

Financial Services Specialist

Working Title:	Financial Services Specialist
Job Family:	Finance
Proposed Classification Title:	TBD
Proposed Pay Grade:	509 – 513 (Merit Pay Grade) P31 – P34 (P&S Pay Grade)
Job Category	Merit Professional & Scientific

Minimum Qualifications:

TBD – dependent on job classifications selected.

Summary:

Facilitates value-added accounting and non-grant financial support to units. Works in support of units to prepare or make changes to costing allocations, correcting journals for payroll and non-payroll entries, and other accounting support as needed. Provides customer service to units with financial reporting and transactions. Ensures accounting and reporting compliance and financial oversight.

Example of Duties:

- Provides exceptional customer service to units as it relates to financial services such as payroll adjustments, costing allocations, financial accounting, and financial reporting.
- Works with units regarding all financial activities and reporting for individual cost centers.
- Works proactively with units to identify needs such as running reports, providing information, and ensuring adherence to standard processes and procedures.
- Initiates accounting journal entries needed to maintain accurate cost center, business unit, and institutional financial records.
- Runs reports and provides financial information to unit level fiscal managers upon request or on a schedule.
- Answer questions and resolves issues regarding financial transactions and reporting, including but not limited to updating payroll allocations, costing allocations, taking corrective action, etc.
- Ensures compliance with policies, procedures, federal and state regulations, etc.
- Interfaces and collaborates with central finance and university departments on complicated procurement/travel needs.
- Works with SPA on policies and procedures affecting salary corrections.
- Assist units with understanding complicated accounting issues.

Preferred Qualifications:

- Demonstrated experience in the management of financial transactions.

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- Demonstrated ability in providing strong, consistent customer service to a wide variety of customers.
- Experience working and collaborating with multiple stakeholders.
- Comprehensive understanding of local, state, and federal regulations.
- Strong communication skills, with an ability to function and succeed in a dynamic environment.

Expected Competencies:

- **Collaboration** – works effectively and constructively with others; shares time, energy and knowledge with others to ensure they can succeed.
- **Relationship Building** – maintains and fosters relationships within, across, and external to organizational boundaries.
- **Inclusion** – demonstrates awareness and respect of cultural and individual values; appreciates and leverages the strengths of others to accomplish goals.
- **Problem Solving** – applies critical-thinking skills to solve problems by generating, evaluating, and implementing positive solutions.
- **Effective Communicator** – provides regular, consistent, and meaningful information; listening carefully to others and ensures messages are understood.
- **Results Oriented** – consistently delivers desired results through consistent, quality service that meets mission goals and customer service standards.