


**AREA AGENCY ON AGING FOR SOUTHWEST FLORIDA
JOB DESCRIPTIONS**

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| POSITION TITLE: FISCAL SPECIALIST III | | DEPARTMENT: FISCAL | |
| STATUS: FT | FLSA STATUS: NON-EXEMPT PAY GRADE: NE 6 | SUPERVISE OTHERS: NO | CREATED: 01/2013 UPDATED: 12/2020 |
| SUPERVISOR: FISCAL MANAGER | | CEO APPROVAL/ DATE: 12-28-2020 |  |

GENERAL DESCRIPTION:

This is a position on the staff of the Area Agency on Aging for Southwest Florida, Inc.'s responsible for assisting the Fiscal Manager and to develop, coordinate, implement and administer the overall programs. The individual working in the Fiscal department assists the Fiscal Manager and colleagues in all duties and responsibilities. Areas of responsibility may include but not limited to Contracts and Grants, Accounting, Audits and Monitoring. This work is of considerable variety and complexity, and entails responsible administrative work in maintaining complex records. General clerical duties will require the exercise of initiative and independence.

The individual in this position is responsible for performing activities assigned by the Fiscal Manager. Work is performed under the supervision of the Fiscal Manager who reviews work through reports and conferences for achievement of desired results.

Duties include general accounting, administrative clerical work, and CIRTS data entry. Ability to set priorities, meet deadlines and organize tasks effectively, suggest ways to improve and streamline departmental services. The Fiscal Specialist III is to provide technical assistance to Lead Agencies; and assist the Fiscal Manager in developing statistical information for the Chief Financial Officer (CFO), Chief Executive Officer (CEO) and Department of Elder Affairs

Responsibilities:

1. Assists and serves as the primary resource when the Fiscal Manager is away from the agency. Will confer with the CEO and the CFO to respond to requests from the Department of Elder affairs.
2. Reviews invoices submitted by Lead agencies for accuracy. Verify data on invoices with information included in CIRTS (Client Information Registry Tracking System). Scan all documentation as required for historical data preservation.
3. Assists with monitoring of Lead Agencies and/or solving issues identified in the monitoring.
4. Assists in the completion of reports required by the Department of Elder Affairs including addendums & contracts.
5. Complies with securing fiscal files in accordance with HIPAA regulations.
6. Assist with fiscal review of the Service Cost Report(s).

7. Maintains work-flow process for request of funds from each Lead Agency and by disbursement of funds, and preparation of required fiscal reports by funding source including review of Lead Agency reports, and reconcile AAA ledgers submitted by each Lead Agency.
8. Provides technical assistance to Agency staff and Lead Agencies relative to State and Federal regulations, policies and fiscal procedures.
9. Assures mathematical accuracy of reports; compliance with approved budget; reasonableness of cost; compliance with all appropriate federal, state, and local funds.
10. Performs other duties as assigned.

Required Skills and Knowledge:

- Ability to communicate effectively, orally and in writing.
- Ability to type 40wpm, accurately.
- Ability to research topics related to services for older adults (funding, program design, etc.)
- Ability to perform clerical duties to include: calculating, posting, filing, faxing, scanning documents, printing and maintaining detailed accounting records
- High level of organization and attention to detail.
- Ability to maintain financial records in an accurate, neat, and legible manner.
- Ability to exercise initiative and work independently
- Ability to work under pressure, multitask and meet deadlines on time.
- Ability to organize and maintain files.
- Ability to establish and cultivate effective working partnerships with all staff and Lead agencies.
- Knowledge of Microsoft Office Suite including MS Word, Excel, PowerPoint and database creation and maintenance either in Excel or Access.

Specialized skills and Knowledge:

- Fiscal programs to include thorough knowledge with Community Care for the Elderly, Alzheimer's Disease Initiative, Home Care for the Elderly, Home and Community Bases Services (Medicaid Waiver), Assisted Living, and Older Americans Act regulations, policies and procedures.
- Fund accounting
- CIRTS (Client Information & Registry Tracking System)
- Demonstrated ability to work cooperatively with all colleagues to include AAA staff, Lead Agencies and the Department of Elder Affairs
- Ability to understand and interpret Federal and State regulations and policies
- Ability to analyze reports and implement opportunities to spend down contracts

MINIMUM QUALIFICATIONS/TRAINING/EXPERIENCE:

- Graduation from an accredited four-year college or university with a degree in business accounting and/or business management
- Experience or training in a field related to statistical analysis, planning or budgeting may be substituted for each year of education deemed necessary by the CEO.
- The incumbent/candidate must successfully clear a Level II background screening in order to hold this position

OTHER COMPETENCIES RELATED TO KNOWLEDGE, SKILLS AND ABILITIES AND OTHER PERSONAL CHARACTERISTICS:

- Take personal responsibility and demonstrate accountability for actions
- Travel by car may occasionally be required in this position. The person in this position must be capable of driving a car, must provide their own vehicle, and must maintain a valid driver's license and current automobile insurance.

Physical Requirements:

- Ability to work under stressful situations
- Pleasant and clearly understandable telephone voice
- Ability to lift and carry at least 10 pounds
- Ability to operate computer and other office equipment
- Ability to sit at a desk for more than two hours at a time
- Ability to bend and stoop in order to file and shelve

Work Environment:

The work environment characteristics are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee Acknowledgement:

I acknowledge that I have received and read my job description. I understand that my job or position may change at any time with or without an updated job description and additional instructions from my supervisor may substitute for an updated job description. I acknowledge that questions about my job, job description or job performance should be directed to my supervisor.

Employee Signature: _____ Date: _____

Employee Printed Name: _____

The statements in this job description are intended to describe the general nature and minimum level of work required. The content should not be construed as a complete list of all duties, responsibilities and skills required to meet the criteria for this position.