**P1: Level Standards**

**GENERAL ROLE**

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence.

Incumbents:

* Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
* Assignments tend to be reoccurring and work outputs generally are delivered in a prescribed form/format.
* May alter the order in which work or a procedure is performed to improve efficiency and effectiveness.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under supervision.
* Progress and outcomes are reviewed for consistency with instructions and established procedures.

*🡪 Context of Decisions*

* Determines the process of how work is to be done based on precedent, practice, and existing policy at the unit/office level.

*🡪 Job Controls*

* Receives some instructions with respect to details of most work assignments.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Course of Resolution*

* Resolutions are typically generated by utilizing existing procedures or practice.
* Typically, problems can be quickly and relatively easily resolved.

*🡪 Measure of Creativity*

* Tasks or activities are reoccurring with emphasis typically on precision and timeliness of execution.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Regularly provides information on finished materials to others.

**SCOPE AND MEASURABLE EFFECT**

* Actions regularly affect an individual, item, event, or incident, etc.
* Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
* Incumbents indirectly promote the general welfare of students, faculty and staff, and safeguard the institution by playing an important role within a process.

**Job Template**

**GENERAL SUMMARY**

Processes and maintains records of all financial transactions for the department including purchasing, travel, billing, payroll, and all other disbursements. This position is also responsible for inventory control, tracking all departmental assets and controllable property.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under 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.*

* Provides financial, administrative, and program support for assigned area.
* Processes daily credit card deposits, credit card credits, cash, and check deposits.
* Monitors, tracks, and maintains accurate financial records. Prepares reports, as needed.
* Submits, reviews, and approves financial and payroll transactions.
* Assists with grant proposal development, post award proposal management, and grant related issues.
* Updates and distributes budget request packages. Creates and disseminates budget reports.
* Manages invoice processing. Verifies purchase orders and available funds.
* Responds to and resolves a variety of financial questions and issues.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Associate’s degree in related field.
* Two to three years of related experience.

*An equivalent combination of education and/or experience may be substituted for the degree and years requirement.*

**COMPETENCIES**

**Knowledge of:**

* Account reconciliation processes
* Financial records system
* Financial regulations for federal and university funds
* Accounting practices and procedures
* 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:**

* Interpret and apply grant and university policies
* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Generate and analyze financial 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