**P2: 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.
* Tend to have assignments that are reoccurring and work outputs generally are delivered in a prescribed form/format.
* Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
* May recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under general supervision.
* Periodic checks on accuracy, quality, and timeliness of outcomes.

*🡪 Context of Decisions*

* Independently develops how work is to be done based on precedent, practice, and existing policy at the unit/office levels.

*🡪 Job Controls*

* Possess the latitude to adjust the work processes or methods to effectively and efficiently manage their work assignments.
* Guided by general procedures and professional norms.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Problems tend to be modestly technical or operational.

*🡪 Course of Resolution*

* Performs comparisons, verifications, reconciliations, compilations, etc. and such of data, program or student services/practices, or operational/staff output.
* Understands the end product/outcome and where to send and receive information and materials to fulfill the assigned responsibilities.

*🡪 Measure of Creativity*

* Once problems are identified, solutions generally can be resolved using conventional or standard procedures.
* Most of the obstacles, issues, or concerns can be handled with established practice and policy.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Regularly provides information on finished materials to others.

**SCOPE AND MEASURABLE EFFECT**

* Actions typically 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**

Provide a broad range of financial and budgeting services with a focus on processing financial and administrative transactions, as well as maintaining a complete set of records for a department/division.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under general 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.
* Monitors fiscal procedures for duplication, efficiency, effectiveness, and compliance with required policies and regulations, making modifications as needed.
* Prepares regular financial statements of condition for each unit or cost center and makes available timely and accurate financial information, including budget projections and analysis.
* Assists in developing and managing department/division budgets and in maintaining budgetary control over approved budget.
* 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**

* Bachelor’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
* Budget preparation and fiscal control methods
* 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
* Analyze and modify fiscal procedures
* 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