**P5: Level Standards**

**GENERAL ROLE**

This level is accountable for serving in an advanced senior resource capacity in an area of specialization.

Incumbents:

* Serve in a subject leader and consultative capacity within an area of specialization.
* Serve in the most advanced capacity and frequently being assigned project leadership roles within a specific administrative/programmatic function or specialty area.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under direction.
* Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

*🡪 Context of Decisions*

* Decisions are driven by office/departmental policy and procedures.

*🡪 Job Controls*

* Free to plan and carry out all phases of work assignments.
* Has the latitude to make daily operational decisions.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Issues tend to be operational in nature.

*🡪 Course of Resolution*

* Identifies issues and gathers facts.
* Must understand the smallest details of an assigned area.

*🡪 Measure of Creativity*

* Problems are not amenable to strict technical resolution, requiring innovative thinking for resolution.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

**SCOPE AND MEASURABLE EFFECT**

* Actions regularly affect a department or a project outcome with department/office impact.
* Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
* Performance results tend to relate to efficiency, fiscal practices and standing, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

**Job Template**

**GENERAL SUMMARY**

Performs complex accounting, auditing, budgeting and other fiscal analyses, in accordance with sound accounting practices and principles; and may be responsible for specified accounting functions. Prepares University financial reports including annual and interim financial statements and periodic capital project reporting.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under limited supervision of a supervisor or manager.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

* Reconciles the activities of the University between accounts and systems. Approves and submits accounting entries.
* Drafts sections of financial statement content and performs detailed review.
* Reviews accounting transactions and makes adjustments as necessary.
* Monitors accounts to identify problems of expenditures or obligations. Monitors and analyzes cash balances and functions.
* Responds to questions from University population regarding financial entries. Serves as a resource to departments in interpreting accounting policies, regulations, and statutes.
* Prepares reports and analyses, including cost analyses, utilizing proper application of accounting policies.
* Audits contracts, orders, and documentation and prepares reports to substantiate individual transactions.
* Coordinates the analysis of financial systems, resolves system problems, and implements changes.
* Lead student employees and staff as assigned.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Master’s degree in accounting.

OR

* Certified Public Accountant (CPA).
* Three to five years of related experience.

OR

* Bachelor’s degree in accounting.
* Five or more years of related experience.

**COMPETENCIES**

**Knowledge of:**

* Accounting practices and principles
* Computer financial reporting systems
* Microsoft Office and related software applications

**Skill in:**

* Planning and organization
* Developing and maintaining effective and appropriate working relationships
* Critical thinking, problem solving and analysis

**Ability to:**

* Perform accounting, auditing, and other financial analyses in accordance with sound accounting practices and principles
* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Reconcile accounts and records
* Monitor accounts to identify problems and make recommendations
* Establish and maintain accounting record and prepare reports
* Maintain the confidentiality of information and professional boundaries
* Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management