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.
Financial Services Specialist

- 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.