Financial Support Associate

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Job Family

Finance and Business: Provides the University with critical information regarding the University’s operational, financial, and academic performance. Manages and ensures the financial compliance of the University’s finances. Prepares University budgets. Assists leadership in strategic planning. Prepares required reports for external parties.

Sub Family

Financial Support: Provides front-line support to customers for the finance department. Researches, interprets, analyzes, and translates information in different formats to accommodate a variety of customer needs. Creates customer reports for finance managers.

Job Responsibilities

- Guides and assists customers with non-routine questions that require interpretation of complex policies and requirements such as issues regarding their accounts.
- Performs finance and business activities under general supervision.
- Provides financial support to areas within the University.
- Receives and processes financial aid applications. Creates reports related to daily activities and transactions. Maintains information for journal entries.
- Generates invoices related to receivables. Collects payments. Processes deposits and posts them to correct accounts. Codes donations.
- Processes financial transactions for student organizations.
- Maintains and reconciles data within relevant systems.

Role

- Works under limited supervision in performing job responsibilities.
- Applies technical or process knowledge; requires capacity to understand specific needs or requirements to apply skills/knowledge.
- May supervise or oversee the work of student employees.

Impact and Complexity

- Performs job responsibilities working within guidelines or traditional practice. May organize, set priorities, schedule, and review work of student workers or volunteers. Exercises judgment in prioritizing, planning, and organizing own work within time,
process, and results requirements; has some flexibility to modify workflow based on need and circumstances.

- Decisions made address non-routine questions and situations, often requiring investigation and/or research of precedents. Demonstrates ability to triage conflicting priorities and handle sensitive situations with tact and diplomacy.

Requirements

Knowledge of standard finance and business policies, procedures, services, tools, and/or equipment in a field of specialization typically obtained by a high school degree or GED or equivalent and a minimum of 2 years of related experience. An equivalent combination of education, training, and experience is acceptable. Specific knowledge, certifications, and licensure will apply at the position level.

This job specification describes the general nature and level of work being performed by people assigned to this classification. Employees may perform some or all of these duties. Examples listed do not preclude the performance of other duties similar in nature or in level of complexity.