

## Financial

### Job Classification

Financial I

Financial II

Financial III

### Pay Grade

5

6

9

### Education/Experience Requirements

Bachelor's Degree in accounting or related discipline

1 year of related experience or equivalent combination of education and experience

Bachelor's Degree in accounting or related discipline

2 years of related experience or equivalent combination of education and experience

Bachelor's Degree in accounting or related discipline

3-5 years of experience including supervisory and senior level work experience

### Common Activities

Compiles and analyzes financial information to prepare account entries

Audits contracts, orders, and vouchers, and prepares reports to substantiate transactions before settlement

Evaluates and resolves various accounting problems and recommends corrective measures

Collects and receives monies and controls deposit of cash reports from departments

Prepares regular and special financial and statistical statements/reports

Prepares audit approach and scope for each audit

Assists in the review and approval of contracts, grants, agreements, and loan documents

Develops audit recommendations for any noted deficiencies to discuss with management

Prepares and authorizes financial statements, cost studies, and analysis

Directs, supervises, and coordinates activities of group/department

Reviews various procedures and practices and recommends appropriate changes to the management

Interprets and implements regulations, policies, and procedures, and resolves related problems

Plans and executes audits. Develops audit recommendations for deficiencies and appraises the adequacy of any corrective action taken

Conducts entrance and exit meetings, and reviews and/or prepares audit work papers and reports

### Organizational Impact

The results of actions may have a measurable impact on operations or finances within a work group.

The results of actions may have a measurable impact on a department's operations. They may also affect the finances of multiple work areas.

The results of actions and decisions may have a significant impact on substantial segments of the University's operations or finances.

### Problem Solving

Performs a variety of duties following established policies and procedures. Problems are generally solved by selecting from approved alternatives based on past practices. Supervision is available to set priorities and objectives, and to assist in problem resolution.

Required to have an understanding of policies and procedures and generally accepted principles. Resolves unique problems by collecting and interpreting information. Solutions may include modifying procedures and methods to address new conditions. Receives advice and input as needed from supervisor.

The job consists of broad responsibilities requiring the application of policies to dynamic and complex conditions. Problems generally require significant analysis and judgment. Solutions may include adapting existing policies and systems to address unique situations.

### Supervision

Interviewing, orientation, scheduling, work assignment and review for temporary employees, students, volunteers, and non-exempt employees.

Interviewing, orientation, training, work assignment and review, input into performance appraisal for temporary employees, students, volunteers, and non-exempt employees.

Interviewing and selection, orientation, training, work assignment and review, performance appraisal, and recommendations for various personnel actions for exempt and non-exempt employees.

### Contact Level

Routinely answers questions and provides information and data requested by individuals within or outside of work area. Questions that require interpretation or are not easily resolved are referred to supervisor.

Interacts with various levels within the University. This interaction may include interpreting and explaining ideas and concepts, as well as solving problems and coordinating projects.

Interacts with various levels within or outside the University including Deans, Directors, and Department Heads. This interaction may include interpreting and explaining ideas and concepts as well as solving problems and coordinating projects.

## Financial Budget

Compiles and tabulates budgetary data, calculates figures and checks for accuracy. Authorized to sign for storeroom supplies and petty cash.

Analyzes budgetary data, verifies figures, identifies/discusses questions or discrepancies, and compares budget proposals with previous years' budgets, grant money, gifts etc. Monitors expenditures against budget, prepares necessary documentation for supervisory review/approval, authorizes requisitions for storeroom supplies, petty cash, limited non-capital purchases, etc.

Prepares and monitors budget, analyzes requisitions for conformance to budget, and compliance with specific requirements (such as for grants, gifts, gov. regulations) and recommends for approval.