Accounting Technician - Temporary

**POSITION INFORMATION**

**Type of Action Requested:** New (Create a new Position Description)

**Internal Team:** SL-FacMgmt-FMD Cust&Business Svcs-127902

**Job Code/Employee Classification:** Accounting Technician I

**Classification Title:** Accounting Technician I

**MPP Job Code:**

**Position Number:** New Position # Request

**CSU Working Title:** Accounting Technician - Temporary

**Salary Range/Grade:** 1730-RANGE A-Grade-1

- Minimum: $2,710.00
- Maximum: $4,906.00

**Reports To:** Dir Customer & Business Svcs

**Campus:** San Luis Obispo

**Division:** Administration and Finance

**College/Program:** Facilities Management and Dev

**Department:** FacMgmt-FMD Cust&Business Svcs - 127902

**FLSA Status:** Non-Exempt

**SENSITIVE POSITION**

**Sensitive Position:**

- Yes
- No

**Job Summary/Basic Function:** Facilities Management and Development (FMD), a unit within the Administration and Finance Division (AFD), is responsible for the planning, design, construction, operations, maintenance, and repair of university facilities and grounds. FMD consists of five critical and interdependent support departments, including Facilities Customer & Business Services; Energy, Utilities, & Sustainability; Environmental Health & Safety; Facilities Planning & Capital Projects; and Facility Operations. In support of the Cal Poly mission, the Facilities and Management and Development department is committed to promoting a culture that values individual and organizational integrity, civility, and diversity.

Under the general direction of the Director Customer Business Services, the Accounting Technician will apply knowledge of recordkeeping methods, procedures, and practices with assisting with the review, processing of Facilities Management and Development invoices. This position will provide assist in compiling various documents and reviewing for accuracy; make mathematical calculations; update and maintain spreadsheets including entering, sorting, calculating; run and export queries; provide input to the modification and documentation of established procedures based on precedent and University policies; maintain files and records; and reconcile account balances.

**Minimum Qualifications:** Equivalent to graduation from a four-year college or university AND one year of clerical accounting or financial record-keeping experience which has provided the above knowledge and abilities.
Required Qualifications:

- Strong analytical skills with the ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
- Expertise in investigating and analyzing problems with a broad administrative impact and implications. Ability to anticipate problems and address them proactively.
- Thorough knowledge of budget policies and procedures.
- Working knowledge of basic methods and procedures for research and statistical analysis and the ability to apply them.
- Thorough knowledge of operational and fiscal analysis and techniques including the ability to interpret legal policy, laws, regulations, and guidelines to form or restructure business processes.
- Ability to take initiative and independently plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved.

- Demonstrated ability to clearly present ideas, and train individuals and groups of employees, which may include the preparation of training documentation.
- Skills in research, development, and evaluation of policies and programs, including skills in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.
- Excellent organizational and time management skills with the ability to maintain a high degree of accuracy while setting own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
- Demonstrated ability to use a variety of computer applications including word-processing, spreadsheets, databases, online systems, and internet as well as online calendaring and email.
- Demonstrated ability to maintain a high degree of confidentiality.
- Working knowledge of or ability to quickly learn University infrastructure, policies, and procedures.
- Demonstrated ability to use tact, diplomacy, and professionalism to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
- Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
- Excellent communication skills with an ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
- Thorough mastery of English grammar, spelling, and punctuation with a demonstrated ability to proofread and edit.
- Ability to maintain records, retrieve data, prepare, and present complex reports using computerized recordkeeping systems and databases.

Preferred Qualifications:

- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience in using financial management systems such as PeopleSoft.
- Working knowledge of utility use, distribution, trend analysis and cost recovery.

Special Conditions:

- Must be able to work accurately and efficiently in an area with constant interruptions.
- Temporary
License / Certification: Possession of a valid driver's license or the ability to obtain by date of hire.

Mandated Reporter: Limited - The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

NCAA: Yes  No

Conflict of Interest: None

Supervises Employees: Yes  No

Job Duties

JOB DUTIES

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<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
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<tr>
<td>90</td>
<td>Review financial documents for accuracy, completeness, validity, and adherence to standards.</td>
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<td>Compute and post numbers rapidly and accurately.</td>
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<td>Maintain files and records; identify, trace, and correct errors.</td>
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<td>Interpret and apply written rules and regulations.</td>
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<td>Assist in invoice processing for projects, department budgets, equipment, and staff reimbursements.</td>
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<td>Ensure that all financial transactions are processed accurately, correctly, and in a timely manner utilizing appropriate funding sources.</td>
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<td>Assist in analyzing invoices for rate accuracy and scope and ensure that previous payments and remaining balances correspond with accounting records.</td>
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<td>Assist in reconciling and developing reports for FMD projects.</td>
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<td>Support monthly billing for recharge work and provide expertise to Facilities management and staff regarding the validity of billing types for various uses.</td>
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<td>Assist in updating the work management system with Help Center to update data to be correct. Verify reversals are being charged correctly.</td>
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<td>Run and analyze audits to validate data and ensure billing accuracy; ensure that the correct overhead is applied and the right chart field string (fund/cost center/account/project) is used; auxiliary organizations are not receiving state-supported work without being charged; and review chart field string combinations to ensure validity.</td>
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<td>Provide management with ad-hoc reports and research projects.</td>
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<td>Provide business service and financial information to campus customers upon request.</td>
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| 10        | Perform other job-related duties and special projects as assigned. | Marginal                |
|           | Maintain skill currency as appropriate to safely and effectively complete assignments. |                        |
|           | Back-up support other areas of Facilities Customer and Business Services. |                        |

SELECTION CRITERIA

There are no items to show
POSTING DETAILS

Advertising Summary: The Facilities Management and Development (FM&D) organization is a unit within the Administration and Finance division and is responsible for the management, operations, and development of facilities on the university campus. We are currently looking for a qualified Temporary 1 year Accounting Technician to join our team!

Advertisement text:

Job Summary

Under the general direction of the Director Customer Business Services, the Accounting Technician will apply knowledge of recordkeeping methods, procedures, and practices with assisting with the review, processing of Facilities Management and Development invoices. This position will provide assist in compiling various documents and reviewing for accuracy; make mathematical calculations; update and maintain spreadsheets including entering, sorting, calculating; run and export queries; provide input to the modification and documentation of established procedures based on precedent and University policies; maintain files and records; and reconcile account balances. Temporary 1 Year.

Department Summary

Facilities Management and Development (FMD), a unit within the Administration and Finance Division (AFD), is responsible for the planning, design, construction, operations, maintenance, and repair of university facilities and grounds. FMD consists of five critical and interdependent support departments, including Facilities Customer & Business Services; Energy, Utilities, & Sustainability; Environmental Health & Safety; Facilities Planning & Capital Projects; and Facility Operations. In support of the Cal Poly mission, the Facilities and Management and Development department is committed to promoting a culture that values individual and organizational integrity, civility, and diversity.

Key Qualifications

- Strong analytical skills with the ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
- Expertise in investigating and analyzing problems with a broad administrative impact and implications. Ability to anticipate problems and address them proactively.
- Thorough knowledge of budget policies and procedures.
- Thorough knowledge of basic methods and procedures for research and statistical analysis and the ability to apply them.
- Working knowledge of operational and fiscal analysis and techniques including the ability to interpret legal policy, laws, regulations, and guidelines to form or restructure business processes.

Education and Experience

Equivalent to graduation from a four-year college or university AND one year of clerical accounting or financial record-keeping experience which has provided the above knowledge and abilities.

Salary:

Anticipated Hiring Range: $3,000 - $3,600 per month

Classification Range: $2,710 - $4,906 per month

Cal Poly

Known for its Learn by Doing pedagogy, Cal Poly is the flagship of the world-renowned California State University system. Annually recognized as one of the top public universities in the nation, Cal Poly continues to offer an academic curriculum based on learned experience gained through real-world practice. Located in San Luis Obispo, Cal Poly is nestled comfortably among the coastal foothills, minutes from the Pacific Ocean and equidistant to the Bay Area and Los Angeles.

Cal Poly offers a best-in-class benefits program, including health, dental and vision insurance, retirement participation in the Public Employees’ Retirement System, and educational benefits for eligible employees. See our benefits website for additional information.
Diversity Statement

At Cal Poly, we believe that cultivating an environment that embraces and promotes diversity is fundamental to the success of our students, our employees and our community. Bringing people together from different backgrounds, experiences and value systems fosters the innovative and creative thinking that exemplifies Cal Poly's values of free inquiry, cultural and intellectual diversity, mutual respect, civic engagement, and social and environmental responsibility.

Cal Poly's commitment to diversity informs our efforts in recruitment, hiring and retention. California Poly is an affirmative action/equal opportunity employer.

Supplemental Information

Following a conditional offer of employment, a background check (including a criminal records check) must be completed satisfactorily before any candidate may start work with Cal Poly. Failure to satisfactorily complete the background check may result in the withdrawal of the offer of employment. Current employees who are offered positions on campus will be required to undergo a background check for any position where a background check is required by law or that Cal Poly has designated as sensitive.

The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

This position may be "Designated" under California State University's Conflict of Interest Code. This would require the filing of a Statement of Economic Interest on an annual basis and the completion of training within 6 months of assuming office and every 2 years thereafter.

Cal Poly, San Luis Obispo is not a sponsoring agency for staff positions (i.e. H1-B visas).