

## FINANCIAL SERVICES SPECIALIST II

**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 assisting the Financial Services Manager 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 I by virtue of 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.

Specializes in training new and/ or experienced school district administrators and support personnel in the use of computerized financial administration services which may include general ledger, accounts payable, payroll, office automation and project management;

Acts as project manager and coordinator for the installation of financial management applications and identifies the need for training (both initial and ongoing);

Prepares appropriate documentation for applications;

Organizes and conducts marketing presentations to interested groups in the component school districts;

Trains Regional Information Center personnel on applications;

Provides assistance to the school districts in the selection, configuration, and installation of required hardware to run financial management applications;

Coordinates a user group for the sharing of common problems and solutions;

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

Serves as liaison to school districts for all questions relating to financial applications;

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

Recommends system modifications or revisions to both vendors and MHRIC staff;

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

Works with Regional Information Center staff to improve current services, as well as to develop new services, especially as they relate to web-based software applications;

Guides other administrative specialists with their tasks.

**FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:** Good knowledge of computer software applications supported by the Regional Information Center; good knowledge of the organizational functions, policies and regulations of a regional information center and component school districts; good knowledge of computerized financial record keeping and current windows-based and web-based office applications; working knowledge of computer hardware and software technology; good marketing skills; ability to communicate effectively both orally and in writing; ability to plan, organize, and manage projects; ability to problem-solve computer user related problems; ability to establish and maintain cooperative relations with others; ability to understand and carry out complex oral and written instructions; 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 two (2) 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**
- 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 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**
- 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 five (5) 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 diplomas and six (6) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which includes (3) 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.

ULSTER COUNTY  
3153 FIN SPC II  
Classification: Competitive  
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Adopted: December 22, 2003