



West Valley-Mission
Community College District

CLASS SPECIFICATION

FINANCIAL TECHNICIAN I/II/III

Classified Position (Non-Exempt Status)

Classified Office, Technician & Business Services Salary Schedule –

Level I: Range 59 / Level II: Range 62 / Level III: Range 65

DEFINITION

To perform a variety of complex and technical duties in the preparation and maintenance of assigned financial accounts; to prepare, review, and process documents, records, and reports related to area of assignment; and to provide technical assistance to district staff.

DISTINGUISHING CHARACTERISTICS

Financial Technician I – This is the entry-level class in the Financial Technician series. Employees in this class typically have minimum experience and work under immediate supervision while learning and performing the job, progressing to general supervision as procedures and processes of assigned area of responsibility are learned. The level I class is distinguished from the level II by the performance of less than the full range of duties assigned to the level II.

Financial Technician II – This is the journey level class in the Financial Technician series. Employees in this class have well-established work experience and are assigned the full range of duties. Incumbents receive only general supervision or assistance as new, unusual or unique situations arise, and are fully aware of the operating procedures and policies within the job classification and the unit.

Financial Technician III – This is the senior-level class in the Financial Technician series and is distinguished from levels I and II by the level of responsibility assumed, including providing support and training to other staff. Employees at this level are expected to have a full understanding of policies and procedures related to the assigned area of responsibility and receive minimal supervision.

Positions in this class series are flexibly staffed and normally filled by advancement from the previous level in the series. Advancement from one level to the next level in the series can only occur once the

manager has determined that the employee meets the qualification standards for the next level. The manager's recommendation for advancement will be based on the satisfactory performance of assigned duties and responsibilities.

SUPERVISION RECEIVED AND EXERCISED

Financial Technician I

Receives immediate supervision from assigned supervisor; and may receive training and support from higher level staff.

Financial Technician II

Receives general supervision from assigned supervisor; and may receive training and support from higher level staff.

Financial Technician III

Receives minimal supervision from assigned supervisor; and may receive training and support from higher level staff and may provide training and support to assigned staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Financial Technician III

Plan, prioritize, and coordinate work in the financial services functional area; develop schedules and methods to accomplish assignments ensuring work is completed in a timely and efficient manner.

Financial Technician Levels I, II and III

Review, adjust, and record financial data related to area of assignment; detect and correct discrepancies; enter data into relevant databases or computerized systems; generate records and reports.

Monitor, audit, balance, and maintain a variety of accounts; identify and correct out-of-balance conditions; maintain related financial records.

Review, process, and disburse refunds and disbursements for assigned functions.

Research, compile, and prepare a variety of periodic and special reports related to area of assignment.

Review various documents and reports for accuracy, completeness, and compliance with district policies, laws, and other regulations.

Compile, calculate, organize, and record payments, deductions, transfers and journal entries.

Maintain accurate and comprehensive filing system of documents for research and audit purposes.

Prepare bank deposits and manage cash; post receipts and disbursements.

Build and maintain positive working relationships with co-workers, other district employees, and the public using principles of good customer service.

Foster an environment that embraces diversity, integrity, trust and respect.

Be an integral team player, which involves flexibility, cooperation and communication.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Financial Technician I

Knowledge of:

Principles and practices of financial accounting.

Methods, practices and terminology of financial record keeping.

Ability to:

Provide information and assistance to district staff regarding practices and procedures of assigned area.

Learn and perform complex technical accounting duties related to area of assignment.

On a continuous basis, know and understand operations. Intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.

On a continuous basis, sit at desk for long periods of time. Intermittently, twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Maintain detailed and accurate records.

Compile and reconcile numerical and financial data.

Use sound judgment in recognizing scope of authority.

Operate and use modern office equipment including computers and applicable software.

Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Utilize appropriate safety procedures and practices for assigned duties.

Communicate effectively orally and in writing.

Relate effectively with people of varied academic, cultural and socio-economic backgrounds using tact, diplomacy and courtesy.

Establish and maintain effective, cooperative, and collaborative working relationships with others.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

One year of responsible financial or bookkeeping experience is desirable.

Education:

Equivalent to an associate's degree from an accredited college with major coursework in accounting, bookkeeping, or a related field.

Financial Technician II

Knowledge of:

Applicable federal, state, and local laws, regulations and reporting requirements.

Automated financial systems and applications related to accounting, financial control, and auditing functions.

Principles and practices of planning, accounting, and fiscal control applicable to community college district financial operations.

Federal, state, and district regulations, policies, and procedures applicable to area of assignment.

Ability to:

Plan, organize, and coordinate assigned district financial functions.

Provide information and assistance to district staff regarding practices and procedures of assigned area.

Perform complex technical accounting duties related to area of assignment.

On a continuous basis, know and understand operations. Intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.

On a continuous basis, sit at desk for long periods of time. Intermittently, twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Maintain detailed and accurate records.

Compile and reconcile numerical and financial data.

Develop and implement various data collection, reporting, and filing systems.

Use sound judgment in recognizing scope of authority.

Operate and use modern office equipment including computers and applicable software.

Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Utilize appropriate safety procedures and practices for assigned duties.

Communicate effectively orally and in writing.

Relate effectively with people of varied academic, cultural and socio-economic backgrounds using tact, diplomacy and courtesy.

Establish and maintain effective, cooperative, and collaborative working relationships with others.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible financial or bookkeeping experience is desirable similar to Financial technician I with the West Valley-Mission Community College.

Education:

Equivalent to an associate's degree from an accredited college with major coursework in accounting, bookkeeping, or a related field.

Financial Technician III

In addition to the qualifications for the Financial Technician II:

Ability to:

Train and provide work direction to other staff as assigned.

Experience and Education

Any combination of experience and education that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience similar to Financial Technician II with the West Valley-Mission Community College District.

Education:

Equivalent to an associate's degree from an accredited college with major coursework in accounting, bookkeeping, or a related field.

EEO Category: Technical/Paraprofessional

Date Approved: August 14, 2024