

Job Description

Job Title:	Financial Coordinator
Department:	School of Optometry & Vision Science
Reports To:	Financial Officer, School of Optometry & Vision Science
Jobs Reporting:	None
Salary Grade:	USG 7
Effective Date:	June 2018

Primary Purpose

The Financial Coordinator (FC) provides support to the Financial Officer by monitoring financial activity within all areas of the School including the Clinic, the International Optometric Bridging Program (IOBP), the Centre for Ocular Research and Education (CORE) and the Centre for Sight Enhancement (CSE). S/he is the first point of contact for faculty and staff in regards to personal reimbursement and Unit4. The FC supports the Financial Officer by contributing to training and process documentation, financial reporting and reconciliations.

Key Accountabilities

Financial Administration

- Helps maintain the integrity of the School of Optometry's Unit4 GL structure by reviewing invoices prior to submission to Finance and assessing appropriate account / work order / activity to which the expense is to be charged
- Review and process personal reimbursements through Concur or paper based claims
- Review reconciliations of PCard statements for select users. Provides education to PCard users as required
- Coordinate the collection of data for analysis (teaching allocations and clinic assignments)
- Coordinate the documentation of financial processes and procedures within the Clinic and School. Participate in or lead the development of new and updated processes and procedures with regards to financial process
- Manage the research grant application process to ensure the proper paperwork is on hand prior to Director's sign off. Ensures that copies of all grant submissions are kept on file
- Provide back up to the Financial Manager in their absence, including performing daily deposits and financial reconciliation/submission
- Manage the expense allocation process for CORE to individual research accounts
- Prepare monthly charge outs to offset related expenses incurred in the CORE operating account
- Provide financial support to IOBP when required (Audit, etc)

Financial Reporting

- Extract data from the Clinic EMR system to support robust clinic reports and Key Performance Indicators
- Analysis of financial information and data from EMR and Financial systems to support planning and decision making
- Perform financial analysis of CORE research projects and reporting for submission to the Senior Administrative Team (SAT) and the School Financial Officer. These reports will be a combination of high level org unit reports and individual project reports with a focus on profitability by partner and project

Internal Controls, Processes, Education & Risk Management

- Contribute and support the clinic Internal Controls working group and the School's risk management process
- Identify and lead initiatives to document and/or refine processes and procedures related to internal controls and risk management
- Participate in internal audits and educational initiatives focused on financial matters
- Support the IOBP senior management team with all matters pertaining to the financial accountability and reporting to the Ministry

General Duties

- Provides support to researchers when hiring staff, students and postdocs under their grants to ensure accuracy of completion of paperwork and eligibility of hire. Provides guidance to researchers as to research funds available and any financial considerations related to overall funding or University Financial policies as applicable
- Review graduate research assistant payments for available funds
- Reconcile monthly casual payroll for the School and the Clinic
- Responsible for regular GL reconciliations in operating, trusts and endowments
- Provide administrative support to the Office of the Director when needed

Required Qualifications

Education

- College diploma or university degree, preferably in a business related discipline or equivalent education and experience

Experience

- 3 years of related financial experience with a solid understanding of accounting principles and practices, preferably in an academic environment
- Prior experience in health care or in a regulated professional environment would be an asset
- Ability to manage multiple projects and responsibilities and to prioritize is critical
- Previous experience with in an electronic medical record system is an asset

Knowledge/Skills/Abilities

- MS Word – Intermediate
- Excel – Intermediate
- PowerPoint – Basic
- Other – SharePoint, Unit4, Concur and Microsoft Access are desirable
- Ability to communicate, both orally and in a written format, information at all levels of the organization is essential
- Ability to communicate financial information to both financial and non-financial audiences is required
- Tact, judgement and diplomacy are essential

Nature and Scope

- **Contacts:** Internally, the incumbent will communicate with all employees in all groups within all levels. Outside of the School, the incumbent will have contact with the Dean of Science office, Finance, HR, Office of Research and other academic units.
- **Level of Responsibility:** The incumbent is responsible for applying specialized knowledge and understanding of financial policies and procedures.
- **Decision-Making Authority:** Specialized work with minimal supervision. Required to establish priorities and manage work flow and unexpected requests and assignments. Use judgement and knowledge of the university's accounting policies and procedures to take appropriate action to address

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issues/concerns. Responsible for the execution and operations of financial policies, procedures and practices set by the senior management team.

- **Physical and Sensory Demands:** Minimal demands typical of a position operating within an office environment.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a senior executive position exposed to stress and pressure associated with senior level responsibilities