**Financial Specialist I Standard Job Description**

**Classification Title:** Financial Specialist I

**FLSA Exemption Status:**Non-Exempt

**Pay Grade:** 6

**Job Description Summary:**

The Financial Specialist I, under supervision, provides general clerical, accounting, and customer service support duties.

**Essential Duties/Tasks:**

**40% Customer Service and Financial Support**

* Assists walk-in customers with questions regarding their student and/or loan accounts.
* Serves as a resource in educating departmental personnel on financial procedures.
* Coordinates and resolves issues related to discrepancies in financial records.
* Provides timely assistance in answering emails and phone calls within specified timelines.

**20% Financial Data Management and Compliance**

* Prepares and distributes itemized statements, letters, forms, and other financial
* Invoices before the payment due date, ensuring compliance with relevant financial guidelines.
* Researches and resolves problems and discrepancies related to financial transactions.
* Applies and enforces financial rules and regulations to ensure accuracy and compliance.

**10% Financial Documentation and Reporting**

* Maintains financial files and records in an organized manner.
* Prepares and processes Loan Extension Agreements and Automated Clearing House
* Forms for past due accounts.
* Assists in the preparation of reports and spreadsheets as needed.

**10% Accounts Payable and Vendor Relations**

* Completes AggieBuy requisitions accurately and within designated time frames.
* Works with vendors and university departments to resolve payment and documentation issues.
* Maintains efficient and organized communication with vendors to ensure timely processing.

**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:**

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

**Required Licenses and Certifications:**

* None

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

* Ability to multitask and work cooperatively with others.

**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**

**No**

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

**Yes**

**No** 