

YAKIMA COUNTY, WASHINGTON
CLASS SPECIFICATION
CLASS TITLE: Financial Specialist I

BAND: B	GRADE: 2	SUBGRADE: 1	CLASS CODE: J23-2121
DEPARTMENT: Varies	ACCOUNTABLE TO: Varies	JOB FAMILY: Financial	OVERTIME STATUS: Non-Exempt

JOB SUMMARY: The Financial Specialist I performs specialized accounting support activities involving the receiving, reviewing, processing, monitoring, and auditing of a variety of documents, deposits, payments, grant applications, contracts, or collections; responds to questions and inquiries regarding the special area of assignment.

DISTINGUISHING CHARACTERISTICS:

The Financial Specialist I class is the first level of a five-level accounting support classification series. The Financial Specialist I class is distinguished from the Financial Technician class by specialized assignments requiring a higher degree of independence and accountability. The technical financial classification series is distinguished from the office support classification series by duties which require greater accounting knowledge and skill. The technical financial classification series is distinguished from the professional financial classification series by duties based on knowledge of a particular financial area rather than a broad general professional knowledge of accounting principles and practices.

DUTY NO.	ESSENTIAL DUTIES: (These duties are a representative sample: (Position assignments may vary.)	BAND/ GRADE
1	Calculates data for payroll, taxes, personal or real property value and/or accounts payable or receivable functions; verifies accuracy of others' calculations; and processes changes or corrections as needed.	B2
2	Tracks and maintains assigned accounts, contracts, and terms of agreement; prepares payment and/or collection plans; tracks debt collection activities; and reconciles records for tracking activities prepares a variety of related financial system reports and technical documents.	B2
3	Audits, validates/reviews approves for form, legal and procedural compliance of various documents prepared or entered into a computer system; drafts and implements operational guidelines to ensure compliance with policies and procedures.	B2
4	Responds to questions and provides guidance in area of specialty.	B2
5	Reviews bankruptcy documents to ensure claims are filed for reimbursement and accounts are monitored upon completion of bankruptcy; reviews records for adjustments to determine payments that can be applied or refunded.	B2
6	Types or prepares a variety of correspondence and documents such as payroll documents, requisitions, bank deposits, tax documents/information, claims, assessments, manual warrants, grant applications, personal or real property value notices and collection notices	B2
7	Provides customer service by greeting customers and provides technical support, explaining the issue at hand and resolving issues for services received or amount billed.	B2
8	Performs the work of the lower level classification as needed.	A1
9	Performs other duties as required.	

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Knowledge of: (Position requirements at entry):

- Basic accounting theories and principles;
- General knowledge of financial specialty assignment area;
- Basic mathematics;
- Office practices;
- Customer service techniques;
- Phone etiquette.

Skills (Position requirements at entry):

- Reviewing and verifying accounting information;
- Tracking debt collection activities;
- Preparing and processing documents related to assignment area function;
- Performing a variety of calculations for payroll, taxes and invoices;
- Paying attention to detail and accuracy;
- Using office equipment such as phones, copiers, calculators, and fax machines;
- Using computers and related software applications;
- Establishing and maintaining effective interpersonal relationships at all organizational levels and with the public;
- Communication, both oral and written, sufficient to exchange or convey information and to receive work direction.

Training and Experience (Position requirements at entry):

High School Diploma or General Equivalency Diploma (GED) and three years of general accounting support or related experience including six months in area of specialty; or an equivalent combination of education and experience which provides knowledge, skills and abilities sufficient to successfully perform the essential duties of the job.

Licensing Requirements (position requirements at entry):

Some positions may require a valid US Driver's license;

Successful completion of a criminal, financial investigation and / or general employment verification;

Successful completion of specialty training and/or possession of specialty related certification is required within six months of appointment.

Working Conditions: Position may have the potential exposure to the following:

Environment: Pathogen exposure work in locked down facilities, exposure to hostile/angry individuals, work outside of standard business hours and multiple work locations;

Physical Demands: bending, carrying, handling, lifting, reaching, sitting, standing, walking, fingering, balancing, climbing, crawling, crouching, kneeling, hearing, smelling, talking, visual acuity.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting, most of the time.

Intellectual Demands: ability to multitask, confidentiality, ability to work under pressure, ability to articulate and communicate in conversations, ability to follow written and verbal instruction.

Classification History:

New Class: 9/1/97

Revised: 1/1/99

Revised: 07/01/21

Revised: 12/01/22