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| <b>Benchmark Title</b>   | <b>Financial Processing Specialist 1</b>  |
| <b>Group</b>   | <b>[2] Administration – General</b>   |
| <b>Sub-Group</b>   | <b>(d) Finance</b>  |
| <b>BM Pay Grade &amp; Job Code</b>                                     | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 1) [Job Code 283601]</li> <li>. Supervision Level 2, 3, or 4 (Pay Grade 2) [Job Code 283602]</li> <li>. Supervision Level 5 (Pay Grade 3) [Job Code 283603]</li> </ul> <p>-----</p> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 1, 2, or 3 (Pay Grade 2) [Job Code 283602]</li> <li>. Second Language required, plus Supervision Level 4 or 5 (Pay Grade 3) [Job Code 283603]</li> </ul>   |
| <b>Scope &amp; Level Definition</b>                                    | Jobs at this level provide financial data entry and basic support to department and/or clients.   |
| <b>Sample Duties at this Level</b>                                     | <ul style="list-style-type: none"> <li>. Provides front counter support by performing duties such as responding to routine inquiries</li> <li>. Gathers and provides routine information, in person and by telephone</li> <li>. Files and distributes cheques</li> <li>. Handles receipt of routine cash and cheques, in person and/or by mail, completing receipts and making deposits</li> <li>. Performs data entry and limited verification, and runs queries and reports using the Financial Management System (FMS)</li> <li>. Performs filing functions, including creating new files, maintaining archived files, and filing financial and legal documents, such as financial statements, contracts, budget sheets, invoices, and correspondence</li> <li>. Opens, sorts, and distributes mail, arranges for couriers, and folds and seals items for mailout</li> <li>. Restocks forms and brochures</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b>                          | <ul style="list-style-type: none"> <li>. High school graduation, plus one year of related post-secondary education, plus one year of related experience</li> <li>OR</li> <li>. An equivalent combination of education and experience</li> </ul>   |
| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works under general supervision</li> <li>. Work is performed in accordance with established procedures and well-defined standard practices involving limited freedom to select which methods are applicable in any given situation</li> <li>. Job tasks are usually well defined through others requiring the use of established guidelines where there is little or no choice of action</li> <li>. Some planning may be required</li> <li>. Performs routine duties independently</li> </ul>  |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties are of a straightforward procedural nature</li> <li>. Assembles and maintains data and/or information and ensures its reliability and quality</li> <li>. Resolves routine problems and refers other problems to senior staff.</li> <li>. Some opportunity for improvement of work methods that are of a straightforward procedural nature</li> </ul>  |

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| <b>Benchmark Title</b>                       | <b>Financial Processing Specialist 1</b>   |
| <b>Group</b>                                 | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                             | <b>(d) Finance</b>   |
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| <b>Responsibility for the Work of Others</b> | <p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p> |
| <b>Interpersonal Skills</b>                  | <p>Basic interpersonal skills are required</p> <ul style="list-style-type: none"> <li>. Exchanges routine information</li> <li>. Responds to basic requests for information</li> <li>. Provides information that is easily accessible within the work area</li> </ul>  |
| <b>Working Conditions</b>                    | <ul style="list-style-type: none"> <li>. Job is performed in a standard office environment</li> <li>. Occasional exposure to minor disagreeable conditions, such as dealing with upset or difficult clients</li> <li>. Interruptions are an expected part of the work, and reprioritization and/or rescheduling of tasks is required for work completion</li> </ul>  |
| <b>Physical and Sensory Effort</b>           | <p>Minor fatigue results from:</p> <ul style="list-style-type: none"> <li>• Moderate periods of sitting and/or standing in one position, with limited opportunity to move or change position</li> <li>• Extra attentiveness required for performance of some detailed tasks requiring consistency and accuracy; the incumbent may change to alternative tasks requiring less sensory effort</li> </ul>   |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>   |
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| <b>Benchmark Title</b>   | <b>Financial Processing Specialist 2</b>   |
| <b>Group</b>   | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>   | <b>(d) Finance</b>   |
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| <b>BM Pay Grade &amp; Job Code</b>                                     | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 2) [Job Code 283701]</li> <li>. Supervision Level 3, 4, or 5 (Pay Grade 3) [Job Code 283702]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 1, 2, 3, or 4 (Pay Grade 3) [Job Code 283702]</li> <li>. Second Language required, plus Supervision Level 5 (Pay Grade 4) [Job Code 283703]</li> </ul>  |
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| <b>Scope &amp; Level Definition</b>                                    | Jobs at this level provide financial processing support of a routine nature to department and/or clients.  |
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| <b>Sample Duties at this Level</b>                                     | <ul style="list-style-type: none"> <li>. Performs processes related to wire transfers, returned cheques, donations, and petty cash by seeking and verifying information, preparing and posting journal vouchers, reconciling routine accounts, and maintaining records</li> <li>. Processes credit card transactions in the Financial Management System (FMS), sends clearing account details to departments, processes bank and credit card account transfers, enters bank adjustment items in FMS, and assists with credit card reconciliations</li> <li>. Prepares requisitions for processing by performing duties such as coding, ensuring adequate backup is present, and obtaining authorization.</li> <li>. Provides assistance for stop payments</li> <li>. Investigates and solves routine journal voucher and cash receipt anomalies</li> <li>. Codes requisitions, and assembles back up support for approval and data entry</li> <li>. Distributes invoices and statements</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b>                          | <ul style="list-style-type: none"> <li>. High school graduation, plus one year of related post-secondary education, plus two years of related experience</li> </ul> OR <ul style="list-style-type: none"> <li>. An equivalent combination of education and experience</li> </ul>   |
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| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works under general supervision</li> <li>. Work is performed in accordance with established procedures and well-defined standard practices involving limited freedom to select which methods are applicable in any given situation</li> <li>. Job tasks are usually well defined through others requiring the use of established guidelines where there is little or no choice of action</li> <li>. Some planning may be required</li> <li>. Performs routine duties independently</li> </ul>   |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties are of a straightforward procedural nature</li> <li>. Assembles and maintains data and/or information and ensures its reliability and quality</li> <li>. Resolves routine problems and refers other problems to senior staff</li> <li>. Some opportunity for improvement of work methods that are of a straightforward procedural nature</li> </ul>  |

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| <b>Benchmark Title</b>                       | <b>Financial Processing Specialist 2</b>   |
| <b>Group</b>                                 | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                             | <b>(d) Finance</b>   |
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| <b>Responsibility for the Work of Others</b> | <p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p> |
| <b>Interpersonal Skills</b>                  | <p>Moderate interpersonal skills are required</p> <ul style="list-style-type: none"> <li>. Verifies, explains, and/or exchanges detailed/specialized information</li> <li>. Selects information from more than one source</li> <li>. Responds to basic complaints</li> </ul>   |
| <b>Working Conditions</b>                    | <ul style="list-style-type: none"> <li>. Job is performed in a standard office environment</li> <li>. Occasional exposure to minor disagreeable conditions, such as dealing with upset or difficult clients</li> <li>. Interruptions are an expected part of the work, and reprioritization and/or rescheduling of tasks is required for work completion</li> </ul>  |
| <b>Physical and Sensory Effort</b>           | <p>Minor fatigue results from:</p> <ul style="list-style-type: none"> <li>• <input type="checkbox"/> Moderate periods of sitting and/or standing in one position, with limited opportunity to move or change position</li> <li>• Extra attentiveness required for performance of some detailed tasks requiring consistency and accuracy; the incumbent may change to alternative tasks requiring less sensory effort</li> </ul>  |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>   |
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| <b>Benchmark Title</b>                        | <b>Financial Processing Specialist 3</b>   |
| <b>Group</b>                                  | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                              | <b>(d) Finance</b>   |
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| <b>BM Pay Grade &amp; Job Code</b>            | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 4) [Job Code 283801]</li> <li>. Supervision Level 2, 3, or 4 (Pay Grade 5) [Job Code 283802]</li> <li>. Supervision Level 5 (Pay Grade 6) [Job Code 283803]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 1, 2, or 3 (Pay Grade 5) [Job Code 283802]</li> <li>. Second Language required, plus Supervision Level 4 or 5 (Pay Grade 6) [Job Code 283803]</li> </ul>   |
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| <b>Scope &amp; Level Definition</b>           | Jobs at this level provide financial processing support of a moderately complex nature to department and/or clients.   |
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| <b>Sample Duties at this Level</b>            | <ul style="list-style-type: none"> <li>. Performs processing and analysis related to benefits, accounts payable, and revenue accounting</li> <li>. Performs processing and analysis related to verifying and reconciling monthly ledgers, monitoring expenses, investigating and resolving irregularities, maintaining financial databases, processing requisitions and journal vouchers, and tracking invoice payments</li> <li>. Sets up project grants/accounts, prepares grant information, and maintains financial records of contracts and grants</li> <li>. Follows up and investigates issues such as chargebacks, and enters into the Financial Management System (FMS)</li> <li>. Assists with bank reconciliation</li> <li>. Enters invoices and requisitions into the Financial Management System (FMS), ensuring that transactions conform to University policies and procedures and departmental guidelines</li> <li>. Assesses the accuracy of relevant sales taxes on invoices, and self-assesses such taxes where necessary</li> <li>. Prepares standard financial reports to assist in developing and monitoring department budgets</li> <li>. Processes bank transactions, including entering data and following up with the bank and with University departments</li> <li>. Prepares and reviews requisition forms to ensure compliance with policies and adequacy of supporting material, correcting errors when appropriate, or returning to originator</li> <li>. Performs duties related to web-based finance forms, such as tracking transactions, preparing interface files for loading into FMS, and resolving production problems</li> <li>. Downloads banking-related data, enters into FMS, and forwards to departments</li> </ul> |
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| <b>Knowledge (Education &amp; Experience)</b> | <ul style="list-style-type: none"> <li>. High school graduation, plus one year of related post-secondary education, plus three years of relevant accounting experience</li> <li>OR</li> <li>. An equivalent combination of education and related experience</li> </ul>   |
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| <b>Judgement, Authority, Decision Making</b>  | <ul style="list-style-type: none"> <li>. Works independently under general supervision</li> <li>. Work is performed in accordance with established procedures and accepted practices involving freedom to select which methods are applicable in any given situation</li> <li>. Job tasks are generally standardized with ability to choose action within limits defined by standard/accepted data, information and procedures</li> <li>. Organization of work to accomplish goals is expected</li> </ul>  |

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| <b>Benchmark Title</b>   | <b>Financial Processing Specialist 3</b>   |
| <b>Group</b>   | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>   | <b>(d) Finance</b>   |
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| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of a minor interpretive and/or technical and/or analytical nature</li> <li>. Compiles, manipulates, and performs calculations on data</li> <li>. Compiles, interprets, and evaluates information to occasionally resolve moderately complex problems</li> <li>. Ideas developed result in minor changes to existing procedures, practices, standards, specifications, services, or projects</li> </ul>  |
| <b>Responsibility for the Work of Others</b>                           | <p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p> |
| <b>Interpersonal Skills</b>  | <p>Considerable interpersonal skills are required</p> <ul style="list-style-type: none"> <li>. Builds rapport and defuses tense situations with people who may be difficult or challenging</li> <li>. Actively listens, and probes for information to clarify requests</li> <li>. Uses tact and discretion when discussing problems and eliciting sensitive or confidential information</li> <li>. Provides interpretation of a routine to moderately complex nature</li> <li>. Makes informal demonstrations or presentations in areas of expertise</li> </ul>  |
| <b>Working Conditions</b>  | <ul style="list-style-type: none"> <li>. Job is performed in typical office setting</li> <li>. Work pressures, peak periods, multiple demands, deadlines or interruptions moderately impact task completion ability</li> </ul>   |
| <b>Physical and Sensory Effort</b>                                     | <p>Moderate fatigue results from:</p> <ul style="list-style-type: none"> <li>• Extended periods of sitting and/or standing in one position, with limited opportunity to move or change position</li> <li>• The requirement for extra attentiveness for performance of many detailed tasks requiring consistency and accuracy; the incumbent may change tasks, but most tasks have similar sensory demands</li> </ul>   |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>   |
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| <b>Benchmark Title</b>                        | <b>Financial Processing Specialist 4</b>   |
| <b>Group</b>                                  | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                              | <b>(d) Finance</b>   |
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| <b>BM Pay Grade &amp; Job Code</b>            | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 5) [Job Code 283901]</li> <li>. Supervision Level 4 or 5 (Pay Grade 6) [Job Code 283902]</li> </ul> <hr style="border-top: 1px dashed black;"/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 2, 3, 4, or 5 (Pay Grade 6) [Job Code 283902]</li> </ul>  |
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| <b>Scope &amp; Level Definition</b>           | Jobs at this level provide financial processing support of a complex nature to department and/or clients.  |
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| <b>Sample Duties at this Level</b>            | <ul style="list-style-type: none"> <li>. Prepares budgets, maintains ledgers, and prepares and processes account payables</li> <li>. Maintains the University's accounts receivable ledger</li> <li>. Monitors and reconciles complex accounts, and handles complex queries</li> <li>. Checks and corrects errors in ledgers of project grants (PGs) that require invoices</li> <li>. Reconciles vendor account statements</li> <li>. Prepares and inputs journal vouchers and vendor adjustments</li> <li>. Monitors collection of funds for contract and grant accounts for sponsored research and specific purpose funds</li> <li>. Initiates collection of outstanding accounts receivable, and follows up to resolve problem accounts</li> <li>. Prepares and/or reviews PO invoices to ensure compliance with contract terms and adequacy of supporting material, and works with Supply Management to resolve discrepancies</li> <li>. Coordinates and provides training and support, and participates in the finance certification internal audits of department managers, administrators, and researchers</li> <li>. Prepares invoices for sponsoring agencies or employees in accordance with terms and conditions of the agency, University policies and procedures, and union agreements</li> <li>. Interprets and resolves ambiguities in contract terms related to invoicing</li> <li>. Initiates and follows up on collection of funds, monitors deposits, and inactivates project grants (PGs)</li> <li>. Ensures correct allocation of funds to PGs</li> <li>. Assists with the accounts receivable function, and maintains related databases</li> <li>. Extracts data and prepares financial and statistical data and materials for reports</li> <li>. Provides training to faculty and staff on finance-related policies and procedures</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b> | <ul style="list-style-type: none"> <li>. High school graduation, plus two-year post-secondary diploma in accounting, plus three years of relevant accounting experience</li> </ul> OR <ul style="list-style-type: none"> <li>. An equivalent combination of education and related experience</li> </ul>  |
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| <b>Judgement, Authority, Decision Making</b>  | <ul style="list-style-type: none"> <li>. Works independently under general supervision</li> <li>. Work is performed in accordance with established procedures and accepted practices involving freedom to select which methods are applicable in any given situation</li> <li>. Job tasks are generally standardized with ability to choose action within limits defined by standard/accepted data, information and procedures</li> <li>. Organization of work to accomplish goals is expected</li> </ul>  |



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| <b>Benchmark Title</b>   | <b>Financial Processing Specialist 4</b>   |
| <b>Group</b>   | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>   | <b>(d) Finance</b>   |
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| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of a minor interpretive and/or technical and/or analytical nature</li> <li>. Compiles, manipulates, and performs calculations on data</li> <li>. Compiles, interprets, and evaluates information to occasionally resolve moderately complex problems</li> <li>. Ideas developed result in minor changes to existing procedures, practices, standards, specifications, services, or projects</li> </ul>  |
| <b>Responsibility for the Work of Others</b>                           | <p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p> |
| <b>Interpersonal Skills</b>  | <p>Considerable interpersonal skills are required</p> <ul style="list-style-type: none"> <li>. Builds rapport and defuses tense situations with people who may be difficult or challenging</li> <li>. Actively listens, and probes for information to clarify requests</li> <li>. Uses tact and discretion when discussing problems and eliciting sensitive or confidential information</li> <li>. Provides interpretation of a routine to moderately complex nature</li> <li>. Makes informal demonstrations or presentations in areas of expertise</li> </ul>  |
| <b>Working Conditions</b>  | <ul style="list-style-type: none"> <li>. Job is performed in typical office setting</li> <li>. Work pressures, peak periods, multiple demands, deadlines or interruptions moderately impact task completion ability</li> </ul>   |
| <b>Physical and Sensory Effort</b>                                     | <p>Moderate fatigue results from:</p> <ul style="list-style-type: none"> <li>• Extended periods of sitting and/or standing in one position, with limited opportunity to move or change position</li> <li>• The requirement for extra attentiveness for performance of many detailed tasks requiring consistency and accuracy; the incumbent may change tasks, but most tasks have similar sensory demands</li> </ul>   |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>   |
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| <b>Benchmark Title</b>                        | <b>Financial Processing Specialist 5</b>   |
| <b>Group</b>                                  | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                              | <b>(d) Finance</b>   |
| <b>BM Pay Grade &amp; Job Code</b>            | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 6) [Job Code 284001]</li> <li>. Supervision Level 2, 3, 4, or 5 (Pay Grade 7) [Job Code 284002]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 1, 2, or 3 (Pay Grade 7) [Job Code 284002]</li> <li>. Second Language required, plus Supervision Level 4 or 5 (Pay Grade 8) [Job Code 284003]</li> </ul>   |
| <b>Scope &amp; Level Definition</b>           | <p>Jobs at this level oversee the operations of a small- to mid-sized and/or moderately complex finance-related function, by performing duties such as coordinating work processes, establishing work schedules and priorities, and resolving complex issues.</p> <p>AND/OR</p> <p>Jobs at this level provide financial processing support of an advanced and complex nature to department clients.</p>  |
| <b>Sample Duties at this Level</b>            | <ul style="list-style-type: none"> <li>. Monitors, reconciles, and investigates errors and exceptions in large, complex accounts, such as payroll, tuition revenue, relevant sales taxes, and credit cards</li> <li>. Assists with University year-end financial statement preparation by performing duties such as year-end accruals</li> <li>. Prepares complex calculations, such as monthly sales tax filings, hotel/motel tax filings, and non-resident withholding tax and related tax filings</li> <li>. Assigns and modifies chartfields in the Financial Management System (FMS)</li> <li>. Handles appointments and other payroll-related documents for faculty, staff, and student employees, ensuring all factual data is correct and conforms to internal regulations, such as collective agreements, as well as external legislation (e.g., CCRA, HRDC, WCB, LRB and Ministry of Health)</li> <li>. Coordinates and provides training and support for faculty and staff on finance-related policies and procedures</li> <li>. Oversees operations of a small- to mid-sized, moderately complex specialty area, such as the Tuition Payment Office and Smart Forms</li> <li>. Monitors, reconciles, and investigates errors and exceptions related to large, complex accounts, such as prepaids, bank, cheque, and Pcard</li> <li>. Reviews requests for payments to non-residents for services rendered, calculates and withholds non-resident tax, prepares non-resident tax filings, and produces required forms and information for the Canada Revenue Agency</li> <li>. Tracks actual results against established budgets, reconciles transactions, and follows up on variances</li> <li>. Reviews and prepares remittances, such as sales taxes and HRT, to the Ministry of Finance</li> <li>. Ensures transfer of funds for the benefit component of salary to the central University project grant (PG)</li> <li>. Reviews the work of others, checking accuracy and compliance with policies and procedures</li> <li>. Makes recommendations and participates on committees to improve efficiency and effectiveness of processes</li> <li>. Manages transactions with banks, including foreign cheques, returned cancelled bank drafts for refund, and pre-authorized automatic debits</li> <li>. Prepares complex reports and statistics</li> <li>. Has signing authority on some accounts</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b> | <ul style="list-style-type: none"> <li>. High school graduation, plus Certificate in Accounting or Payroll CPA Level 1, plus four years of related experience</li> <li>OR</li> <li>. An equivalent combination of education and related experience</li> </ul>  |

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| <b>Benchmark Title</b>   | <b>Financial Processing Specialist 5</b>  |
| <b>Group</b>   | <b>[2] Administration – General</b>   |
| <b>Sub-Group</b>   | <b>(d) Finance</b>  |
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| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works independently under general supervision</li> <li>. Work is performed in accordance with established procedures and accepted practices involving freedom to select which methods are applicable in any given situation</li> <li>. Job tasks are generally standardized with ability to choose action within limits defined by standard/accepted data, information and procedures</li> <li>. Organization of work to accomplish goals is expected</li> </ul>   |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of an intermediate technical and/or analytical nature</li> <li>. Uses initiative, interpretation, and/or ingenuity to identify potential or actual problems, investigate causes, and resolve problems</li> <li>. Frequently resolves moderately complex problems, and occasionally resolves complex problems, in specialized areas, including for other staff</li> <li>. Ideas developed result in moderate changes to existing procedures, practices, standards, specifications, services, or projects</li> </ul>   |
| <b>Responsibility for the Work of Others</b>                           | <p>Levels of Supervision:</p> <ul style="list-style-type: none"> <li>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</li> <li>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</li> <li>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</li> <li>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</li> <li>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</li> </ul> |
| <b>Interpersonal Skills</b>  | <p>A high level of interpersonal skill is required</p> <ul style="list-style-type: none"> <li>. Provides assistance and emotional support to individuals who are under stress or in crisis, showing empathy and sensitivity</li> <li>. Actively listens, and probes for information to clarify complex requests</li> <li>. Provides interpretation of a complex nature</li> <li>. Makes informal demonstrations or presentations in areas of expertise</li> <li>. Provides training and/or instruction of a routine nature in areas of expertise</li> </ul>   |
| <b>Working Conditions</b>  | <ul style="list-style-type: none"> <li>. Job is performed in typical office setting</li> <li>. Work pressures, peak periods, multiple demands, deadlines or interruptions moderately impact task completion ability</li> </ul>  |
| <b>Physical and Sensory Effort</b>                                     | <ul style="list-style-type: none"> <li>. Significant fatigue results from the requirement for extra attentiveness for performance of most tasks, which are complex and/or lengthy, and/or for which maintenance of accuracy is critical and challenging</li> <li>. The incumbent often does not have the freedom to change tasks because one or more task must be completed within a critical time frame, and/or because the incumbent alone must complete key parts of processes</li> </ul>  |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>  |
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| <b>Benchmark Title</b>                        | <b>Senior Financial Specialist 1a</b>   |
| <b>Group</b>                                  | <b>[2] Administration – General</b>   |
| <b>Sub-Group</b>                              | <b>(d) Finance</b>  |
|   |   |
| <b>BM Pay Grade &amp; Job Code</b>            | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 8) [Job Code 284101]</li> <li>. Supervision Level 5 (Pay Grade 9) [Job Code 284102]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 3, 4, or 5 (Pay Grade 9) [Job Code 284102]</li> </ul>   |
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| <b>Scope &amp; Level Definition</b>           | <p>Jobs at this level oversee the operations of a large-sized and/or complex finance-related function, by performing duties such as coordinating work processes, establishing work schedules and priorities, and resolving complex issues.</p> <p>AND/OR</p> <p>Jobs at this level are "senior specialists", performing complex, specialized financial processes in one or more finance-related area, performing more complex analyses, investigations, and problem resolutions than "processing specialists". Acts as a resource for resolution of issues that are not resolved by "processing specialists".</p> <p>AND/OR</p> <p>Administers contract and grant accounts for complex sponsored research and specific purpose funds, requiring the exercise of judgment and knowledge of University, granting agency, and accounting policies and procedures.</p>  |
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| <b>Sample Duties at this Level</b>            | <ul style="list-style-type: none"> <li>. Oversees the operation of a large and/or complex specialty area, such as requisition processing, by coordinating work processes, establishing work schedules and priorities, and resolving complex issues</li> <li>. Provides authoritative financial advice to faculty members, department administrators, and department heads regarding research PGs</li> <li>. Acts as a resource to processing specialists for resolution of complex issues</li> <li>. Ensures that goods and services contracted for by the University are recorded and paid in a timely and accurate manner</li> <li>. Manages the financial relationship of project grants (PGs) with external agencies, vendors, and campus departments</li> <li>. Prepares financial reports on the use of contract and grant funds</li> <li>. Responds to non-routine queries from granting agencies, departments, and external auditors</li> <li>. Reviews and corrects complex transactions, and reconciles accounts</li> <li>. Investigates discrepancies in complex accounts, requiring extensive analysis and knowledge of the Financial Management System (FMS)</li> <li>. Interprets contracts and University policies, guidelines, procedures, and regulations, and ensures transactions and reporting are in compliance</li> <li>. Ensures accurate and timely processing of payments, including Q-requisitions, travel requisitions, honorariums, and purchase order invoices</li> <li>. Coordinates and provides training and support for faculty and staff on finance-related policies and procedures</li> <li>. Assists with preparation of University year-end audit schedules</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b> | <ul style="list-style-type: none"> <li>. High school graduation, plus Diploma in Accounting or Payroll CPA Level 2, plus four years of related experience</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>. An equivalent combination of education and related experience</li> </ul>  |
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| <b>Benchmark Title</b>   | <b>Senior Financial Specialist 1a</b>   |
| <b>Group</b>   | <b>[2] Administration – General</b>   |
| <b>Sub-Group</b>   | <b>(d) Finance</b>  |
|  |   |
| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works independently under minimal supervision</li> <li>. Work is performed in accordance with broadly established procedures and practices requiring initiative to plan and complete recurring assignments independently, and judgement to determine which of many methods are applicable in any given situation</li> <li>. There are a variety of job tasks requiring ongoing prioritization</li> <li>. Responsibilities and work situations are broader in scope, with limited opportunity for standardized solutions</li> </ul>   |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of an intermediate technical and/or analytical nature</li> <li>. Uses initiative, interpretation, and/or ingenuity to identify potential or actual problems, investigate causes, and resolve problems</li> <li>. Frequently resolves moderately complex problems, and occasionally resolves complex problems, in specialized areas, including for other staff</li> <li>. Ideas developed result in moderate changes to existing procedures, practices, standards, specifications, services, or projects</li> </ul>   |
| <b>Responsibility for the Work of Others</b>                           | <p>Levels of Supervision:</p> <ul style="list-style-type: none"> <li>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</li> <li>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</li> <li>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</li> <li>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</li> <li>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</li> </ul> |
| <b>Interpersonal Skills</b>  | <p>A high level of interpersonal skill is required</p> <ul style="list-style-type: none"> <li>. Provides assistance and emotional support to individuals who are under stress or in crisis, showing empathy and sensitivity</li> <li>. Actively listens, and probes for information to clarify complex requests</li> <li>. Provides interpretation of a complex nature</li> <li>. Makes informal demonstrations or presentations in areas of expertise</li> <li>. Provides training and/or instruction of a routine nature in areas of expertise</li> </ul>   |
| <b>Working Conditions</b>  | <ul style="list-style-type: none"> <li>. Work pressures, peak periods, multiple demands, deadlines or interruptions severely impact task completion ability</li> </ul>  |
| <b>Physical and Sensory Effort</b>                                     | <ul style="list-style-type: none"> <li>. Significant fatigue results from the requirement for extra attentiveness for performance of most tasks, which are complex and/or lengthy, and/or for which maintenance of accuracy is critical and challenging</li> <li>. The incumbent often does not have the freedom to change tasks because one or more task must be completed within a critical time frame, and/or because the incumbent alone must complete key parts of processes</li> </ul>  |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>  |
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| <b>Benchmark Title</b>                        | <b>Senior Financial Specialist 1b</b>  |
| <b>Group</b>                                  | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                              | <b>(d) Finance</b>   |
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| <b>BM Pay Grade &amp; Job Code</b>            | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 8) [Job Code 284201]</li> <li>. Supervision Level 5 (Pay Grade 9) [Job Code 284202]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 3, 4, or 5 (Pay Grade 9) [Job Code 284202]</li> </ul>  |
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| <b>Scope &amp; Level Definition</b>           | Jobs at this level oversee the operations of a large-sized and/or complex finance-related function, by performing duties such as coordinating work processes, establishing work schedules and priorities, and resolving complex issues.  |
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| <b>Sample Duties at this Level</b>            | <ul style="list-style-type: none"> <li>. Oversees operations of a large-sized and/or complex specialty area</li> <li>. Reconciles large and complex accounts such as credit card accounts</li> <li>. Coordinates work processes, establishes work schedules and priorities, and resolves complex problems</li> <li>. Conducts investigations into discrepancies in accounts, requiring detailed analysis and knowledge of the Financial Management System (FMS)</li> <li>. Oversees the financial function for a department or operation by performing duties such as assisting with the preparation of budgets, financial statements and reports, resolving unusual transactions and erroneous charges</li> <li>. Assists in the development and maintenance of a multi-faceted financial system to track and report revenue-generating events</li> <li>. Prepares event settlements and revenue and expense reports, ensuring all contractual obligations and other special arrangements are reflected in the settlements and reports</li> <li>. Oversees department payroll for casual/hourly and regular staff, including completing timesheets and appointment forms, tracking vacation and sick banks, and ensuring resolution of problems</li> <li>. Administers department project grants (PGs), including contract and grant accounts for sponsored research and specific purpose funds, by reviewing transactions for accuracy and compliance with rules, and monitoring the balance available for spending</li> <li>. Oversees the processing of financial requisitions and purchase requisitions, and payment of invoices and expenses</li> <li>. Ensures control of cash floats and sales deposits by following established procedures</li> <li>. Oversees accounts with vendors, including ordering approved goods, processing invoices, reviewing vendor statements, and establishing new accounts</li> <li>. Assists in the development and review of departmental financial procedures and systems, and provides training to staff</li> <li>. Ensures financial transactions, procedures, and record keeping meet audit standards, including ensuring adequate support for transactions and appropriate record retention</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b> | <ul style="list-style-type: none"> <li>. High school graduation, plus Diploma in Accounting or Payroll CPA Level 2, plus four years of related experience</li> <li>OR</li> <li>. An equivalent combination of education and related experience</li> </ul>  |
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| <b>Benchmark Title</b>   | <b>Senior Financial Specialist 1b</b>   |
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| <b>Group</b>   | <b>[2] Administration – General</b>   |
| <b>Sub-Group</b>   | <b>(d) Finance</b>  |
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| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works independently under minimal supervision</li> <li>. Work is performed in accordance with broadly established procedures and practices requiring initiative to plan and complete recurring assignments independently, and judgement to determine which of many methods are applicable in any given situation</li> <li>. There are a variety of job tasks requiring ongoing prioritization</li> <li>. Responsibilities and work situations are broader in scope, with limited opportunity for standardized solutions</li> </ul>   |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of an intermediate technical and/or analytical nature</li> <li>. Uses initiative, interpretation, and/or ingenuity to identify potential or actual problems, investigate causes, and resolve problems</li> <li>. Frequently resolves moderately complex problems, and occasionally resolves complex problems, in specialized areas, including for other staff</li> <li>. Ideas developed result in moderate changes to existing procedures, practices, standards, specifications, services, or projects</li> </ul>   |
| <b>Responsibility for the Work of Others</b>                           | <p>Levels of Supervision:</p> <ul style="list-style-type: none"> <li>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</li> <li>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</li> <li>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</li> <li>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</li> <li>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</li> </ul> |
| <b>Interpersonal Skills</b>  | <p>A high level of interpersonal skill is required</p> <ul style="list-style-type: none"> <li>. Provides assistance and emotional support to individuals who are under stress or in crisis, showing empathy and sensitivity</li> <li>. Actively listens, and probes for information to clarify complex requests</li> <li>. Provides interpretation of a complex nature</li> <li>. Makes informal demonstrations or presentations in areas of expertise</li> <li>. Provides training and/or instruction of a routine nature in areas of expertise</li> </ul>   |
| <b>Working Conditions</b>  | <ul style="list-style-type: none"> <li>. Work pressures, peak periods, multiple demands, deadlines or interruptions severely impact task completion ability</li> </ul>  |
| <b>Physical and Sensory Effort</b>                                     | <ul style="list-style-type: none"> <li>. Significant fatigue results from the requirement for extra attentiveness for performance of most tasks, which are complex and/or lengthy, and/or for which maintenance of accuracy is critical and challenging</li> <li>. The incumbent often does not have the freedom to change tasks because one or more task must be completed within a critical time frame, and/or because the incumbent alone must complete key parts of processes</li> </ul>  |
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|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>  |
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| <b>Benchmark Title</b>   | <b>Senior Financial Specialist 2</b>   |
| <b>Group</b>   | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>   | <b>(d) Finance</b>   |
| <b>BM Pay Grade &amp; Job Code</b>                                     | <ul style="list-style-type: none"> <li>. Base Level (Pay Grade 9) [Job Code 284301]</li> <li>. Supervision Level 3, 4, or 5 (Pay Grade 10) [Job Code 284302]</li> </ul> <hr/> <ul style="list-style-type: none"> <li>. Second Language required, plus Supervision Level 2, 3, 4, or 5 (Pay Grade 10) [Job Code 284302]</li> </ul>  |
| <b>Scope &amp; Level Definition</b>                                    | <p>Jobs at this level administratively oversee sophisticated, specialized, and complex financial processes for a department.</p> <p>OR</p> <p>Jobs at this level oversee the operations of the most complex and advanced unit of central finance or faculties/departments.</p>   |
| <b>Sample Duties at this Level</b>                                     | <ul style="list-style-type: none"> <li>. Administers programs, such as the loans program, coordinating work processes, establishing work schedules and priorities, and resolving complex issues</li> <li>. Ensures team compliance to standards based on established policies and procedures by monitoring and evaluating the quality of service provided, identifying areas for improvement, following up, and coaching staff</li> <li>. Identifies, plans, and implements operational improvements, new services, and process improvements</li> <li>. Negotiates alternative repayment plans with borrowers and guarantors, and determines when to send to a collection agency and when to write off balances owing</li> <li>. Places financial holds on University records to prevent access to registration, graduation, and transcripts</li> <li>. Manages department accounts, with full signing authority</li> <li>. Performs a key role in the budgeting process, providing projections and following up on variances</li> <li>. Performs in-depth statistical analyses pertaining to accounts, and prepares annual reports</li> <li>. Oversees production and distribution of a high volume of T4A slips for students who receive financial awards</li> <li>. Ensures the accurate processing of payments, deposits, transfers, and research</li> <li>. Oversees ordering and maintenance of furniture and equipment, liaising with external vendors as required</li> <li>. Oversees and ensures accuracy of processes such as cheque distribution</li> </ul> |
| <b>Knowledge (Education &amp; Experience)</b>                          | <ul style="list-style-type: none"> <li>. High school graduation, plus enrolment in final year of undergraduate studies with a minor in accounting/finance, plus five years of related experience</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>. An equivalent combination of education and related experience</li> </ul>  |
| <b>Judgement, Authority, Decision Making</b>                           | <ul style="list-style-type: none"> <li>. Works independently under broad direction</li> <li>. Work is performed within authorized prescribed limits and/or an approved plan</li> <li>. Exercises independent judgement in selecting and interpreting information, and reconciling deviations from standard methods</li> <li>. Job tasks are governed generally by broad instructions, objectives, and policies, usually involving frequently changing conditions and priorities</li> <li>. Assigned tasks make it necessary to determine what data and quality of data are required to make reliable decisions</li> </ul>  |
| <b>Creativity, Problem Solving, Analytic and/or Technical Thinking</b> | <ul style="list-style-type: none"> <li>. Job duties cover work of an advanced technical and/or analytical nature</li> <li>. Frequently resolves complex problems in specialized areas, including for other staff</li> <li>. Uses initiative, interpretation, and/or ingenuity to develop, implement, and evaluate innovative procedures, practices, standards, specifications, services, or projects</li> </ul>  |



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| <b>Benchmark Title</b>                       | <b>Senior Financial Specialist 2</b>   |
| <b>Group</b>                                 | <b>[2] Administration – General</b>  |
| <b>Sub-Group</b>                             | <b>(d) Finance</b>   |
| <b>Responsibility for the Work of Others</b> | <p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p> |
| <b>Interpersonal Skills</b>                  | <p>Advanced interpersonal skills are required</p> <ul style="list-style-type: none"> <li>. Requires diplomatic persuasiveness, sensitivity, and the ability to motivate desired behaviour and secure cooperation and acceptance of decisions</li> <li>. Negotiates to gain best value, or to gain agreement in hostile, emotional, or controversial situations</li> <li>. Makes formal presentations, including facilitating workshops, in areas of expertise</li> <li>. Provides training and/or instruction of a complex nature in areas of expertise</li> </ul>   |
| <b>Working Conditions</b>                    | . Work pressures, peak periods, multiple demands, deadlines or interruptions severely impact task completion ability   |
| <b>Physical and Sensory Effort</b>           | <ul style="list-style-type: none"> <li>. Significant fatigue results from the requirement for extra attentiveness for performance of most tasks, which are complex and/or lengthy, and/or for which maintenance of accuracy is critical and challenging</li> <li>. The incumbent often does not have the freedom to change tasks because one or more task must be completed within a critical time frame, and/or because the incumbent alone must complete key parts of processes</li> </ul>   |
|  | <p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>   |