

Financial Assistant
Advanced Administrative Support Staff (0328)
Career Development Plan
SOC Code: 433031

This Career Development Plan provides promotional opportunities to Financial Assistants who continually demonstrate meritorious performance. Progression within the plan signifies an increase in skills, competencies and contributions to the organization's goals and objectives. The increased contribution is above and beyond normal changes that are necessary to maintain satisfactory performance within an ever-changing business environment. While this plan offers promotional opportunities, it does not require career advancement. Neither does it preclude appropriate action for those who fail to meet a satisfactory standard of performance.

Position: Financial Assistant I

Duties:

- Performs a variety of entry level financial tasks including, but not limited to, data entry of financial data, reconciliation of cash drawers, completion of miscellaneous financial forms including deposit slips, etc.

Minimum Qualifications:

- High School / GED
- One year of related experience.

Preferred Qualifications:

- As determined by department.

Development Requirement to Financial Assistant II:

- Departmental need.
- Budgetary capability.
- Financial Assistant II minimum requirements.
- Successful completion of internal training program.
- Demonstrated knowledge of departmental procedures.
- Completion of the Ambassador Training Program.
- Completion of the HRStar program.
- "Merit" performance within current position as documented by performance evaluation.

Position: Financial Assistant II

Duties:

- Performs a variety of complex clerical and entry level accounting activities applying accepted procedures to the preparation and maintenance of accounting and other records, and preparing financial, statistical, and/or technical reports to ensure accurate accounting records.
- May supervise other staff or student employees.
- Maintains computer-based spreadsheets.
- Verifies and reconciles monthly accounts and/or prepares monthly statements or reports.
- Prepares accounting, personnel and payroll forms.

- Maintains and inputs time and attendance records.
- Reviews claim and vendor invoices for accuracy.
- Verifies, corrects and updates data entry items.
- Maintains inventory.
- Acts as backup to other financial and administrative support staff.

Minimum Qualifications:

- High School / GED
- Three years of related experience.

Preferred Qualifications:

- As determined by department.

Development Requirement to Sr. Financial Assistant:

- Departmental need.
- Budgetary capability.
- Sr. Financial Assistant minimum requirements.
- Successful completion of internal training program.
- Demonstrated proficiency of internal procedures and ability to handle complex tasks with minimal supervision.
- Completion of the Ambassador Training Program.
- Completion of the HRStar program.
- "Merit" performance within current position as documented by performance evaluation.

Position: Sr. Financial Assistant

Duties:

- Performs a variety of complex clerical and entry level accounting activities applying accepted procedures to the preparation and maintenance of accounting and other records, and preparing financial, statistical, and/or technical reports to ensure accurate accounting records.
- May prepare budgetary reports for review by senior staff
- Supervises data entry reconciliation and production of monthly financial reports.
- Reviews documents for accuracy and completeness in compliance with department, college/division, and University procedures.
- Documents, records expenditures and prepares summary reports.
- Maintains, reconciles and inputs data in HRS.
- Serves as front-line fiscal liaison.
- Assists in BDS process.

Minimum Qualifications:

- High School / GED.
- Five years related experience.

Preferred Qualifications:

- As determined by department

Developmental Increases:

- Proposed salary would be no less than the minimum hiring range of the proposed level of advancement

- Increases of 10% or greater would require an approved Compensation Adjustment Request Form

Incentive Plans:

- Additional opportunities not yet specified

Additional promotional opportunities involving pay increases would be in accordance with Pay Guidelines and require approval by the appropriate Vice President.

Oklahoma State University is a dynamic and ever-changing organization. Therefore, it is expected that any and all provisions of this plan may change. OSU reserves the right to modify, revoke, suspend, terminate or change any or all provisions of the plan, in whole or part, at any time, with or without notice. The language that appears in this document is not intended to create, nor is it to be construed to constitute, a contract between Oklahoma State University and any or all of its employees.

Reviewed by:

Jamie Payne – Chief HR Officer, OSU Human Resources

Approved by:

Gary Clark – Senior Vice President and General Counsel, Office of the President

Joe Weaver – Senior Vice President, Administration and Finance

Dr. Gary Sandefur – Provost and Senior Vice President

Mike Holder – Vice President Athletic Program/Director, Athletics

Addendum A

Hiring Ranges

Financial Assistant

Position	Min Hourly	Max Hourly	Min Annual	Max Annual
Fin Ast I	\$10.45	\$13.45	\$21,736	\$27,976
Fin Ast II	\$11.45	\$14.80	\$23,816	\$30,784
Sr Fin Ast	\$12.55	\$16.30	\$26,104	\$33,904

External Market Information:

ERI: Financial Transactions General Clerk (433031) @ 1 year experience (Stillwater Market Area)

- Median: \$11.95 hr. / \$2,071 mo. / \$24,856 yr.
- 10th Percentile: \$10.63 hr. / \$1,842 mo. / \$22,110 yr.
- 90th Percentile: \$13.86 hr. / \$2,402 mo. / \$28,828 yr.

Recommended hiring range for Financial Assistant I was established by setting a 25% range around the ERI: Financial Transactions General Clerk median @ 1 year of experience