

## **Fiscal Services Coordinator**

### **JOB FAMILY DEFINITION**

This classification falls within the Fiscal Services Support Job Family, encompassing a range of work in which incumbents are responsible for providing accounting and procurement operations and transaction processing support functions of the Judicial Council and on behalf of client courts. This class specification represents the type and level of work performed recognizing that specific work assignments may differ from one unit to another and from one incumbent to another.

### **CLASS SUMMARY**

The Fiscal Services Coordinator class encompasses two types of work: specialized accounting operations in a specific fiscal area, and/or transaction processing and support for complex accounts payables; or formal procurement for goods and routine services. In the latter role, incumbents serve as an official judicial branch procurement representative in the formal procurement for goods and routine services.

### **DISTINGUISHING CHARACTERISTICS**

The Fiscal Services Coordinator is distinguished from the Fiscal Services Specialist in that the Fiscal Services Coordinator performs more complex accounting operations and/or system support tasks in a specialized area, exclusively or in addition to other tasks. This specialized accounting support performed by the Fiscal Services Coordinator includes, but is not limited to, assisting with month-end and year-end closing activities; coordinating the financial document routing/approval process, and more complex accounts payable transactions. The Fiscal Services Coordinator also carries out formal procurement activities as the official judicial branch representative, as assigned.

The Fiscal Services Coordinator is distinguished from the Fiscal Services Support Supervisor in that the latter supervises four or more Judicial Council staff.

### **EXAMPLES OF ESSENTIAL DUTIES** *(The duties listed are illustrative only and represent the core areas of responsibilities; specific position assignments will vary depending on business needs.)*

- Audits, reconciles, and/or processes a variety of financial transactions including, but not limited to, complex payables, contract dollar amounts, purchase order/requisition amounts, journal entries, and overall coordination of the financial document routing/approval process.
- Prepares and posts journal entries; balances and makes adjusting entries.
- Assists with month-end closing and year-end closing activities and reconciliations.
- Performs research and develops ad-hoc and standard reports.
- Coordinates the formal procurement of goods and routine services and issues purchase orders, as assigned (see “Examples of Position Specific Responsibilities” section for more detail).
- Tracks and monitors status of expenditures, and/or procurement activities.
- Responds to and researches questions from staff, customers, and/or vendors.
- Ensures compliance with Judicial Council, state, and federal policies, procedures, laws, and regulations.

- Uses electronic spreadsheet records and spreadsheets to perform research of financial and procurement information regarding items such as, but not limited to, ranking of procurement responses.
- Provides training to internal and/or external clients in assigned area.
- Provides orientation and guidance to new staff, as assigned.
- Performs other duties of a similar nature and level as assigned.

**EXAMPLES OF POSITION SPECIFIC RESPONSIBILITIES** *(Illustrative Only)*

Positions assigned to accounting operations support areas may be responsible for:

- Preparing and posting journal entries; assisting with month-end closing, reconciliation, and year-end closing activities, as assigned;
- Preparing taxable travel documents for State Controller’s Office;
- Reviewing the invoice documents processed for specialized programs and complex payables for accuracy and validity against backup documentation;
- Critiquing proposed changes in travel or business meal policy;
- Preparing and making presentations on accounts payable procedures, policies, and system aspects;
- Reviewing cash transactions and researching variances, as assigned; and
- Completing monthly and year-end 1099 reconciliations, as assigned.

Positions assigned to procurement may be responsible for:

- Researching, preparing, and distributing solicitation requests for bids for goods and routine services;
- Collecting, compiling, and evaluating solicitation responses;
- Preparing, creating, amending, and distributing approved purchase orders;
- Monitoring maintenance and acquisition of common agency-wide equipment such as cell phones, copiers, and other office equipment; and
- Coordinating central shared fleet reservations, as assigned.

**MINIMUM QUALIFICATIONS**

**EDUCATION AND EXPERIENCE**

Three (3) years of accounting experience, including some experience in area of assignment (such as procurement, accounting operations and bookkeeping duties for accounts payable, and general ledger).

*OR*

Associate’s degree, preferably in accounting or business-related field, and one (1) year of accounting experience, including some experience in area of assignment (such as procurement, accounting operations and bookkeeping duties for accounts payable, and general ledger). *Additional directly related experience and/or education may be substituted on a year-for-year basis.*

**OR**

One year as a Fiscal Services Specialist with the Judicial Council of California or one year of experience performing the duties of a class comparable in the level of responsibility to that of a Fiscal Services Specialist in a California Superior Court or California state-level government entity.

**LICENSING AND CERTIFICATIONS**

- None

### **KNOWLEDGE OF**

- Principles, practices, and methods of financial record keeping;
- Principles, practices, and methods of governmental accounting;
- Basic contract administration, as assigned;
- Public procurement practices and methods, as assigned;
- Contract and purchasing terminology and its application, as assigned;
- Negotiation techniques, as assigned;
- Financial transaction workflow and business process for one or more of the following: procurement, payables, general ledger, receivables, contracts;
- Business math concepts;
- Customer service principles;
- Applicable work rules and policies; and
- Applicable business equipment and desktop applications.

### **SKILL IN**

- Reviewing financial documents for completeness and accuracy;
- Posting, balancing, and/or reconciling financial records;
- Organizing and communicating financial data in a comprehensive and simple format;
- Researching, reviewing, and compiling financial data;
- Developing and making basic training presentations about transaction processes;
- Preparing documents and correspondence;
- Providing customer service;
- Exercising tact and diplomacy;
- Organizing, prioritizing, and coordinating multiple tasks in order to meet assigned deadlines;
- Attention to detail;
- Utilizing a computer, relevant software applications, and/or other equipment as assigned;
- Effectively communicating; and
- Maintaining effective working relationships with colleagues, customers, and the public.

### **WORKING CONDITIONS, ADA AND OTHER REQUIREMENTS**

The Judicial Council is an equal opportunity employer. The Judicial Council will comply with its obligations under the law to provide equal employment opportunities to qualified individuals with disabilities.

Positions in this class typically require: sitting, walking, reaching, standing, grasping, pushing, pulling, lifting, fingering, kneeling, crouching, stooping, seeing, hearing, talking, and repetitive motions.

Light Work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.

Incumbents generally work in a typical office environment with adequate light and temperature. The Judicial Council will make all reasonable efforts to minimize the need for employees to travel by taking advantage of virtual conferencing tools as much as possible. However, positions in this class may require local and statewide travel as necessary.

**Please Note:** *The Judicial Council classifies work based on organizational need. The distinguishing characteristics, essential duties and minimum qualifications described in this specification relate to the body of work required and not to the attributes of an incumbent assigned to perform the work.*