

Position Description Form (PD 102 CB) for ADMINISTRATIVE SUPPORT Career Banded Positions

Use this form only for positions that fall within the guidelines of Administrative Support. Save this file to your local drive and then open it in MS Word. Utilize the various hyperlinks provided within the document to assist with its completion. To access the hyperlinks, hold down the <CTRL> key and click on the blue text. After visiting a "Help Documentation" link, close that link to minimize the number of windows open on your desktop.

THIS SIDE FOR HUMAN RESOURCES OFFICE USE ONLY		Based on this position's role and the Band Distinctions, place an 'X' in the box beside the recommended Career Band for this position	
Approved Career Band	Specialist	Administrative Support Associate	<input checked="" type="checkbox"/> Administrative Support Specialist
Approved Level	Journey	Administrative Support Supervisor	Executive Assistant
Effective Date			
Reviewing Analyst		No Change – Updating Position description	

Position Demographic Information		
Name of Current Employee	Position Number	"WORKING" Title of position
	9540	Billing Specialist
Current Classification (or Career Banded) Title of this position	Division	College or Department
Accounting Clerk V	Business Affairs	Facilities Management
Name of Immediate Supervisor	Supervisor's Position Title & Number	Departmental Sub Unit / Section
	Admin. Office III 9525	Facilities Business Office
Location of Workplace (Building, Room Number)	Work Hours (i.e. 8:00 – 5:00pm, etc.)	Work Schedule (i.e. Mon. – Fri., rotating shifts, etc.)
Facilities Mgmt/Police Building	7:30-4:30pm	Mon-Fri
The University of North Carolina at Charlotte – 9300 University City Boulevard – Charlotte, NC 28223 – (704) 786-8000		
Position Description Certification: Signatures indicate agreement with information reviewed and the designation of a Senior Function.		
EMPLOYEE VERIFICATION: I certify that I have reviewed this position description and that it is a complete and accurate description of my responsibilities and duties. Signature: _____ Title: _____ Date: _____		
IMMEDIATE SUPERVISOR'S VERIFICATION: I certify that (a) I am the Immediate Supervisor of this position, that (b) I have provided a complete and accurate description of responsibilities and duties, and (c) I have verified (and reconciled as needed) its accuracy and completeness with the employee. Click here for important information about signatures. Signature: _____ Title: _____ Date: _____		
DEPARTMENT HEAD OR AUTHORIZED REPRESENTATIVE CERTIFICATION: I certify that this is an authorized, official position description of the subject position. Signature: _____ Title: _____ Date: _____		
DIVISION VICE CHANCELLOR OR AUTHORIZED REPRESENTATIVE CERTIFICATION: I certify that this position description, completed by the above-named Immediate Supervisor, is complete and accurate. Signature: _____ Title: _____ Date: _____		

Before completing this form, click [here](#) to learn more about the importance of the Position Description in Career Banding and how the structure of the new PD-102-CB form has improved

SECTION I – General Information about the position

A. Primary Function of Organization: *In no more than 5-6 sentences, explain the primary function and scope of the organization that Click here for details needed.*

The Facilities Management Department provides planning, design, construction, maintenance, repair, and renovation of all UNC Charlotte facilities, in support of the University's instructional, research, and public service missions. Facilities include utilities systems, data systems, streets/roads/sidewalks, structures, building mechanical systems, improved and unimproved grounds, athletic fields, and parking facilities housekeeping, vehicle fleet operations/maintenance, and environmental services (recycling).

The Facilities Business Office is charged with administration of the FM budget. The office prepares and monitors budgets, develops financial projections, manages the FM procurement and billing processes and interfaces with the University's central accounting and purchasing units.

B. Primary Purpose of Position: *In no more than 2 sentences, explain the primary role and purpose of the position.*

The primary purpose of this position is to bill reimbursable areas for services performed by the Facilities Management Department. To be successful in this role requires understanding FM's Computerized Maintenance Management System guidelines, training and mentoring of FM personnel who open and close work requests as well as quality assurance to ensure that all reimbursable funds are captured.

C. What is the Basis for the Request and Context of the Position's Work?

Please Place an X beside the appropriate basis.

This is revising a description for transitioning position to Career Banding (no other explanation required below)

This is a **new** position
[Click here](#)

This is **revising or updating** an existing Career Banded position description – [Click here](#)

D. List the Customers that are the recipients of your work. *Consider these questions:*

For this administrative support position, the major customer focus lies with internal departmental units and staff. The purpose of regular communication is to investigate, explain and resolve problems. For FM personnel, the purpose is typically to explain, instruct and interpret.

SECTION II – Key Responsibilities and Essential Tasks

List major Key Responsibilities and describe the Essential Tasks or work activities that support the output/key responsibility.

- A Key Responsibility should take up at least 10% of an employee's total work time.
- No Key Responsibility may take up less than 5% of an employee's work time.
- Order the Key Responsibilities in Order of Importance (this may not necessarily be the most time-consuming KR).
- Importance should be considered in terms of value to or impact on the organization.

[Click here for instructions on completing this section of the position description and to select the position's primary Key Responsibilities from the standardized list. Do not attempt to complete the form without using the instructions.](#)

1. Key Responsibility

30	<i>% of Time</i>	Maintaining Financial Records	X	This is designated as an ADA Essential Function
-----------	------------------	--------------------------------------	----------	---

Essential Descriptive Tasks:

Correcting and adjusting accounts
 Verifying account balances on a daily basis using Banner Finance Module
 Balancing internal accounting records against Banner
 Problem resolving over-expenditures or purchases assigned to wrong accounts; delayed or missing purchases – example needed –see attached print screens.
 Reviewing and reconciling financial data; identifying variances; and developing corrective actions
 Making journal entries to transfer charges between departments based on billing cycle (3-5 per month)

Primary Functional Competencies Required (Knowledge, Skills, Attributes): [Click Here](#) to select the functional competencies normally associated with the above named Key Responsibility.
NOTE: Arrange Functional Competencies by Order of Importance

BUDGETING – Plans and monitors the use of expenditures to meet organizational objectives and compliance; prepares budget documents and reports. Demonstrates accountability in budget maintenance and reporting.

INFORMATION/RECORDS ADMINISTRATION – Compiles, assimilates, organizes and/or analyzes printed and electronic information. Dependent on role, applies knowledge of data collection, organization, and storage; data research and manipulation; and/or data analysis to record and share information. Applies personal accountability in records and information processing.

PROGRAM KNOWLEDGE – Applies knowledge and understanding of services, policies and procedures related to a program or area of specialization. Demonstrates and applies this knowledge in performance of office support tasks. Explains and interprets information to clients/customers and staff. Exhibits awareness of larger organizational structures impacting specific program or unit.

Primary Behavioral Competencies required in performing this Key Responsibility (Attributes and Values): [Click Here](#) to select the behavioral competencies normally associated with the above named Key Responsibility

ACCOUNTABILITY - Taking responsibility for one's actions and decisions; willingly accounting for the results of an assigned action, including efficiently following assignments through to successful completion with proper attention to detail.

INITIATIVE - Taking prompt action to begin and accomplish objectives; taking action to achieve goals beyond what is required; being proactive.

ORGANIZATIONAL AWARENESS - Understanding the organization's mission, its place in the larger community, the mission and function of the specific work unit, and how it works with other units to serve the customer.

#2 Key Responsibility			
40	<i>% of Time</i>	Using Technology, Software, and Equipment to View, Enter, Modify, or Copy Data	X <i>This is designated as an ADA Essential Function</i>
Essential Descriptive Tasks:			
Routinely using applications not included in Microsoft Office Suite Entering information into Banner Financial (Internet Native Banner) forms Using Microsoft Excel to enter information Creating spreadsheets in Excel Demonstrating expertise in a specialized software program unique to department or unit = Computerized Maintenance Management System (FacilityFOCUS) which tracks unit costs for maintenance/renovation work performed on the campus.			
Primary Functional Competencies Required (Knowledge, Skills, Attributes): Click Here to select the functional competencies normally associated with the above named Key Responsibility NOTE: Arrange Functional Competencies by Order of Importance.			
INFORMATION/RECORDS ADMINISTRATION - Compiles, assimilates, organizes and/or analyzes printed and electronic information. Dependent on role, applies knowledge of data collection, organization, and storage; data research and manipulation; and/or data analysis to record and share information. Applies personal accountability in records and information processing.			
OFFICE TECHNOLOGY - Utilizes office equipment and applies knowledge of other relevant technology (software and systems) to meet work needs. Demonstrates initiative and adaptability when working with technology and new software.			
PROBLEM SOLVING - Understands and identifies problems and opportunities, determines possible solutions, and takes action to resolve the issues. Demonstrates customer service and initiative when addressing and seeking to resolve problems.			
Primary Behavioral Competencies required in performing this Key Responsibility (Attributes and Values): Click Here to select the behavioral competencies normally associated with the above named Key Responsibility.			

ACCOUNTABILITY - Taking responsibility for one's actions and decisions; willingly accounting for the results of an assigned action, including efficiently following assignments through to successful completion with proper attention to detail.

INITIATIVE - Taking prompt action to begin and accomplish objectives; taking action to achieve goals beyond what is required; being proactive.

ADAPTABILITY - Maintaining effectiveness when experiencing major changes in work tasks or the work environment; adjusting effectively to work within new work structures, process, requirements, or cultures.

#3 Key Responsibility

25	<i>% of Time</i>	Preparing, Reviewing, or Processing Forms, Reports, Documents	X	<i>This is designated as an ADA Essential Function</i>
-----------	------------------	--	----------	--

Essential Descriptive Tasks

Maintenance and filing of reports and forms such as Billing reports, Pre-invoice to proof WR's, Customer reports for account review, AP reports for payment processing from FM system then exported into crosswalk for Banner Fupload to AP.

Matching forms to electronic data or internal spreadsheet

Faxing, mailing, or electronically submitting routine reports such as Banner Financial Upload (Fupload), Journal vouchers, Cashier's deposits, Interdepartmental invoices, Customer reports and scanned forms. Copies made of work requests per customer request and sent through Campus Mail.

Submitting forms to other units to initiate an action such as Interdepartmental invoices to AP for payment processing. Journal Voucher's to correct accounting. Req forms and receiving forms for Purchase orders.

Maintaining files for specialized group of forms, requests, reports or authorizations for the Capital Projects group, renovation projects, and utilities.

Authorizing all billing documents as complete

Retrieving filed documents on request

Checking and reconciling data reports

Primary Functional Competencies Required (Knowledge, Skills, Attributes): [Click Here](#) to select the functional competencies normally associated with the above-named Key Responsibility

NOTE: Arrange Functional Competencies by Order of Importance

INFORMATION/RECORDS ADMINISTRATION - Compiles, assimilates, organizes and/or analyzes printed and electronic information. Dependent on role, applies knowledge of data collection, organization, and storage; data research and manipulation; and/or data analysis to record and share information. Applies personal accountability in records and information processing.

OFFICE TECHNOLOGY - Utilizes office equipment and applies knowledge of other relevant technology (software and systems) to meet work needs. Demonstrates initiative and adaptability when working with technology and new software.

PROGRAM KNOWLEDGE - Applies knowledge and understanding of services, policies and procedures

related to a program or area of specialization. Demonstrates and applies this knowledge in performance of office support tasks. Explains and interprets information to clients/customers and staff. Exhibits awareness of larger organizational structures impacting specific program or unit.

Primary Behavioral Competencies required in performing this Key Responsibility (Attributes and Values): [Click Here](#) to select the behavioral competencies normally associated with the above named Key Responsibility.

ACCOUNTABILITY - Taking responsibility for one's actions and decisions; willingly accounting for the results of an assigned action, including efficiently following assignments through to successful completion with proper attention to detail.

INITIATIVE – Taking prompt action to begin and accomplish objectives; taking action to achieve goals beyond what is required; being proactive.

ORGANIZATIONAL AWARENESS – Understanding the organization's mission, its place in the larger community, the mission and function of the specific work unit, and how it works with other units to serve the customer.

4 Key Responsibility

5	<i>% of Time</i>	Providing Customer Service	X	<i>This is designated as an ADA Essential Function</i>
----------	------------------	-----------------------------------	----------	--

Essential Descriptive Tasks

Using interpersonal skills to change the perspective of unhappy clients or customers on a frequent basis such as customer complaints on billing. I often can explain the costs associated to a work request so they understand the reasoning.

Independently resolving customer problems by reliance on extensive program knowledge, analytical skill, and research of past actions

Probing for details in order to assist with customer issues/questions on billing charges, etc. For example, contacting shop supervisors regarding specific charges; inquiring about the status of outstanding purchase orders for billing purposes. Also contact Capital or Design Group project managers and Purchasing as well as the FBO Purchasing Expeditor to get resolution on questions regarding outstanding billing.

Recommending and implementing procedural changes to improve quality of service, for example – recommendations on Purchasing steps for FM and the reorganization with the front desk. Developed a guideline on entering work requests through our FME system which also included a breakdown on what each shop is responsible for. Drafted a proposal to alleviate and ensure expediency of Capital Planning work requests phases. Proposal was implemented.

Providing accurate information and explanations based on FBO procedures and the Purchasing policy guidelines.

Primary Functional Competencies Required (Knowledge, Skills, Attributes): [Click Here](#) to select the functional competencies normally associated with the above named Key Responsibility.
NOTE: Arrange Functional Competencies by Order of Importance

PROBLEM SOLVING – Understands and identifies problems and opportunities, determines possible solutions, and takes action to resolve the issues. Demonstrates customer service and initiative when addressing and seeking to resolve problems.

VERBAL/INTERPERSONAL SKILLS – Conveys information and ideas through a variety of media to individuals or groups; adjusts language or terminology to meet needs of the recipient(s). In verbal interactions and interpersonal relationships, demonstrates commitment to the organizational values of customer service, teamwork, and organizational awareness.

PROGRAM KNOWLEDGE – Applies knowledge and understanding of services, policies and procedures related to a program or area of specialization. Demonstrates and applies this knowledge in performance of office support tasks. Explains and interprets information to clients/customers and staff. Exhibits awareness of larger organizational structures impacting specific program or unit.

Primary Behavioral Competencies required in performing this Key Responsibility (Attributes and Values): [Click Here](#) to select the behavioral competencies normally associated with the above named Key Responsibility.

CUSTOMER SERVICE – Developing and maintaining strong relationships with customers by listening, understanding, and responding to identified needs.

INITIATIVE – Taking prompt action to begin and accomplish objectives; taking action to achieve goals beyond what is required; being proactive.

ORGANIZATIONAL AWARENESS – Understanding the organization's mission, its place in the larger community, the mission and function of the specific work unit, and how it works with other units to serve the customer.

--- If you need to add additional sections for Key Responsibilities (including Essential Tasks, Functional Competencies, and Behavioral Competencies), copy the table above and paste here ---

When all Key Responsibilities and Essential Tasks have been selected with Functional and Behavioral Competencies indicated, please [click here](#).

ADDITIONAL COMMENTS: [Click here](#) for information to include in this area.

This position may include other responsibilities as assigned, within the scope of duties normally assigned in the occupational group.

For Administrative Support Specialist positions only, complete this area – using the guidelines available here

<i>Specialist Field</i>	Accounting clerical support Accounting technical support
<i>Work outputs unique to this position</i>	Account Billing, expenditure tracking, detailed transaction records, account adjustments through use of journal entries, encumbrance generation and control.

SECTION III – Education and Licensures	
<i>Training and Experience – Use guidelines posted here</i>	
MINIMUM TRAINING AND EXPERIENCE: Graduation from high school and one year of office experience; or an equivalent combination of education and experience.	
<i>License or Certification Required by Statute or Regulation: Is a license or certificate required? What kind and type?</i>	
<i>List any training that you think is required or would be helpful for the successful candidate or incumbent. Click here for additional guidance.</i>	
Good knowledge base and understanding of general accounting principles to include journal entries, account reconciliation and investigation, encumbrances, debits and credits. Previous experience in an accounting position preferred.	

Along with the Career Banded job description form, also attach a copy of the current organizational chart (showing where this position resides) and the ADA Checklist (see below). Before printing, please delete any unused "Key Responsibility" boxes above.

"ADA CHECKLIST"

CHECKLIST FOR DETERMINING THE GENERAL PHYSICAL REQUIREMENTS,

PHYSICAL ACTIVITIES, VISUAL ACUITY, AND WORKING CONDITIONS OF SPA STAFF POSITIONS

Circle the letters that correspond with the physical aspects of the essential functions of the position. Essential functions are the fundamental job duties, meaning the position exists to perform the function; there is a limited number of employees among whom the performance of the function can be distributed; and/or the incumbent is hired for expertise or ability to perform the function due to its high specialization. The Americans with Disabilities Act of 1990 (ADA) and associated Federal regulations protect qualified individuals with disabilities from discrimination in all areas of employment. To be considered qualified, an individual must be able to perform the essential functions of a position, with or without reasonable accommodation. It is important that the physical tasks associated with the essential functions be identified appropriately so that persons with disabilities can determine if any accommodation is necessary.

I certify that I have read the physical requirements as set forth below and am physically able to perform the necessary duties as indicated herein.

Employee Signature: _____ Date: _____

Position Title	Position Number
Accounting Clerk V	9540

1. GENERAL PHYSICAL REQUIREMENTS

Please check the ONE description of general physical requirements that best describes the work requirements of the position:

<input checked="" type="checkbox"/>	A. 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. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input type="checkbox"/>	B. Light work: Exerting up to 20 pounds of force occasionally and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of force greater than that for Sedentary Work and the worker sits most of the time, the job is rated for light work.
<input type="checkbox"/>	C. Medium work: Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	D. Heavy work: Exerting up to 100 pounds of force occasionally and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	E. Very heavy work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force constantly to move objects.

2. PHYSICAL ACTIVITIES	
Please check ALL physical activities that apply to the essential functions of the position.	
<input type="checkbox"/>	A. Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
<input type="checkbox"/>	B. Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	C. Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	D. Kneeling: Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	E. Crouching: Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	F. Crawling: Moving about on hands and knees or hands and feet.
<input type="checkbox"/>	G. Reaching: Extending hand(s) and arm(s) in any direction.
<input type="checkbox"/>	H. Standing: Particularly for sustained periods of time.
<input type="checkbox"/>	I. Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
<input type="checkbox"/>	J. Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	K. Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	L. Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
<input checked="" type="checkbox"/>	M. Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
<input type="checkbox"/>	N. Grasping: Applying pressure to an object with the fingers and palm.
<input type="checkbox"/>	O. Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of fingertips.
<input checked="" type="checkbox"/>	P. Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
<input checked="" type="checkbox"/>	Q. Hearing: Perceiving the nature of sounds at normal speaking levels or without correction. Ability to receive detailed information through oral communication, and make fine discriminations in sound.
<input checked="" type="checkbox"/>	R. Repetitive Motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

3. VISUAL ACUITY	
Please check the ONE description of visual acuity requirements (including color, depth perception, and field of vision), that best describes the requirements of the position:	
<input checked="" type="checkbox"/>	A. The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; expansive reading; visual inspection involving small defects, small parts and/or operation of machines (including inspection); using measurement devices; and/or assembly of fabrication of parts at distances close to the eyes.
<input type="checkbox"/>	B. The worker is required to have visual acuity to perform an activity such as: operating machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performing mechanical or skilled trades' tasks of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc.
<input type="checkbox"/>	C. The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
<input type="checkbox"/>	D. The worker is required to have visual acuity to determine the accuracy, neatness, thoroughness of work assigned (i.e., custodial, food services, general labor, etc.) or to make general observations of facilities or structures (i.e., security guard, inspection, etc.)

4. WORKING CONDITIONS	
Please circle ALL conditions the worker is subject to in performing the essential functions of the position	
<input checked="" type="checkbox"/>	A. The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
<input type="checkbox"/>	B. The worker is subject to outside environmental conditions: No effective protection from weather.
<input type="checkbox"/>	C. The worker is subject to both environmental conditions: Activities occur inside and outside.
<input type="checkbox"/>	D. The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
<input type="checkbox"/>	E. The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
<input type="checkbox"/>	F. The worker is subject to noise: There is sufficient noise to cause worker to shout in order to be heard above the ambient noise level.
<input type="checkbox"/>	G. The worker is subject to vibration: Exposure to oscillating movements of extremities or whole body.
<input type="checkbox"/>	H. The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.

	I. The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.
	J. The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
	K. The worker is required to wear a respirator.
	L. The worker frequently is in close quarters, crawl space, shafts, manholes, small, enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
	M. The worker is required to function in narrow aisles or passageways.
	N. The worker is exposed to infectious diseases.
	O. The worker is required to function around prisoners or mental patients.
X	P. None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).