

Job Template: Accountant

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Accounting
Job Title	Accountant
Job Category: P	Job Level: 5
FLSA Status: E	Job Code: B20000

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 Received*

- 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.

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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.

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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.

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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

Job Template: Senior Accountant

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Accounting
Job Title	Senior Accountant
Job Category: P	Job Level: 6
FLSA Status: E	Job Code: B20001

P6: Level Standards

GENERAL ROLE

This level is accountable for serving in a highly advanced capacity in an area of specialization. The advanced resource capacity must be distinct from the regular or most common provision of work within the area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most advanced functions within an area of specialization.

Incumbents:

- Serve in a subject leader and consultative capacity within an area of expertise.
- Set goals and objectives for team members to meet project initiatives and standards.
- Distribute project work.
- Evaluate and monitor the accuracy, quality, quantity, and timeliness to meet project milestones and objects.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- 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 departmental policy and procedures.
- Incumbents understand the smallest details of an assigned area.

→ *Job Controls*

- Free to plan and carry out all phases of work assignments, including the oversight of project staff.
- Has the latitude to make daily operational project decisions.

COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

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- Issues are readily identified but cannot be understood and fixed in simple cause-effect terms.
- Variables affecting the problem are generally known.

→ *Course of Resolution*

- Utilizing an understanding of best practices and the way similar units run elsewhere, convincingly recommends, develops, and implements capital and process improvements to the area.

→ *Measure of Creativity*

- Problems require integrative solutions such as how technologies, processes, resources, and people all fit together

COMMUNICATION EXPECTATIONS

→ *Manner of Delivery and Content*

- Deliver statements and information in a combined persuasive and motivational fashion to subordinate staff, departmental and University administrators, and the campus community as a whole.

SCOPE AND MEASURABLE EFFECT

- Serve as a lead over major projects within a specific administrative/programmatic function or specialty area requiring specialized education.
- Actions regularly affect a department or an office-centric outcome with departmental impact.
- Actions generally have a direct impact on controlling such things as nature of work and scope of services.
- Actions may have high-risk financial, compliance, political or safety implications.
- Performance results tend to relate to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

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FLSA Status: E	Job Code: B20001

Job Template

GENERAL SUMMARY

Performs advanced accounting, auditing, and other fiscal analysis in accordance with sound accounting practices and principles and supervises some accounting functions.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

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.

- Analyzes and prepares the University's financial statements and surveys in accordance with all applicable laws and regulations and with sound accounting practices.
- Monitors accounts to identify problems of expenditures or obligations and determines most suitable accounting procedures for resolving the issue.
- Analyzes variances in balance sheets and revenue and expense accounts between reporting periods; investigates significant or unusual changes and creates reports.
- Identifies and provides resolution to technical accounting and financial issues.
- Recommends and drafts policies and procedures to enhance the internal controls of the department, other departments on campus, and regional campuses.
- Responds to questions and provides analyses and documentation to state, external, and internal auditors.
- Serves as the resource to accounting staff and university departments in interpreting applicable accounting policies and procedures.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Master's degree in accounting.

OR

- Certified Public Accountant (CPA).

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- Five or more years of related experience.

OR

- Bachelor's degree in accounting.
- Seven or more years of related experience.

COMPETENCIES

Knowledge of:

- Generally accepted accounting principles
- Computer financial reporting systems
- Principles and practices of employee supervision
- 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:

- Analyze, compare, and interpret figures and financial data
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Develop and implement accounting policies and procedures
- Prepare comprehensive 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

Job Template: Lead Accountant

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Accounting
Job Title	Lead Accountant
Job Category: P	Job Level: 7
FLSA Status: E	Job Code: B20002

P7: Level Standards

GENERAL ROLE

This level is accountable for serving in an expert resource capacity in an area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most complex functions within an area of specialization.

Incumbents:

- Serve in a subject leader and consultative capacity within an area of expertise.
- Provide analytical, technical, and advisory support to leaders and decisions makers within the same disciplinary track.
- Lead projects or initiatives within the specific area of expertise, to include leading vendors or cross-functional departments or teams.
- Research and apply better ways to effectively achieve end results by, for example, arranging/rearranging the way work is performed, changing elements of processes, and adding or deleting new or unnecessary capabilities/functionalities as needed.
- Set project objectives, immediate- and/or long-term, as a means to fulfill project initiatives.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received

- Works under general direction.
- Seeks assistance only when unique situations arise, coupled with financial impact to the division and political consequence.

→ Context of Decisions

- Work is focused on and regulated by specific department/division goals and milestones.

→ Job Controls

- Act based on own judgement as long as actions adhere to division policies and operating procedures, and remain focused on the department and division objectives and missions.
- Subject to managerial controls through conferences, review of reports, and occasional on-site visits or check-ins.

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- Managerial controls are exercised on the incumbent for matters of intermediate- and long-range planning, budgetary, and human resources based matters.

COMPLEXITY AND PROBLEM SOLVING

→ Range of issues

- Problems are unique and unexpected.
- Challenges for problems arise due to lack of precedent.

→ Course of Resolution

- Problems require response/adaptation to changing conditions or circumstances, necessitating enterprise and new approaches with broad impacting effects.
- Problem resolution should regularly require collaboration and coordination with units internal to the division, with occasional collaboration and coordination outside the division.

→ Measure of Creativity

- Incumbents are regularly required to develop new methods/methodology for evaluation and implementation plans for new initiatives.

COMMUNICATION EXPECTATIONS

→ Manner of Delivery and Content

- Deliver statements and information in a combined persuasive and motivational fashion to subordinate staff, departmental and University administrators, and the campus community as a whole.

SCOPE AND MEASURABLE EFFECT

- Serve as an expert on specific subject matter evidenced by regularly researching and producing reports (e.g., white papers) on technical matters of systematic importance and consulting with managers throughout the division/University on specific issues in the position's area of expertise.
- Actions regularly affect a departmental outcome with division-wide impact.

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- Actions have a direct impact on controlling such things as project scope, team size and nature of assignments, operating budget, etc.
- Actions may have high-risk financial, compliance, political, or safety implications.
- Performance results tend to be related to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc. Incumbents' actions have a direct impact on controlling such things as project scope, team size and nature of assignments, operating budget, etc.
- Incumbents' actions may have high risk financial, compliance, political or safety implications
- Performance results tend to be related to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

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Job Template

GENERAL SUMMARY

Manages aspects of a functional area of the Accounting Office such as financial reporting/general accounting, project accounting, or inventory control/capitalization. Oversees the production of University financial reports including annual and interim financial statements, ensuring compliance with policies, procedures, regulations, and statutes.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under direction of a manager. Serves as a lead to professional and non-professional staff, as well as over business and/or administrative operations of a moderate sized department of cross-disciplinary services.

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.

- Oversees the activities of the Accounting Office to ensure compliance with sound accounting standards and applicable policies, regulations, and laws.
- Leads assigned personnel by assigning and reviewing work and providing guidance.
- Acts as the point of contact for state, federal, internal, and external auditors to provide information, answer inquiries, provide documentation, and resolve audit issues.
- Participates in developing the priorities, departmental policies, procedures, and financial planning as part of the leadership team.
- Assists in the development, coordination, and monitoring of University financial reports and funds. Resolves University wide financial issues.
- Serves as the resource to accounting staff, university departments, and others in interpreting all applicable accounting policies, procedures, federal regulations, and state statutes.
- Identifies and provides resolutions to technical accounting and financial issues. Prepares or supervises the preparation of comprehensive reports and analyses for decision-making or to advise University offices, as needed.
- Serves as a member of departmental, divisional, and University committees. Represents the unit on cross-departmental projects including major software implementations.

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- Performs related work as required.

MINIMUM QUALIFICATIONS

- Master's degree in accounting.

OR

- Certified Public Accountant (CPA).
- Seven years of related experience.

OR

- Bachelor's degree in accounting.
- Ten or more years of related experience.

COMPETENCIES

Knowledge of:

- Generally accepted accounting principles and financial management
- Principles and practices of employee supervision
- Accounting for higher education
- Federal and state accounting regulations
- Financial reporting, general ledger, and report writing
- 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:

- Develop accounting policies and procedures, develop priorities within established guidelines, and manage and evaluate accounting projects
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds

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- Prepare comprehensive reports
- Analyze, compare, and interpret figures and financial data
- 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