



Job Description

(For Positions in CAW Local 555, Unit 1)

Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.

JD #:	JD00654	Pay Grade:	7
JD Title:	Financial Coordinator (II)	JD FTE Hours:	35
Job Family:	Accounting		

General Description

Responsible for applying specialized knowledge and understanding of financial policies and procedures to coordinate and process University financial transactions. Analyzes, records, classifies, and summarizes accounting data according to established procedures. Ensures accuracy and compliance with existing guidelines, policies, and procedures. Provides lead hand supervision to other staff.

Representative Duties & Responsibilities

- Coordinate the collection, verification, analysis and reporting of financial data.
- Interpret and communicate applicable financial policies, procedures and guidelines to others.
- Assist with internal and external audits by preparing audit files and responding to auditor inquiries.
- Develop and deliver training and information sessions.
- Analyze data and assess for reasonableness.
- Develop budgets for review and approval.
- Implement and maintain budgets. Create financial projections and make adjustments to budgets throughout the fiscal year.
- Exercise appropriate controls, monitor, and reconcile accounts.
- Write a variety of document and reports such as procedure manuals, accounting reports, and financial statements.
- Perform various analyses and reconciliations of accounts.
- Generate reports and account statements and review for accuracy.
- Provide training and guidance to others on relevant accounting procedures and the use of financial systems.
- Calculate, prepare and issue invoices, cheques, account statements and other financial statements according to established procedures.
- Receive, send, sort, verify, process and prepare various documents such as purchase orders, invoices, cheque requisitions, receivables, and payables.
- Process, verify, and balance financial records and business transactions, such as accounts payable, accounts receivable, and payroll.
- Investigate discrepancies using established procedures.
- Monitor and reconcile statements and participate in the reconciliation of accounts.
- Prepare and generate a variety of scheduled and ad hoc reports.
- Update, maintain, and verify information in a variety of spreadsheets and databases.
- Balance and control cash receipts, including floats, petty cash and cheques.
- Apply standard mathematical skills such as calculations, formulas, and equations to perform a variety of calculations.
- Create spreadsheets including complex formulas and equations.
- Answer complex inquiries via telephone, email, and in person that are specific in nature and require a specialized knowledge of policies and procedures.
- Maintain filing systems, both electronic and hard copy.

Supervision

- Provides lead hand supervision and is responsible for the quality and quantity of work of others.

Qualifications

- 2 year Community College diploma in Accounting or a related field of study.
- Requires 5 years of relevant experience.

Effort

Physical Effort:

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
 - Intermittent periods of keyboarding to word process documents and validate data.
- Elements of moderate physical effort are not a regular feature of this job.
- Elements of high physical effort are not a regular feature of this job.

Mental Effort:

- A typical work day consists of up to 2 hours of routine mental effort for activities such as:
 - Collecting routine information, writing a variety of formal notes and records, and entering data into a variety of spreadsheets and databases.
- A typical work day consists of greater than 3.5 hours of moderate mental effort for activities such as:
 - Coordinating the collection, verification, analysis and reporting of financial data.
 - Communicating applicable financial policies, procedures and guidelines to others.
 - Preparing audit files and responding to auditor inquiries.
 - Developing and delivering training and information sessions.
 - Implementing and maintaining budgets. Creating financial projections and making adjustments to budgets throughout the fiscal year.
- A typical work day consists of up to 2 hours of high mental effort for activities such as:
 - Analyzing data and assessing for reasonableness.
 - Interpreting financial policies, procedures and guidelines.

Working Conditions

Physical Environment:

- There are no adverse physical environment conditions inherent to the job.

Psychological Environment:

- Occasionally interacts with individuals who may be rude or upset.
- Frequently handles competing requests and simultaneous deadlines.

Health & Safety:

- Risk to the incumbent is no higher than for the general population.

Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	JD00654	Pay Grade:	7
JD Title:	Financial Coordinator (II)	Total Points:	457
Job Family:	Accounting		

Factor	Subfactor	Level Rating	Points
Skill	1. Applied Reasoning and Analytical Skills	4.0	83
	2. Breadth of Knowledge	2.0	13
	3. Adaptation to Change/Updating of Learning	2.0	12
	4. Interpersonal Skill	3.0	39
	5. Education and Experience	D4	64
	6. Dexterity and Coordination	2.0	12
Effort	7. Physical Effort	1.0	3
	8. Mental Effort	3.0	55
Responsibility	9. Planning and Coordination	2.5	37
	10. Responsibility for Others	3.0 ^{Lead}	55
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	3.0	66
Working Conditions	12. Physical Environment	1.0	3
	13. Psychological Environment	2.0	10
	14. Health and Safety	1.0	5