service examination for the position, and must pass the examination with a grade which shall place me among the top five scores on the eligible list in order to be eligible to interview for regular appointment to the position.

I understand that acceptance of a temporary appointment will not affect my rights to certification for permanent appointment to any position for which I am currently on an eligible list for.

In accordance with Civil Service Rule VIII, Section 10, concerning nepotism, I hereby certify that I am not related, either by blood or through marriage, to the appointing officer or to any member of the appointive board or body or to any direct superior or to any elective or appointive City official. (This includes relative of both whole and half blood, and extends to persons as closely related as first cousins when the relationship is by blood, or more closely related than first cousins when the relationship is through marriage, and includes the cases of husbands of sisters-in-law and wives of brothers-in-law).

A Rule IX, Section 2, temporary appointee who is on an eligible list may be considered for future regular appointment when the appointee ranks among the certifiable highest eligible on the list, or compete in a future examination.

Temporary Appointment Applicant Signature

02/27/25

Witness Name (Print) -

JOB DESCRIPTION

City of Milwaukee CS-25, Rev. 11/14

Instructions: Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

FOR DER USE ONLY

Vacancy No.

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City Service	Finance
Commission:	Committee:
Fire & Police	Common
Commission:	Council:

1. Date Prepared/ Revised: 02/18/2025	2. Present Inc	cumbent:	Is incumbent underfilling position?				
3. Date Filled:	4. Previous li	ncumbent:	YES NO X				
5. Department:		Bureau: Unit:					
Comptroller		Division: Payroll Administration	Section:				
6. Work Location: City Hall R	oom 404	Telephone: Email:	Work Sched Hours: 8 /				
7. Represented by a	8. Bargaining	Unit:	9. FLSA Status (check one)				
Union? 🗌 Yes 🖾 No		ouncil 48, which local?	🛛 Exempt 🗌 Non-Exem				
10. Official Title:		2 12 MMM	Pay Range	Job Code	EEO Code		
Accountant Lead			2KX	4880	102		
Underfill Title (if applied	cable):						
Requested appli	Fitle (if cable):						
Recommended Title (I	DER Use Only):	Approved by: Date:					

11. BASIC FUNCTION OF POSITION:

Coordinate W2 c testing process and perform high level testing of other Workday payroll functions. Edit, process, and pre-audit all data required for the proper operation of PeopleSoft Human Resources System (HRMS) to ensure the accuracy of payments made to approximately 10,000 City employees. Answer questions and resolve problems related to employee pay, deductions, leave balances, and other payroll issues. Staff is the final authority to ensure compliance with the provisions of labor agreements and ordinances covering all personnel.

12. DESCRIPTION OF JOB (Check if description applies to **Official Title** in **Underfill Title**):

A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
50	 Workday testing to include testing for entire W2 c process including communications, filing of affidavits, collections of contributions, tax forms, pension contributions through the 80 to 100% process, electronic filing flatfiles, etc. Assist with garnishment testing and pension testing. Assist with payroll parallel testing.
20	• Edit and audit all timecard and adjustment records for the City payroll to ensure that all employee pay is properly computed in accordance with City Service Commission rules, Fire & Police Commission rules, Salary Ordinance, Chapter 350, and union agreements. Adjustments consist of reclasses in injury, vacation, sick, FMLA, holiday, comp and overtime hours; TOA hours to clear balances due to terminations, increase hours due to union changes, etc; Dollars that pay retroactive promotions or reclassifications, buyouts due to terminations, special payments due to ordinance or contracts, overpayments, etc. Must focus City procedures as it relates to pensionable periods, tax years. Timecard audits consist of fire short payments, holiday entries, FLSA entries, etc. Instruct/advise, on a daily basis, to department or bureau payroll and HR personnel of proper methods of processing employee payments through HRMS and Citytime. This includes usage of proper forms, dates, related pay/shift codes, instruction on appropriate balancing and controls, taxes, FLSA, and pension.
10	 Processing garnishments, child support, tax levies, and bankruptcies for all City of Milwaukee employees. Review and implement all garnishment, child support, levy, and bankruptcy paperwork, communication, and entries. Inclusive is communication with State and Federal taxing authorities, child support authorities, law offices, garnishees, and the State of WI courts. Must handle high volumes of correspondence via postal mail and electronic mail, computer applications, and calls from garnishees that are in a stressful

% of Time	ESSENTIAL FUNCTION
	situation. Execution of eIWO system for child support orders. Distribution of biweekly deduction registers to the State and various law offices.
5	 Function as Comptroller's departmental payroll clerk. Enter and approve hours in on-line time entry system. Prepare and process employee pay, deduction, and tax requests, personnel reports, job descriptions, sick leave usage and control activity reports. Enter new hires, terminations and transfers. Maintain personnel and payroll files. Generate biweekly payroll reports from HRMS. Certify the departmental bi-weekly payroll. Prepare and maintain OSHA log for reporting occupational injuries and illnesses. Monitor and approve data entered into Employee Self -Service system. Provide accurate and reliable personnel data and information to division heads. Furnish salary information for annual budget purposes. Answer questions on an ad-hoc basis.
5	 Enter and verify federal and state tax forms, lock in letters, direct deposit, employee deductions for pay, inclusive of union fees, political fees, separate banking relationships, separate life insurance arrangements, W and UPAF, salary advances, equipment repayments, and garnishments; for all City of Milwaukee employees. Maintaining the paper files of each.
	 Distribute payroll deduction listings to outside agencies and other appropriate personnel. Communications with outside agencies. Verify electronic transfers of Direct Deposits. Verify payroll checks for payday distribution. Maintain check usage logs.
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B. PERIPHERAL DUTIES:

% of Time	
	•
4	 Input balance adjustments to deductions, especially deferred compensation and FSAs, year-to-date employee earnings balances for the City payroll.
3	 Create, run, and maintain queries in HRMS and Citytime to be used to analyze and resolve bi-weekly payroll problems for the City payroll.
3	 Provide research for information requests regarding City employee payments, leave accumulations and use, deductions taken or other information requests from City employees, or written requests from outside agencies using available reports or system on-line capabilities.
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C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:

Joann M Bielinski, City Payroll Manager

D. SUPERVISION RECEIVED: (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

Minimal supervision. City Payroll Manager and Assistant City Payroll Manager delegate, monitor, and review the work of the Payroll Accountant Lead. Expected to work independently and communicate with appropriate stakeholders.

E. SUPERVISION EXERCISED:

Total number of employees for whom responsible, either directly or indirectly = indirectly supervise work of 3 City Payroll Specialists, and 32 departmental_personnel payroll assistants, payroll supervisors, HR supervisors and provides advice on how to correct entries.

Direct Supervision: List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

b. (c. [e. f. g. h.	Sign or approve work Make hiring recommendations Prepare performance appraisals Take disciplinary action or effectively recommend such
Number Job Title				Extent of Supervision Exercised (Select those that apply from list above, a - h)
	· · ·			

F. MINIMIMUM QUALIFICATIONS REQUIRED: (Indicate the MINIMUM qualifications required to <u>enter</u> the job.)

i. <u>Education and Experience:</u> Three years of experience as City Payroll Specialist. Bookkeeping skills with some accounting background.

ii. Knowledge, Skills and Abilities:

Analytical skills to determine problems and take corrective action. An understanding of the concepts of a large automated on-line payroll system. Knowledge and experience in dealing with payroll data-hours, pay codes, leave types, deduction levels, file controls, year-to-date wage, tax and deduction accumulations. Ability to concentrate for extended periods of time. Ability to interpret and to apply rules, regulations, policies, procedures, federal, and state laws, when auditing and processing payroll transactions. Keyboard skills to be used to enter, correct and access pay, deduction, time and attendance on-line data. Ability to set up spreadsheets and reconcile number of value sets. Advanced Excel skills and knowledge of Word.

- iii. <u>Certifications, Licenses, Registrations:</u> CPP desirable
- iv. Other Requirements:

Good communication skills with ability to assist employees, payroll clerks, or City Mangers with payroll inquiries or problems. Accuracy a must to complete work projects. Ability to communicate with tact and patience.

13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

G. PHYSICAL ACTIVITY OF THE POSITION: (List the physical activities that are representative of those that <u>must</u> be met to successfully perform the essential functions of the job).

CHECK ALL THAT APPLY:

Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.

	Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow,
	slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that
	needed for ordinary locomotion and maintenance of body equilibrium.
	Stooping: Bending body downward and forward by bending spine at the waist. Check only if it occurs to a
	considerable degree and requires full use of the lower extremities and back muscles.
	Kneeling: Bending legs at knee to come to a rest on knee or knees.
	Crouching: Bending the body downward and forward by bending leg and spine.
	Crawling: Moving about on hands and knees or hands and feet.
	Reaching: Extending Hand(s) and arm(s) in any direction.
	Standing: Particularly for sustained periods of time.
	Walking: Moving about on foot to accomplish tasks, particularly for long distances.
	Pushing: Using upper extremities to exert force in order to draw, press against something with steady
	force in order to thrust forward, downward or outward.
	Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained
	motion.
	Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-
	position. Check only if it occurs to a considerable degree and requires substantial use of the upper
	extremities and back muscles.
\square	Fingering: Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole
	hand or arm, as in handling.
	Grasping: Applying pressure to an object with fingers and palm.
	Feeling: Perceiving attributes of objects such as size, shape, temperature or texture by touching with the
	skin, particularly that of the fingertips.
\square	Talking: Expressing or exchanging ideas by means of the spoken word. Those activities which demand
	detailed or important instructions spoken to other workers accurately, loudly or quickly.
	Hearing: Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral
	communication and make fine discriminations in sound.
\boxtimes	Repetitive Motions: Substantial movements (motions) of the wrist, hands, and/or fingers.
	Driving: Minimum standards required by State Law (including license).
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H. PHYSICAL REQUIREMENTS OF THE POSITION: (List the physical requirements that are essential functions of the job.)

CHECK ONE:

\boxtimes	Sedentary Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force
	frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting
	most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other
	sedentary criteria are met.
	Light Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to
_	move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary
	work and the worker sits most of the time, the job is rated for Light Work.
	Medium Work: Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently,
	and/or up to 10 pounds of force constantly to move objects.
	Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently,
	and/or up to 20 pounds of force constantly to move objects.
\square	Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of
	force frequently, and/or in excess of 20 pounds of force constantly to move objects.

I. VISUAL ACUITY REQUIREMENTS: (List the visual acuity requirements that are essential functions of the job.)

CHECK ONE:

Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative: This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
Machine Operators, Mechanics, Skilled Tradespeople: This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
Mobile Equipment Operators: This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.

11 .	ner.	This is a m	nnimum s	tandard i	pased c	on the	criteria	of accuracy	' and	neatness (of work for	janitors,	sweepers,
etc	э.							-				-	

J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. Approximate Percentage of time performing field work: _____%

CHECK ALL THAT APPLY:

\boxtimes	None: The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
	The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes (<i>i.e. warehouses, covered loading docks, garages, etc.</i>)
	The worker is subject to outside environmental conditions: No effective protection from weather.
	The worker is subject to extreme cold: Temperatures below 32 degrees for period of more than one hour.
	The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour.
	The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
	The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
	The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
	The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
	The worker is subject to oil: There is air and/or skin exposure to oils and other cutting fluids.
	The worker is required to wear a respirator.

K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION: List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

CHECK ALL THAT APPLY:

	Camera and photographic equipment	Office	Equipment (desl	k, chair, telephon	e, etc.)		
	Cleaning supplies	Office supplies (pens, staplers, pencils, etc.)					
	Commercial vehicle	🛛 🖾 Packin	Packing materials (boxes, shrink wrap, etc.)				
$ \Sigma $	Data processing equipment						
$ \boxtimes$	Handcart	PC software					
	Hand tools (<i>please list</i>):						
\geq	Office Machines (check all that apply):	Copier	🛛 Facsimile	⊠ Calculator	Cash register		
	Other (please list):						

- SUPPLEMENTARY INFORMATION: (Indicate any other information which further explains the importance, L. difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)
- M. I believe that the statements made above in describing this job are complete and accurate.

Signature of Department Head or Designated Representative

Theresa L. Spidell



Objective: To maintain a permanent position at the City of Milwaukee, where my extensive background in Human Resources and payroll preparation, in addition to customer service skills and knowledge of basic accounting principles, will be an asset.

Employment History

City of Milwaukee Comptroller's Office – City Payroll Specialist July 11, 2021 – present

Duties include edit and audit all timecard and adjustment records for the City Payroll, including but not limited to employee pay being properly computed following City Service Commission rules, including Fire and Police Commission rules, City Salary Ordinance, Chapter 350 and union agreements. Adjustments that consists of re-class of injury hour and/or pay, including W2c processing, various timecard audits to ensure other departments are entering adjustments correctly, review of biweekly pension items and corrections to deductions and/or refunds made, instructions to other payroll clerks regarding CityTime entries, FLSA reviews.

Processing garnishments, child support, tax levies, and bankruptcy paperwork, including communications with various collection agencies and the Federal and State government agencies, and distribution of biweekly deduction registers to various vendors, separate worksheets for Department of Workforce Development levies that require biweekly reports.

Biweekly Comptroller Office payroll tasks, including but not limited to maintaining employee personnel files, reviewing and approving time card entries, time card adjustment processing, running reports from the City Time Time Card Program, FMLA and Paid Parental Leave monitoring, assuring timely HCM entries for payroll, updating and maintaining various payroll related spreadsheets, biweekly payroll reports and OSHA information. Assistance with review of Position Management with HCM.

Enter and verify federal and state tax forms, lock in letters, direct deposit forms, employee deductions for pay, and maintaining any paper files. Assist with CityTime maintenance and setup for new adjustment approvers and Auto Reimbursement employees.

Initiating Standard Operating Procedures for all current City Payroll Specialist tasks, maintaining changes and maintain the SOPs are current with updated information. Set up of various forms, such as Paid Time Off Request and ACH Return, that are now used exclusively within the Comptroller's Office via DocuSign, and the ability to be flexible and assist in various areas as needed.

Study Hours towards the Certified Payroll Professional exam, approximately 128 hours as of February 15, 2025 and expectation to pass the CPP Exam to hold this payroll specific title. Regular review and study within the Paytrain program to gain more payroll knowledge.

City of Milwaukee Treasurer's Office – Tax Enforcement Specialist/Payroll Clerk - Primary March 29, 2015 – July 10, 2021

Duties include training of other Payroll Clerks and managers regarding biweekly payroll tasks and changing payroll regulations, maintaining employee personnel files, posting and monitoring payroll and/or personnel related information, reviewing and approving time card entries, time card adjustment processing, running reports from the City Time Time Card Program, FMLA and EFMLA set up and monitoring, monitoring of timely HCM entries for payroll, updating and maintaining various payroll related spreadsheets, including but not limited to Employee Probation Reports and Annual Review Reports, Staff Hours, biweekly payroll reports, and OSHA information.

Printing of Account Payable checks sent from the Comptroller's Office, printing of Account Receivable invoices from other departments using the FMIS system.

Maintaining a working relationship with the Kohn Law Firm regarding past due accounts that are in collections and processing payments based on collection procedures, review and maintain bankruptcy files, file bankruptcy claims and process bankruptcy payments received monthly from various bankruptcy trustees, including but not limited to, setting up trustee payment spreadsheet breakdowns, entering bankruptcy interest and processing payments in the new Munis tax system, as well as dealing with individuals and bankruptcy attorneys on a case by case basis, download electronic payment and credit card payment information on a daily basis, code tax key account numbers with bankruptcy status in the new Munis tax system, post costs, judgment reports, cost reversals and combined account information from the Kohn Law Firm on a daily basis in the new Munis tax system.

Download and upload information regarding daily lockbox from US Bank, review and research individual property owners if account is going into a foreclosure action, updating and sending work orders for the annual and monthly tax bills to AB Data, processing weekly and monthly Kohn IRI's and deposits, tentative taxes, writing and updating various departmental Standard Operating Procedures. Dealing with members of the public in person and on the telephone in a polite and calm manner and various other tasks as needed.

City of Milwaukee Treasurer's Office – Program Assistant II September 29, 2013 – March 28, 2015

Duties included dealing with members of the public in person and on the telephone in a polite and calm manner. Review and approve time cards. Print Account Payable checks sent from the Comptroller's Office. Print Account Receivable invoices from other departments using the FMIS system. Maintain a working relationship with the Kohn Law Firm regarding past due accounts that are in collections and processing payments based on collection procedures. Review and maintain bankruptcy files, file bankruptcy claims and process bankruptcy payments received monthly from various bankruptcy trustees as well as dealing with individuals and bankruptcy attorneys on a case by case basis. Download electronic payment and credit card payment information on a daily basis. Code tax key account numbers with appropriate status, post costs, judgment reports, cost reversals and combined account information from the Kohn Law Firm on a daily basis. Download and upload information regarding daily lockbox from US Bank, review and research individual property owners if account is going into a foreclosure action and tentative taxes. Write and update various departmental Standard Operating Procedures, and various other tasks as needed.

City of Milwaukee Treasurer's Office – Customer Service Representative II August 17, 2008 – September 28, 2013

Duties included dealing with members of the public in person and on the telephone in a polite and calm manner, answer written correspondence from the public, apply payments received to appropriate tax accounts timely and accurately, reconcile daily lock box manual deposit activity, review of payment histories and prior year tax bills at the customer's request and offering a detailed explanation to customers. Print invoices from other departments using the FMIS system. Maintain a working relationship with the Kohn Law Firm regarding past due accounts that are in collection. Process payments based on collection procedures, review, research and reapplication of refund checks generated within the City of Milwaukee Treasurer's Office. Review and apply or cancel State Lottery and Gaming Credits to individual tax accounts, update various Access databases regarding envelope retention, refund vouches, contemplated special invoicing and payment application. Prepare daily balancing reports and spreadsheets, process accounts payable checks, process accounts receivable invoices and prepare to mail, download electronic payment and credit card payment information on a daily basis. Code tax key account numbers with bankruptcy status, post costs, judgment reports, cost reversals and combined account information from the Kohn Law Firm on a daily basis, download and upload information regarding daily lockbox from US Bank. Write and update various departmental Standard Operating Procedures, prepare correspondence, time stamp, open, sort and distribute office mail, and various other tasks as needed.

Hau & Associates, S.C. – Administrative Assistant/Human Resources Coordinator January 3, 1993 - August 16, 2008

Duties included dealing with members of the public in person and on the telephone in a polite and calm manner, schedule tax appointments, review time sheets and process payroll based on a biweekly schedule, including quarterly reports and year-end reports. Maintain employee files and benefit information, keep sensitive information in confidence. Review mail and invoices on a daily basis. Print account payable checks, daily upkeep of bank account balances, basic accounting and bookkeeping functions, maintain and order supplies on an as needed basis, accept payment towards customer balances and apply payments appropriately toward customer balances. Initiate and maintain the office policies and procedures manual, daily delivery of outgoing mail to United States Post Office, deliver general ledger and financial statements to clients, and various other tasks as needed.

Additional Skills and Accomplishments

Active Member of Payroll.org (formerly American Payroll Association) Active Member of Greater Milwaukee Payroll.Org Chapter Attendance in Study Group regarding CPP Exam through Greater Milwaukee Payroll.Org Chapter Monthly participation in the Workday Change Ambassador Network meetings City Time Time Entry System and maintenance knowledge Above average knowledge of HCM for payroll entries Billing and Accounts Receivable Processing Class through City of Milwaukee Overview of PACER website through the Wisconsin Bankruptcy Court Knowledge of Wisconsin Department of Revenue My Tax Account program Knowledge of the Electronic Income Withholding Order system regarding child support payments Extraordinary Organizational Skills Exceptional Customer Service Skills Excellent time management and scheduling of daily tasks