

# Sonoma County Office of Education – Job Description

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## Classified Management

### **FISCAL ANALYST-REGION LEC COORDINATOR**

#### **Definition:**

To study, analyze, plan, coordinate and perform the fiscal procedures and functions required of the School-Based Medi-Cal Administrative Activities Program (SMAA or MAA); to act in an advisory capacity to Region 1 Local Educational Agencies (LEAs); to communicate and collaborate with state and county/local administrators; to organize and conduct meetings with district MAA program staff and collaborate with other Local Educational Consortium (LEC) coordinators relative to SMAA matters; and to analyze, plan, coordinate and perform other fiscal procedures, functions and job tasks within Internal Fiscal Services.

#### **Distinguishing Characteristics:**

This job class requires knowledge of school accounting procedures, practices and methods, state SMAA policy and program requirements and is responsible for coordinating fiscal job tasks, exercising independent judgment, discretion and decision-making skills.

#### **Supervision Exercised and Received:**

This position serves under administrative supervision and the incumbent reports directly to and receives supervision from the Internal Fiscal Services Director. This position does not exercise supervision over other employees.

#### **Example of Duties and Responsibilities:**

*Duties and Responsibilities may include, but are not limited to, the following:*

- Independently, as well as collaboratively, works with other LEC coordinators.
- Studies, plans, directs and coordinates the development and implementation of systems and procedures used to collect data necessary for the SMAA program.
- Serves on state-wide Advisory Committee to California Department of Health Care Services.
- Is required to attend state-wide SMAA related meetings and program and software trainings.
- Holds regularly scheduled regional meetings and trainings for all region-wide Local Educational Agencies (LEA) MAA staff through various media or on-site formats.
- Is responsible for set-up and maintenance of Random Moment Time Survey (RMTS) software system and monitor on-going processes to ensure required regional compliance based on State established training protocols.
- Completes required steps necessary to develop, audit and verify excess cost billing reports and procedures.
- Participates in state-wide governance committees to present and explain SMAA policy as necessary.
- Reviews data collected for consistency and accuracy in compliance with state and federal law.

- Collects LEA student enrollment data, and quarterly financial data as well as reviews calculation of LEAs Medi-Cal reimbursement claims.
- Collaborates with regional LEC coordinators on an analysis of new legislation to determine the financial impact on regional LEAs and communicates that impact as the primary fiscal advisor for Regional 1 SMAA.
- Is responsible for timely certification and submission of all regional LEAs claims/invoices to the State.
- Creates and maintains records, spreadsheets and other documentation of all SMAA claims/invoices and payments by the State.
- Develops and maintains internal program budgets.
- Provides initial and ongoing training to LEA and/or County personnel regarding SMAA procedures and compliance requirements.
- Supports the Business Services department as assigned.
- Processes and posts monthly journals for fees charged to the County Office of Education by County of Sonoma Departments.
- Reconciles and reports SCOE student attendance data within the state reporting system.
- Processes and reconciles monthly online payments to ensure appropriate department receives funds.
- Performs related duties as assigned.

## **Employment Standards:**

### ***Knowledge of:***

- Generally accepted accounting procedures and standards including automated financial record-keeping systems.
- Principles, practices and techniques of fiscal and budgetary transactions.
- Financial analysis and research techniques.
- Laws and regulations applying to SMAA operations.
- Data processing as it relates to financial records-keeping.
- Basic office methods, practices and procedures including financial record-keeping.
- Standard English usage, spelling, grammar and punctuation.
- Standard office machines and technology including computers.
- Safe work practices.

### ***Ability to:***

- Respond promptly to requests of internal and external clients; provide needed information, assistance, training, materials and resources.
- Coordinate, plan, organize and prioritize work to meet deadlines and accomplish assigned tasks within established timelines including maintaining accurate records and files.
- Maintain an orderly work environment and perform tasks in prescribed and safe manner.
- Establish and maintain cooperative working relationships with those contacted during performance of job duties.
- Maintain and improve professional skills and knowledge.
- Be flexible and receptive to change.
- Understand and apply principles, techniques and procedures required for effective job performance.

- Apply the principles of governmental budgeting, auditing and accounting.
- Comply with laws and regulations applying to school district accounting operations.
- Conduct financial analysis and do other statistical research.
- Plan, implement and participate in the preparation of accounting reports.
- Accurately check, verify and analyze a variety of accounting data and draw sound conclusions.
- Effectively train and work with others.
- Effectively communicate in both oral and written forms.
- Travel both regionally and state-wide.

***Computer Skills:***

- Basic word processing skills, such as the ability to format, save files for cross-platform use and in different versions, work with toolbars, menus, and rulers, insert graphics, use borders, and print labels and envelopes.
- Basic database skills, such as the ability to sort and retrieve records; create layouts, reports, create and print mailing labels; perform mail merge for form letters; add, edit, delete fields and records.
- Basic spreadsheet skills, including the ability to open, modify, save, and print a new or existing spreadsheet, and enter text and numbers.
- Basic email skills, including the ability to send and open a file attachment.
- Basic Internet usage including the ability to use internet search engines to view web pages, bookmark a site, download a file; print out web pages, copy text, edit bookmarks, print web pages, create hyperlinks and observe copyright regulations.

**Education and Experience:**

*Any combination of education and experience that would provide the knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

***Education:***

- Formal or informal education or training which ensures the ability to read and write at a level necessary for successful job performance supplemented by formal training in the principles, theory and standard procedures of accounting in school district finance is desirable.

***Experience:***

- Increasingly responsible, technical accounting or auditing experience, preferably some experience in finance in a California public school district or county office of education is highly desirable.

***Physical Abilities:***

*The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.*

- Positions in this classification work indoors and sit for long periods of time.
- The position requires daily oral communication in person and on the telephone and frequent written communication.
- Requires speaking and hearing ability sufficient to hear over the phone and carry on routine conversations.
- The work involves operating a computer, calculator, copier and other equipment and involves repetitive arm and hand movement.

- Requires hand-eye-arm and finger dexterity to use a personal computer keyboard, ten-key and other common office equipment.
- Entering data by touch requires the ability to hear computer alarms for errors.
- Forms and copies are color coded, requiring the ability to distinguish among colors.
- Requires visual acuity sufficient to recognize people, words and numbers.
- Lifting twenty (20) pounds on an occasional basis and in excess of twenty (20) pounds with assistance.

***Work environment:***

- Work is performed in an office environment with minimal exposure to health and safety considerations.

***Other Requirements:***

- Must be fingerprinted and satisfactory Department of Justice and Federal Bureau of Investigation records checks must be received by Sonoma County Office of Education, prior to employment.
- TB testing will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- Visual acuity sufficient to read manuals, video display screens, and other related material and work at a computer screen frequently and throughout the day.
- May be required to obtain first aid and CPR certificates within the first 6-12 months of employment.
- May be required to drive with or without students; some positions may require a current California driver license, proof of insurance, and possible participation in the DMV Pull Notice Program once employed.

***Other:***

- Adopted: February 24, 2020
- FLSA Status: Exempt
- Bargaining Unit: Unrepresented
- Approved by: Personnel Commission