Classification Description

University of Michigan

Issued: 09/01/01

Classification Code # 242551

Supersedes: New

FLSA NE

TITLE: FINANCIAL ASSOCIATE **GRADE: MS1**

BASIC FUNCTION AND RESPONSIBILITY

To perform office work including routine and complex administrative tasks, abstract and prepare non-standardized reports, participate in the development and revision of office procedures, and coordinate office services.

CHARACTERISTIC DUTIES AND RESPONSIBILITIES

Answer telephones and respond to inquiries requiring interpretation of University and School policies.
Enter financial information on databases and maintain unit statistical data.
Make travel arrangements, hotel accommodations and prepare itineraries.
Maintain office supplies and request additional items as needed.
Type and file various types of correspondence.
Screen, sort and distribute mail.
Maintain electronic calendars for staff and/or managers.
Monitor and reconcile operating, grant, payroll and research chartfield combinations.
Review transactions for accuracy.
Transfer funds to appropriate chartfield combinations.
Prepare, generate and distribute special and periodic activity reports including meeting materials.
Identify the need for and participate in the development of office procedures.
Coordinate services for the Financial Services Office.

PERSONAL CONTACT

Personal interaction involves obtaining and providing information and explaining established policies and procedures, giving and receiving of advice or opinions where application of judgment or expertise in an area of knowledge, methods or practice is required. Contacts are often somewhat stressful due to the need for an immediate and accurate judgment concerning a course of action.
Contacts typically include faculty, staff, department heads, students and the public on a daily basis.

SUPERVISION RECEIVED

General supervision is received from a designated official. Staff members in this classification may receive minimal supervision and are expected to exercise considerable judgment on matters involving the application of established policies, methods or procedures.

This description is intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct, and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of a similar kind or level of difficulty.

SUPERVISION EXERCISED

Work coordination may be exercised over one to five regular or temporary office staff.

QUALIFICATIONS

High school diploma or an equivalent combination of education and experience is necessary; an Associate degree in general business, accounting or a related field is desirable.
Reasonable experience performing office work is necessary.
Knowledge of University and department policies and procedures is necessary.
Ability to type 60-80 wpm with accuracy is necessary.
Thorough procedural knowledge of the operation and application of automated office text and data processing systems is necessary.

View Salary Range:
http://www.med.umich.edu/medschool/staff/salaryrangesb.html

This description is intended to indicate the kinds of tasks and levels of work difficulty that will be required of positions that will be given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of any supervisor to assign, direct, and control the work of employees under his supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of a similar kind or level of difficulty.