

**St. Lawrence College
Position Description Form (PDF)**

Effective Date: January 1st, 2013

Updated: October 11, 2022

Campus: Tri-Campus
Incumbent's Name: Vacant
Position Title: Financial Reporting Officer
Payband: J
NOC Code: 1112
Position Number: 00000396
Hours per Week: 35

Supervisor's Name and Title: Director, Financial Services

Completed by:

Signatures:

Incumbent: _____
(Indicates the incumbent has read and understood the PDF)

Date: _____

Supervisor: _____

Date: _____

One-Over-One: _____

Date: _____

Support Staff PDF

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled “A Guide on How to Write Support Staff Position Description Forms” or contact your Human Resources representative for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements**.

Position Summary

Provide a concise description of the overall purpose of the position.

- Responsible for the coordination of all monthly/quarterly/ad hoc financial reports required by grant providers. Provide guidance and training to departmental staff for general ledger review, grant documentation requirements and College procedures.
- Responsible for the preparation and completion of all special audits required by Ministry and/or other grant providers. Required to assess audit risks, plan, and prepare audit file and communicate with external auditors. Required to communicate with the external auditors as needed.
- Analyze and assess potential risks in regard to grant financial requirements and calculate grant payable/receivables for fiscal period ends. Determine appropriate resolutions and propose recommendations to department and Director of Financial Services.
- Responsible for the preparation of the College financial audit grant-related working papers.
- Responsible for the preparation of the Revenue and Grant Reconciliation reporting for the College Financial Information System with the Ministry. Responsible for the completion of other non-grant reporting requirements, including the College’s annual Charity Information Return and supporting schedules and various Statistics Canada reports.

These functions are required to ensure accurate, timely financial reporting that is sufficiently supported by appropriate audit evidence.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

| | Approximate % of the Time Annually* |
|--|-------------------------------------|
| <ul style="list-style-type: none"> Plan, prepare and coordinate year end special audits, as required by Grant providers, with external auditors. This includes scheduling the auditors, preparing audit files, advising departments to ensure all program costs are properly recorded and substantiated, identifying potential audit concerns and resolving all questions/concerns raised by the auditor. | 15% |
| <ul style="list-style-type: none"> Plan, coordinate and review monthly and quarterly reports as required by Grant providers. This includes analyzing program G/L to assess eligibility and completeness of expenses, providing guidance to departments regarding reporting criteria and accounting treatment of expenses, training departmental staff as required, and ensuring that prescribed managerial policies, Ministry guidelines and accounting standards are followed. | 45% |
| <ul style="list-style-type: none"> Assist with the College Information Financial system upload and reconciliation for financial consolidation with the Ministry. | 10% |
| <ul style="list-style-type: none"> Assists with the on-going maintenance and testing of the PeopleSoft Finance system, ensuring that all requests for assistance from the users are met in a timely manner and highlights unresolved system issues to the Director Finance. | 5% |
| <ul style="list-style-type: none"> Assists with monthly and quarterly reconciliations of various general ledger accounts to ensure the GL accurately reflects financial information. | 10% |
| <ul style="list-style-type: none"> Assists with ad hoc financial reporting requirements as they arise and completes additional duties as required. | 15% |
| | 100% |

* To help you estimate approximate percentages:

½ hour a day is 7%

½ day a week is 10

1 week a year is 2%

1 hour a day is 14%

½ day a month is 2%

1 hour a week is 3%

1 day a month is 4%

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the job training in this information.

- Up to High School or equivalent
- 1 year certificate or equivalent
- 2-year diploma or equivalent
- Trade certification or equivalent
- 3-year diploma/degree or equivalent
- 3-year diploma / degree plus professional certification or equivalent
- 4-year degree or equivalent
- 4-year degree plus professional certification or equivalent
- Post graduate degree or (e.g., Masters) or equivalent
- Doctoral degree or equivalent

Field(s) of Study:

Accounting: CPA designation is required.

B. Check the box that best describes the requirement for the specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirements that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No Additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirement obtained by course(s) of a total between 101 and 520 hours
- Additional courses obtained by course(s) of more than 520 hours

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2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of years of experience, in addition to the necessary education level required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or the on-the-job training occurs after the conclusion of the educational course or program.

Less than one (1) year

Minimum of one (1) year

Minimum of two (2) years

Minimum of three (3) years

Minimum of five (5) years

Minimum of eight (8) years

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| Experience in progressively more senior accounting positions. Not-for-profit accounting experience is preferable. Experience with an integrated financial information system (utilizing the general ledger, grants, purchasing, accounts payable and/or accounts receivable modules) as well as a Student Information System is an asset. | |
| | |

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgment required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

| | #1 regular & recurring |
|--|---|
| Key issues or problems encountered. | Awarding of a grant stipulates that an audited financial report is provided to the Grant provider. It is unknown what is required for the audit. It is also necessary to assess the financial risk to the College if the budget is not spent. |
| How is it identified? | Incumbent must locate a copy of the grant agreement and determine the reporting requirements, eligible expenses/overhead, and audit deadlines. If further guidance is required, incumbent will directly enquire with the Grant provider. |
| Is further investigation required to define the situation and/or problem? If so, describe. | Depending upon reporting requirements, it may be necessary for an operational report to be provided with the financial report. In this case, Incumbent must coordinate with the department to ensure this criterion is completed. Based upon reporting requirements and eligible expenses, Incumbent must assess potential audit risks. Incumbent must ensure that an external audit is scheduled, and audit file is prepared for their review. Incumbent must assess the departmental staff's ability to meet reporting requirements to determine if training or further guidance is required. This is essential to ensure the working papers are sufficient for the audit. |
| Explain the analysis used to determine a solution(s) for the situation and/or problem. | Incumbent will assess reporting requirements, format, and expense criteria per the grant agreement. Incumbent will analyze the G/L to assess completeness and accuracy of expenses. If issues exist, incumbent must determine appropriate resolution (i.e., approval to reallocate costs or training issues of grant budget manager). Incumbent must analyze the requirement to record a grant payable or a receivable at the conclusion of the program or year end. Incumbent will prepare the audit working papers (if required) in a format that an external auditor can efficiently perform their audit, ensuring all supporting documentation is provided and available, questions |

What sources are available to assist the incumbent in finding solution(s)? (e.g., past practice, established standards or guidelines.)

are answered, and corrections or issues are addressed all in a timely manner to ensure the reporting requirement is met at the prescribed deadline.

In many instances, incumbent must rely on knowledge gained through previous work experience and/or education to determine method of resolution.

3. Analysis and Problem Solving

#2 regular & recurring

Key issues or problems encountered.

The eligibility of a particular expense to be claimed per the grant agreement is questioned.

How is it identified?

Review the general ledger and notice an unusual expense which may not relate to the program. Incumbent must also thoroughly understand grant agreement stipulations and budget to assess the expense eligibility.

Is further investigation required to define the situation and/or problem? If so, describe.

Locate and retrieve the supporting documentation to further investigate the expense.
Contact the department for further explanation. .

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Incumbent must review signed agreement, and incumbent must analyze transaction to ensure the expenditure conforms to the eligibility criteria. Incumbent must advise department if the expense is ineligible per interpretation or may assist department to obtain written clarification from grant contributor. Oftentimes, the incumbent is required to work with department to instruct him/her on how to provide appropriate documentation to support entry for audit purposes.

What sources are available to assist the incumbent in finding solution(s)? (e.g., past practice, established standards or guidelines.)

Agreement guidelines, past practices in other prior year grants or audits of similar grants.

#3 regular & recurring

Key issues or problems encountered.

Reconciling the general ledger to financial report submitted by department and values do not tie or missing expenses/revenues.

How is it identified?

Departments may not always realize the accounting treatment of some transactions that need to be included in financial statements.

Is further investigation required to define the situation and/or problem? If so, describe.

Incumbent must develop and possess a clear understanding of the college financial system (G/L, A/P & A/R) to ensure the financial statement prepared for the grant reporting is accurate and reflects accurate expenditures. At times departments do not

Explain the analysis used to determine a solution(s) for the situation and/or problem.

realize elements are missing in the statements.

Incumbent must discuss and evaluate with department if there are any expenses/revenue that were incurred but not yet processed in system and may roll into next fiscal therefore evaluate the accounting treatment of the expense or revenue. Incumbent must determine whether an accrual/deferral of revenues and/or expenses is required in the current fiscal year.

What sources are available to assist the incumbent in finding solution(s)? (e.g., past practice, established standards or guidelines.)

In many instances, incumbent must rely on knowledge gained through previous work experience and/or education to determine method of resolution.

3. Analysis and Problem Solving

#1 occasional (if none, please strike out this section)

Key issues or problems encountered.

Complex agreements where a preparation issue (new or infrequent) that requires process/procedure clarification in order to proceed.

How is it identified?

Issue is brought forward by either internal or external customer.

Is further investigation required to define the situation and/or problem? If so, describe.

Yes, incumbent must gain knowledge of the nature of the transaction by communicating with affected parties.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Incumbent outlines facts and recommends a resolution to the Director for further discussion/decision.

What sources are available to assist the incumbent in finding solution(s)? (e.g., past practice, established standards or guidelines.)

Incumbent must draw upon knowledge of generally accepted accounting principles (GAAP) in order to analyze transaction and recommend appropriate accounting treatment.

Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally:

| #1 regular and recurring | |
|---|--|
| List the project and the role of the incumbent in this activity. | Organizing and prioritizing workload in order to complete required tasks in specified deadlines (i.e., reporting deadlines, month end, quarter end and year end). At year end, the incumbent is responsible for leading, planning and completing approximately 2-3 special audits that all have the same due date. |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Incumbent responsible for broad scope of high-level accounting entries and reporting. Time management/multi-tasking and file organizational skills are required. |
| List the types of resources required to complete this task, project, or activity. | Computer resources – Excel, Peoplesoft Finance and Student Administration modules and calculator. |
| How is/are deadline(s) determined? | Deadlines imposed by organization providing the grants and agreement. Month end, quarter end and year end deadlines are set by Director/Accounting Manager. |
| Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples. | Process to achieve tasks is routine and unchanged for the most part. Incumbent has flexibility to amend approach/presentation as deemed necessary. Incumbent expected to highlight to Director the policies/procedures that can be made more efficient or that should be revisited. |

4. Planning/Coordinating

#2 regular and recurring

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| List the project and the role of the incumbent in this activity. | Once funding agreement has been received, the incumbent must plan & organize the reporting requirements with the department and implement a system to achieve all the reporting deadlines. |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Incumbent must determine reporting needs (both internal and external) and develop a system that satisfies all parties' information requirements while continuing to meet legislative requirements. |
| List the types of resources required to complete this task, project, or activity. | Incumbent will consult with internal customers, grantor guidelines and make appropriate recommendations to Director. |
| How is/are deadline(s) determined? | Incumbent with discussions with the Director will set project milestones. |
| Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples. | Incumbent will identify areas that require change, determine impact to partners and recommend changes, where appropriate, to the Director. |

#3 regular and recurring

| | |
|---|---|
| List the project and the role of the incumbent in this activity. | Incumbent may instruct/train other staff to ensure adherence to college's policies and procedures. |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Incumbent must develop and possess a clear understanding of the three systems (Finance/HR/SIS). Incumbent must meet with staff to train or understand how systems work and ensure policies & procedures are in place. |
| List the types of resources required to complete this task, project, or activity. | Incumbent refers to College's policies & procedures as well as training/knowledge obtained from all three college systems. |
| How is/are deadline(s) determined? | Reporting deadlines, month end, quarter end and year end reconciliation deadlines are set by the Director/Accounting Manage. |
| Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples. | Incumbent will identify areas that require/give opportunity for change, determine impact and recommend change, where appropriate, to the Director. |

4. Planning/Coordinating

| | #1 occasional (if non, please strike out this sections) |
|---|---|
| List the project and the role of the incumbent in this activity. | Ad hoc financial report requests. |
| What are the organizational and/or project management skills needed to bring together and integrate this activity? | Incumbent must determine information needs, decide upon appropriate analytical technique, and develop report presentation in consultation with the Director of Financial Services. |
| List the types of resources required to complete this task, project, or activity. | Incumbent is required to draw upon knowledge gained through prior experience and education. |
| How is/are deadline(s) determined? | Deadlines are communicated to incumbent by party requesting information (i.e., deadlines are often imposed upon incumbent). Incumbent must prioritize and work efficiently to meet information needs on a timely basis. |
| Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples. | Incumbent determines whether changes to approach/presentation are required and further recommends Associating Director for discussion/decision. |

5. Guiding/ Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g., other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work skill development.

Though support staff cannot formally “supervise” others, there may be a requirement to guide others using the incumbent’s job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks. Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

| Regular & Recurring | Occasional | Level | Example |
|-------------------------------------|-------------------------------------|--|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students | |
| <input type="checkbox"/> | <input type="checkbox"/> | There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities. | In reviewing and completing reports/audits, incumbent must advise users on how to achieve desired financial outcome via journal entry and also instruct as to what supporting documentation is required for audit purposes. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction. | Incumbent must train less experienced staff in other departments who are responsible for completion/review of G/L activity to be used in Grant reports/audits. Incumbent is responsible for developing financial skills for these employees. |
| <input type="checkbox"/> | <input type="checkbox"/> | The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed. | |

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in this position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

| What are the instructions that are typically required or provided at the beginning of a work assignment? | |
|--|---|
| Regular and Recurring | Occasional (If none, please strike out this section) |
| When a new grant is received, the incumbent must determine what is available for guidance for assessing expense eligibility, grant reporting and audit requirements. If information is not available, the incumbent attempts to contact the Ministry/grant funder to obtain the guidance. Incumbent may also contact the department to obtain information. For the audit, the incumbent works with the external auditors to determine working paper requirements, audit planning and implementation. | Ad hoc financial report requests and new projects are initiated through discussion with Director of Financial Services. |

| What rules, procedures, past practices, or guidelines are available to guide the incumbent? | |
|--|--|
| Regular and Recurring | Occasional (If none, please strike out this section) |
| The incumbent must independently interpret and assess the grant requirements for expense eligibility, overhead assessment, and reporting requirements. The incumbent must use independent judgment to assess risk and completeness. For most assignments, the incumbent will determine the necessary information sources. The incumbent will rely on knowledge gained through previous work experience, education, Ministry or Funding Agency Guidelines, Grant Agreements, PSAB Guidelines and College policies (Industry practices and College policies). Grant guidelines can require interpretation, which requires a level of accounting knowledge and decision-making skills. The incumbent must also interpret applicable accounting guidelines to ensure the reporting of revenue and expenditures adhere to standards and will be approved by the external auditors. | For complex/infrequent accounting issues, incumbent may be required to research/consult Public Sector Accounting Body (PSAB) standards, professional accounting literature, Canada Revenue Agency (CRA) interpretation bulletins, Excise Tax Act and interpretation bulletins and Ministry or funding agency guidelines. |

How is work reviewed or verified (e.g., Feedback from others, work processes, supervisor)?

Support Staff PDF

| | |
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| <p>Regular and Recurring</p> <p>As with all Financial reporting, one over one review and approval is required for audit purposes. However, the incumbent is required to make decisions to ensure the risk to the College is minimized, ensure all reporting accurately reflects the transactions and audit working papers accurately reflect the transactions. The incumbent will ensure the Director of Financial Services is aware of issues.</p> | <p>Occasional (If none, please strike out this section)</p> <p>For special project assignments, work is reviewed upon completion by written report of findings/recommendations. The report is discussed with the Director of Financial Services.</p> |
|--|---|

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|--|---|
| <p>Describe the type of decisions the incumbent will make in consultation with someone else other than the supervisor.</p> | |
| <p>Regular and Recurring</p> <p>The incumbent will work with department to decide on necessary steps to take to resolve a reconciling item/reporting deadline. Incumbent will also work with college wide staff to decide on appropriate level of documentation to support a journal entry for audit purposes. The incumbent may be required to work with Ministry representatives to resolve reporting or grant issues. The incumbent also works with external auditors to ensure successful completion of grant audits.</p> | <p>Occasional (If none, please strike out this section)</p> <p>The incumbent will communicate with end users to determine knowledge gaps and recommend/provide required training to eliminate gap.</p> |

| | |
|---|--|
| <p>Describe the type of decisions that would be decided in consultation with the supervisor.</p> | |
| <p>Regular and Recurring</p> <p>Issues that require a policy/procedure decision/direction/clarification.</p> | <p>Occasional (If none, please strike out this section)</p> <p>Second opinion on interpretation of Ministry/CPA guidelines. Recommending policy/procedural changes.</p> |

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|---|---|
| <p>Describe the type of decisions that would be decided by the incumbent.</p> | |
| <p>Regular and Recurring</p> <p>The incumbent attempts to resolve most issues independently and determines when the supervisor should be consulted. The incumbent must use judgment to determine the appropriate accounting and analytical techniques for each assignment.</p> | <p>Occasional (If none, please strike out this section)</p> <p>Incumbent must decide upon the appropriate method to present the findings and recommendations of ad hoc financial project requests to the parties involved.</p> |

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which a position delivers service to customers. It is not intended to examine the incumbent’s interpersonal relationship with those customers, and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfill the service requirement. A “customer” is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

| Information on the service | | Customer | Frequency (D,W,M,I)* |
|---|---|--|--------------------------------------|
| How is it received? | How is it carried out? | | |
| Grant agreement and reporting requirements | Incumbent reviews grant agreement and discuss reporting requirements and expense eligibility with the department | College wide staff and Grant provider (Ministry) | D |
| Request for information /advice on procedure for financial issues. | Nature of question determined. Clarification / guidance provided. | College wide staff | W |
| Director / Accounting Manager requests financial balance sheet reconciliations. | Incumbent performs and submits. | Director/External Auditor | M |
| Ad hoc financial report request. | Information needs identified. Plan developed as to how to provide information. Incumbent performs financial analysis and presents to requester. | College wide staff / External customer/ Director Finance | M |
| Verbal request from auditor to produce supporting documentation or provide explanation for a transaction. | Incumbent retrieves files and proceed to share/discuss with auditor. | Auditor | D (for 4 months during audit season) |
| | | | |

* D = Daily W = Weekly M = monthly I = Infrequently

8. Communication

In the table below indicates the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g., exchanging information, formal presentations) and written (e.g., initiate memos, reports, proposals) in the section (s) that best describes the method of communication.

| Communication Skill/Method | Example | Audience | Frequency (D,W,M,I)* |
|---|---|---|----------------------|
| Exchanging routine information, extending common courtesy | Responding to staff requests for information / clarification of financial data. | College wide staff | W |
| Explanation and interpretation of information or ideas. | Communicating with internal and external customers to discuss grant, expenditure eligibility & clarification of reporting requests | Internal customers, Ministry/Grantor, External Auditor. | W |
| Imparting technical information and advice | Working with end users re: appropriate documentation in preparation of audit. Training & instructing department on how to record a transaction, or prepare a report | College wide staff | W |
| Instructing or training | | | |
| Obtaining cooperation or consent | Seeking cooperation to meet financial reporting deadlines and approval of calculation of grant payable/receivable | College Managers | M |
| Negotiating | | | |

* D = Daily W = Weekly M = monthly I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, and lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position, or maintaining one position for a long period.

| Physical Activity | Frequency (D,W,M,I)* | Duration | | | Ability to reduce strain | | |
|----------------------------------|----------------------|------------------|-------------------|-------------------|--------------------------|----|-----|
| | | < 1 hr at a time | 1-2 hrs at a time | > 2 hrs at a time | Yes | No | N/A |
| Sitting - Keyboarding | D | | X | | X | | |
| Sitting - Using a calculator | D | | X | | X | | |
| Sitting - Organizing paperwork | D | X | | | X | | |
| Grasping - Talking on the phone | D | X | | | X | | |
| Standing - Photocopying/printing | D | X | | | X | | |

* D = Daily W = Weekly M = monthly I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

Light (up to 5 kg or 11 lbs.)

Medium (between 5 to 20 kg and 11 to 44 lbs.)

Heavy (over 20 kg. or 44 lbs.)

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| Retrieving and transporting files/paperwork. |
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10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform the task and the duration of the task, including breaks (e.g., up to two hrs. at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g., multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

| Activity #1 | Frequency (D,W,M,I)* | Average Duration | | |
|---|----------------------|------------------|-------------------|------------------|
| | | Short < 30 min | Long up to 2 hrs. | Extended > 2 hrs |
| Reading/reviewing/scanning/analyzing financial data. | D | | | X |
| Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input checked="" type="checkbox"/> Usually – with exception of phone/email interruptions and noise of office environment. <input type="checkbox"/> No | | | | |

| Activity #2 | Frequency (D,W,M,I)* | Average Duration | | |
|---|----------------------|------------------|-------------------|------------------|
| | | Short < 30 min | Long up to 2 hrs. | Extended > 2 hrs |
| Keying financial data into financial system or calculator to perform financial analysis. | D | | X | |
| Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input checked="" type="checkbox"/> Usually – with exception of phone/email interruptions and noise of office environment. <input type="checkbox"/> No | | | | |

| Activity #3 | Frequency (D,W,M,I)* | Average Duration | | |
|---|----------------------|------------------|-------------------|------------------|
| | | Short < 30 min | Long up to 2 hrs. | Extended > 2 hrs |
| Listening to inquiries from customers to determine nature of question/concern. | D | X | | |
| Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input checked="" type="checkbox"/> Usually – with exception of phone/email interruptions and noise of office environment. <input type="checkbox"/> No | | | | |

* D = Daily W = Weekly M = monthly I = Infrequently

11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

| Working Conditions | Examples | Frequency (D,W,M,I)* |
|---|--|----------------------|
| <input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below) | | |
| <input type="checkbox"/> accessing crawl paces/confined spaces | | |
| <input type="checkbox"/> dealing with abusive people | | |
| <input type="checkbox"/> dealing with abusive people who pose a threat of physical harm | | |
| <input type="checkbox"/> difficult weather conditions | | |
| <input type="checkbox"/> exposure to very high or low temperatures (e.g., freezers) | | |
| <input type="checkbox"/> handling hazardous substances | | |
| <input type="checkbox"/> smelly, dirty, or noisy environment | | |
| <input type="checkbox"/> travel | | |
| <input type="checkbox"/> working in isolated or crowded situations | | |
| <input checked="" type="checkbox"/> other (explain) | Incumbent deals with both internal and external contacts on a regular basis. Possibility exists for dealing with difficult people. | D |

* D = Daily W = Weekly M = monthly I = Infrequently