



## Job Family - Financial Management

Job architecture is a University initiative that creates transparency and understanding about how staff positions are organized by job family, career track, and job level. A job family is a broad grouping of job profiles that span across the University, and use the same skills and knowledge to deliver a specific expertise type. A career track is a group of related job profiles in the same job family that represent the same nature of work with varying levels of contributions. This table of contents organizes job profiles in the Financial Management job family by career track.

Career Track	Career Track Definition	Job Profile (with Link)
Accounting	Establishes and maintains accounting policies and controls, fiscal controls, preparing financial reports and safeguarding the University's assets. Maintains accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.	<a href="#">Accounting, Director</a> <a href="#">Accounting, Sr. Manager</a> <a href="#">Accounting, Manager</a> <a href="#">Accounting, Supervisor</a> <a href="#">Accounting, Sr. Specialist</a> <a href="#">Accounting, Specialist</a> <a href="#">Accounting, Sr. Analyst</a> <a href="#">Accounting, Analyst</a>
Accounts Receivable/ Payable	Prepares, records, verifies, analyzes, and reports accounts payable/receivable transactions. Pays vendor invoices and receives and posts customer payments on a timely basis. Maintains and reconciles accounts payable/receivable ledger accounts, financial statements and reports. Prepares analyses and reconciliations of bill runs to detect fraud. Ensures that transaction entry verification procedures are followed.	<a href="#">Accounts Receivable/Payable, Manager</a> <a href="#">Accounts Receivable/Payable, Supervisor</a> <a href="#">Accounts Receivable/Payable, Analyst</a> <a href="#">Accounts Receivable/Payable, Business Coordinator</a>
Budget	Compiles and reviews the budgets for the University, taking into consideration actual performance, previous expenditures, and estimated expenses and income. Creates financial models and maintains accurate records of spending and budgetary control measures.	<a href="#">Budget, Sr. Manager</a> <a href="#">Budget, Manager</a> <a href="#">Budget, Sr. Specialist</a> <a href="#">Budget, Specialist</a> <a href="#">Budget, Sr. Analyst</a> <a href="#">Budget, Analyst</a>
Bursar & Cashier	Directs and manages the cashing function of the University. Acts as the main custodian of institutional funds. Manages lockbox or wire transfer operations and deposit and disbursement accounts.	<a href="#">Bursar &amp; Cashier, Sr. Manager</a> <a href="#">Bursar &amp; Cashier, Manager</a> <a href="#">Bursar &amp; Cashier, Supervisor</a> <a href="#">Bursar &amp; Cashier, Specialist</a> <a href="#">Bursar &amp; Cashier, Sr. Analyst</a>



Career Track	Career Track Definition	Job Profile (with Link)
Clinical Revenue	Develops, enhances, and effectively oversees revenue cycle operations, including activities related to charging, billing, and collecting. Expands and coordinates the Clinically Integrated Network. Assists department managerial and executive staff in the management of successful billing and compliance activities.	<a href="#">Clinical Revenue, Sr. Director</a> <a href="#">Clinical Revenue, Director</a> <a href="#">Clinical Revenue, Sr. Manager</a> <a href="#">Clinical Revenue, Manager</a> <a href="#">Clinical Revenue, Supervisor</a> <a href="#">Clinical Revenue, Sr. Specialist</a> <a href="#">Clinical Revenue, Specialist</a> <a href="#">Clinical Revenue, Sr. Analyst</a> <a href="#">Clinical Revenue, Business Sr. Coordinator</a> <a href="#">Clinical Revenue, Business Coordinator</a>
Financial Administration	Oversees the financial management of operating and capital budgets for divisions and University-wide administrative units. Develops long and short term financial goals, business strategies/plans, and financial forecasts/models for all major service programs and initiatives. Coordinates quarterly and year-end reporting for the operating budget.	<a href="#">Financial Administration, Sr. Director</a> <a href="#">Financial Administration, Director</a> <a href="#">Financial Administration, Sr. Manager</a> <a href="#">Financial Administration, Manager</a> <a href="#">Financial Administration, Sr. Specialist</a> <a href="#">Financial Administration, Specialist</a> <a href="#">Financial Administration, Sr. Analyst</a> <a href="#">Financial Administration, Analyst</a>
Financial Strategy	Assists the President and various internal committees by designing, implementing, and evaluating the University's financial strategy. Communicates analytical results and strategic thinking with the Board of Trustees and other critical stakeholders.	<a href="#">Financial Strategy, Director</a> <a href="#">Financial Strategy, Sr. Manager</a> <a href="#">Financial Strategy, Sr. Specialist</a> <a href="#">Financial Strategy, Specialist</a> <a href="#">Financial Strategy, Sr. Analyst</a>

Career Track	Career Track Definition	Job Profile (with Link)
Grant & Contract Administration	Coordinates pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit. Pre-award activities may include researching funding opportunities, preparing applications, and editing administrative sections of proposals. Post-award activities include monthly expenditure review, payment processing, salary allocations, and providing account projections.	<a href="#">Grant &amp; Contract Administration, Director</a> <a href="#">Grant &amp; Contract Administration, Sr. Manager</a> <a href="#">Grant &amp; Contract Administration, Manager</a> <a href="#">Grant &amp; Contract Administration, Supervisor</a> <a href="#">Grant &amp; Contract Administration, Sr. Specialist</a> <a href="#">Grant &amp; Contract Administration, Specialist</a> <a href="#">Grant &amp; Contract Administration, Sr. Analyst</a> <a href="#">Grant &amp; Contract Administration, Analyst</a> <a href="#">Grant &amp; Contract Administration, Business Sr. Coordinator</a> <a href="#">Grant &amp; Contract Administration, Business Coordinator</a>
Investment	Oversees the operational requirements of the Investment Office (IO), operational requirements of investments and assists the COO as necessary. The operational requirements of the IO encompass facilities, human resources administration, budgeting/expenses, and service provider contract negotiation and management.	<a href="#">Investment, Director</a> <a href="#">Investment, Sr. Manager</a> <a href="#">Investment, Manager</a> <a href="#">Investment, Sr. Specialist</a> <a href="#">Investment, Specialist</a> <a href="#">Investment, Sr. Analyst</a> <a href="#">Investment, Analyst</a>
Payroll	Directs the overall payroll activities of the centralized University payroll function, which serves all regular and temporary faculty, staff, and students. Works with the payroll staff to develop effective payroll practices, including preparing reports, in compliance with University policies and local, state, and federal laws. Ensures timely distribution of employees' payroll checks and W-2 Forms.	<a href="#">Payroll, Sr. Director</a> <a href="#">Payroll, Sr. Manager</a> <a href="#">Payroll, Manager</a> <a href="#">Payroll, Supervisor</a> <a href="#">Payroll, Business Sr. Coordinator</a> <a href="#">Payroll, Business Coordinator</a>



Career Track	Career Track Definition	Job Profile (with Link)
Procurement	Negotiates favorable terms, volume discounts and long-term contracts with suppliers, and prepares and processes requisitions and purchase orders for the procurement of goods, services and supplies for customer-related business processes or for internal use.	<a href="#">Procurement, Director</a> <a href="#">Procurement, Sr. Manager</a> <a href="#">Procurement, Manager</a> <a href="#">Procurement, Supervisor</a> <a href="#">Procurement, Sr. Specialist</a> <a href="#">Procurement, Specialist</a> <a href="#">Procurement, Sr. Analyst</a> <a href="#">Procurement, Analyst</a>
Risk Management	Develops and implements risk management strategies and policies which identify, assess and mitigate the impact of risks originating from or impacting the University unit's portfolio of activities/interests. Manages the analysis and reporting of risk management strategies to ensure compliance with University objectives.	<a href="#">Risk Management, Sr. Director</a> <a href="#">Risk Management, Specialist</a> <a href="#">Risk Management, Sr. Analyst</a>
Sponsored Programs	Provides central pre-award and post-award coordination and oversight of all sponsored projects at the University of Chicago. Manages the review and endorsement of sponsored project proposals, negotiate and accept awards and issue subawards on behalf of the University. Provides guidance of various grants and contracts for the support of research, training, and other sponsored activities at the University. Assists in the development of research compliance education programs.	<a href="#">Sponsored Programs, Director</a> <a href="#">Sponsored Programs, Sr. Manager</a> <a href="#">Sponsored Programs, Manager</a> <a href="#">Sponsored Programs, Supervisor</a> <a href="#">Sponsored Programs, Specialist</a> <a href="#">Sponsored Programs, Sr. Analyst</a>
Treasury	Monitors and manages the University's treasury activities, including cash balances, credit balances, liquidity positions, and debt and capital management. Provides quarterly forecasting estimates and manages relationships with on-campus banking partners. Works with University leadership, long term financial planning working groups, and Board of Trustees committees.	<a href="#">Treasury, Director</a> <a href="#">Treasury, Sr. Manager</a>



### Job Profile: Accounting, Director

#### Job Summary

The job provides leadership and direction through managers responsible for establishing and maintaining accounting policies and controls, fiscal controls, preparing financial reports and safeguarding the assets. Develops strategy for accounting and financial records and reports.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIACCM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Manages employees through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
1. Provides leadership on accounting transactions, collecting and analyzing accounting data, analyzing business results, and/or developing management reports.
2. Oversees accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.
3. Oversees the development and implements accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets. Approves and implements procedures for improved operations.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Sr. Manager

#### Job Summary

The job manages multiple teams of managers and professional staff responsible for establishing and maintaining accounting policies and controls, fiscal controls, preparing financial reports and safeguarding the assets. Develops strategy for accounting and financial records and reports.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIACCM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Advises on accounting transactions, collecting and analyzing accounting data, analyzing business results, and/or developing management reports.
3. Reviews and approves accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.
4. Develops and implements accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets. Approves and implements procedures for improved operations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Manager

#### Job Summary

The job manages a team of professional staff responsible for establishing and maintaining accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets. Develops strategy for accounting and financial records and reports.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIACCM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Reviews accounting transactions, collecting and analyzing accounting data, analyzing business results, and/or developing management reports.
3. Manages accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.
4. Advises and monitors accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Supervisor

#### Job Summary

The job supervises and monitors a team of support staff responsible for establishing and maintaining accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIACCM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Supervises support staff, including selection, training, performance appraisal and work allocation.
2. Coordinates accounting transactions, collecting and analyzing accounting data, analyzing business results, and/or developing management reports.
3. Controls accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.
4. May recommend methods for improved operations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





### Job Profile: Accounting, Sr. Specialist

#### Job Summary

The job solves complex problems related to accounting policies and controls, creates financial reports, and safeguards assets. Works independently to manage the general ledger and create financial statements, regulatory reports, and management reports.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIACCP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Uses specialized knowledge and breadth of experience to perform a variety of complex operating or cost accounting activities, incorporating accounting theories and principles.
2. Leads the analysis of complex accounting records for the purpose of determining gains and losses, receipt and disbursements, and inventory.
3. Leads others and provides expertise on systems of recording costs or other financial and budgetary data.
4. Recommends methods for improved operations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Specialist

#### Job Summary

The job develops and maintains accounting policies and controls, creates financial reports, and safeguards assets. Works independently to manage the general ledger and create financial statements, regulatory reports, and management reports.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIACCP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Uses in-depth knowledge and experience to perform a variety of complex operating or cost accounting activities, incorporating accounting theories and principles.
2. Examines and analyzes complex accounting records for the purpose of determining gains and losses, receipt and disbursements, and inventory.
3. Develops income and balance sheet statements, consolidated statements, and various other specialized accounting statements and reports.
4. Guides others and acts as a resource on systems of recording costs or other financial and budgetary data.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Sr. Analyst

#### Job Summary

The job provides professional support and solves straightforward problems related to accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets. Maintains accounting and financial records, including general ledger, financial statements, regulatory and management reports at the instruction of others.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIACCP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Performs a variety of operating or cost accounting activities which require moderate knowledge of accounting theories and principles.
2. Interprets accounting records for the purpose of determining gains and losses, receipts and disbursements, and inventory.
3. Has a moderate/high level of authority in drafting income and balance sheet statements, consolidated statements, and various other accounting statements and reports.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounting, Analyst

#### Job Summary

The job performs routine activities to establish and maintain accounting policies and controls, fiscal controls, preparing financial reports and safeguarding assets. Maintains accounting and financial records, including general ledger, financial statements, regulatory and management reports at the instruction of others.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIACCP1

#### Job Level

P1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

#### Responsibilities

1. Performs a variety of routine operating or cost accounting activities which require basic knowledge of accounting theories and principles.
2. Examines accounting records for the purpose of determining gains and losses, receipts and disbursements, and inventory.
3. Drafts income and balance sheet statements, consolidated statements, and various other accounting statements and reports.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounts Receivable/Payable, Manager

#### Job Summary

The job manages a team of professional staff responsible for accounts payable/receivable transactions. Manages the staff who pay vendor invoices, receive and post customer payments on a timely basis, maintain and reconcile accounts payable/receivable ledger accounts, financial statements and reports. Ensures that transaction entry verification procedures are followed.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIARPM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages accounts payable processes and reviews work related to verifying invoices, computing discounts, coding expenses, preparing vouchers, and issuing checks for payment.
2. Monitors the day-to-day payments and receipts of bills, as well as the maintenance of accounts payable and receivable ledgers.
3. Advises the amount of working capital necessary to finance accounts payable and/or receivable operations.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Accounts Receivable/Payable, Supervisor

#### Job Summary

The job supervises a team of support staff responsible for accounts payable/receivable transactions. Supervises the staff who pay vendor invoices, receive and post customer payments on a timely basis, maintain and reconcile accounts payable/receivable ledger accounts, financial statements and reports. Ensures that transaction entry verification procedures are followed.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIARPM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Supervises accounts payable processes and reviews work related to verifying invoices, computing discounts, coding expenses, preparing vouchers, and issuing checks for payment.
2. Supervises the day-to-day payments and receipts of bills, as well as the maintenance of accounts payable and receivable ledgers.
3. Recommends the amount of working capital necessary to finance accounts payable and/or receivable operations.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



**Job Profile: Accounts Receivable/Payable, Analyst**

**Job Summary**

The job performs routine assignments related to accounts payable/receivable transactions. Assists in paying vendor invoices and receives and posts customer payments on a timely basis. Ensures that transaction verification procedures are followed with a limited degree of supervision.

**FLSA Status**

☐ Exempt ☒ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIARPP1

**Job Level**

P1

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

**Responsibilities**

1. Performs a variety of accounts receivable/payable related activities using existing procedures to solve routine or standard problems.
2. Responds to and researches accounts receivable/payable inquiries including payments to vendors and reimbursements to individuals with guidance and direction from others.
3. Collects, interprets, and performs routine analyses of payables data. Likely to act as an informal resource to associates with less experience.
4. Reviews invoice payment reports and conducts appropriate payables transactions to correct errors, with skills learned through considerable on-the-job experience.
5. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



**Job Profile: Accounts Receivable/Payable, Business Coordinator**

**Job Summary**

The job provides specialized business support for accounts payable/receivable transactions. Assists in paying vendor invoices and receives and posts customer payments on a timely basis. Ensures that transaction verification procedures are followed with a limited degree of supervision.

**FLSA Status**

☐ Exempt ☒ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIARPB3

**Job Level**

B3

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Has developed specialized skills or is multi-skilled developed through job-related training and considerable on-the-job experience. Completes work with a limited degree of supervision. Likely to act as an informal resource for colleagues with less experience.

**Responsibilities**

1. Performs a variety of accounts receivable/payable related activities which requires functional knowledge of invoice processing procedures.
2. Responds to and researches accounts receivable/payable inquiries including payments to vendors and reimbursements to individuals with a limited degree of supervision.
3. Collects, interprets, and performs some routine analyses of payables data. May act as an informal resource to associates with less experience.
4. Reviews invoice payment reports and creates appropriate payables transactions to correct errors, with skills learned through considerable on-the-job experience.
5. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

**Experience**

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

**Licenses and Certifications**

- None.





### Job Profile: Budget, Sr. Manager

#### Job Summary

The job manages multiple teams of managers and professional staff responsible for compiling and reviewing the budgets. Manages the development and administration of budgetary control and spending records.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIBUDM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages managers and the budget professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Develops a long-term financial plan integrated with the budget process. Develops strategies to proactively address issues or problems with financial results and insure balanced operations.
3. Ensures the development and administration of the annual budget and financial performance, from a systems as well as procedural/process standpoint.
4. Develops communications with internal offices and departments, external constituencies, and within the University.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



Job Profile: Budget, Manager	
<b>Job Summary</b>	
The job manages a team of professional staff responsible for compiling and reviewing the budgets. Manages the development and administration of budgetary control and spending records.	
<b>FLSA Status</b>	<b>Role Impact</b>
<input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	<input checked="" type="checkbox"/> People Manager <input type="checkbox"/> Individual Contributor
<b>Job Code</b>	<b>Job Level</b>
FIBUDM2	M2
<b>Job Family Description</b>	<b>Job Level Description</b>
Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.	Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.
<b>Responsibilities</b>	
<ol style="list-style-type: none"><li>1. Manages the budget professional staff. Develops performance goals, allocates resources and assesses policies for direct subordinates.</li><li>2. May develop or assist in the development of a long-term financial plan integrated with the budget process. Develops strategies to proactively address issues or problems with financial results and insure balanced operations.</li><li>3. Manages development and administration of the annual budget and financial performance, from a systems as well as procedural/process standpoint.</li><li>4. Manages communications with internal offices and departments, external constituencies, and within the University.</li><li>5. Performs other related work as needed.</li></ol>	
<b>Education, Experience and Certifications</b>	
<b>Education</b> <ul style="list-style-type: none"><li>• Minimum requirements include a college or university degree in related field.</li></ul>	
<b>Experience</b> <ul style="list-style-type: none"><li>• Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.</li></ul>	
<b>Licenses and Certifications</b> <ul style="list-style-type: none"><li>• None.</li></ul>	



### Job Profile: Budget, Sr. Specialist

#### Job Summary

The job leads and provides expertise to the development of budgets, taking into consideration actual performance, previous expenditures, and estimated expenses and income. Creates complex financial models and maintains accurate records of spending and budgetary control measures.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIBUDP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Provides high level specialized analysis and administration of the budget process. Reviews and partners with senior staff from all units to Ensure budget proposals are accurate, complete, and in compliance with established procedures, regulations, and organizational objectives.
2. Advises others on operational budgets. Reports on variances between the approved budget and actual performance and recommends revised procedures.
3. Provides analytical support for complex budget projects. Analyzes budget estimates and proposals for completeness; accuracy; and conformance with established procedures, regulations, and organizational objectives.
4. Identifies current and future resource planning and allocation issues and develops, leads, and supervises complex studies and analyses that will assist senior staff in reaching resource planning and allocation decisions,.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Budget, Specialist

#### Job Summary

The job uses best practices and knowledge to develop budgets, taking into consideration actual performance, previous expenditures, and estimated expenses and income. Creates financial models and maintains accurate records of spending and budgetary control measures.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIBUDP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Provides specialized analysis and administration of the budget.
2. Has a deep understanding of operational budgets for departments or other operational units.
3. Provides analytical support for moderately complex budget projects. Analyzes budget estimates and proposals for completeness; accuracy; and conformance with established procedures, regulations, and organizational objectives.
4. Reports on variances between the approved budget and actual performance and recommends revised procedures.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Budget, Sr. Analyst

### Job Summary

The job uses an understanding of key business drivers to accomplish work related to the creation and management of budgets. Compiles and reviews the budget, taking into consideration actual performance, previous expenditures, and estimated expenses and income. Drafts financial models and maintenance of accurate records of spending and budgetary control measures.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIBUDP2

### Job Level

P2

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

### Responsibilities

1. Supports the drafting of budgets, providing analytical support for routine budget projects and analyzing budget estimates and proposals. Ensures budget proposals are accurate, complete, and in compliance with established procedures, regulations, and organizational objectives.
2. Researches past budgets and economic and financial developments that affect spending, and prepares budget summaries for management.
3. Drafts analyses for proposed plans and devises possible alternatives if the projected results are unsatisfactory. Periodically monitors the budget by reviewing reports and accounting records to determine if allocated funds have been spent as specified.
4. Drafts variance summaries highlighting difference between the approved budget and actual performance, and make recommendations regarding excess and deficient funds. Informs managers and others within the organization of the status and availability of funds in different accounts.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



## Job Profile: Budget, Analyst

### Job Summary

The job performs a broad range of operational business activities to accomplish work related to the creation and management of budgets. Compiles and reviews the budgets, taking into consideration actual performance, previous expenditures, and estimated expenses and income. Drafts financial models and maintenance of accurate records of spending and budgetary control measures.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIBUDP1

### Job Level

P1

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

### Responsibilities

1. Supports the drafting of department budgets, providing analytical support for routine budget projects and analyzing budget estimates and proposals. Ensures budget proposals are accurate, complete, and in compliance with established procedures, regulations, and organizational objectives.
2. Researches past budgets and economic and financial developments that affect spending, and may prepares budget summaries for management.
3. Drafts analyses for proposed plans. Periodically monitors the budget by reviewing reports and accounting records to determine if allocated funds have been spent as specified.
4. Drafts variance summaries highlighting differences between the approved budget and actual performance, and make recommendations regarding excess and deficient funds. May inform managers and others within the organization of the status and availability of funds in different accounts.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Bursar & Cashier, Sr. Manager

#### Job Summary

The job manages multiple related teams of managers and professional staff responsible for the cashiering function of the University.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIBURM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Acts as the main custodian of institutional funds, managing a team of managers and professionals who manage the lockbox/wire transfer operations, and deposit and disbursement accounts.
2. Ensures that student accounts are up to date and distributes billing in a timely manner. Responsible for collections and credits for the student accounts, reconciliation of data in the system.
3. Guides the team as well as the academic units through the process of tuition and fee assessments and stipend processing.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Bursar & Cashier, Manager

#### Job Summary

The job manages a team of professional staff responsible for the cashiering function of the University.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIBURM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Acts as the main custodian of institutional funds, managing a team of professionals who manages the lockbox/wire transfer operations, and deposit and disbursement accounts.
2. Reviews student accounts to verify they are up to date and distributes billing in a timely manner. May be responsible for collections and credits for the student accounts, reconciliation of data in the system.
3. Advises the team as well as the academic units through the process of tuition and fee assessments and stipend processing.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





### Job Profile: Bursar & Cashier, Supervisor

#### Job Summary

The job supervises and monitors a team of support staff responsible for the cashiering function of the University.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIBURM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Acts a custodian of institutional funds, managing a team of support staff who manages the lockbox/wire transfer operations, and deposit and disbursement accounts.
2. Maintains student accounts and distributes billing in a timely manner. Prioritizes collections and credits for the student accounts and the reconciliation of data in the system.
3. Supervises the team as well as the academic units through the process of tuition and fee assessments and stipend processing.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Bursar & Cashier, Specialist

#### Job Summary

The job manages the cashiering function and institutional funds of the University. Works independently to maintain lockbox/wire transfer operations and deposit and disbursement accounts.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIBURP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Uses in-depth knowledge and experience to identify, monitor, and evaluate priorities; implement new processes; and develop and improve reporting capabilities within the student billing system.
2. Incorporate best-practices into the development and maintenance of the student billing system. Ensuring that operations accurately reflect the decisions of diverse and decentralized processes and are compliant with federal regulations.
3. Has full authority and collaborates with academic units to coordinate the process of tuition and fee assessments and stipend processing. Develops improvements to the processes as appropriate.
4. Manages several operating processes in the Bursar's Office including production and mailing of the Federal 198-T for the University.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Bursar & Cashier, Sr. Analyst

#### Job Summary

The job provides professional support and solves straightforward problems in the cashiering function and institutional funds of the University. Works independently to maintain lockbox/wire transfer operations and deposit and disbursement accounts.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIBURP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Uses moderate/solid understanding and experience to identify, monitor, and evaluate priorities; implement new processes; and develop and improve reporting capabilities within the student billing system.
2. Has a moderate/high level of authority in the development and maintenance of the student billing system. Ensures that operations accurately reflect the decisions of diverse and decentralized processes and are compliant with federal regulations.
3. Collaborates with academic units to coordinate the process of tuition and fee assessments and stipend processing. Investigates improvements to the processes as appropriate.
4. Participates in several operating processes in the Bursar's Office including production and mailing of the Federal 198-T for the University.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



**Job Profile: Clinical Revenue, Sr. Director**

**Job Summary**

The job provides leadership and direction through senior managers who are responsible for developing and overseeing revenue cycle operations, including activities related to charging, billing, and collecting. Ensures the expansion and coordination of the Clinically Integrated Network. Oversees the management of successful billing and compliance activities.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☒ People Manager ☐ Individual Contributor

**Job Code**

FIREVM5

**Job Level**

M5

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Provides divisional leadership and direction through senior managers. Is accountable for the performance and results of a unit. Gives input and executes sub-function strategy to achieve key University objectives that have campus-wide or institutional impact. Decisions are guided by functional strategy and objectives.

**Responsibilities**

1. Manages employees through senior managers. Oversees the development of performance goals, establishes the structure for allocating resources and assessing division or University policies.
2. Is accountable for the performance and results of multiple departments related to revenue cycle operations, including those involving charge capture, charge interfaces, billing and collections, credit balance management, denial management, provider plan enrollment, specified coding activities, and related technology platforms and tools.
3. Oversees and ensures successful expansion and coordination of the Clinically Integrated Network.
4. Represents leadership for the development and execution of strategies and processes to optimize the revenue cycle.
5. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



## Job Profile: Clinical Revenue, Director

### Job Summary

The job provides leadership and direction through managers who are responsible for developing and overseeing revenue cycle operations, including activities related to charging, billing, and collecting. Ensures the expansion and coordination of the Clinically Integrated Network. Oversees the management of successful billing and compliance activities.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIREVM4

### Job Level

M4

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

### Responsibilities

1. Manages employees through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for the related departments managed.
2. Is accountable for the performance and results of multiple departments related to revenue cycle operations, including those involving charge capture, charge interfaces, billing and collections, credit balance management, denial management, provider plan enrollment, specified coding activities, and related technology platforms and tools.
3. Ensure successful expansion and coordination of the Clinically Integrated Network.
4. Structures and executes strategies and processes to optimize the revenue cycle.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Sr. Manager

#### Job Summary

The job manages multiple related teams of managers and professional staff responsible for developing and overseeing revenue cycle operations, including activities related to charging, billing, and collecting. Ensures the expansion and coordination of the Clinically Integrated Network. Oversees the management of successful billing and compliance activities.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIREVM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Is accountable for the performance and results of multiple departments related to revenue cycle operations, including those involving charge capture, charge interfaces, billing and collections, credit balance management, denial management, provider plan enrollment, specified coding activities, and related technology platforms and tools.
3. Ensures successful expansion and coordination of the Clinically Integrated Network.
4. Develops and executes strategies and processes to optimize the revenue cycle.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Manager

#### Job Summary

The job manages a team of professional staff responsible for revenue cycle operations, including activities related to charging, billing, and collecting. Coordinates the management of successful billing and compliance activities with department managerial and executive staff.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIREVM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages the day-to-day activities of the Clinical Revenue support staff.
2. Prioritizes chart documentation and maintaining requirements within the department. Ensures all processes involved in accurately posting professional fees.
3. Reviews coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff. Informs department administrators, physicians, and Coder/Abstractors of regulatory changes.
4. Maintains departmental compliance efforts by participating in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Supervisor

#### Job Summary

The job supervises a team of support staff responsible for revenue cycle operations, including activities related to charging, billing, and collecting. Coordinates the management of successful billing and compliance activities with department managerial and executive staff.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIREVM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Supervises the day-to-day activities of the Clinical Revenue support staff.
2. Prioritizes chart documentation and maintaining requirements within the department. Coordinates all processes involved in accurately posting professional fees.
3. Maintains coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff. Informs department administrators, physicians, and Coder/Abstractors of regulatory changes.
4. Prepares departmental compliance efforts by participating in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





### Job Profile: Clinical Revenue, Sr. Specialist

#### Job Summary

The job solves complex problems related to revenue cycle operations, including activities related to charging, billing, and collecting. Coordinates the management of successful billing and compliance activities with department managerial and executive staff.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIREVP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Provides expertise in prioritizing chart documentation and maintaining requirements within the department. Ensures all processes involved in accurately posting professional fees.
2. Provides expertise to coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff. Informs department administrators, physicians, and Coder/Abstractors of regulatory changes.
3. Leads departmental compliance efforts by participating in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Specialist

#### Job Summary

The job uses best practices and knowledge related to revenue cycle operations, including activities related to charging, billing, and collecting. Coordinates the management of successful billing and compliance activities with department managerial and executive staff.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIREVP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Has a deep understanding in the areas of chart documentation and maintaining requirements within the department. Ensures all processes involved in accurately posting professional fees.
2. Has a deep understanding of coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff. Informs department administrators, physicians, and Coder/Abstractors of regulatory changes.
3. Guides departmental compliance efforts by participating in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Clinical Revenue, Sr. Analyst

### Job Summary

The job provides professional support and solves straightforward problems in projects related to revenue cycle operations, including activities related to charging, billing, and collecting. Coordinates the management of successful billing and compliance activities with department managerial and executive staff.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIREVP2

### Job Level

P2

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

### Responsibilities

1. Prioritizes chart documentation and maintaining requirements within the department. Ensures all processes involved in accurately posting professional fees.
2. Has a moderate/solid understanding of coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff. Informs department administrators, physicians, and Coder/Abstractors of regulatory changes.
3. Participates and may lead in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations in promotion of compliance efforts.
4. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Business Sr. Coordinator

#### Job Summary

The job provides various routine office and location support activities by acting as a lead and coordinating the work of others in projects related to revenue cycle operations, including activities related to charging, billing, and collecting.

#### FLSA Status

☐ Exempt ☒ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIREVB4

#### Job Level

B4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Has developed expertise in a variety of work processes or activities typically developed through a combination of job-related training and considerable on-the-job experience. Typically acts as a lead, coordinating the work of others - but not a supervisor. Works autonomously within established procedures and practices.

#### Responsibilities

1. Acts as a lead in the coordination of chart documentation and maintains requirements within the department. Ensures all processes involved in accurately posting professional fees.
2. Supports coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff.
3. Participates in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations in promotion of compliance efforts.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Clinical Revenue, Business Coordinator

#### Job Summary

The job provides specialized business support for projects related to revenue cycle operations, including activities related to charging, billing, and collecting.

#### FLSA Status

☐ Exempt ☒ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIREVB3

#### Job Level

B3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Has developed specialized skills or is multi-skilled developed through job-related training and considerable on-the-job experience. Completes work with a limited degree of supervision. Likely to act as an informal resource for colleagues with less experience.

#### Responsibilities

1. Coordinates chart documentation and maintains requirements within the department. Ensures all processes involved in accurately posting professional fees.
2. Processes coding procedures, workflow issues, billing infrastructure, and performance of Clinical Revenue staff.
3. May participate in training sessions, performing audits, and promoting an understanding of procedures, policies, and expectations in promotion of compliance efforts.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Financial Administration, Sr. Director

### Job Summary

The role provides leadership and direction through managers who are responsible for the financial management of operating and capital budgets for divisions and/or University-wide administrative units. This role may have global scope. The role's portfolio also includes two or more other operational areas of responsibility, such as facilities, IT, or a revenue generating area. Executes financial goals and business plans and contributes to the development of functional strategy. Directs financial forecasting and modeling for all major service programs and initiatives. Directs quarterly and year-end reporting for the operating budget. Manages senior directors who manage teams.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIFADM5

### Job Level

M5

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides divisional leadership and direction through senior managers. Is accountable for the performance and results of a unit. Gives input and executes sub-function strategy to achieve key University objectives that have campus-wide or institutional impact. Decisions are guided by functional strategy and objectives.

### Responsibilities

1. Manages employees through senior managers. Oversees the development of performance goals, establishes the structure for allocating resources and assessing division or University policies.
2. Crafts and executes functional business plans and contributes to the development of financial goals, strategies, plans, and policies for the unit.
3. Oversees the management of operating and capital budgets, information and accounting systems, revenue billing and collection, and the monitoring of expenditures on active accounts.
4. Establishes budgets for all areas within scope of responsibility. Directs quarterly and year-end reporting for the operating budget.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



## Job Profile: Financial Administration, Director

### Job Summary

The job provides leadership and direction through managers who are responsible for the financial management of operating and capital budgets for divisions and/or University-wide administrative units. Executes financial goals and business plans and contributes to the development of functional strategy. Directs financial forecasting and modeling for all major service programs and initiatives. Directs quarterly and year-end reporting for the operating budget.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIFADM4

### Job Level

M4

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

### Responsibilities

1. Manages financial staff through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for the related departments managed.
2. Oversees functional business plans and contributes to the development of financial goals, strategies, plans, and policies for the unit.
3. Ensures the management of operating and capital budgets, information and accounting systems, revenue billing and collection, and the monitoring of expenditures on active accounts.
4. Establishes budgets for all areas within scope of responsibility. May direct quarterly and year-end reporting for the operating budget.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



## Job Profile: Financial Administration, Sr. Manager

### Job Summary

The job manages multiple related teams of managers and professional staff responsible for the financial management of operating and capital budgets for divisions and/or University-wide administrative units. Executes financial goals and business plans and contributes to the development of functional strategy. Directs financial forecasting and modeling for all major service programs and initiatives. Directs quarterly and year-end reporting for the operating budget.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIFADM3

### Job Level

M3

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

### Responsibilities

1. Manages financial staff through subordinates, usually other managers and professional staff. Establishes performance goals, allocates resources and assesses policies for the related departments managed.
2. Executes functional business plans and contributes to the development of financial goals, strategies, plans, and policies for the unit.
3. Recommends the management of operating and capital budgets, information and accounting systems, revenue billing and collection, and the monitoring of expenditures on active accounts.
4. Advises budgets for all areas within scope of responsibility. Directs quarterly and year-end reporting for the operating budget.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.





### Job Profile: Financial Administration, Manager

#### Job Summary

The job manages a team of professional staff responsible for the financial management of operating and capital budgets for divisions and/or University-wide administrative units. Develops long and short term plans to achieve financial goals, business strategies/plans, and financial forecasts/models for all major service programs and initiatives. Manages quarterly and year-end reporting for the operating budget.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIFADM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages the development, monitoring, and evaluation of a consolidated annual and intermediate (typically three to five year) budget plan and budget process for a unit, as well as actual performance against budget.
2. Manages the preparation of financial statements, activity reports, financial position forecasts, and/or reports required by regulatory agencies.
3. Manages, negotiates, and resolves financial compliance issues with various governmental agencies.
4. Manages the preparation of audits and value-add financial analysis. Advises senior management on financial reporting requirements.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Financial Administration, Sr. Specialist

#### Job Summary

The job provides specialized financial knowledge and breadth of expertise to serve complex departmental or divisional units enabling leaders to meet organizational needs, align with goals and accomplish strategic targets. Develops, manages, or interprets reports and data to make recommendations for revenue, budget, or similar department or divisional financial strategies.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFADP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Serves as an experienced liaison interacting with financial administrators within operational units on financial, budget or accounting matters to prepare, advise and recommend.
2. Conducts quantitative and qualitative analyses to monitor and manage for expense optimization by identifying market drivers, enhance strategies, or improve revenue generation.
3. Provides financial input based on the development of data collection, metrics, reports and other analytical applications.
4. Analyze, organize and communicate business information to ensure deliverables are meeting or exceeding expectations.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Financial Administration, Specialist

#### Job Summary

The job manages operating and capital budgets for divisions and/or University-wide administrative units. Helps develop long and short term financial goals, business strategies/plans, and financial forecasts/models for major service programs and initiatives. Manages quarterly and year-end reporting for the operating budget.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFADP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Works independently to maintain and support the planning and execution of financial strategy.
2. Uses best practices and in-depth financial knowledge to assist in the preparation of annual budgets. Works with minimal guidance to provide analytical support for complex budget projects. Examines past budgets and researches economic and financial developments that affect spending.
3. Reviews estimated expenditures. Develops expenditure projections and periodic budget variance reports. Prepares forecasts as well as analyses.
4. Acts as a resource for team members, solves complex problems. Explains complex and sensitive information.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Financial Administration, Sr. Analyst

#### Job Summary

The job coordinates projects in monitoring the operating and capital budgets for divisions and/or University-wide administrative units. At the instruction of others, performs work that contributes to development of long and short term financial goals, business strategies/plans, and financial forecasts/models for major service programs and initiatives. Utilizes moderate knowledge of finance to help coordinate quarterly and year-end reporting for the operating budget.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFADP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Provides professional support as a primary account administrator for account owners in an intensive customer service environment.
2. Analyzes and prepares budgets, creates accounts, and works with the financial accounting system to allocate, authorize, monitor, and control expenses.
3. Prepares monthly reports, conducts and correct errors in accounts using existing procedures that are in place, and provides advice on the financial impact of human resources and academic affairs decisions.
4. May work with other administrators on the procurement process, allocates expenditures for authorization, and advises in communications regarding funding agencies, subcontractors, and others at the instruction and direction of others.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Financial Administration, Analyst

### Job Summary

The job provides professional support in monitoring the operating and capital budgets for divisions and/or University-wide administrative units. At the instruction of others, performs work that contributes to development of long and short term financial goals, business strategies/plans, and financial forecasts/models for major service programs and initiatives. Utilizes rudimentary knowledge of finance to help coordinate quarterly and year-end reporting for the operating budget.

### FLSA Status

☐ Exempt ☒ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIFADP1

### Job Level

P1

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

### Responsibilities

1. Acts as a primary account administrator for account owners in an intensive customer service environment.
2. Routinely prepares budgets, creates accounts, and works with the financial accounting system to allocate, authorize, monitor, and control expenses.
3. Helps to prepare monthly reports, conducts and correct errors in accounts using existing procedures that are in place, and provides advice on the financial impact of human resources and academic affairs decisions.
4. Works with other administrators on the procurement process, allocates expenditures for authorization, and advises in communications regarding funding agencies, subcontractors, and others at the instruction and direction of others.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Financial Strategy, Director

#### Job Summary

The job provides leadership and direction through managers who are responsible for designing, implementing, and evaluating financial strategy. Oversees the communication of analytical results and strategic thinking to critical stakeholders.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIFINM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Manages employees through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for the related departments managed.
2. Oversees the development of the unit's financial strategy. Develops approaches for improving strategic decision-making and financial, analytical, and reporting rigor.
3. Directs financial analyses, including forecasts, risk analysis, and evaluation of strategic options, and statistical reporting.
4. Provides leadership for critical stakeholders on financial and budgeting matters and strategic thinking.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Financial Strategy, Sr. Manager

### Job Summary

The job manages multiple related teams of managers and professional staff responsible for designing, implementing, and evaluating the financial strategy. Oversees the communication of analytical results and strategic thinking to critical stakeholders.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIFINM3

### Job Level

M3

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

### Responsibilities

1. Manages managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Executes and contributes to the development of the unit's financial strategy. Develops approaches for improving strategic decision-making and financial, analytical, and reporting rigor.
3. Plans financial analyses, including forecasts, risk analysis, and evaluation of strategic options, and statistical reporting.
4. Advises and informs critical stakeholders on financial and budgeting matters and strategic thinking.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Financial Strategy, Sr. Specialist

#### Job Summary

The job provides specialized knowledge and breadth of expertise to serve various internal committees by designing, implementing, and evaluating financial strategy. Interprets and communicates complex analytical results and strategic thinking with critical stakeholders.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFINP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Works independently and serves as the primary financial strategy and modeling owner. Acts as a trusted advisor and recommends improvements regarding financial strategy and situation.
2. Collaborates to create long-term financial model to reflect the strategic priorities. Provides expertise to help ensure the integrity of financial analysis and planning.
3. Conducts and leads financial research to advance decision-making and communication for critical stakeholders. Solves complex financial problems by designing and executing regular and ad hoc financial analysis, including forecasting, risk analysis, and evaluation of strategic options.
4. Proactively identifies critical areas for attention and analysis. Devises approaches for improving the general level of strategic and analytical thinking.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





### Job Profile: Financial Strategy, Specialist

#### Job Summary

The job uses best practices and knowledge to serve by designing, implementing, and evaluating financial strategy. Interprets and communicates complex analytical results and strategic thinking with critical stakeholders.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFINP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Works mostly independently and serves as a financial strategy and modeling contributor. Acts as a trusted advisor and recommends improvements on financial strategy and situation.
2. Collaborates to create the long-term financial model to reflect the strategic priorities. Guides budget administrators to help ensure the integrity of financial analysis and planning.
3. Conducts financial research to advance decision-making and communication for critical stakeholders. Solves financial problems by designing and executing regular and ad hoc financial analysis, including forecasting, risk analysis, and evaluation of strategic options.
4. Identifies critical areas for attention and analysis. Devises approaches for improving the general level of strategic and analytical thinking.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Financial Strategy, Sr. Analyst

#### Job Summary

The job performs a range of professional activities to assist in designing, implementing, and evaluating financial strategy. Uses knowledge of the University and or unit, processes, and customers to communicate analytical results.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIFINP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Performs professional duties to assist in the development of new financial plans and planning process integrated with budgeting.
2. Conducts financial research to advance decision-making. Designs and executes regular and ad hoc financial analysis, including forecasting, risk analysis, and evaluation of strategic options.
3. Works closely with budget administrators to help ensure the integrity of financial analysis and planning.
4. Prepares statistical reports, analysis, presentations, and financial studies related to the financial situation.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Grant & Contract Administration, Director

### Job Summary

The job provides leadership and direction through managers to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FIGCAM4

### Job Level

M4

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

### Responsibilities

1. Manages employees through subordinates, usually other managers. Provides specialized support for the research enterprise within a department or unit, including pre- and/ or post-award administration for all sponsored activity. Serves as liaison between PIs, University administrative offices, and external agencies.
2. Establishes performance goals, allocates resources and assesses policies for direct subordinates. Ensures service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Oversees industry trends and remains current with agency and regulatory changes. Monitors department/unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



**Job Profile: Grant & Contract Administration, Sr. Manager**

**Job Summary**

The job manages multiple related teams of managers and professional staff responsible to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☒ People Manager ☐ Individual Contributor

**Job Code**

FIGCAM3

**Job Level**

M3

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

**Responsibilities**

1. Manages managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Establishes performance goals, allocates resources and assesses policies for direct subordinates. Ensures service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Maintains knowledge of industry trends and remains current with agency and regulatory changes. Plans for department/ unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



### Job Profile: Grant & Contract Administration, Manager

#### Job Summary

The job manages a team of professional staff responsible to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIGCAM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages employees by establishing annual performance goals, allocating resources, assessing annual performance, and determining individual merit, incentive and/or promotional increases.
2. Develops performance goals, allocates resources and assesses policies for direct subordinates. Ensures service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Remains current with agency and regulatory changes. Plans for department/unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Grant & Contract Administration, Supervisor

#### Job Summary

The job supervises and monitors a team of support staff responsible to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIGCAM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Supervises employees that provides specialized support for the research enterprise within a department or unit, including pre- and/ or post-award administration for all sponsored activity. Serves as liaison between PIs, University administrative offices, and external agencies.
2. Supervises employees directly including selection, training, performance appraisal and work allocation. Ensures service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Monitors industry trends and remains current with agency and regulatory changes. Plans for department/ unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



**Job Profile: Grant & Contract Administration, Sr. Specialist**

**Job Summary**

The job uses specialized knowledge and breadth of expertise within the University leading to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIGCAP4

**Job Level**

P4

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

**Responsibilities**

1. Solves complex problems in support for the research enterprise within a department or unit, including pre- and/ or post-award administration for all sponsored activity. Serves as liaison between PIs, University administrative offices, and external agencies.
2. Recommends service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Monitors industry trends and remains current with agency and regulatory changes. Monitors department/ unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



**Job Profile: Grant & Contract Administration, Specialist**

**Job Summary**

The job works independently to administer pre-award and/or post-award activities relating to grant and contract proposals/funding within a department or unit.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIGCAP3

**Job Level**

P3

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

**Responsibilities**

1. Provides specialized support for the research enterprise within a department or unit, including pre- and/ or post-award administration for all sponsored activity. Serves as liaison between PIs, University administrative offices, and external agencies.
2. Ensures service and communication to PIs, standardized information, best practices development, and that all faculty and research staff are aware of any new grant policies and changes.
3. Analyzes industry trends and remains current with agency and regulatory changes. Monitors department/ unit compliance with University, Divisional and Department policies and procedures and implements corrective actions for issues identified.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

**Licenses and Certifications**

- None.





**Job Profile: Grant & Contract Administration, Sr. Analyst**

**Job Summary**

The job provides professional support for pre-award and/or post-award activities relating to grant and contract proposals and funding within a department or unit. Pre-award activities include research, preparing applications, and editing proposals. Post-award activities include compliance monitoring, payment processing, and salary allocations. Performs work with moderate guidance and utilizes knowledge of University and business drivers.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIGCAP2

**Job Level**

P2

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

**Responsibilities**

1. Seeks new avenues for funding and grant opportunities and ensures that notices of relevant opportunities are brought to faculty attention. Works with sponsors to draft proposal budgets in accordance with University needs, with a moderate level of guidance and direction.
2. Reviews all applications against University guidelines, in addition to drafting progress reports, non-competing applications, amendments, and budgeting. Responsible for all data entry and preparation of grant reports and trend analysis.
3. Handles straightforward post-award activities including account creations, regulatory and compliance monitoring, salary allocations, effort reporting, grant projections, cost allocations, cost center charges, equipment inventory, invoice preparation, grant closing process, and account closing.
4. Prepares summaries of grants and effort allocations for Principal Investigators, meets with them and responds to their questions. Coordinates with other departments/units/divisions regarding multi investigator grants. Serves as department contact for annual audits and agency site visits.
5. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



## Job Profile: Grant & Contract Administration, Analyst

### Job Summary

The job performs routine pre-award and/or post-award activities relating to grant and contract proposals and funding within a department or unit. Pre-award activities include research, preparing applications, and editing proposals. Post-award activities include compliance monitoring, payment processing, and salary allocations. Performs work with guidance from others.

### FLSA Status

☐ Exempt ☒ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIGCAP1

### Job Level

P1

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

### Responsibilities

1. Researches new avenues for funding, research and grant opportunities. Ensures that notices of relevant opportunities are brought to faculty attention. With guidance and direction from others, works with sponsors to draft proposal budgets in accordance with unit or University needs.
2. Assists in the review of all applications against University guidelines, in addition to drafting progress reports, non-competing applications, amendments, and budgeting. Responsible for all data entry and preparation of grant reports and trend analysis.
3. Assists with straightforward post-award activities including account creations, regulatory and compliance monitoring, salary allocations, effort reporting, grant projections, cost allocations, cost center charges, equipment inventory, invoice preparation, grant closing process, and account closing.
4. Prepares summaries of grants and effort allocations for Principal Investigators, meets with them and responds to their questions. Coordinates with other departments/units/divisions regarding multi investigator grants. Serves as department contact for annual audits and agency site visits.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



**Job Profile: Grant & Contract Administration, Business Sr. Coordinator**

**Job Summary**

The job provides various routine office and location support activities by acting as a lead and coordinating the work of others for grant and contract proposals/funding within a department or unit. Pre-award activities include research, preparing applications, and reviewing proposals. Post-award activities include compliance monitoring, payment processing, and salary allocations.

**FLSA Status**

☐ Exempt ☒ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIGCAB4

**Job Level**

B4

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Has developed expertise in a variety of work processes or activities typically developed through a combination of job-related training and considerable on-the-job experience. Typically acts as a lead, coordinating the work of others - but not a supervisor. Works autonomously within established procedures and practices.

**Responsibilities**

1. Leads in pre-award activities including reading proposal guidelines; collecting, composing, and/or preparing administrative components of proposal submissions; preparing applications, performing funding searches, developing and preparing budgets, and monitoring regulatory compliance requirements.
2. Ensures timely and accurate submission of competitive and non-competitive proposals and renewals to University Research Administration. Ensures that all applications meet agency and University guidelines, published time tables, and deadlines.
3. Assists in post-award activities including account creation, regulatory compliance monitoring, salary allocations and effort reporting, lab order processing, invoice preparation, payment processing, cost center charges, cost transfers, summer salary processing, grant projections, grant closing processes and account closing.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

**Experience**

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



**Job Profile: Grant & Contract Administration, Business Coordinator**

**Job Summary**

The job provides specialized business support for grant and contract proposals/funding within a department or unit. Pre-award activities include research, preparing applications, and reviewing proposals. Post-award activities include compliance monitoring, payment processing, and salary allocations.

**FLSA Status**

☐ Exempt ☒ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIGCAB3

**Job Level**

B3

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Has developed specialized skills or is multi-skilled developed through job-related training and considerable on-the-job experience. Completes work with a limited degree of supervision. Likely to act as an informal resource for colleagues with less experience.

**Responsibilities**

1. Assists in pre-award activities including reading proposal guidelines; collecting, composing, and/or preparing administrative components of proposal submissions; preparing applications, performing funding searches, developing and preparing budgets, and monitoring regulatory compliance requirements.
2. Supports the timely and accurate submission of competitive and non-competitive proposals and renewals to University Research Administration. Checks that all applications meet agency and University guidelines, published time tables, and deadlines.
3. Assists in post-award activities including account creation, regulatory compliance monitoring, salary allocations and effort reporting, lab order processing, invoice preparation, payment processing, cost center charges, cost transfers, summer salary processing, grant projections, grant closing processes and account closing.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

**Experience**

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



### Job Profile: Investment, Director

#### Job Summary

The job provides leadership and direction through managers and directs the operational requirements of the Investment Office (IO), operational requirements of investments and assists the COO as necessary.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIINVM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Manages employees through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Directs the planning, analysis and implementation of the University's investment policy and operations.
3. Provides leadership for and collaborates with the University's Risk Management Team, CFO, Provost and other stakeholders to develop long term investment plans aligned with the University's strategic plans.
4. Directs the preparation and delivers verbal and written presentations to the Investment Committee on issues regarding the portfolio, including quarterly portfolio updates to the committee.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Investment, Sr. Manager

#### Job Summary

The job provides leadership and direction through managers professional staff responsible for the operational requirements of the Investment Office (IO), operational requirements of investments and assists the COO as necessary.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIINVM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Manages the planning, analysis and implementation of the University's investment policy and operations.
3. Collaborates with the University's Risk Management Team, CFO, Provost and other stakeholders to develop long term investment plans aligned with the University's strategic plans.
4. Advises the preparation and delivers verbal and written presentations to the Investment Committee on issues regarding the portfolio, including quarterly portfolio updates to the committee.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Investment, Manager

#### Job Summary

The job manages a team of professional staff responsible for the operations of the Investment Office (IO).

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIINVM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages the administration of the centralized investment data collection and analysis processes to support new and on-going investments, such as liquidity terms, holdings, and performance details.
2. Manages the development and implementation of process and system improvements to enhance the timeliness and quality of reporting and analysis used for investment decision making and portfolio management.
3. Builds relationships with multiple constituencies across the University as well as with external partners and audiences.
4. Manages the preparation and delivery of verbal and written presentations to the CIO and internal committees.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Investment, Sr. Specialist

#### Job Summary

The job utilizes specialized knowledge and breadth of expertise to lead activities within of the Investment Office (IO). Works independently to assist the COO as necessary.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIINVP4

#### Job Level

P4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

#### Responsibilities

1. Leads the office's strategic investment decision making. Uses in-depth financial expertise and collaborates with the CIO, Chief Risk Officer, and the investment team to create a long term and short term investment strategy framework.
2. Works independently to develop the Investment Policy Statement to achieve the University's goals. Collaborates with asset class specialists and risk management team to develop overall goals and strategy for the University investment funds. Tailors the strategy to the appropriate risk tolerance and liquidity needs for the University endowment and other investment funds.
3. Uses in-depth knowledge and expertise to assess all asset classes and investments to provide a unique overall perspective across the staff's investment strategies.
4. Collaborates with analytics team members and Client Services leadership to create and prototype new data products and product families. Provides leadership, guidance and expertise to the analyst team.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





### Job Profile: Investment, Specialist

#### Job Summary

The job uses best practices and knowledge to lead activities within the Investment Office (IO). Works independently to assist the COO as necessary.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIINVP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Implements the office's strategic investment decision making. Uses deep understanding of financial expertise and collaborates with the CIO, Chief Risk Officer, and the investment team to create a long term and short term investment strategy framework.
2. Works mostly independently to develop the Investment Policy Statement to achieve the University's goals. Collaborates with asset class specialists and risk management team to develop overall goals and strategy for the University investment funds. Tailors the strategy to the appropriate risk tolerance and liquidity needs for the University endowment and other investment funds.
3. Uses a deep understanding of financial management to assess all asset classes and investments to provide a unique overall perspective across the staff's investment strategies.
4. Collaborates with analytics team members and Client Services leadership to create and prototype new data products and product families.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Investment, Sr. Analyst

#### Job Summary

The job performs a range of activities based on the operational needs of the Investment Office (IO), using on-the-job knowledge while acquiring higher-level skills.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIINVP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Gains exposure to various asset classes through a scheduled analyst rotation.
2. Supports many facets of the investment process, including the selection and monitoring of external investment specialists across asset classes.
3. Sources and performs due diligence of potential new investments. Performs industry analysis to determine investment attractiveness of various investment strategies.
4. While the focus will be a on primary asset class, the job will also process information on CRSP indexes, alternative investments, long-term equity, joint venture investments, or administer loans and tracking the performance of them.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Investment, Analyst

#### Job Summary

The job performs a broad range of operational business activities based on the operational needs of the Investment Office (IO), using on-the-job knowledge while acquiring higher-level skills.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIINVP1

#### Job Level

P1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

#### Responsibilities

1. Focuses on a primary asset class, gaining exposure to various asset classes through a scheduled analyst rotation.
2. Supports some facets of the investment process, including the selection and monitoring of external investment specialists across asset classes.
3. Assists with sourcing and due diligence of potential new investments and performs industry analysis to determine investment attractiveness of various investment strategies.
4. While the focus will be a on primary asset class, the job may also process information on CRSP indexes, alternative investments, long-term equity, joint venture investments, or administer loans and tracking the performance of them.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Payroll, Sr. Director

#### Job Summary

The job provides leadership and direction through senior managers responsible for the payroll activities of the centralized University payroll function. Develops operational priorities and payroll practices in compliance with University policies and local, state, and federal laws. Oversees the timely distribution of employees' payroll checks and W-2 Forms.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPAYM5

#### Job Level

M5

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides divisional leadership and direction through senior managers. Is accountable for the performance and results of a unit. Gives input and executes sub-function strategy to achieve key University objectives that have campus-wide or institutional impact. Decisions are guided by functional strategy and objectives.

#### Responsibilities

1. Manages employees through senior managers responsible for payroll activities of the centralized University payroll function, serving regular and temporary faculty, staff, and students.
2. Develops and oversees operational priorities and effective payroll practices in compliance with University policies and local, state, and federal laws and regulations.
3. Establishes and provides leadership for annual payroll schedules and oversees the timely production and distribution of employees' payroll checks and W-2 Forms.
4. Oversees the teams' preparation of reports for governmental agencies, banks, and management.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Payroll, Sr. Manager

#### Job Summary

The job manages multiple teams of managers and professional staff responsible for the payroll activities of the centralized University payroll function. Develops operational priorities and payroll practices in compliance with University policies and local, state, and federal laws. Oversees the timely distribution of employees' payroll checks and W-2 Forms.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPAYM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages managers and professional staff responsible for payroll activities of the centralized University payroll function, serving regular and temporary faculty, staff, and students.
2. Develops operational priorities and effective payroll practices in compliance with University policies and local, state, and federal laws and regulations.
3. Develops annual payroll schedules and oversees the timely production and distribution of employees' payroll checks and W-2 Forms.
4. Ensures the teams' preparation of reports for governmental agencies, banks, and management.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Payroll, Manager

#### Job Summary

The job manages a team of professional staff responsible for payroll activities of the centralized University payroll function, which serves all regular and temporary faculty, staff, and students. Coordinates with the payroll staff to implement effective payroll practices, including preparing reports, in compliance with University policies and local, state, and federal laws. Ensures timely distribution of employees' payroll checks and W-2 Forms.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPAYM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages a team of professional staff within a payroll unit.
2. Monitors the execution of a variety of complex computation, documentation, and review of payroll wages and deductions for employees.
3. Manages the preparation and maintenance of disbursements, reports and statistics for government agencies.
4. Manages record retention functions.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Payroll, Supervisor

#### Job Summary

The job supervises a team of support staff responsible for payroll activities of the centralized University payroll function, which serves all regular and temporary faculty, staff, and students. Coordinates with the payroll staff to implement effective payroll practices, including preparing reports, in compliance with University policies and local, state, and federal laws. Ensures timely distribution of employees' payroll checks and W-2 Forms.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPAYM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Supervises a team of support staff within a payroll unit.
2. Supervises the execution of a variety of complex computation, documentation, and review of payroll wages and deductions for employees.
3. Supervises the preparation and maintenance of disbursements, reports and statistics for government agencies.
4. Maintains record retention functions.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



**Job Profile: Payroll, Business Sr. Coordinator**

**Job Summary**

The job leads business support activities within a centralized University payroll function. Works with the payroll staff to implement effective payroll practices, including preparing reports, in compliance with University policies and local, state, and federal laws. Provides timely distribution of employees' payroll checks and W-2 Forms, working autonomously within established procedures and practices.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☐ People Manager ☒ Individual Contributor

**Job Code**

FIPAYB4

**Job Level**

B4

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Has developed expertise in a variety of work processes or activities typically developed through a combination of job-related training and considerable on-the-job experience. Typically acts as a lead, coordinating the work of others - but not a supervisor. Works autonomously within established procedures and practices.

**Responsibilities**

1. Leads administration of bi-weekly and semi-monthly payroll activities while establishing open lines of communication. Updates employee payroll records in complex scenarios.
2. Uses depth of knowledge and experience to analyze a variety of payroll information for accurate payroll processing, audit compliance, taxation, and reporting and filings in compliance with federal and state regulations. Works autonomously within established procedures and practices.
3. Researches payroll discrepancies as they arise, using past experiences as a guide, and suggests procedural improvements for complicated issues.
4. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

**Experience**

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.





### Job Profile: Payroll, Business Coordinator

#### Job Summary

The job provides specialized business support within a centralized University payroll function. Works with the payroll staff to implement effective payroll practices, including preparing reports, in compliance with University policies and local, state, and federal laws. Provides timely distribution of employees' payroll checks and W-2 Forms, working autonomously within established procedures and practices.

#### FLSA Status

☐ Exempt ☒ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIPAYB3

#### Job Level

B3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Has developed specialized skills or is multi-skilled developed through job-related training and considerable on-the-job experience. Completes work with a limited degree of supervision. Likely to act as an informal resource for colleagues with less experience.

#### Responsibilities

1. Supports administration of bi-weekly and semi-monthly payroll activities while establishing open lines of communication. Updates employee payroll records in complex scenarios.
2. Uses knowledge and experience to analyze a variety of payroll information for accurate payroll processing, audit compliance, taxation, and reporting and filings in compliance with federal and state regulations. Works autonomously within established procedures and practices.
3. Researches payroll discrepancies as they arise, using past experiences as a guide.
4. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include vocational training, apprenticeships or the equivalent experience in related field (not typically required to have a four-year degree).

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Procurement, Director

#### Job Summary

The job provides leadership and direction through managers responsible for setting the sourcing strategies for the procurement of goods, services, and supplies, for internal or external use.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPRCM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Oversees and directs the teams responsible for the management of key categories of university-wide or enterprise-wide expenditures.
2. Provides leadership and management of teams that establish the strategic plans for sourcing, selection, contracting and management of university-wide or enterprise-wide sources of supply.
3. Interfaces with senior/executive leadership internally and within our affiliates, external supplier organizations and civic or governmental bodies.
4. Develops university-wide or enterprise-wide communication strategies to support the uniform adoption of the selected sourcing strategies.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Procurement, Sr. Manager

#### Job Summary

The job manages multiple related teams of managers and professional staff responsible for the procurement of goods, services, and supplies, for internal or external use. Manages relationships with suppliers and develops plans to acquire favorable terms, volume discounts, and long-term contracts.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPRCM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Ensures the negotiation and administration of commercial contracts in accordance with University policies and procedures, federal, state and local laws and regulations, and best business practices.
2. Reviews the team's activities related to contract administration, resolution of post-award issues, execution of amendments, monitoring of supplier performance, and contract deliverables.
3. Develops correspondence with University faculty and staff with regard to purchases of software, equipment and services.
4. Advises the team's priorities for requests for proposal, requests for information, and requests for quote processes.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Procurement, Manager

#### Job Summary

The job manages a team of professional staff responsible for the procurement of goods, services, and supplies, for internal or external use. Manages relationships with suppliers and develops plans to acquire favorable terms, volume discounts, and long-term contracts.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPRCM2

#### Job Level

M2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

#### Responsibilities

1. Manages the negotiation and administration of commercial contracts in accordance with University policies and procedures, federal, state and local laws and regulations, and best business practices.
2. Manages the team's activities related to contract administration, resolution of post-award issues, execution of amendments, monitoring of supplier performance, and contract deliverables.
3. Guides correspondence with University faculty and staff with regard to purchases of software, equipment and services.
4. Establishes the team's priorities for requests for proposal, requests for information, and requests for quote processes.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Procurement, Supervisor

#### Job Summary

The job supervises and monitors a team of support staff responsible for the procurement of goods, services, and supplies, for internal or external use. Manages relationships with suppliers and develops plans to acquire favorable terms, volume discounts, and long-term contracts.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FIPRCM1

#### Job Level

M1

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

#### Responsibilities

1. Prepares the negotiation and administration of commercial contracts in accordance with University policies and procedures, federal, state and local laws and regulations, and best business practices.
2. Supervises the team's activities related to contract administration, resolution of post-award issues, execution of amendments, monitoring of supplier performance, and contract deliverables.
3. Prepares correspondence with University faculty and staff with regard to purchases of software, equipment and services.
4. Plans the team's priorities for requests for proposal, requests for information, and requests for quote processes.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Procurement, Sr. Specialist

### Job Summary

Requires specialized depth and/or breadth of expertise. Interprets internal or external business issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead functional teams or projects.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIPRCP4

### Job Level

P4

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Requires specialized depth and/or breadth of expertise. Interprets internal or external University issues and recommends best practices. Solves complex problems; takes a broad perspective to identify innovative solutions. Works independently, with guidance in only the most complex situations. May lead cross-functional or divisional teams or projects.

### Responsibilities

1. Develop supplier relationships that capture and leverage the University's and its affiliates total expenditures in regards to a specific service or commodity with cost effective, innovative solutions for identified audience. Remains abreast of emerging trends and risks.
2. Lead strategy and sourcing contract initiatives in the development of contracts for assigned procurement commodities in collaboration with key stakeholders. Conducts agreement formation, review and negotiation to ensure best value. Evaluates and recommends approvals for utilization plans. Works independently with internal and external clients. Uses best practices and in-depth knowledge to review and monitors the goals and objectives of the Finance and Administration department to ensure the monthly, quarterly, and annual goals are achieved.
3. Performs final commitment action for procurements under standard procedures of the University. Is authorized to perform discretionary judgment decisions based upon pricing analysis up to established dollar threshold.
4. Implements procedures to ensure that minority-owned business enterprises (MBEs), women-owned business enterprises (WBEs), and local residents are given maximum opportunities to compete for contracts and projects. Evaluates solicitations and coordinates with project managers to ensure that M/WBEs have maximum opportunities to bid on construction projects.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Procurement, Specialist

#### Job Summary

The job manages the creation and execution of purchase orders for the procurement of goods, services and supplies for customer-related business processes or for internal use. Works independently to negotiate favorable terms, volume discounts, and long-term contracts with suppliers.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIPRCP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Develops cost containment initiatives and provides continuous maintenance of processes and systems in support of procurement needs.
2. Evaluates and recommends approvals for utilization plans. Implements the evaluation process which includes a desk audit review of documentation submitted by contractors.
3. Works independently with internal and external clients. Uses best practices and in-depth knowledge to review and monitors the goals and objectives of the Finance and Administration department to ensure the monthly, quarterly, and annual goals are achieved.
4. Implements procedures to ensure that minority-owned business enterprises (MBEs), women-owned business enterprises (WBEs), and local residents are given maximum opportunities to compete for contracts and projects. Evaluates solicitations and coordinates with project managers to ensure that M/WBEs have maximum opportunities to bid on construction projects.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Procurement, Sr. Analyst

#### Job Summary

The job uses its understanding of key University and business drivers to perform a range of purchasing activities. Communicates favorable terms, volume discounts and long-term contracts with suppliers, and prepares and processes requisitions and purchase orders for the procurement of goods, services and supplies for customer-related business processes or for internal use with a moderate level of guidance.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIPRCP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Provides professional support to the purchasing of supplies, equipment, and services related to procurement. Performs preliminary documentation and analysis of large dollar purchase requests. Negotiates non-complex contract terms with vendors within procedures and responsibilities as assigned.
2. Identifies vendors/suppliers, solicits and analyzes quotations, selects or recommends vendors, and interviews perspective vendors with a moderate level of guidance. Performs final commitment action for procurement under standard procedures.
3. Monitors routine contract executions of buyer personnel. Conducts periodic review of contractors' performance under University-wide agreements. Performs purchases of commodities and services as required, acquiring higher-level of knowledge and skills.
4. Maintains vendor relationships including creation, maintenance, and review of contracts and purchase orders.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.





## Job Profile: Procurement, Analyst

### Job Summary

The job performs routine assignments related to a range of purchasing activities. Communicates favorable terms, volume discounts and long-term contracts with suppliers, and prepares and processes requisitions and purchase orders for the procurement of goods, services and supplies for customer-related business processes or for internal use with a moderate/high level of guidance.

### FLSA Status

☐ Exempt ☒ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FIPRCP1

### Job Level

P1

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Performs routine assignments in the entry level to a professional job progression. Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts. Develops competence by performing structured work assignments. Uses existing procedures to solve routine or standard problems. Receives instruction, guidance and direction from others.

### Responsibilities

1. Provides professional support to the purchasing of supplies, equipment, and services related to procurement. Performs preliminary documentation and analysis of large dollar purchase requests. Negotiates non-complex contract terms with vendors within procedures and responsibilities as assigned.
2. Solicits and analyzes quotations, selects or recommends vendors, and interviews perspective vendors with a moderate level of guidance. Performs final commitment action for procurement under standard procedures.
3. Assists and monitors routine contract executions of buyer personnel. Conducts periodic review of contractors' performance under University-wide agreements. May perform purchases of commodities and services as required, acquiring higher-level of knowledge and skills.
4. Maintains vendor relationships, including creation, maintenance, and review of contracts and purchase orders.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through less than 2 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



**Job Profile: Risk Management, Sr. Director**

**Job Summary**

The job provides leadership and direction through senior managers to identify, evaluate and plan strategies for the University's insurance programs in order to maximize protection of assets at the most economical rates and minimize effects of fortuitous loss.

**FLSA Status**

☒ Exempt ☐ Non-Exempt

**Role Impact**

☒ People Manager ☐ Individual Contributor

**Job Code**

FIRSKM5

**Job Level**

M5

**Job Family Description**

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

**Job Level Description**

Provides divisional leadership and direction through senior managers. Is accountable for the performance and results of a unit. Gives input and executes sub-function strategy to achieve key University objectives that have campus-wide or institutional impact. Decisions are guided by functional strategy and objectives.

**Responsibilities**

1. Directs the University's insurance programs in order to maximize protection of assets at the most economical rate and minimize effects of fortuitous loss.
2. Manages employees through senior managers. Oversees the development of performance goals, establishes the structure for allocating resources and assessing division or University policies.
3. Develops and directs risk management strategies and policies which identify, assess and mitigate the impact of risks originating from or impacting the University's portfolio of activities/interests. Manages the analysis and reporting of risk management strategies to ensure compliance with University objectives.
4. Oversees the negotiation of contract insurance requirements as necessary.
5. Performs other related work as needed.

**Education, Experience and Certifications**

**Education**

- Minimum requirements include a college or university degree in related field.

**Experience**

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

**Licenses and Certifications**

- None.



### Job Profile: Risk Management, Specialist

#### Job Summary

The job works independently to identify, evaluate and plan strategies for the University's insurance programs in order to maximize protection of assets at the most economical rates and minimize effects of fortuitous loss.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIRSKP3

#### Job Level

P3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

#### Responsibilities

1. Performs specialized analysis to identify, evaluate and plan strategies for the University's insurance programs in order to maximize protection of assets at the most economical rates and minimize effects of fortuitous loss.
2. Prepares insurance renewal strategy plan, including goals and expected outcomes. Independently reviews insurance programs for effectiveness of coverage and to reduce insurance costs and losses. Prepares insurance specifications, receives and reviews insurance proposals, performs cost analyses and recommends insurance purchases. Reviews insurance policies for accuracy and follows-up for corrections. Implements procedures for reporting changes and claims to insurers that are compliant with insurance policy requirements. Monitors insurance company financial strength on current and expired insurance to identify possible failures and manage claims against insolvent insurers.
3. Provides basic safety and loss prevention services complementing the services provided by staff of the Office of Environmental Health and Safety: conducts or assists in investigations, receives and analyzes recommendations, prepares responses and follows-up for completion of agreed upon action plans.
4. Ensures University contracts contain appropriate insurance requirements. Negotiates contract insurance requirements as necessary.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Risk Management, Sr. Analyst

#### Job Summary

The job performs a range of operational activities to implement policies which identify, assess, and mitigate the impact of risks to the University unit's portfolio of activities/interests. Uses job-related experience and knowledge of the University to perform routine analyses and ensure compliance with University objectives.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FIRSKP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Identifies, evaluates, and plans strategies for the University's insurance programs in order to maximize protection of assets. Uses knowledge of the University to assist in the preparation of insurance renewal strategy plans. Reviews insurance programs for effectiveness of coverage and potential savings.
2. Reviews insurance proposals, performs cost analyses, and recommends insurance purchases. Reviews insurance policies for accuracy and follows-up for corrections.
3. Monitors insurance company financial strength on current and expired insurance to identify possible failures. Provides basic safety and loss prevention services complementing the services provided by staff of the Office of Environmental Health and Safety.
4. Helps to develop insurance budget and monitors performance to ensure costs are properly recorded and within budget.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Sponsored Programs, Director

#### Job Summary

The job provides leadership and direction through managers within the University Research Administration departments. Directs the administration and coordination of various grants and contracts for the support of research, training, and other sponsored activities at the University. Oversees the development of research compliance education programs.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FISPGM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Manages department staff through subordinates, usually other managers. Establishes performance goals, conducts training sessions, allocates resources and assesses policies for the related departments managed.
2. Oversees and is accountable for the performance and results of multiple sponsored programs departments.
3. Establishes and develops systems to sustain accounts in the University's accounting system, to complete required reports to sponsors and grantors, and to comply with applicable grant terms, regulations, and rules.
4. Ensures departmental compliance with all policies regarding department personnel, sponsored award activity, accounting, and individual and federal restrictions on expenditures.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Sponsored Programs, Sr. Manager

#### Job Summary

The job manages multiple related teams of managers and professional staff within the University Research Administration departments. Directs the administration and coordination of various grants and contracts for the support of research, training, and other sponsored activities at the University. Recommends the development of research compliance education programs.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FISPGM3

#### Job Level

M3

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

#### Responsibilities

1. Manages department staff through subordinates, usually other managers and professional staff. Establishes performance goals, conducts training sessions, allocates resources and assesses policies for the related departments managed.
2. Is accountable for the performance and results of multiple sponsored programs departments.
3. Develops systems to sustain accounts in the University's accounting system, to complete required reports to sponsors and grantors, and to comply with applicable grant terms, regulations, and rules.
4. Maintains departmental compliance with all policies regarding department personnel, sponsored award activity, accounting, and individual and federal restrictions on expenditures.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Sponsored Programs, Manager

### Job Summary

The job manages a team of professional staff responsible for the day-to-day activities of University Research Administration. Supervises the administration and coordination of various grants and contracts for the support of research, training, and other sponsored activities at the University. Coordinates the development of research compliance education programs.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FISPGM2

### Job Level

M2

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Manages professional employees and/or supervisors. Is accountable for the performance and results of a team within own discipline. Adapts departmental plans and priorities to address resource and operational challenges. Decisions are guided by policies, procedures and business plan; receives guidance from manager. Provides technical guidance to employees, colleagues and/or customers.

### Responsibilities

1. Manages the review of applications and assists faculty and administrative staff in the preparation of applications for compliance with sponsor and institutional policies, procedures, guidelines, and regulations.
2. Manages employees by establishing annual performance goals, allocating resources, assessing annual performance. Managed employees are responsible for grant and contract administration.
3. Reviews and interprets language in contracts and grants to determine conformity and/or conflict with University policies. Discusses award terms and conditions acceptable to the University. Ensures post-award activities.
4. Ensures appropriate evidence of approvals so commitments made in proposals can be honored, to protect the University from harm, loss of income, or liability.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

#### Licenses and Certifications

- Certified Research Administrator (CRA).



## Job Profile: Sponsored Programs, Supervisor

### Job Summary

The job supervises a team of support staff responsible for the day-to-day activities of University Research Administration. Supervises the administration and coordination of various grants and contracts for the support of research, training, and other sponsored activities at the University. Coordinates the development of research compliance education programs.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FISPGM1

### Job Level

M1

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Supervises the daily activities of business or technical support or operations team. Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors. Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager. Typically does not perform the work supervised.

### Responsibilities

1. Reviews applications and assists faculty and administrative staff in the preparation of applications for compliance with sponsor and institutional policies, procedures, guidelines, and regulations.
2. Supervises a staff responsible for grant and contract administration.
3. Reviews and interprets language in contracts and grants to determine conformity and/or conflict with University policies. Discusses award terms and conditions acceptable to the University. Coordinates post-award activities.
4. Confirms appropriate evidence of approvals so commitments made in proposals can be honored, to protect the University from harm, loss of income, or liability.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

#### Licenses and Certifications

- Certified Research Administrator (CRA).





## Job Profile: Sponsored Programs, Specialist

### Job Summary

The job uses best practices and knowledge of activities to support the functional areas of University Research Administration. Supports research, training, and other sponsored activities at the University, building upon knowledge of the University, processes, and customers. Assists in the development of research compliance education programs.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☐ People Manager ☒ Individual Contributor

### Job Code

FISPGP3

### Job Level

P3

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Requires in-depth knowledge and experience. Uses best practices and knowledge of internal or external University issues to improve products or services. Solves complex problems; takes a new perspective using existing solutions. Works independently, receives minimal guidance. Acts as a resource for colleagues with less experience.

### Responsibilities

1. Through interaction with a variety of federal and non-federal funding agencies, faculty, and staff, provides professional assistance with full authority in the administration and coordination of proposals and awards in research and training.
2. Provides faculty and administrators with application preparation, analyzing possible solutions to problems that arise using standard procedures. Reviews, interprets, and negotiates contract and grant terms to determine compliance and/or conflict with federal regulations and procedures.
3. Guides correspondence between the agency and University community to obtain and process necessary pre and post-award information. Reviews and processes various pre and post-award activities.
4. With limited guidance, helps to obtain sponsor approvals for major changes to project work scope, etc. Transmits proposals and manages post award administration, gathers and submits closeout documentation, and maintains records. Ensures completeness and accuracy and coordinates any internal controls prior to the submission of documents to awarding agency.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 5-7 years of work experience in a related job discipline.

#### Licenses and Certifications

- None.



### Job Profile: Sponsored Programs, Sr. Analyst

#### Job Summary

The job executes a range of activities to support the functional areas of University Research Administration. Supports research, training, and other sponsored activities at the University, building upon knowledge of the University, processes, and customers. Assists in the development of research compliance education programs.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☐ People Manager ☒ Individual Contributor

#### Job Code

FISPGP2

#### Job Level

P2

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Requires knowledge and experience in own discipline; still acquiring higher-level knowledge and skills. Builds knowledge of the organization, processes and customers. Solves a range of straightforward problems. Analyzes possible solutions using standard procedures. Receives a moderate level of guidance and direction.

#### Responsibilities

1. Through interaction with a variety of federal and non-federal funding agencies, faculty, and staff, provides professional assistance with the administration and coordination of proposals and awards in research and training.
2. Provides faculty and administrators with application preparation, analyzing possible solutions to problems that arise using standard procedures. Reviews, interprets, and negotiates contract and grant terms to determine compliance and/or conflict with federal regulations and procedures.
3. Maintains correspondence between the agency and University community to obtain and process necessary pre- and post-award information. Reviews and processes various pre- and post-award activities.
4. With moderate guidance, helps to obtain sponsor approvals for major changes to project work scope, etc. Transmits proposals and manages post award administration, gathers and submits closeout documentation, and maintains records. Ensures completeness and accuracy and coordinates any internal controls prior to the submission of documents to awarding agency.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 2-5 years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



### Job Profile: Treasury, Director

#### Job Summary

The job provides leadership and direction through managers and directs the University's treasury activities, including cash balances, credit balances, liquidity positions, and debt and capital management. Provides quarterly forecasting estimates and manages relationships with on-campus banking partners. Works with University leadership, long term financial planning working groups, and Board of Trustees committees.

#### FLSA Status

☒ Exempt ☐ Non-Exempt

#### Role Impact

☒ People Manager ☐ Individual Contributor

#### Job Code

FITREM4

#### Job Level

M4

#### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

#### Job Level Description

Provides leadership and direction through managers. Is accountable for the performance and results of related departments. Executes functional plans and contributes to the development of unit strategy. Decisions are guided by division, school or sub-function strategy and priorities.

#### Responsibilities

1. Manages employees through subordinates, usually other managers. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Directs the planning, financing and feasibility analysis to support the University's treasury and capital investment decision making.
3. Collaborates with the University's Budget Office/Capital Budgeting Team, CFO, Provost and other stakeholders to develop long term financial plans aligned with the University's strategic plans.
4. Provides staff support to the Financial Planning Committee of the Board of Trustees.
5. Performs other related work as needed.

#### Education, Experience and Certifications

##### Education

- Minimum requirements include a college or university degree in related field.

##### Experience

- Minimum requirements include knowledge and skills developed through 10+ years of work experience in a related job discipline.

##### Licenses and Certifications

- None.



## Job Profile: Treasury, Sr. Manager

### Job Summary

The job manages multiple teams of managers and professional staff responsible for the University's treasury activities, including cash balances, credit balances, liquidity positions, and debt and capital management. Develops department plans to provide quarterly forecasting estimates. Manages relationships with on-campus banking partners, University leadership, long term financial planning working groups, and Board of Trustees committees.

### FLSA Status

☒ Exempt ☐ Non-Exempt

### Role Impact

☒ People Manager ☐ Individual Contributor

### Job Code

FITREM3

### Job Level

M3

### Job Family Description

Responsible for managing financial operations, including accounting, budgets and financial controls, payroll, purchasing, risk management, or treasury for the University. Sets financial strategy that impacts University functions such as grant awards, clinical research, and investments of capital.

### Job Level Description

Provides leadership to managers and professional staff. Is accountable for the performance and results of multiple related teams. Develops departmental plans, including business, operational and/or organizational priorities. Decisions are guided by resource availability and functional objectives.

### Responsibilities

1. Manages treasury and cash management managers and professional staff. Establishes performance goals, allocates resources and assesses policies for direct subordinates.
2. Develops strategy to provide quarterly forecasting estimates and ad hoc financial analyses. Develops a treasury dashboard to show debt portfolio metrics, interest rates, operating and non-operating lines of credit.
3. Oversees the University's daily cash balances, liquidity position, and credit balance. Manages the creation of bank accounts, closing of bank accounts and authorized signers.
4. Maintains relationships with on-campus banking partners, banks, rating agencies, underwriters, and financial advisors.
5. Performs other related work as needed.

### Education, Experience and Certifications

#### Education

- Minimum requirements include a college or university degree in related field.

#### Experience

- Minimum requirements include knowledge and skills developed through 7+ years of work experience in a related job discipline.

#### Licenses and Certifications

- None.