

## FINANCIAL SERVICES SPECIALIST I

**DISTINGUISHING FEATURES OF THE CLASS:** This position involves the responsibility of assisting component school district administrators and support personnel with the efficient management of financial services. The work involves the responsibility for providing assistance with the coordination and delivery of the specialized technical support of financial management services. Incumbents are responsible for on-site and phone support in applying the specialized understanding and delivery of financial applications including general ledger, accounts payable, payroll, and project management. This position resides in the Financial Services Department within the Mid-Hudson Regional Information Center (MHRIC). This position differs from the Financial Services Specialist II by virtue of not having the responsibility of project management duties. The work is performed under the general supervision of the Financial Services Manager with leeway allowed for exercising independent judgment in carrying out the details of the work. Supervision is not a function of this class. Does related work as required.

**TYPICAL WORK ACTIVITIES:** The typical work activities listed below, while providing representative examples of the variety of work assignments in the title, do not describe any individual position. Incumbents in this title may perform some or all of the following, as well as other related activities not described.

Trains new and/or experienced school district administrators and support personnel in the use of computerized financial and office automation applications;

Prepares appropriate documentation for applications, including processing accounting or payroll production for the districts;

Serves as liaison for financial and office automation applications for school districts;

Provides telephone support, troubleshoots problems and offers support in any of the financial applications offered;

Coordinates a user group for sharing common problems and solutions;

Consults with school district administrators and support personnel on the development, maintenance and effectiveness of applications;

Recommends system modifications or revisions to vendors and MHRIC staff;

Prepares materials for meetings and training sessions that support application requirements;

Works with Regional Information Center staff to improve current services, and develop new web-based services;

Trains Regional Information Center personnel on applications.

**FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:** Good knowledge of computer software applications supported by the Regional Information Center; working knowledge of the organizational functions, policies and regulations of a regional information center and component school districts; working knowledge of computerized financial record keeping and current windows-based and web-based office

applications; working knowledge of computer hardware and software technology; ability to perform a range of troubleshooting tasks; ability to problem-solve computer user related problems relative to software technology; ability to establish and maintain cooperative relations with others; ability to communicate effectively both orally and in writing; poise, tact, honesty and sound judgement; physical condition commensurate with the duties of the position.

**MINIMUM QUALIFICATIONS:** Either:

- A. Graduation from a New York State registered or regionally accredited college or university with a Bachelor's Degree, which included or was supplemented by fifteen (15) credit hours\* in Accounting, Business, Computer Science, Information Resources Management, Information Technology, Management Information Systems or closely related field and one (1) year (full-time paid, or its' part-time equivalent) experience in using a computerized financial system; **OR**
- B. Graduation from a New York State registered or regionally accredited college or university with an Associate's Degree, which included or was supplemented by fifteen (15) credit hours\* in Accounting, Business, Computer Science, Information Resources Management, Information Technology, Management Information Systems or closely related field and three (3) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which includes one (1) year of experience in applying technology training and/or support by phone or on-site to users; **OR**
- C. Successful completion of fifteen (15) credit hours\* in Accounting, Business, Computer Science, Information Resources Management, Information Technology, Management Information Systems or closely related field offered by a technical training institute, college or a corporate training program and four (4) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which includes one (1) year of experience in applying technology training and/or support by phone or on-site to users; **OR**
- D. Graduation from high school or possession of a high school equivalency diploma and five (5) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which includes (2) years of experience in applying technology training and/or support by phone or on-site to users; **OR**
- E. An equivalent combination of training and experience as indicated above.

\*Coursework in the use of specific programs such as WORD, EXCEL or ACCESS and data entry is not acceptable.

**Special Requirement:** Possession of a valid New York State driver's license appropriate to the vehicles operated or otherwise demonstrate their ability to meet the transportation needs of the job.

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