

Job Description and Person Specification

Payroll and Pensions Officer

Shared Services Team

Grade: Scale 3

Reporting to: Chief Financial Officer/Finance Manager

The Saint John Southworth Catholic Academy Trust is committed to creating a diverse workforce. We will consider all qualified applicants for employment without regard to sex, race, religion, belief, sexual orientation, gender reassignment, pregnancy, maternity, age, disability, marriage or civil partnership.

Job Description

Key Duties and Responsibilities

- To ensure the effective operation of the Trust's payroll function
- To process payroll for all employees across the Trust, including the preparation and submission of all monthly and end of year statutory returns to His Majesty's Revenue and Customs (HMRC) and relevant pension schemes
- To ensure compliance with current Pay As You Earn (PAYE), National Insurance (NI) and other payroll related legislation and adherence to relevant deadlines
- To ensure accurate processing of monthly payroll to deadlines, liaising with the relevant stakeholders to obtain relevant information on contract changes, absences and variances, via the Trust's payroll system, checking for accuracy
- To complete monthly and annual documentation for HMRC, Local Government Pension Schemes, Teachers' Pensions and audits
- To make manual calculations for pay adjustments where necessary including calculation of under or over payments
- To administer the Trust's employee benefit schemes
- To ensure all payroll and pension transactions are processed to correct Department for Education (DfE) coding criteria to allow accurate and compliant monitoring of income and expenditure
- To ensure the payroll system contains accurate and current rates including pay scales, allowance values, pension deduction rates for employees and employers, NI rates and tax thresholds
- To process all payroll-related Bankers' Automated Clearing System (BACS) payments
- To ensure the accurate processing of pension auto enrolment and opt-out forms for all employees
- To be the first point of contact with staff and the Trust's payroll provider for resolving payroll and pension queries in a helpful, professional and timely manner
- To process payroll journals, departmental recharges, etc. to the nominal ledger in liaison with other members of the Finance Team, part of the Shared Services Team
- To ensure processes, systems and communications on payroll and pensions reflect the changes as a result of legislation, benefits offered, etc.
- To ensure the transfer of payroll services for schools joining the Trust
- To work closely with other members of the Finance Team to reconcile the payroll control accounts on a monthly basis and resolving any reconciliation queries

Corporate Responsibilities

- To contribute to a working environment underpinned by the principles of Catholic Social Teaching
- To ensure probity, propriety and adherence to the Nolan Principles both in personal conduct and throughout the Trust

- To comply with policies and procedures relating to safeguarding and to report any such suspicions, no matter how small, to the Designated Safeguarding Lead or in the case of concerns about a member of staff, the Headteacher
- To comply with all other policies, procedures, working practices and regulations, in particular, Equality and Diversity, Health and Safety, Confidentiality, Data Protection and Financial Regulations in line with our Scheme of Delegation
- To be accountable to and carry out any reasonable request from the Line Manager

Professional Development

- To be committed to their own professional development
- To establish and participate in training opportunities, meetings and networks to support and maintain excellent skills, techniques and knowledge
- To seek feedback and act on it to improve performance within and beyond formal coaching and appraisal opportunities
- To participate in regular in-service training (INSET) as part of CPD

Fluency Duty

In line with Part 7 of the Immigration Act 2016, the Government has created a duty to ensure that all Public Authority staff working in customer facing roles can speak fluent English to an appropriate standard. For this role, the post holder is required to meet the advanced fluency level. The post holder should demonstrate they can:

- Express themselves fluently and spontaneously at length effortlessly
- Explain difficult concepts simply without hindering the natural smooth flow of language
- Take responsibility for promoting high standards of literacy, articulacy and the correct use of standard English in the Trust

We are committed to safeguarding and promoting the welfare of children and we expect all staff to share this commitment. All successful staff will undertake an Enhanced Disclosure and Barring Service Check with Children's Barred List.

This post is exempt from the Rehabilitation of Offenders Act (ROA) 1974. The amendments to the ROA 1974 (Exceptions Order 1975, (amended 2013 and 2020)) provides that when applying for certain jobs, certain spent convictions and cautions are protected and they do not need to be disclosed to employers. If they are disclosed, employers cannot take them into account. Guidance about whether a conviction or caution should be disclosed can be found on the [Ministry of Justice website](#) and further information about filtering offences can be found in [DBS filtering guide](#).

The Trust is committed to making any necessary reasonable adjustments to the job role and the working environment that would enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

Date: November 2025

This job description is illustrative of the responsibility of the post and not necessarily a comprehensive list of tasks.

Post holders are expected to undertake work in line with the level and pay band of the post determined by the Line Manager.

This job description will be reviewed with the post holder in relation to need or on an annual basis through appraisal and whole-Trust review of strategy and effectiveness.

Name: _____

Signature: _____

Date: _____

Person Specification

	Essential Requirements	Desirable Requirements	How Identified
Qualifications	Minimum of five GCSE (A-C/ 4+) including English and Maths or equivalent e.g., Adult Literacy/Numeracy at level 2	Recognised payroll/pension qualification/membership such as the Chartered Institute of Payroll, Pensions and Reward	Application
Experience	- Experience working in a payroll role - Experience processing salary payments, deductions and pension contributions - Experience liaising with external payroll providers - Experience working with finance systems and processing financial transactions	- Experience in a school or education payroll setting - Experience making term time only calculations to pay - Experience using EPM payroll and Access finance systems	- Application - Interview
Knowledge, Skills and Ability	- Knowledge of payroll legislation and statutory payments (e.g. SSP, SMP, SPP) - Understanding of statutory holiday and contractual pay - Ability to interpret and apply payroll and pension regulations - Strong IT skills, particularly Microsoft Excel - Strong organisational and administrative skills - High attention to detail and accuracy	- Familiarity with LGPS and Teachers' Pensions Schemes - Knowledge of DfE financial coding and reporting requirements - Awareness of multi-academy trusts - Awareness of Catholic academy trusts	- Application - Interview - References

	• Ability to manage time effectively and meet strict deadlines • Effective written and verbal communication skills with staff, external contacts and students • Ability to work independently and as part of a team • Awareness of equal opportunities and inclusion in an educational setting		
Character and Values	• High commitment to safeguarding and promoting the welfare of children • Excellent record of attendance and punctuality • Have self-motivation and personal drive to complete tasks to the required timescales and quality standards • Commitment to continuous self-development including undertaking qualifications in key areas		• Application • Interview
Personal Circumstances	• Legally entitled to work in the UK • Ability to perform all duties and tasks with reasonable adjustments, where appropriate, in accordance with the Equality Act 2010		• References • Interview

- Flexibility to support out of hours activity on occasion