**Financial Practitioner I Standard Job Description**

**Classification Title:** Financial Practitioner I

**FLSA Exemption Status:**Non-Exempt

**Pay Grade:** 8

**Job Description Summary:**

The Financial Practitioner I, under general supervision, executes complex clerical, accounting, financial and customer service duties.

**Essential Duties/Tasks:**

**40% Customer Service and Support**

* Provides expertise and customer service to the University community.
* Assists internal and external customers with inquiries regarding vendor setup, documentation submission, and status updates.
* Responds to questions concerning student and loan accounts via the CRM system.
* Serves as a resource to staff and helps resolve questions related to financial processes and vendor setup.
* Provides backup support for payment inquiries from TAMU System Members and external vendors.
* Coordinates with vendors and departments to ensure smooth vendor setup processes and documentation.
* Responds promptly to vendor and departmental inquiries related to payment or invoice research.

**20% Vendor and Financial Data Management**

* Manages the process for creating and maintaining vendor records for Texas A&M University System Members.
* Enters accurate direct deposit information into the FAMIS and TINS systems.
* Reviews W9 forms for IRS Website compliance and ensures required documentation is received from departments.
* Sets up and maintains supplier records in AggieBuy and Concur systems within a 24-hour turnaround.
* Monitors and ensures a low error rate for data entry, maintaining a performance standard of 1% or lower.
* Tracks and updates card stock and printer supplies to ensure system reliability.

**10% Analysis and Reporting**

* Performs research for discrepancies and reports findings to ensure accurate vendor information.
* Evaluates and analyzes complex records to verify completeness and compliance with established standards.
* Audits reports for accuracy of coding information and helps develop new reports as needed.

**10% Training and Development**

* Serves as the primary trainer for new staff in the vendor setup process.
* Ensures communication of any changes to procedures and processes to all relevant staff.
* Supports and mentors new employees and student workers in navigating complex financial systems.

**20% Duty Title (for the department's use)**

* Remaining Percentage Can Be Determined by Department to Meet Business Needs or Can Be Incorporated into Percentages Above.

**Qualifications:**

**Required Education:**

* High school graduation or any equivalent combination of education and experience.

**Required Experience:**

* Seven years of experience in a specialized financial field such as accounts payable, payroll or student accounts.

**Required Licenses and Certifications:**

* None

**Required Knowledge, Skills, and Abilities:**

* Ability to multitask and work cooperatively with others.
* Knowledge of word processing and spreadsheet software.
* Oral and written communication skills.

**Additional Information:**

**Machines and Equipment:**

* Computer
* Telephone

**Physical Requirements:**

* None

**Other Requirements and Factors:**

* This position is security sensitive
* This position requires compliance with state and federal laws/codes and Texas A&M University System/TAMU policies, regulations, rules and procedures
* All tasks and job responsibilities must be performed safely without injury to self or others in compliance with System and University safety requirements

**Is this role ORP Eligible? If so, it needs to meet the criteria on the** [**Rules and Regulations of the Texas Higher Education Coordinating Board**](https://reportcenter.highered.texas.gov/reports/data/user-friendly-version-of-ch-25/)**.**

[ ]  **Yes**

[x]  **No**

**Does this classification have the ability to work from an alternative work location?**

[ ]  **Yes**

[x]  **No**